

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 includes: 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 <https://login.mutualofomaha.com> and follow the prompts
- Review the Okta [procedure document](#) for more information

Okta – Mutual of Omaha's New Information Security Platform



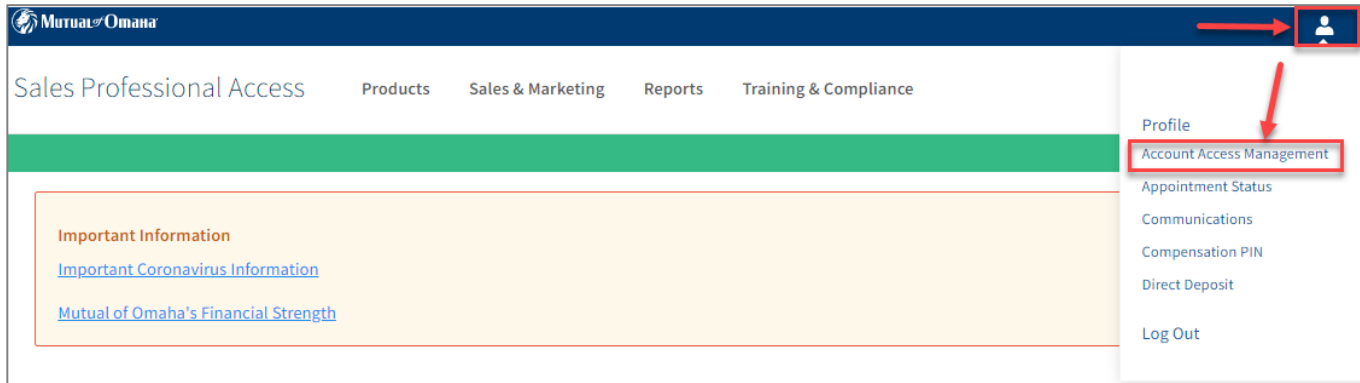
- As **ALL users of SPA need to register for Okta**, and you may need to add Authorized Users to your SPA account
 - Each Authorized User will have their own login credentials to SPA
 - **Okta is a two-factor authorization process login credentials cannot be shared**



- Here's how to add Authorized Users to your SPA account

How to Add an Authorized User to SPA

- Select the PROFILE image in the upper right-hand corner and select **ACCOUNT ACCESS MANAGEMENT** from the drop-down



The screenshot displays the Mutual of Omaha SPA interface. At the top left is the Mutual of Omaha logo. The main navigation bar includes "Sales Professional Access", "Products", "Sales & Marketing", "Reports", and "Training & Compliance". In the upper right corner, a profile icon is highlighted with a red box and a red arrow pointing to it. A dropdown menu is open from this icon, listing several options: "Profile", "Account Access Management", "Appointment Status", "Communications", "Compensation PIN", "Direct Deposit", and "Log Out". The "Account Access Management" option is highlighted with a red box and a red arrow pointing to it. Below the navigation bar, there is a green horizontal bar and a yellow box containing "Important Information" with links to "Important Coronavirus Information" and "Mutual of Omaha's Financial Strength".

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	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
Case Monitoring	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Communications	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
Compensation Reports	<input checked="" type="checkbox"/>		
Policy Conservation Opportunity Report	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
Policyholder Information	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
Direct Deposit	<input checked="" type="checkbox"/>		
Field Persistency	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
Field Placement	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
Profile	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	

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" value=""/>	<input type="text" value=""/>

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

Access Level

Full Moderate Limited

I agree to the [terms and conditions](#)

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



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

Questions?

Please call our Field Assistance Center at 800-847-9785

