

Broker Services Portal (BSP) Quick Guide

How to add a Broker Delegate or a Broker User

The Broker Super User and Broker Delegates can add new users to BSP.

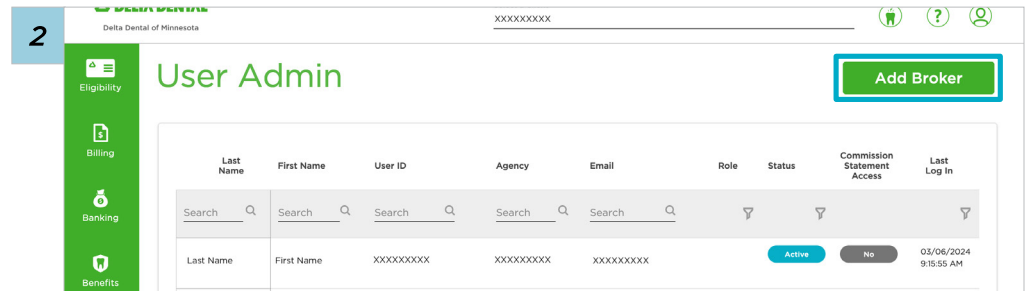
1. On the left navigation menu, click **Users**.

Image 1



2. Click **Add Broker**.

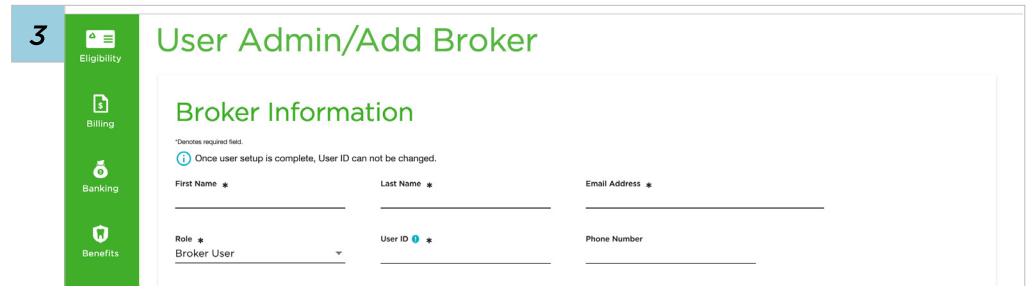
Image 2



3. Enter the following broker information:

- First Name
- Last Name
- Email Address
- Role — Broker Delegate* or Broker User**
- User ID — create a new ID; it cannot be changed once created
- Phone Number

Image 3



* Broker Delegate: this user can have all of the same permissions and access as the user who creates their role, as assigned, including creating new users.

** Broker User: this user has permissions as assigned and cannot create new users.

4. All brokers will be automatically assigned to the new user.

If you do not want to give access to a broker listed, uncheck the box next to their name.

Image 4

5. Click **Save**.

Image 5

The screenshot shows a sidebar on the left with navigation icons for Billing, Banking, Benefits, Reports, Users, and Group Brokers. The 'Users' icon is highlighted. The main content area is titled 'Assign Agent' and contains five rows, each with a checked checkbox and the text 'First Name Last Name'. At the bottom, there are 'Save' and 'Cancel' buttons. The 'Save' button is highlighted with a blue border.

The screenshot shows the same 'Assign Agent' form as in Image 4. In this step, the third checkbox is unchecked, and the 'Save' button is highlighted with a blue border.