

The GWIC Agent Portal User Guide



Welcome to your new agent portal

You told us you want to work with a company that makes it easy to manage your business. That's why our new agent portal has been completely redesigned with you in mind.

The new portal is easy to navigate and simple to use and will provide several improvements you requested:

- Updated, mobile-friendly design
- Simple, user-friendly navigation
- Efficient, easy-to-use functionality

You'll have quick access to reports, commissions, training materials, sales tools, and supplies. Depending on your login credentials, you'll see different buttons and links than what is displayed in this user guide because they are catered to you and your needs.

You will have everything you need to manage and build your business right at your fingertips.

Before we get started

You can find the new agent portal by visiting the [same web address](#) as you bookmarked for MyNavigator®. Then enter the same username and password you have been using for that website.

If you want to skip this full user guide and get started faster, please view the [Quick Start Guide](#).

If you have questions, you can contact Agent Care by phone at 866-252-5594, option 2, Monday through Friday, 7:30 a.m. to 5 p.m. Central time, or via email at mlagentsupport@americanenterprise.com.

Thank you for providing valuable feedback to help us serve you better. We appreciate your business.

Sincerely,

Great Western Insurance Company (GWIC®)

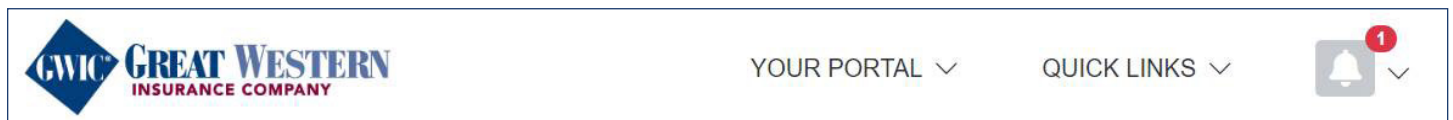
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Navigation

No matter which page you visit, you will have access to the top and bottom navigation. The top navigation is known as the header, and the bottom navigation is called the footer.

What you'll find in the header



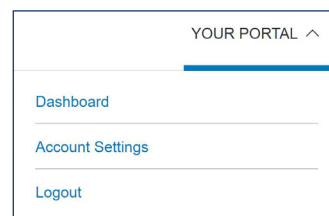
Great Western Insurance Company logo

When you click on GWIC's logo, it will bring you back to the Dashboard, which is the homepage.

Your Portal

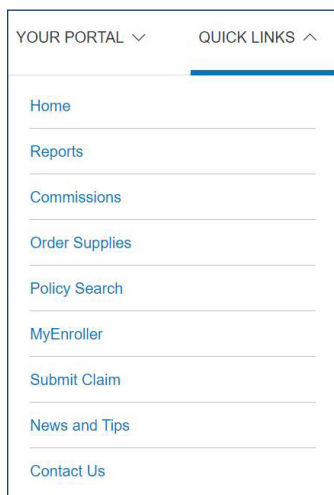
When you click on the "Your Portal" dropdown menu, you'll see these options:

- Dashboard: Click to revisit the Dashboard.
- Account Settings: Select to change your email address, phone number, or mailing address.
- Logout: Logout of the agent portal.



Quick Links

When you click on the "Quick Links" dropdown menu, you'll have easy access to a variety of pages, such as Reports, Commissions, MyEnrollerSM, Contact Us, and others, depending on your login credentials.

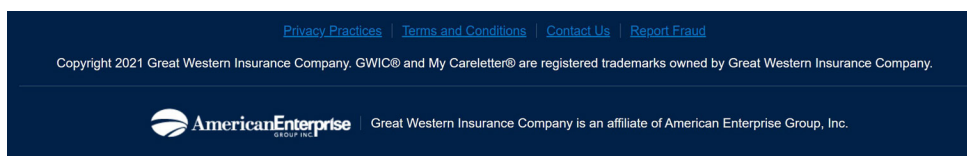


Alerts

If you see a number highlighted in red on the bell icon in the top right corner of the screen, click on it to read time-sensitive alerts. The red number will only appear when a new alert has been posted.

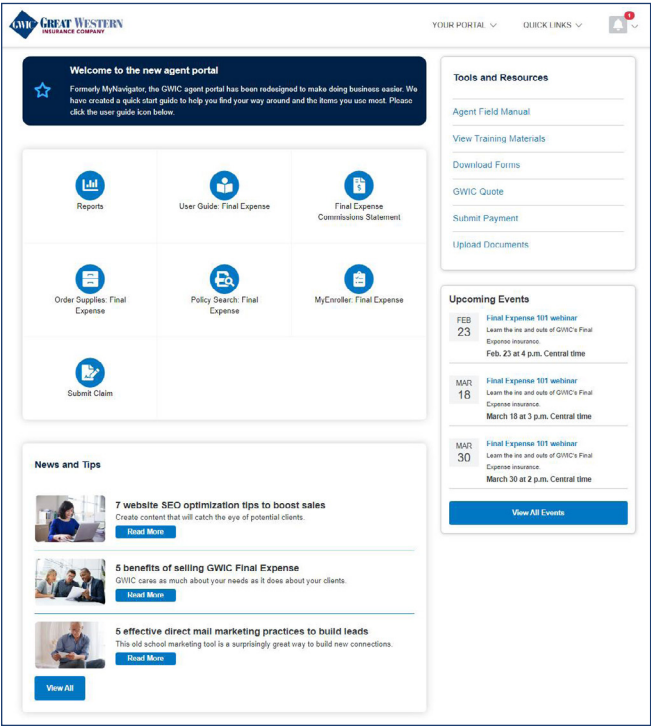


What you'll find in the footer



The footer contains GWIC's copyright information, legal notices, and a link to the Contact Us page.

Meet your new Dashboard



Please note: Depending on your login credentials, you'll see different buttons and links than what is displayed here because they are catered to you and your needs.

When you land on the agent portal's homepage, you'll see your Dashboard — the space between the header and footer.

Buttons

The icons on the top left of the Dashboard are quick buttons to the most frequently used pages on the site, such as Reports, Commissions, and ordering supplies.



Reports



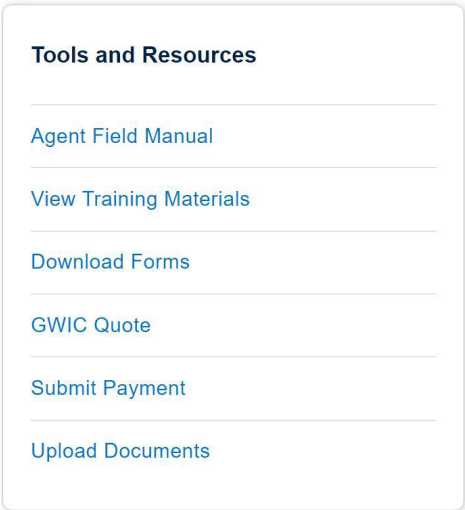
Order Supplies



Submit Claim

Tools and Resources

The links in the top right of the Dashboard direct you to helpful items, such as training materials, access to forms, and more.



Please note: The “Upload Documents” link gives you the ability to upload supporting documents. Please click on the “MyEnroller” button to submit electronic applications.

Upcoming Events

Under the Tools and Resources, the Upcoming Events section lists webinars, conferences, and other important dates. Be sure to click the “View All Events” button to see future events.

Upcoming Events

FEB
23

Final Expense 101 webinar
Learn the ins and outs of GWIC's Final Expense insurance.
Feb. 23 at 4 p.m. Central time

MAR
18

Final Expense 101 webinar
Learn the ins and outs of GWIC's Final Expense insurance.
March 18 at 3 p.m. Central time


MAR
30

Final Expense 101 webinar
Learn the ins and outs of GWIC's Final Expense insurance.
March 30 at 2 p.m. Central time

[View All Events](#)

Tip bar

Depending on when you log into the agent portal, you may see a blue bar above or below the quick buttons. Look for quick helpful notes or tips in this space. For example, when the agent portal was launched, a welcome message and directions to the user guide were present.




Welcome to the new agent portal

Formerly MyNavigator, the GWIC agent portal has been redesigned to make doing business easier. We have created a quick start guide to help you find your way around and the items you use most. Please click the user guide icon below.


News and Tips

Scroll below the quick buttons to find the News and Tips section. This is where you'll see the latest GWIC news and tips articles. Click the “View All” button to visit the News and Tips page and read all available articles.


News and Tips



7 website SEO optimization tips to boost sales
Create content that will catch the eye of potential clients.
[Read More](#)



5 benefits of selling GWIC Final Expense
GWIC cares as much about your needs as it does about your clients.
[Read More](#)



5 effective direct mail marketing practices to build leads
This old school marketing tool is a surprisingly great way to build new connections.
[Read More](#)

[View All](#)

Reports page

You can reach the Reports page two ways: Click on the “Reports” button on the Dashboard or click on its link within the Quick Links dropdown in the header. When you land on the Reports page, you’ll see a list of reports with brief descriptions. These are the reports available to you based on your login credentials.

Please note: If you don’t see a report you normally use, read the descriptions to see if the report has been renamed. If you’re still unable to find what you need, please contact Agent Care.

Commissions page

You can reach the Commissions page two ways: Click on the “Commission Statements” button on the Dashboard or click on its link within the Quick Links dropdown in the header.

Commissions

Historical commissions by policy report [View](#)

Final expense commissions statement [View](#)

Commissions

Select a statement date to view all statements generated during that time period. If you have direct reports and would like to view their commissions, select View Downline Statements. To view all statements generated for one individual, select the Agent Name. The Statement Date Range and Agent Name selections will display Advances and Commissions.

Choose one of the following: [FAQ - Commission Schedule](#)

☐ Commission Date: 6/20/2020 Select this option to view commissions, including Adjustments on all business.

☐ Statement Date Range: Start Date to End Date Select this option to view all commission types on all business written within a specified date range.

☐ Advance Date: No Advance Date data found

[View Commissions](#)

MyEnroller page

You can reach the MyEnroller page two ways: Click on the “MyEnroller” button on the Dashboard or click on its link within the Quick Links dropdown in the header.

Anytime. Anywhere. MyEnroller.

When you use MyEnroller

- Policies are issued quicker
- You get paid sooner
- Always have the correct forms, rates and payment options
- Works with or without Internet connection

Create a quote in seconds with NO username/password requirements for Final Expense: [CWIC Quote](#)

MyEnroller*

[Install](#)

Works with or without Internet connection

[Download Instructions and User Guide](#)

[View minimum device requirements](#)

[Windows 10 Internet Browser Instructions](#)

iPad

[Install](#)

Works with or without Internet connection

[iPad User Guide](#)

Device requirements:

- iPad Air or iPad Mini 2 or newer iPad model with iOS version 11 or higher
- 1 GB of free space
- WiFi (with internet access) Required to download and

Order Supplies page

You can reach the Order Supplies page two ways: Click on the “Order Supplies” button on the Dashboard or click on its link within the Quick Links dropdown in the header. When you click on the link, you'll be directed to GWIC's online ordering website.

Forms page


You can reach the Forms page by clicking on the “Download Forms” link on the Dashboard under Tools and Resources. It contains forms you cannot order on GWIC's ordering website or state specific claims forms.

Forms


**Can't find a form?**
If a form you need isn't listed here, please visit GWIC's ordering website to download a copy of it.
[Find More Forms](#)




Authorization for the use and disclosure of information – life insurance
This form allows the insured to grant permission to release information to individuals.
[Download Form](#)




Death benefit claim form
Use this form to disclose a covered person's death.
[Download Form](#)




Absolute assignment
Use this form to change the ownership of a policy. Do NOT use it to assign benefits to others.
[Download Form](#)




Beneficiary designation
Use this form to designate or change the beneficiaries on a Final Expense policy.
[Download Form](#)




Accelerated benefit request
Use this form to request the Accelerated Death Benefit for a Final Expense policy.
[Download Form](#)




Request for service
Use this form to update a name, address, and beneficiary or request a duplicate policy.
[Download Form](#)



Cash surrender value request
Use this form to cancel or surrender a policy in exchange for its cash value.
[Download Form](#)



Policy loan agreement
Use this form to request a loan against the value of a policy.
[Download Form](#)





Automatic premium withdrawal
Use this form to authorize premium payments through bank draft and update an account.
[Download Form](#)


Training page

You can reach the Training page by clicking on the “View Training Materials” link on the Dashboard under Tools and Resources. It contains a variety of useful training items, from videos and user guides to past webinars and emails.


Final Expense Training



Past Email Communications



News and Tips


Webinars


User guides



Final Expense agent field manual
GWIC's agent field manual teaches you the ins and outs of selling Final Expense insurance.
[Download Document](#)



MyEnroller user guide on Windows
This full user guide walks you through using MyEnroller on Windows.
[Download Document](#)


MyEnroller user guide on iPad
This full user guide walks you through using MyEnroller on your iPad.
[Download Document](#)

Videos


New agent welcome series: Tom Swink


New agent welcome series: Dennis Case


New agent welcome series: Aaron Young

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Submit Claim

You can reach the Submit Claim page two ways: Click on the “Submit Claim” button on the Dashboard or click on its link within the Quick Links dropdown in the header.

GWIC Quote

You can reach the GWIC Quote by clicking on the “GWIC Quote” link on the Dashboard under Tools and Resources.

Sales Incentives page

You can reach the Sales Incentives page by clicking on the “Sales Incentives” button on the Dashboard. You will only see this button if sales incentives are currently being offered.

