

## Broker Evolve Portal Commission's payment setup

### I. Payee Banking Info

a. For a broker agent/agency to add their banking information in the Evolve portal, they will want to follow these steps:

i. Click on MY ACCOUNT, on the purple banner on the left.

The screenshot shows the EvolveNXT Dashboard. On the left is a purple navigation menu with 'MY ACCOUNT' selected. Below it, a sub-menu is open, showing 'Payee Info' highlighted. Two blue arrows point from the 'MY ACCOUNT' menu item and the 'Payee Info' sub-menu item to the main dashboard area. The dashboard features several widgets: 'Ready To Sell' (table with columns: Credentials, Number of Expired, Status), 'Notifications', 'Birthdays' (0), 'Commercial Book of Business' (chart), and 'Commissions' (table).

ii. Go to the tab that says PAYEE INFO, and then choose EDIT PAYEE INFO.

1. Once you have added/edited your payee info, you will need to click on SEND CHANGE REQUEST.
2. You will then need to do the same thing for the EDIT BANKING INFO (ACH) to receive direct deposit.
  - a. Select ACH: Automated Clearing House - direct deposit option (recommended)
  - b. To receive a check by mail leave the Banking info section empty. Payee section must be completed. (Please be advised paper checks take an additional 2-3 weeks for delivery)

The 'EDIT PAYEE INFO' form contains the following fields and options:

- Name** (text input)
- Address** (text input)
- City** (text input)
- State** (dropdown menu)
- Zip** (text input)
- SSN / TIN** (text input with masked characters)
- Show / Hide Information
- CANCEL EDIT** (button)
- SEND CHANGE REQUEST** (button)
- Banking Method** (dropdown menu, currently set to ACH)
- Account Number** (text input)
- Verify Account Number** (text input)
- Routing Number** (text input)
- Financial Institution** (text input)
- Account Type** (dropdown menu, currently set to CHECKING)
- Show / Hide Information