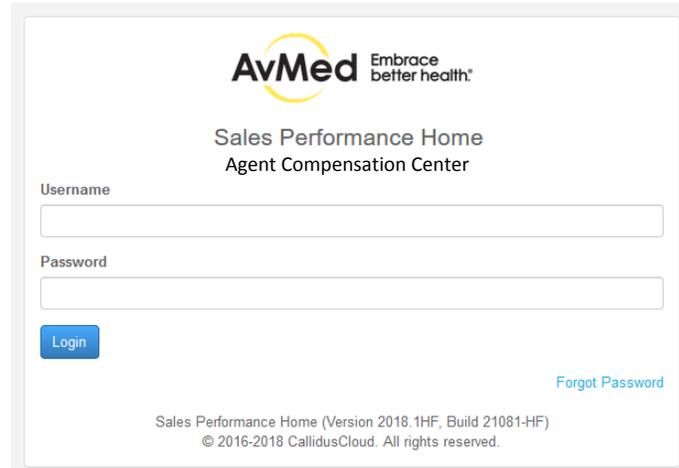


## Logging into the Agent Compensation Center:

URL: <https://avmd-mprd.callidusondemand.com/SalesPortal/#!/>



The screenshot shows the login page for the AvMed Sales Performance Home Agent Compensation Center. At the top, the AvMed logo is displayed with the tagline "Embrace better health." Below the logo, the text "Sales Performance Home" and "Agent Compensation Center" is centered. There are two input fields: "Username" and "Password". A blue "Login" button is positioned below the password field. To the right of the password field, there is a link that says "Forgot Password". At the bottom of the page, there is a small copyright notice: "Sales Performance Home (Version 2018.1HF, Build 21081-HF) © 2016-2018 CallidusCloud. All rights reserved."

**Username: "VN"+ (i.e. VNxxxxx)**

**First Time Login & Password Prompt:** You will receive a link via email with your Username (pre-filled, please take note of it), which will prompt you to create a password the first time you login to the system. If for some reason you do not receive the initial login email, follow the Password Reset instructions listed below.

**Password Reset:** Enter your Username (you will need to know your VN# in order to reset), select "Forgot Password", and on the following page select "Submit" to have an email sent to you. Please note the link in the email is only good for 60 minutes.

**Agency Administrator aka Primary Commission Contact:** Password reset emails are sent to the agency's designated Agency Administrator also referred to as Primary Commission Contact's email. Please email your agent support representative if there are changes to the primary contact and email.

**Agent Compensation Center Access:** There are several ways to access the Agent Compensation Center.

1. The link in the monthly Payment Advice email sent to the Agency Administrator.
2. Via [www.avmed.org](http://www.avmed.org), click on Business, under Agents click on AgentCompensation, and then click on the blue Compensation Statements button.
3. Save the web URL <https://avmd-mprd.callidusondemand.com/SalesPortal/#!/> into your favorites; or, as a short cut on your desktop.

## Global Dashboard:

Below is what your screen will look like when you first log into CallidusCloud:

The screenshot shows the top navigation area with a 'Viewing:' dropdown menu set to 'Global Dashboard' and a 'Period:' dropdown menu set to 'Jan 1, 2018 - Jan 31, 2018'. Below this are two main sections: 'AvMed Announcements' and 'Payee Profile'. The 'AvMed Announcements' section contains a message: 'This is your Global Dashboard. To navigate to your Compensation Dashboard, please select your dashboard from the drop-down menu at the top of your screen, labeled "Viewing."' The 'Payee Profile' section lists fields for 'First:', 'Last:', 'User Name:', 'Position Name:', and 'E-mail:'.

### ***AvMed Announcements:***

This displays announcements from the Compensation Team at AvMed to all users of CallidusCloud.

### ***Payee Profile:***

Displays your agency's information as follows:

First: (not applicable)

Last: Agency Name

User Name: Callidus Login Username

Position Name: Same as your Username with the addition of \_IFP to indicate Individual Sales only

Email: Agency Administrator/Primary Commission Contact's email address

**To drill down to your reporting dashboards, select "IFP External – Producer" from the drop-down menu**

This screenshot is similar to the first one but shows the 'Viewing:' dropdown menu expanded. It lists 'Global Dashboard' and 'IFP External - Producer', with 'IFP External - Producer' highlighted in blue. The 'Period:' dropdown menu remains set to 'Jan 1, 2018 - Jan 31, 2018'. The 'AvMed Announcements' and 'Payee Profile' sections are visible below.

## Performance Dashboards:

This is the dashboard you will be able to see after navigating from the Global Dashboard:

### Announcements

This is your INDIVIDUAL & FAMILY Dashboard.

Each month, you will see your agency's most recent commission and bonus information on this page. We are pleased to present to you six different views of your AvMed compensation and customer information which we hope meet all your needs. To export a statement of all detail for the current month's payment, go to the bottom of this page and see the Transaction Detail dashboard. Just click on the DOWNLOAD button in blue.

Below is a brief overview of each dashboard and what data it provides. Starting to the right of this page and moving clockwise, you will see:

- MEMBER COUNT BREAKDOWN** – Your current membership, broken down by new, renewal, commissionable and non-commissionable. Click on the graph for more detail.
- MONTHLY COMMISSION BREAKDOWN** – Your payment amount by month.
- CURRENT MONTH COMMISSION** – Your YTD payment amounts. Click on the blue number for more detail.
- YTD COMMISSION**
- TRANSACTION DETAIL** – All detail about who and what you were paid per subscriber. **NOTE: This is where you may export your detail into a statement document. Just click on the EXPORT button in blue.**
- MEMBER AND SUBSCRIBER COUNT** – Your current new and renewal and adjustment member and subscriber counts.

Please contact us with any questions at [AvMedAgentSupport@avmed.org](mailto:AvMedAgentSupport@avmed.org) or 800-461-2950.

### Member Count Breakdown

Click on graph to see member count detail

Legend: IFP External Producer Renewal, IFP External Producer New Business, IFP Prod Non-Commissionable New Business, IFP Prod Non-Commissionable Renewal

### Subscriber and Member Count

Filter

Name	Total Subscriber Count	Total Member Count
New Subscriber/Member Count - Commissionable	7.00	16.00
New Subscriber/Member Count - Non-Commissionable	1.00	1.00
Renewed Subscriber/Member Count - Commissionable	22.00	46.00
Renewed Subscriber/Member Count - Non-Commissionable	1.00	1.00
	<b>31.00</b>	<b>64.00</b>

### Monthly Commission Breakdown

January 2018

New Business Commission	\$256.00
Renewal Commission	\$598.00
Adjustments	\$108.00

### Current Month Commission

Click the blue number below to see a breakdown

\$962.00

### YTD Commission

\$962.00

### Transaction Detail

Filter

Comp Date	Service Month	Original Eff Date	Subscriber Name	Subscriber #_Eff Date	Business Type	Member Count	Commission Rate	Commission Amount	County	Agent Name	Plan Name	Comments
1/1/18	1/31/18	7/1/16			Renewal	2.00	\$13.00	\$26.00	BW		Engage LB650-IN18	--
1/1/18	1/31/18	1/1/17			Renewal	1.00	\$13.00	\$13.00	DD		Engage LS500-IN18	--
1/1/18	1/31/18	1/1/17			Renewal	1.00	\$13.00	\$13.00	BW		Empower MS400-IN18	--
1/1/18	1/31/18	1/1/17			Renewal	4.00	\$13.00	\$52.00	BW		Empower MS500-IN18	--
1/1/18	1/31/18	1/1/17			Renewal	1.00	\$13.00	\$13.00	BW		Engage LB600-IN18	--
1/1/18	1/31/18	1/1/17			Renewal	3.00	\$13.00	\$39.00	BW		Engage LB650-IN18	--
1/1/18	1/31/18	2/1/17			New	6.00	\$16.00	\$96.00	BW		Engage LS500-IN18	--

### County Legend

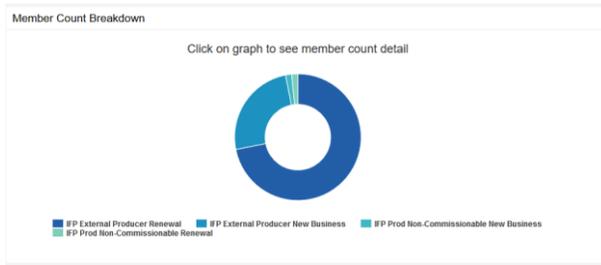
- BW: Broward County
- DD: Miami-Dade County
- PB: Palm Beach County

### Announcements:

This displays announcements from the Compensation and Finance Teams at AvMed to Agencies specifically.

### Member Count Breakdown:

This widget displays your member count, broken into New and Renewed Member Count. This also breaks the member count into *Commissionable* and *Non-Commissionable* based on the criteria laid out in your compensation plan. The titles at the bottom of the widget can be clicked to toggle them out and back into the graph.



When you hover over a certain group, it displays the associated member count:



Finally, if you click into one of the groups, it will take you to a drill-down where you can see the details of your members that make up that group. On that drill-down, you can click the download button in the upper right-hand corner to download to excel.

Transaction Detail

Comp Date	Service Month	Original Eff Date	Subscriber Name	Subscriber #_Eff Date	Business Type	Member Count	Commission Rate	County	Agent Name	Plan Name
1/1/18	1/31/18	2/1/17			New	6.00	\$16.00	BW		Engage LS550-IN18
1/1/18	1/31/18	1/1/18			New	1.00	\$16.00	BW		Empower MG225-IN18
1/1/18	1/31/18	1/1/18			New	1.00	\$16.00	BW		Empower MB600-IN18
1/1/18	1/31/18	11/1/17			New	2.00	\$16.00	DD		Empower MB650-IN18
1/1/18	1/31/18	1/1/18			New	3.00	\$16.00	BW		Engage LB650-IN18
1/1/18	1/31/18	1/1/18			New	1.00	\$16.00	BW		Empower MG225-IN18
1/1/18	1/31/18	9/1/17			New	2.00	\$16.00	DD		Engage LS550-IN18

### Subscriber and Member Count:

This displays a breakdown of New and Renewed, Commissionable and Non-Commissionable Subscriber and Member Counts for the displayed month. The icon in the top right indicates that this table can be downloaded to excel.

Subscriber and Member Count

Name	Total Subscriber Count	Total Member Count
New Subscriber/Member Count - Commissionable	7.00	16.00
New Subscriber/Member Count - Non-Commissionable	1.00	1.00
Renewed Subscriber/Member Count - Commissionable	22.00	46.00
Renewed Subscriber/Member Count - Non-Commissionable	1.00	1.00
	<b>31.00</b>	<b>64.00</b>

### Monthly Commission Breakdown:

This widget shows your monthly commission broken down into New Business, Renewal, and Adjustments. This will show data broken down by month and so you are able to see a month-by-month comparison.

Monthly Commission Breakdown

January 2018	
New Business Commission	\$256.00
Renewal Commission	\$598.00
Adjustments	\$108.00

**Current Month Commission:**

This widget displays what you were be paid this month. You can select the blue number to see a breakdown of how this was calculated.

Current Month Commission

Click the blue number below to see a breakdown

**\$962.00**

**YTD Commission:**

This widget displays what you have been paid so far, this year, including the current month.

YTD Commission

**\$962.00**

**Transaction Detail Report:**

This displays all of your current members including new and renewed members, reinstatements, clawbacks, and adjustments. Each header is sortable, and you can also filter by entering text into the filter bar at the top. Finally, by selecting the icon in the top corner allows you to download all transactions to Excel.

Transaction Detail

Filter  

Comp Date	Service Month	Original Eff Date	Subscriber Name	Subscriber #_Eff Date	Business Type	Member Count	Commission Rate	Commission Amount	County	Agent Name	Plan Name	Comments
1/1/18	1/31/18	7/1/16			Renewal	2.00	\$13.00	\$26.00	BW		Engage LB650-IN18	--
1/1/18	1/31/18	1/1/17			Renewal	1.00	\$13.00	\$13.00	DD		Engage LS500-IN18	--
1/1/18	1/31/18	1/1/17			Renewal	1.00	\$13.00	\$13.00	BW		Empower MS400-IN18	--
1/1/18	1/31/18	1/1/17			Renewal	4.00	\$13.00	\$52.00	BW		Empower MS500-IN18	--
1/1/18	1/31/18	1/1/17			Renewal	1.00	\$13.00	\$13.00	BW		Engage LB600-IN18	--
1/1/18	1/31/18	1/1/17			Renewal	3.00	\$13.00	\$39.00	BW		Engage LB650-IN18	--
1/1/18	1/31/18	2/1/17			New	6.00	\$16.00	\$96.00	BW		Engage LS500-IN18	--

**County Legend:**

This widget describes the 3 main counties with their 2 letter codes.

County Legend

- o BW: Broward County
- o DD: Miami-Dade County
- o PB: Palm Beach County