

ADDING / DELETING LOAN OFFICERS AND BRANCHES

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Based on a training video by HUB

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- Only Account Administrators can Add or Delete a Loan Officer or a Branch on behalf of your Financial Institution
- If you have the permissions, log into the HUB Impact website with your unique login.
- For these items, you will be working from the Tools tab on the main page.

The screenshot displays the HUB Financial Services interface. At the top left is the HUB logo, followed by the text "HUB FINANCIAL SERVICES". Below this, it says "Current Product: Gap (Lender) - John Doe". A navigation bar contains five tabs: "Enrollments" (green), "Claims" (yellow), "Reports" (blue), "Tools" (grey), and "Logout" (orange). A black arrow points down to the "Tools" tab. Below the navigation bar, the "Enrollments" section is active, showing a table with the following data:

Insured / Vehicle	Waiver	Eff Date	Premium
A Claims Test 2025 Test Test	737478	1/10/2025	\$423.00

To the right of the table, a dropdown menu is open under the "Tools" tab, listing the following options: "Contact Information", "Downloads", "Account Notes", "Loan Officers", and "Branches". Two black arrows point to the "Loan Officers" and "Branches" options in the dropdown menu.

To ADD a Loan Officer

- On bottom left of Loan Officers screen, select **Add New** to add a new Loan Officer.

Account	Name	Allow Edit	Login	Edit	Delete
DEMO Lender Gap	Alecia Stevens	N			
DEMO Lender Gap	Amy Brians	Y			
DEMO Lender Gap	Bill Sims	N			
DEMO Lender Gap	Brandon English	Y			
DEMO Lender Gap	Carol Morgan	N			
DEMO Lender Gap	charles turner	N			
DEMO Lender Gap	Chuck Smart	N			
DEMO Lender Gap	Connely Wade	N			
DEMO Lender Gap	dustin able	N			
DEMO Lender Gap	dustin able	N			

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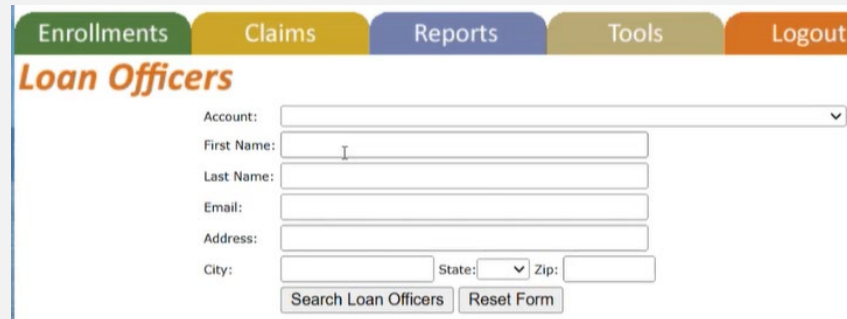
Account: DEMO Lender Gap
 Branch: Downtown
 Allow Edit: Yes
 First Name: Everett
 Last Name: Smith
 Employee ID:
 Email: everett.smith@yourdomain.com
 Password: esmith
 Force Password Update: No
 Password Expires: Yes
 Expires (# of Days): 90
 Phone: 999 999 - 9999 Ext:
 Fax:
 Address:
 Address Cont:
 City: State: Zip:

Save Changes Reset Form

- Once the Loan Officers screen populates, fill in the fields with your Loan Officer's information. Lines highlighted yellow are **required**
- Follow your Financial Institutions policies when entering information, but listed below are our recommended and optional answers for the fields required.
 - Allow Edit:** do you want to allow this Loan Officer the ability to EDIT any Gap claims they submit if a correction is needed?
 - Employee ID:** (optional) Use if you require this information at your Financial Institution for internal purposes.
 - PassWord:** enter an assigned password. HUB likes to use "first initial last name"
 - Force Password Update:** HUB recommends answering NO
 - Password Expires:** HUB recommends answering YES
 - Expires (# of Days):** HUB recommends answering with 90
- Click **Save Changes**
- The provided email when setting up this Loan Officer will be sent an email and this will also be their User Name when logging in. A separate email with the PassWord will also be generated.

To DELETE a Loan Officer

- Go to the Loan Officers page (from main page, go to Tools tab, Loan Officers from drop down menu)
 - On bottom left, select Search to locate the Loan Officer you are needing to remove.
- A page will open with searchable fields to conduct the Loan Officer search. You can use as many or as few to search.
- Click Search Loan Officers



The screenshot shows the 'Loan Officers' search page. At the top, there are navigation tabs: 'Enrollments' (green), 'Claims' (yellow), 'Reports' (blue), 'Tools' (grey), and 'Logout' (orange). Below the tabs, the title 'Loan Officers' is displayed in orange. The search form includes the following fields: 'Account:' (a dropdown menu), 'First Name:' (a text input field with a cursor), 'Last Name:' (a text input field), 'Email:' (a text input field), 'Address:' (a text input field), 'City:' (a text input field), 'State:' (a dropdown menu), and 'Zip:' (a text input field). At the bottom of the form are two buttons: 'Search Loan Officers' and 'Reset Form'.

- Once you locate the Loan Officer account that you wish to delete, click on the Delete icon (trash can).
- Confirm your selection to Delete by clicking OK when prompted.



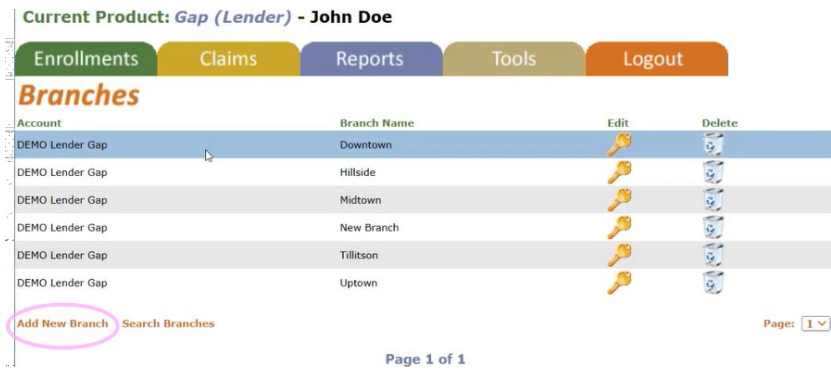
The screenshot shows the 'Loan Officers' list page. At the top, there are navigation tabs: 'Enrollments' (green), 'Claims' (yellow), 'Reports' (blue), 'Tools' (grey), and 'Logout' (orange). Below the tabs, the title 'Loan Officers' is displayed in orange. The table below has the following columns: 'Account', 'Name', 'Allow Edit', 'Login', 'Edit', and 'Delete'. The first row of data is: 'DEMO Lender Gap', 'Everett Smith', 'Y', a key icon, a key icon, and a trash can icon. Below the table are links for 'Add New' and 'Search'. At the bottom right, there is a 'Page: 1' dropdown menu.

Account	Name	Allow Edit	Login	Edit	Delete
DEMO Lender Gap	Everett Smith	Y			

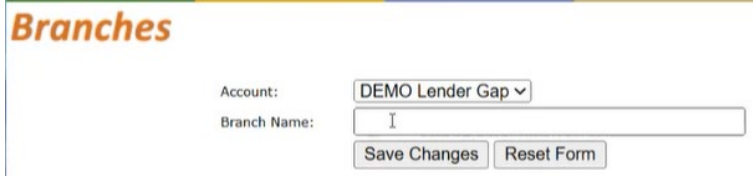
To ADD or DELETE a Branch

TO ADD A BRANCH:

- Go to Tools tab, select Branches from the drop down menu. Select **Add New Branch** in the lower left corner.



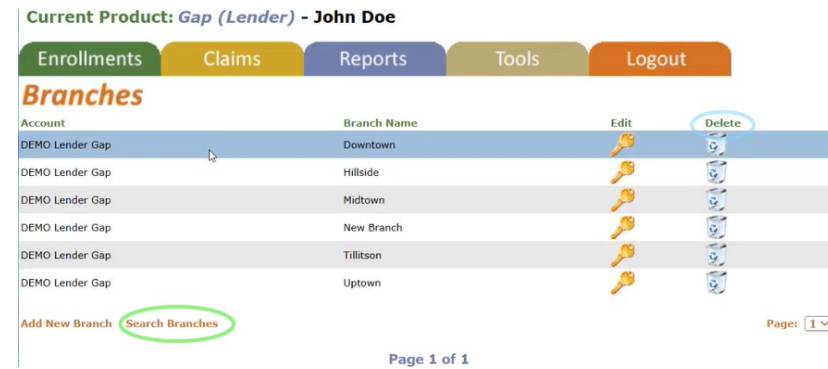
- On the Branches page, enter the Branch Name that you are adding.
- Click Save Changes



- Your newly added Branch will now live on the Branches Page (Tools tab, Branches listed in the drop down)

TO DELETE A BRANCH:

- Go to Tools tab, select Branches from the drop down menu. Select **Search Branch** in the lower left corner.



- Once you locate the Branch you want to delete, click on the **Delete icon** (trash can).
- Confirm your selection to Delete by clicking OK when prompted.

