

Sales Professional Access (SPA)

How to Add an Authorized
User to your SPA Account



Okta – Mutual of Omaha's New Information Security Platform

- Effective February 24, 2022, Mutual of Omaha is modernizing the way producers and marketers securely access Sales Professional Access by implementing a new platform called Okta
- **Okta is a two-factor authorization process. SPA Login credentials cannot be shared**
 - Okta two-factor authorization methods include: Okta Verify app, SMS/Text, email and voice
- What does this mean to you? You must register with Okta **prior** to February 24th and you may need to add Authorized Users to your SPA account
- To register for Okta: visit login.mutualofomaha.com and follow the prompts
- Review the Okta [procedure document](#) for more information

Okta – Mutual of Omaha's New Information Security Platform



- On or after February 24, 2022, when logging in to SPA, **you will need to use your username and not your email address** to authenticate

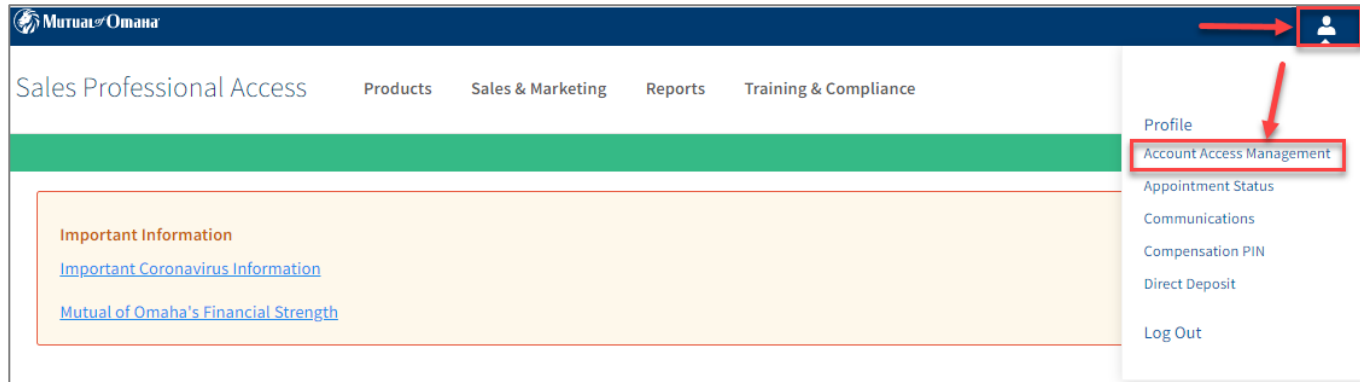
- Don't know your username? You can see it by logging into SPA. Select the profile image and select PROFILE. In the EMAIL ADDRESSES section, select the UPDATE button. Your USERNAME will show under the PROFILE tab



- As **ALL users of SPA need to register for Okta**, and you may need to add Authorized Users to your SPA account
 - Each Authorized User will have their own login credentials to SPA
 - **Okta is a two-factor authorization process; login credentials cannot be shared**
- Here's how to add Authorized Users to your SPA account

How to Add an Authorized User to SPA

- Login to Sales Professional Access prior to January 22, 2022
- Select the PROFILE image in the upper right-hand corner and select **ACCOUNT ACCESS MANAGEMENT** from the drop-down



Determine the Access Level each Authorized User should be granted

- You can select the level of access each Authorized User has on SPA
- NOTE: SPA accounts with a Compensation PIN will still require the PIN to view Compensation Reports and Direct Deposit information

There are three security levels: To customize which level of access authorized users have.			
	Full Access	Moderate Access	Limited Access
Appointment Status	✓	✓	
Case Monitoring	✓	✓	✓
Communications	✓	✓	
Compensation Reports	✓		
Policy Conservation Opportunity Report	✓	✓	
Policyholder Information	✓	✓	
Direct Deposit	✓		
Field Persistency	✓	✓	
Field Placement	✓	✓	
Profile	✓	✓	

How to Add an Authorized User to SPA

- For EACH user of SPA, add them as an Authorized User by completing the required fields

NOTE: the Date of Birth (DOB) MUST match the Authorized User's actual DOB

Authorized Users

You can assign others to have access to your Sales Professional Access account. This is being offered so you won't have to share your user ID with others.

Changes are generally handled within one business day.

[Watch a short video to learn more](#)

Add an Authorized User

Please provide the following information for the individual you would like to add:

First Name	Middle Name	Last Name
<input type="text"/>	<input type="text"/>	<input type="text"/>

Date of Birth	Email
<input type="text"/>	<input type="text"/>

This must match the Authorized User's actual date of birth because it will be used during registration.

Access Level

<input checked="" type="radio"/> Full	<input type="radio"/> Moderate	<input type="radio"/> Limited
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☐ I agree to the [terms and conditions](#)

Submit

Next Steps for the Authorized User

- Once you select SUBMIT to add an Authorized User, the Authorized User receives an email from Mutual of Omaha to complete the registration process
- The Authorized User should follow the instructions in the email to complete the registration process

Jane Jones,

John Smith has granted you permission to view their account in Sales Professional Access. Use the registration key below to complete the setup process.

Registration Key: {\$key}

(Expires in 30 days)

New to the website?

Create your personal account using the key above.

Create Account



Questions?

Please call our Field Assistance Center at 800-847-9785
or email *ProducerTechSupport@mutualofomaha.com*

