

Assume Identity

You can invite other members from your office, such as a licensed assistant or a team member to log in and work in Paragon on your behalf.

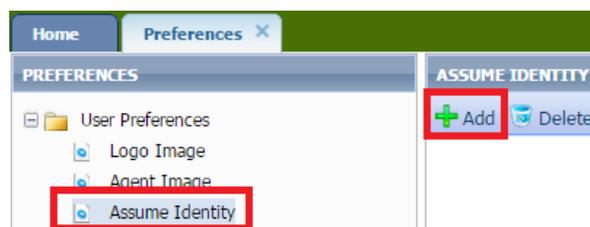
The invited user will 'assume your identity', and therefore have the same user class privileges as you. For example, if you are an office manager with office level privileges, the invited will also share your office level privileges.

To Invite a Member to Assume your Identity:

1. Once logged into Paragon, click **Preferences** located in the *Navigation Bar* and select **User**.



2. Under *User Preferences*, select **Assume Identity**. Click on **Add**.



3. Search for a member by entering their **First name** and/or **Last name**, in full or in part.



4. Select the member from the list and click **Save**.
 - Once you have selected the member who you are sharing your identity with, you should now see their name in the list below.

Search Begins With ▾

<input type="checkbox"/>	Name ▲	Active	User Code	Phone
<input type="checkbox"/>	Bob R Smith PREC*	Yes	V0242	

To Log in Using Another Members Identity:

This feature allows you to access the account of a member who has already set up their shared identity with you.

1. Once you have been invited to share an identity, log in normally using your own User ID.
2. Click **Assume Identity**.



3. Select the member you wish to sign-in as and click **Assume**.

Select agent to assume their identity [Assume](#) [Cancel](#)

<input type="text"/>	Contains ▾	Name ▲	User Code	Active	Type	Phone	Office
<input type="text"/>		Bob Smith PREC*	V0242	Yes	Unlicensed Ass	CONTC:	

Note: Save all information before changing identities

4. The Home page message bar will display the person whose identity you are sharing with.



To Return to Your Own Login:

1. Click Assume Identity.



2. In the window that opens, click **HERE** to return to your account.

Select agent to assume their identity or click [HERE](#) to return to your account

Search Contains

Name ↕	User Code	Active	Type	Phone	Office
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