

AGENT COMMISSION PORTAL USER GUIDE

BY GARITYADVANTAGE AGENCIES

Welcome to the GarityAdvantage Commission Management System!

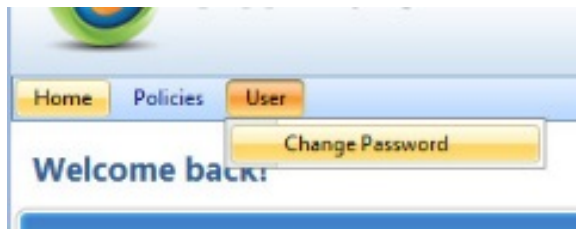
This portal will allow you to:

- View and Print your commission statements in PDF and Excel
- View prior payments on a specific policy
- Check the status of your new policies (Allow 72 hours from submission time for case to appear on portal)
- Agencies and GA's will also be able to view policies written by their downline agents

When your account is created, you will receive a username and password via email.

Access the portal here: <http://gar.gw.spizone.net/Default.aspx>

If you would like to change your password, log in and click on "User" at the top left of the home screen, as shown below:



LET'S GET STARTED!

HOME SCREEN

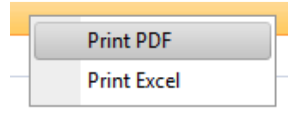
The Home Screen offers an instant snapshot of your pending policies and recent statements.

TIPS! 1) Click on any column header to sort by that column

2) Use the search field on the right to search pending policies by client name.

Agencies and GA's with downlines can also search by the writing agent name.

3) Click once on any statement to choose to view in PDF or Excel



4) Click on "Policies" from the top of the page to view your book of business.

The screenshot shows the GreenWave Commission Management System Home Screen. The top navigation bar includes 'Home', 'Policies', and 'User'. The 'Policies' link is highlighted with a red box and a red arrow pointing to it. The main content area is divided into two sections: 'Pending Policies' and 'Statements'. The 'Pending Policies' section contains a table with columns: Policy Holder, Policy #, Carrier, Lines of Coverage, Policy State, Original Effective Date, Term Status, Primary Broker, Termination Reason, and Termination Effective. The 'Statements' section contains a table with columns: Producer, Advances, Commission, Amount, Reference #, and Posted On. On the right side, there is a 'Book of Business' widget with a pie chart showing 'Renewals (48)' and 'Terminations (5)', and a 'New (119)' indicator. The bottom right corner shows 'Welcome, Agent | Logout'.

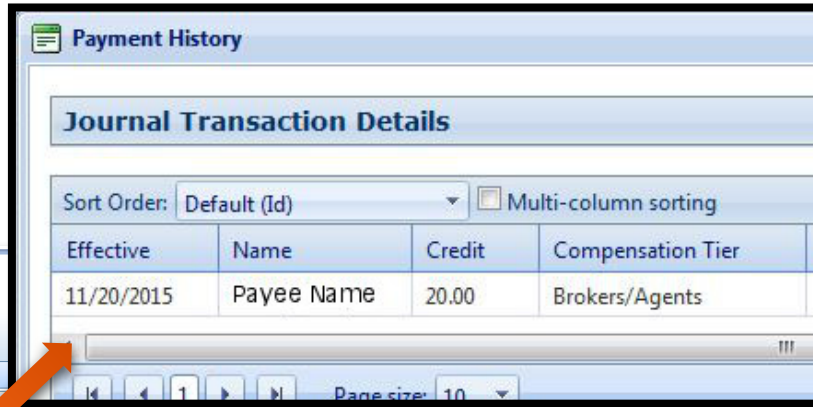
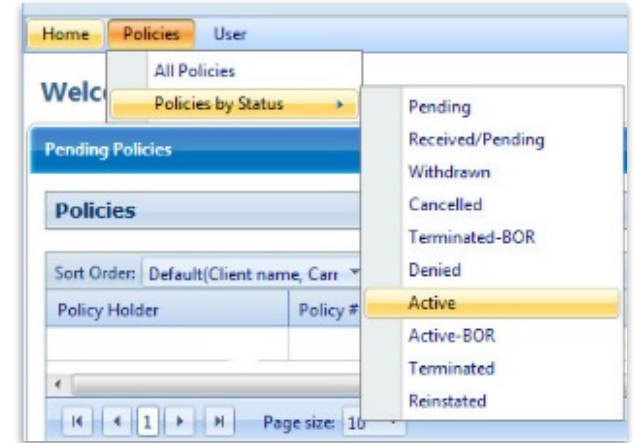
Policy Holder	Policy #	Carrier	Lines of Coverage	Policy State	Original Effective Date	Term Status	Primary Broker	Termination Reason	Termination Effective
Client Name		Harvard Pilgrim	Core Plan	MA	11/12/2015	Pending	Writing Agent Name	Not Terminated	
Client Name		Harvard Pilgrim	Plan 1	MA	11/2/2015	Received/Pending	Writing Agent Name	Not Terminated	

Producer	Advances	Commission	Amount	Reference #	Posted On
Statement Payee Name	0.00	336.33	336.33	1474	11/20/2015
Statement Payee Name	100.00	0.00	100.00	1419	11/6/2015
Statement Payee Name	160.00	0.00	160.00	1289	10/23/2015
Statement Payee Name	440.00	0.00	440.00	478	10/6/2015

POLICIES

TIPS!

- 1) You have the option of viewing all policies or you may filter by status.
- 2) From the Policy screen, you have the same sorting and searching functions previously described on the Home Screen. However, you can *also search on policy number from this view.*
- 3) Term # indicates the year of the policy. (0 = First Year)
- 4) Double-Click on a policy to view the payment history of that individual policy



GreenWave

Home Policies User

Policies - Double-Click to View Payments

Sort Order: Default(Client name, Carr) Multi-column sorting

Policy	Carrier	Lines of Coverage	Term #	Primary Broker	Term Effective Date	Term Expiration Date	Term Status	Overview	Termination Reason	Termination Effective
Smith, John (HPK45 00000)	Harvard Pilgrim	Plan 1	0	Writing Agent Name	1/1/2016	1/1/2017	Active	Future	Not Terminated	
Example, Jane (HPK41 00000)	Harvard Pilgrim	Plan 1	0	Writing Agent Name	1/1/2015	1/1/2016	Active	Effective	Not Terminated	
Carr, Tim (HPK1234500/)	Harvard Pilgrim	Plan 1	0	Writing Agent Name	1/1/2015	1/1/2016	Active	Effective	Not Terminated	
Johnson, Eugene (HPK4567800/)	Harvard Pilgrim	Core Plan	0	Writing Agent Name	6/1/2015	6/1/2016	Active	Effective	Not Terminated	
Test, Ann (HPK9638500/)	Harvard Pilgrim	Plan 1	1	Writing Agent Name	10/1/2015	10/1/2016	Active-BOR	Effective	Not Terminated	
Simpson, Allan (HPK7412500/)	Harvard Pilgrim	Core Plan	1	Writing Agent Name	5/1/2015	5/1/2016	Active	Effective	Not Terminated	
Jones, Tina (HPK4125500/)	Harvard Pilgrim	Core Plan	1	Writing Agent Name	4/1/2015	4/1/2016	Active	Effective	Not Terminated	
Test, Brian (HPK2233900/)	Harvard Pilgrim	Plan 1	0	Writing Agent Name	7/1/2015	7/1/2016	Active	Effective	Not Terminated	
Kelley, Mary Louise (HPK8847100/)	Harvard Pilgrim	Core Plan	0	Writing Agent Name	12/1/2014	12/1/2015	Active	Expired	Not Terminated	
Rogers, Frank (HPK1044500/)	Harvard Pilgrim	Plan 1	0	Writing Agent Name	12/1/2015	12/1/2016	Active	Effective	Not Terminated	

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179 items in 18 pages

If you need assistance navigating your portal, contact GarityAdvantage at commissions@garityadvantage.com or 800-234-9488