Capabilities of the Agency Support Role

The Agency Support role allows you to view details about the Book of Business for agents you are associated with as well as generate quotes and submit enrollment applications on behalf of an associated agent.

The portal opens on the Dashboard tab, which shows a high-level overview of the activities completed on the account for the agents you are associated with in your agency. On this page, you can select other tabs for the Book of Business or Associated Agents.

You can filter the Dashboard by selecting any of the criteria under View By.

The Book of Business tab shows additional details of the Book of Business for your agency.

You can filter the report by specific agents and dates.
On the **Associated Agents** page, you can view an agent’s account by clicking **Select** on the right side of the table under the **Action** column.

Once an Associated Agent is selected, you can view the details of enrollment applications, quotes, and customers for that agent. You may also quote and enroll customers for any agents you are assigned to.

To select a different agent to work with, click on the blue agent name in the top right corner to return to the main page where you can select a different agent or multiple agents to work with.