November 15, 2024

Agency Portal Features

Cal Mutual has expanded **Agency Portal Tools** to support Agency Administrators.

1. Assign an **Administrator** to your Agency. The Administrator will have access to the following:
   - **a. Agency Accounts**
     - i. Account View – View commission activity
     - ii. Commission Statements – View, Print, and Email commission statements
     - iii. Policy View – Look up a policy number and view when commission was posted and paid.
   - **b. Agency Users**
     - i. Add and close users
     - ii. View User Details
     - iii. Reset Passwords

Agency Portal – Administrator Manual

To access the Administrator features a designated person within your agency must be assigned as an Administrator as an Agent Type.

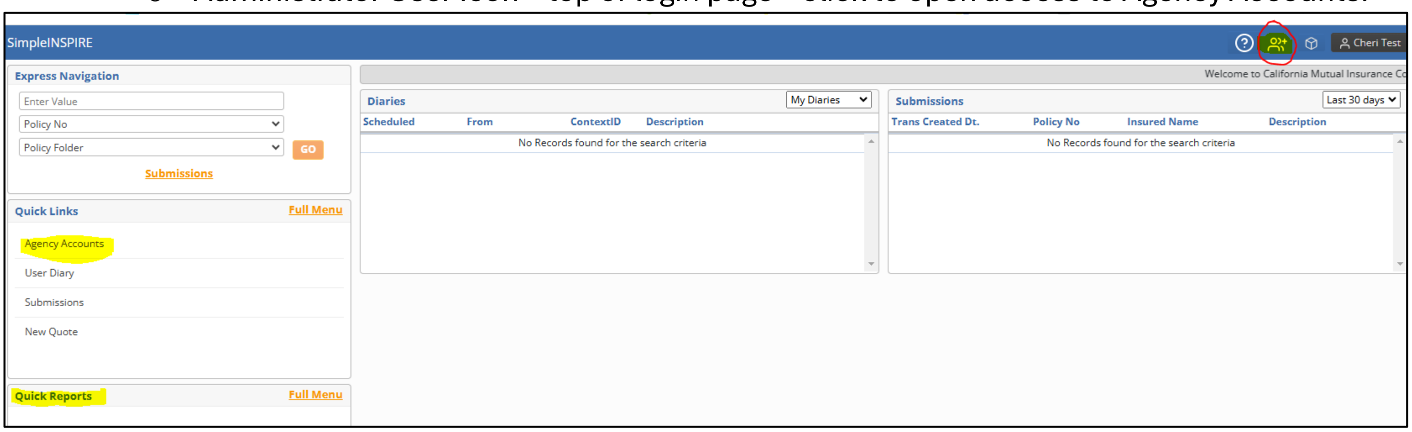
Once assigned, you will now have additional functions available to only Administrators. Administrators have the option of being assigned to more than one agency.

Contact Cal Mutual for assistance in assigning an Administrator to your agency(ies), by emailing Mary Soliven – msoliven@calmutual.com .

Administrator Login

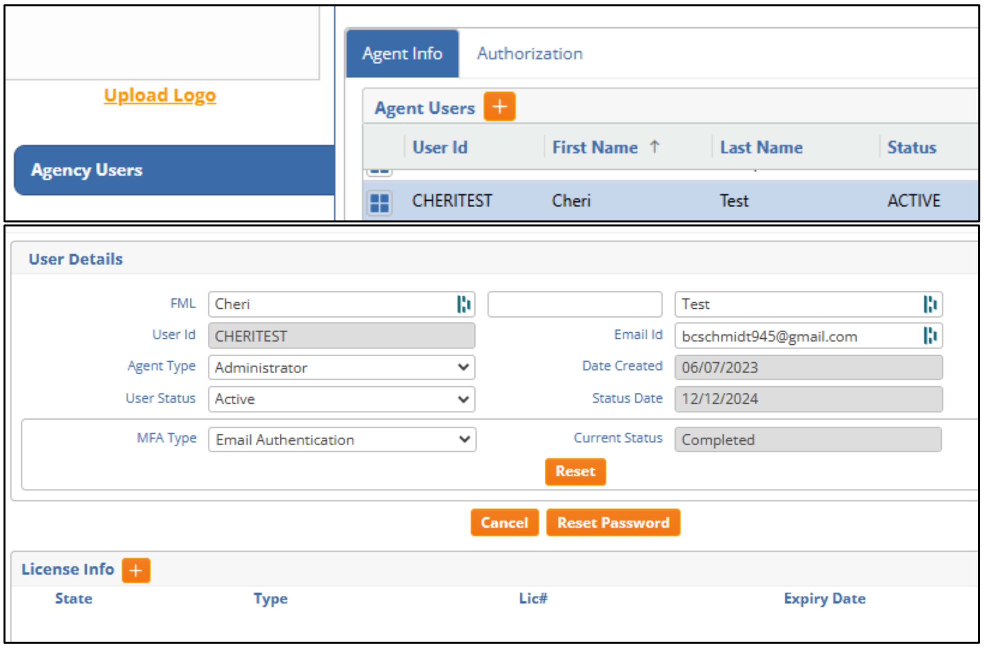
- Login with User ID and Password – MFA will be by Authenticator App or Email
    - Home Screen for Administrators

- **Quick Links and User Icon**
    - Quick Links - Agency Accounts – Commissions
    - Administrator User Icon – top of login page – click to open access to Agency Accounts.

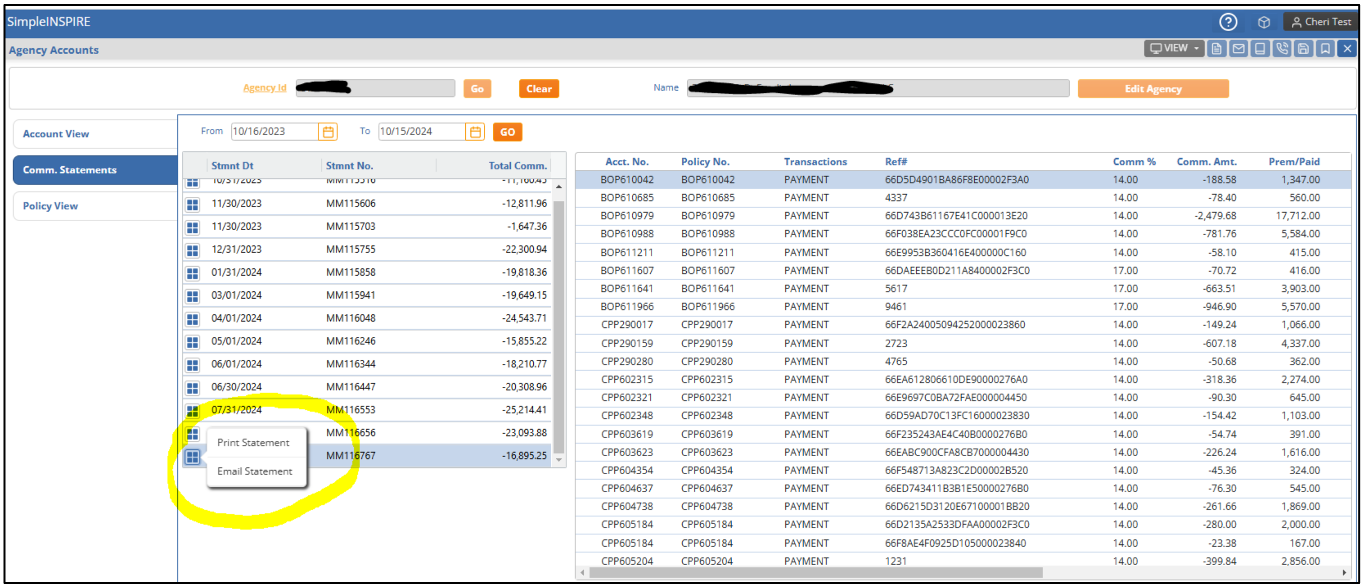


- **Administrator – Add/close users**
    - Click on the Administrator User Icon at the top right of the page.
    - Click on the Agency Id at the top left and the list of agencies will populate. Select Agency ID and the Agency Maintenance will open. (If you Administer more than one agency, all authorized agencies will populate - select Agency)
    - **To add a user**, select the + sign to the right of Agent Users Column.
        - Enter the detail for the user, including:
        - Name
        - User ID – (firstlast name – no spaces) i.e if name is Jane Doe, user will be JANEDOE
        - Email Address
        - Agent Type from drop down list
        - MFA Type – Multi Factor Identifier can be Microsoft Authenticator or Email Address
        - License Information, if licensed
    - Enter Authorization Products by selecting “Authorization” to the right of Agent Info header

        - Select Authorized Products for user – NB
    - Save and Close – user will receive an email to complete the registration
    - **To Close a User**, select the user and in the User Details, change the User Status to “Closed”.



- **Agency Accounts**
    - Click on Agency ID and select Agency – Go you may have more than one if you are assigned to more than one agency.
    - Account View will populate with Commission Activity based upon filters
        - Agency Statements – date, reference number, credit amount and account balance.
        - Refund – date, check number, debit amount and account balance.
    - Comm Statements
        - The default filter date is one year from the current date. Update filter as needed.
        - The left window lists the commission statements by statement date.
        - Select commission statement and right window will populate with policy transactions within the statement.
        - Click on the dice next to statement date to open options to print the statement or email the statement.



- Policy View – to view commission activity on a specific policy number, enter the policy number, select GO, and detail will appear providing the detailed payments on the policy, including insured commission payment dates, commission base, commission percentage and commission paid.