

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.

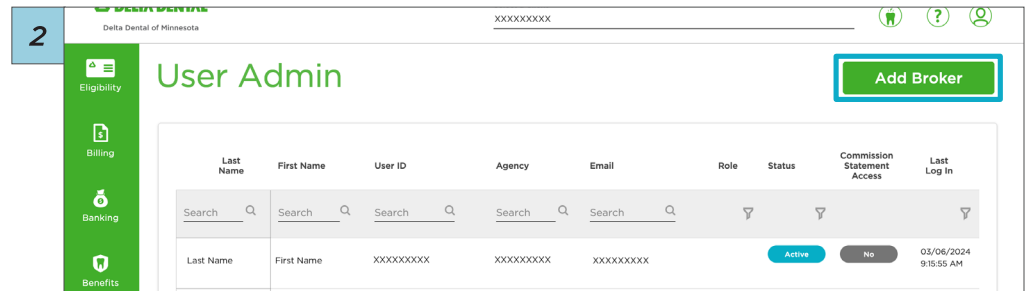
1. On the left navigation menu, click **Users**.

Image 1



2. Click **Add Broker**.

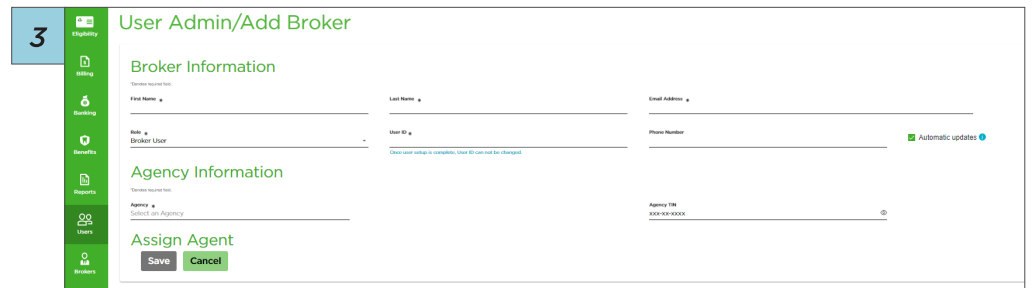
Image 2



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 Super User and 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

