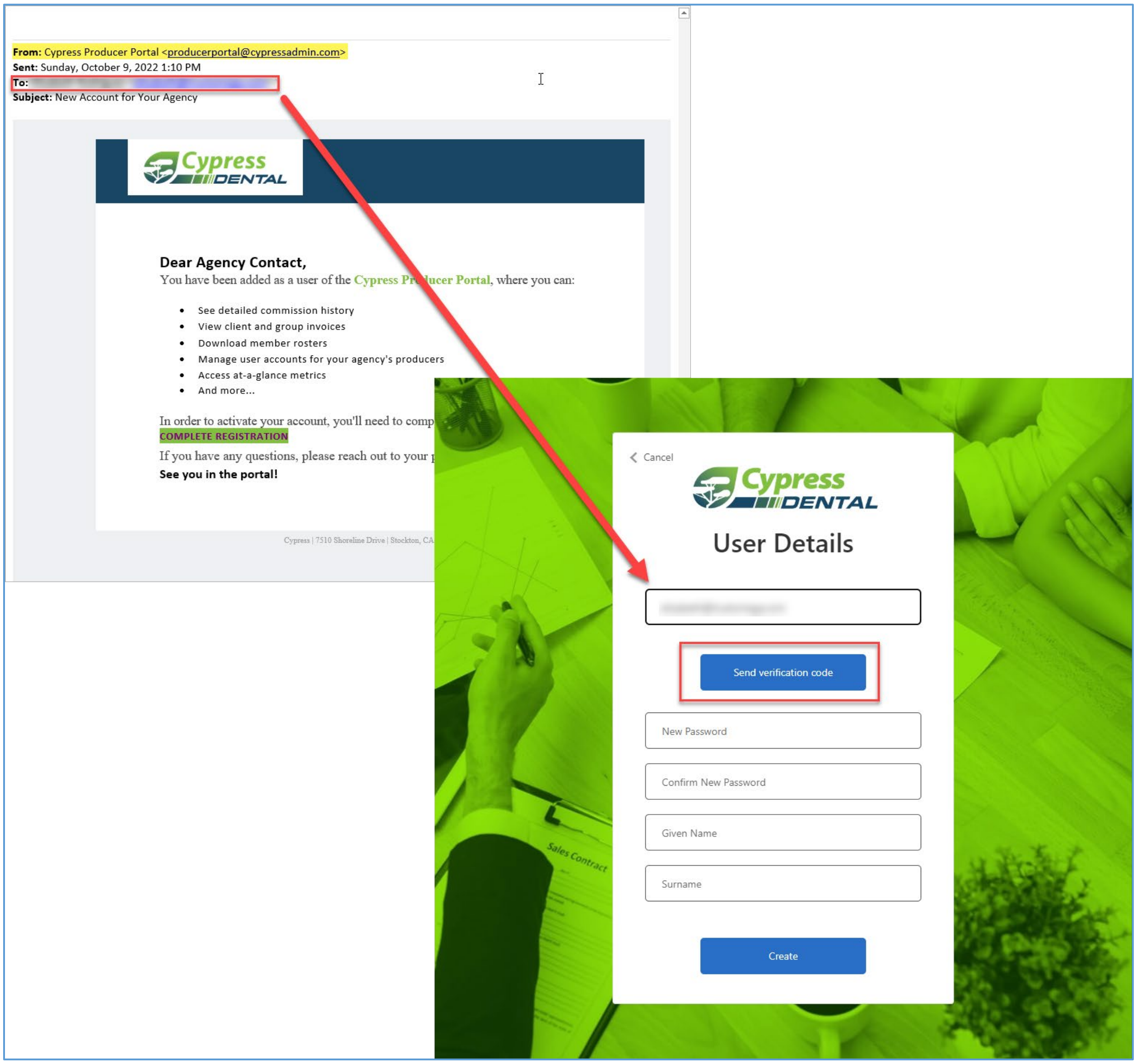
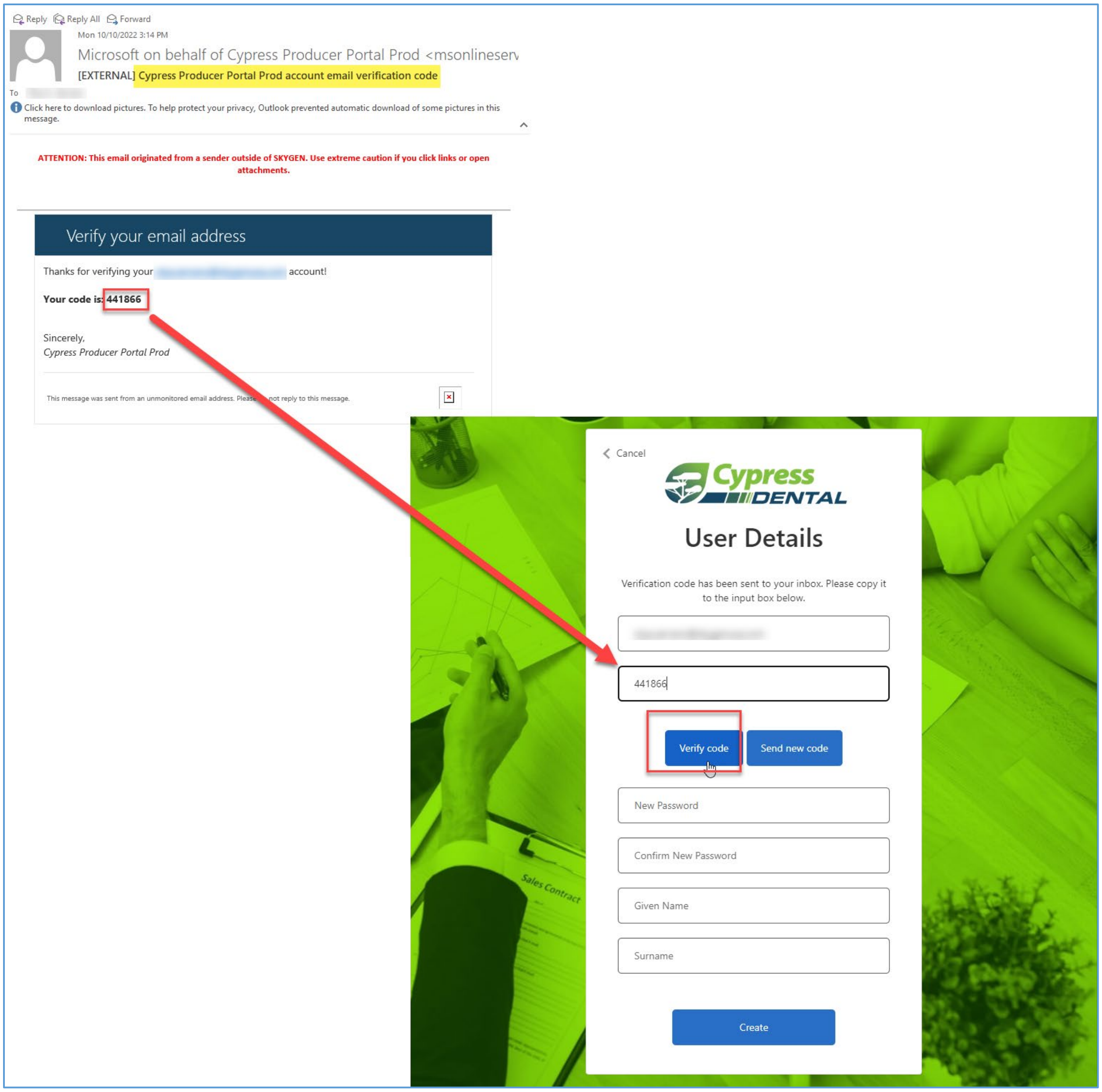
Producer Portal FAQ

Q: I am the primary Agency Admin, how do I register for the Cypress Producer Portal?

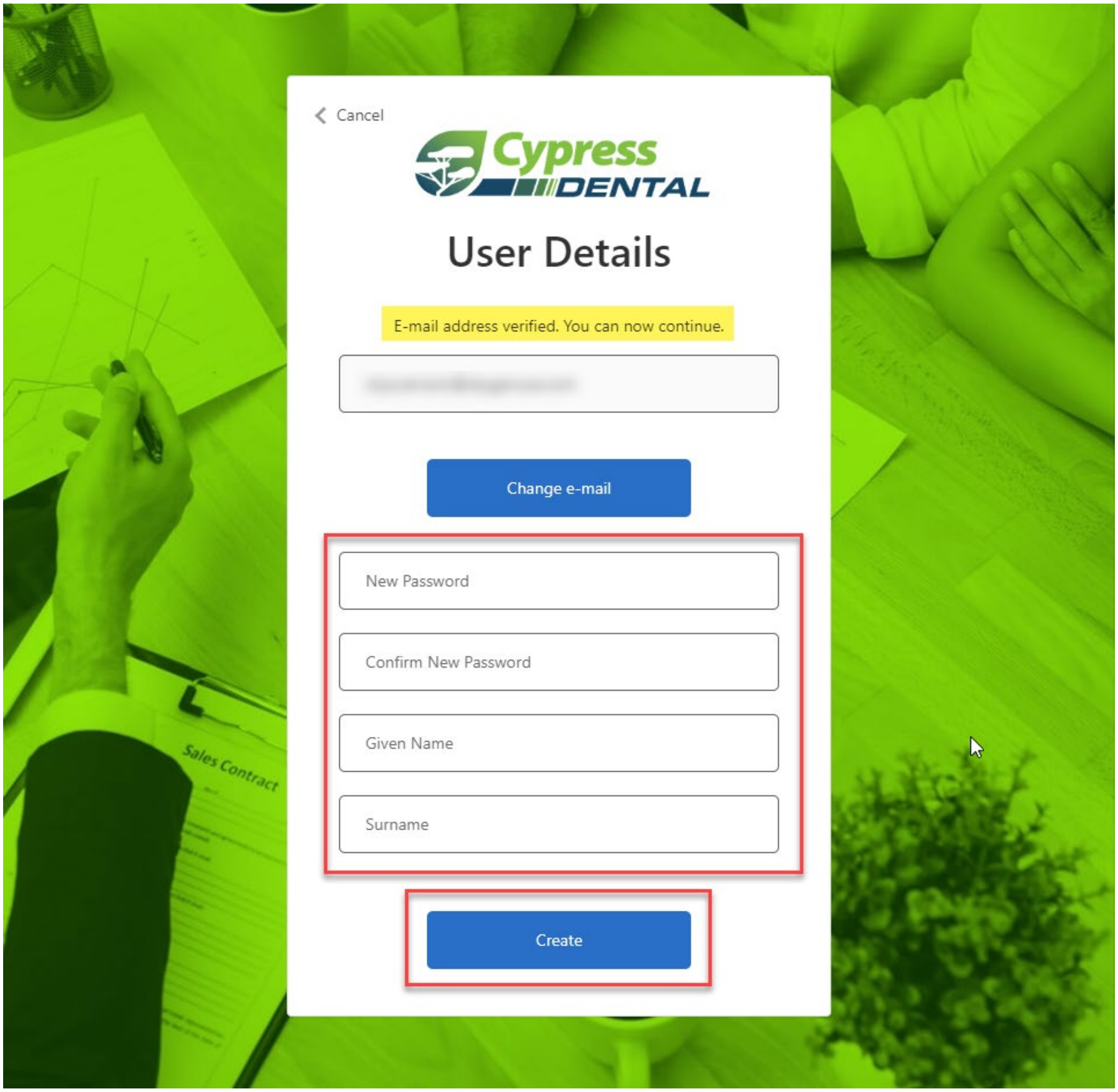
You will received an email invite from Cypress Producer Portal to the email address that we have on file for you as the Admin. Click on “Complete Registration” and enter the exact email address in the Producer Portal registration screen that the invite email was sent to. Then click “Send Verification Code.”



Go back to your emails and find the verification email with your code. Then take this code and enter it into the verification code field on the Producer Portal Registration Page and click “Verify Code.”



When you see the notification "E-mail address verified. You can now continue." You can then complete the rest of the fields and click "Create."

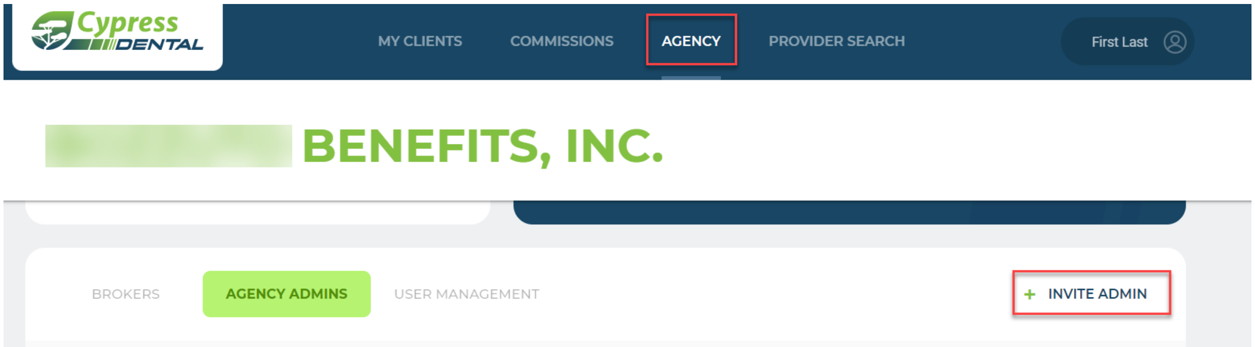


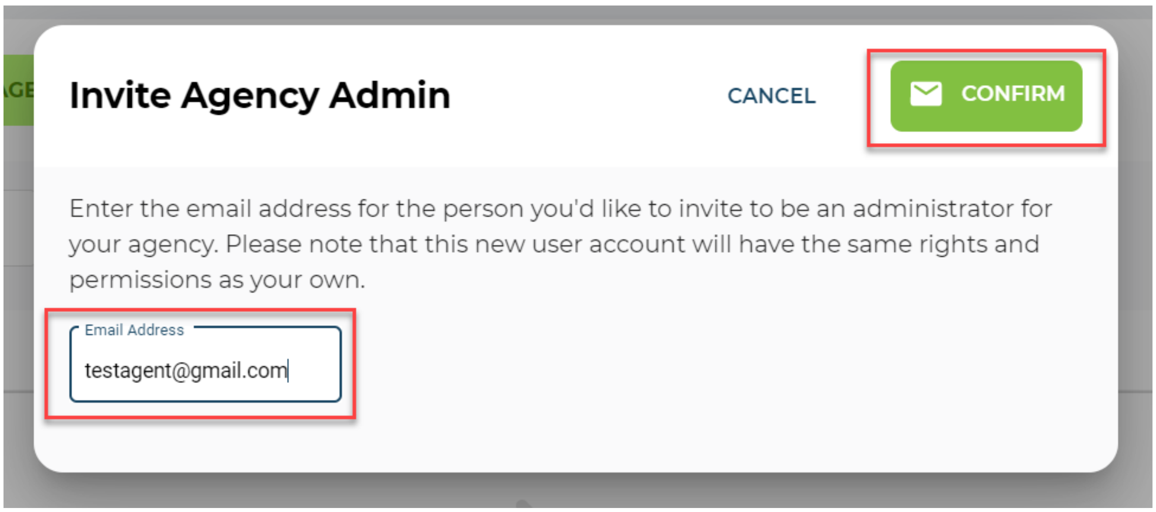
Q: Can there be more than one Agency Admin?

Yes, however, the original Agency Admin will need to be registered on the Producer Portal in order to invite other Agency Admins.

Q: How do I add another Admin Contact to my Agency?

1. From the Agency menu item, click Invite Admin
2. A pop-up entry box will appear. Enter the email address of the Admin contact and click Confirm





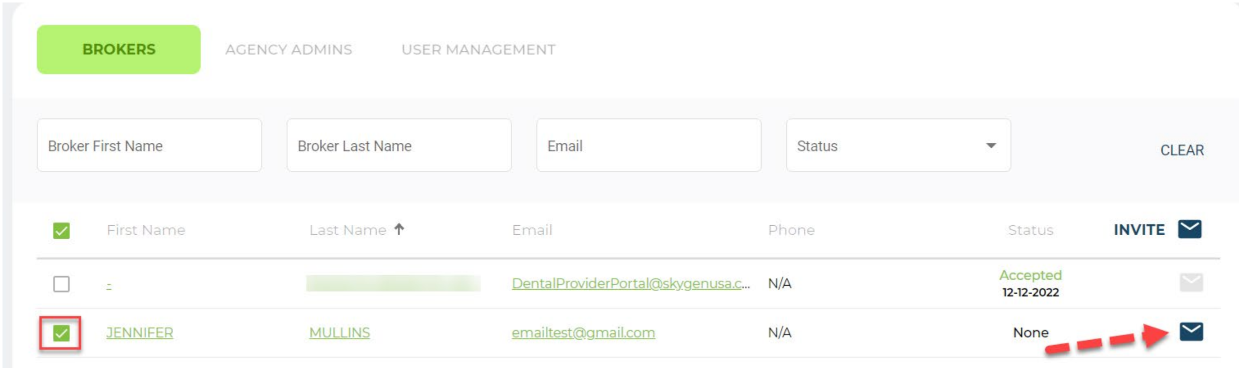
Q: How do I change the primary Agency Admin contact?

The Agency Admin that receives the initial invite should register and they can then still accept and add a user that would have the same access as they do. If the Agency Admin is no longer with the Agency, please reach out to Cypress and they will submit a change request on your behalf.

Q: How do I add Brokers?

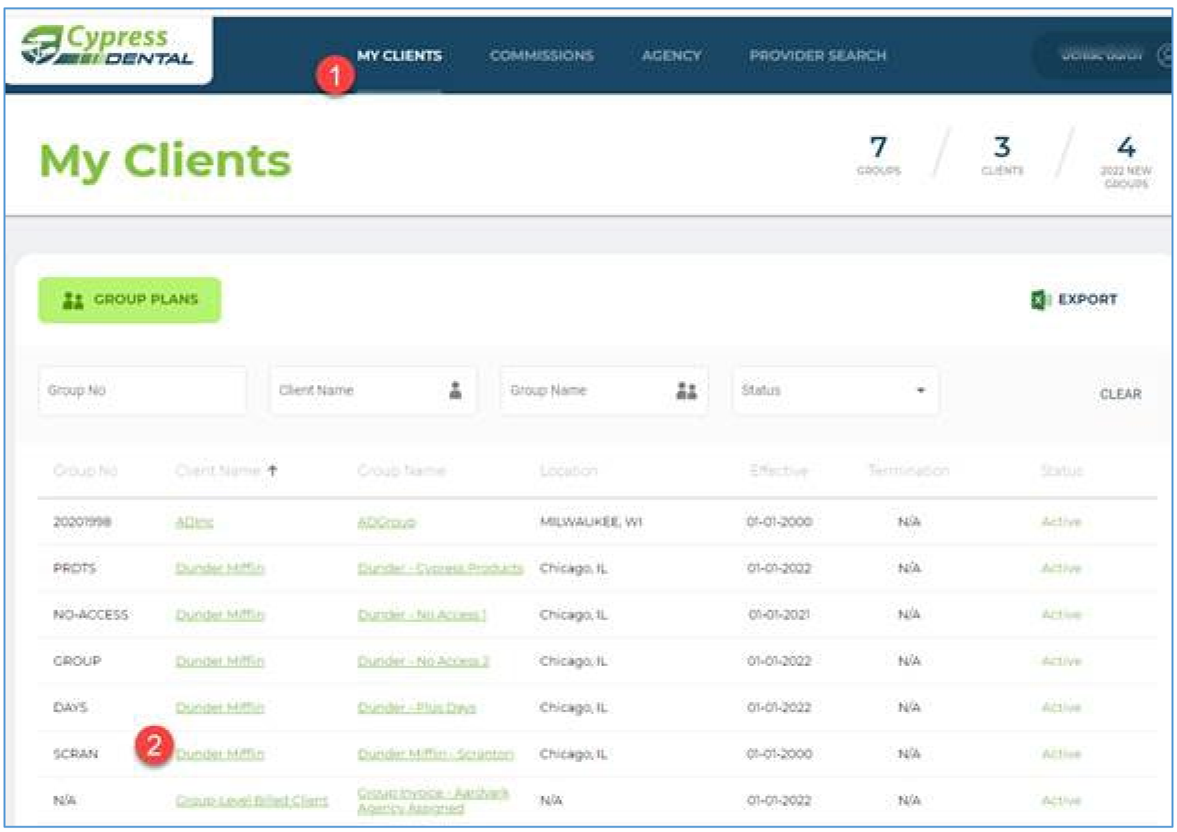
1. Click on "Agency" in the top navigation bar. This will expose the list of brokers associated with your agency.
2. Select the broker you are inviting to join the portal and click on the Envelope icon to invite them.

If a broker is missing from the list that appears for your agency, please contact Cypress to have the broker added.

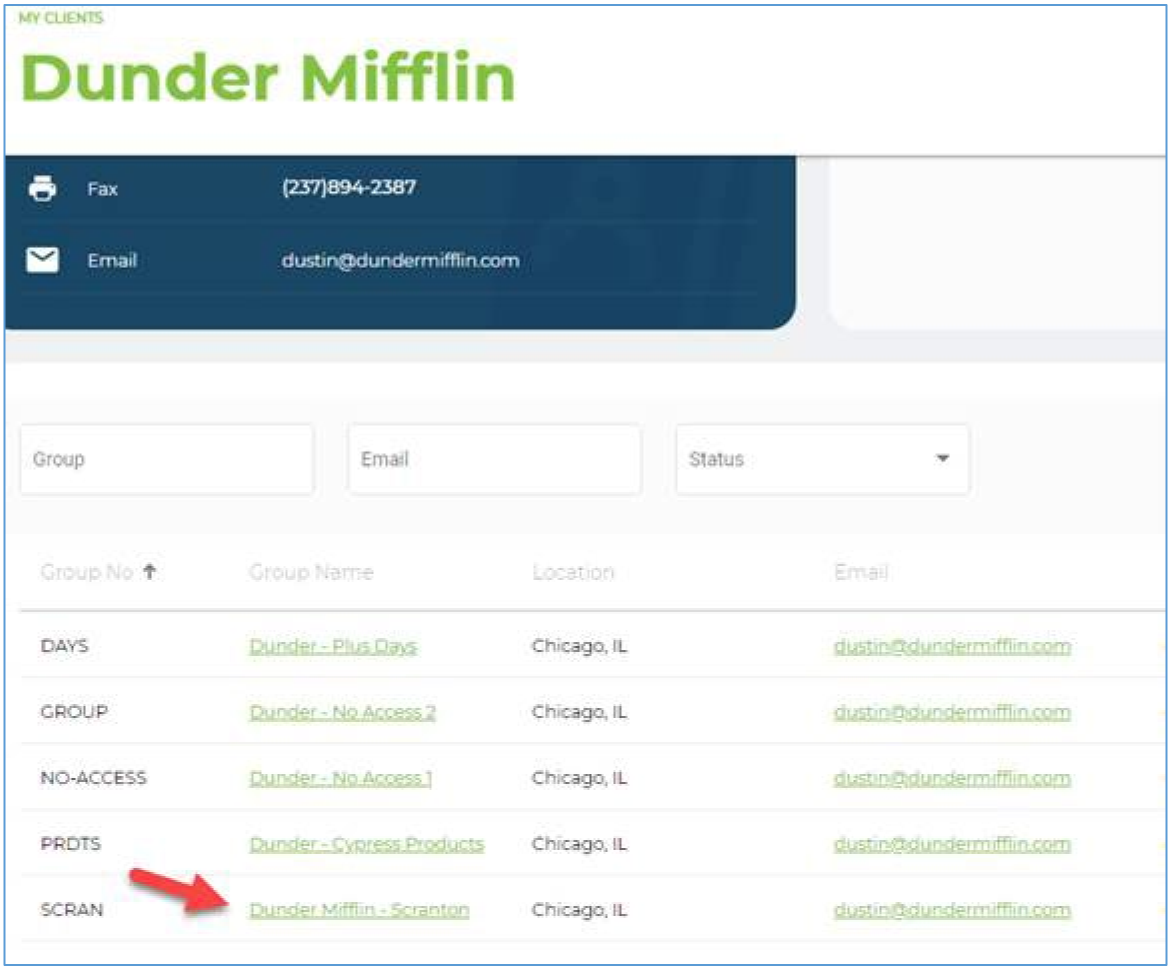


Q: How do I update member information?

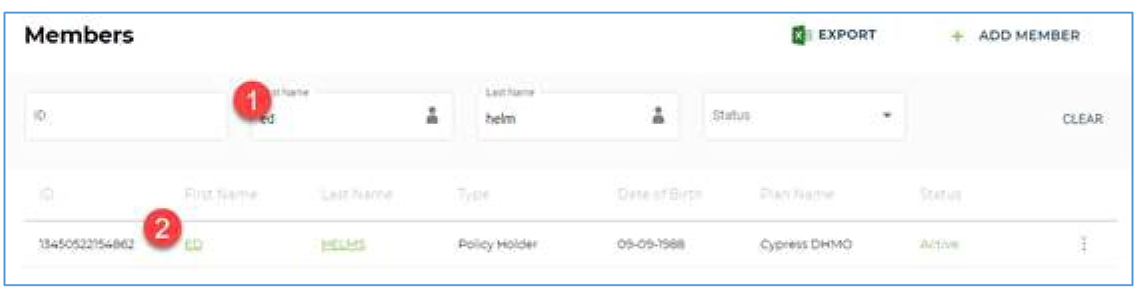
1. Under My Clients, click on a Client Name



2. Click on Group Name:



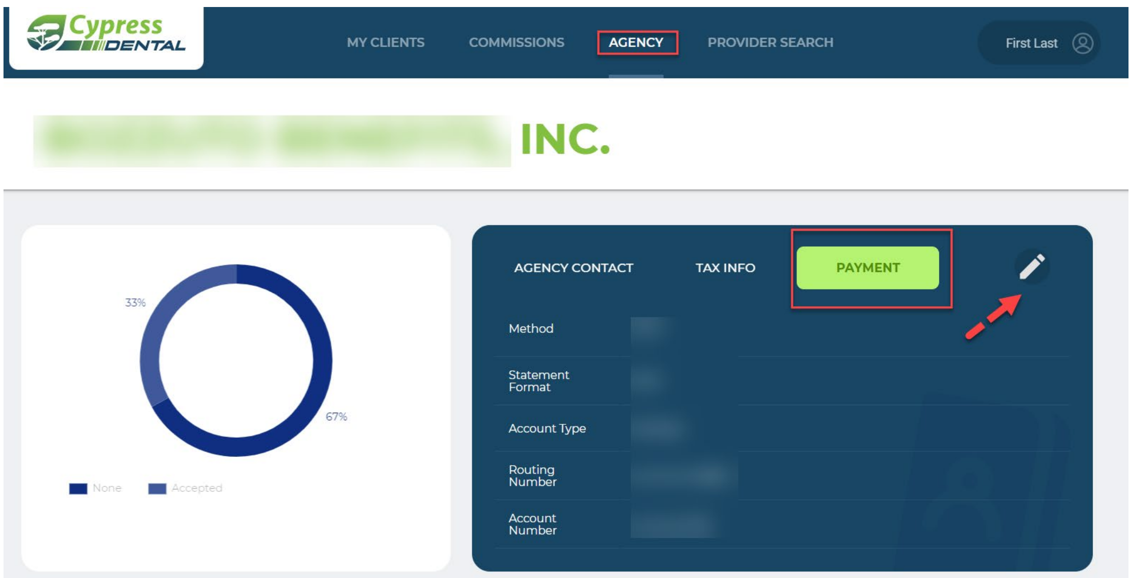
3. Locate member that you want to edit:



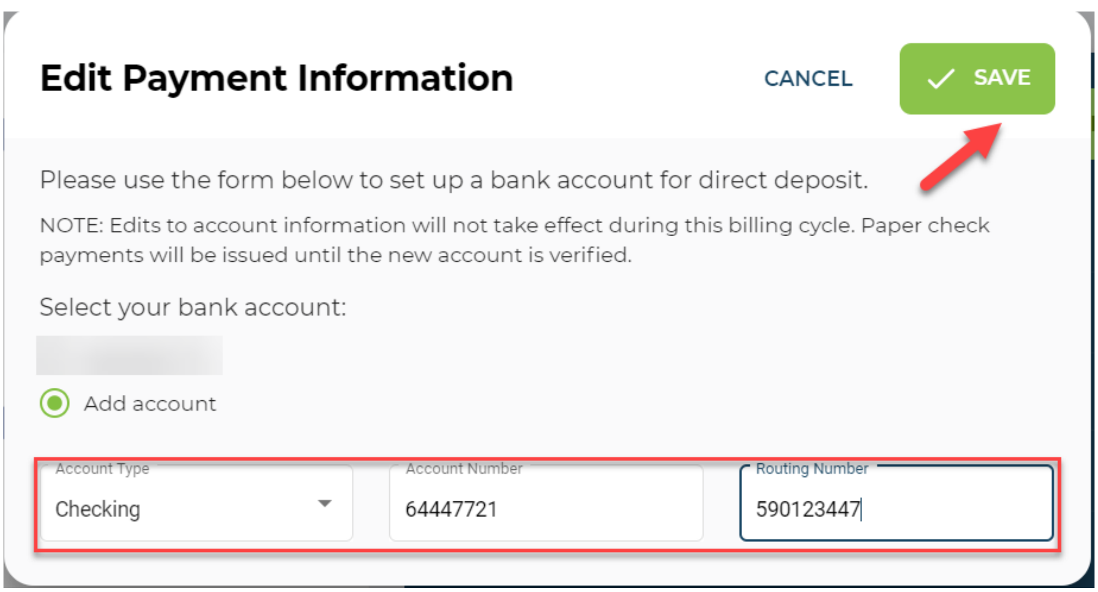
4. Editable if pencil icon is available:

Q: How do I sign up for Direct Deposit?

Under the Agency menu, select the Payment option and click the pencil icon to begin editing your agency's payment details



A pop-up box will appear. Select "Add account," identify the account type: Checking or Savings, enter the account and routing numbers and Click save.



Q: Who can see Group Invoices?

The broker at an agency must be associated with the group in order to see the invoices. If another broker at the agency is associated or no broker is associated, the record will need to be adjusted in order for the invoice to appear in the broker's portal view.

Q: Can I download an ID Card?

Yes, you have the ability to download and print a PPO ID card.

Q: Will brokers see only their clients or all clients of the agency?

Agency Admin can see all clients. Brokers will only be able to see their own clients.