

Hello,

Our PY2024 Registration is now available in our Agent Portal! We have top doctors, cutting edge technology, and personalized care teams that help us provide high quality healthcare to our members. Our goal is to keep our onboarding and certification experience easy and allow agents to complete the process in a few simple steps. We are super excited about the upcoming selling season and look forward to working closely with Jack Schroeder and Associates, Inc. and your agents.

PY2024 Onboarding and Certification Process

NOTE: For Medicare enrollments, Devoted will pay producing agents commissions one of two ways:

1. Pay the agency (Indirect Payee)
2. Pay agents directly (Direct Payee)

Our Onboarding and Certification Process

- Account creation for Devoted Health's Agent Portal
- W-9 & Direct Deposit (*Direct Payees only*)
- Agent Questionnaire
- Code of Conduct Acknowledgement
- Agent Agreement
- Background Check Consent
- Core Medicare Training or equivalency upload (AHIP or Pinpoint)
 - CMS Fraud, Waste & Abuse & Compliance Training
- Devoted PY2024 Certification Training & Exam
 - Agents will have 3 attempts to pass the training exam with a minimum score of 85% (*If the agent is unable to pass within 3 attempts, they will need to certify for PY2025*)
 - *Each time the exam is opened (initiated) it will count as an attempt and must be completed in one sitting (~40 min).*
- License Check
- RTS Status**

The agent's progress will be saved if they cannot complete the certification all at once — they will be able to continue at a later time with the exception of the Devoted Health training exam.

What happens once the appointment process is complete?

Once the appointment process for the agent's respective state(s) is complete, they will receive an email notification that they're "Ready to Sell" (RTS) for PY2024*. Agents cannot market or sell Devoted Health benefits until they receive this email.

How To Get Started Today

For agents who are interested in contracting with Devoted Health please follow these important steps:

1. Determine if your agent is correctly identified as an **INDIRECT** Payee or **DIRECT** Payee.
 2. Copy and paste the template below into a NEW email and add the appropriate link to send it to your downline agent. **DO NOT share this entire email with agents in your downline.**
 3. Monitor your agents onboarding/certification status in our [Agent Portal](#).
- Direct Payee Link - <https://agent.devoted.com/register?a=3f253bda-db46-49b2-aeb1-490c93d6a0ab&t=4&n=Jack%20Schroeder%20and%20Associates,%20Inc.>
 - Indirect Payee Link - <https://agent.devoted.com/register?a=3f253bda-db46-49b2-aeb1-490c93d6a0ab&t=5&n=Jack%20Schroeder%20and%20Associates,%20Inc.>

Customize the email below into a **NEW EMAIL** and send it to your downline agent.

Email Template

Hello!

Thank you for your interest in contracting with Devoted Health Plans. We have top doctors, cutting edge technology, and personalized care teams that help us provide high quality healthcare to our members. We're on a mission to make healthcare better — [learn more](#) about the Devoted Health Difference! We are excited to partner with you and look forward to working together.

Your Commission Type:

INDIRECT PAYEE

This means your enrollment commission will be paid to your Agency and they are responsible for compensating you for your Devoted Health Medicare enrollments. You must receive a Ready To Sell* email before you can market Devoted Health in any market.

DIRECT PAYEE

This means your enrollment commission will be paid directly to you by Devoted Health. You must receive a Ready To Sell* email before you can market Devoted Health in any market.

How to get started in Agent Portal

1. Create an Account using **[INSERT LINK]**

(Existing Agents: log into your existing account)
2. Complete Onboarding
3. Start the Certification Process

Important Things To Know

- If you have completed the Core Medicare training, we accept AHIP, PinPoint and NABIP (formerly NAHU) certificates. If not, you can now complete the **AHIP training** and get a \$50 discount. The link will also be available in our certification workflow.
- The Devoted Health Product Training & 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 PY2024 Certification will also allow you to market PY2023 benefits in our current service areas.
- A face-to-face certification is not required.
- For more guidance, please refer to the **[Devoted Agent Portal Quick Start Guide](#)** or visit us at **www.devoted.com/brokers**.

Questions?

Contact us at 1-877-764-9446 or you can also contact your local **[Devoted Health Sales Leader](#)**.

