

Welcome to the Broker Portal User Guide

This User Guide was created to help anyone who will be working with the Broker portal. Throughout the guide, please be aware of these references:

Here is a list of symbols that you will see in the Guide:



Delete



Phone Number



Email Address



Print



Fax



Social Media



Drop Down Menu



Settings

Please Note: When in the portal, you may come across boxes that are greyed-out. This indicates information that cannot be edited.

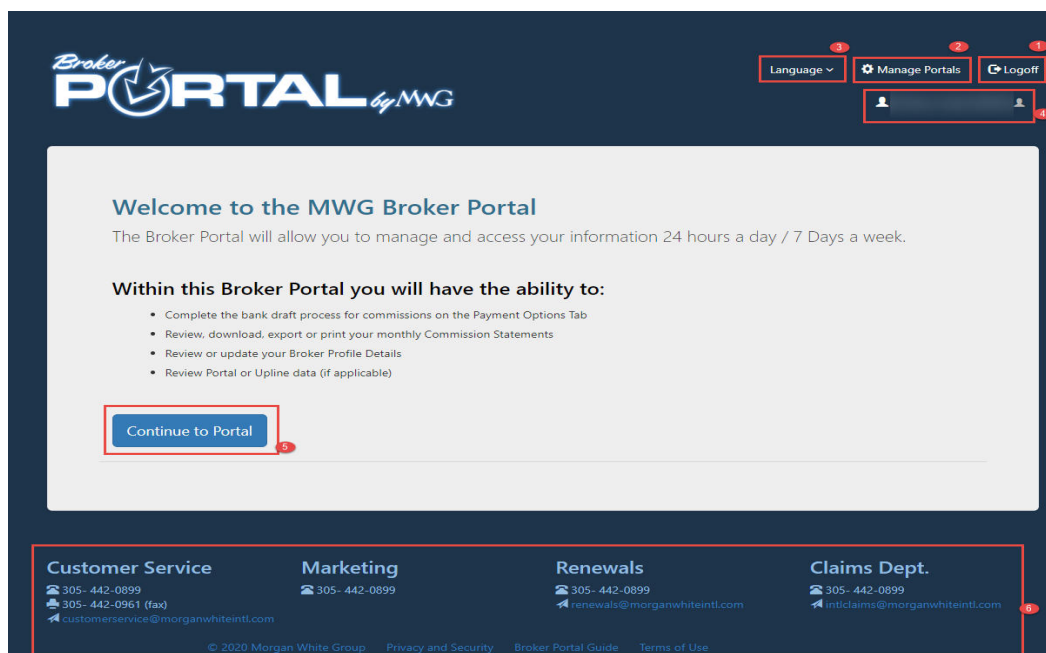
Agent#

22566

Reminder- You can access the Broker Portal User Guide or FAQ at the bottom of the website at any time.

The Broker Portal URL: brokers.morganwhiteintl.com

Upon entering the Broker Portal, the first thing you will see is the landing page.



The screenshot shows the MWG Broker Portal landing page. At the top right, there are links for Language, Manage Portals, and Logout. Below these is a username field. The main content area welcomes the user and lists capabilities: completing bank drafts, reviewing commission statements, updating profile details, and reviewing portal/upline data. A 'Continue to Portal' button is at the bottom. The footer contains contact information for Customer Service, Marketing, Renewals, and Claims Dept.

1. Logout Link-Click to log out of the portal.

2. Manage Portals- Here is where you can change your email or password.

3. Ability to switch languages from English to Spanish

4. This is your Username

5. Click here to enter the Broker Portal

6. Contact information

Broker PORTAL by MWG

Create a New Account

User Name

Email

Password

Confirm Password

Next

Broker PORTAL by MWG

Associate an Agent

To complete your enrollment to the MWG Broker Portal we need to associate your MWG Agent identity. Please fill out the following form and we will retrieve this information.

Email

AgentNumber

Search Require Assistance?

To Register for the First Time

If you are registering for the first time, click the “Click Here” button to create a new account. The second screen will request your email address and agent number to validate the account.

If you receive multiple error messages, please contact your designated representative to assist with registering more than one portal in our system.

To Log in:

Click the “Log In Here” button to log on as an existing user. Enter your information and click “Log In”

To Reset your Password

MWG PORTALS

Reset My Password

You can reset the password for your MWG Web Portal account by providing some information. Shortly after clicking “Reset Password” you will receive an email at the email address associated with your user Id. This email will contain a link allowing you to generate a new temporary password.

Enter Your User Name or Email Address

Send Reset Password Link

© 2016 MWG Web Portals Return to Login

If you forget your password, click the “Forgot Password” Link. Enter your email or username and click “Send Reset Password” link.

Your username must match the email address used in the initial registration. If you receive an error message when you attempt to log in, try another email address you may have used when you first registered in the portal. Once you enter the correct username/password, an email will be sent to that email address. This will grant you access and provide instructions on resetting your password.

Inside the Portal

Once inside the portal, there are a few things to make note of here. First, the tool bar of options is located on the left hand side of the screen. Once a tab is clicked, the information will appear in the white area next to the tool bar.

The screenshot shows the 'Broker Profile' page. On the left is a vertical toolbar (1) with links: Broker Contacts, Broker Profile (selected), Downline, Broker Contacts, Commissions, View Statements, Production, Individual, Individual (Terminations), Group, Training, and Forms Library. The main content area is titled 'Broker Profile' (3) and contains three sections: 'Agent Info' (2) with fields for First Name, Middle Initial, Last Name, Birthdate, and Agent #; 'Company Info' (3) with fields for Company Name, Address, and an 'Add an Address' button; and 'Contact Info' (4) with a table for Phone Numbers (Type, Number, Ext), Email Address, Website URL, and CC Email Address. Below these is 'Payment Info' (5) with a list of payment methods and their minimums, and 'EFT Direct Deposit Info' (6) with a field for the account number and a checkmark. At the bottom left is a 'Save Agent Info' button (7).

Type	Number	Ext
Edit Work		
Edit Mobile		
Edit Work		

EFT Direct Deposit Info	
*****620	✓

1. Toolbar
2. Agent Information
3. Company Information
4. Contact Information
5. Banking Information
6. Add a Payment Method
7. "Save" Information Button

The Broker Portal is broken down into categories:
Broker Contact, Commissions, Quoting and Enrollment, Production, and Training

If you click the "Broker Profile" link in the toolbar, there are two things you can accomplish:

- 1) Edit or complete broker demographics.
- 2) Enter or edit a payment method for commission deposits.

Broker Contacts Tab

The screenshot shows the 'Broker Contacts' tab in a web application. On the left is a sidebar with navigation links: Broker Contacts (selected), Broker Profile, Downline, Commissions, View Statements, Production, Individual, Individual (Terminations), Group, Training, and Forms Library. The main content area is titled 'Broker Contacts' and contains an 'Add Contact' button (callout 1). Below this is a table of contacts with columns: Contact Name, Email, Phone, and Actions. The table lists 10 contacts, each with an 'Edit Access' button (callout 2). At the bottom of the table is a pagination section with a 'Show 10 entries' dropdown (callout 4) and a set of navigation buttons: Previous, 1, 2, 3, 4, Next (callout 3).

Contact Name	Email	Phone	Actions
Judy Blaine	judy.blaine@morganwhite.com	601-955-1642	Edit Access
John Boyn	test@morganwhite.com	123-456-4455	Edit Access
Rebecca Cooper	rebecca.cooper@morganwhite.com	601-956-2028	Edit Access
Rebecca Cooper	rebecca.cooper@morganwhite.com	601-956-2028	Edit Access
Rebecca Cooper	rebecca.cooper@morganwhite.com	601-956-2028	Edit Access
Christine Crowe	christine.crowe@morganwhite.com	601-956-2028	Edit Access
Jane Doe	janedoe@doeinsurancetest.com	800-555-3322	Edit Access
Brad Gardner	brad.gardner@morganwhite.com	601-956-2028	Edit Access
Sheri Hutton	sheri.hutton@morganwhite.com	601-956-2028	Edit Access
Sheri Hutton	sheri.hutton@morganwhite.com	601-956-2028	Edit Access

1. Add Contact Button 2. Edit Access Button 3. Page Navigation 4. Entries Navigation

Within the “Broker Contacts” tab, brokers are able to add a contact to their account and assign them a role.

The roles are:

- **Broker Administrator** (ability to view, change, or update information)
- **Group Administrator** (ability to request access to any of the broker’s groups portals as well as generate marketing materials on the broker’s behalf)
- **Marketing Only** (allows only access to the broker’s marketing materials such as email templates or sales button images)
- **Commissions Only** (allows access to commission statements only)

You are able to add a contact to the account by clicking on the “Add Contact” button.

After providing the requested information, the contact’s data will be saved to the account. Next, assign the contact a role inside the portal by clicking the blue “Edit” tab on the right hand side of the page.

****Please Note:** This is a two-step process. Just providing the contact’s information will not give them access to information. You must assign the contact a role and send them an invitation. In turn, they would receive an email notifying them that they are now a contact with access and will be prompted to create their own username and password.

Commissions Tab

Broker Contacts

Commissions

View Statements

Production

Training

Commission Statements

File Format

PDF

Select a Statement Date

PLEASE NOTE Some agent commission statements may contain multiple pages. The amount deposited through direct deposit will show up on the last page of the commission statement as the Grand Total. Please ensure that you are on the last page of your statement to view the totaled deposited amount.

https://brokers.mwadmin.com/File/ViewCommission/1-1-2017 - Internet Explorer
https://brokers.mwadmin.com/File/ViewCommission/1-1-2017

Agent Commissions Statement John Doe (22566) January 2017 (01/01/2017 - 01/31/2017)			1/1
AMFIRST (100) PSMEDICAL Test Group (9999) Invoice # 0 1/31/2017			
	Net Premium	Comm Due	
PREMIUM SAVER Totals:	0.00	0.00	
Invoice Totals:	0.00	0.00	
PSMEDICAL Totals:	0.00	0.00	
AMFIRST (100) Totals:	0.00	0.00	


1. Commission Date Dropdown Menu

The second category on the Broker Portal is the “Commissions” tab. After contracting with MWG and having a full month of commission generated, you can go to this tab at any time and view your history of commission statements. **Please Note:** MWG does not mail commissions statements.

- Once a month ends, on the first day of the next month, the commission cycle is closed.
- Payments are reconciled, which is a manual process and can take 3-5 days to complete. Funds are then deposited by direct deposit
- Commissions are typically paid by the 10th of each month
- “Grand Total” is located on the LAST page of a statement
- The number of pages on a statement is found at the top of the toolbar.
- You can print off the PDF to see all pages or you can “arrow over” to the last page
- You can export these statements in different formats. PDF is the default standard, but you can save it as an image, export in Excel, etc. The File Format Dropdown menu is where you go to change the format once the PDF is opened.

Production Tab

Real Time Enrollment Watcher- Enrollments through your sales platform can be seen in “real time” for brokers who process individual policies, group policies, or both. If you sell a policy on your platform, the successful payment enrollments process directly into one of the two titled production tabs (Individual or Group). From this tab, you will also be able to view Terminated policies.



Language ▾
Manage Portals
Logoff

Broker Contacts ▾
Commissions ▾
Production ▾
Individual
Individual (Terminations)
Group
Training ▾

Showing 1 to 10 of 740 Portals Showing

Show / Hide Columns ▾

Search:

Type	Show All Products ▾	Active ▾	Effective	Amount	Portal	Agent
	THE SILVER PLAN	Active	10/1/2019	\$1,137.31		
	MEDICAL RIDER	Active	10/1/2019	\$27.50		
	THE NEW AMERICAN PLAN	Active	4/1/2015	\$147.68		
	MEDICAL RIDER	Active	4/1/2015	\$20.83		
	MEDICAL RIDER	Active	4/1/2016	\$0.00		
	MEDICAL RIDER	Active	4/1/2016	\$20.83		
	WORLDWIDE MEDICAL TRUST PLAN	Active	4/1/2016	\$1,034.43		
	WORLDWIDE MEDICAL TRUST PLAN	Active	4/1/2016	\$799.27		
	MEDICAL RIDER	Active	9/1/2014	\$20.83		
	THE PREFERRED MEDICAL PLAN	Active	9/1/2014	\$28.37		

Show 10 ▾ Entries

Previous
1
2
3
4
5
...
74
Next

Forms Library

The “Forms Library” is a tool that allows the broker to select the carrier of choice and access any documents on a product.

The screenshot shows the 'Broker Portal by MWG' interface. On the left is a sidebar with navigation links: 'Broker Contacts', 'Commissions', 'Production', 'Training', and 'Forms Library' (which is highlighted). The main content area is titled 'Forms & Documents'. It contains a series of selection steps: 'Select the Enrollment Type' with buttons for 'Individual' (selected) and 'Group'; 'Select a Plan Type' with buttons for 'Medical' (selected), 'Disability', 'Life', 'Savings and Annuity Plans', 'Dental and Vision', 'Critical Disease Cash Plan', 'Individual and Group Dental and Vision', and 'Supplemental'; 'Select a Sub-Territory' with a dropdown menu showing 'All others'; 'Select a Carrier' with buttons for 'AmFirst Life' and 'AmFirst Insurance Company'; and 'Select a Plan' with a dropdown menu showing 'New World Plan'. At the bottom, there is a section labeled 'Forms Library' which is currently blank.

Contact information is displayed at the bottom of all tabs for your convenience on the Broker Portal. This serves as a quick reference if you need to contact one of our departments.