



## **Agent Resources for Commission Statements: Commonly Asked Questions:**

### **1. When are the commission emails sent?**

Commission emails are usually sent during the first week of the month and they are for the previous month (i.e., Commission payments received in November are for commission for the month of October)

### **2. Who sends the commission emails?**

Commission emails are sent by

[CaliforniaMutualInsuranceCompany@smart-disburse.com](mailto:CaliforniaMutualInsuranceCompany@smart-disburse.com), please make sure our email is not blocked, otherwise emails will not arrive to your inbox.

### **3. Who is receiving the emails?**

Commission emails are sent to the email that we have on file for Commission Statements (if you would like to know who we have on file for your agency, please email us at [frontdesk@calmutual](mailto:frontdesk@calmutual) OR call us at (831)637-5824)

### **4. How long do I have to process the payment?**

After initial emails are sent out, agencies then have **10 days** to process their payment, and you will be receiving daily reminders until you process your payment. After 10 days, the link to the payment will expire and a check will automatically get sent out.

### **5. I forwarded the email to the correct person who manages our commission statements, why can't they open the link and process the payment?**

The commission email **cannot** be forwarded as our system only allows the person that we have on file to open the link and process the payment, if the commission information is incorrect, please call or email us.

### **6. A blank spot is popping up in the email and will not let me click on the link, what can I do?**

There might be an issue with your browser or firewall which could cause the link to be blocked. If you have an IT department, please contact them to see if they can help unblock the firewall or please use the link below to help.

<https://learn.microsoft.com/en-us/troubleshoot/outlook/message-body/hyperlinks-not-working-in-outlook>

### **7. What is my agency code? I'm not sure and I only have 3 attempts.**

If you are unsure what your agency code, please look at previous commission statements and look for the "**Agency Account No:**" and input only the letters given, usually the agency code will be in all caps OR give us a call at (831)637-5824 and ask for the agency code.

You are given **3 attempts max**, after that your payment will be cancelled and you will have to email or call us to reissue the payment. If you have any questions, please do not hesitate to ask.

**8. I received an email saying that my link expired, what does this mean?**

If you received an email saying that your link expired, this means that the payment was not processed within the 10-day window. After 10 days, payment emails expire at 12AM EST (9PM PST) and therefore a check will automatically be sent out. Payments cannot be reissued as a check has already been sent. Commission statements are **not** sent along with the commission payment.

**9. I received a check in the mail, but no commission statement.**

If you received a check in the mail, this means that the link had expired on the commission email and a check was automatically sent out, however, a commission statement will **not** be a part of the check.

**10. I forgot to download the commission statement; can I get a copy of it?**

While you cannot go back to the email to get the commission statement, please refer to the administrator manual where your agency account administrator can download the commission statement themselves in SimpleInspire or you may contact our Front Desk.

**11. Could you send me a check or make a deposit via ACH?**

Yes, starting July 1<sup>st</sup>, agencies can now save the method of payment rather than having to select a payment method for each commission statement. On the “One Final Step” screen, there will be a box that allows Transcard to store and use the payment method of choice. This permission can be revoked at any time. Please be aware, that because payments will automatically be sent out, commission statements **will not** be a part of the email. Refer to question 10.

**12. What if there is no agency administrator for our agency to retrieve our commission statements?**

If your agency does not have anyone assigned as the agency administrator, please call or email us so that we can create a login for them to our Cal Mutual portal so that they can retrieve commission statements moving forward.

**For a step-by-step tutorial on how to process your commission statement, please see our Agency Commission Guide.**

**If you have any other questions, please do not hesitate to reach out to us at (831)637-5824 or email us at [frontdesk@calmutual.com](mailto:frontdesk@calmutual.com)**