



Dickerson's Broker Commission Portal



DICKERSON
INSURANCE SERVICES
AN **ALERA GROUP** COMPANY


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Registration

- A registration link will be sent to you via email
- This link will be active for seven days
- Tipalti generates the unique links not Dickerson
- There is only one registered email per profile per profile
- Passwords
 - Should be eight characters long
 - Should include at least one capital letter
 - Should include at least one lower case letter
- Two step verification process for security
 - Can use a landline
 - Works best with a mobile phone
- Login and complete your profile

Logging in to Tipalti

- Use Google Chrome as web browser 
- Your email address is your username, contact us to change your email and reregister to login
- Passwords can be recovered on the login page
- For security reasons, we do not know your password
- We can reset passwords
- We can reset verification phone numbers



Brokers Portal

DICKERSON
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AUTHORIZED
GENERAL AGENT

Login

Email address

Password

[Forgot password?](#)

Log in

Address

- Agents must update address online through Tipalti both on the address page and on their W-9.
- For your security, Dickerson does not have the authorization to modify this for you.

Address

Payment Method

Tax Forms

Done

Enter Your Information

Please enter your details as they appear on your bank records. P.O. Box is not allowed ⓘ

Type	Company
Contact Email	Nydia@dickerson-group.com
Phone Number ⓘ	+13232718810
First Name ⓘ	NYDIA
Middle Name ⓘ	
Last Name ⓘ	CRUZ
Company	DICKERSON EMPLOYEE BENEFITS, INC.
Address	1918 Riverside Drive
Address 2	
City	Los Angeles
Zip	90039
Country	United States
State	CA

Edit



Next

Address

- A physical address is required to complete this step as a P.O. Box is not allowed on the address page.
- P.O. Box is allowed on your W-9

1 Address 2 Payment Method 3 Tax Forms

You submitted a W-9 form dated 3/12/2018.

If you need to submit a new tax form, click here.

To view the W9 information you submitted [click here.](#)

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Payment Method

- We offer two payment methods: check and direct deposit/ach.
- Tipalti charges you a \$3.00 fee for all checks that are issued and can take a minimum of 7 days to be delivered.
- Direct deposit/ ACH is free to you as Dickerson covers this cost for you. Also the funds will appear in your account 1-3 days after you are notified by email of the deposit.
- You can edit your banking information by clicking on the red “Next” button the bottom of the page. When the new page loads, click on “Edit” to modify your information. When you are satisfied with your changes, click on “Next” again to save.
- For added security, Dickerson does not have the ability to modify this information for you.

1 Address 2 Payment Method 3 Tax Forms 4 Done

Payment Method: Direct Deposit / ACH

Payment method minimum threshold: USD 50.00. No transaction fees.

Name on Account DICKERSON EMPLOYEE BENEFITS, INC.

Bank Name Wells Fargo

Routing Code ⓘ 322271627

Account Number *****1234

Account Type Checking

Back Edit Next

Submitting your W-9

- Dickerson is not allowed to submit your W-9 for you, it must be done by you, online.
- If you change your Tax ID, the change will only be for the future payments, from the date of change, it will not work retroactively.
- You can edit your W-9 by clicking on the red “Next” button at the bottom of the page. When the new page loads, click on “Next” again and click on submit new W-9. When you are satisfied with your changes, click on “Next” again to save.
- The W-9 Form is case and punctuation sensitive. The names must match what was entered in the Address Page

1 Address 2 Payment Method 3 Tax Forms 4 Done

You submitted a W-9 form dated 3/12/2018.
If you need to submit a new tax form, [click here](#).
To view the W9 information you submitted [click here](#).

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First Name ⓘ	NYDIA
Middle Name ⓘ	
Last Name ⓘ	CRUZ

Important Notices

- An important note for any changes to existing profiles: We close our monthly cycle on the 10th of each month, but payment is issued around the 15th.
- If a new registration or changes are made after the 10th, they could take effect the following month instead of the current month. Make all changes before the 9th or after the 15th to ensure accurate payment.



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AUTHORIZED
GENERAL AGENT

English

NYDIA

Accessing Your Commission Statements

- To download your monthly commission statement, click on “Payment History” in the menu on the left-hand side of the screen

Payment Details

Payment History

Invoice History

1 Address 2 Payment Method 3 Tax Forms

Enter Your Information

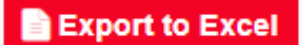
Please enter your details as they appear on your bank records. P.O. Box i












Type	Company
Contact Email	Nydia@dickerson-group.com
Phone Number ⓘ	+13232718810
First Name ⓘ	NYDIA
Middle Name ⓘ	
Last Name ⓘ	CRUZ

Accessing Your Commission Statements

- When the page loads, you will see your payments with the most recent at the top. Click on the red arrow to the right of the payment you would like to see the details for, and the statement will load.

Payments History

 Export to Excel

Approval date 	Amount Submitted	Payment Method	Status	
Mar 13, 2019	USD 63.97	Direct Deposit / ACH	Paid	Download confirmation 
Feb 13, 2019	USD 127.94	Direct Deposit / ACH	Paid	Download confirmation 
Jan 14, 2019	USD 63.97	Direct Deposit / ACH	Paid	Download confirmation 
Dec 14, 2018	USD 63.97	Direct Deposit / ACH	Paid	Download confirmation 
Nov 13, 2018	USD 63.97	Direct Deposit / ACH	Paid	Download confirmation 
Oct 15, 2018	USD 63.98	Direct Deposit / ACH	Paid	Download confirmation 
Sep 12, 2018	USD 63.98	Direct Deposit / ACH	Paid	Download confirmation 
Aug 14, 2018	USD 63.98	Direct Deposit / ACH	Paid	Download confirmation 
Jul 12, 2018	USD 63.98	Direct Deposit / ACH	Paid	Download confirmation 
Jun 13, 2018	USD 63.98	Direct Deposit / ACH	Paid	Download confirmation 

Accessing Your Commission Statements

- To print the statement in its entirety, scroll to the right to download your statement by clicking on the Excel icon, next to the headers of each column, and print it from the Excel spreadsheet.

The screenshot shows a web interface for commission statements. At the top, there are navigation arrows (left and right) and a grey button. Below this, the text 'Is' is visible. A summary table shows financial data:

Paid	Amount submitted:	USD	63.97
Mar 14, 2019	Transaction fee:	USD	0.00
XXXXXXXXXXXXXXXXXX	Net amount:	USD	63.97
XXXXXXXXXXXXXXXXXX	Amount paid:	USD	63.97

Below the table, a red text link says 'Click here to export statement into Excel ↓'. Underneath is a table with columns: 'plit', 'Type', 'IndivOrBus', 'Percent', and 'PolicyDescription'. A yellow Excel icon is positioned above the 'PolicyDescription' column header. The first row of data is: 'omm', 'C', 'I', '75', and 'XXXXXXXXXXXXXXXXXX MED'. A 'Download PDF' button is located to the right of this row. At the bottom, a grey navigation bar is partially visible with a yellow arrow pointing right, and a red text instruction says 'Move navigation bar over to to the right to see more co'.

Payments History



Export to Excel

Approval date 📅	Amount Submitted	Payment Method	Status	
Mar 13, 2019	USD 63.97	Direct Deposit / ACH	Paid	Download confirmation →
Feb 13, 2019	USD 127.94	Direct Deposit / ACH	Paid	Download confirmation →
Jan 14, 2019	USD 63.97	Direct Deposit / ACH	Paid	Download confirmation →
Dec 14, 2018	USD 63.97	Direct Deposit / ACH	Paid	Download confirmation →
Nov 13, 2018	USD 63.97	Direct Deposit / ACH	Paid	Download confirmation →
Oct 15, 2018	USD 63.98	Direct Deposit / ACH	Paid	Download confirmation →
Sep 12, 2018	USD 63.98	Direct Deposit / ACH	Paid	Download confirmation →
Aug 14, 2018	USD 63.98	Direct Deposit / ACH	Paid	Download confirmation →
Jul 12, 2018	USD 63.98	Direct Deposit / ACH	Paid	Download confirmation →
Jun 13, 2018	USD 63.98	Direct Deposit / ACH	Paid	Download confirmation →

Downloading Monthly Totals

- To download payment history (monthly totals), click on “Payment History” in the menu on the left-hand side of the screen and when the page loads, you will see your payments with the most recent on top.
- To download your summary, click on the red “Export to Excel” button on the top right and save or print it from the Excel spreadsheet. This will only give you the summary information, not the detailed commission statement.

Misc. 1099 Tax Information

- Misc. Tax Forms are issued by OnlineFileTaxes.com and not in house, thus changes will take time
- The IRS requires that a Misc.1099 be issued only if you are paid over \$600.00
- The IRS also only requires that Misc.1099 be issued to Individuals and does not require them for Corporations.
- If you register as a corporation in Tipalti, you will need to download the payment history to see the total amount paid by year and you can utilize this report to process/file your taxes.
- You will only receive a Misc. 1099 from Dickerson for the commission that we that we paid you directly. Any commission issue from carriers directly, including Oscar, will not be included in your 1099 from Dickerson.

Help/Support



Call or email Nydia Cruz

- 323-805-2912
- commissions@dickerson-group.com



Call Tipalti

Technical Support Only

- 650-319-8999