

Purpose: This guide provides general guidance for viewing broker commission information on the Broker Portal and covers the following topics:

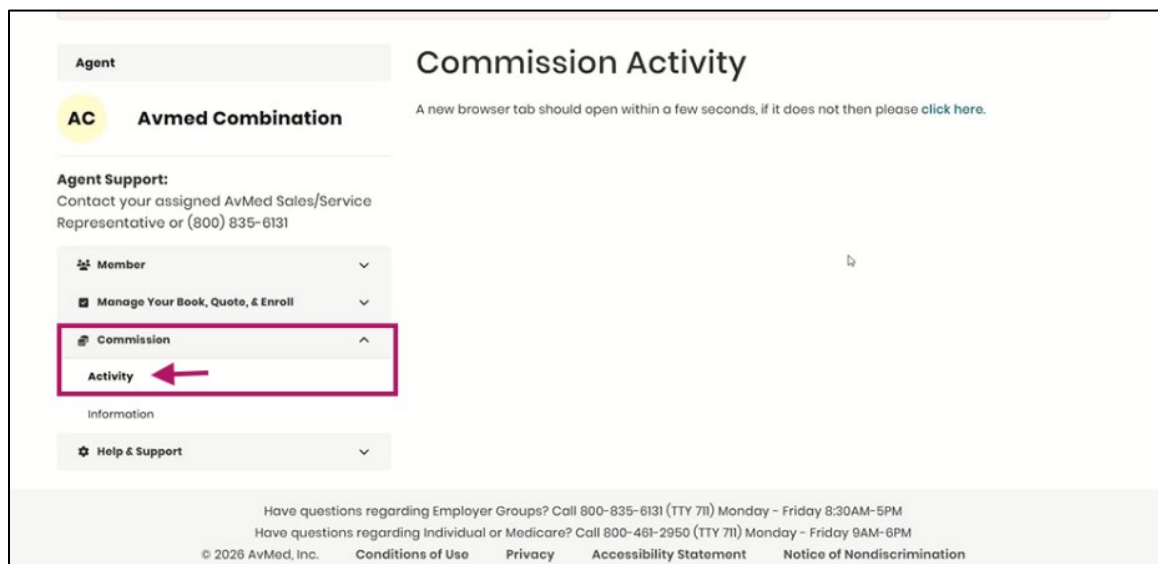
1. How to access Commission Activities and Information
2. Statements
3. Commission Details

Access and Availability Notice - Commission statements for Group, IFP, and Medicare issued through December 2025 will remain available in Callidus until September 30, 2026.

Navigation to Commission Activity

The link to access the Broker Commission information is accessed on the Broker Portal.

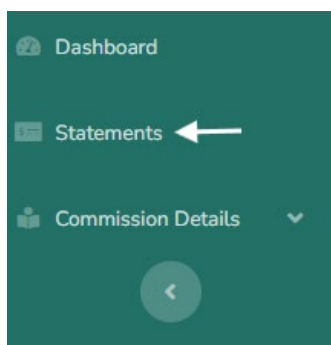
- Log into the Broker Portal
- Select **Commission**
- Click **Activity** to launch the application via SSO



Dashboard

The left side of the screen provides a list of the Menu of Options for additional details.

- Statements
- Commission Details



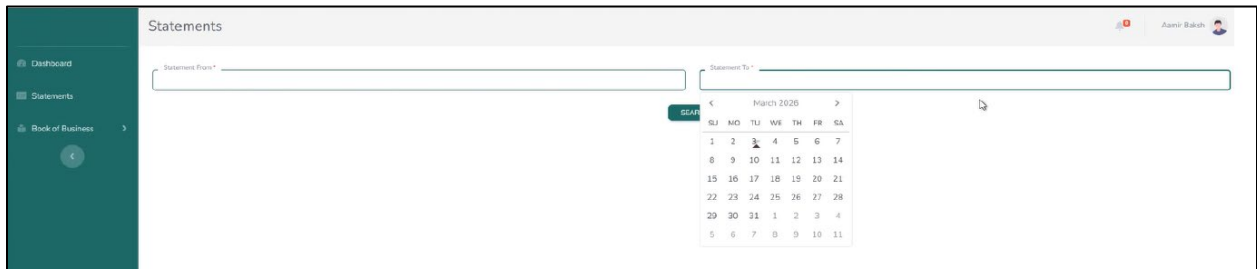
Statements:

Statements provide detailed information regarding commissions.

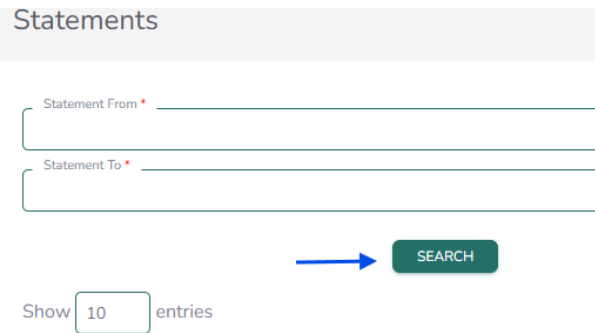
- Click the Statements option on the menu located on the left side of the screen to access the Statements search options.

Search Options:

- **Time Period** - You can search for statements during a certain period by entering the criteria in the search fields, or by selecting the dates in the calendar.



- **All Statements** - To display all statements, click the Search button – without using a date range.



- **Show Entries** – You can change the number of entry line items that are displayed.
- Click through the page numbers in the bottom right corner if there are multiple pages to view.

Excel	Stmt #	Description	Stmt Date	Payee	Credits	Debits	Balance	Amount	Pmt Date	Pmt Type
Excel	60	AVM SG and MEWA, February 2026 02/01/2026	02/01/2026	Solutions, Inc.	(Download to See Info)	(Download to See Info)	(Download to See Info)	(Download to See Info)		Paid to Agency
Excel	51	IFP February 2026 02/01/2026	02/01/2026	Solutions, Inc.	(Download to See Info)	(Download to See Info)	(Download to See Info)	(Download to See Info)		Paid to Agency
Excel	69	AVM SG and MEWA, January 2026	01/01/2026	Solutions, Inc.	(Download to See Info)	(Download to See Info)	(Download to See Info)	(Download to See Info)		Paid to Agency
Excel	49	IFP January 2026	01/01/2026	Solutions, Inc.	(Download to See Info)	(Download to See Info)	(Download to See Info)	(Download to See Info)		Paid to Agency

Showing 1 to 4 of 4 entries

Previous 1 Next

Commission Details:

- Commission Details – will only populate if you have an IFP book. The details are based on paid members only and may not reflect your full book of business.

Individual

Member First Name Member Last Name Policy ID

Group ID Agent ID Effective From

Effective To Status

SEARCH DOWNLOAD

Show entries Search:

Member ID	First Name	Last Name	Product	Start Date	End Date	Group	Agent ID	Agent Name
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