

# 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 NABIP (formerly 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 PY2024 Certification will also allow you to market PY2023 benefits in our current service areas.
- A face-to-face certification is not required.

**Our PY2024 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 NABIP (formerly NAHU))
  - CMS Fraud, Waste & Abuse & Compliance Training
- Devoted PY2024 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 PY2025)*
  - 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.

**Agents cannot market or sell Devoted Health benefits until they receive the “ready to sell”(RTS) email.**

*\*PY2023 certification only available for existing Devoted Health 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.*

## 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.

## Welcome to our Agent Portal

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- ✓ and more!

### 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

- ✓ Register to sell Devoted Health
- ✓ Submit applications online
- ✓ Track your clients' status
- ✓ See your commissions

### SALES AGENCY

Devoted Health - Independent Agent  
Direct Payee



## Thanks! Check your email

You should get a welcome email that will prompt you to finish setting up your account. Don't see one? Email [agent-support@devoted.com](mailto:agent-support@devoted.com) or call 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:



Welcome to the Devoted Health Agent Portal — where you can sell Devoted easier and faster by submitting applications online, track your clients' status, and see your commissions.

### How to Log In

We've already provided you with a username — you'll just need to create a password to access your account.

Username:

Create Password

Use this [Quick Start Guide](#) to help you get started.

### Need help?

[agent-support@devoted.com](mailto:agent-support@devoted.com)

[1-877-764-9446](tel:1-877-764-9446)

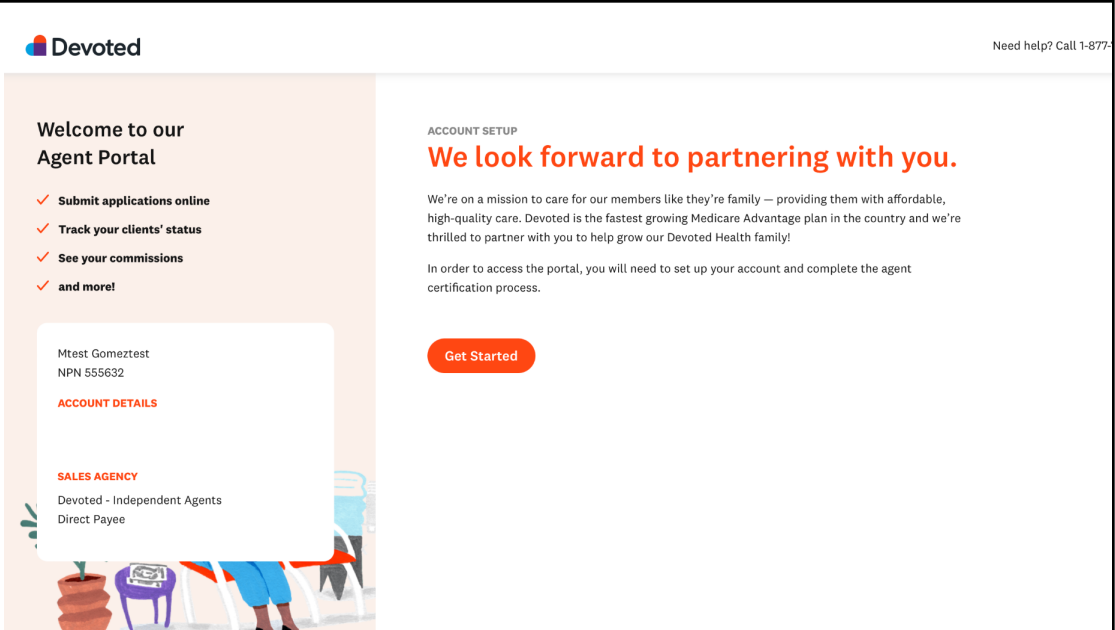
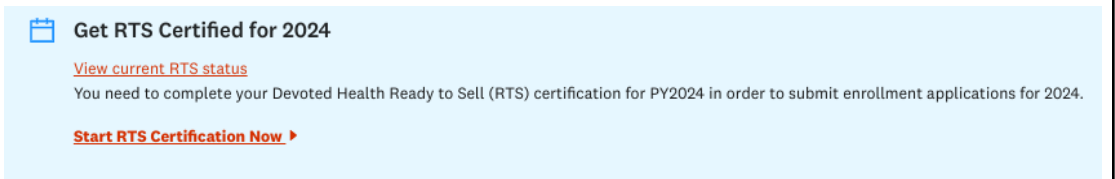
Weekdays, 9am to 10pm Eastern (Dec 8 - Oct 14)

Devoted Health is an HMO and PPO plan with a Medicare contract. Our D-SNPs also have contracts with State Medicaid programs. Enrollment in our plans 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).

- 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"> <li>• If you are an existing agent, you will log into your Agent Portal account and click on the banner to start your PY2024 Onboarding and certification process</li> <li>• This will open up a new window as seen below and you should be able to start the process starting on <a href="#">step 5</a></li> </ul> 

## 2) Contact Info & Preferred Language

- Please enter **full 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.
- Select continue when finished

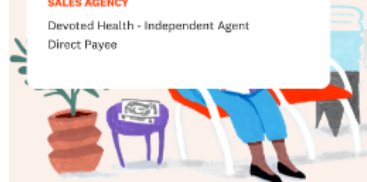
Welcome to our Agent Portal

- ✓ Register to sell Devoted Health
- ✓ Submit applications online
- ✓ Track your clients' status
- ✓ See your commissions

Travis Hutchins TEST ACCOUNT  
NPN 12312312345

**ACCOUNT DETAILS**

**SALES AGENCY**  
Devoted Health - Independent Agent  
Direct Payee



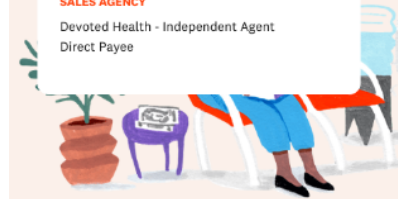
Welcome to our Agent Portal

- ✓ Register to sell Devoted Health
- ✓ Submit applications online
- ✓ Track your clients' status
- ✓ See your commissions

Travis Hutchins TEST ACCOUNT  
NPN 12312312345

**ACCOUNT DETAILS**

**SALES AGENCY**  
Devoted Health - Independent Agent  
Direct Payee



### ACCOUNT SETUP

## Finish setting up your Devoted Health account

We share important information via email, SMS, and mail. Let us know how to reach you.

\* Mailing Address:

Mailing Address is required.

\* City:

City is required.

\* State:

\* Zip:

Zip code is required.

\* Cell Number:

Cell number is required.

Yes, I want to get messages from Devoted Health. Message and data rates may apply.

☐ Yes

☐ No

Back

Continue

### ACCOUNT SETUP

## Which languages do you speak?

☐ English

☐ Spanish

☐ Chinese

☐ Creole

☐ Korean

☐ Russian

☐ Vietnamese

☐ French

☐ German

☐ Laotian

Other Languages:

Add any additional languages here

Back

Continue



### 3) Certification Overview PY'24 - All users

- Overview provides key information related to the certification process and next steps.

Welcome to our Agent Portal

- ✓ Register to sell Devoted Health
- ✓ Submit applications online
- ✓ Track your clients' status
- ✓ See your commissions

Tom Test Collins  
NPN 10152023

**SALES AGENCY**  
Devoted EPA  
Indirect Payee



AGENT CERTIFICATION

## Agent Certification Overview for 2024

### How it works

You'll need to complete our certification process to be ready to sell. The Center for Medicare & Medicaid Services (CMS), the federal agency that oversees Medicare, requires all employed or contracted agents to meet their licensing, appointment (if applicable), and certification requirements to sell or market Medicare products. You'll need to complete the following steps:

- **Agent Agreement**
- **Code of Conduct Acknowledgement**
- **Background Check Consent**
- **Certification Trainings**
  - Medicare Core Training or equivalent (AHIP, Pinpoint, or NABIP (formerly NAHU))
  - CMS, Fraud, Waste & Abuse Training or equivalent (AHIP, Pinpoint, or NABIP (formerly NAHU))
  - CMS Compliance Training or equivalent (AHIP, Pinpoint, or NABIP (formerly NAHU))
  - Devoted Health Product Training
- **Devoted Health Certification Exam**
  - You'll have 3 attempts to pass the exam with a minimum score of 85%
  - Each time the exam is initiated it will count as an attempt and must be completed in one sitting (~30 mins)

We will save your progress if you can't finish the entire certification process all at once. We will also conduct a license check as part of the certification process.

Once you complete the certification process and have "Ready to Sell" (RTS) status, you will receive notification both via email and in the agent portal for the appropriate plan years. You cannot market or sell Devoted Health benefits until you've received this email. If you've completed the certification process but have not received an email, please contact Devoted Health's Agent Support at [877-764-9446](tel:877-764-9446).

### How long does the certification process take?

It takes approximately 4-12 business days to review and process the certification.

- 1 Overview
- 2 Preferred Markets
- 3 Your Selling Needs
- 4 Code of Conduct
- 5 Agent Agreement
- 6 Background Check
- 7 Certification Trainings
- 8 Product Training
- 9 Certification Exam
- 10 Certification Complete

4) Taxpayer Identification and Attestation (W-9) - *(Direct Payee Only)*

- 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)

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

AGENT CERTIFICATION

**Taxpayer Identification and Attestation**

What type of Taxpayer Identification Number will you use?

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

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](#)

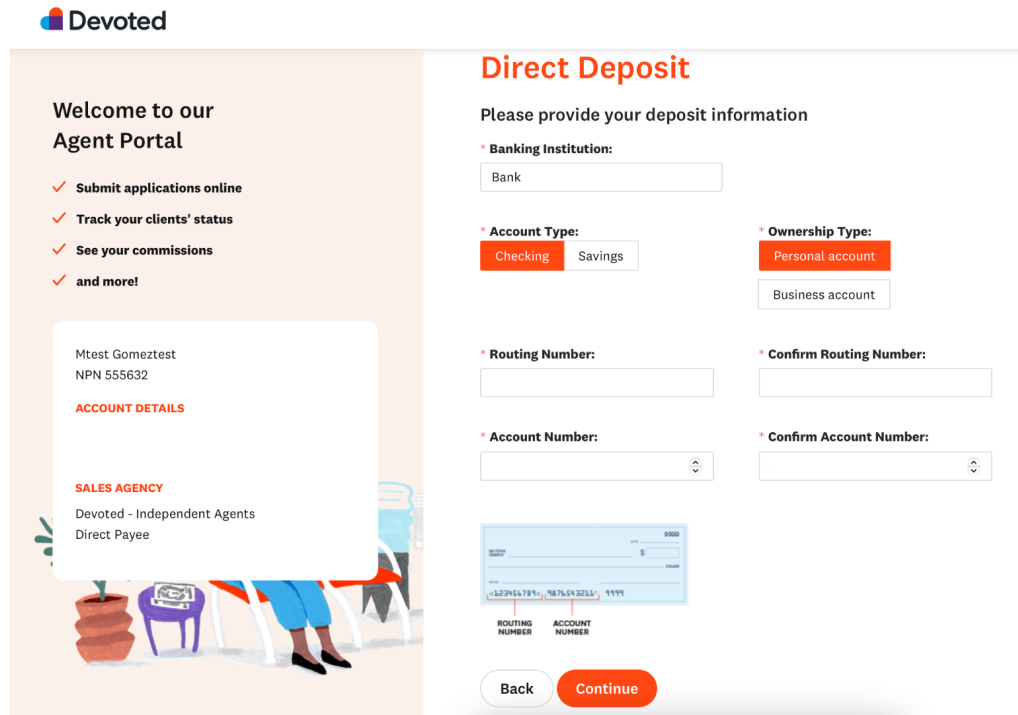
Signed: 12:47 pm

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 shows the Devoted Agent Portal interface for setting up direct deposit. On the left, a sidebar titled 'Welcome to our Agent Portal' lists features: 'Submit applications online', 'Track your clients' status', 'See your commissions', and 'and more!'. Below this, a box displays 'Mtest Gomeztest' and 'NPN 555632'. The main content area is titled 'Direct Deposit' and asks the user to 'Please provide your deposit information'. It includes fields for 'Banking Institution' (with a dropdown menu), 'Account Type' (with 'Checking' and 'Savings' options), 'Ownership Type' (with 'Personal account' and 'Business account' options), 'Routing Number', 'Confirm Routing Number', 'Account Number', and 'Confirm Account Number'. At the bottom, there is a 'Back' button and a 'Continue' button. An illustration of a person sitting at a desk is visible in the background of the sidebar.

## 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. The primary market counties will also be visible during your selection. *Please note this will not prevent you from selling/market in other markets in the state.*

## Welcome to our Agent Portal

- ✓ Register to sell Devoted Health
- ✓ Submit applications online
- ✓ Track your clients' status
- ✓ See your commissions

Tom Test Collins  
NPN 10152023

### ACCOUNT DETAILS

### SALES AGENCY

Devoted EPA  
Indirect Payee



## Welcome to our Agent Portal

- ✓ Register to sell Devoted Health
- ✓ Submit applications online
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Tom Test Collins  
NPN 10152023

### ACCOUNT DETAILS

### SALES AGENCY

Devoted EPA  
Indirect Payee



### AGENT CERTIFICATION

## How and where you plan to sell in 2024

The following information helps us manage state appointments, and build better tools and trainings 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

☐ Oregon

☐ Pennsylvania

### FL - Northwest Florida

FL - Daytona

FL - East Coast

FL - Broward / Palm Beach

FL - Polk

FL - North Florida

FL - Greater Tampa Bay

FL - Greater Orlando

FL - Northwest Florida

The Northwest Florida market contains the following counties:

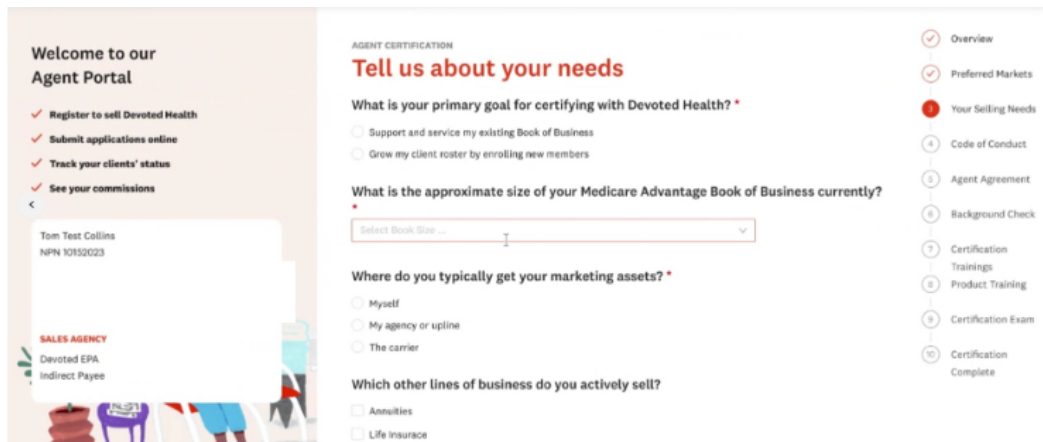
- ESCAMBIA
- SANTA ROSA

Back

Continue

## 7) Your Selling Needs - All users

- Providing this information will let us know how we can better partner with you. We deeply value your feedback so please answer all of the questions.



**Welcome to our Agent Portal**

- ✓ Register to sell Devoted Health
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- ✓ Track your clients' status
- ✓ See your commissions

Tom Test Collins  
NPN 10152023

**SALES AGENCY**  
Devoted EPA  
Indirect Payee

**AGENT CERTIFICATION**  
**Tell us about your needs**

What is your primary goal for certifying with Devoted Health? \*

☐ Support and service my existing Book of Business

☐ Grow my client roster by enrolling new members

What is the approximate size of your Medicare Advantage Book of Business currently? \*

Select Book Size ...

Where do you typically get your marketing assets? \*

☐ Myself

☐ My agency or upline

☐ The carrier

Which other lines of business do you actively sell?

☐ Annuities

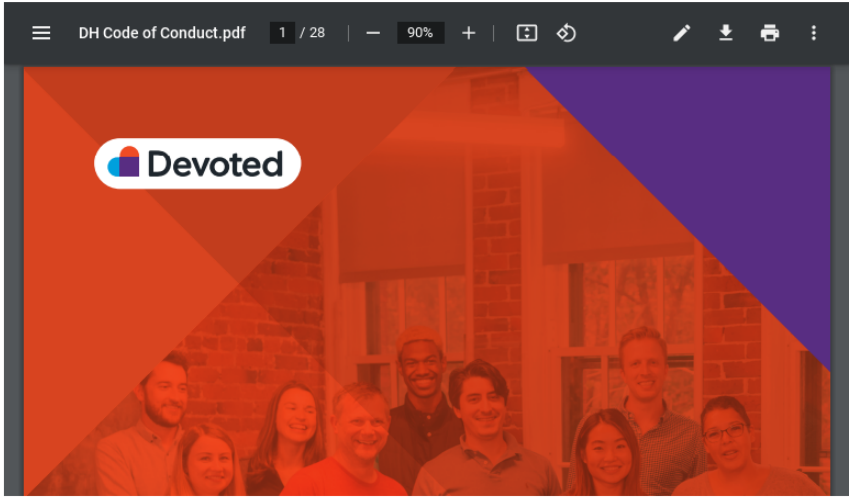
☐ Life Insurance

Progress Indicator:

- ✓ Overview
- ✓ Preferred Markets
- 1 Your Selling Needs**
- 4 Code of Conduct
- 5 Agent Agreement
- 6 Background Check
- 7 Certification Trainings
- 8 Product Training
- 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>AGENT CERTIFICATION</p> <h3>Code of Conduct Acknowledgement</h3>  <p>Having trouble viewing this document? Click <a href="#">here</a> to open in a new window.</p> <p><input checked="" type="checkbox"/> I acknowledge that I have read and understand the Code of Conduct.</p> <p>* Code Of Conduct Signature:</p> <p>Tom Test Collins</p> <p>✔ Signature accepted. <a href="#">Clear Signature</a></p>
<p>9) Agent Agreement - All users</p>	<ul style="list-style-type: none"> <li>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.</li> </ul>

AGENT CERTIFICATION

## Agent Agreement

☰ DH\_IndirectPayeeExte... 1 / 40 | - 90% + | 📄 🔍 ✎ ⬇️ 🖨️ ⋮

### DEVOTED HEALTH INDIRECT PAYEE EXTERNAL AGENT AGREEMENT

This Indirect Payee External Agent Agreement ("Agreement") is made and entered into by and between the legal entity or individual identified in the Agreement ("External Agent"), and Devoted Health, Inc., on behalf of its subsidiaries and Affiliates, as defined herein (each a "Plan"), that offers one or more Medicare Advantage ("MA") benefit plans.

**WHEREAS**, Plan is licensed as a health maintenance organization ("HMO"), preferred provider organization ("PPO") and/or insurer in the State and has or is seeking a contract with the Centers for Medicare & Medicaid Services ("CMS") to offer MA benefit plans in the State; and

**WHEREAS**, Plan wishes to contract with External Agent to provide marketing and sales services in connection with Plan's MA plans directly and indirectly through External Agents (as hereinafter defined).

**NOW, THEREFORE**, in consideration of the premises and mutual promises

Having trouble viewing this document? Click [here](#) to open in a new window.

☒ I acknowledge that I have read and understand the Agent Agreement.

\* Agreement Signature:

Tom Test Collins

✔ Signature accepted. [Clear Signature](#)



## 10) Background Check Consent - All users

- 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

### AGENT CERTIFICATION

## Background Check Consent

Background Check Atte...
1 / 4
90%

Acknowledgement And Authorization For Consumer Reports

**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](http://www.sterlingcheck.com).

Having trouble viewing this document? Click [here](#) to open in a new window.


**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: 6/22/2023

11) Certification Trainings - All users	<ul style="list-style-type: none"> <li>If you have a completed 2024 AHIP, PinPoint, or NABIP (formerly NAHU) certificate you can upload a copy by selecting the upload certificate button.</li> <li>You can complete the AHIP certificate by clicking the <a href="#">launch AHIP link</a> - it will open up the AHIP site where you can get a \$50 discount at checkout.</li> </ul> <p>AGENT CERTIFICATION</p> <h3>Certification Trainings</h3> <div> <p>PY2024 Core Medicare Training (AHIP, PinPoint, NABIP (formerly NAHU))</p> <p>You will need to provide a 2024 CMS Training Certificate; we accept certificates from AHIP, PinPoint, or NABIP (formerly NAHU). If you have not yet completed your 2024 CMS Training, we offer a \$50 discount through AHIP when using the link below.</p> <p><a href="#">Launch AHIP and get a \$50 discount</a></p> <p>Please upload your 2024 AHIP, Pinpoint or NABIP (formerly NAHU) certificate:</p> <p> Screenshot 2023-06-22 12.10.24 PM.png</p> <p> <input type="button" value="Back"/> <input type="button" value="Continue"/> </p> </div>
12) Certification Exam - All users	<ul style="list-style-type: none"> <li>You will access our PY2024 Devoted Health Product Training by clicking the <b>Launch Product Training</b> button in the center of the page as seen below. <ul style="list-style-type: none"> <li>This will go through a presentation that will have an interactive experience and guide you through our product offerings, markets, and much more.</li> <li><i>Please note if you have to leave the training for any reason your progress will now be saved.</i></li> </ul> </li> <li>Once you have completed the training you will select the Continue to Exam Instructions button at the bottom of the page. Then select Continue to Exam.</li> </ul>



Need help?

### Welcome to our Agent Portal

- ✓ Register to sell Devoted Health
- ✓ Submit applications online
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- ✓ See your commissions

Tom Test Collins  
NPN 10152023

**ACCOUNT DETAILS**

mallorymmahoney+10152023@gmail.com  
1234567899

**SALES AGENCY**

Devoted EPA  
Indirect Payee

AGENT CERTIFICATION

## Product Training

PY2024 Devoted Health Product Training

The 2024 Agent Certification & Product Training informs you on how to compliantly market Devoted Health benefits and satisfy the annual CMS Medicare Compliance Program requirements.

[Launch Product Training](#)

[Back](#) [Continue to Exam Instructions](#)



Need help?

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Tom Test Collins  
NPN 10152023

**SALES AGENCY**

Devoted EPA  
Indirect Payee

AGENT CERTIFICATION

## Certification Exam

PY2024 Devoted Agent Certification Exam

**Attempts Remaining: 3**

**Things to keep in mind**

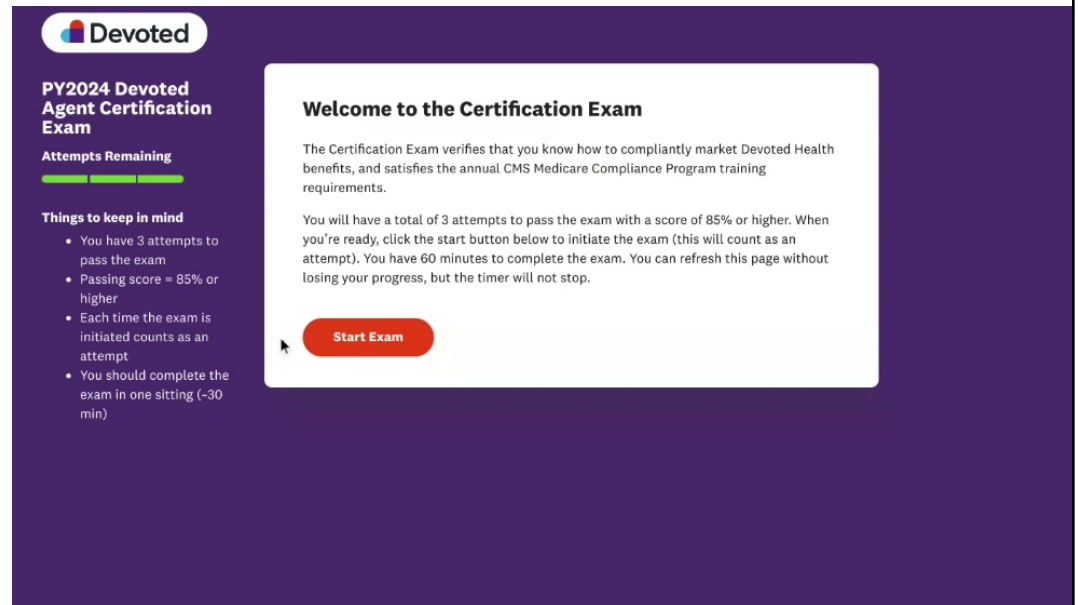
- You have 3 attempts to pass the exam
- Passing score = 85% or higher
- Each time the exam is initiated counts as an attempt
- You should complete the exam in one sitting (~30 mins)

**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](#)

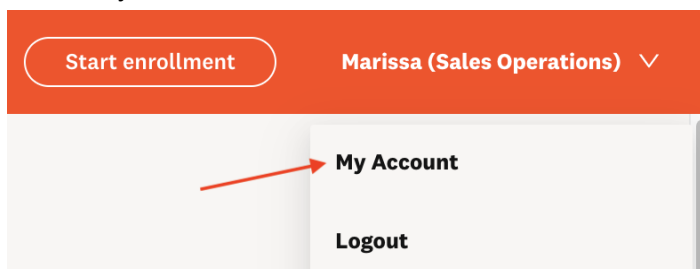
- This will open up this screen where the test will be completed.
  - You will have 3 attempts total and 1 hour per attempt. Once you start an exam you cannot exit and come back as it will count as an attempt.
  - All questions and answers will be randomized in each attempt



### 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](mailto: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](mailto:agent-support@devoted.com). Or contact your local [Devoted Sales Leader](#).