



Genworth Pro - Commissions

Producer Reference Guide

*For Broker/Dealer/Agent use ONLY. NOT to be reproduced or shown to the public. **Please note:** This document does not contain any client confidential information.*

Version 1.1
147222 6/09/14

Last Updated: 6/09/2014
Author: Derek Jones

Contents

Introduction 1

Life and Annuity Commissions 1

 Navigation 1

 Life and Annuity Commissions Search 2

 Viewing Annuity and Life Commissions 3

Long Term Care Commissions 4

 Navigation 4

 Viewing LTC Commissions 4

EFT Information 5

 Updating EFT Information 5

Introduction

Genworth Pro offers a convenient and easy way for you to manage and view your commissions information. The purpose of this guide is to provide you with a quick reference as you navigate Pro across our Annuity, Life and Long Term Care product lines. Using Genworth Pro you can:

- View your Life, LTC and Annuity commission statements online 24/7.
- Search and access up to 2 years worth of your commissions statements.
- Download your commissions statements as a PDF file.
- Easily manage your Electronic Funds Transfer (EFT) accounts.

Life and Annuity Commissions

Navigation

To access **Life Commissions**:

- 1 Select the **Life Insurance** tab.
- 2 From the navigation bar, select **Commissions**.

The Commissions menu offers various options to view and manage your Life commissions:

- 3 Search for commission statements.
- 4 View commission rates per product line and dates paid.
- 5 View and update your EFT information.



To access **Annuity Commissions**:

- 1 Select the **Annuity** tab.
- 2 Click **Commissions**.



Life and Annuity Commissions (cont)

Life and Annuity Commissions Search

For Life and Annuities, selecting **Commissions** from the navigation bar opens the **Commissions – Online** search screen. To locate Life and Annuity commissions for a specific policy:

- 1 Enter the policy number in the **Policy #** field (Additional criteria is not required to run a search).

To search by an agent ID:

- 2 Select the appropriate company (GLAIC, GLIC or GLICNY) from the **Company** drop down box.
- 3 Select an agent ID or general agent (BGA) code. The names of these fields may vary (**Examples:** General Agent, Comm/Writing Agent, Paid To, Contract Holder).

In addition you may:

- 4 Set the **Commission Type** to “All” (default setting), “First Year” or “Renewal”.
- 5 Specify a time frame (Example: Last 30 days) using the **Period** drop down box.
- 6 Search for a specific date by using the **Statement Date** field.
- 7 Customize the fields displayed in the search results using **Custom Reports**.

Once the desired criteria have been entered:

- 8 Click **Get Results** to run the search.

The screenshot shows the 'COMMISSIONS - ONLINE' search interface. At the top right is a 'Go to Download' button. Below it are navigation links: Home, EFT, Update Profile, Tutorial, Contact Us, and FAQ. The 'Search Criteria' section is divided into two tabs: 'Variable Annuities and Life' (selected) and 'Fixed Annuities and Life'. The search form includes: a 'Quick Search' box for 'Policy #' (callout 1); a 'Company' dropdown menu set to 'GLICNY(AML)' (callout 2); 'General Agent' and 'Comm/Writing Agent' dropdowns (callout 3); a 'Commissionable Agent ID' field; 'Comm. Type' dropdown set to 'All' (callout 4); 'Period' dropdown set to 'last 15 days' (callout 5); and a 'Statement Date' field (callout 6). At the bottom, there are radio buttons for 'Standard Display Only' (selected) and 'Custom Reports' (callout 7). Finally, there are 'Get Results' (callout 8) and 'Clear Fields' buttons.

Life and Annuity Commissions (cont)

Viewing Annuity and Life Commissions

Once results have been returned for your commissions search:

- 1 Click **Custom Details** to view the commissions activity detailed in the statement.
- 2 Click **View Statement** to open a PDF of the commissions statement .

COMMISSION SUMMARY						
Home New Search EFT Update Profile Tutorial Contact Us FAQ						
GA ID - Statement Date: 45 09/15/2012 ▼						
[Records(1 to 11) of 11]						
GA/CH ID	Statement Date	Commission Agent ID	Company	Commission Total	Commissionable Premium Total	Statements and Reports
45	09/15/2012	45	GLAIC	\$1,505.73	\$77,393.81	Custom Details View Statement
45	09/15/2012	84	GLAIC	\$42.50	\$594.94	Custom Details View Statement
45	09/15/2012	81	GLAIC	\$24.00	\$350.00	Custom Details View Statement
45	09/15/2012	56	GLAIC	\$13.86	\$487.47	Custom Details View Statement
45	09/15/2012	83	GLAIC	\$9.90	\$311.00	Custom Details View Statement
45	09/15/2012	07	GLAIC	\$128.34	\$112.37	Custom Details View Statement
45	09/15/2012	82	GLAIC	\$18.88	\$20.00	Custom Details View Statement
45	09/15/2012	47	GLAIC	\$41.72	\$719.20	Custom Details View Statement
45	09/15/2012	03	GLAIC	\$23.61	\$1,180.73	Custom Details View Statement
45	09/15/2012	52	GLAIC	\$25.82	\$100.40	Custom Details View Statement
45	09/15/2012	96	GLAIC	\$45.22	\$419.00	Custom Details View Statement
				\$1,879.58	\$81,688.92	
[Records(1 to 11) of 11]						

Long Term Care Commissions

Navigation

To access Long Term Care Commissions:

- 1 Select the **Long Term Care Insurance** tab.
- 2 From the navigation bar, *select Commissions*.
- 3 Click **LTCI Commissions Summary**.
- 4 ***NOTE*** *Life and Linked Benefit* links to the **Commissions – Online** search screen used in *Life and Annuities*.



Viewing LTC Commissions

Click **LTCI Commissions Summary** from the **Commissions** menu to open a summary page that displays check history and summarizes year to date commissions activity.

- 1 Click the **PDF** radio button to view your statements as a PDF. ***NOTE*** *If you do not have this option your statements will open as a PDF automatically. You should only have this option if you are an agency (i.e. you have other producers below you in your hierarchy).*
- 2 The **Commission Summary** section displays your year to date commission total as well as the amount and date of your last check.
- 3 **Check History** displays your most recent commissions statements .
- 4 Click **View Statement** to access a PDF. On the next page, click **Download** to open/save the PDF.
- 5 To view older statements, *select* the week ending date from the drop down box under **Statement Archive**, then *click Go*.

The screenshot shows the 'LTC Commissions Summary' page. At the top, it displays 'Commissions Due Amount is \$ 5755.32' and 'Current as of Oct 04, 2012 12:00 AM PST'. There are radio buttons for 'Preferred Statement Format' with 'HTML' selected and 'PDF' selected (callout 1). The page is divided into two main sections: 'CHECK HISTORY' (callout 3) and 'COMMISSION SUMMARY' (callout 2). The 'CHECK HISTORY' table lists dates from 09/28/2012 to 08/10/2012 with amounts and 'View Statement' links (callout 4). The 'COMMISSION SUMMARY' table shows 'Current Balance' as \$ 5755.32, 'Year-To-Date-Earned' as \$ 568337.02, 'Last Check Amount' as \$15873.65, and 'Last Check Date' as 09/28/2012. Below this is the 'STATEMENT ARCHIVE' section (callout 5) with a 'Week Ending' dropdown menu set to '28-SEP-2012' and a 'GO' button.

EFT Information

Updating EFT Information

You can update your EFT information from the Commissions menu under the Life Insurance tab. Please note you can access this portion of the website even if you do not sell Life products. Please also be aware it takes two business days to process your request. To access EFT information:

- 1 Select **EFT** from the **Commissions** menu to open the **EFT: Register** screen.
- 2 Enter your social security number (SSN) or Tax ID number (TIN).
- 3 Click **Submit** to open the **EFT: Account Details** screen.



The screenshot shows the 'EFT: REGISTER' screen. It has a navigation bar with links for Home, Commissions Home, Update Profile, Tutorial, Contact Us, and FAQ. Below the navigation bar is the text 'Welcome to Electronic Funds Transfer for Commissions...'. There is a text input field labeled 'Please enter your SSN Tax ID :'. The input field is circled in red with the number 2. Below the input field is a 'SUBMIT' button, which is circled in red with the number 3.

If you have EFT accounts established with Genworth you can manage them from the **EFT: Details** screen:



- 1 If you need to update your bank account information, *click Edit Account Info* .
- 2 If you wish to stop transfers to a bank account, *click Stop EFT*.
- 3 If you want the account information to apply to all your other Genworth Agent IDs, *click* the box at the bottom of the screen and *click SUBMIT*.

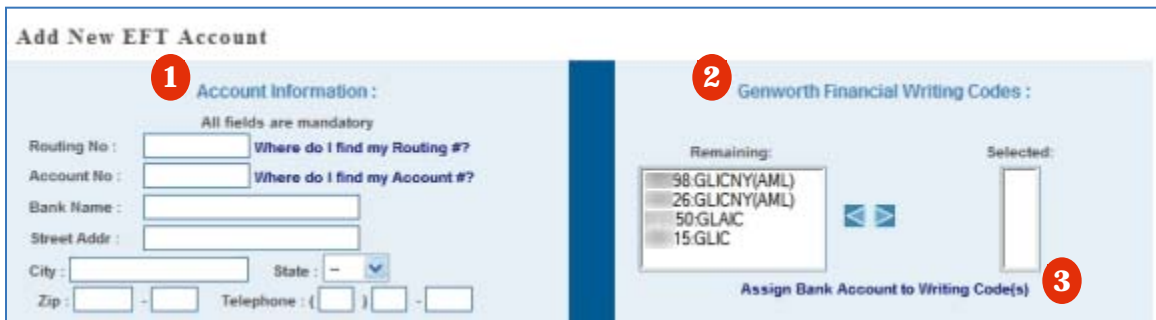
The screenshot shows the 'Add New EFT Account' screen. It has a section titled 'Existing EFT Accounts' with a table of accounts. The table has columns for Agent, Comp, Routing #, Account #, and Bank Name and Address. There are three rows of accounts. To the right of each row are links for 'Edit Account Info' and 'Stop EFT'. The 'Edit Account Info' link for the first row is circled in red with the number 1, and the 'Stop EFT' link for the second row is circled in red with the number 2. Below the table is a checkbox, which is circled in red with the number 3. To the right of the checkbox is a 'SUBMIT' button, which is circled in red with the number 3. Below the checkbox is the text: 'Click here if you want this authorization to apply to all of your Genworth business under this Tax ID Number (Check and click SUBMIT to Authorize. Uncheck and Click SUBMIT to Cancel Authorization.)'

EFT Information (cont)

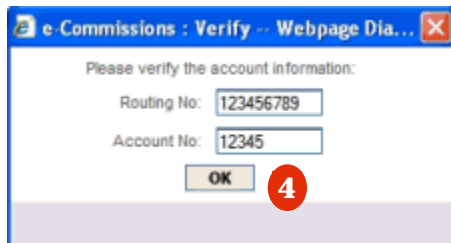
Updating EFT Information (Cont)

If you do not have a bank account associated with any of your Genworth Agent IDs for Commissions, the **EFT: Details** screen allows you to easily do so:

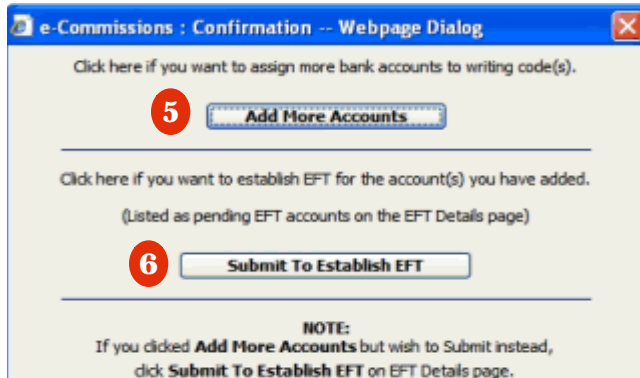
- 1 Enter your bank account information in the **Account Information** section.
- 2 Under the **Genworth Financial Writing Codes** section, *select* one or more agent numbers from the **Remaining** list and use the right arrow  to move your selections to the **Selected** list. Use the left arrow  to move selected items from the **Selected** list back to the **Remaining** list.
- 3 Click **Assign Bank Account to Writing Code(s)** to add the EFT Account. A confirmation pop-up window is presented.



- 4 Re-enter routing and account numbers for verification and *click* **OK**.



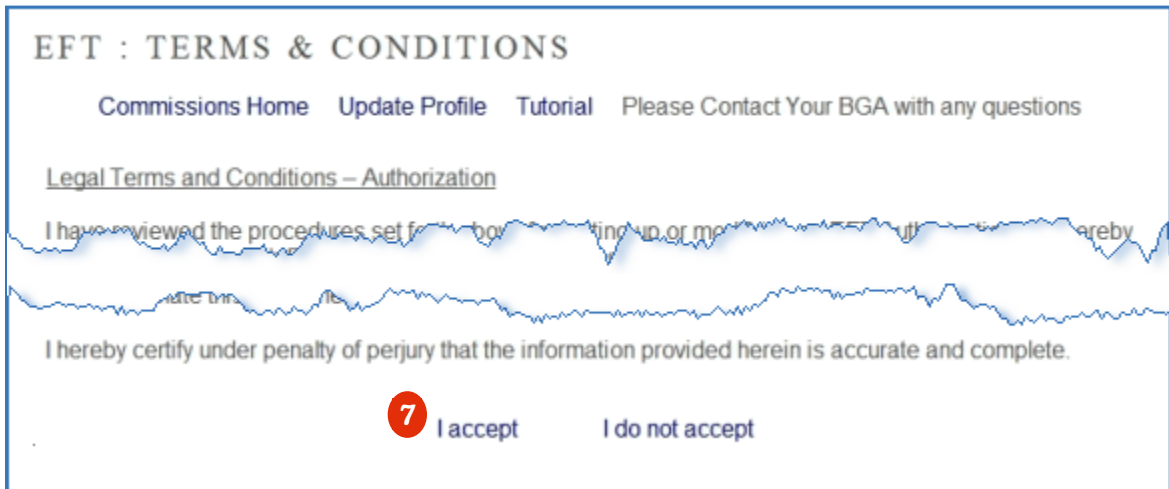
- 5 If more accounts need to be added, *click* **Add More Accounts** and repeat steps 1-4.
- 6 *Click* **Submit To Establish EFT** to confirm your additions.



EFT Information (cont)

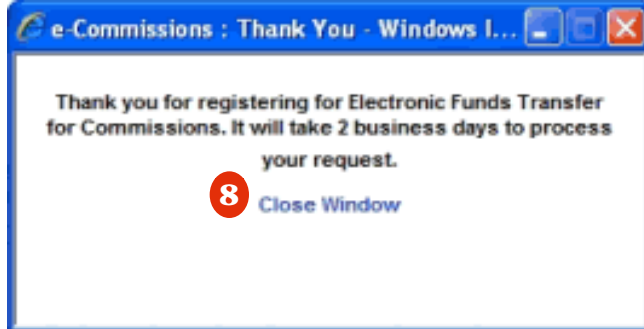
Updating EFT Information (Cont)

- 7** Read the Terms and Conditions and *click I accept* to continue.



The screenshot shows a web page titled "EFT : TERMS & CONDITIONS". At the top, there are navigation links: "Commissions Home", "Update Profile", "Tutorial", and "Please Contact Your BGA with any questions". Below this is a section titled "Legal Terms and Conditions – Authorization". The text reads: "I have viewed the procedures set forth for... hereby". Below this is a statement: "I hereby certify under penalty of perjury that the information provided herein is accurate and complete." At the bottom, there are two buttons: "I accept" and "I do not accept". A red circle with the number "7" is placed over the "I accept" button.

- 8** Click **Close Window**.



The screenshot shows a Windows window titled "e-Commissions : Thank You - Windows I...". The window contains the text: "Thank you for registering for Electronic Funds Transfer for Commissions. It will take 2 business days to process your request." Below this text is a button labeled "Close Window". A red circle with the number "8" is placed over the "Close Window" button.