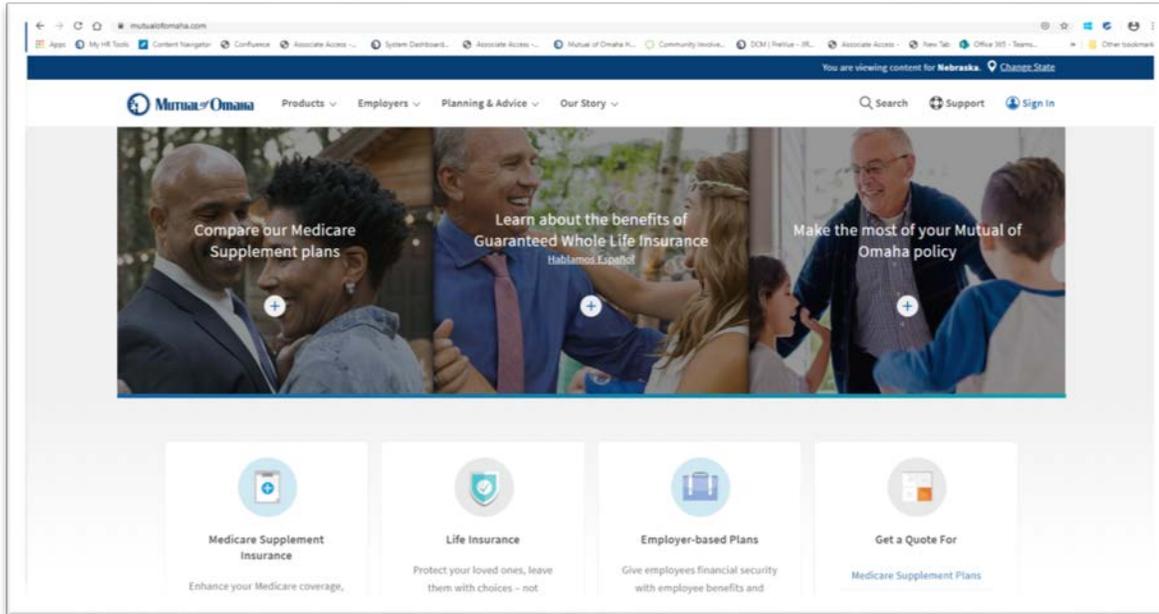


VUE Producer Portal – Accessing and Navigating (DI Product)

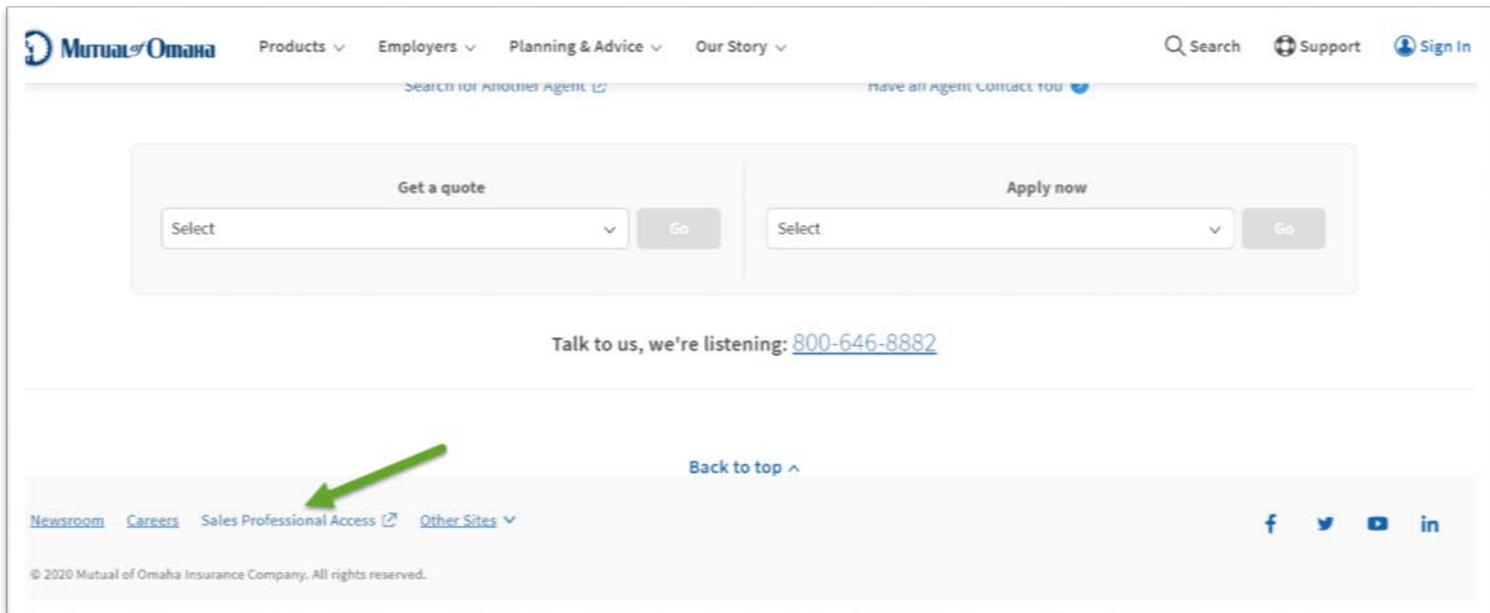
Step 1: Access the Mutual of Omaha Website by clicking the link below:

<https://www.mutualofomaha.com/>

This page will appear:

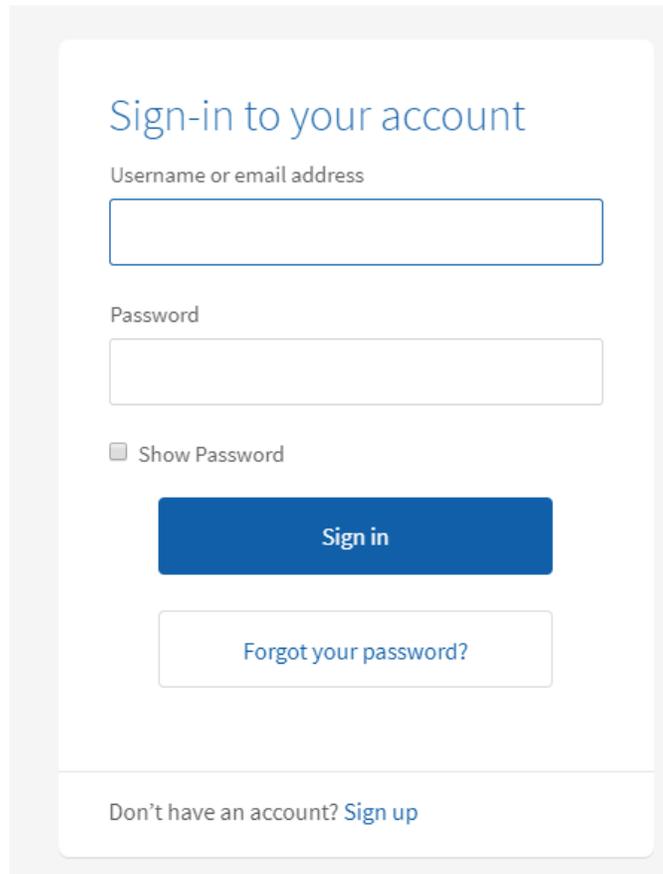


Step 2: Navigate to the bottom of page and click on “Sales Professional Access” link:



VUE Producer Portal – Accessing and Navigating (DI Product)

Step 3 : Enter Producer Credentials



Sign-in to your account

Username or email address

Password

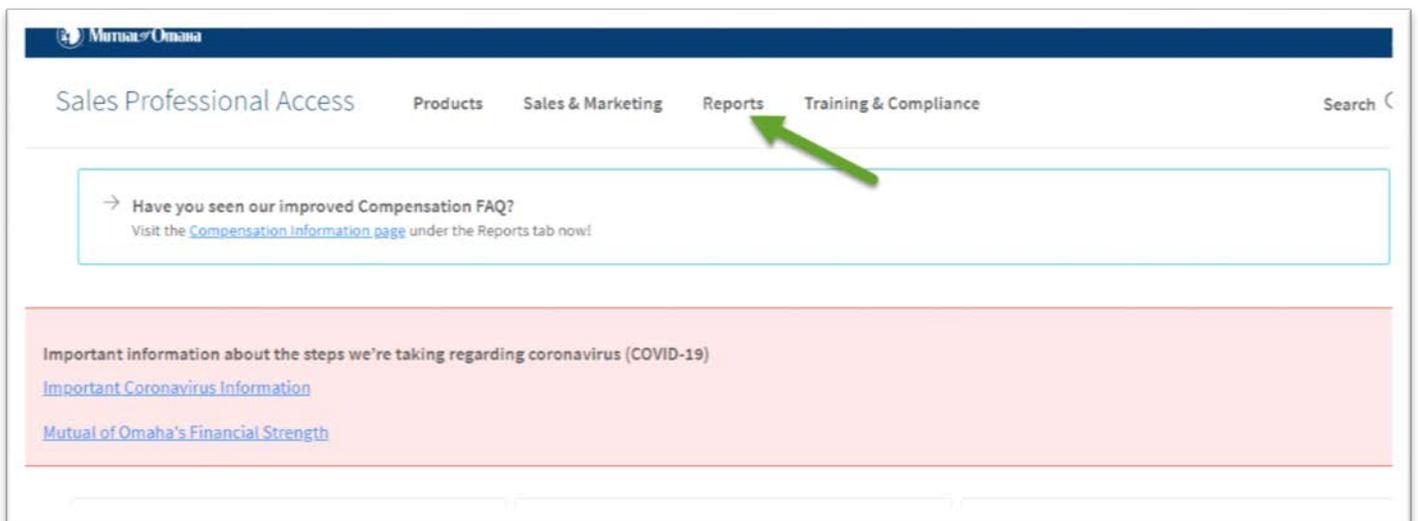
Show Password

[Sign in](#)

[Forgot your password?](#)

Don't have an account? [Sign up](#)

Step 4 : Click on reports



Mutual of Omaha

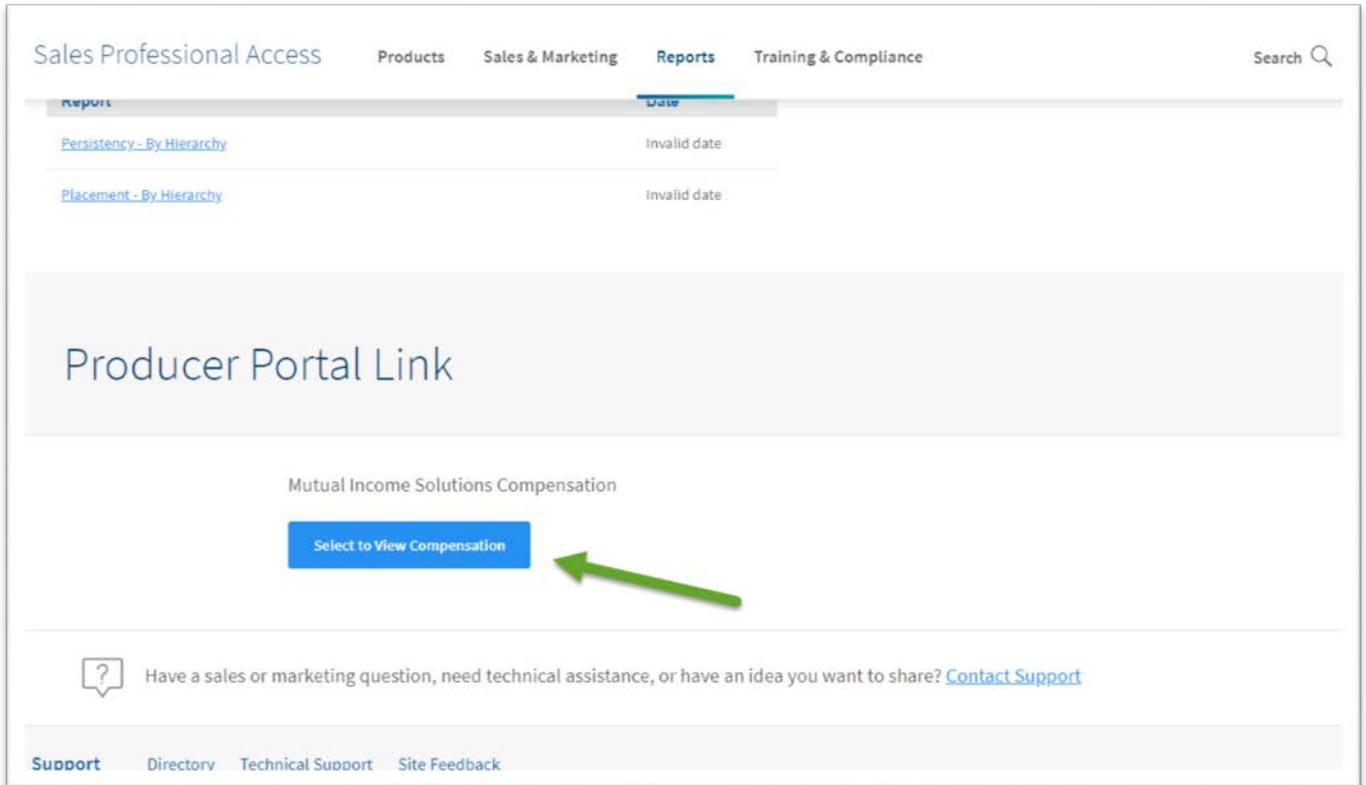
Sales Professional Access Products Sales & Marketing **Reports** Training & Compliance Search

→ Have you seen our improved Compensation FAQ?
Visit the [Compensation Information page](#) under the Reports tab now!

Important information about the steps we're taking regarding coronavirus (COVID-19)
[Important Coronavirus Information](#)
[Mutual of Omaha's Financial Strength](#)

VUE Producer Portal – Accessing and Navigating (DI Product)

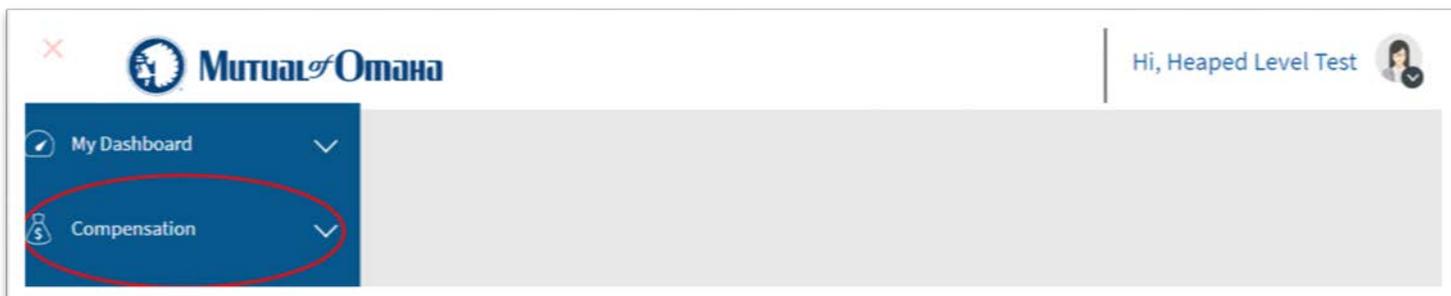
Step 5 : Navigate to the bottom of page and click on “Select to View Compensation”:



Step 6 : Click on the three horizontal lines to the left of the Mutual of Omaha Logo



Step 7 : Click on. 'Compensation'



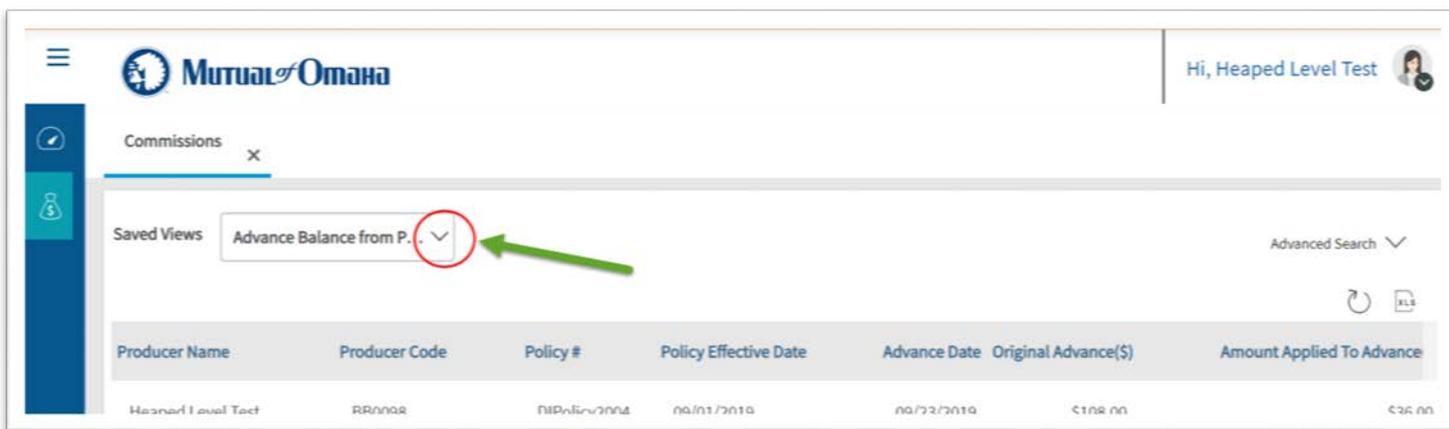
VUE Producer Portal – Accessing and Navigating (DI Product)

Step 8 : Click on Commissions Sub-module under ‘Compensation’

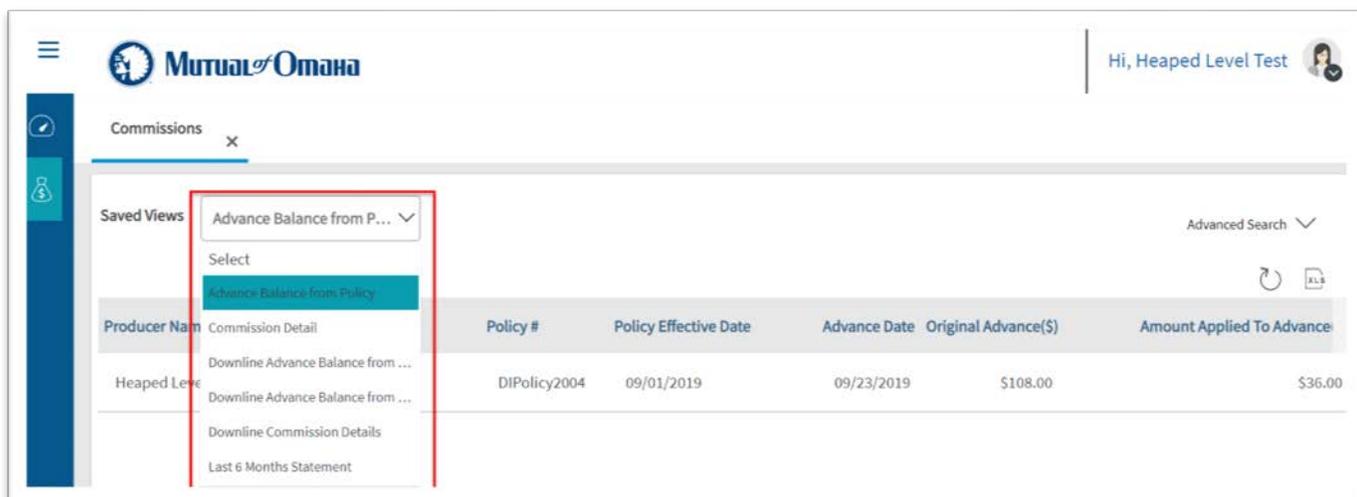


Step 9 :

a. Click on ‘Saved Views’ drop down arrow



b. Choose from ‘Advance Balance from policy/Commission Detail/Downline Advance Balance from agent/Downline Advance Balance from policy/Downline Commission details/Last 6 months statement’ smartVUE under saved view drop-down.



VUE Producer Portal – Accessing and Navigating (DI Product) Additional Information

Advance Balance from policy smartVue

By using this smartVUE producer will be able to view advance balance left on policy

- Click on the **VIEW MORE** button
 - Note: View More functionality is available in all smartVue's with the exception of Advance Balance from Policy

The screenshot shows the Mutual of Omaha VUE Producer Portal interface. The user is logged in as 'Hi, Comp Test MGA 2'. The page displays a table of advance balances. A green arrow points to a 'VIEW MORE' button circled in red at the end of the first row.

Producer Name	Producer Code	Policy #	Policy Effective Date	Advance Date	Original Advance(\$)	Amount Applied To Advance(\$)	
Comp Test MGA 2	BB0082	DIPolicy2004	09/01/2019	09/23/2019	\$168.00	\$42.00	VIEW MORE

- Advance Balance is shown

The screenshot shows the expanded view of the advance balance. The 'Advance Balance(\$)' field is circled in red.

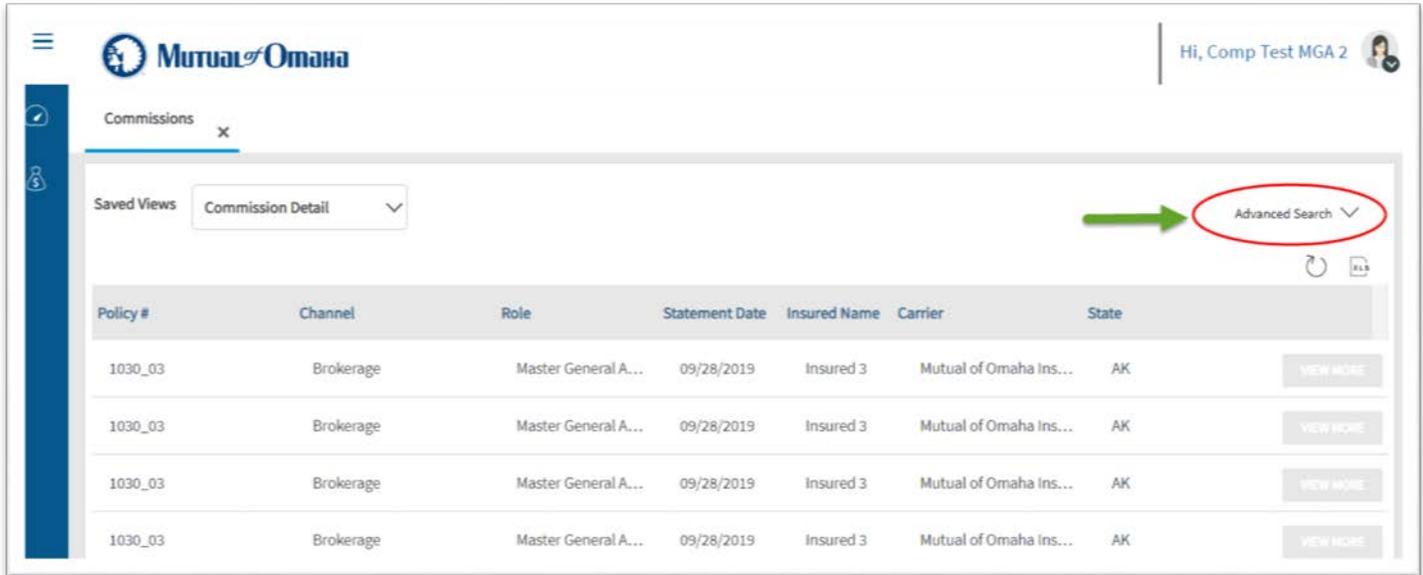
Producer Name	Producer Code	Policy #	Policy Effective Date	Advance Date	Original Advance(\$)	Amount Applied To Advance(\$)	
Comp Test MGA 2	BB0082	DIPolicy2004	09/01/2019	09/23/2019	\$168.00	\$42.00	VIEW LESS
Advance Balance(\$)		Product Disability Income	Product Item Disability Base Coverage - D90	Product Item Type Base Coverage			
-126							

VUE Producer Portal – Accessing and Navigating (DI Product)

Commission Details smartVue

Here user should be able to view the total commission Agent earned per policy, here user can use 'Advanced Search' to filter out the commission/Advance/Garnishment/Override earned by Insured

- Click on Advance Search.



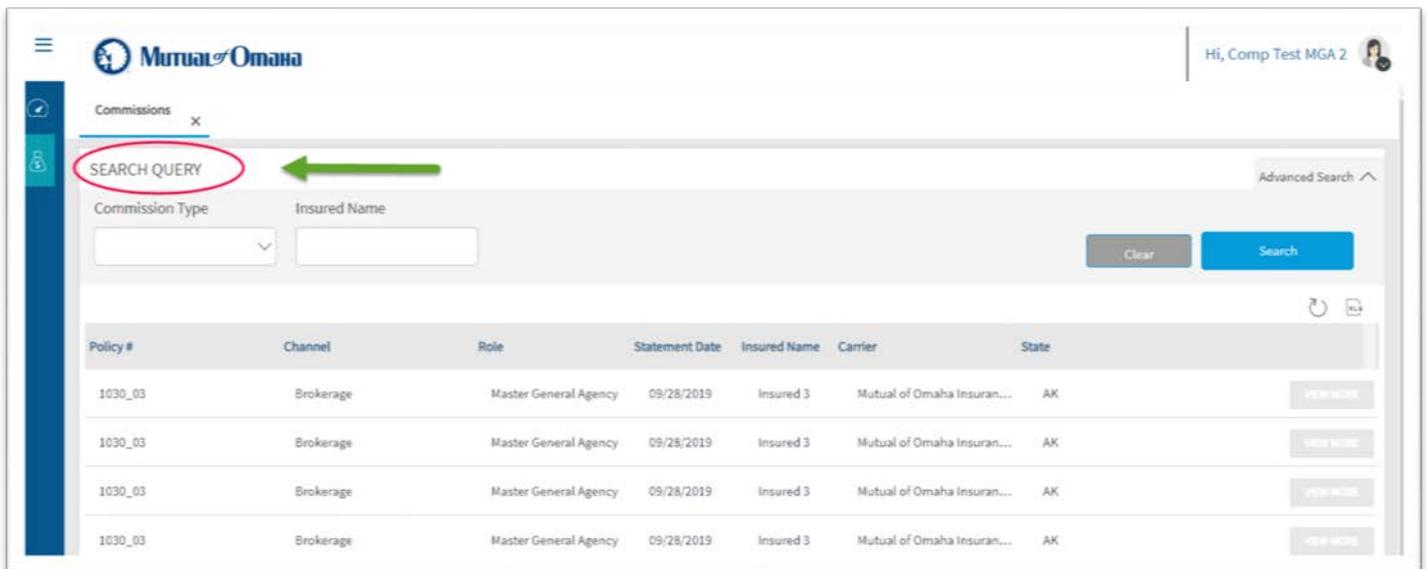
Commissions x

Saved Views: Commission Detail

Advanced Search

Policy #	Channel	Role	Statement Date	Insured Name	Carrier	State	
1030_03	Brokerage	Master General A...	09/28/2019	Insured 3	Mutual of Omaha Ins...	AK	VIEW MORE
1030_03	Brokerage	Master General A...	09/28/2019	Insured 3	Mutual of Omaha Ins...	AK	VIEW MORE
1030_03	Brokerage	Master General A...	09/28/2019	Insured 3	Mutual of Omaha Ins...	AK	VIEW MORE
1030_03	Brokerage	Master General A...	09/28/2019	Insured 3	Mutual of Omaha Ins...	AK	VIEW MORE

- Search Query is visible



Commissions x

SEARCH QUERY

Advanced Search

Commission Type: [Dropdown]

Insured Name: [Text Input]

Clear Search

Policy #	Channel	Role	Statement Date	Insured Name	Carrier	State	
1030_03	Brokerage	Master General Agency	09/28/2019	Insured 3	Mutual of Omaha Insuran...	AK	VIEW MORE
1030_03	Brokerage	Master General Agency	09/28/2019	Insured 3	Mutual of Omaha Insuran...	AK	VIEW MORE
1030_03	Brokerage	Master General Agency	09/28/2019	Insured 3	Mutual of Omaha Insuran...	AK	VIEW MORE
1030_03	Brokerage	Master General Agency	09/28/2019	Insured 3	Mutual of Omaha Insuran...	AK	VIEW MORE

VUE Producer Portal – Accessing and Navigating (DI Product)

Commission Details SmartVue - continued

1. Click on Commission Type down arrow
2. Select Commission from dropdown menu
3. Input Insured Name
4. Click Search

Commissions x

SEARCH QUERY

Commission Type: Commission (1)

Insured Name: DI Policy2004 (3)

Clear Search (4)

Channel	Role	Statement Date	Insured Name	Carrier	State
Brokerage	Master General Agency	09/28/2019	Insured 3	Mutual of Omaha Insuran...	AK
Brokerage	Master General Agency	09/28/2019	Insured 3	Mutual of Omaha Insuran...	AK
1030_03	Brokerage	09/28/2019	Insured 3	Mutual of Omaha Insuran...	AK
1030_03	Brokerage	09/28/2019	Insured 3	Mutual of Omaha Insuran...	AK

➤ Query results is shown

Commissions x

SEARCH QUERY

Commission Type: Commission

Insured Name: DI policy2004

Clear Search

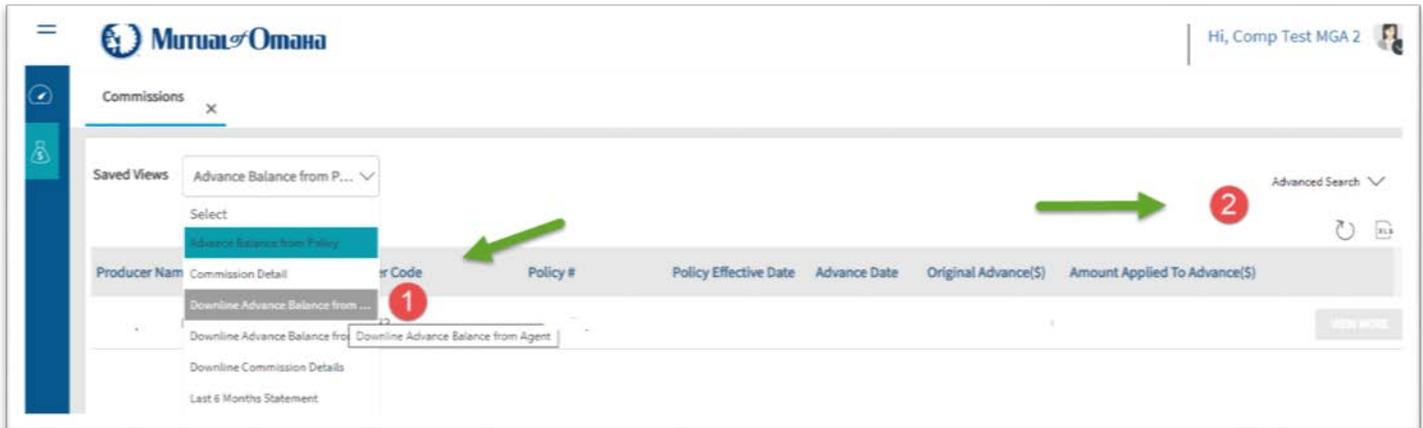
Policy #	Channel	Role	Statement Date	Insured Name	Carrier	State
DI Policy2004	Brokerage	Master General Agency	09/23/2019	DI Policy2004	Mutual of Omaha Insuran...	NE

VUE Producer Portal – Accessing and Navigating (DI Product)

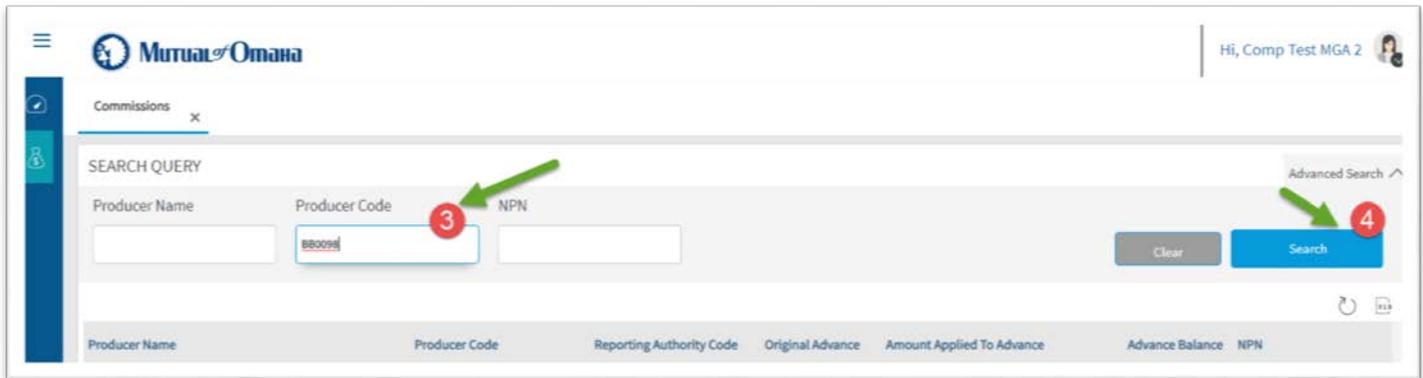
Downline Advance Balance from agent smartVue

By using this smartVUE, Agent can see his Downline(s) Advance Balance. By using Advanced Search, user can search by specific Producer by using his Name/Code/NPN.

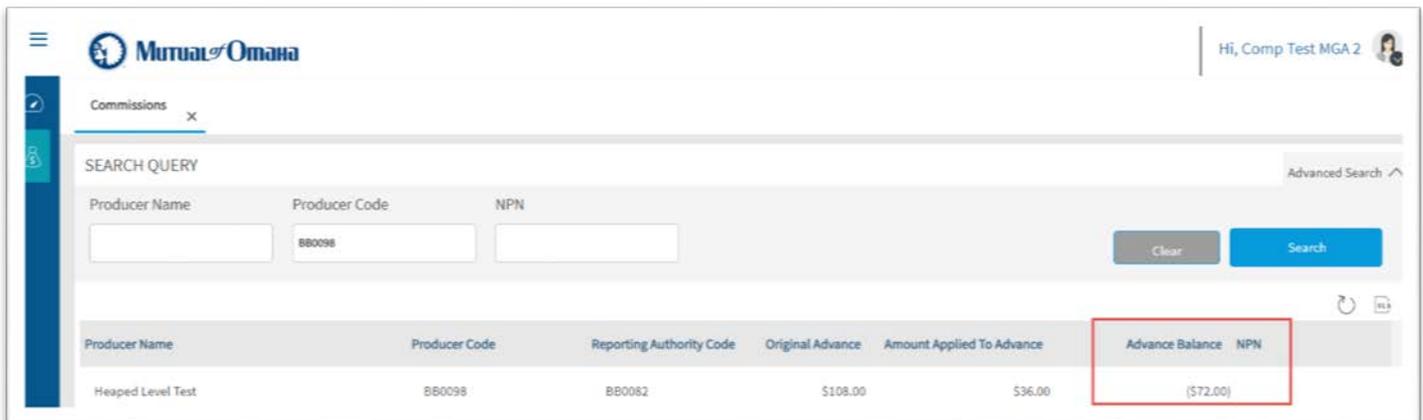
1. Click on Down line Advance Balance from Agent saved views
2. Click on Advance Search



3. Input Producer Code
4. Click Search



➤ Downline Advance Balance from agent Query results is shown



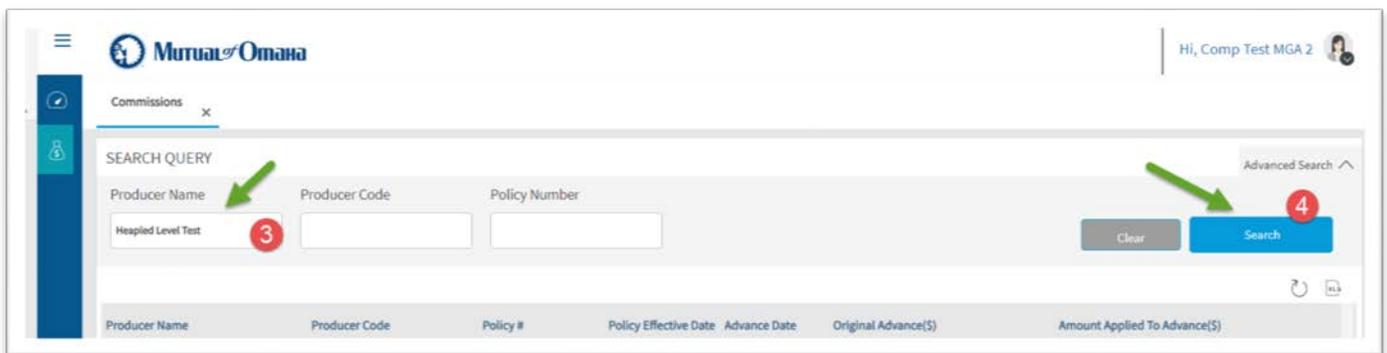
VUE Producer Portal – Accessing and Navigating (DI Product) Downline Advance Balance from policy SmartVue

Here Agent can see his Downlines Advance Balance by Policy. By using Advance Search user can enter the Policy/Producer details to see specific Policy details of his downline.

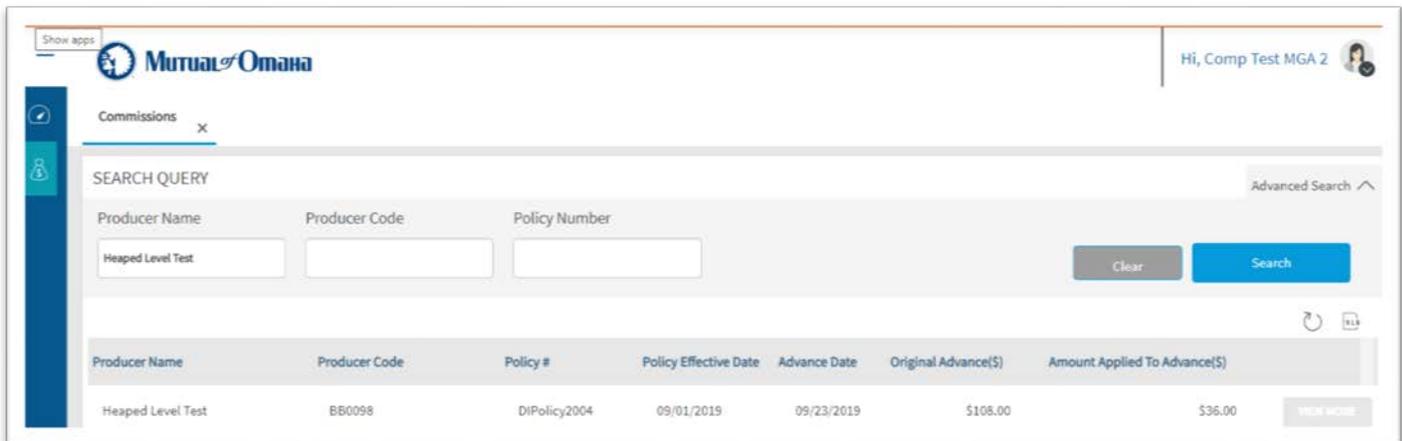
1. Click on 'Down line Advance Balance from Policy' saved views
2. Click on Advance Search



3. Input Producer Name
4. Click Search



➤ Downline Advance from Policy Query Results is Shown



VUE Producer Portal – Accessing and Navigating (DI Product)

Downline Commission details smartVUE

In this smartVUE, agent can view his downline commission details. By using Advance search, user can filter to view the specific producer details.

1. Click on 'Downline Commission Details' saved views
2. Click on Advance Search

The screenshot shows the Mutual of Omaha Commissions page. A dropdown menu for 'Saved Views' is open, with 'Downline Commission Details' highlighted and marked with a red circle '1'. A green arrow points to the 'Advanced Search' button, which is also marked with a red circle '2'. Below the dropdown, a table lists commission details for two policies.

Policy #	Commission Detail	Producer Name	Producer Code	Channel	Role	Statement Date	Insured Name	VIEW MORE
1030_03	Downline Advance Balance from ...	Comp Test MGA 2	BB0082	Brokerage	Master General Agency	09/28/2019	Insured 3	VIEW MORE
1030_03	Downline Commission Details	Comp Test MGA 2	BB0082	Brokerage	Master General Agency	09/28/2019	Insured 3	VIEW MORE

3. Input Policy # or other Search criteria
4. Enter To Date (optional)
5. Click Search

The screenshot shows the Mutual of Omaha Commissions page with the search query form. The 'Policy #' field contains 'DIpolicy2004' (marked with a red circle '3') and the 'To Date' field contains '04/01/2020' (marked with a red circle '4'). The 'Search' button is marked with a red circle '5'. Below the search form, a table shows the search results.

Policy #	Producer Name	Producer Code	Channel	Role	Statement Date	Insured Name
DIpolicy2004	Comp Test MGA 2	BB0082	Brokerage	Master General Agency	09/28/2019	Insured 3

➤ Downline Commission details Query Results is Shown

The screenshot shows the Mutual of Omaha Commissions page with the search results table. The table displays the details for the policy 'DIpolicy2004'.

Policy #	Producer Name	Producer Code	Channel	Role	Statement Date	Insured Name
DIpolicy2004	Comp Test MGA 2	BB0082	Brokerage	Master General Agency	09/28/2019	DI Policy2004

VUE Producer Portal – Accessing and Navigating (DI Product)

Last 6 months statements smartVUE

In this smartVUE, agent view a VUE generated statement

1. Click on 'Last 6 Months Statement saved views
2. Click on Statement Date hyperlink
3. Click on commission statement to open

Mutual of Omaha
Hi, Comp Test MGA 2

commissions x

Saved Views: Advance Balance from P...
Select
Advance Balance from Policy
Downline Advance Balance from ...
Downline Advance Balance from ...
Downline Commission Details
Last 6 Months Statement

Producer Name	Commission Detail	Policy Code	Policy #	Policy Effective Date	Advance Date	Original Advance(\$)	Amount Applied To Advance(\$)
				/2019	'2019		\$42.00

Mutual of Omaha
Hi, Comp Test MGA 2

commissions x

Saved Views: Last 6 Months Statement

Payee Name	Statement Date	Opening Balance (\$)	Closing Balance (\$)	Amount (\$)	Type
Comp Test MGA 2	05/22/2020	0	-5199.98	0	Commission
Comp Test MGA 2	12/31/2019	0	1561.1	1561.1	Commission

Mutual of Omaha
Hi, Comp Test MGA 2

Commissions x

Saved Views: Last 6 Months Statement

Payee Name	Statement Date	Opening Balance (\$)	Closing Balance (\$)	Amount (\$)	Type
Comp Test MGA 2	12/31/2019	0	1561.1	1561.1	Commission

Commission State...pdf

VUE Producer Portal – Accessing and Navigating (DI Product)

Last 6 months statements smartVUE -continued

➤ PDF Statement



Commission Statement Summary
From 09/29/2019 To 12/31/2019

Broker Information
Comp Test MGA 2 ID : PC-BB0082
4517 longhorn st
Cass, AZ 45425

Commissions Contact Info
3300 MUTUAL OF OMAHA PLZ
OMAHA, NE 68175

Commission Summary Information	
Opening Balance	\$0.00
Miscellaneous	
Commissions	\$0.00
Overrides	\$1,561.10
Other	\$0.00
Bonus	\$0.00
Nonmonetary Bonus	\$0.00
Subtotal	\$1,561.10
Current Amount Paid	\$1,561.10
Current Amount Held	\$0.00
Closing Balance	\$1,561.10
Payment Mode	Check
Pending Commissions	\$0.00

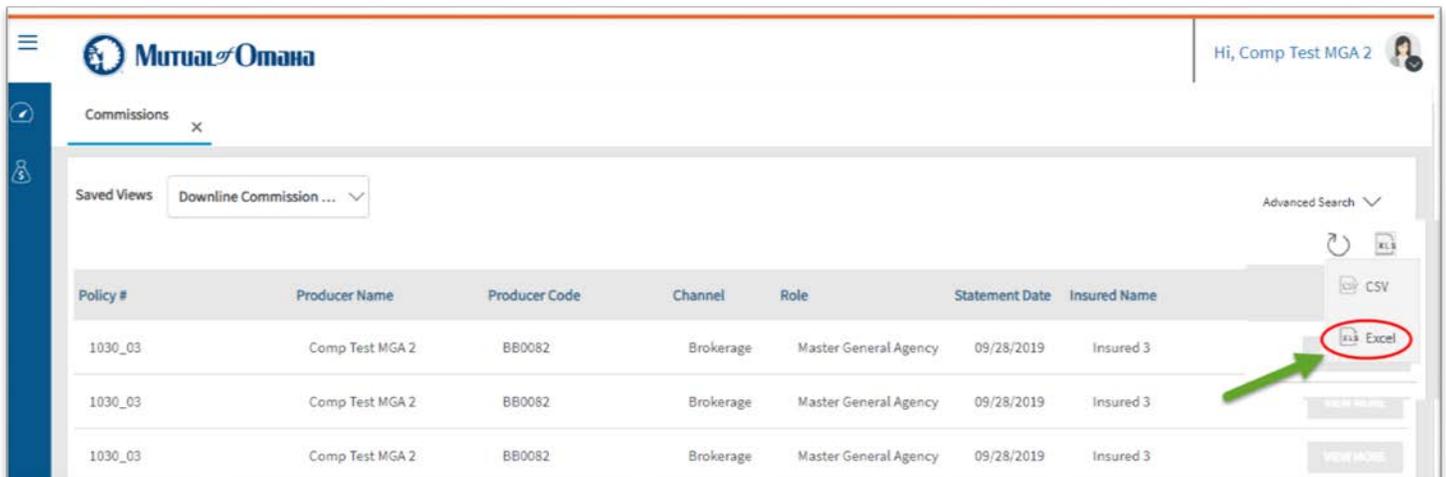
REASON DESCRIPTION : ADJ = Adjustment; ADVOFF ADJ = Advance Writeoff Adjustment; REN FEE = Appointment Renewal Fee; COMM = Commissions; DEB ADJ = Debit Balance Adjustment; DED = Deduction; FEE = Fee; GARN = Garnishment; INT = Interest Charge; NET ADJ = Netted Adjustment; OVR = Override; PMT = Payment Applied; PEND = Pending commission missing information; PT = Plan Transfer; REFUND = Refund
ADVANCE REASON DESCRIPTION : APP ADV = Applied to Advance; NEW ADV = New Advance; NO ACT = No Activity; REC TRM = Reconciled Advance due to policy term; REC + = Reconciled Advance plus commissions due; REC - = Reconciled Advance with balance due

Note:By using Advance Search over the smartVUE, user can search for payee statements with specific statement date

Special Feature- Download details in Excel Format:

Saved Views SmartVues allow the producer download details in Excel or CSV format

➤ Float mouse pointer over the xls icon and select Excel from dropdown

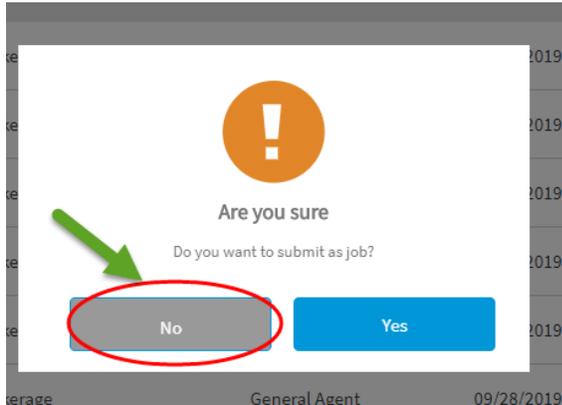


The screenshot shows the Mutual of Omaha Commissions page. At the top, there is a header with the Mutual of Omaha logo and the user's name "Hi, Comp Test MGA 2". Below the header, there is a "Commissions" tab and a "Saved Views" dropdown menu. The main content area displays a table with columns: Policy #, Producer Name, Producer Code, Channel, Role, Statement Date, and Insured Name. The table contains three rows of data. To the right of the table, there is a dropdown menu for downloading the data. The dropdown menu is open, showing options for "CSV" and "Excel". A green arrow points to the "Excel" option, which is circled in red.

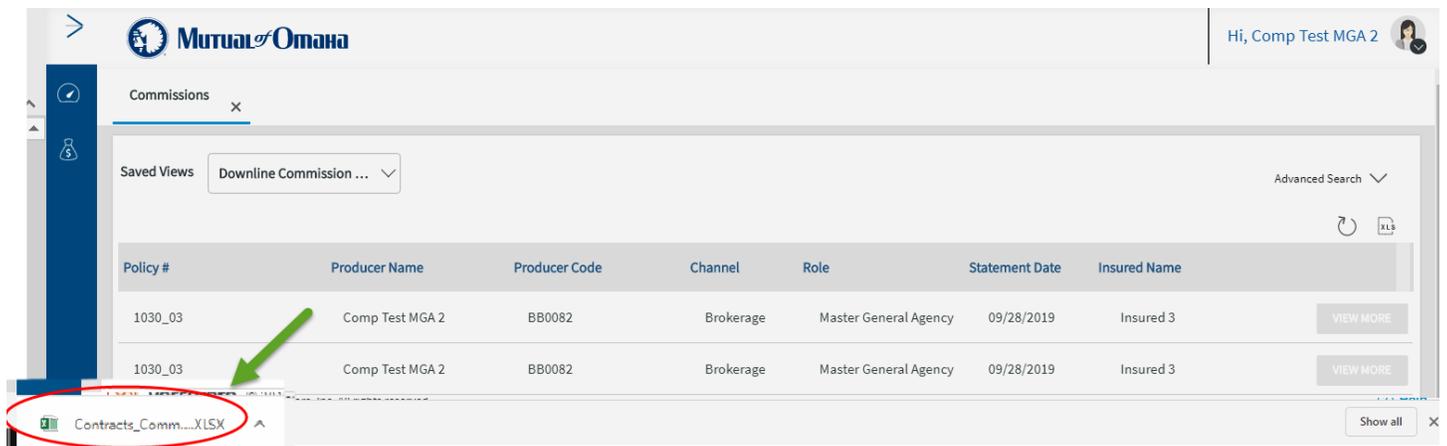
VUE Producer Portal – Accessing and Navigating (DI Product)

Special Feature- Download details in Excel Format: - continued

- Click No



- Statement is downloaded in PDF format
- Click on commission statement to open



- Excel spreadsheet opens.

