

Register in the Broker Portal

This guide is intended to show you how to register and prepare your broker profile in the Broker Portal.

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Registration

If you are a new user to the system you must register before being approved to act as a broker. **Click** on Registration as shown below:

To access our system, enter your username and password. If you do not have an account click here to begin the [Registration](#) process.

Enter the required information and **click** “Next”. Ensure you provide a valid email address so that instructions and notifications are properly sent to your email account.

CREATE A NEW ACCOUNT

Use the form below to create a new account. All fields are required.

Account Information

User Name:

E-mail:

Password:

Confirm Password:

Passwords are required to be a minimum of 6 characters in length.

Personal Information

Enter the NAID, the NAID Expiration Date, and First and Last Name. Office and Mobile Phone numbers are optional. **Click** “Next”.

YOUR PERSONAL INFORMATION

NAID, Expiration, First Name and Last Name fields are required.

My Information

NAID*:

Expiration*:

First Name*:

Last Name*:

Office Phone:

Mobile Phone:

Office Information

Enter the information for your first office here, more offices can be added from your “My Profile” page after registration is complete. This should be your primary office. **Click** “Next”.

YOUR OFFICE INFORMATION

Office Name, Address Line 1, City, State and Zip fields are required.

Office Information

Office Name*:

Address Line 1*:

Address Line 2:

City*:

State*:

Zip*:

Terms of Use

Next read the Terms of Use for the site and **click** “Accept”.

ACCEPT TERMS OF USE

Read through the Term of Use below.

Terms of Use

No Warranties

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- for any indirect, special or consequential loss; or

Diversity Information

Fill out the Diversity Survey (information about your business' classification and ownership) by answering all questions with "Yes" or "No". Scroll through the entire survey, and then when you are done, **click** "Submit" at the bottom of the page.

Veteran-Owned Small Business

Is your business 51% or more owned by one or more Veteran(s) as defined in 38 U.S.C. 101(2)? Yes No

Minority-Owned Business Enterprise

Is your business 51% or more owned by one or more member(s) of a minority group? Yes No

Are the daily management and business operations of your business controlled by one or more member(s) of a minority group? Yes No

Is your company certified as a Minority-Owned Small Business Enterprise (MBE) by any certifying organizations? Yes No

That completes the initial registration. From the confirmation page click "Go to Portal". You will have limited permissions until you are approved and you will not be able to accept work until MMREM reviews your information and approves your account.

You will be able to read the FAQs, watch How-To videos, and manage your Profile (see the "My Profile" section later in this document). You should take time to review the entire list of resources available to you on the Broker Portal.


My Profile

This page is used to manage your Broker and Diversity information.

Click “My Profile”.

MY PROFILE

Required fields are marked with an asterisk.

Broker Information	Diversity Information
*NAID: 1234	Office Phone: (111) 333-8585
*Expiration: 1/27/2012 	Toll Free: (111) 800-2202
*First Name: tracy	Mobile Phone: (111) 222-3334
*Last Name: ray	Web Site:
*Email Address: tracybroker@quipsites.com	Facebook:
	Linked In:

Update

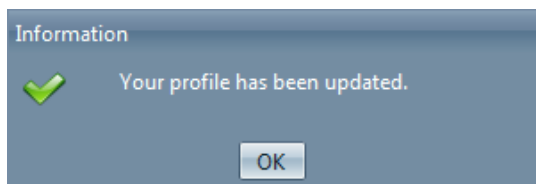
In the Broker Information tab enter:

- NAID#
- Expiration Date
- First and Last name
- Email Address
- Office Phone
- The fields below are optional:
- Mobile Phone
- Web Site
- Facebook
- Linked In
- (You may manually **enter** the expiration date or **click** the calendar icon and **select** the date)

Only fields marked with an asterisk (*) are required, all others are optional.

Click “Update”.

A pop up message will appear saying “Your profile has been updated”.



Next, **click** the Diversity Information tab.

Broker Information	Diversity Information
<p>✔ Small Business</p> <p>Is your business a "Small Business Concern" as defined by the Small Business Act and the regulations contained in 13 C.F.R. Part 121? <input type="radio"/> Yes <input checked="" type="radio"/> No</p>	
<p>✔ Small Disadvantaged Business</p> <p>Is your business certified as a Small Disadvantaged Business (SDB) as defined by 13 C.F.R. 124.1002? <input checked="" type="radio"/> Yes <input type="radio"/> No</p>	
<p>✔ Ownership</p> <p>Is your business privately or publicly owned? <input checked="" type="radio"/> Private <input type="radio"/> Public</p>	
<p>✔ Woman-Owned Business Enterprise</p> <p>Is your business 51% or more owned by one or more women? <input checked="" type="radio"/> Yes <input type="radio"/> No</p> <p>Are the daily management and business operations of your business controlled by one or more women? <input checked="" type="radio"/> Yes <input type="radio"/> No</p> <p>Is your company certified Woman-Owned Small Business Enterprise (WBE) by any certifying organizations? <input checked="" type="radio"/> Yes <input type="radio"/> No</p>	
<p>✔ Certified HUBZone Business</p> <p>Is your business identified on the Small Business Administration website list of HUBZone Small Business Concerns? <input checked="" type="radio"/> Yes <input type="radio"/> No</p>	
<p>✔ Service-Disabled Veteran-Owned Business Enterprise</p> <p>Is your business 51% or more owned by one or more Service-Disabled Veteran(s) as defined in 38 U.S.C. 101(2) and 38 U.S.C. 101(16)? <input checked="" type="radio"/> Yes <input type="radio"/> No</p>	

Answer each question as it applies to your business by **clicking** the radio buttons.

Click "Update".

(You must answer each question)

Note: If you would like to view the online "How To Video", go to the Broker Portal FAQ page and select the "How do I manage My Profile?" video.

My Offices

This page is used to change information about your office(s) and coverage areas or to **enter** a new office.

MY OFFICES

		Name	Address	City	State	Zip	Phone
	<input checked="" type="checkbox"/>	tracy's office (Default)	123 Main St	Mineola	TX	75773	
	<input checked="" type="checkbox"/>	Sat. Office	123 Main St	Winona	TX	75792	
	<input checked="" type="checkbox"/>	tues office	345 main	Tyler	AK	78987	
	<input checked="" type="checkbox"/>	tues office	345 main	Tyler	AK	78987	
	<input checked="" type="checkbox"/>	Ethan's Office Test	123 Test Lane	Flint	TX	75762	(903) 555-4879

Navigation: [K] [←] [1] [→] [X] Page size: 25 5 items in 1 pages

The above screen shot shows existing offices.

- **Click** the pencil icon beside the office to edit any office or coverage information.
- After editing the office information **click** “Update”.

To enter a new office:

- **Enter** the “Office information”.
- **Check** the “Default Office” if desired.
- **Click** “Update”.

Office Information	Coverage Areas
Office Name: <input type="text" value="New Broker Office"/>	POC Name: <input type="text"/>
Address Line 1: <input type="text" value="123 Broker Office Lane"/>	POC Phone: <input type="text"/>
Address Line 2: <input type="text"/>	POC Mobile: <input type="text"/>
City: <input type="text" value="Tyler"/>	POC Email: <input type="text"/>
State: <input type="text" value="TX"/>	
Zip: <input type="text" value="75702"/>	Default Office: <input checked="" type="checkbox"/> (check to make this office your default office)
Phone: <input type="text" value="1112223333"/>	
	<input type="button" value="Cancel"/> <input checked="" type="button" value="Update"/>

Managing Coverage Areas

Click “Coverage Areas”.

Office Information	Coverage Areas
Office Name: <input type="text"/>	POC Name: <input type="text"/>

Coverage Areas

Select an office and then click the coverage area tab to display the coverage areas for that office. This tab page (below) is used for adding or updating your coverage area. Each office is limited by the system to 60 zip codes maximum for coverage area.

- First, **select** a state from the drop down arrow.
- Then, **select** the County (s) and the City or Cities you service by highlighting them.
- Next, **select** all of the zip codes in your coverage area.

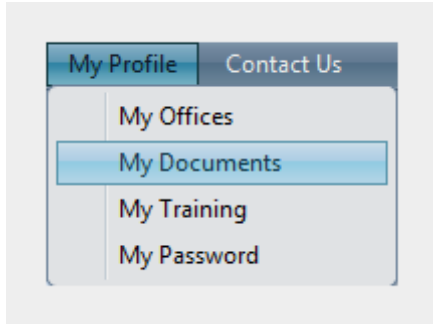
Office Information	Coverage Areas		
Select a State TX			
Select counties	Select cities	Select zipcodes	Zipcodes (74 of 60)
SCHLEICHER SCURRY SHACKELFORD SHELBY SHERMAN SMITH SOMERVELL STARR STEPHENS STERLING STONEWALL SUTTON SWISHER	ARP BULLARD FLINT LINDALE TROUP TYLER WHITEHOUSE WINONA	75701 75702 75703 75704 75705 75706 75707 75708 75709 75710 75711 75712 75713	71601 71602 71603 71901 71902 71903 71909 71910 71913 71914 71951 72002 72007

- To **add** the selected zip codes to your list **click** the single right arrow (→).
- **Click** the double right arrows (⇨) to add **ALL** zip codes in your area.
- To remove zip codes from your list:
- **Select** unwanted zip codes in the “My Zip codes” box and **click** the left arrow (←).
- Remove **ALL** zip codes by **clicking** the left arrows (⇦).

Note: If you would like to view the online “How to Video”, go to the Broker Portal FAQ page and select the “How do I manage My Offices?” video.

My Documents

- Hover over My Profile
- Click My Documents



This page is used for adding or updating required documents.

Upload a Document

Use this toolbox area to upload documents into the system.





Document Type:

Expiration Date:

Document:

MY REQUIRED DOCUMENTS




These documents and their associated (if applicable) expiration dates are required to be maintained by you on individual basis in order to maintain your status as an active broker with MMREM.

	Type	Document	Expiration Date	Uploaded On
	Certificate	Certificate.txt	05/05/2012	1/30/2012 10:43:00 AM
	E & O Insurance	EandOInsurance.txt	07/07/2012	1/30/2012 10:42:00 AM
	Diversity	Diversity.txt	07/19/2012	1/30/2012 10:43:00 AM
	Broker License	BrokerLicense.txt	04/04/2012	1/30/2012 10:42:00 AM

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The required documents are your E&O Insurance and Broker License.
The legend below explains the icons.

Legend

-  - This icon represents a document that has expired.
-  - This icon represents a document that will expire in less than 30 days.
-  - This icon represents a document that will not expire for more than 30 days.

Add new documents by **selecting** from the “Document Type:” dropdown menu.

Document Type:

Select...

- Select...
- E & O Insurance
- Broker License
- Diversity
- Certificate

Enter the “Expiration Date” manually or **select** it from the calendar.

Expiration Date:

December 2011

	S	M	T	W	T	F	S
49	27	28	29	30	1	2	3
50	4	5	6	7	8	9	10
51	11	12	13	14	15	16	17
52	18	19	20	21	22	23	24
53	25	26	27	28	29	30	31
1	1	2	3	4	5	6	7

Browse to **select** the document you would like to upload.

Document:

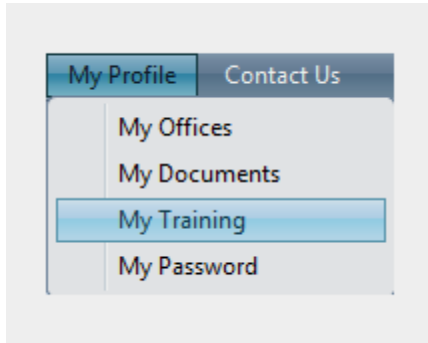
Now **click** “Upload”.

You may cancel the new document by **clicking** the cancel button.

File name:

Note: If you would like to view the online “How To Video”, go to the Broker Portal FAQ page and select the “How do I manage My Documents?” video.

My Training



- Hover the mouse on My Profile
- Click My Training

This page is used to view Training Records and to add new.

All previous Training events will show in this window with the:

- Title
- Date
- City
- State
- Geared Toward
- Number Attending
- Document

Title	Date	City	State	Geared Toward	Number Attending	Document
Broker Training	01/11/2012	Tyler	TX	Broker	50	MyTraining.PDF


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To **add** new training records go to the “Add Training” box.


Add Training

Use this toolbox to add training records.


Title:

Date:
 

City:

State:
CO 


Number Attending:

Gearred Towards:
Broker 

Supporting Doc (optional):

Enter the title.

Enter the “Date” manually or **select** it from the calendar.

Date:
 

February 2012

	S	M	T	W	T	F	S
5	29	30	31	1	2	3	4
6	5	6	7	8	9	10	11
7	12	13	14	15	16	17	18
8	19	20	21	22	23	24	25
9	26	27	28	29	1	2	3
10	4	5	6	7	8	9	10

Enter the City and **select** the State by using the drop down arrow.

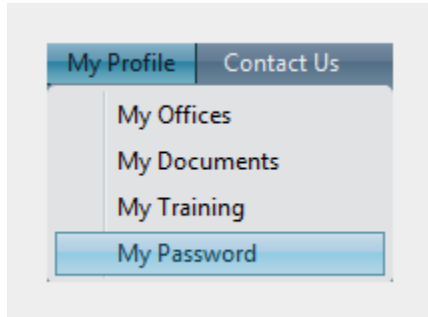
Enter the number attending the training.

Select the “Gearred Towards” by using the drop down arrow.

Now **click** “Select” to browse and choose the document. (The supporting document is optional.) **Click** “Add”.

Note: If you would like to view the online “How To Video”, go to the Broker Portal FAQ page and select the “How do I use the My Training page?” video.

My Password



- Hover on My Profile
- Click My Password

This page is used to change your password.

- Enter your old password into the “Old Password:” text box
- Enter your new password into the “New Password:” text box.
- Enter your new password again into the “Confirm New Password:” text box.
- To change your password click the “Change Password” button.
- To cancel changing your password click the “Cancel” button.

CHANGE PASSWORD

Use the form below to change your password.

New passwords are required to be a minimum of 6 characters in length.

Account Information

Old Password:

New Password:

Confirm New Password:

Note: If you would like to view the online “How To Video”, go to the Broker Portal FAQ page and select the “How do I change my password?” video.