

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

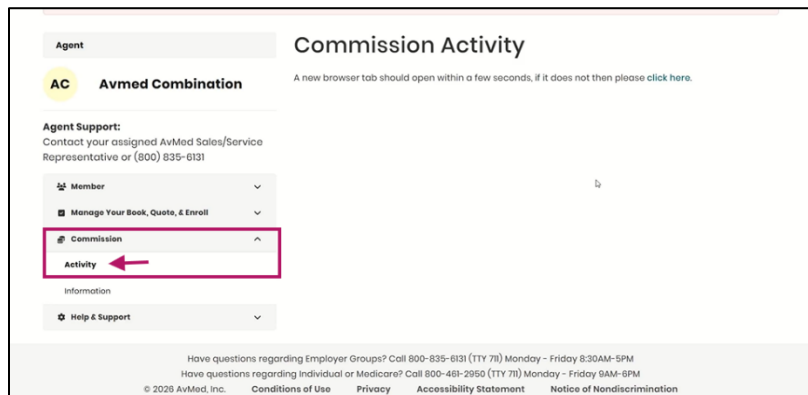
1. How to access Commission Activities and Information
2. Dashboard Overview
3. Statements
4. Commission Details
5. Agency View (Principal Agents Only)

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
- Choose **Statements** from the left menu



Dashboard

The Dashboard, or home landing page provides an overview of information in graph form for designated periods of time.

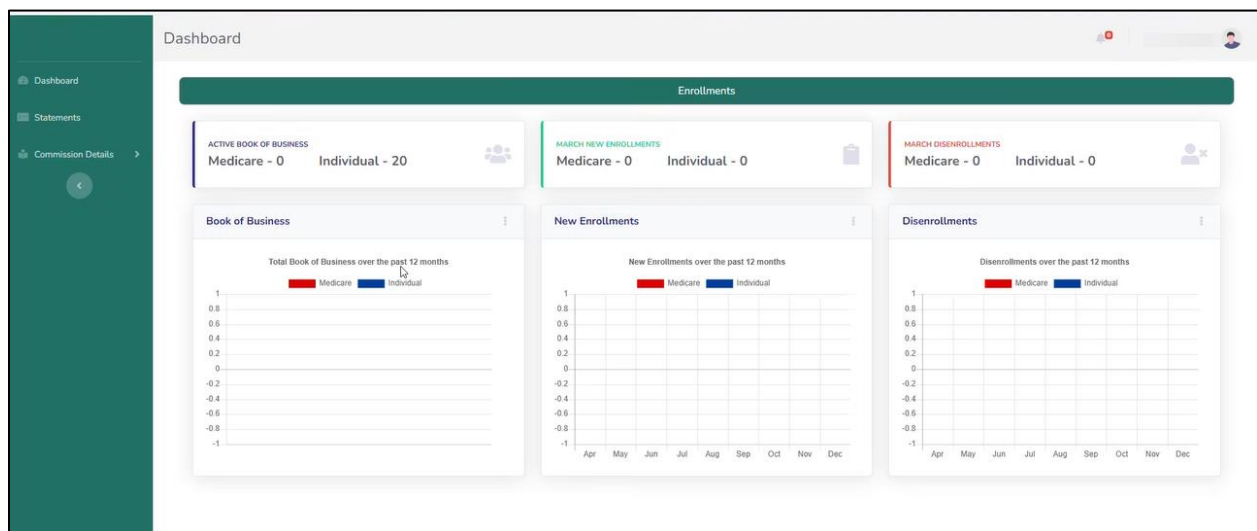
- Enrollments
- Statements
- Agency

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

- Dashboard
- Statements
- Commission Details

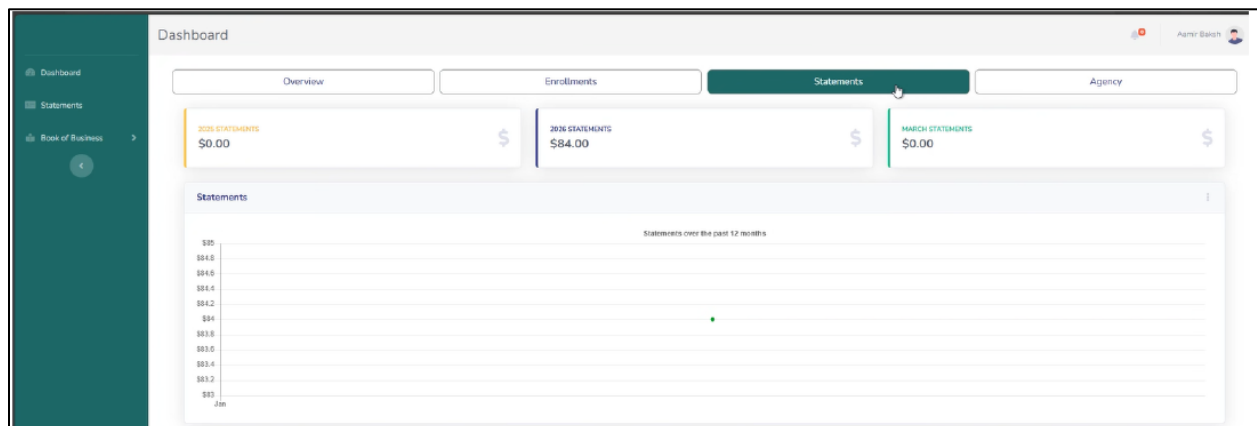
Enrollments:

Displays a graph view of Enrollments that occurred for the different Lines of Business during the designated time periods.



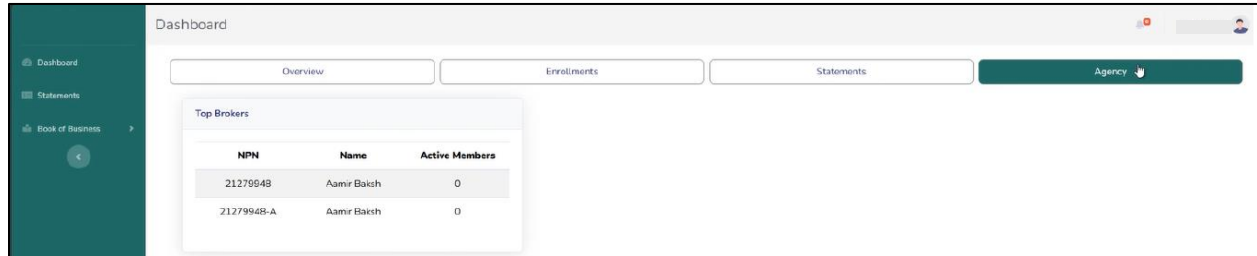
Statements:

Displays a graph view of statements during the designated time periods.



Agency Statements:

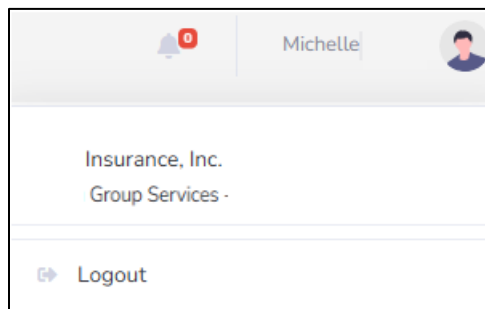
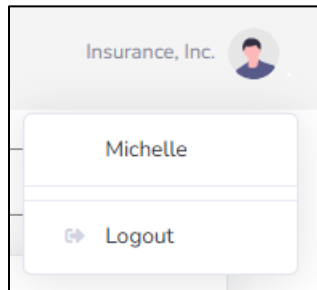
This displays a listing of the brokers who work under a Principal agent and their statement information for the designated time periods. Only the Principal agent can view information for each producer's commission information.



Multiple Agency Access

When a principal/primary agent has access to multiple agency dashboards, they can toggle between the views from their login icon in the top right corner.

To access the agencies, the agent has to toggle back to their own dashboard by first selecting their name and then they can select the different agency from the drop-down menu.



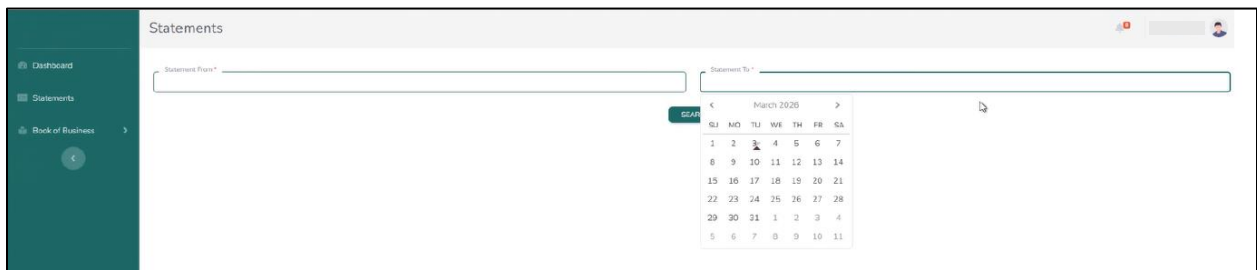
Statements:

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.

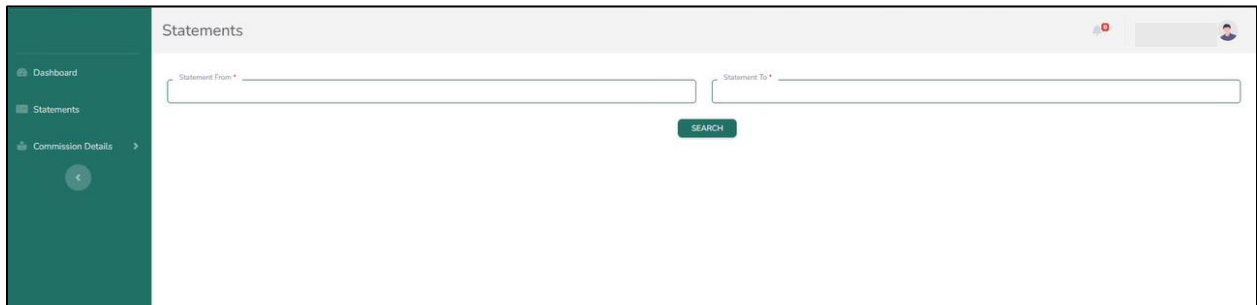
Search Options:

- **Time Period** - You can search for statements during a certain time 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.



The screenshot shows the 'Statements' page in a web application. On the left is a dark green sidebar with navigation links: 'Dashboard', 'Statements', and 'Book of Business'. The main content area has a header 'Statements' and two input fields: 'Statement From *' and 'Statement To *'. A green 'SEARCH' button is positioned between the fields. A calendar for March 2020 is displayed, showing days of the week (SU, MO, TU, WE, TH, FR, SA) and dates (1 through 31). The calendar is currently showing the month of March 2020.

Statements - Full Search:



The screenshot shows the 'Statements' page in a web application. On the left is a dark green sidebar with navigation links: 'Dashboard', 'Statements', and 'Commission Details'. The main content area has a header 'Statements' and two input fields: 'Statement From *' and 'Statement To *'. A green 'SEARCH' button is positioned between the fields. The calendar is not visible in this view.

Perform a full search by just clicking the search button – no date range is required.

- **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.



Broker Commercial Commission Guide

Commission Details

Dashboard

Statements

Commission Details

Statements

Statement From *

Statement To *

SEARCH

Show 10 entries

	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