



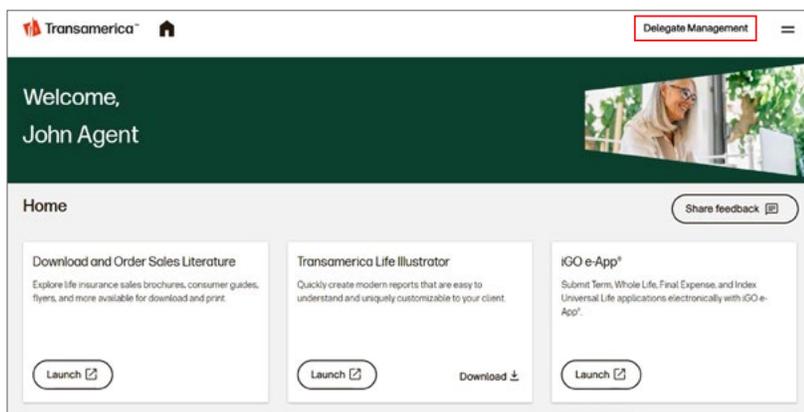
How to assign delegates to Agent Home

Follow these steps for easier business management



1. Adding a delegate

A. Under Delegate Management, click on **Add New Delegate**.



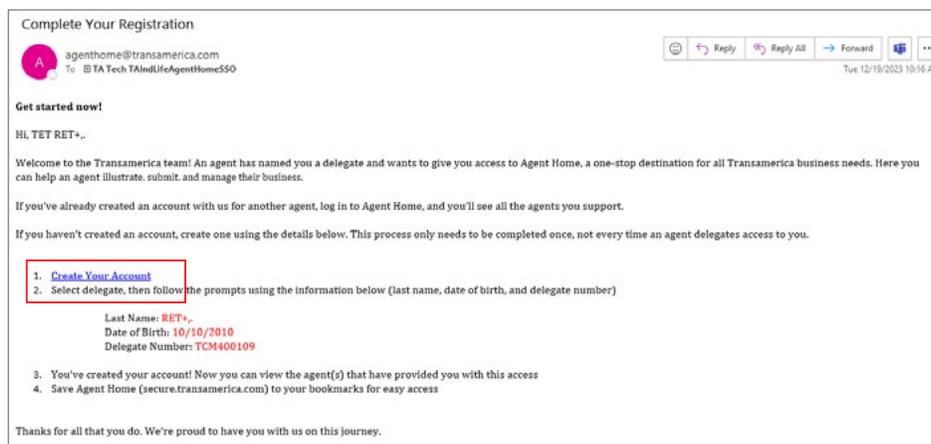
B. To search for an existing or add a new delegate

- i. To search for an existing delegate: Search using Delegate ID, first name, last name, date of birth, ZIP code, email, and/or phone number. If your delegate exists, their name will populate on the existing list.
- ii. Add a new delegate: Click **Add New Delegate**, then enter the identifying information (same as above)

C. You can also provide and update entitlements while adding or updating a delegate.

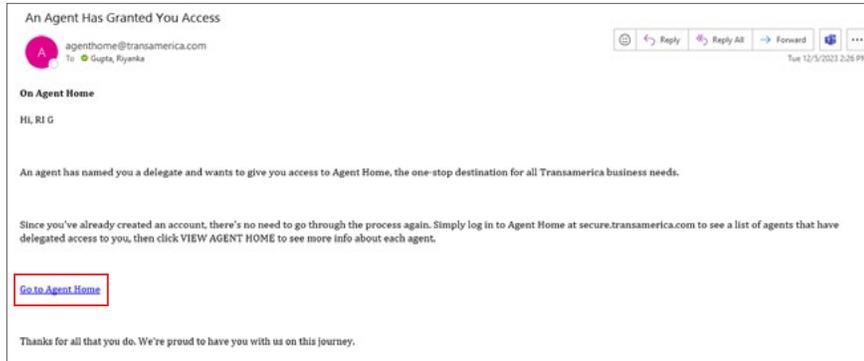
D. If a delegate is no longer with your organization, you can remove the delegate from your assigned list.

2. Once you add a new delegate, the delegate will receive an email to register, which includes all the necessary information and a secure link to create your account and register for Agent Home access.



- The link will take the new delegate to a page within Agent Home where they can create an account.

- After registering with Agent Home, the new appointed delegate will receive an email similar to the one below with a link to Agent Home.



- When the delegate logs into their account for the first time (after registration), they'll need to confirm all their identifying information.

- When logged into their account, the delegate can view the associated list of agents and access their book of business based on the entitlements.

Website technical support:

 Monday through Friday, 9:00 a.m. to 7:00 p.m. ET

 Call **866-301-2473**