



## THE BROKER PORTAL FAQ's

**Q: What is the broker portal URL?**

A: [Brokers.mwadmin.com](http://Brokers.mwadmin.com)

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A: Morgan White Group (MWG) is now paper free, therefore we have created a secure portal for each of our contracted agents. The main functions of the Broker Portal allow agents to set up direct deposit of commissions, retrieve monthly commission statements, view upline/downline (if applicable) or edit their broker profile. When registering within the portal, for security, the agent's credentials must match what is in our system.

**Q: What do I do if I can't remember my user name and/or password?**

A: Go to [brokers.mwadmin.com](http://brokers.mwadmin.com) and click "Forgot Password". It will ask for either your username or email address. Enter the email address you used when you registered with the portal. An email will be sent to that email address which will allow you to reset the password. Once you reset your password, you will be logged in. Your username will be displayed in the top right hand corner of the screen. Please make note of your username and password in a secure location.

When logging in, if you enter your email address and nothing is displayed, or you receive an error message, it is because the email you entered does not match what we have in our system.

Tips to recovering correct email address to log into portal: Maybe you registered with another work email address, or an email address from a Yahoo, Gmail, or AOL account? Perhaps someone such as your wife, secretary, accounting or IT employee registered you for the portal on your behalf. Try their email address to log in.

**Q: Do I have to have my commissions deposited EFT?**

A: In 2012, MWG made the decision to go paper free, therefore we no longer mail paper checks or statements.

To set up or edit your bank account information for direct deposit, click the "Profile" button. In the lower left hand corner, click on the bank account name to edit it. You must choose the "EFT" button then "Save" in order to be paid commissions by direct deposit.

Commission statements can be printed by choosing the "Commissions" tab on the far left column. Select the month you want to view and click the button to generate a PDF. You can choose other file formats available for exporting by viewing the drop down options. The complete total of the direct deposit will be on the very last page under "Grand Total". Simply "arrow over" to the last page or print off the statement.

**Q: I don't want to fill out my EFT online. Can I fill out a paper application and submit it with a voided check instead?**

A: While we encourage you to utilize the secure portal, yes we send you a paper application. Contact [Mary.Newman@morganwhite.com](mailto:Mary.Newman@morganwhite.com) or [Ginene.Walker@Morganwhite.com](mailto:Ginene.Walker@Morganwhite.com)

**Q: When I go to the "EFT" tab to change my banking information, the "Payable To" field is grayed out and I am unable to make any edits. Why?**

A: The "Payable To" field is grayed out because additional paperwork is needed from you. Call 1-800-800-1397 and ask for our Commissions Department or email [Mary.Newman@morganwhite.com](mailto:Mary.Newman@morganwhite.com) and she or someone from her team can assist. Once you submit the necessary paperwork, the change will be made in our system and will be reflected in the portal within minutes.

**Q: What name shows up on the bank statement when MWG commissions are deposited into my account?**

A: This depends on the agent's bank. There are a few descriptive fields that we send on the bank file and each bank can use them differently. Some examples of what you may see are:

**MWGCOMMISSIONPMTMWG, COMMISSION PMT, MWGCOMMPMT.** The company name that is sent on the EFT file from our system is **MWGCOMMISSIONPMT**.

**Q: I received an email stating my latest statement is in my portal. But when I open it, it is last month's date. Why is that?**

A: Once a month ends and on the first day of the next month, the commission cycle is closed, payments are reconciled and funds are deposited by direct deposit into accounts set up through the portal. Because this is a manual process, it can take anywhere from 3-5 days to complete. Commissions are typically paid by the 10th of each month. In essence, you are paid for the previous month during the first week of the following month. **(EXAMPLES: June's commissions are closed out at the end of June and paid in July. July's commissions are closed out at the end of July and paid in August, and so on.)**

**Q: My statement amount doesn't match the EFT deposit in my account.**

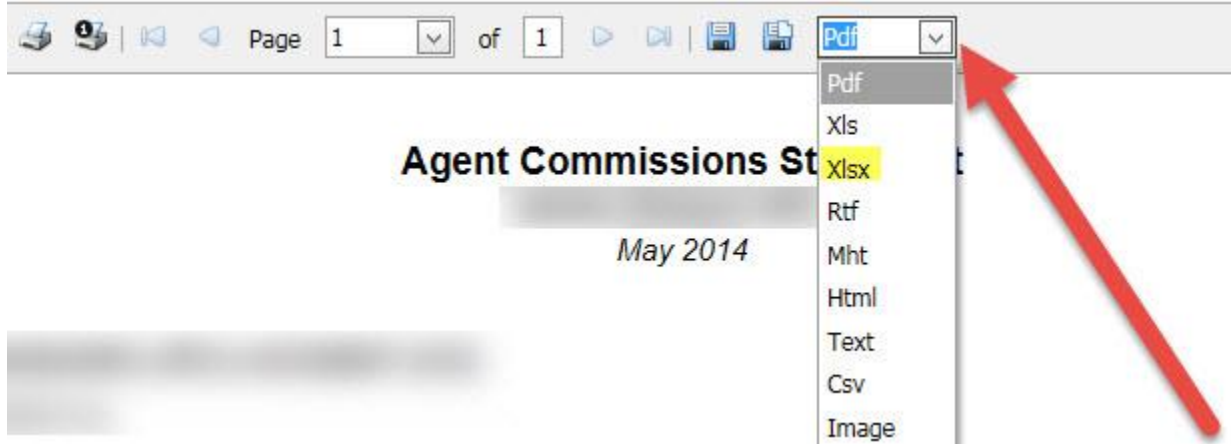
A: First, make sure you are viewing the full commission statement. On each statement, the Grand Total will always be on the last page and will match the amount of the deposit. Some agents will only have one page and some will have 40. You can either physically print off your statement, look at the last page and see the Grand Total or you can "arrow over" to the last page once the PDF is opened. If the Grand Total still does not match the total deposited, call our Commissions Department at 1-800-800-1397 for assistance.



**Agent Commissions Statement**

**Q: My commission statement is in a PDF format. Can I view it in Excel or CSV format instead?**

A: Yes. The statements default to PDF as the file format. However, once the pdf is opened, you will have an option by way of drop down box, to choose any format we have made available to you.



**Q: My Company pays commission to a broker, however we need access to the broker's statement in order to close out our books for the month. Can our company obtain access to this particular broker's portal to retrieve the necessary documentation?**

A: The portal is designed specifically for brokers and MWG cannot grant access to a broker's private portal. However, your company can request a copy of the commission statement from the broker on a monthly basis. Your company can also ask the broker to share his or her username/password used to create their personal portal in order for the company to have access to the statements.

**Q: Can I grant a contact access to my portal?**

A: Yes. Under the "Contact" tab, you will be able to add someone and assign them a role within your portal.

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" (only allows access to the broker's marketing materials such as email templates or sales button images), and "Commissions Only" (allows access to commission statements only).

**It is a two-step process.** First, go to the "Contacts" tab, click "Add a Contact" and fill out their data. Although they are now listed as a contact, they do not have access to the portal.

The second step is to click "edit" by their name, assign them a role, and generate an invitation which will be emailed to them. Upon receipt of this email, the contact will create their own username and password to gain entry to your portal under the role assigned by you.

**Note:** You can revoke access for a contact at any time and edit a contact at any time. You can also have as many contacts as you wish to create.

**Q: For the marketing pieces which contain code, can your IT department help me load the materials onto my website?**

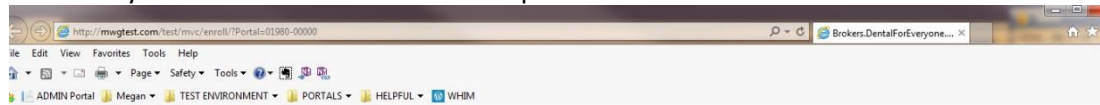
A: At this time, **MWG does not provide IT support or programmers to any broker for setting up marketing pieces on a broker's website.** If you have a question about the code, you can email [portalhelp@morganwhite.com](mailto:portalhelp@morganwhite.com) and a representative will attempt to answer your question. Please note, due to the various versions of websites available, we cannot promise we can resolve the issue.

**Q: Is my commission tracked to me through my unique broker code which is tied to the marketing materials on my website?**

A: Yes. Each broker's portal is unique. The marketing materials within the portal, such as the "Marketing" tab, DFE images, the quote box, and email templates are directly tied to the broker's sales code.

**Q: Can I customize my product enrollment platforms?**

A: Yes! Log into your portal at [brokers.mwadmin.com](http://brokers.mwadmin.com) and click the "Portal" button in the left column options. Click the "Customize" icon. Place a check box next to the field you want to display on your website and click "Save" at the bottom. The options for company name, logo, phone number, email and agent name are available for you to enter. Please note: This is a template, so we are unable to "rearrange" where the four fields are displayed on the layout. You do have the option to include only the fields you want. You can even click the preview button to see what it looks like.



**MWG Benefits, Inc.**

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**Dental and Vision Insurance**

**Q: The groups I represent have a portal with MWG. Can I access their group portal through my broker portal? If I have more than one group, will I need multiple logins?**

A: Yes, you can access a group portal through your broker portal, and you will only need one login to complete the process. Access your broker portal by entering the username and password you created upon registration. From there you can click the word "Groups" on the left hand column. Any groups associated with your production will appear as an option. Next to the name of the group, you will see

“Request Access”. Click it once and the group will receive an email asking for permission to allow you into their group portal for edits.

You should now see the word “Pending” next to the group's name until the group accepts or declines your request. Once an action is taken by the group, you will either see the words “Decline” or “Go to Portal”. (You will receive an email notifying you of the group’s decision to accept or decline your request).

If you are granted access to the group’s portal, you will be able to “Toggle” into their portal by clicking the icon next to their company name. Once you are transferred into their portal, click the “Home” icon next to their company name to view the various page options. Remember, a User Guide and FAQ's can be found at the bottom of the group portal to help you navigate the site.

**Q: Can I see my group or individual enrollments that come through my platform in real time?**

A: Yes. There is a production tab under the left hand column of the broker portal. If you sell Individual or Group policies (or both) and they process through with successful payment, the enrollment will go directly into one of these two titled production tabs (Individual or Group). Click there first to see more details per successful enrollment. An enrollment can take anywhere from 1 minute to a day to process depending on if there is any information missing to completely pass the policy through. There is a “**Pending Enrollment**” tab which will display up to 30 days past of enrollments that may have been aborted, had failed payment or is still in the process of being submitted.

Status Wording: There are 4 different status notifications next to each enrollment in the pending enrollments tab which explain where the enrollment is. Remember these can change status within minutes so no action should be taken on these. It is simply for reference on an enrollment. The status “**Ready**” means it was successful and it will process into the (Individuals/Group) production folder within a few minutes/hour. The status “**incomplete**” means the person has not clicked submit. **Note:** That does not mean they are done though. They could have minimized their screen and may come back later to finish. The status “**Payment Error**” means they were given a response in enrollment that something was wrong with the method of payment they entered. Could be a typo on the digits of a CC, insufficient funds, or a bad routing number keyed in. Either way, it failed and did not process and they were notified of it at the time. Finally, the status “**Payment Added**” means the participant added payment on that section of enrollment, but never clicked submit. So the enrollment didn’t process and they did not get a confirmation of a sold policy.

**Q: Who do I contact if I need assistance?**

A: If you have a commissions specific question contact the Commissions Department at 1-800-800-1397 or email [Mary.Newman@morganwhite.com](mailto:Mary.Newman@morganwhite.com) or [Ginene.Walker@morganwhite.com](mailto:Ginene.Walker@morganwhite.com)

If you have a question about your broker links or anything dealing with contracting or sales, contact your Broker Services Representative directly, call MWG Broker Services at 1-877-759-5728, or email [brokerservices@morganwhite.com](mailto:brokerservices@morganwhite.com). If you are having technical issues with your portal or receive an error message, please contact [portalhelp@morganwhite.com](mailto:portalhelp@morganwhite.com). Screen shots of the error are appreciated if possible.

**\*\* If you have an idea to enhance your portal use, please click “FEEDBACK” at the bottom of the website and submit your suggestion for consideration. You may also email [portalhelp@morganwhite.com](mailto:portalhelp@morganwhite.com) to have a MWG representative review each submission.**