Integrity User Access Guide

Overview   This guide provides instructions for Integrity User Access or access into Integrity's IntegrityAgent system, IntegrityAgent.com. It provides information to help Agency Principals and their designated Access Administrators manage their agency employees' secure access to IntegrityAgent.com. It also provides instructions for all IntegrityAgent.com users to change their secure password and reset their security answers for the Web site.
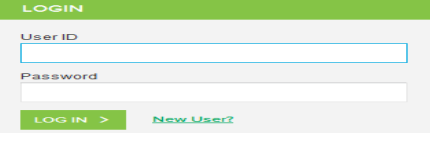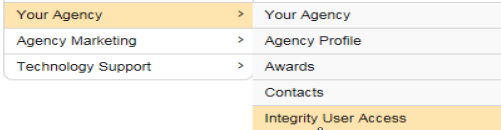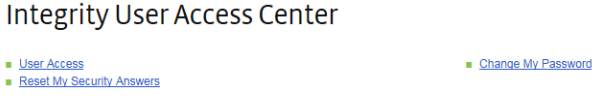
Table of Contents   This User Guide shows how to use the Integrity User Access Center to:

Getting Started and the Definition of Roles

Getting Started   Follow these steps to get started in the Integrity User Access Center:

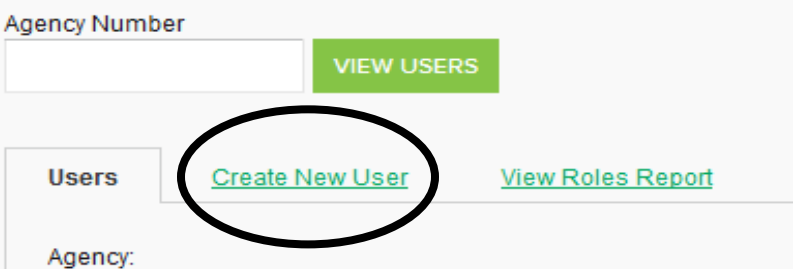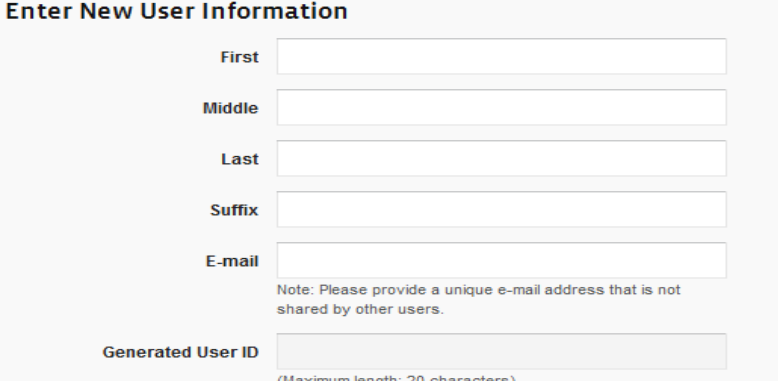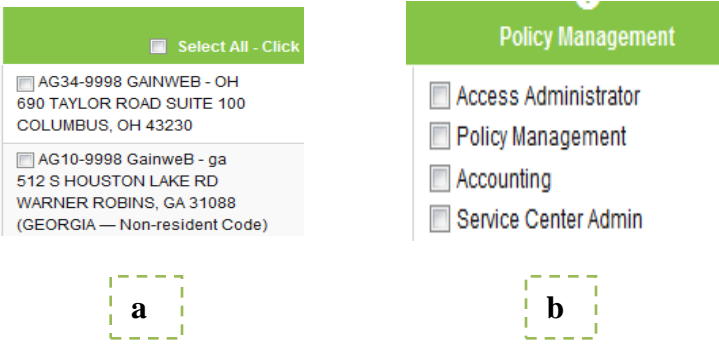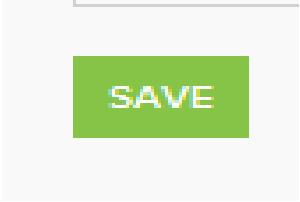| Step	Action	Visual
1	Go to www.integrityagent.com	
2	Type the username and password provided and click the log in button	
3	Select Your Agency then Integrity User Access under the lower left Agency menu	
4	Select Your Agency then Integrity User Access under the lower left	

Roles within IntegrityAgent   Once in IntegrityAgent and the User Access Center, you will have access to different functionality dependant on your role.

Role	Description
Agency Principal	
Access Administrator	The Access Administrator manages an agency's user access to IntegrityAgent.com. Access Administrators can create new users, reset passwords and disable users' access. They can also make changes to the agency's address, email, and contact information
Accounting	Accounting users can view their agency's commission statements. *Only an Agency Principal can assign Accounting permissions.*
Policy Management	User assigned to the Policy Management role can access all sections of IntegrityAgent.com and GAINWeb® except for commission statements. *All users are automatically assigned to the Policy Management role.*

Create User Accounts

Overview   This will guide you through creating a new user account. *Only those assigned the Agency Principal or Access Administrator roles can create new user accounts.*
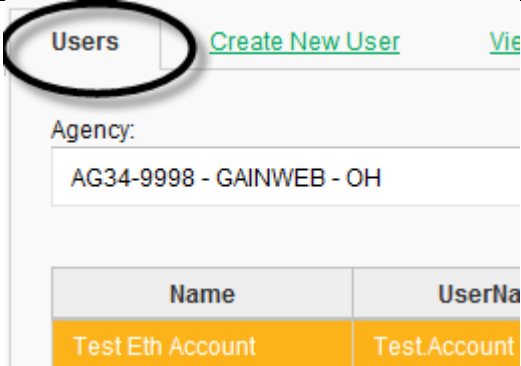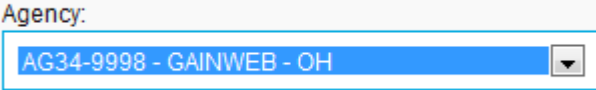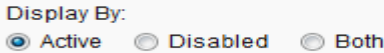
Create a New User Account

Step	Action	Visual
1	Click the Create New User link on the Integrity User Access Center main page.	Agency Number VIEW USERS Users Create New User View Roles Report Agency:
2	Enter the user's first and last name and agency e-mail address	Enter New User Information First Middle Last Suffix E-mail Note: Please provide a unique e-mail address that is not shared by other users. Generated User ID (Maximum length: 20 characters)
3	Assign the user's user permissions for each agency: **a)** Select the box beside each agency code (agXX-XXXX) for which the user should have access **b)** Select the role (or level of access) that each user should have for each agency.	Select All - Click ☐ AG34-9998 GAINWEB - OH 690 TAYLOR ROAD SUITE 100 COLUMBUS, OH 43230 ☐ AG10-9998 GainweB - ga 512 S HOUSTON LAKE RD WARNER ROBINS, GA 31088 (GEORGIA — Non-resident Code) **a** Policy Management ☐ Access Administrator ☐ Policy Management ☐ Accounting ☐ Service Center Admin **b**
4	Click Save to save your entry. The user will then receive an email with a link to confirm the creation of the account. The verification link in the email is valid for 24 hours.	SAVE

View and Edit User Accounts

Overview   Agency Principals and Administrators can view all the users for their agencies, update user information, reset user passwords and disable user access at any time. This will guide you through how to view and edit access.

Viewing and Editing User Accounts

Step	Action	Visual
1	Click the Users tab on the Integrity User Access Center main page.	
2	Click the Agency drop-down menu if you have multiple agencies and you want to view users in another agency code	
3	Select Active, Disabled, or Both option to change the user view.	

Step	Action		
4	From the list you have several options:		
	Edit User	Allows you to update their name, e-mail address or role(s).	
	ResetPassword	Allows you to automatically send a verification email to the user to reset the password. Please note that when you click the link for a user without an email address, you'll be prompted to enter an email address for the user.	
	Disable User Access	Allows you to link to disable the user's access for 90 days. After 90 days, the user's account will be terminated. For users whose access has been disabled, if the Agency Principal or Access Administrator selects the Enable link beside the user's name within 90 days, the user's access will be restored.	
	Note Each time a user's account is created or updated, the Agency Principal and any designated Access Administrator will receive a IntegrityAgent.com User Activity Notice via e-mail.		

View User Role Reports and Principal Email Notifications

User Role Reports   This will guide you through viewing user role reports from the Integrity User Access area of IntegrityAgent.com. *Only those assigned the Agency Principal or Access Administrator roles view user role reports.*
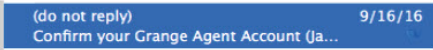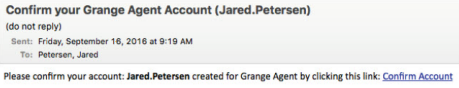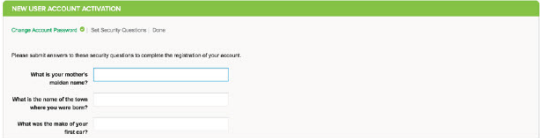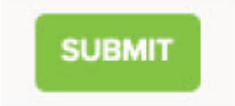
View User Role Reports

Step	Action	Visual
1	Click the View Roles Report tab.	
2	Select the agency you want to view from the Agency drop-down menu if multiple agencies associated with the account.	
3	Select "By Agency" or "By User" to change the roles report view.
.	
4	The list of users will display along with their assigned access for you to review.	

Activate your Account

Activate Your Account
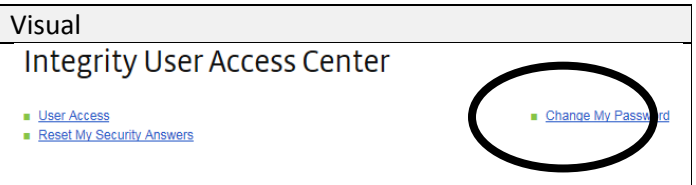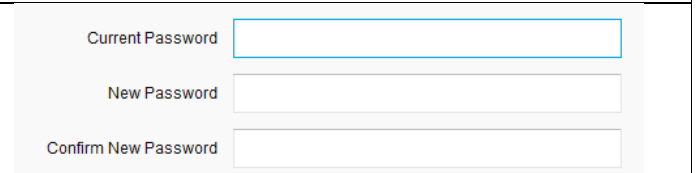
For a new user to activate an account follow the steps below. All user roles can activate their own accounts:

Step	Action	Visual
1	Access the IntegrityAgent confirmation email.	
2	Click the Confirm Account link in the email. Note: This link expires after 24 hours.	
3	Enter and confirm a New Password.	
4	Answer the security questions.	
5	Click Submit to complete the process .	
6	Review the email confirmation.	Review the IntegrityAgent.com Account Notification e-mails notifying you that your password has and your security answers have been changed. You can now log on to IntegrityAgent.com with your User ID and new password.

Change your password and Reset your Security Answers

Change your password

All user roles can change their password and security answers. To change your password:

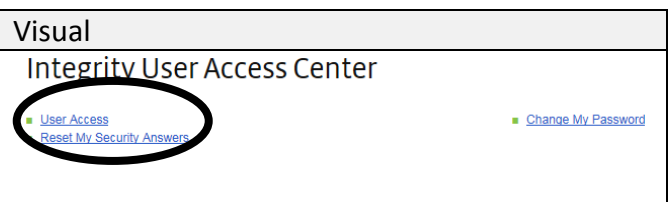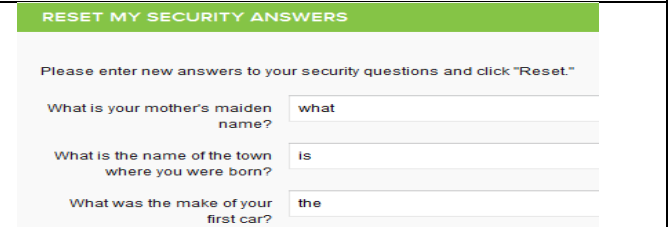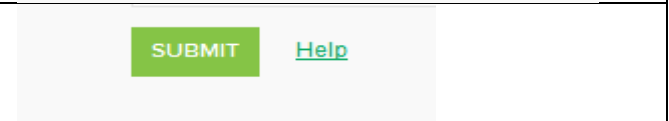| Step	Action	Visual
1	Click on the Change My Password link in the Integrity User Access Center	**Integrity User Access Center** ■ User Access ■ Reset My Security Answers ■ Change My Password
2	Complete the fields on the Change My Password screen	Current Password [ ] New Password [ ] Confirm New Password [ ]
3	Click submit	SUBMIT Help
4	Review the email confirmation	Review the IntegrityAgent.com Account Notification e-mails notifying you that your password has been changed. You can now log on to IntegrityAgent.com with your User ID and new password.

Reset your security and answers

Step	Action	Visual
1	Click on the Reset my Security Answers link in the Integrity User Access Center	**Integrity User Access Center** ■ User Access Reset My Security Answers ■ Change My Password
2	Complete the fields on the Reset my Security Answers screen	**RESET MY SECURITY ANSWERS** Please enter new answers to your security questions and click "Reset." What is your mother's maiden name? what What is the name of the town where you were born? is What was the make of your first car? the
3	Click submit	SUBMIT Help
4	Review the email confirmation	Review the IntegrityAgent.com Account Notification e-mail to confirm that your security answers have been changed.

Frequently Asked Questions

Question	Try
I added a new user and they're unable to log on IntegrityAgent.com. What can I do?	• Verify that the user has clicked the Confirm Account link from the confirmation email. Click the Resend New Account link if it has been more than 24 hours and the user has not confirmed the account. • Verify that the user information is correct on the Integrity User Access Center on the user information screen; click the user's Edit User link on the Users tab if it needs to be updated.
I disabled a user's access, but they still have access to log in. What should I do?	• If you have multiple agencies, a user's access can be disabled for one, some or all agencies so confirm that the user is no longer assigned to any roles for any agencies. • Use the Edit User link on the Users tab to review the roles assigned to that user by agency code and remove access to any additional agencies if they still have it. • You can also select the Disabled radio button next to "Display By" on the Users tab to confirm that the user access has been disabled. • If the user still has access to IntegrityAgent.com, please contact the Agency Interface Call Center at (800) 422-0550, option 4
One of my non-resident agencies is not included in the list of agencies under "Assign User Permissions" on the Create New User tab. Who should I contact?	Please contact the Agency Interface Call Center at (800) 422-0550, option 4.
I logged on IntegrityAgent.com and selected my non-resident agency code, but when I access GAINWeb®, it defaults back to my primary code. What should I do?	You can change the agency code by selecting the agency code you want from the drop-down list in the upper right corner of GAINWeb®
I am an Agency Principal and will be on vacation for several weeks. I would like to give temporary access to another user so he or she can access commission statements.	• To allow another user to access and view your agency's reports, you can assign the Accounting role to any user. Simply click the user's Edit User link on the Users tab and select the box beside the Accounting role. • When this role is assigned, the user will be able to access commission statements under Your Agency – Reports on IntegrityAgent.com. • If you have more than one agency, the Accounting role box needs to be checked for each agency that the user should have access to commission statements.

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Frequently Asked Questions, Continued

Reset your security and answers (continued)

Question	Try
I'm an administrator and set up a user and they didn't receive a temporary password by e-mail. What should I do?	• Verify that the user information, including the email address, is correct on the Integrity User Access Center. Click the user's Edit User link on the Users tab if it needs to be updated. • Click the Resend New Account link and the user will receive a new confirmation email that is valid for 24 hours.
I've tried to log in IntegrityAgent.com and can't remember my password. What should I do?	• On the IntegrityAgent.com Login screen, click "Forgot Password" and follow the prompts and answer the security settings to reset. After you successfully answer the security questions, a confirmation email will be sent to your registered email address and you can click the link to reset your password.