

Agent Portal Onboarding Quick Start Guide

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I. Introduction

Our mission is to build a health care solution that would be good enough for our own family and loved ones. We are devoted to the health and wellness of our members by helping them navigate the healthcare system with service guides, utilizing world-class technology to enable a simplified experience, and partnering with top providers for better health outcomes. Learn more about the Devoted Health Difference.

Important Things to Know

- You must hold an active health insurance license, be contracted, get certified, and be appointed before you can market Devoted benefits.
- If you have completed the Core Medicare training, we accept AHIP, Pinpoint or NAHU certificates. If not, you can now complete the AHIP training by using the [link](#) in our onboarding workflow and get a \$50 discount at checkout.
- The Devoted Health Agent Certification & Exam informs you on how to compliantly market Devoted Health benefits and satisfy the annual CMS Medicare Compliance Program requirements.
- To receive renewals for business sold in prior years, you must be licensed and appointed to sell Medicare products per state laws and recertified annually.
- Completing the PY2023 Certification will also allow you to market PY2023 benefits in our current service areas (*Arizona, Florida, Illinois, Ohio, and Texas only*).
- A face-to-face certification is not required.

Our PY2023 Onboarding & Certification available in our Agent Portal. Our goal is to keep our onboarding experience easy and allow agents to complete the process in a few simple steps.

Onboarding and certification steps:

- Account creation for our Agent Portal
- W-9 & Direct Deposit (*Direct Payees only*)

- Preferred Markets (selections here will determine your state appointment(s))
- Selling Needs
- Code of Conduct
- Agent Agreement
- Background Check
- Medicare Core Training or equivalency upload (AHIP, Pinpoint or NAHU)
 - CMS Fraud, Waste & Abuse & Compliance Training
- Devoted PY2023 Certification Training & Assessment
 - Agents have 3 attempts to pass the training exam with a minimum score of 85%
(If unable to pass within 3 attempts, agent will need to certify for PY2023)
 - Each time the exam is opened (initiated) it will count as an attempt, therefore, it must be completed in one sitting (~40 min).
- License Check
- Appointment

If these steps can't be completed all at once, your progress will be saved and you can continue from the dashboard at a later time, except when doing the Devoted assessment.

Agents cannot market or sell Devoted Health benefits until they receive this email.

**PY2023 certification only available for AZ, FL, IL, OH, TX existing service areas.*

II. Getting Started

Account Creation

- Click on the link sent to you by your agency and start the account creation process. If you have any questions on how to obtain the link please contact your agency directly.
- To ensure you are affiliated with your agency correctly you will need to confirm the agency and affiliation payee type as seen in the image below. *Please note all affiliations will need to follow the release and transfer policy outlined in our broker manual.*



Need help? Call 1-877-764-9446 or [Email us](#)

Welcome to our Agent Portal

- ✓ Submit applications online
- ✓ Track your clients' status
- ✓ See your commissions
- ✓ and more!

SALES AGENCY

Devoted - Independent Agents
Direct Payee



Create Account

Confirm Affiliation

Please confirm the following information is accurate. If it is incorrect, please contact your agency administrator before registering.

**Direct Payee for
Devoted - Independent Agents**

I acknowledge that the information is correct and that I have read and reviewed [Devoted Health's Release and Transfer Policy](#)

Next

- You will be prompted to enter your **Name, NPN, date of birth, email address, and zip code.**
 - This will create an account if you do not already have an Agent Portal account setup.



Need help? Call 1-877-764-9446 or [Email us](#)

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SALES AGENCY

Devoted - Independent Agents
Direct Payee



Create Account

Thank you for partnering with Devoted Health

* Agency:

Devoted - Independent Agents - Direct Payee

* First Name:

* Last Name:

* National Producer Number:

Don't know your NPN?
You can look it up at [NIPR](#).

* Birth Date:

YYYY-MM-DD

* Email:

* Zip:

XXXXX

Submit

Welcome to our Agent Portal

- ✓ **Submit applications online**
- ✓ **Track your clients' status**
- ✓ **See your commissions**
- ✓ **and more!**

SALES AGENCY



Create Account

Thank you for partnering with Devoted Health

You will receive a Welcome email that contains a link for setting up your account. If you don't receive it, just reach out to us at agent-support@devoted.com or 1-877-764-9446.


- If your information is already linked to an account, then you will be prompted to [log in](#) to your account using your credentials, or contact Agent Support for assistance at 1-877-764-9446.

Account Setup

- When your account is created you will receive an email to verify your email address and set a password for your Agent Portal account. Please click the **Create Password** button as seen below:

Devoted Agent Portal Log-in Details >



 **agent-support@devoted.com**
to me ▾

Mon, Nov 2, 2020, 3:32 PM ☆ ↶ ⋮



We're so excited to share what we've been working on with you!

Let's get you logged in!

It's easy to login. Your username is your NPN. And your password? Just tap the button to create one.

[Create Password](#)

Here's a [Quick Start Guide](#) to help you get started!

Any questions? We can help.

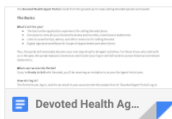
agent-support@devoted.com

1-877-764-9446

TTY 711

Monday to Friday, 9am to 6pm Eastern

Devoted Health is an HMO plan with a Medicare contract. Enrollment in Devoted Health depends on contract renewal. Devoted Health is an HMO plan with a Medicare contract. Enrollment in Devoted Health depends on contract renewal. Our service areas are the following counties in Florida: Broward, Hillsborough, Miami-Dade, Osceola, Palm Beach, Pinellas, Polk and Seminole Counties and the following counties in Texas: Montgomery, Waller, Harris and Fort Bend. Devoted Health complies with applicable Federal civil rights laws and does not discriminate on the basis of race, color, national origin, age, disability, or sex. ATENCIÓN: Si habla español, tiene a su disposición servicios gratuitos de asistencia lingüística. Llame al 1-800-338-6833 (TTY 711).



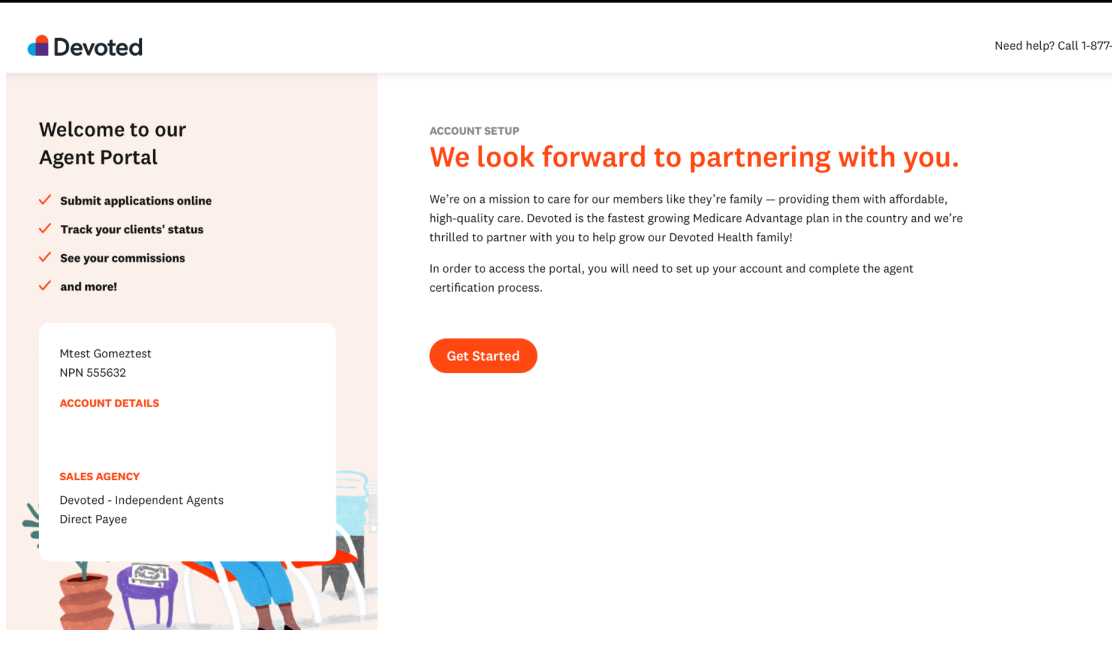
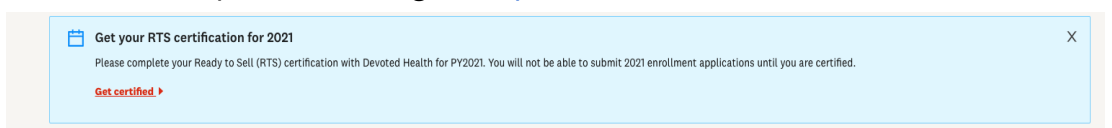
↶ Reply

➦ Forward

- You will be prompted to set your password. Once this is complete, you can log in to your Agent Portal account.

Start the process

You will be able to start our onboarding process by following the easy steps outlined in the images below:

<p>1) Welcome Screen</p>	
<p>1b) Existing Agent Portal Users</p>	<ul style="list-style-type: none"> ● If you are an existing agent, you will log into your Agent Portal account and click on the banner to start your PY2023 Onboarding and certification process ● This will open up a new window as seen below and you should be able to start the process starting on step 5 

2) Contact Info & Preferred Language

- Please enter a **mailing address** and **mobile phone number**
- We recommend that you **opt in to SMS** by checking the box. This will allow you to receive text notifications for enrollment applications, trainings, events, etc.
- The next page will ask you to please select your language preference.




Welcome to our Agent Portal

- ✓ Submit applications online
- ✓ Track your clients' status
- ✓ See your commissions
- ✓ and more!

Mtest Gomeztest
NPN 555632

ACCOUNT DETAILS

SALES AGENCY
Devoted - Independent Agents
Direct Payee



ACCOUNT SETUP

Your Contact Info

* Mailing Address:

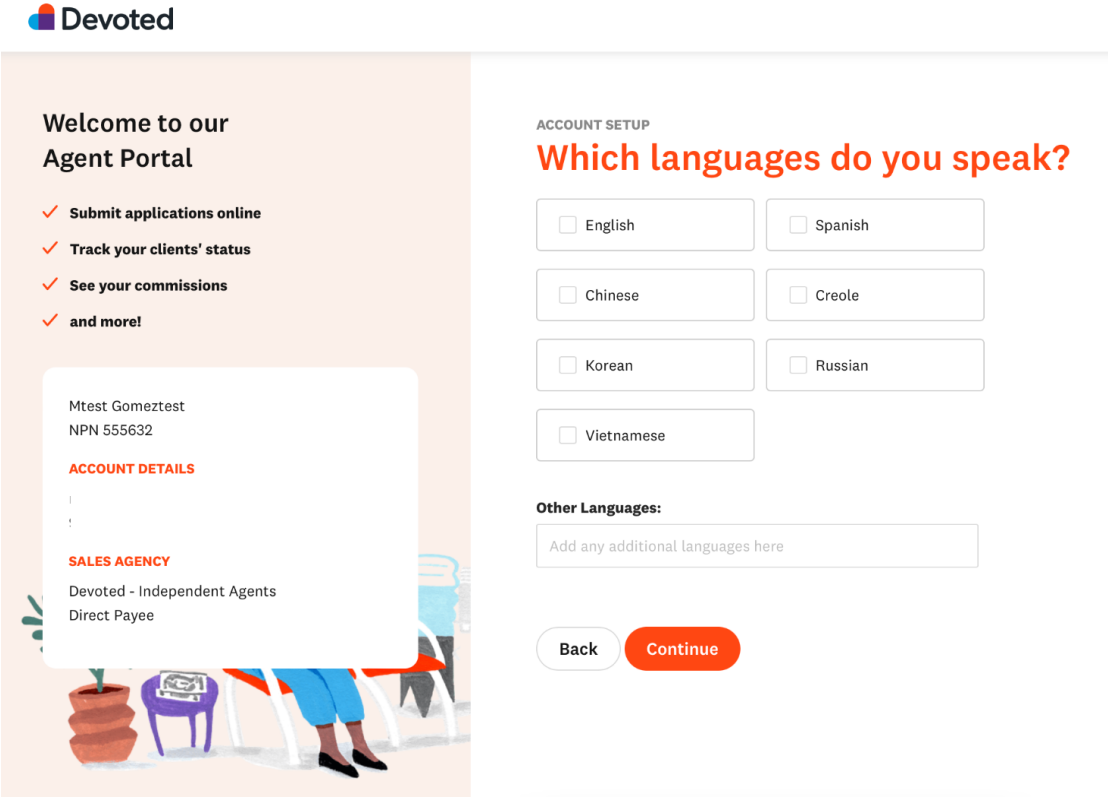
* City: * State: * Zip:

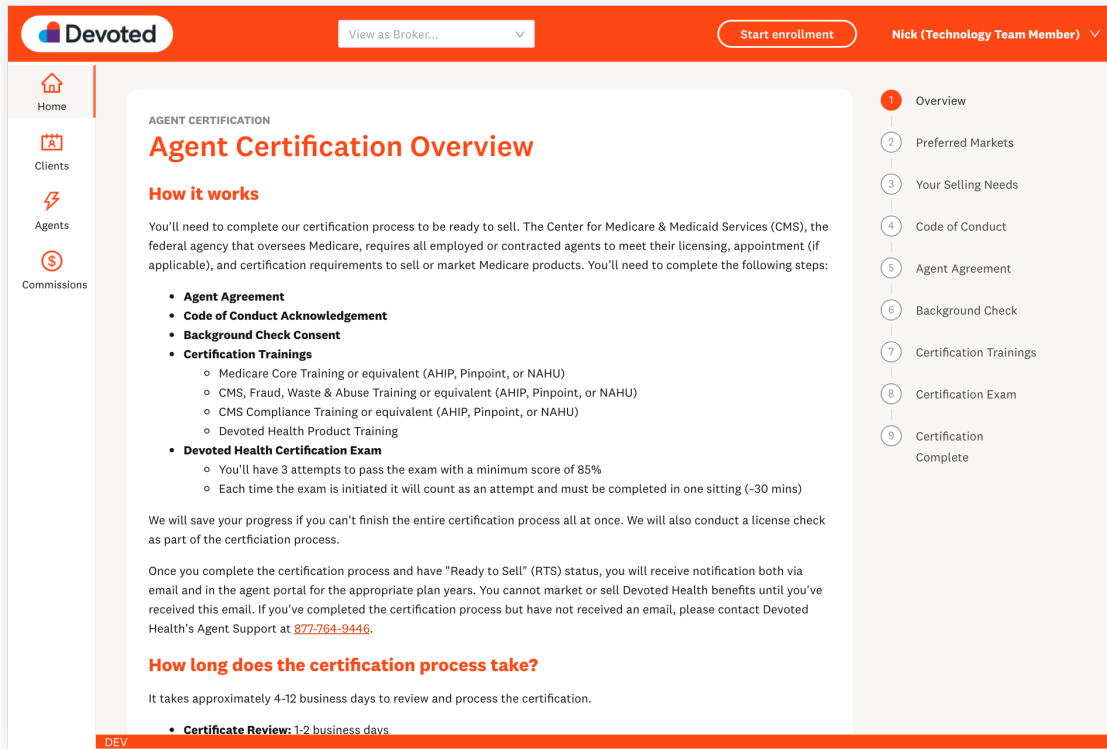
* Mobile Number:

Don't miss important alerts
We share important agent communications via email, SMS, and mail. Please provide your contact information to stay up-to-date on Devoted Health.

I consent to receive messages from Devoted Health. Message and data rates may apply.

Yes No

	
<p>3) Certification Overview - All users</p>	<ul style="list-style-type: none"> ● Overview provides key information related to the certification process and next steps. ● Click the Start Certification button. Your progress will be saved during the process - you can leave and finish later at any time.

	
<p>4) Taxpayer Identification and Attestation (W-9) - (Direct Payee Only)</p>	<ul style="list-style-type: none"> ● Please update this information with the most up to date information. This will be used to process any required documents (e.g. 1099 forms, etc)

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ACCOUNT DETAILS

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Direct Payee

AGENT CERTIFICATION

Taxpayer Identification and Attestation

What type of Taxpayer Identification Number will you use?

Social Security Number (SSN) or Individual Tax Identification

Social Security Number (SSN) or Individual Tax Identification Number (ITIN)

Employer Identification Number (EIN)

Number:

* Federal Tax Classification:

Individual

* Individual Name (as shown on your income tax return):

* Address:

Where we will mail your tax documents

* City:

* State:



Home



Clients



Commissions

Certification

Under penalty of perjury, I certify that:

- The number shown on this form is my correct taxpayer identification number (or I am waiting for a number to be issued to me); and
- I am not subject to backup withholding because: (a) I am exempt from backup withholding, or (b) I have not been notified by the Internal Revenue Service (IRS) that I am subject to backup withholding as a result of a failure to report all interest or dividends, or (c) the IRS has notified me that I am no longer subject to backup withholding; and
- I am a U.S. citizen or other U.S. person (defined in the instructions); and
- FACTA exemption codes are not being collected and do not apply therefore certification for FACTA reporting is not needed.

Certification instructions. You must uncheck item 2 above if you have been notified by the IRS that you are currently subject to backup withholding because you have failed to report all interest and dividends on your tax return. For real estate transactions, item 2 does not apply. For mortgage interest paid, acquisition or abandonment of secured property, cancellation of debt, contributions to an individual retirement arrangement (IRA), and generally, payments other than interest and dividends, you are not required to sign the certification, but you must provide your correct TIN. See the instructions for Certifications (Part II), later.

The Internal Revenue Service does not require your consent to any provision of this section other than the certifications required to avoid backup withholding.

* Signature:

Signature accepted. [Clear Signature](#)

Signed: 12:47 pm

Back

Continue

5) Direct Deposit -
(Direct Payee only)

- You will be able to update this information at any time from the [“My Account”](#) option.

The screenshot displays the Devoted Agent Portal interface. On the left, a sidebar lists features: 'Submit applications online', 'Track your clients' status', 'See your commissions', and 'and more!'. Below this, account details for 'Mtest Gomeztest' (NPN 555632) are shown, including the sales agency 'Devoted - Independent Agents Direct Payee'. The main content area is titled 'Direct Deposit' and prompts the user to provide deposit information. Fields include 'Banking Institution' (Bank), 'Account Type' (Checking, Savings), 'Ownership Type' (Personal account, Business account), 'Routing Number', 'Confirm Routing Number', 'Account Number', and 'Confirm Account Number'. A check stub image is shown with labels for 'ROUTING NUMBER' and 'ACCOUNT NUMBER'. 'Back' and 'Continue' buttons are at the bottom.

6) Preferred Markets

- Select which model of sales applies to you (*field sales, telesales(your agency is approved by DH), or both*)
- Please ensure to make a selection for **each of the states you will like to be appointed in**. If you do not select the applicable state(s) available you will not be appointed for that state(s). You will also be prompted to select your primary selling market. *Please note this will not prevent you from selling/market in other markets in the state.*



Welcome to our Agent Portal

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Mtest Gomeztest
NPN 555632

ACCOUNT DETAILS

SALES AGENCY

Devoted - Independent Agents
Direct Payee

AGENT CERTIFICATION

How and where you plan to sell

The following information helps us manage state appointments, and build better tools and train for our broker partners.

How do you plan to sell? *

- Field
 Telephonically
 Field and telephonically

In which state(s) do you plan to sell? *

- Alabama
- Arizona
- Colorado
- Florida
- Hawaii
- Illinois



Welcome to our Agent Portal

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ACCOUNT DETAILS

SALES AGENCY

Devoted - Independent Agents
Direct Payee

- Hawaii
- Illinois
- North Carolina
- Ohio
- Oregon
- Pennsylvania
- South Carolina
- Tennessee
- Texas

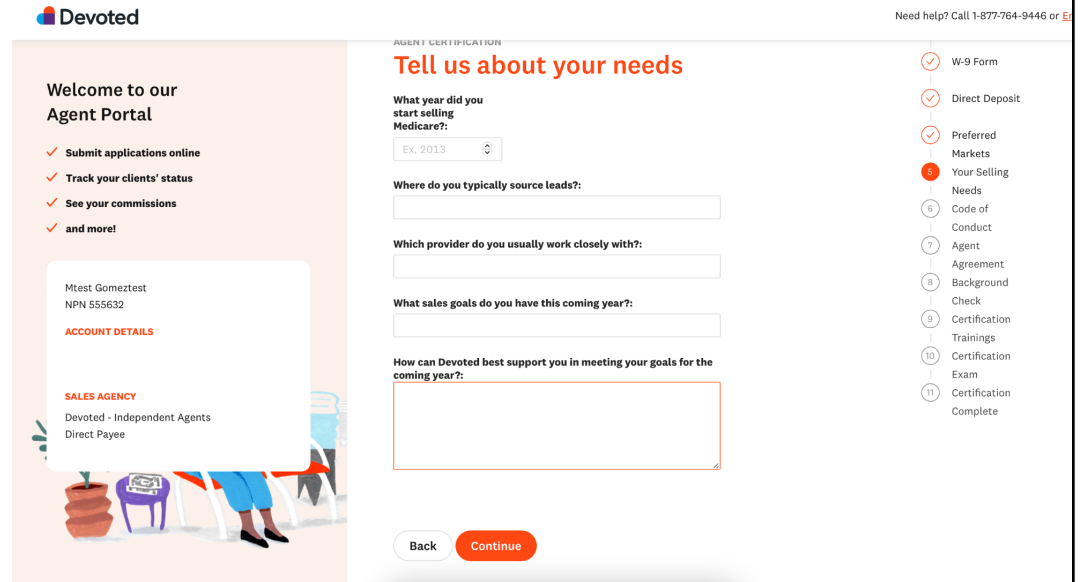
What is your primary market? *

Primary market:

HI - Honolulu

7) Your Selling Needs - All users

- Providing this information will let us know how we can better partner with you.



Devoted Need help? Call 1-877-764-9446 or [E](#)

Welcome to our Agent Portal

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Mtest Gomeztest
NPN 555632

ACCOUNT DETAILS

SALES AGENCY
Devoted - Independent Agents
Direct Payee

AGENT CERTIFICATION

Tell us about your needs

What year did you start selling Medicare?:
Ex. 2013

Where do you typically source leads?:

Which provider do you usually work closely with?:

What sales goals do you have this coming year?:

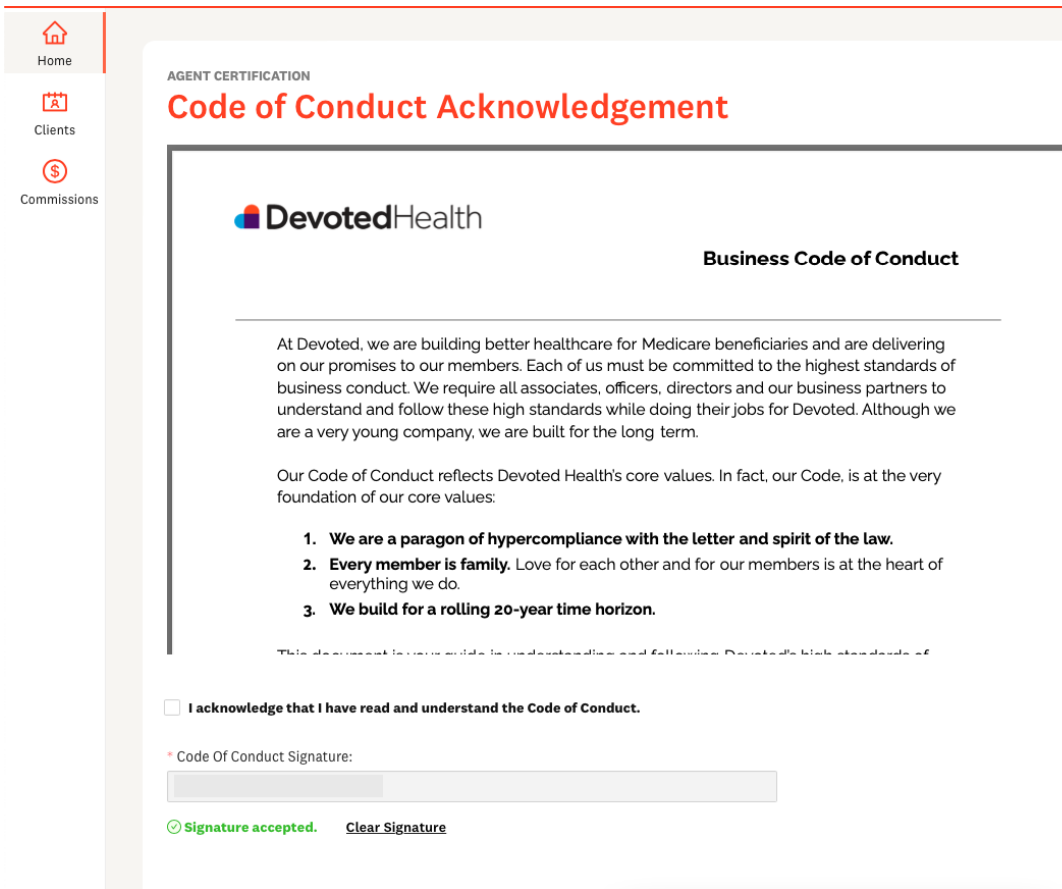
How can Devoted best support you in meeting your goals for the coming year?:

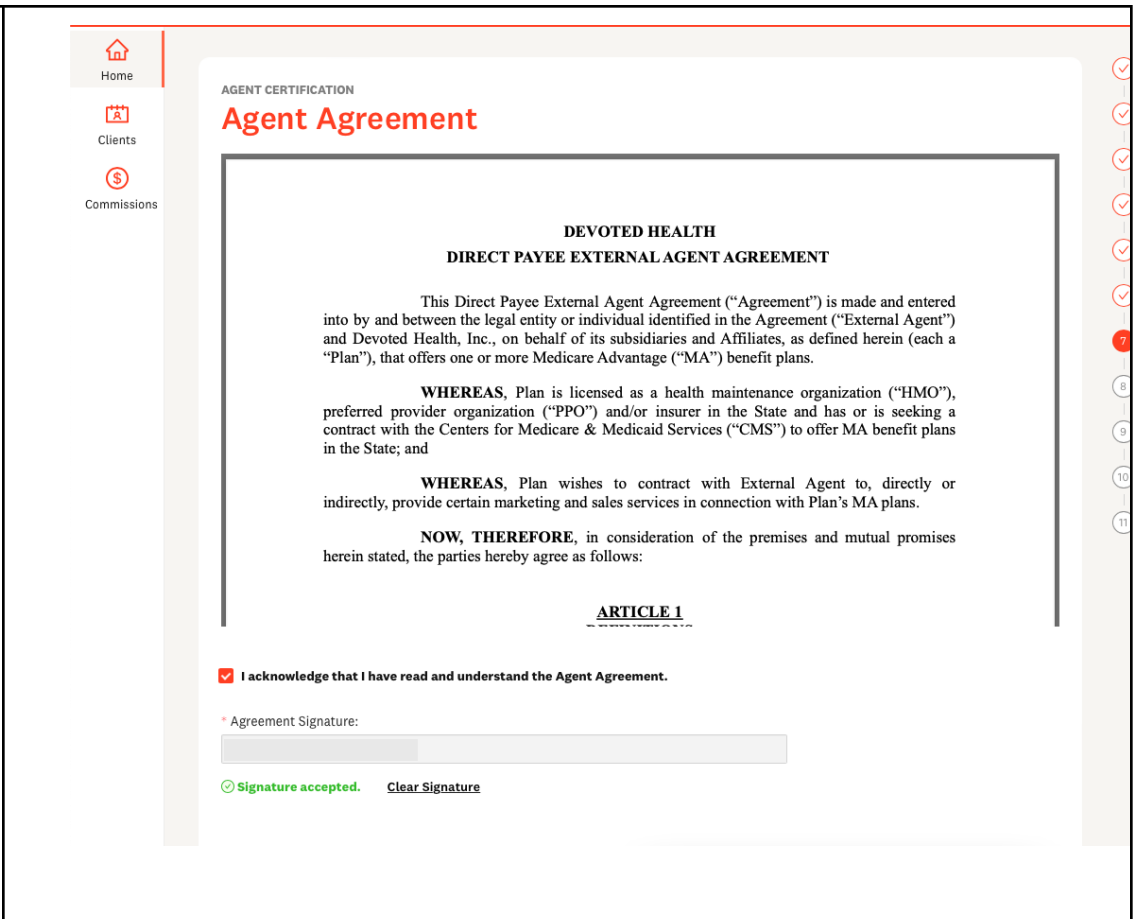
Back Continue


- 1 W-9 Form
- 2 Direct Deposit
- 3 Preferred Markets
- 4 Your Selling Needs
- 5 **Code of Conduct**
- 6 Agent Agreement
- 7 Background Check
- 8 Certification Trainings
- 9 Certification Exam
- 10 Certification Complete


8) Code of Conduct - All users


- The code of conduct will be displayed, you can review or download a copy for your records. Once you have reviewed this information please select the acknowledgement buttons below to ensure you can proceed to the next step.

	
<p>9) Agent Agreement - All users</p>	<ul style="list-style-type: none"> The applicable agent agreement will be displayed, you can review or download a copy for your records. Once you have reviewed this information please select the acknowledgement button to ensure you can proceed to the next step.

	
<p>10) Background Check Consent - All users</p>	<ul style="list-style-type: none"> • The Background check consent will be displayed for your review. • Once you have reviewed this information you must enter your social security number. • Click in the box to sign the form and type in your full name • The date will be preset, please select the continue button

 Home

 Clients

 Commissions

AGENT CERTIFICATION

Background Check Consent

DISCLOSURE REGARDING BACKGROUND INVESTIGATION

Devoted Health Services, Inc. ("the Company") may obtain information about you from a third party consumer reporting agency for employment purposes. Thus, you may be the subject of a "consumer report" which may include information about your character, general reputation, personal characteristics, and/or mode of living. These reports may contain information regarding your criminal history, social security verification, motor vehicle records ("driving records"), verification of your education or employment history, or other background checks.

The investigations will be conducted by **Sterling Infosystems Inc. 4511 Rockside Road, 4th Floor, Independence, OH 44131. 1.866.338.6739**
www.sterlingcheck.com.


DISCLOSURE REGARDING "INVESTIGATIVE CONSUMER REPORT" BACKGROUND INVESTIGATION

Devoted Health Services, Inc. (the "Company") may request an investigative consumer report about you from a third party consumer reporting agency in connection with

I acknowledge that I give my consent for Devoted Health to run a background check.

* Social Security Number:

* Consent Signature:

 **Signature accepted.** [Clear Signature](#)

Signed: 06/15/2022

<p>11) Certification Trainings - <i>All users</i></p>	<ul style="list-style-type: none"> • If you have a completed 2023 AHIP, PinPoint, or NAHU certificate you can upload a copy by selecting the upload certificate button. • You can complete the AHIP certificate by clicking the launch AHIP link - it will open up the AHIP site where you can get a \$50 discount at checkout. <p style="text-align: right; font-size: small;">Need help? Call 1-877-764-</p> <div style="border: 1px solid #ccc; padding: 10px; margin: 10px 0;"> <p style="text-align: center; font-weight: bold; font-size: small;">AGENT CERTIFICATION</p> <h2 style="text-align: center; color: #e67e22;">Certification Trainings</h2> <div style="border: 1px solid #ccc; padding: 5px; margin: 5px 0;"> <p style="text-align: center; font-weight: bold;">PY2023 Core Medicare Training (AHIP, PinPoint, NAHU)</p> <p style="font-size: x-small;">You will need to provide a 2023 CMS Training Certificate; we accept certificates from AHIP, PinPoint, or NAHU. If you have not yet completed your 2023 CMS Training, we offer a \$50 discount through AHIP when using the link below.</p> <p style="font-size: x-small; color: #e67e22;">Launch AHIP and get a \$50 discount</p> <p style="font-size: x-small;">Please upload your 2023 AHIP, Pinpoint or NAHU certificate:</p> <div style="border: 1px solid #ccc; padding: 2px; display: inline-block; margin: 5px 0;"> 📎 Upload Certificate </div> </div> <div style="display: flex; justify-content: center; gap: 10px; margin-top: 10px;"> Back Continue </div> <div style="float: right; font-size: x-small; margin-top: 10px;"> <ul style="list-style-type: none"> ✓ Overview ✓ W-9 Form ✓ Direct Deposit ✓ Preferred Markets ✓ Your Selling Needs ✓ Code of Conduct ✓ Agent Agreement ✓ Background Check <li style="background-color: #e67e22; color: white; border-radius: 50%; width: 15px; height: 15px; display: flex; align-items: center; justify-content: center; margin: 0 auto;">9 ○ Certification Trainings ○ Certification Exam ○ Certification Complete </div> </div>
<p>11) Certification Exam - <i>All users</i></p>	<ul style="list-style-type: none"> • You will access our PY2023 Devoted Health Product Training by clicking the Launch button on the top of the page as seen below. <ul style="list-style-type: none"> ○ This will go through a presentation that will have an interactive experience and guide you through our product offerings, markets, and much more. • Once you have completed the training you will select the Continue to Exam button at the bottom of the page.

Need

AGENT CERTIFICATION

Certification Exam

PY2023 Devoted Health Product Training

Launch

The 2023 Agent Certification & Exam informs you on how to compliantly market Devoted Health benefits and satisfy the annual CMS Medicare Compliance Program requirements.

PY'2023 Devoted Agent Certification Exam

Attempts Remaining: 2

Things to keep in mind

- You have 3 attempts to pass the exam
- Passing score = 85% or higher
- Each time the exam is initiated counts as an attempt
- You should complete the exam in one sitting (~30 mins)

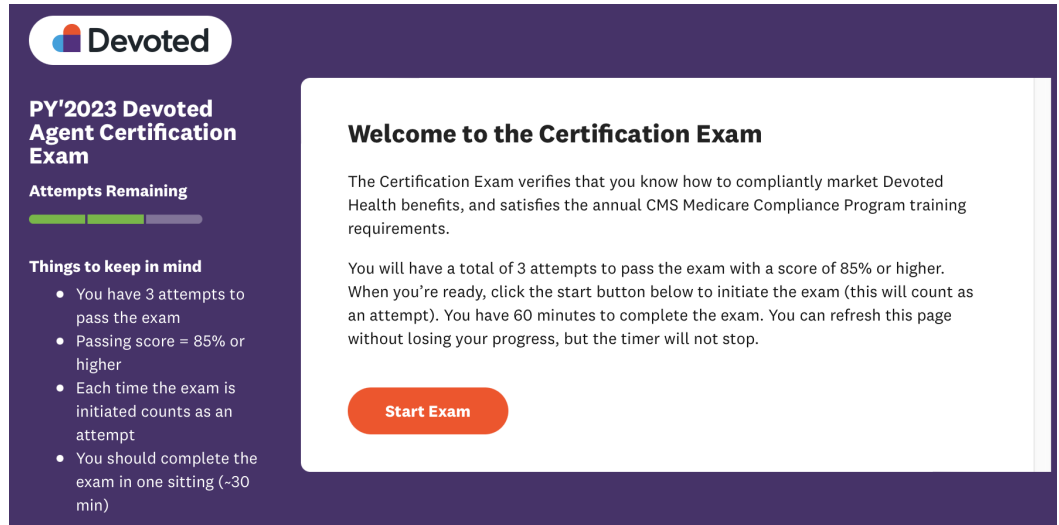
What to expect next

Once you pass the exam, we will process your state appointments. You will receive an email notification when you are Ready to Sell and approved to market and sell Devoted Health benefits.

Back

Continue to Exam

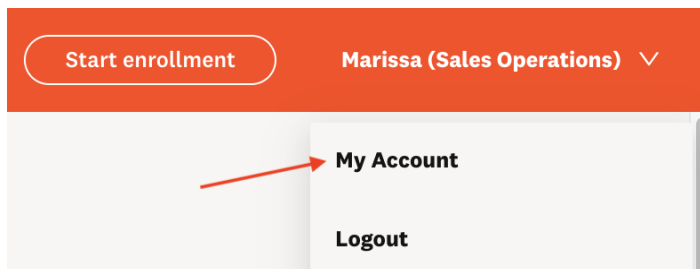
- This will open up this screen where the test will be completed.
 - You will have 3 attempts total and 1 hour per attempt. Once you start an exam you cannot exit and come back as it will count as an attempt.
 - All questions and answers will be randomized in each attempt



Verify and Update your Financial Information (**Direct Payees only**)

You can view and update your financial information in your Agent Portal account by following the easy steps outlined below:

- Login to your [Agent Portal](#) account
 - If you need assistance with your username as password credentials please contact us.
- On the top right hand corner of the page you will see your name, select it and you will see a dropdown menu.
 - Select My Account.



- This will display your demographic and financial information as seen below:

Account Information

FIRST NAME
LAST NAME
BIRTH DATE
EMAIL
PHONE
TEXT MESSAGE CONSENT

Contact Information

STREET ADDRESS
STREET ADDRESS 2
CITY
STATE
ZIP

- If you need to update your financial information
- Click on the Edit button in the W9 or Direct Deposit section to make the necessary changes

W-9 Edit

We are missing important details for you. Please complete this section to avoid disruption to your agent account.

Add W-9 Information

Direct Deposit Edit

We are missing important details for you. Please complete this section to avoid disruption to your agent account.

Add Direct Deposit



agent-support@devoted.com

1-877-764-9446

Questions?

Contact us at 1-877-764-9446 or send us an email at agent-support@devoted.com. Or contact your local [Devoted Sales Leader](#).