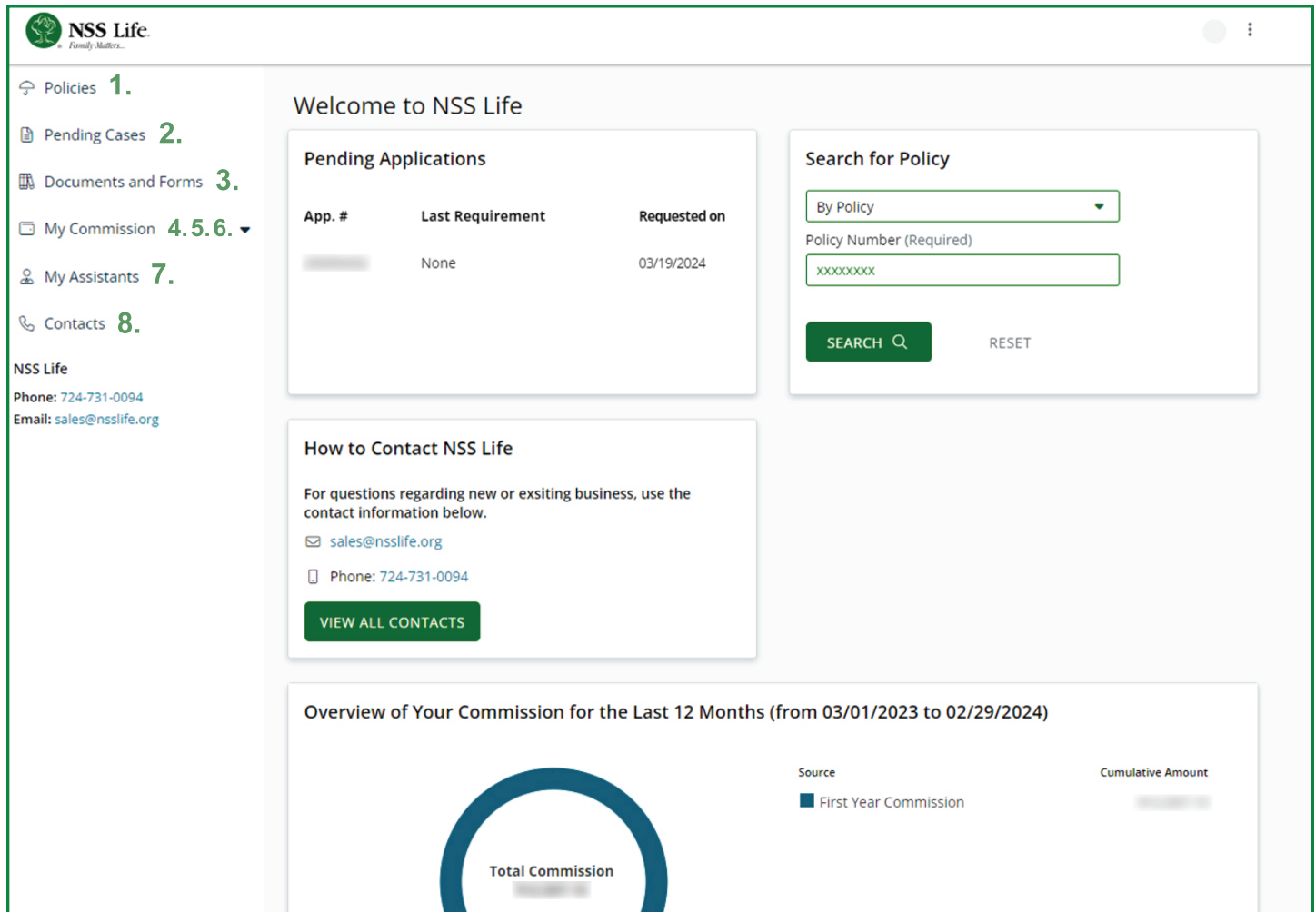


# AGENT ANNUITY PORTAL USER NAVIGATION GUIDE

## Home Page

Upon a successful login, the user will load the portal home page referenced below. The Menu on the left of your screen will direct you to the following pages:

1. **Policies** – Search for policies based on selected criteria (Policy Number, Application Number, General Criteria.)
2. **Pending Cases** – Search for pending cases based on selected criteria (Party Type, Date, Pending Issues.)
3. **Documents and Forms** – Search for downloadable Sales related documents or forms.
4. **My Commission** – General synopsis for user’s account based on the last 12 months of activity.
5. **Commission Reports**– Display commission reports based on selected timeframe.
6. **Account Statements** – Display downloadable account statements for specified timeframe.
7. **My Assistants** – Add assistant accounts to office staff enabling them to access your accounts (privileges, etc.)
8. **Contacts** – Contact directory for NSS home office staff if support is needed.



The screenshot shows the NSS Life portal home page. On the left is a navigation menu with items: Policies 1., Pending Cases 2., Documents and Forms 3., My Commission 4.5.6., My Assistants 7., and Contacts 8. Below the menu is contact information for NSS Life: Phone: 724-731-0094, Email: sales@nsslife.org.

The main content area is titled "Welcome to NSS Life" and contains three primary sections:

- Pending Applications:** A table with columns "App. #", "Last Requirement", and "Requested on". One entry is visible with "None" for the last requirement and "03/19/2024" for the requested date.
- Search for Policy:** A search interface with a dropdown menu set to "By Policy", a text input field for "Policy Number (Required)" containing "xxxxxxx", and "SEARCH" and "RESET" buttons.
- How to Contact NSS Life:** A section providing contact information: "For questions regarding new or existing business, use the contact information below." It lists the email "sales@nsslife.org" and phone "724-731-0094", with a "VIEW ALL CONTACTS" button.

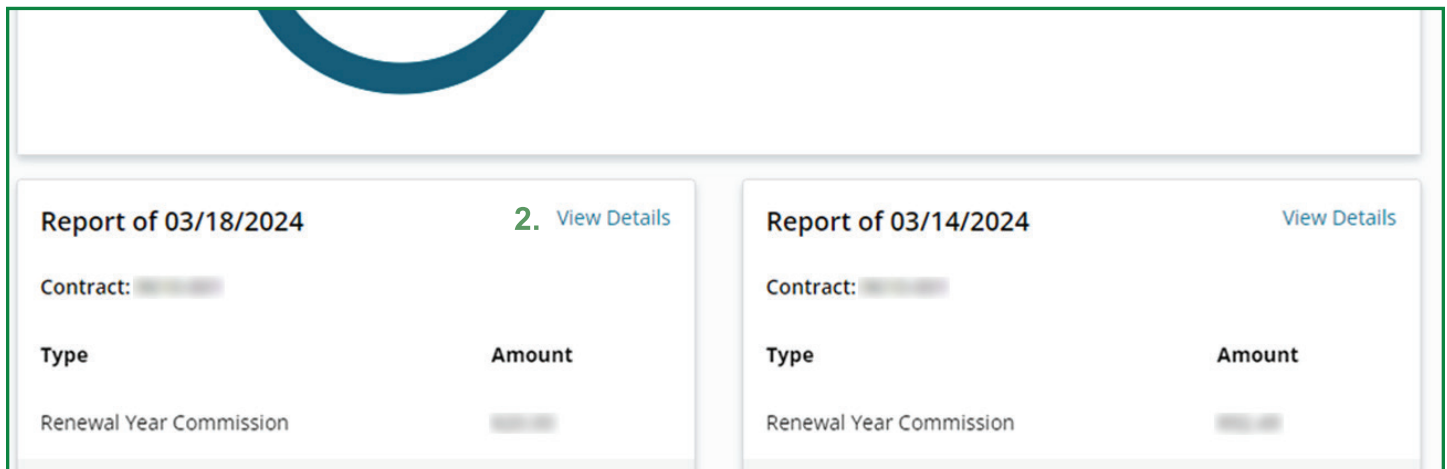
At the bottom, there is a section titled "Overview of Your Commission for the Last 12 Months (from 03/01/2023 to 02/29/2024)". It features a large circular gauge for "Total Commission" and a legend for "Source" with "First Year Commission" indicated by a blue square. A "Cumulative Amount" is also shown.

# AGENT ANNUITY PORTAL USER NAVIGATION GUIDE

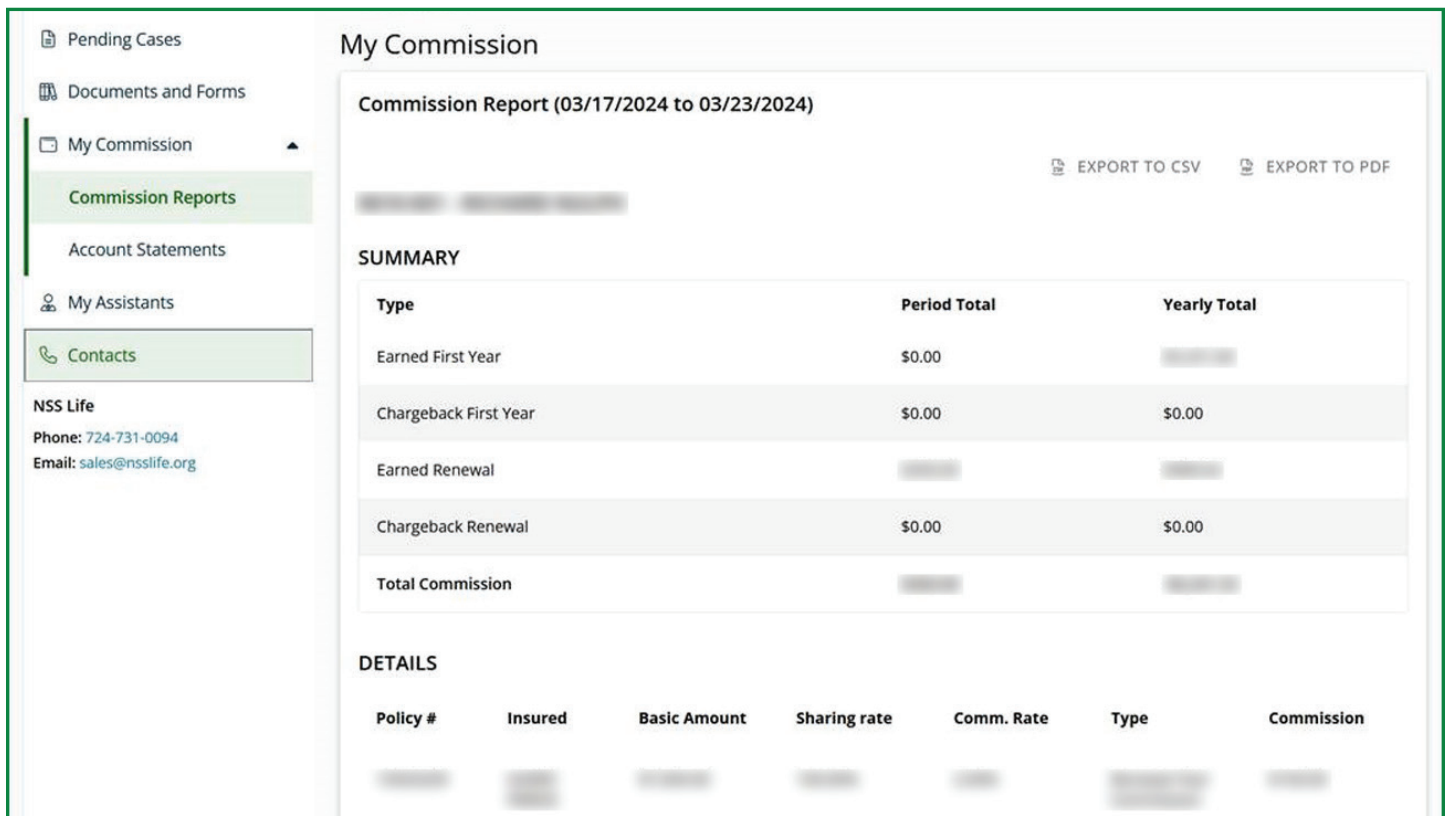
## How to access Commission Summary Reports

To access your **Commission Summary Reports** page, follow the instructions below:

1. On the home page, scroll down to the **Commission Report** section, underneath the **Commission Overview** section.
2. At the top right of either report box (the most recent report starting from the left), click on the **View Details** link. This will take you to the **Commissions Summary Report** page for the date range selected.



The screenshot shows two report boxes side-by-side. The left box is titled "Report of 03/18/2024" and has a "2. View Details" link. The right box is titled "Report of 03/14/2024" and has a "View Details" link. Both boxes show a "Contract:" field, a "Type" field with "Renewal Year Commission" selected, and an "Amount" field.



The screenshot shows the "My Commission" page. On the left is a navigation menu with items: Pending Cases, Documents and Forms, My Commission (selected), Commission Reports (highlighted), Account Statements, My Assistants, and Contacts. Below the menu is contact information for NSS Life: Phone: 724-731-0094, Email: sales@nsslife.org.

The main content area is titled "My Commission" and shows a "Commission Report (03/17/2024 to 03/23/2024)". There are "EXPORT TO CSV" and "EXPORT TO PDF" links. Below this is a "SUMMARY" table:

| Type                    | Period Total | Yearly Total |
|-------------------------|--------------|--------------|
| Earned First Year       | \$0.00       |              |
| Chargeback First Year   | \$0.00       | \$0.00       |
| Earned Renewal          |              |              |
| Chargeback Renewal      | \$0.00       | \$0.00       |
| <b>Total Commission</b> |              |              |

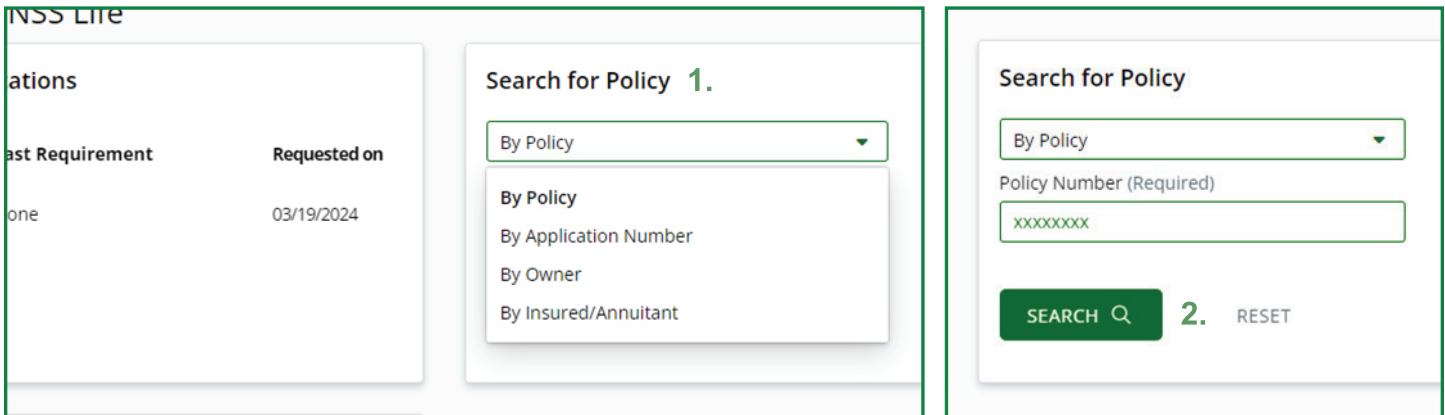
Below the summary table is a "DETAILS" table with the following columns: Policy #, Insured, Basic Amount, Sharing rate, Comm. Rate, Type, and Commission.

# AGENT ANNUITY PORTAL USER NAVIGATION GUIDE

## How to access Payment and Disbursement History

To access your **Payment and Disbursement History** page, follow the instructions below:

1. On the home page, in the far right **Search for Policy** section, select the method you wish to search for a policy.
2. Enter the desired search parameters, then click the **Search** button.



3. Select the desired policy out of the list your search generated.
4. In the **Options** drop down menu to the right of the policy number, select the **View Payment and Disbursement History**.

