Genworth

# Genworth Pro - Commissions

## Producer Reference Guide



**Version 1.1**
147222 6/09/14

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

# Contents

# 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:

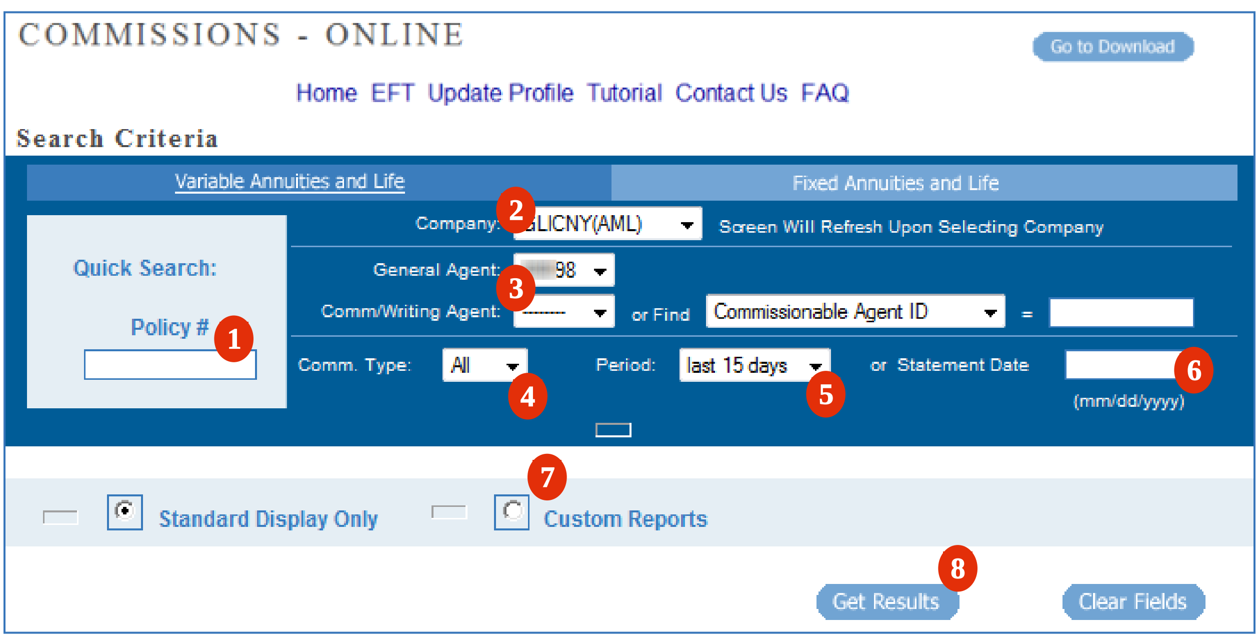
2 *Select* the appropriate company (GLAIC, GLIC or GLICNY) from the **Company** drop down box.
3 *Select* an agent ID or general agent (BGA) code. The names of these fields may vary (***Examples:*** General Agent, Comm/Writing Agent, Paid To, Contract Holder).

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.



## ***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

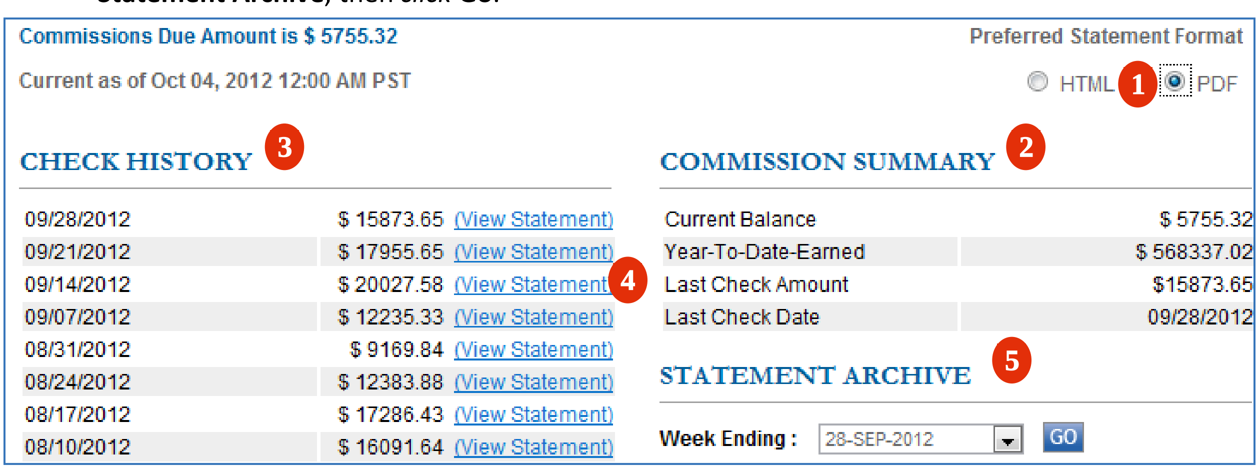
To access Long Term Care Commissions:

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**.

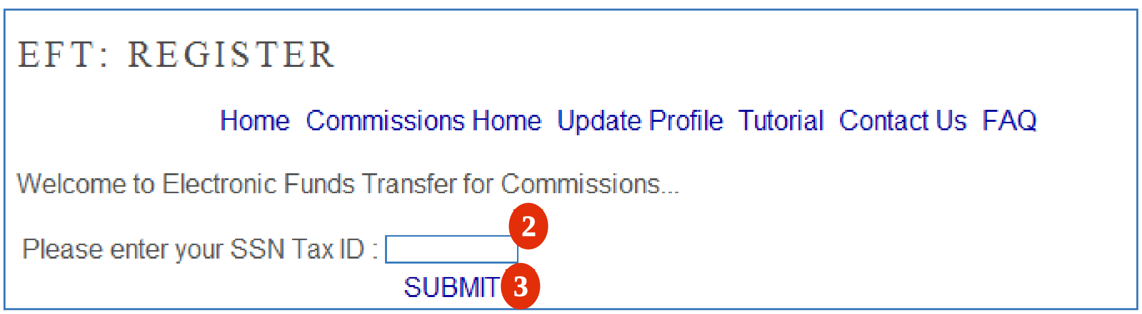


# EFT Information

### Updating EFT Information

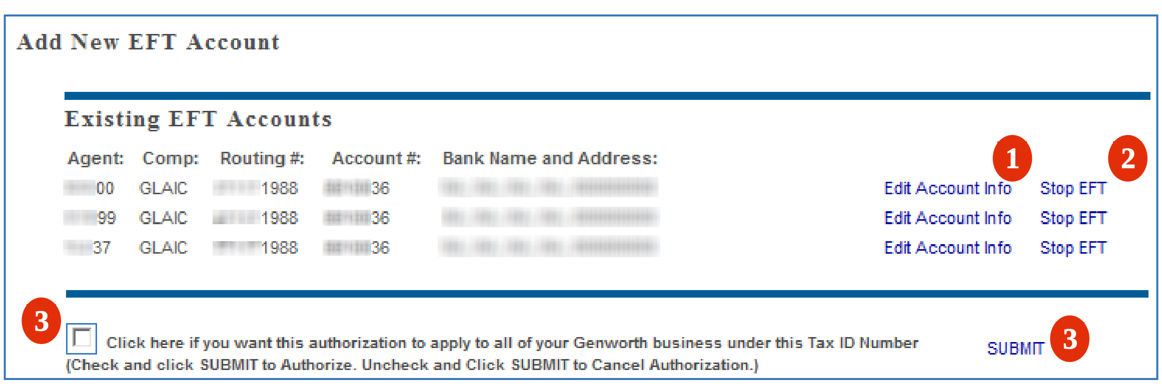
You can update your EFT information from the Commissions menu under the Life Insurance tab. Please note you can access this portion of the website even if you do not sell Life products. Please also be aware it takes two business days to process your request. To access EFT information:

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.


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.**

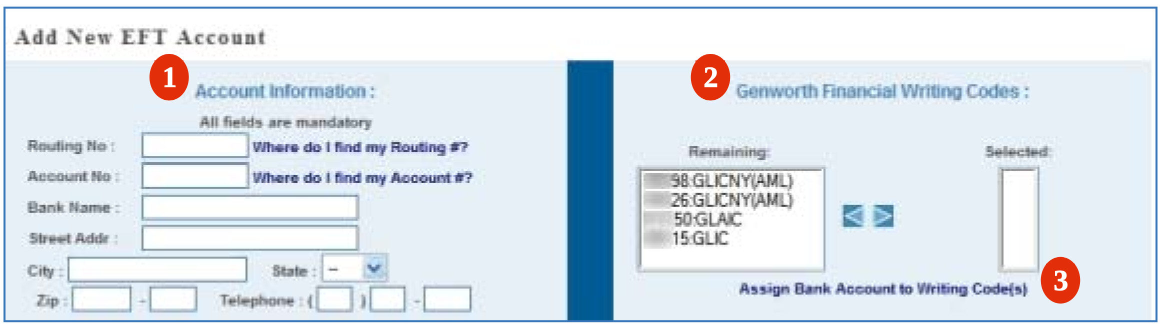


# ***EFT Information (cont)***

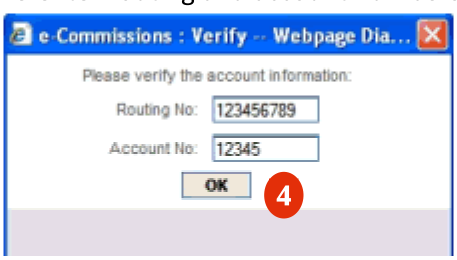
## *Updating EFT Information (Cont)*

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:

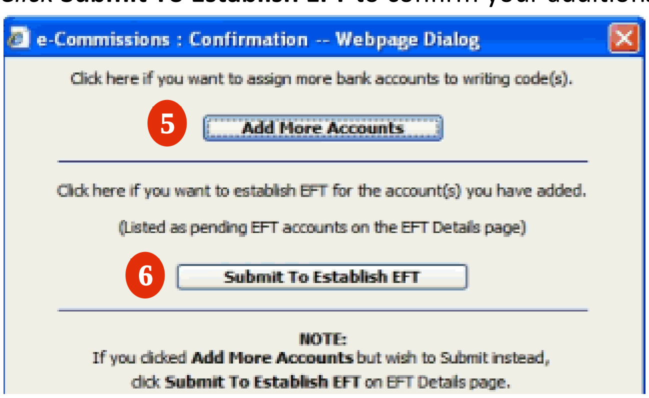
1. *Enter* your bank account information in the **Account Information** section.
2. Under the **Genworth Financial Writing Codes** section, *select* one or more agent numbers from the **Remaining** list and use the right arrow to move your selections to the **Selected** list. Use the left arrow to move 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.**



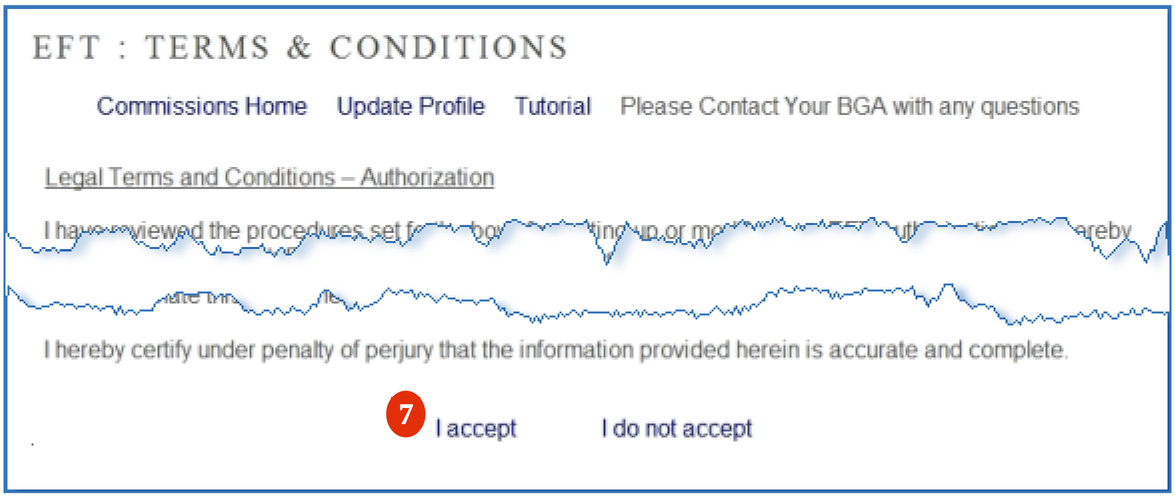

5. If more accounts need to be added, *click* **Add More Accounts** and repeat steps 1-4.
6. *Click* **Submit To Establish EFT** to confirm your additions.



## ***EFT Information (cont)***

### *Updating EFT Information (Cont)*

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




8 *Click* **Close Window.**