

# Certification and 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 PY2027 Certification will also allow you to market PY2026 benefits in our current service areas.
- A face-to-face certification is not required.

**Our PY2027 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 PY2027 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 recertify for PY2027)
  - 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.**

*\*PY2026 certification is 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.

#### Grow your business with Devoted Health Medicare Advantage plans

Good news: Devoted is growing again this year! Get certified to sell Devoted Health Medicare Advantage plans and enjoy seamless support every step of the way.

Register today



- 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.*

The screenshot shows a two-column layout. The left column, titled 'Welcome to our Agent Portal', lists four benefits: 'Register to sell Devoted Health', 'Submit applications online', 'Track your clients' status', and 'See your commissions'. Below these is a box labeled 'SALES AGENCY' containing 'One Person Agency (Parent)' and 'Indirect Payee'. The right column, titled 'Register to sell Devoted Health plans', states 'Our process is quick. You just need to create an account and complete a few steps.' It then says 'FIRST, CONFIRM YOUR AFFILIATION' and 'If the wrong information is listed, contact your agency administrator.' A red-bordered box contains the text 'Indirect Payee for One Person Agency (Parent)'. Below this is a checkbox with a checkmark and the text 'I acknowledge that the information is correct and that I have read and reviewed [Devoted Health's Release and Transfer Policy](#)'. At the bottom of the right column is a red 'Next' button.

- 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.
- 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.

The screenshot shows a registration form titled 'Tell us who you are'. It contains several input fields: 'Agency:' with a dropdown menu showing 'Four People Agency (Sub) - Direct Payee'; 'First Name:'; 'Last Name:'; 'National Producer Number:'. Below these is a link: 'Don't know your NPN? You can look it up at [NIPR](#)'. Then 'Birth Date:' with a date picker showing 'YYYY-MM-DD'; 'Email:'; and 'Zip:' with a field showing 'XXXXX'. At the bottom is a red 'Submit' button.

## Thanks! Check your email

You should get a welcome email that will prompt you to finish setting up your account. Don't see one? Call [1-877-764-9446](tel: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?

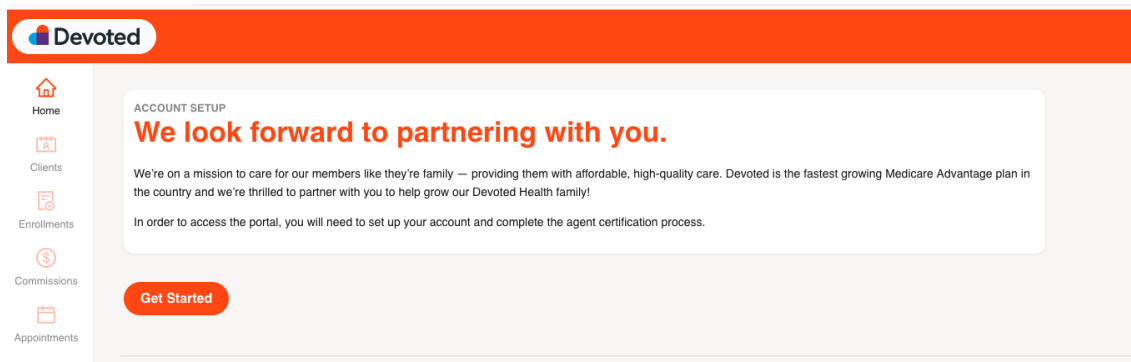
[agent-support@devoted.com](mailto:agent-support@devoted.com)

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

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

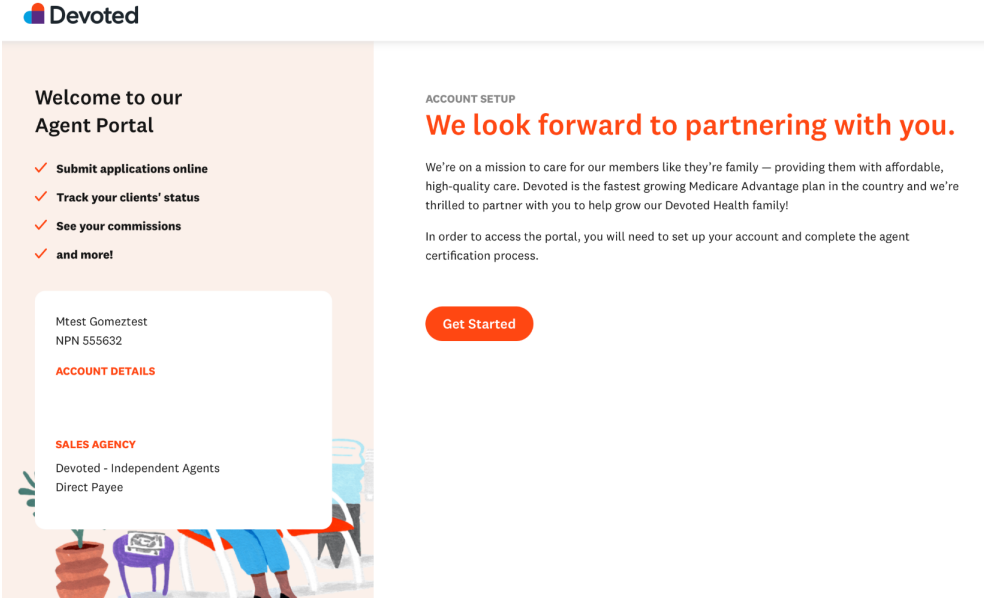
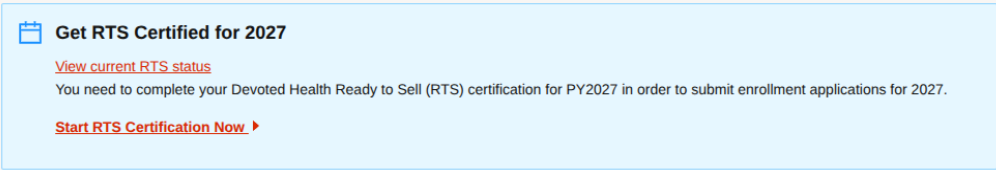
Devoted Health is an HMO and PPO plan with a Medicare contract. Our D-SNPs also have contracts with State Medicaid programs. Enrollment in our plans depends on contract renewal. Our service areas are the following counties in Florida: Broward, Hillsborough, Miami-Dade, Okaloosa, Palm Beach, Pinellas, 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:

|                                 |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                    |
|---------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| 1) Welcome Screen               |  <p>The screenshot shows the Devoted Agent Portal Welcome Screen. At the top left is the Devoted logo. Below it, the text 'Welcome to our Agent Portal' is displayed. A list of features with checkmarks includes: 'Submit applications online', 'Track your clients' status', 'See your commissions', and 'and more!'. A white box contains the user's name 'Mtest Gomeztest' and NPN '555632'. Below this, 'ACCOUNT DETAILS' and 'SALES AGENCY' (Devoted - Independent Agents, Direct Payee) are listed. On the right, under 'ACCOUNT SETUP', the text reads 'We look forward to partnering with you.' followed by a mission statement and a 'Get Started' button.</p>                                        |
| 1b) Existing Agent Portal Users | <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 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 3</a></li></ul>  <p>The screenshot shows a banner titled 'Get RTS Certified for 2027'. It includes a link 'View current RTS status', a paragraph stating 'You need to complete your Devoted Health Ready to Sell (RTS) certification for PY2027 in order to submit enrollment applications for 2027.', and a link 'Start RTS Certification Now.' with a right-pointing arrow.</p> |

## 2) Contact Info & Preferred Language

- Enter the 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. (You can opt out at any time)
- Next, select your language preference.
- Select continue when finished.

### 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:

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

☒ Yes ☐ No

Back

Continue

|                                                     |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                     |
|-----------------------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
|                                                     | <div> <div> <h3>Welcome to our Agent Portal</h3> <ul style="list-style-type: none"> <li>✓ Register to sell Devoted Health</li> <li>✓ Submit applications online</li> <li>✓ Track your clients' status</li> <li>✓ See your commissions</li> </ul> <div> Travis Hutchins TEST ACCOUNT<br/> NPN 12312312345 </div> <div> <b>ACCOUNT DETAILS</b><br/> <div></div> </div> <div> <b>SALES AGENCY</b><br/> Devoted Health - Independent Agent<br/> Direct Payee </div> </div> <div> <div>ACCOUNT SETUP</div> <h3>Which languages do you speak?</h3> <div> <input type="checkbox"/> English <input type="checkbox"/> Spanish </div> <div> <input type="checkbox"/> Chinese <input type="checkbox"/> Creole </div> <div> <input type="checkbox"/> Korean <input type="checkbox"/> Russian </div> <div> <input type="checkbox"/> Vietnamese <input type="checkbox"/> French </div> <div> <input type="checkbox"/> German <input type="checkbox"/> Laotian </div> <div> Other Languages:<br/> <input type="text"/> Add any additional languages here </div> <div> <input type="button" value="Back"/> <input type="button" value="Continue"/> </div> </div> </div>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                             |
| <p>3) Certification Overview - <i>All users</i></p> | <ul style="list-style-type: none"> <li>“Overview” provides key information related to the certification process and next steps.</li> </ul> <div> <h3>Agent Certification Overview for 2027</h3> <h4>How it works</h4> <p>You'll need to complete our certification process to be ready to sell. The Center for Medicare &amp; 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:</p> <ul style="list-style-type: none"> <li>Agent Agreement</li> <li>Code of Conduct Acknowledgement</li> <li>Background Check Consent</li> <li>Certification Trainings <ul style="list-style-type: none"> <li>Medicare Core Training or equivalent (AHIP, Pinpoint, or NABIP (formerly NAHUJ))</li> <li>CMS, Fraud, Waste &amp; Abuse Training or equivalent (AHIP, Pinpoint, or NABIP (formerly NAHUJ))</li> <li>CMS Compliance Training or equivalent (AHIP, Pinpoint, or NABIP (formerly NAHUJ))</li> <li>Devoted Health Product Training</li> </ul> </li> <li>Devoted Health Certification Exam <ul style="list-style-type: none"> <li>You'll have 3 attempts to pass the exam with a minimum score of 85%</li> <li>Each time the exam is initiated it will count as an attempt and must be completed in one sitting (60 mins)</li> </ul> </li> </ul> <p>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.</p> <p>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 <a href="tel:877-764-9446">877-764-9446</a>.</p> <h4>How long does the certification process take?</h4> <p>It takes approximately 4-12 business days to review and process the certification.</p> <ul style="list-style-type: none"> <li><b>Certificate Review:</b> 1-2 business days</li> <li><b>Background Check:</b> 1-2 business days</li> <li><b>Appointment:</b> up to 7 business days (varies by state, new Devoted agents ONLY)</li> </ul> <h4>Have questions or need help?</h4> <p>Call Agent Support at <a href="tel:877-764-9446">877-764-9446</a>. Weekdays, 9am to 10pm Eastern (Dec 8 - Oct 14)</p> <div> <input type="button" value="Start Certification"/> </div> </div> |

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

- Enter your most up-to-date tax information. This will be used to process any required documents (e.g. 1099 forms, etc).

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)

\* Social Security Number / Individual Taxpayer Identification Number:

\* Federal Tax Classification:

Select Federal Tax Classification ... 

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

\* Address:

Where we will mail your tax documents

\* City:

\* State:

State 

\* Zip:

### 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 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 divk 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:

To sign, please type your full name exactly as follows: Vivian Hua

[Back](#) [Continue](#)

|                                                    |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                            |
|----------------------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <p>5) Opt in to electronic 1099</p>                | <ul style="list-style-type: none"> <li>Individuals may receive their 1099 electronically instead of by paper by choosing the opt in option in this section.</li> </ul> <div> <p>AGENT CERTIFICATION</p> <h3>1099 delivery preference</h3> <p>Click the button below to open the document in a new window.</p> <p><a href="#">View Electronic 1099 Consent</a></p> <p>I agree to receive my 1099 electronically:</p> <p> <input checked="" type="radio"/> Yes         <input type="radio"/> No       </p> <p>* Signature:</p> <p>Travis Hutchins-Direct</p> <p> <input checked="" type="checkbox"/> Signature accepted.         <a href="#">Clear Signature</a> </p> <p> <a href="#">Back</a> <a href="#">Continue</a> </p> </div>                                                                                                                                                                                                                                                                                                                                                          |
| <p>6) Direct Deposit -<br/>(Direct Payee only)</p> | <ul style="list-style-type: none"> <li>Fill in your current direct deposit information. Note - you will be able to update this information at any time from the “My Account” option on the top right of the page.</li> </ul> <div> <p>AGENT CERTIFICATION</p> <h3>Direct Deposit</h3> <p>Please provide your deposit information</p> <p>* Banking Institution:</p> <p> <input type="text"/> </p> <p>       * Account Type:       <input type="radio"/> Checking       <input type="radio"/> Savings     </p> <p>       * Ownership Type:       <input type="radio"/> Personal account       <input type="radio"/> Business account     </p> <p>       * Routing Number:       <input type="text"/> </p> <p>       * Confirm Routing Number:       <input type="text"/> </p> <p>       * Account Number:       <input type="text"/> </p> <p>       * Confirm Account Number:       <input type="text"/> </p> <p>  </p> <p> <a href="#">Back</a> <a href="#">Continue</a> </p> <p>QA: Skip Ste</p> </div> |

7) Preferred Markets

- Select which model of sales applies to you (*field sales, telesales (your agency is approved by DH), or both*).
- 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, you can update in the future as noted in the “Update your State” License section.*

AGENT CERTIFICATION

**Where you plan to sell in 2027**

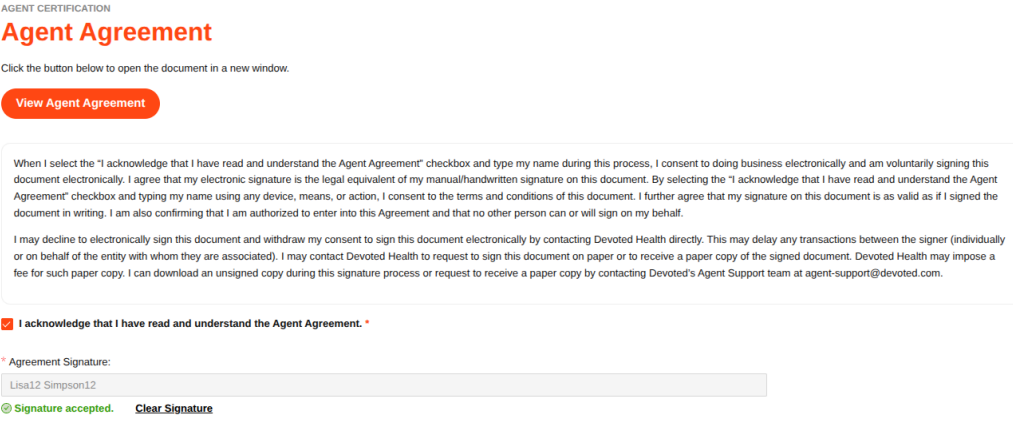
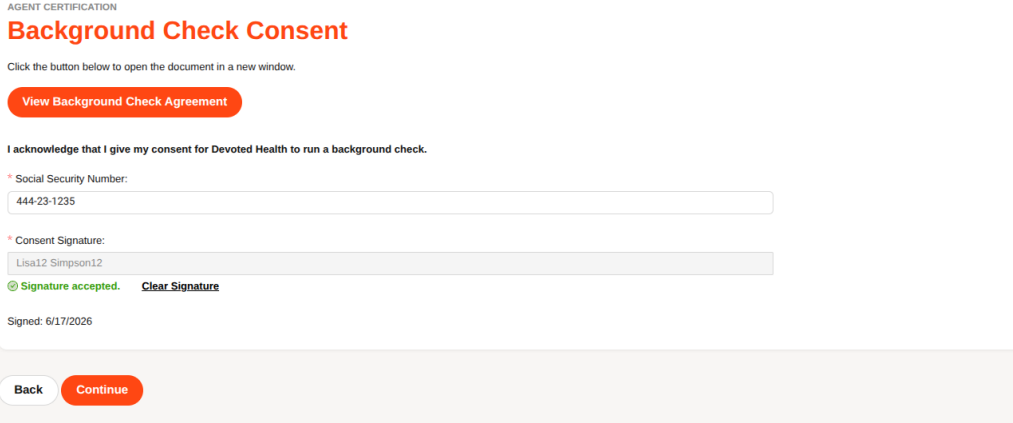
The following information helps us manage state appointments, and build better tools and trainings for our broker partners.

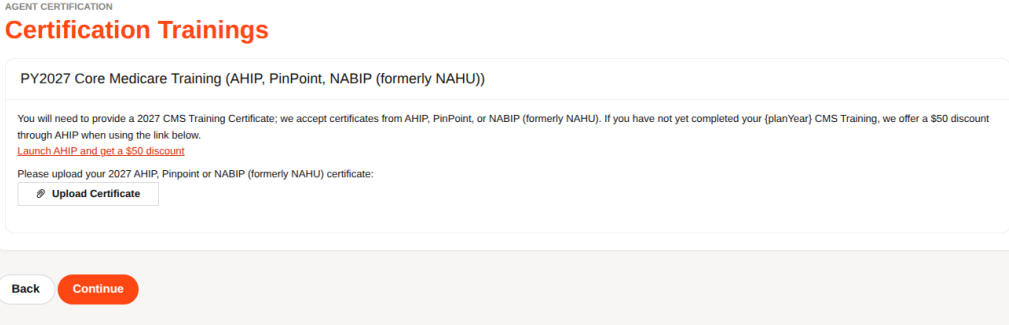
In which state(s) do you plan to sell? \*

|                                      |                                   |
|--------------------------------------|-----------------------------------|
| <input type="checkbox"/> Alabama     | <input type="checkbox"/> Arizona  |
| <input type="checkbox"/> Arkansas    | <input type="checkbox"/> Colorado |
| <input type="checkbox"/> Connecticut | <input type="checkbox"/> Delaware |
| <input type="checkbox"/> Florida     | <input type="checkbox"/> Georgia  |
| <input type="checkbox"/> Hawaii      | <input type="checkbox"/> Illinois |
| <input type="checkbox"/> Indiana     | <input type="checkbox"/> Iowa     |
| <input type="checkbox"/> Kansas      | <input type="checkbox"/> Kentucky |
| <input type="checkbox"/> Louisiana   | <input type="checkbox"/> Michigan |
| <input type="checkbox"/> Mississippi | <input type="checkbox"/> Missouri |

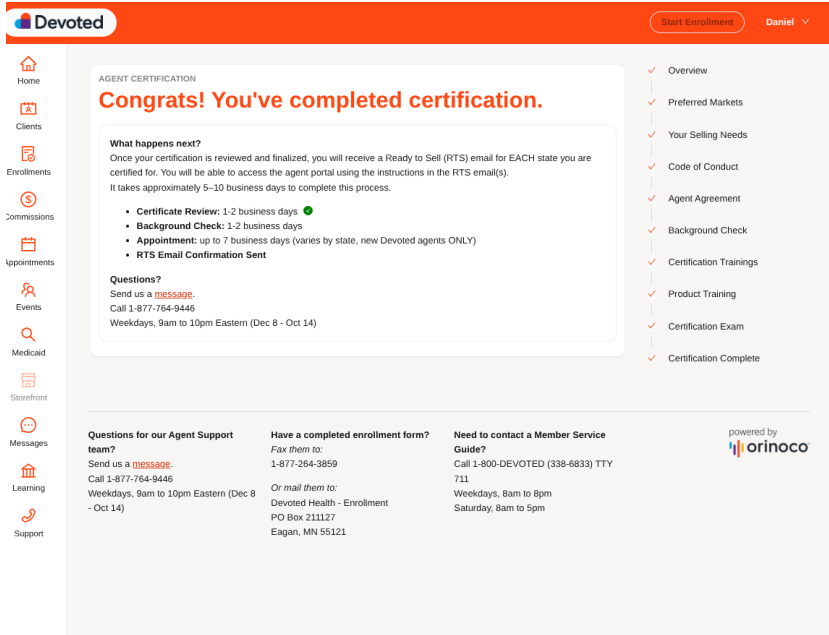
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|-------------------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
|                                                 | <div data-bbox="500 212 1503 669"> <div><input type="checkbox"/> Nebraska</div> <div><input type="checkbox"/> New Hampshire</div> <div><input type="checkbox"/> New Jersey</div> <div><input type="checkbox"/> New Mexico</div> <div><input type="checkbox"/> New York</div> <div><input type="checkbox"/> North Carolina</div> <div><input type="checkbox"/> Ohio</div> <div><input type="checkbox"/> Oklahoma</div> <div><input type="checkbox"/> Oregon</div> <div><input type="checkbox"/> Pennsylvania</div> <div><input type="checkbox"/> South Carolina</div> <div><input type="checkbox"/> Tennessee</div> <div><input type="checkbox"/> Texas</div> <div><input type="checkbox"/> Utah</div> <div><input type="checkbox"/> Virginia</div> <div><input type="checkbox"/> Washington</div> </div> <div data-bbox="500 688 1273 772"> <p>What is your primary market? *</p> <p>Primary market:</p> <div>Select Primary Market</div> </div>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                               |
| <p>8) Your Selling Needs - <i>All users</i></p> | <ul style="list-style-type: none"> <li>● 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 to the best of your availability.</li> </ul> <p><b>Tell us about your needs</b></p> <p><b>Tell us a little bit about you</b></p> <p>Select all that apply</p> <div> <input checked="" type="checkbox"/> I am a veteran         <input type="checkbox"/> I am a Devoted member         <input type="checkbox"/> I have a family member who is on Devoted       </div> <p><b>Help us understand your selling needs and how we can best support you</b></p> <p>What is your primary goal for certifying with Devoted Health? *</p> <div>Support and service my existing Book of Business</div> <p>What is the approximate size of your Medicare Advantage Book of Business currently?</p> <div>1-50</div> <p>Do you sell telephonically? *</p> <div> <div>Yes</div> <div>No</div> </div> <p>If yes, approximately what percent of your sales are telephonic vs. in person? *</p> <div>25% telephonic vs. 75% in person</div> <p>Approximately how much of your annual Medicare Advantage business do you sell during AEP, relative to OEP and lock-in? *</p> <div>50-75%</div> <p>What marketing demographics do you work with? (select all that apply) *</p> <div> <input type="checkbox"/> None of the below         <input type="checkbox"/> Age-ins/retriring soon         <input type="checkbox"/> D-SNP/Low income         <input type="checkbox"/> Veteran         <input type="checkbox"/> English as a second language         <input type="checkbox"/> Business/Commercial retiree         <input checked="" type="checkbox"/> AEP focus only         <input type="checkbox"/> Other       </div> <div>Please enter any other marketing demographics</div> |

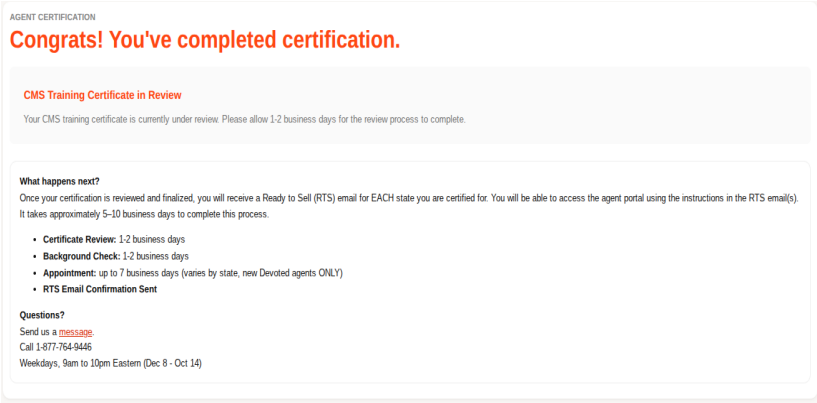
|                                           |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                |
|-------------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
|                                           | <p><b>Which other lines of business do you actively sell? *</b></p> <p> <input type="checkbox"/> None of the below<br/> <input checked="" type="checkbox"/> Medicare Supplement<br/> <input type="checkbox"/> Annuities<br/> <input checked="" type="checkbox"/> Life Insurance<br/> <input type="checkbox"/> Property &amp; Casualty<br/> <input type="checkbox"/> Voluntary Health (Hospital Indemnity, Dental, etc)<br/> <input type="checkbox"/> Affordable Care Act<br/> <input type="checkbox"/> Other         </p> <p>Please enter the other line of business</p> <p><b>Do you currently work in the community or table any retail locations? *</b></p> <p>I work in the community (ie. tables, festivals, etc) and/or table retail locations</p> <p><b>What is your preferred Medicare Advantage carrier? (select up to 2)</b></p> <p> <input type="checkbox"/> Anthem<br/> <input type="checkbox"/> BlueCross BlueShield regional carrier<br/> <input type="checkbox"/> Centene / Wellcare<br/> <input type="checkbox"/> Cigna<br/> <input type="checkbox"/> CVS Aetna<br/> <input checked="" type="checkbox"/> Devoted Health<br/> <input type="checkbox"/> Humana / Careplus<br/> <input type="checkbox"/> United Healthcare<br/> <input type="checkbox"/> Other         </p> <p>Please enter the other carrier</p> <p><b>Is there anything else you'd like to share with us today?</b></p> <p>Test Test</p> <p> <a href="#">Back</a> <a href="#">Continue</a> </p> |
| <p>9) Code of Conduct<br/>- All users</p> | <ul style="list-style-type: none"> <li>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.</li> </ul> <p><b>Code of Conduct Acknowledgement</b></p> <p>Click the button below to open the document in a new window.</p> <p><a href="#">View Code of Conduct</a></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>Vivian Hua</p> <p> <span>✔ Signature accepted.</span> <a href="#">Clear Signature</a> </p>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                               |

|                                                 |                                                                                                                                                                                                                                                                                                                                                                                                                                                         |
|-------------------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <p>10) 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>                                                                                |
| <p>11) Background Check Consent - All users</p> | <ul style="list-style-type: none"> <li>• The Background check consent will be displayed for your review.</li> <li>• Once you have reviewed this information you must enter your social security number.</li> <li>• Click in the box to sign the form and type in your full name.</li> <li>• The date will be preset, please select the continue button.</li> </ul>  |

|                                                       |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                        |
|-------------------------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <p>12) Certification Trainings - <i>All users</i></p> | <ul style="list-style-type: none"> <li>● If you have a completed AHIP, PinPoint, or NABIP (formerly NAHU) certificate, upload a copy by selecting the upload certificate button.</li> <li>● If you would like to review what certificates we will accept, this can be done by clicking on the Show sample 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> <li>● Please note If you have completed the AHIP course <u>while using our link you can have your score “transmitted” to Devoted Health</u> once you have access to your certificate. This can help us to confirm your results!</li> </ul>  |
| <p>13) Certification Exam - <i>All users</i></p>      | <ul style="list-style-type: none"> <li>● Access our 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>                                                                                                                                                |

|  |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                  |
|--|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
|  | <div> <div>AGENT CERTIFICATION</div> <div>Product Training</div> <div> <div>PY2027 Devoted Health Product Training</div> <div>The 2027 Agent Certification &amp; Product Training informs you on how to compliantly market Devoted Health benefits and satisfy the annual CMS Medicare Compliance Program requirements.</div> <div>Launch Product Training</div> </div> <div> <div>Back</div> <div>Continue to Exam Instructions</div> </div> </div> <div> <div>AGENT CERTIFICATION</div> <div>Certification Exam</div> <div> <div>State Capitals - 2027</div> <div>Attempts Remaining: 3</div> <div>Things to keep in mind</div> <ul style="list-style-type: none"> <li>You have 3 attempts to pass the exam</li> <li>Passing score = 85% or higher</li> <li>Each time the exam is initiated counts as an attempt</li> <li>You should complete the exam in one sitting (60 mins)</li> </ul> <div>What to expect next</div> <div>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.</div> </div> </div> |
|  | <ul style="list-style-type: none"> <li>This will open up this screen where the test will be completed. <ul style="list-style-type: none"> <li>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.</li> <li>All questions and answers will be randomized in each attempt</li> </ul> </li> </ul>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                           |

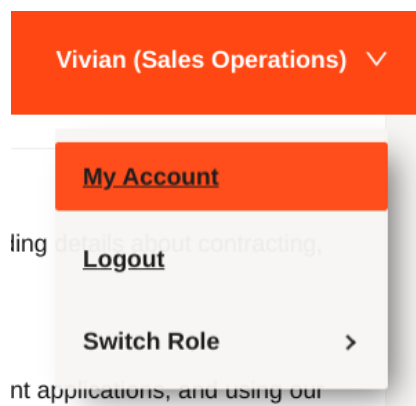
|                                                  |                                                                                                                                                                                                                                                                                                                                                                                                                              |
|--------------------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
|                                                  | <ul style="list-style-type: none"> <li>● Once you have completed and passed the Exam, you will see the following page. <ul style="list-style-type: none"> <li>○ You will be given the option to continue to the final page of your certification. Congratulations!</li> </ul> </li> </ul>                                                                                                                                    |
| <p>Certification Complete - <i>All Users</i></p> | <ul style="list-style-type: none"> <li>● Once your certification is complete, the results for your CMS training certificate submission will be available to view. <ul style="list-style-type: none"> <li>○ If your certificate passed our requirements you will see a green checkmark next to Certificate review:</li> </ul> </li> </ul>  |

|  |                                                                                                                                                                                                               |
|--|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
|  | <ul style="list-style-type: none"> <li>○ If your submission is under review, you will see the following screen:</li> </ul>  |
|--|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|

### III. Update your Demographics & Financial Information

You can view and update your financial information in your Agent Portal account by following the 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 W-9 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

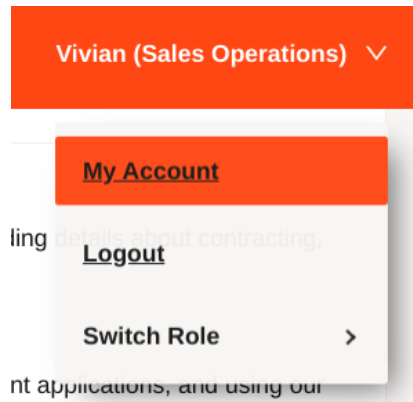
We are missing important details for you. Please complete this section to avoid disruption to your agent account.

Add Direct Deposit

## Update your State Licenses

You can easily update the states where you're licensed directly in your Agent Portal. Just follow the steps below:

- Log in to your Agent Portal account. In the top right corner, click on “ My Account”.



- Go to the “Ready to Sell Overview” section.
- Click on “Update States.”

2026 READY-TO-SELL OVERVIEW ✎ Update States

| Ready To Sell                                      | Outstanding | Certification                         |
|----------------------------------------------------|-------------|---------------------------------------|
| <input type="checkbox"/> Mississippi               |             | <input type="checkbox"/> Missouri     |
| <input checked="" type="checkbox"/> North Carolina |             | <input type="checkbox"/> Ohio         |
| <input type="checkbox"/> Oregon                    |             | <input type="checkbox"/> Pennsylvania |
| <input checked="" type="checkbox"/> South Carolina |             | <input type="checkbox"/> Tennessee    |
| <input checked="" type="checkbox"/> Texas          |             | <input type="checkbox"/> Washington   |

Save Cancel

**Important:**

Agents are only permitted to market and sell in states where they are both licensed and have selected the state in their Devoted Health profile.

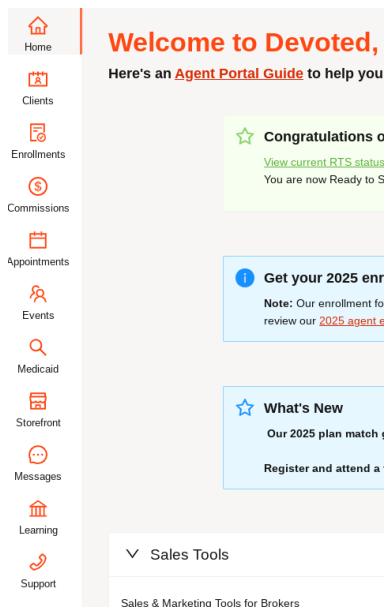
## IV.Messages

### Onboarding Status

If you have any questions or concerns during onboarding, you may contact our Devoted team by calling into the Agent Support line or send a message on your Agent Portal account. The messages icon is located on the side menu to the left of the page. Our Agent Support team will respond to your message within 2 business days.

### In Review and Active Status

When you have completed certification, the rest of the icons on the side menu will also be displayed. *Please note, agents in review status will not be able to access the Storefront until certified.*



### Rejected CMS Certification

If the CMS certification submitted during onboarding does not meet the requirements, you will be notified at the end of the certification process.. The notification will look like this:

## Congrats! You've completed certification.

### CMS Training Certificate Re-upload Required

It appears the CMS certificate you provided was rejected after internal review. Your submission did not meet one or all of the following requirements:

- Certificates must be directly from one of our approved providers: AHIP, NABIP, or PinPoint.
- Certificates must show that the completed course is for the most recent course/current plan year.
- The name on your certificate matches exactly to your name in your Devoted agent portal account.

Re-submit your CMS certificate for review. Please allow 1-2 business days for our team to process the new certificate.

- Agent Contracting Team

### PY2026 Core Medicare Training (AHIP, PinPoint, NABIP (formerly NAHU))

You will need to provide a 2026 CMS Training Certificate; we accept certificates from AHIP, PinPoint, or NABIP (formerly NAHU).



#### What does a CMS Training Certificate look like?

Not sure which file to upload? Click below to see an example of what your CMS training certificate should look like.

[Show Example Certificate](#)

Please upload your 2026 AHIP, Pinpoint or NABIP (formerly NAHU) certificate:

[Upload Certificate](#)

[Submit New Certificate](#)

- To upload the new certificate, click on the “Upload Certificate” button and then the “Submit New Certificate” button. Once a new certificate is submitted please allow 10 seconds to pass before refreshing the page.
- Once a certificate is accepted, this will be confirmed by the following screen showing a check mark within a green circle next to the Certificate Review section.

## Congrats! You've completed certification.

### What happens next?

Once your certification is reviewed and finalized, you will receive a Ready to Sell (RTS) email for EACH state you are certified for. You will be able to access the agent portal using the instructions in the RTS email(s).

It takes approximately 5–10 business days to complete this process.

- **Certificate Review:** 1-2 business days
- **Background Check:** 1-2 business days
- **Appointment:** up to 7 business days (varies by state, new Devoted agents ONLY)
- **RTS Email Confirmation Sent**

### Questions?

Send us a [message](#).

Call 1-877-764-9446

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

### Questions for our Agent Support team?

Send us a [message](#).

Call 1-877-764-9446

### Have a completed enrollment form?

Fax them to:

1-877-264-3859

### Need to contact a Member Service Guide?

Call 1-800-DEVOTED (338-6833) TTY 711

Weekdays, 8am to 8pm

## Important

Please allow 2 business days for our Sales Operations team to review the newly uploaded certificate.

## V.Agent Status

### Overview

This section will provide context regarding an agent's status within our system. This will detail the different statuses, their implications for certification capabilities, and any commission limitations.

### Definitions

- **Onboarding** - Agent has not started certification or agent is in process of completing certification.
- **In Review** - Agent is waiting for certification to process.
  - Agent action required has been completed within the certification. Devoted is reviewing the results and will contact the agent if additional information is needed.
- **Active** - Agent is an active contracted agent with Devoted.
  - Agents can find their **Ready-To-Sell (RTS) status** for all plan years and states within the READY-TO-SELL OVERVIEW section of their Agent Portal.
- **Suspended With Pay** - Agent is an active contracted agent with Devoted.
  - Agent **cannot sell or market** Devoted products currently based on suspension
  - Agent **will** continue to receive commissions and renewals for sales submitted prior to suspension.
- **Suspended Without Pay** - Agent is an active contracted agent with Devoted.
  - Agent **cannot sell or market** Devoted products currently based on suspension.
  - Agent **will not** receive commission or ongoing renewals while suspended.
- **Inactive** - Agent is not currently contracted with Devoted. To become contracted with Devoted again, agent must reach out to Agent Support at 1-877-764-9446 or send us a message in the Agent Portal to reactivate their account.

### Certification and Commission

| Agent Status                 | Can Certify | Approved to Write | Paid Commissions |
|------------------------------|-------------|-------------------|------------------|
| <i>Active</i>                | Yes         | Yes*              | Yes              |
| <i>Suspended With Pay</i>    | Yes         | No                | Yes              |
| <i>Suspended Without Pay</i> | No          | No                | No               |

|                          |            |           |           |
|--------------------------|------------|-----------|-----------|
| <b><i>Inactive</i></b>   | <i>No</i>  | <i>No</i> | <i>No</i> |
| <b><i>Onboarding</i></b> | <i>Yes</i> | <i>No</i> | <i>No</i> |
| <b><i>In Review</i></b>  | <i>No</i>  | <i>No</i> | <i>No</i> |

\*Agents must check their 2027 READY-TO-SELL OVERVIEW on the Agent Portal to ensure they are approved to write for the current year. If there is an issue, please reach out to Agent Support at 1-877-764-9446 or send us a message in the Agent Portal.

### **Questions?**

Contact us at 1-877-764-9446 or send us a message on your Agent Portal account. Or contact your local [Devoted Sales Leader](#).