



# Voya for Professionals

## New User Registration

The following slides will guide you through the New User Registration process for Producers and Key Office Personnel for accessing the Voya for Professionals website.

# Voya for Professionals Login Screen

**VOYA**  
FINANCIAL

**Voya for Professionals**

User ID  
  
[Forgot Your User ID](#)

Password  
 **Go**  
[Forgot Your Password](#)

**Need Assistance?**  
For assistance or other information related to Voya, please select one of the links below.

[log in help](#)  
[contact us](#)

**New to Voya?**  
Obtain your ID by clicking the link below.  
[request access](#)

**Need to be Appointed to Sell Voya Products?**  
[appointment request](#)

**Other Professional Logins**

**Employee Benefits**

[- Agents](#)

[Privacy Notice](#) | [Terms of Use/Online Privacy](#) | [Information Security](#) | [Insurance/Investor Disclosure](#)

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1. To register for the Voya for Professionals website, go to the login screen at:

<https://professionals.voya.com>

2. Click the **request access** link.

# Producer Access Request

## Request Access

[+ back to login](#)

### Request Access

Welcome to the Voya for Professionals website, a virtual office for agents, brokers and financial professionals. If you are already appointed with at least one Voya affiliated company or Broker-Dealer, you can request access to the Voya for Professionals Web site using this form.

**Please Note:** Requested information will be used for the sole purpose of granting you access to the Voya for Professionals Web site. Please read the [Privacy Notice](#) for more information. To protect your personal information, this form will be submitted in secure mode which will encrypt the information for transmission.

For questions on completing your registration request, please see the [New User's Registration Guide](#).

\*Required field

### Role

Association with Voya\*

Producer

### Personal Information

Your 9 Digit SSN\*

First Name\* MI Last Name\*

Email Address\*

### Login Profile

Please enter the User ID and Password you would like to use when accessing Voya for Professionals.

User ID\*

Note: ID must consist of a minimum of six (6) characters.

Password\*

Confirm Password\*

Note: your Password must meet the following requirements:

- Password must consist of a minimum of eight characters
- Password must NOT repeat a character more than 3 times
- Password must have at least one capital letter, one lower case letter and one numeric character or special character ( ! # \$ % & \* ( ) - \_ + " ' , . )
- Password must NOT consist of personal information (e.g. your own name, your date of birth, your telephone numbers, your company's name, your system ID or your account ID)

100000

1. As a Producer, you must enter **Your 9 Digit Social Security Number, First and Last Name, and Email Address.**
2. Enter your desired **User ID and Password.**
3. After completing all of this information, click **SUBMIT.**

# Producer Notification of Completed Registration

1. When Voya for Professionals receives the Producer's registration information, it is validated against Voya's licensing database.
2. When validation is complete, the requested **User ID** and **Password** are sent back to the Producer via email.

Welcome.  
Your request for access to Voya for Professionals has been granted. Voya for Professionals is brought to you by Voya and its affiliated companies and is designed to make it easier for you to do business with Voya and to help you raise your sales and productivity to new heights.  
Your username is listed below. Please make sure you note this somewhere as this is the only time your username will be communicated to you. For security reasons, your password will be sent via a separate email within a few hours.

Your username: AJohnson

You can use the credentials to log into the website at: <https://professionals.voya.com>.  
If you need any assistance, please don't hesitate to call 1-888-792-8476.

Welcome.  
Your request for access to Voya for Professionals has been granted. Voya for Professionals is brought to you by Voya and its affiliated companies and is designed to make it easier for you to do business with Voya and to help you raise your sales and productivity to new heights.  
Your password is listed below. For security reasons, your username will be sent via a separate email.

Your password: B@CX-8Hr

You can use the credentials to log into the website at: <https://professionals.voya.com>.  
If you need any assistance, please don't hesitate to call 1-888-792-8476.

# Key Office Personnel Access Request

## Request Access

[← back to login](#)

### Request Access

Welcome to the Voya for Professionals website, a virtual office for agents, brokers and financial professionals. If you are already appointed with at least one Voya affiliated company or Broker-Dealer, you can request access to the Voya for Professionals Web site using this form.

**Please Note:** Requested information will be used for the sole purpose of granting you access to the Voya for Professionals Web site. Please read the [Privacy Notice](#) for more information. To protect your personal information, this form will be submitted in secure mode which will encrypt the information for transmission.

For questions on completing your registration request, please see the [New User's Registration Guide](#).

\*Required field

### Role

Association with Voya\*      Email of Agent or Access Owner\*      Confirm Email\*

Key Office Personnel           

### Personal Information

Last 4 Digits of Your SSN\*

First Name\*      MI      Last Name\*

Email Address\*

Address\*      Address Line 2

City\*      State\*      Zip/Postal Code\*

XXXXX or XXXXX-XXXX

### Login Profile

Please enter the User ID and Password you would like to use when accessing Voya for Professionals.

User ID\*      Note: ID must consist of a minimum of six (6) characters.

Note: your Password must meet the following requirements:

Password\*      Confirm Password\*

- Password must consist of a minimum of eight characters
- Password must NOT repeat a character more than 3 times
- Password must have at least one capital letter, one lower case letter and one numeric character or special character ( ! # \$ % & \* ( ) - \_ = + \* \* . . )
- Password must NOT consist of personal information (e.g. your own name, your date of birth, your telephone numbers, your company's name, your system ID or your account ID)

1. Because Key Office Personnel (KOP) are not contracted producers, they cannot be validated against the Voya licensing database. KOPs are required to provide the **Last 4 Digits of their Social Security Number, First and Last Name, Email Address, Producer's Email Address** (or Organization Access Owner's Email Address) as well as their **Organization's Address**.
2. KOPs can also request their own **User ID** and **Password**.

# Key Office Personnel Notification of Access Request

## Request Access

Welcome. Your requested access to Voya for Professionals has been received. To complete the processing of your request, the agent for which you have supplied an email address will be contacted in order to initiate the last step of the process and activate your access. Once completed, you will receive an email notification indicating that your request has been completed.

Note: Professional Portal users must accept responsibility not to share login information and to protect the privacy and confidentiality of the information contained on this website.

Thank you for requesting access our site.

After submitting their registration, KOPs will be notified that their request has been submitted to their associated Producer (or Organization Access Owner) for activation.

# Activating Access: Producer Email

KOP Access Owner has requested Office Personnel access to Voya for Professionals under the User ID of KOOWNER. Please click on the link below to activate this access and select the functions you feel are appropriate for their role.

You will be prompted to enter your User ID and Password to access the Voya for Professionals website prior to being directed to the Delegation Management screen. Once you reach the delegation page, please enter the User ID above to add this user.

<https://professionals.voya.com/portal/secure/linkenabler?pageName=delegation.management.page.direct&portletName=voya.prof.portletinstance.profile.delegatemanagement.direct&action=/accessOwner&revised>

To see a quick How To video, please click on the following link:

<http://professionals.voya.com/us/mfvideo>

If you have further questions, please contact the Financial Application Support Team at (888) 792-8476.

Professional Portal users must accept responsibility not to share login information and to protect the privacy and confidentiality of the information on this website.

Thank you,

Voya Financial™

1. An email will advise the Producer that the KOP has requested access to the Voya for Professionals website on their behalf.
2. The Producer needs to click the **link provided** in this email in order to activate access for the requesting KOP.

# Producer Delegates Access

## Registration and Delegation Management

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**Note:** Voya™ requires that, at a minimum, you must perform a quarterly review of all your established delegate relationships to confirm that your delegates may only access customer information for which they have a business need.

You must immediately report any suspected misuse, privacy or security issues to your Voya representative. You are required to update your delegates' status immediately when there are any changes or issues.

Select the **\*Add Delegate\*** link to add delegates. Enter the delegate's User ID when the field appears and check the boxes for the functions you want them to access on your behalf. To update permissions of existing delegates, click the corresponding check box next to the name of the delegate.

Once you have made your selections, click the **\*Update Delegate Information\*** button to complete the process.

**Note:** If no check box is indicated next to the delegate's name, that delegate will be granted basic default delegation rights to view only content on your behalf.

For questions on delegation, please see the [Delegation Management Training Guide](#).

Delegates for: Test - SOMD

User ID	Name	Compensation / Incentives	Book of Business	Licensing / Contracting	Action
lfe core	Life Core	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<a href="#">Remove</a>
lfe5	LifeE LifeE	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<a href="#">Remove</a>
lfe6	LifeF LifeF	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<a href="#">Remove</a>

[+ Add Delegate](#)

UPDATE DELEGATE INFORMATION

1. From the email link, the Producer will be directed to the Voya for Professionals login screen.
2. After logging in, the Producer will automatically go to the **Delegate Management** screen.
3. Here, the Producer needs to click the **Add Delegate** link.



# Producer Delegates Access

## Registration and Delegation Management

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**Note:** Voya™ requires that, at a minimum, you must perform a quarterly review of all your established delegate relationships to confirm that your delegates may only access customer information for which they have a business need.

You must immediately report any suspected misuse, privacy or security issues to your Voya representative. You are required to update your delegates' status immediately when there are any changes or issues.

Select the **"Add Delegate"** link to add delegates. Enter the delegate's User ID when the field appears and check the boxes for the functions you want them to access on your behalf. To update permissions of existing delegates, click the corresponding check box next to the name of the delegate.

Once you have made your selections, click the **"Update Delegate Information"** button to complete the process.

**Note:** If no check box is indicated next to the delegate's name, that delegate will be granted basic default delegation rights to view only content on your behalf.

For questions on delegation, please see the [Delegation Management Training Guide](#).

Delegates for: Test - SOMD

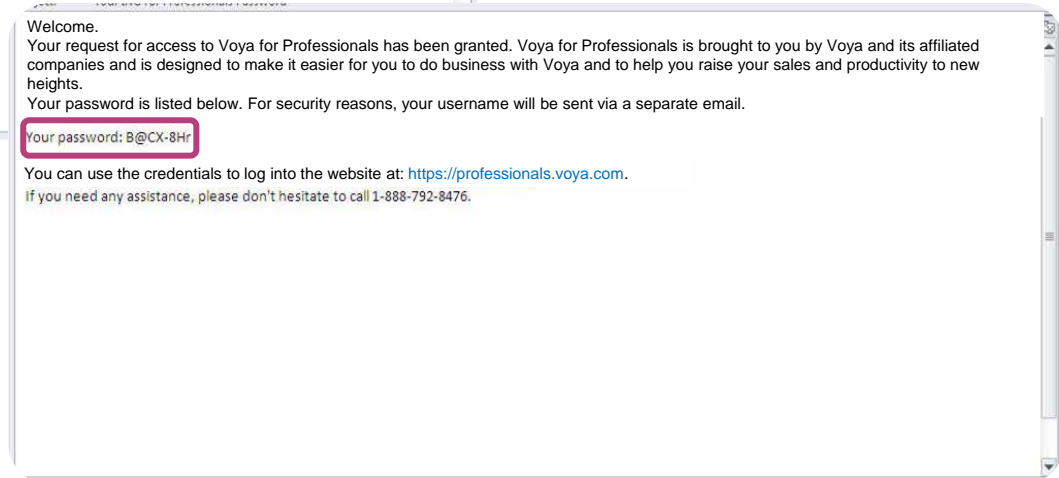
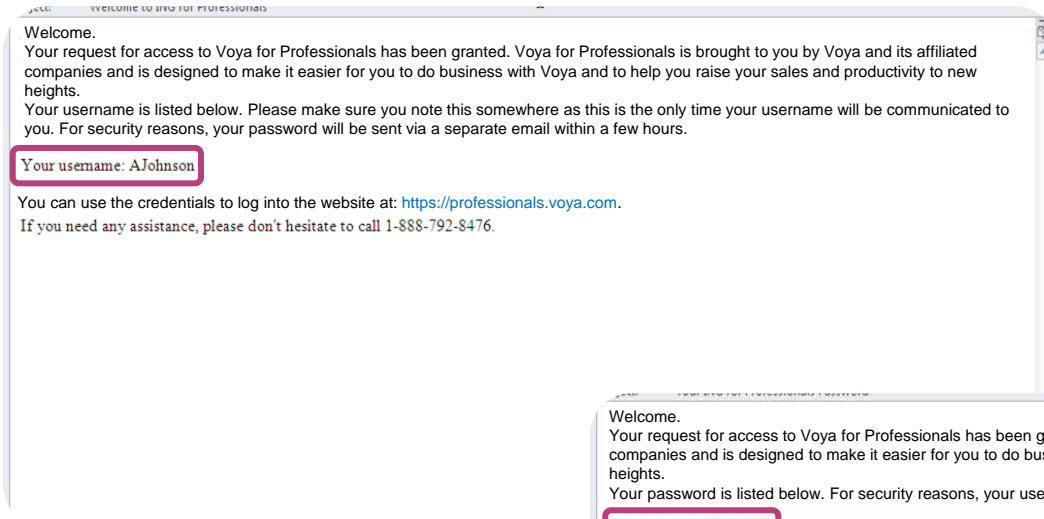
User ID	Name	Compensation / Incentives	Book of Business	Licensing / Contracting	Action
lfe core	Life Core	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<a href="#">Remove</a>
lfe5	LifeE LifeE	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<a href="#">Remove</a>
lfe6	LifeF LifeF	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<a href="#">Remove</a>
<input type="text" value="Enter User ID"/>		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<a href="#">Remove</a>

[← Add Delegate](#) [UPDATE DELEGATE INFORMATION](#)

1. The Producer needs to enter the **KOP's User ID** and then check the boxes under the business functions to which this KOP should have access.
2. When finished, the Producer needs to click the **Update Delegate Information** button.

# Key Office Personnel Notification of Completed Registration

The KOP's requested **User ID** and **Password** are then sent via email to the requesting KOP.



# Producer Manages Access For Their Delegates

Annuity & Asset | Life Insurance | Retirement & Rollover | **Test - SDMD** as another user | HWB | Contact Us | Logout

**VOYA** Financial™ your start

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**Profile Information**

[Back to home](#)

Required Fields \*

First Name:

Last Name:

Email Address \*:

Daytime Phone Number:

Address 1:

**NOTE:** Updating your address only affects your default shipping address for marketing materials fulfillment. Please fill out the appropriate paperwork to change your address of record.

Address 2:

Address 3:

City:

State:

Zip/Postal Code:

Registered Rep:

Default User for Site:

**NOTE:** Select a default user that will automatically load each time you return to the site.

Preferred Home Page:

[RESET](#) [SAVE CHANGES](#)

**Security Information**

- [Change Password](#)
- [Change Security Questions](#)
- [Unregister Device](#)

**Organization Access Owner**

- [Become an Organization's Access Owner](#)

**Registration and Delegation Management**

- [Manage My Delegates](#)

Producers may wish to grant access of their business data (i.e., delegate) to other members within their firm:

1. Click **Your Name** in the top right menu of Voya for Professionals to access your Profile Information.
2. Click **Manage My Delegates**.

# Producer Manages Access For Their Delegates

## Registration and Delegation Management

[+ back to my profile](#)

**Note:** Voya™ requires that, at a minimum, you must perform a quarterly review of all your established delegate relationships to confirm that your delegates may only access customer information for which they have a business need.

You must immediately report any suspected misuse, privacy or security issues to your Voya representative. You are required to update your delegates' status immediately when there are any changes or issues.

Select the **\*Add Delegate\*** link to add delegates. Enter the delegate's User ID when the field appears and check the boxes for the functions you want them to access on your behalf. To update permissions of existing delegates, click the corresponding check box next to the name of the delegate.

Once you have made your selections, click the **\*Update Delegate Information\*** button to complete the process.

**Note:** If no check box is indicated next to the delegate's name, that delegate will be granted basic default delegation rights to view only content on your behalf.

For questions on delegation, please see the [Delegation Management Training Guide](#).

Delegates for: Test - SOMD

User ID	Name	Compensation / Incentives	Book of Business	Licensing / Contracting	Action
lfe core	Life Core	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<a href="#">Remove</a>
lfe5	LifeE LifeE	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<a href="#">Remove</a>
lfe6	LifeF LifeF	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<a href="#">Remove</a>

[+ Add Delegate](#)

UPDATE DELEGATE INFORMATION

1. To change an existing user's business application access, simply check or uncheck the appropriate boxes for **Compensation / Incentives, Book of Business, or Licensing / Contracting**.
2. Click **Remove** to completely remove delegation for a specific user.
3. Click **Add Delegate** to add more delegates.

# Ability To 'Act As Another User'

The screenshot shows the Voya Financial Professional user interface. At the top, there are navigation links for 'Annuity & Asset', 'Life Insurance', and 'Retirement & Rollover'. The user's name 'Tina - SDA' is visible, and a purple box highlights the 'act as another user' button. Below the navigation is the 'VOYA FINANCIAL' logo and a search bar. The main content area is titled 'My Dashboard' and contains several sections: 'New Business' with a table of case counts and premiums, 'Inforce Business' with a table of policy counts, 'Inforce Policy Access' with search fields, and 'Policy Events (last 60 days)'. A 'Highlights' section on the right lists various resources like 'Voya Resource Avenue', 'Managing Director Rankings', and 'Life Product Avenue'.

	Pending	Approved	Issued	Active	Total
Current Case Count	65	38	21	0	124
Annual Premium	\$248,239.44	\$121,245.98	\$28,310.28	0	\$397,795.70
Target Premium	\$59.88	\$6,184.44	\$0.00	0	\$6,244.32

	IUL & UL	VUL	TERM	WHIL	TOTAL
Policy Count	0	0	0	0	0

Policy Events (last 60 days)  
No policy events to display.

1. Once access has been established, a delegate user can log onto Voya for Professionals and select **act as another user**. This enables the delegate to view the business information for the Producer who provided access.
2. When a delegate user is finished "acting as" a particular Producer, they can click **act as another user** again, and then select **Self**. Or, when they log off of Voya for Professionals and then log back in, they will again see their own data.

# Ability To 'Always Login As...'

The screenshot shows the VOYA Financial portal interface. At the top, there are navigation links for 'Annuity & Asset', 'Life Insurance', and 'Retirement & Rollover'. The user is logged in as 'Test - SDMD' and has a dropdown menu open for 'act as another user'. The dropdown menu lists several user profiles, with 'Always login as...' highlighted in a red box. Below the dropdown, the main dashboard is visible, featuring sections for 'My Dashboard', 'New Business', and 'Inforce Business'. The 'New Business' section contains a table with columns for 'Pending', 'Approved', 'Issued', 'Active', and 'Total'. The 'Inforce Business' section contains a table with columns for 'IUL & UL', 'VUL', 'TERM', 'WHL', and 'TOTAL'. There is also a search bar for 'Inforce Policy Access' and a 'Policy Events (last 60 days)' section.

	Pending	Approved	Issued	Active	Total
Current Case Count	65	38	21	0	124
Annual Premium	\$248,239.44	\$121,245.98	\$28,310.28	0	\$397,795.70
Target Premium	\$59.88	\$6,184.44	\$0.00	0	\$6,244.32

	IUL & UL	VUL	TERM	WHL	TOTAL
Policy Count	0	0	0	0	0

1. If a delegate user is constantly “acting as” a particular Producer, they may wish to select **Always login as...** from the **act as another user** dropdown, which will take you to the **Profile Information** screen.

# Ability To 'Always Login As...'

## Profile Information

[< back to home](#)

Required Fields \*

First Name

Last Name

Email Address \*

Daytime Phone Number

Address 1

Address 2

Address 3

City

State

Zip/Postal Code

Registered Rep

Default User for Site

Preferred Home Page

Test -
SDMD
voya.agent@voya.com
000-0000
Self
ANGELO SALCEDO-DP
Ann Core
CRUMP INSURANCE SERVS-DP
INGWriting LifeTwo1
Life Core
LifeDesign LifeFour
LifeE LifeE
LifeF LifeF
ret core
SANTA APARICIO-DP
siva001 NY
sophi07 george
Test - SDP
THE BURGESS GROUP-DP
TROY ALEJANDRE-DP
Vasanth J
Self

**NOTE:** Select a default user that will automatically load each time you return to the site.

[NEED?](#) [SAVE CHANGES](#)

## Security Information

- [Change Password](#)
- [Change Security Questions](#)
- [Unregister Device](#)

## Organization Access Owner

- [Become an Organization's Access Owner](#)

## Registration and Delegation Management

- [Manage My Delegates](#)

2. On the **Profile Information** screen, select the **Default User for Site** dropdown, and then click the **Save Changes** button.

Going forward, each time the delegate user logs onto Voya for Professionals, they will be “acting as” that particular Producer!



# Voya for Professionals

## New User Registration

If you need technical assistance on the Voya for Professionals website, please contact:

Financial Applications Support Team (FAST)

1-888-792-8476

[FAST@voya.com](mailto:FAST@voya.com)