

M T Donahoe & Associates

**ON-LINE STATEMENT
TUTORIAL**

Please take a few minutes to learn how to
fully utilize our on-line statement feature.

Thank you!

First Step

- ▣ Click on Commission Reporting

[About Us](#) | [Products](#) | [Deadlines](#) | [MTDA Broker Portal](#) | [FAQ](#) | [ACA Resources](#) | [Contact Us](#) |

Broker Portal

- [User Settings](#)
- [Logout](#)

BROKER TOOLS

- [Quote Request](#)
- [Broker FAQs](#)
- [Government](#)
- [Broker Training](#)
- [Forms \(testing\)](#)

Welcome, **CarolB**

[Book of Business](#)

[Commission Reporting](#)

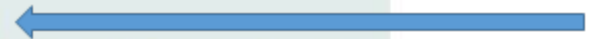
[You have been identified as an MTD employee](#)

[Anthem Medicare Advantage Entry Form](#)

[New Business Status](#)

[Renewals \(Group 2-50 and 51+\)](#)

[Quote System](#)



Getting Started



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Commission Reporting

Producer: ● 311

[Need Help ?](#)

Run Date:

Dec 2015

Report

Use the RESET button to activate this section.

Carrier	LOB	Customer or Policy	Carrier
ALL	ALL	All Customer Names	From
Anthem	Bonus	All Policy Numbers	To
CareFirst Group	Dental		
CareFirst Individual	Medical		
Kaiser	RX		
	Vision		

Filter Report

Use the RESET button to activate this section.

Make PDF

Make Excel

RESET

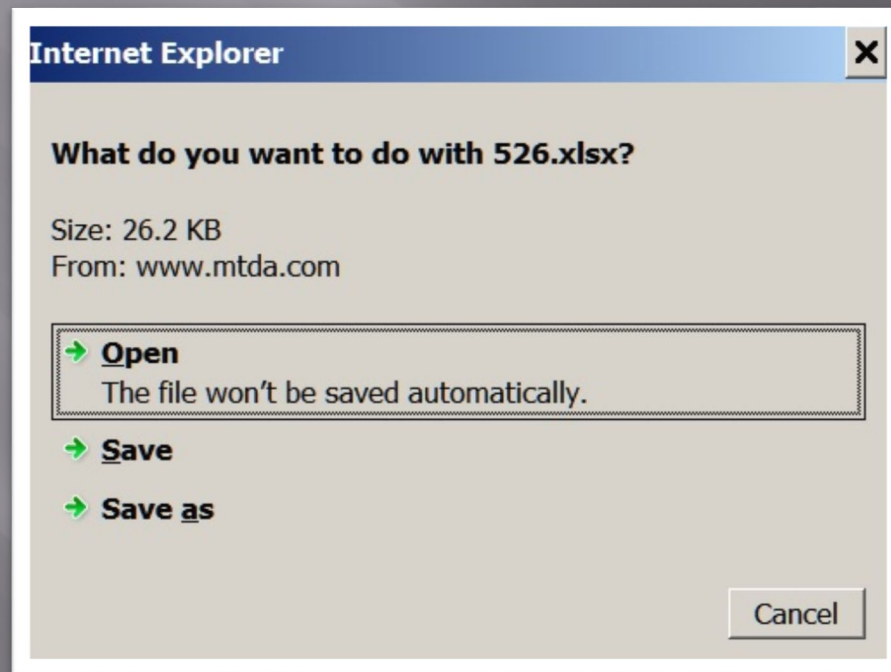
The most recent statement is here.
Click the download format (PDF or Excel), that you prefer, below. You may need to allow pop-ups.

Report for Producer 311 and a Run Date of 12/19/2015

Carrier	Policy #	Customer	Carrier Date LOB	Commission
Anthem	182M*****	BROW*****	09/01/2015 Medical	\$18.00

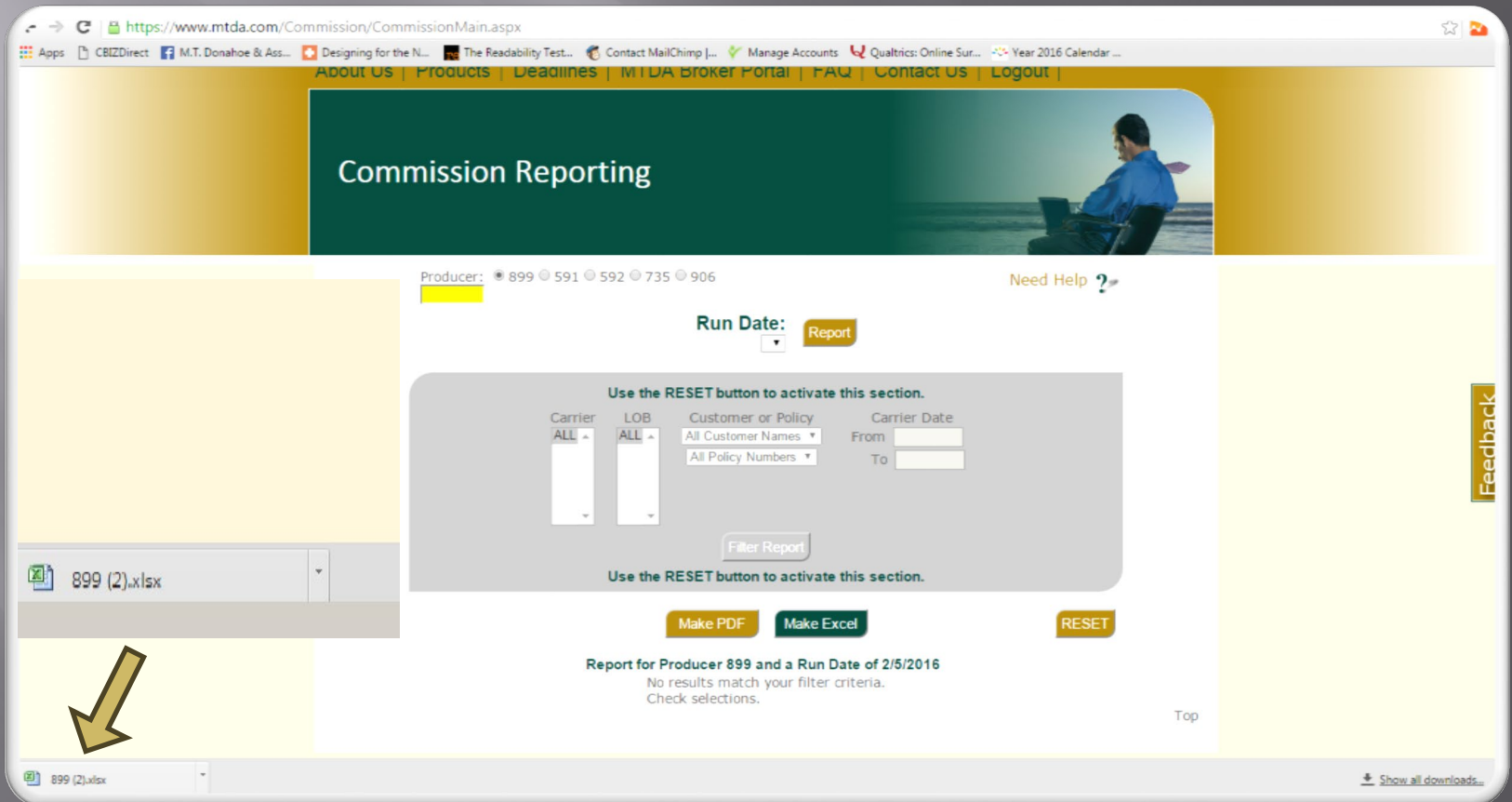
Saving Your Excel File

If you click on “Make Excel,” you will then see this box. Click “Open” and save it to your computer (various browsers may display the box differently).



Other Browsers

If you click on “Make Excel,” you may see this appear. Click “Open” and save it to your computer (various browsers may display the box differently). Always check your “Download” folder on your computer.



Microsoft Excel

File Home Insert Page Layout Formulas Data Review View DYMOLabel Acrobat QuickBooks

Clipboard Font Alignment Number Styles Cells Editing

A1 Commission Report

CF Grp Hlds Still Missing.xls [Compatibility Mode]

311.xlsx [Read-Only]

Commission Report										
Report for Producer 311 and a Run Date of 12/19/2015										
Carrier	Commission									
Anthem	\$ 1,437.99									
CareFirst Group	\$ 9,608.94									
CareFirst Individual	\$ 618.75									
Kaiser	\$ 2,170.00									
	\$ 13,835.68									

Complete & Return Form for Direct Deposit

[Direct Deposit Form](#)

Totals Details

2336 WVU3 CBIZ M I Donahoe & Associate 251041708 Isian Solomon 1563 Sunshine Pediatrics LLC 06/15/2008 Group 1-50 09/01/2015 \$748.81 BHAC-GRP - RMO MED CDH Medical

Ready

If you select Excel, please note that the first sheet (tab) in the workbook is the total by carrier and the second sheet is the detail page. There is also a link for direct deposit.

Saving Your PDF

If you click on “Make PDF,” your file will look like this and you can save it to your computer.

M. T. Donahoe & Associates, LLC

Prepared Date: December 22, 2015

Report for Producer 311 and a Run Date of 12/19/2015

Totals

Anthem	\$1,437.99
CareFirst Group	\$9,608.94
CareFirst Individual	\$618.75
Kaiser	\$2,170.00
	<u>\$13,835.68</u>

Reports

You can also run various reports from your commission statements. These reports include:

- Year-to-date for a client
- All business by any date range that you select (up to 16 months)

To activate this reporting capability, select the “RESET” button.

The screenshot displays a web-based reporting interface. At the top, there are four main filter sections: 'Carrier' with a dropdown menu showing 'ALL', 'Anthem', 'CareFirst Group', 'CareFirst Individual', and 'Kaiser'; 'LOB' with a dropdown menu showing 'ALL', 'Bonus', 'Dental', 'Medical', 'RX', and 'Vision'; 'Customer or Policy' with two dropdown menus, 'All Customer Names' and 'All Policy Numbers'; and 'Carrier Date' with 'From' and 'To' date pickers set to '11/1/2015' and '11/30/2015' respectively. Below these filters is a 'Filter Report' button. At the bottom of the interface are three buttons: 'Make PDF', 'Make Excel', and 'RESET'. A large yellow arrow points to the 'RESET' button. Below the buttons, the text 'Report reset' is displayed.

Tips if are unable to download

- ❑ Make sure pop-up blocker is off or make mtda.com an ok site for pop-ups
- ❑ Clear browser history
- ❑ Make sure chrome is up-to-date (Under Setting click About and it will check for updates)
- ❑ Check the Chrome Extensions to make sure there aren't any weird ones on (Under Setting click Extensions)