agent-support@devoted.com
1-877-764-9446

Agent Portal Onboarding Quick Start Guide

Table of Contents

agent-support@devoted.com
1-877-764-9446

I. Introduction

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

Important Things to Know

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

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

Onboarding and certification steps:

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

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

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

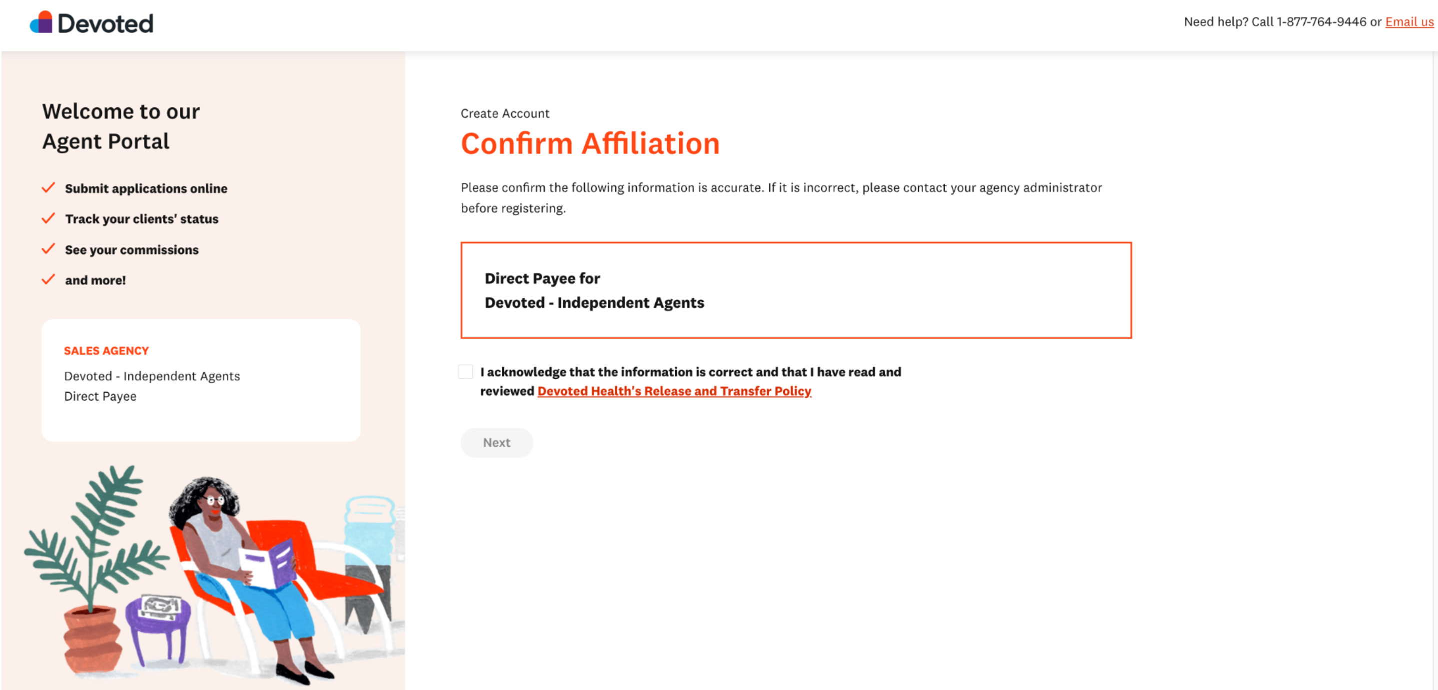
Agents cannot market or sell Devoted Health benefits until they receive the "ready to sell"(RTS) email.

**PY2022 certification only available for AZ, FL, IL, OH, TX existing service areas.*

II. Getting Started

Account Creation

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


Devoted

Need help? Call 1-877-764-9446 or Email us

Welcome to our Agent Portal

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

SALES AGENCY
Devoted - Independent Agents
Direct Payee

Create Account

Confirm Affiliation

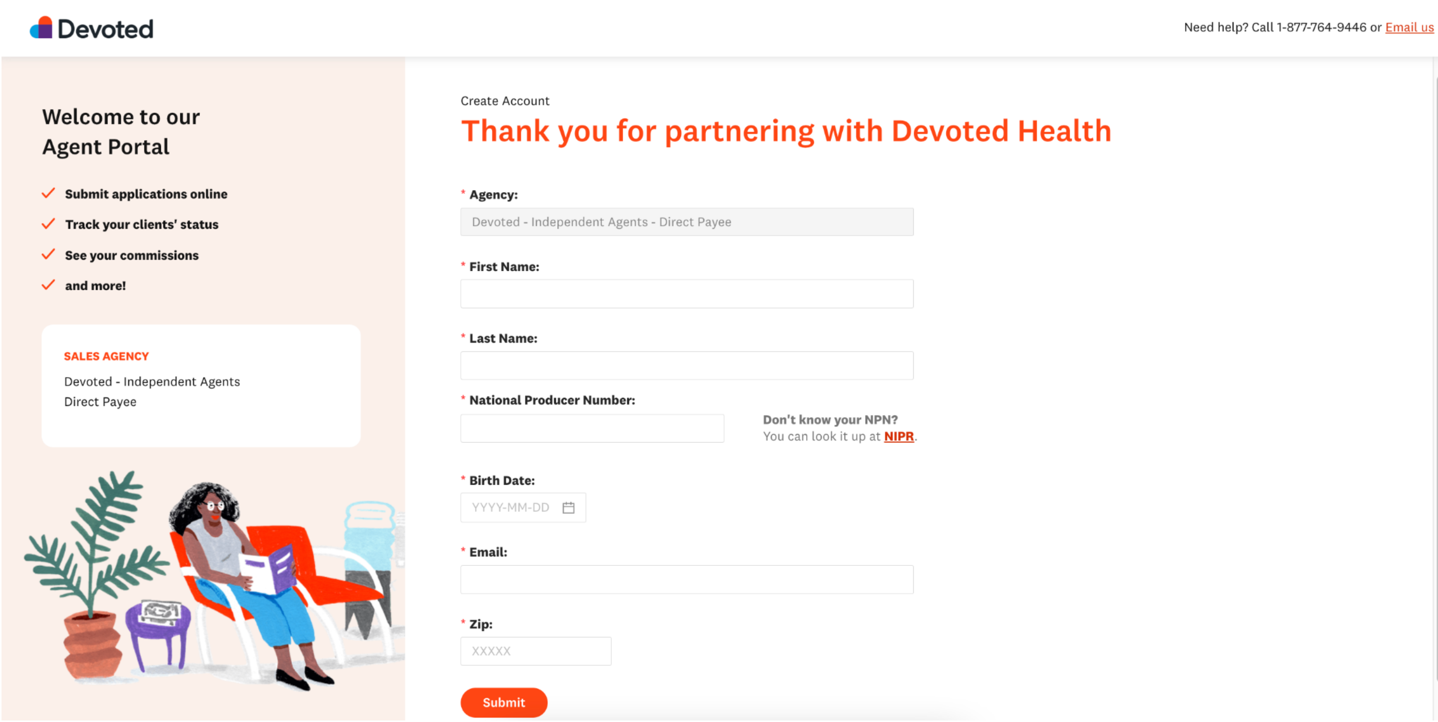
Please confirm the following information is accurate. If it is incorrect, please contact your agency administrator before registering.

Direct Payee for
Devoted - Independent Agents

I acknowledge that the information is correct and that I have read and reviewed Devoted Health's Release and Transfer Policy

Next

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


Devoted

Need help? Call 1-877-764-9446 or Email us

Welcome to our Agent Portal

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

SALES AGENCY
Devoted - Independent Agents
Direct Payee

Create Account

Thank you for partnering with Devoted Health

* **Agency:** Devoted - Independent Agents - Direct Payee

* **First Name:**

* **Last Name:**

* **National Producer Number:**

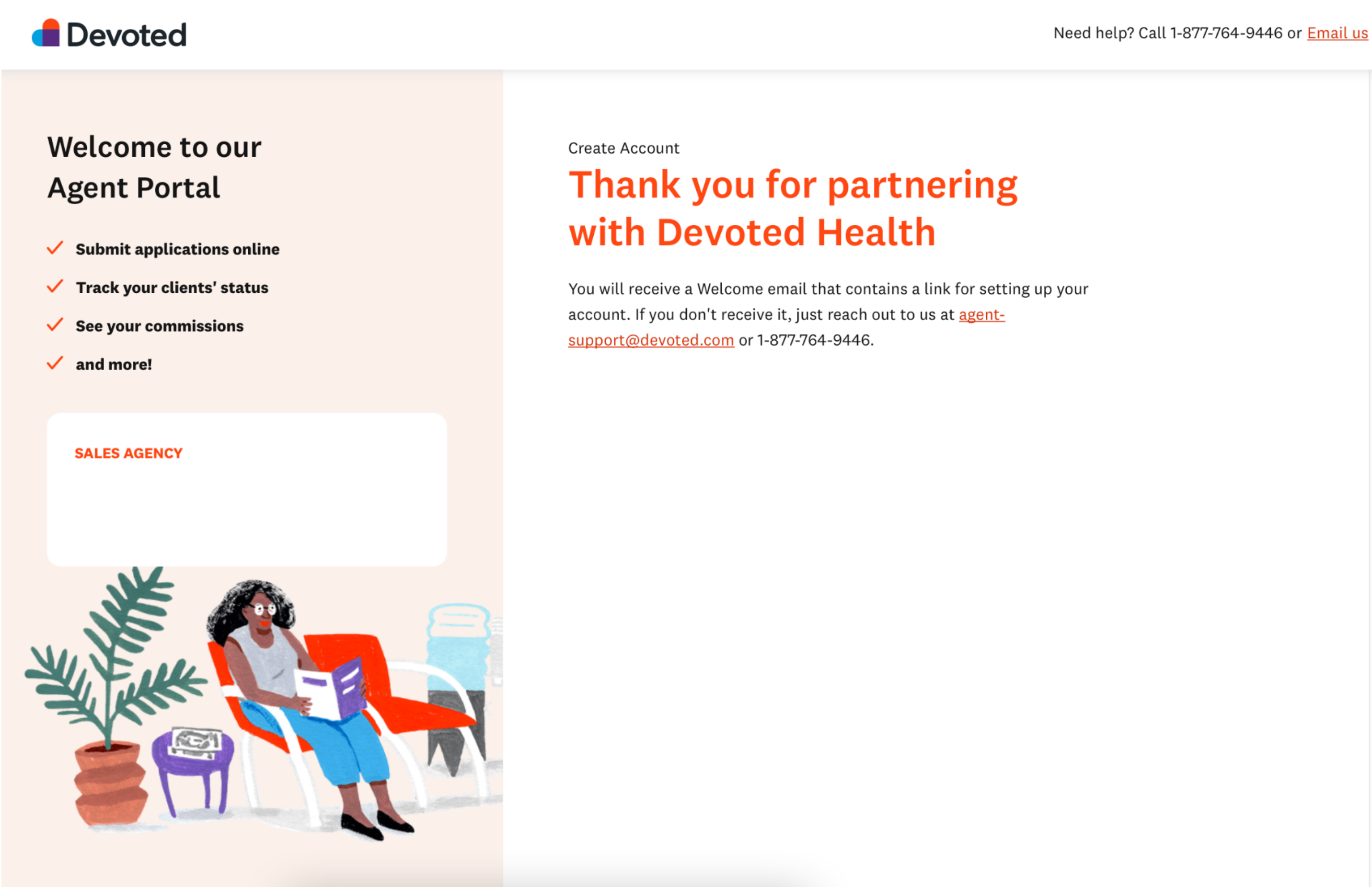
Don't know your NPN?
You can look it up at **NIPR**.

* **Birth Date:** YYYY-MM-DD

* **Email:**

* **Zip:** XXXXX

Submit

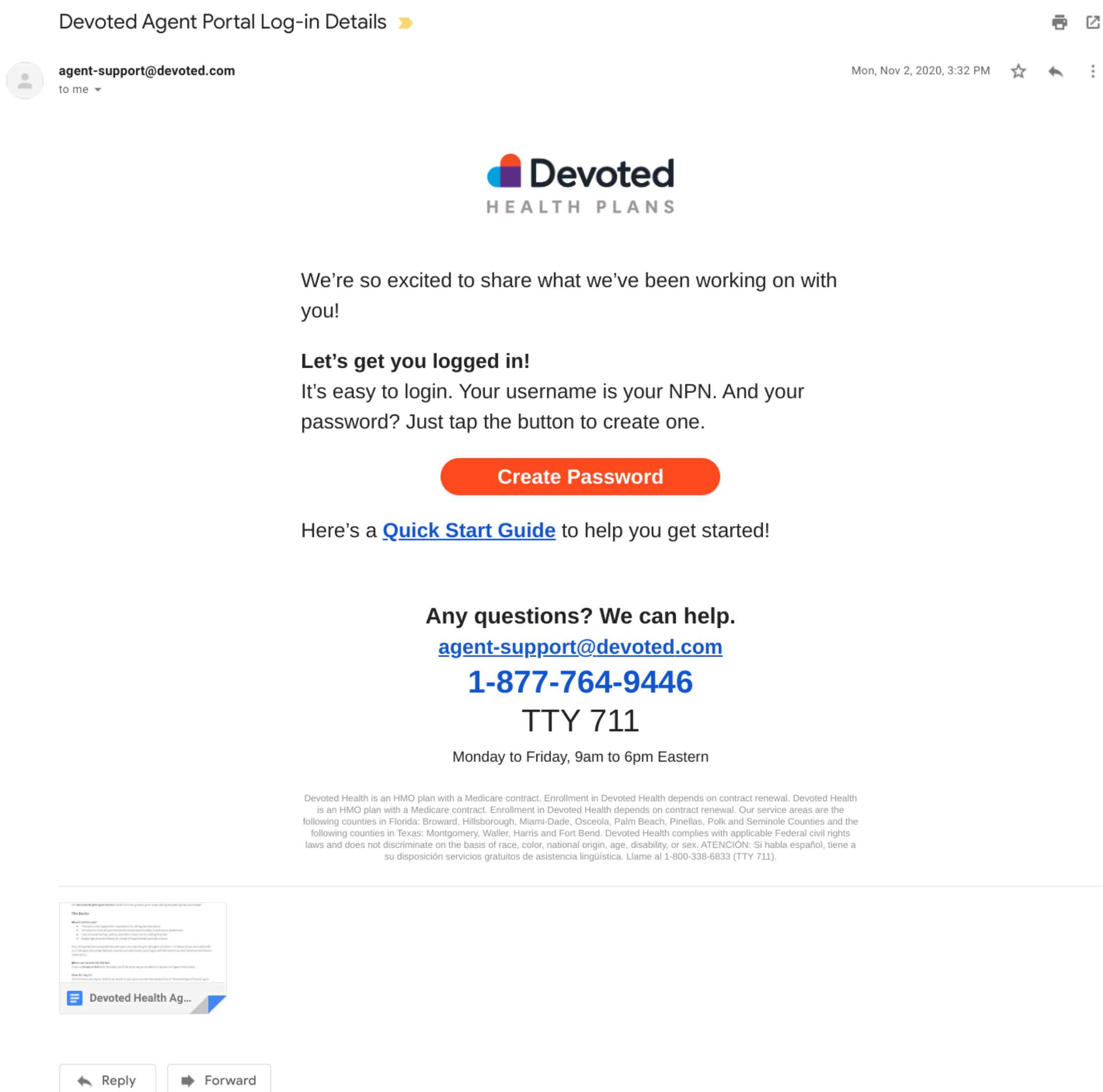


- If your information is already linked to an account, then you will be prompted to log in to your account using your credentials, or contact Agent Support for assistance at 1-877-764-9446.

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:

agent-support@devoted.com
1-877-764-9446



Devoted Agent Portal Log-in Details

agent-support@devoted.com
to me

Mon, Nov 2, 2020, 3:32 PM

Devoted
HEALTH PLANS

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

Let's get you logged in!
It's easy to login. Your username is your NPN. And your password? Just tap the button to create one.

Create Password

Here's a **Quick Start Guide** to help you get started!

Any questions? We can help.
agent-support@devoted.com
1-877-764-9446
TTY 711
Monday to Friday, 9am to 6pm Eastern

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

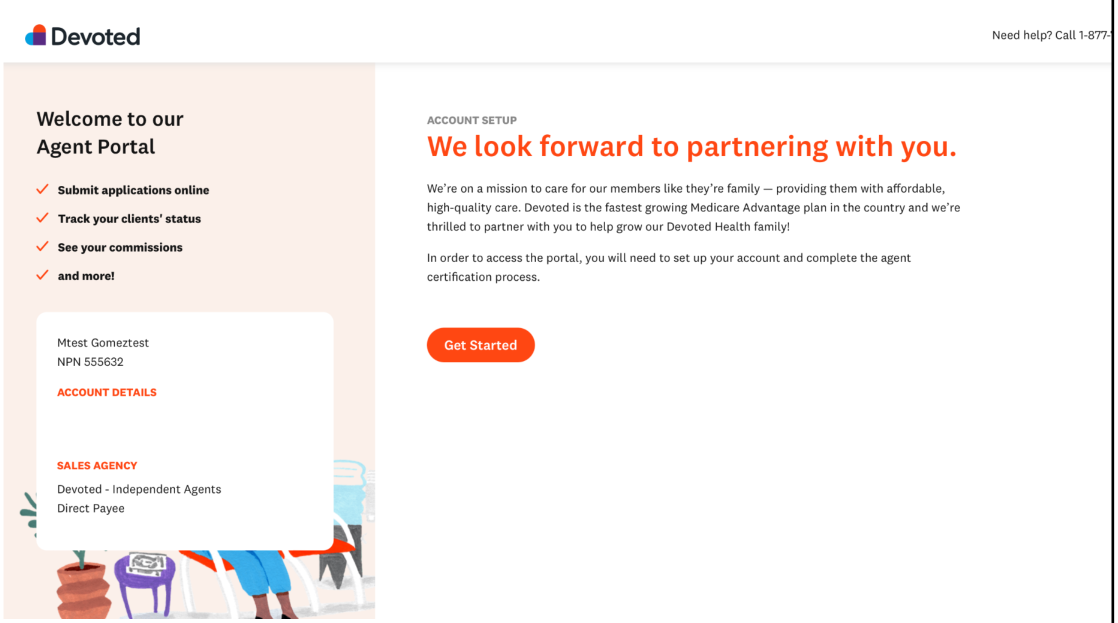
Devoted Health Ag...

Reply Forward

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

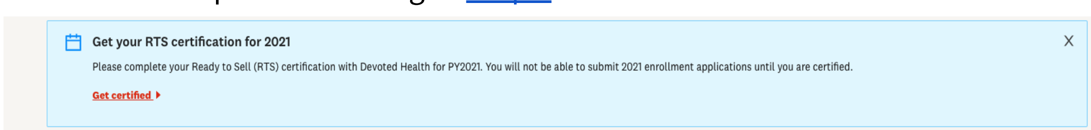
Start the process

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

<table>
<tr>
<td>1) Welcome Screen</td>
<td>


</td>
</tr>
<tr>
<td>1b) Existing Agent Portal Users</td>
<td>

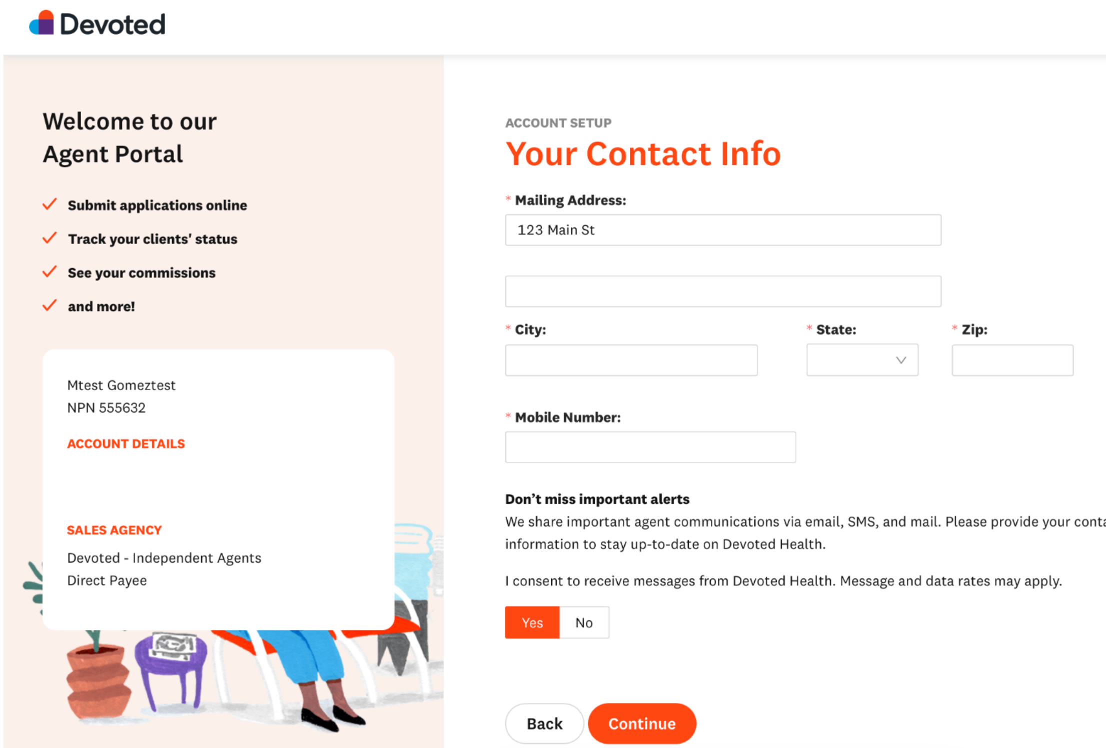
If you are an existing agent, you will log into your Agent Portal account and click on the banner to start your PY2023 Onboarding and certification process
This will open up a new window as seen below and you should be able to start the process starting on step 5



</td>
</tr>
</table>

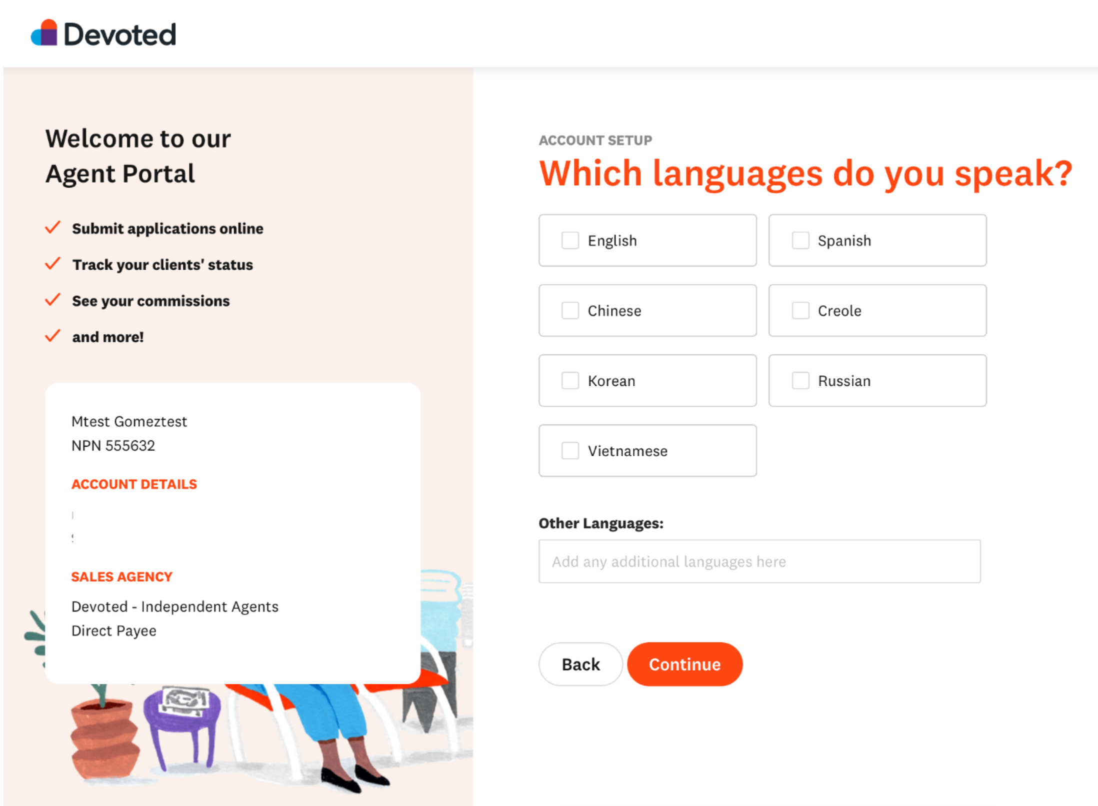
<table>
<tr>
<td>2) Contact Info & Preferred Language</td>
<td>

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



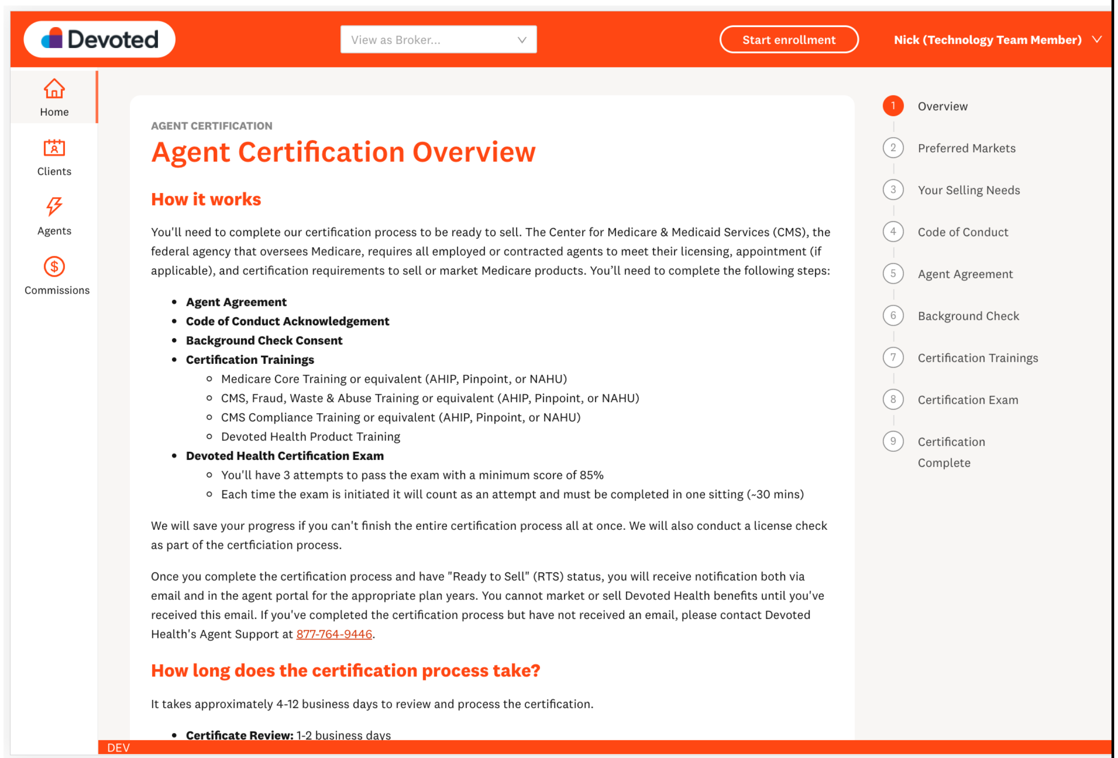
</td>
</tr>
</table>

agent-support@devoted.com
1-877-764-9446

<table>
<tr>
<td></td>
<td>
</td>
</tr>
<tr>
<td>3) Certification Overview - All users</td>
<td>

Overview provides key information related to the certification process and next steps.
Click the Start Certification button. Your progress will be saved during the process - you can leave and finish later at any time.

</td>
</tr>
</table>

<table>
<tr>
<td></td>
<td>
</td>
</tr>
<tr>
<td>4) Taxpayer Identification and Attestation (W-9) - (Direct Payee Only)</td>
<td>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)</td>
</tr>
</table>

agent-support@devoted.com
1-877-764-9446

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

- 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:

- [x] 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
- [x] 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
- [x] I am a U.S. citizen or other U.S. person (defined in the instructions); and
- [x] 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.

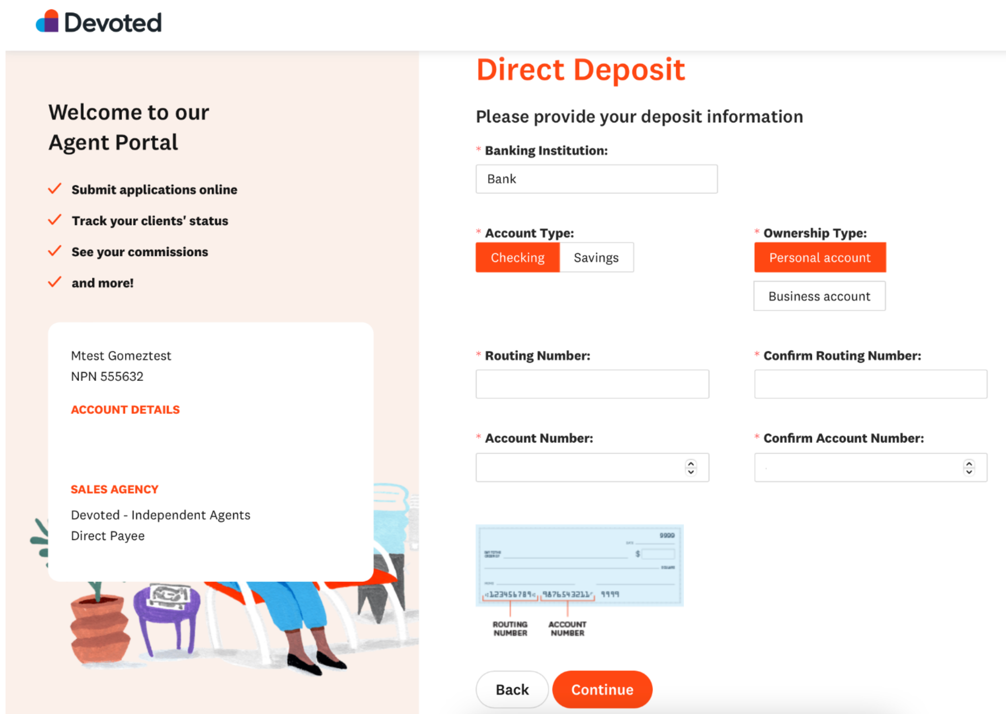
The Internal Revenue Service does not require your consent to any provision of this section other than the certifications required to avoid backup withholding.

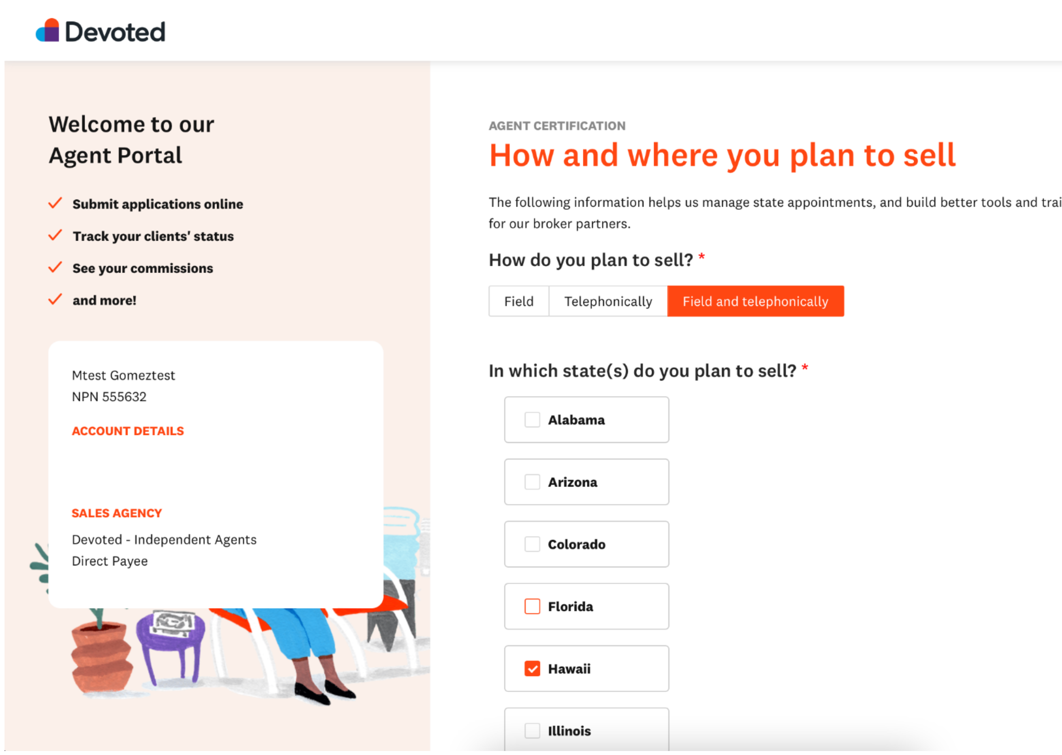
* Signature:

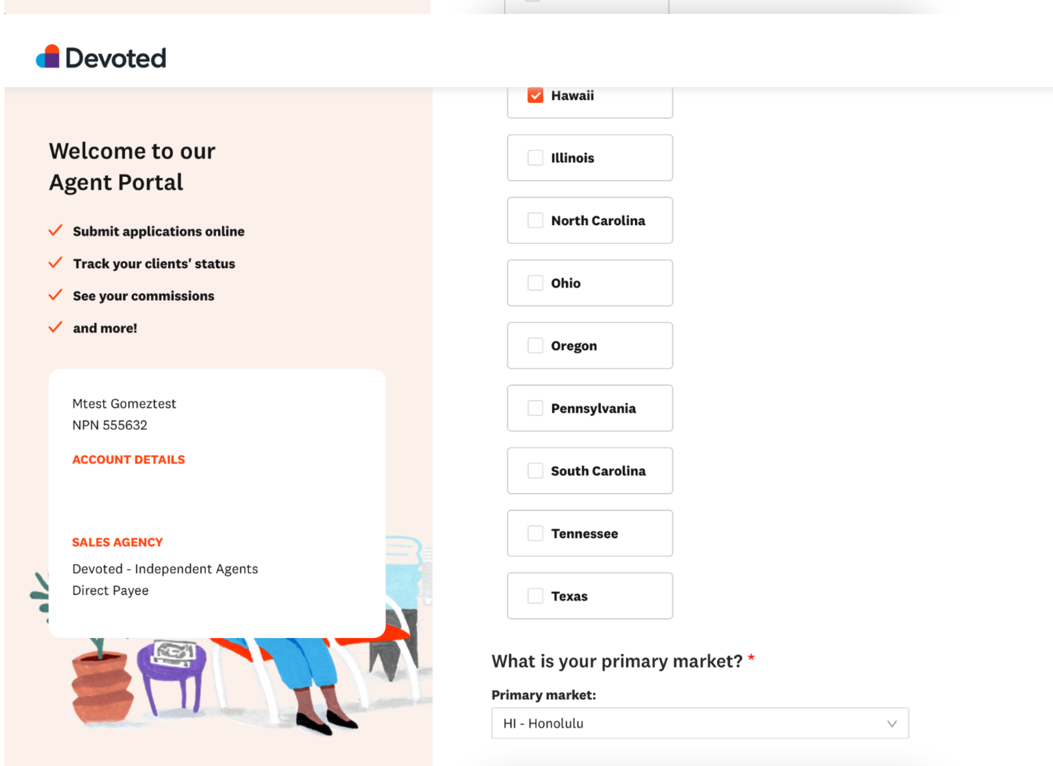
Signature accepted. Clear Signature

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


Devoted
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
How and where you plan to sell
The following information helps us manage state appointments, and build better tools and trai
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

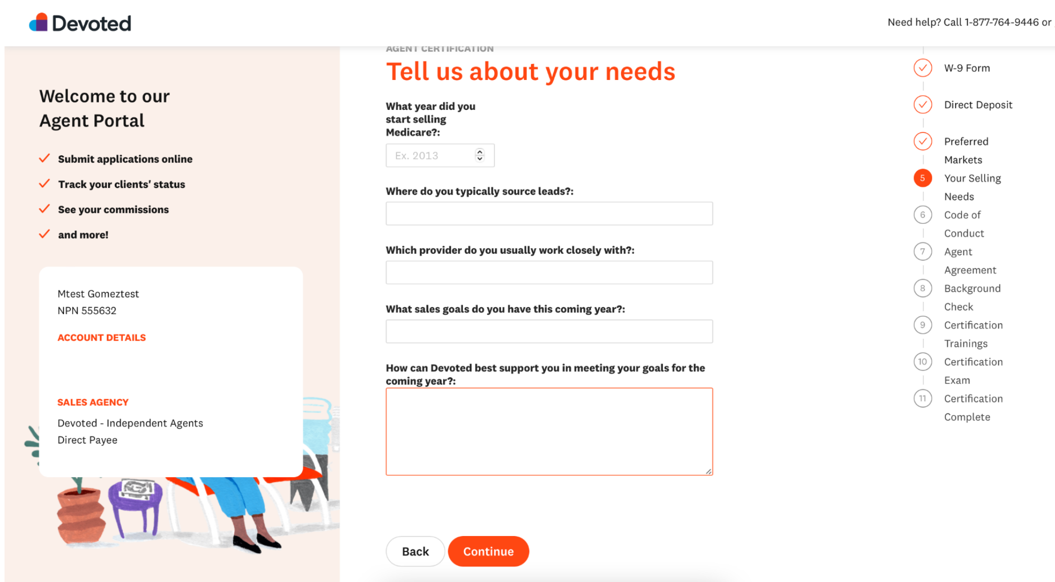

Devoted
Welcome to our Agent Portal
Submit applications online
Track your clients' status
See your commissions
and more!
Mtest Gomeztest
NPN 555632
ACCOUNT DETAILS
SALES AGENCY
Devoted - Independent Agents
Direct Payee
Hawaii
Illinois
North Carolina
Ohio
Oregon
Pennsylvania
South Carolina
Tennessee
Texas
What is your primary market? *
Primary market:
HI - Honolulu

Devoted HEALTH PLANS

agent-support@devoted.com
1-877-764-9446

<table>
<tr>
<td>7) Your Selling Needs - All users</td>
<td>

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

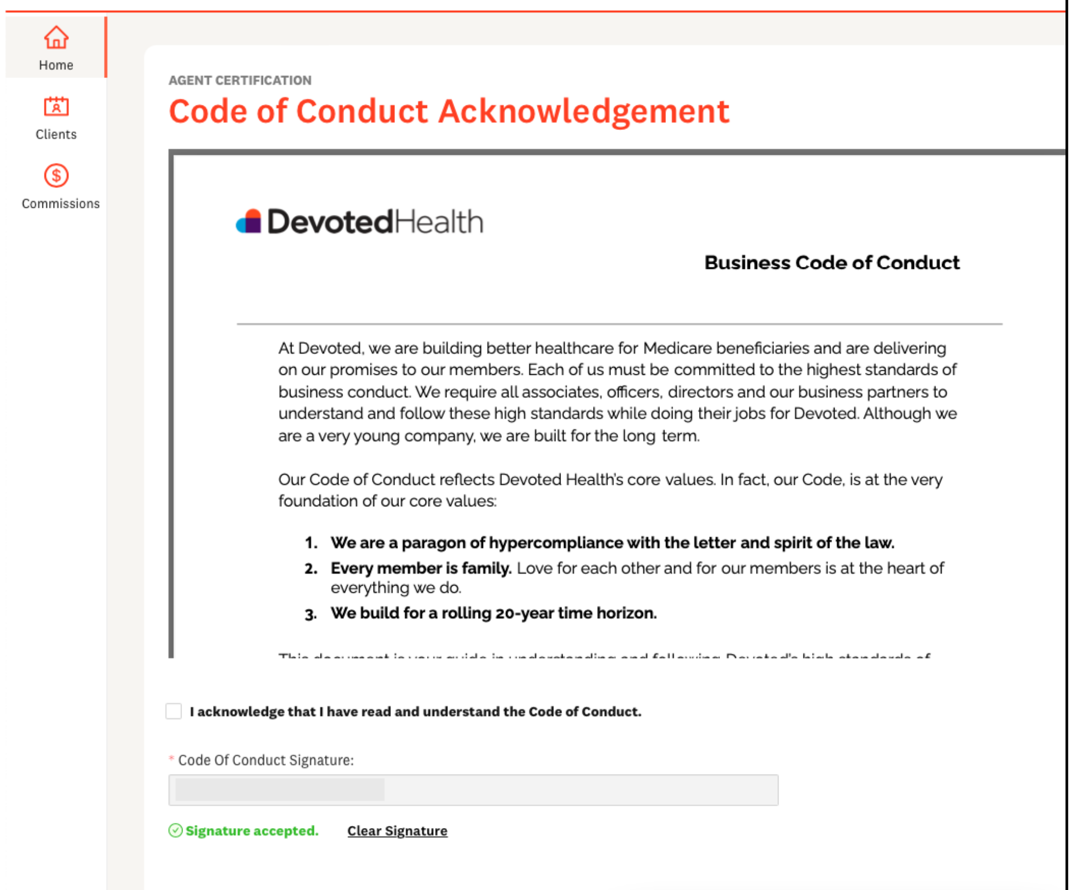


</td>
</tr>
<tr>
<td>8) Code of Conduct - All users</td>
<td>

- 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.

</td>
</tr>
</table>

agent-support@devoted.com
1-877-764-9446

<table>
<tr><td></td><td>
</td></tr>
<tr><td>9) Agent Agreement - All users</td><td>

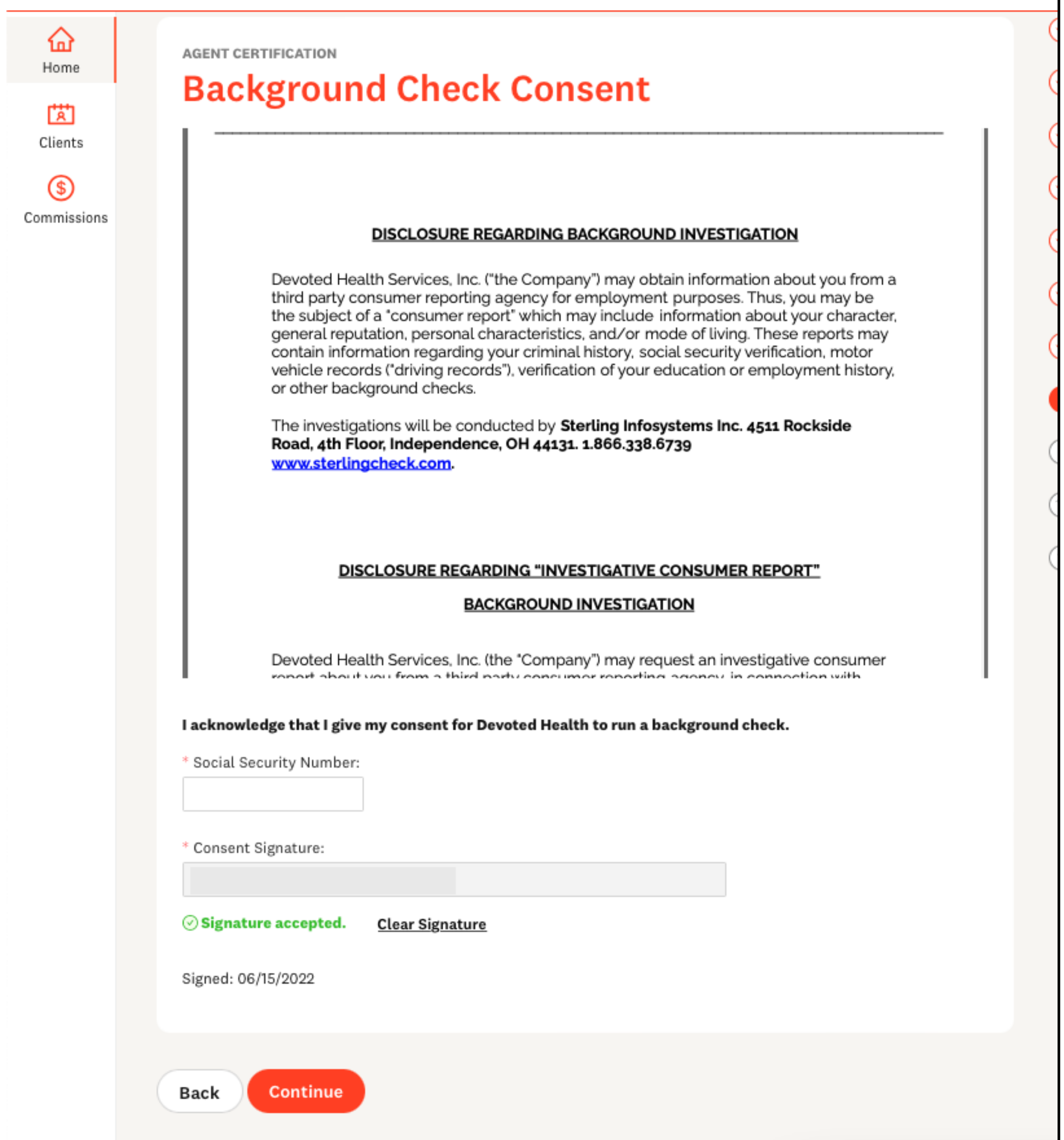
- The applicable agent agreement will be displayed, you can review or download a copy for your records. Once you have reviewed this information please select the acknowledgement button to ensure you can proceed to the next step.

</td></tr>
</table>

	
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

Devoted
HEALTH PLANS

agent-support@devoted.com
1-877-764-9446

Background Check Consent

DISCLOSURE REGARDING BACKGROUND INVESTIGATION

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

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

DISCLOSURE REGARDING "INVESTIGATIVE CONSUMER REPORT"

BACKGROUND INVESTIGATION

Devoted Health Services, Inc. (the "Company") may request an investigative consumer

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

* Social Security Number:

* Consent Signature:

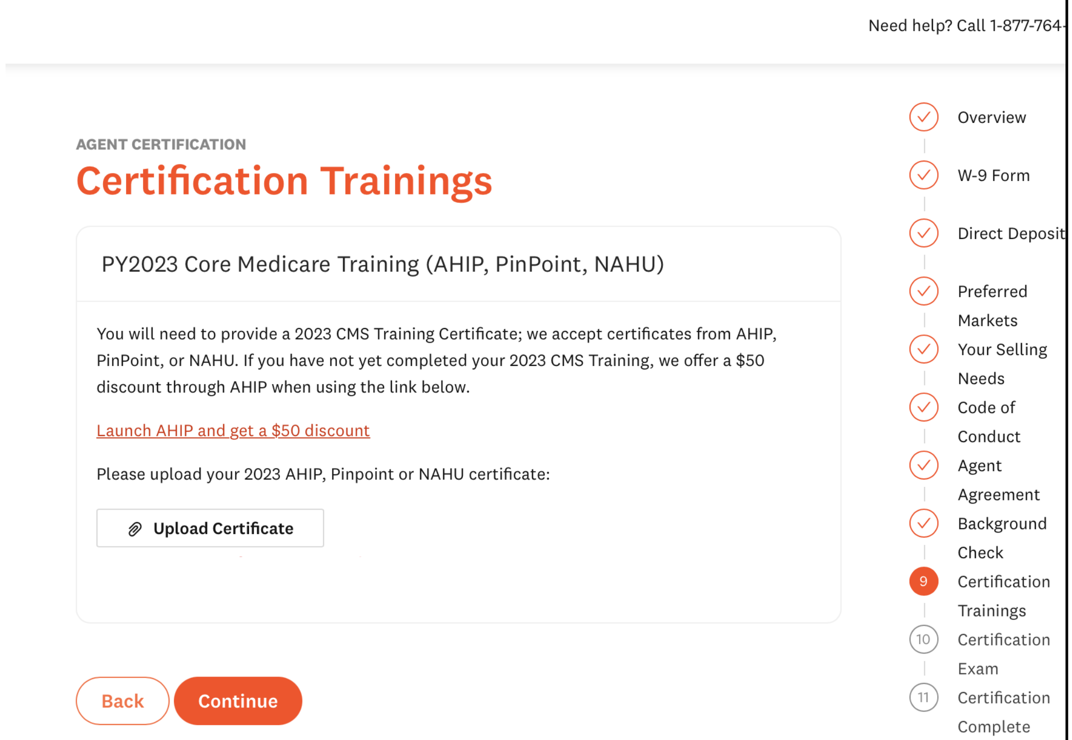
Signature accepted. Clear Signature

Signed: 06/15/2022

Back Continue

<table>
<tr>
<td>11) Certification Trainings - All users</td>
<td>

If you have a completed 2023 AHIP, PinPoint, or NAHU certificate you can upload a copy by selecting the upload certificate button.
You can complete the AHIP certificate by clicking the launch AHIP link - it will open up the AHIP site where you can get a $50 discount at checkout.



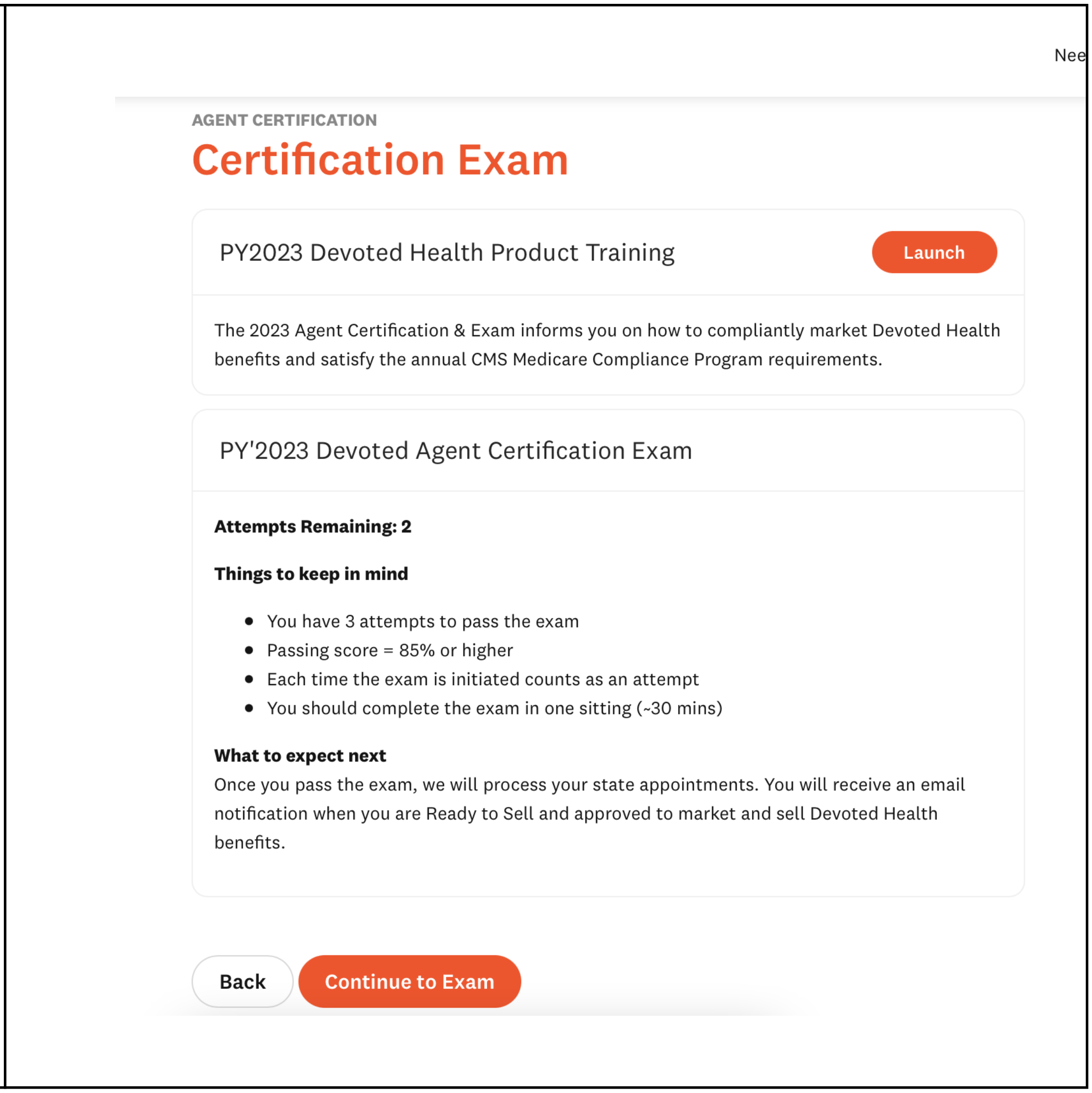
</td>
</tr>
<tr>
<td>11) Certification Exam - All users</td>
<td>

You will access our PY2023 Devoted Health Product Training by clicking the Launch button on the top of the page as seen below.

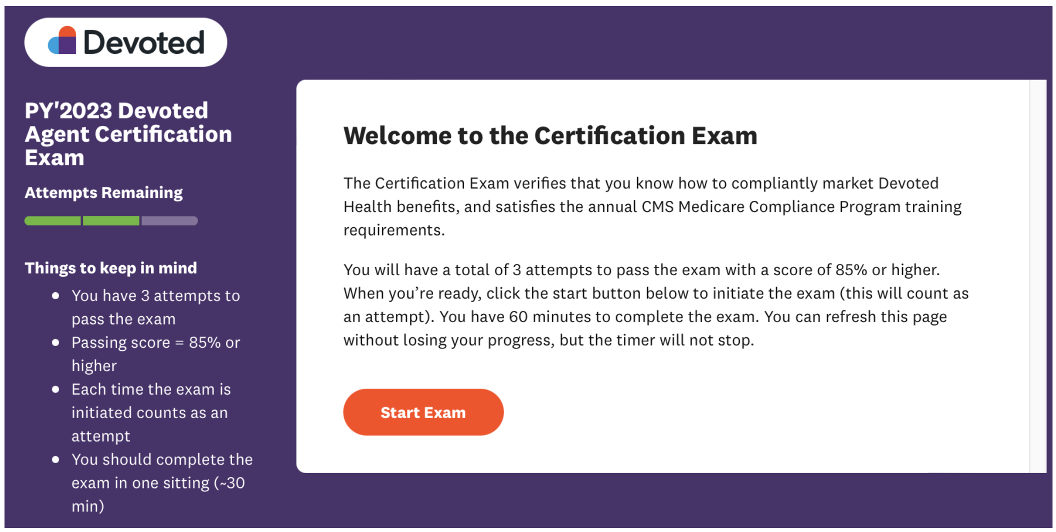
This will go through a presentation that will have an interactive experience and guide you through our product offerings, markets, and much more.

Once you have completed the training you will select the Continue to Exam button at the bottom of the page.

</td>
</tr>
</table>


Nee
AGENT CERTIFICATION
Certification Exam
PY2023 Devoted Health Product Training
Launch
The 2023 Agent Certification & Exam informs you on how to compliantly market Devoted Health benefits and satisfy the annual CMS Medicare Compliance Program requirements.
PY'2023 Devoted Agent Certification Exam
Attempts Remaining: 2
Things to keep in mind
You have 3 attempts to pass the exam
Passing score = 85% or higher
Each time the exam is initiated counts as an attempt
You should complete the exam in one sitting (~30 mins)
What to expect next
Once you pass the exam, we will process your state appointments. You will receive an email notification when you are Ready to Sell and approved to market and sell Devoted Health benefits.
Back
Continue to Exam

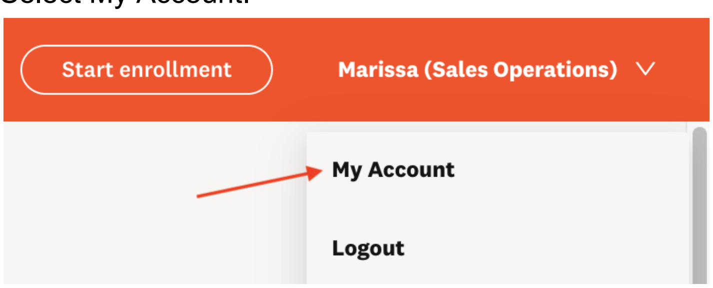
- This will open up this screen where the test will be completed.
  - You will have 3 attempts total and 1 hour per attempt. Once you start an exam you cannot exit and come back as it will count as an attempt.
  - All questions and answers will be randomized in each attempt



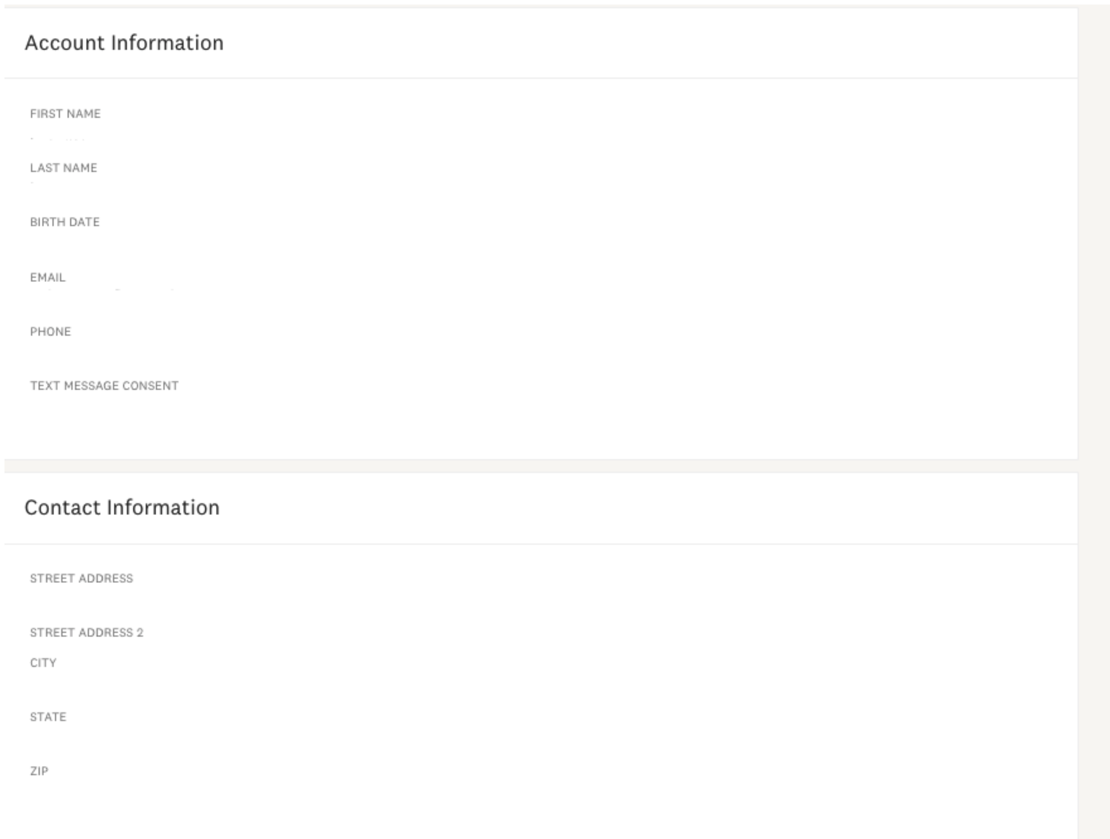
Verify and Update your Financial Information (Direct Payees only)

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

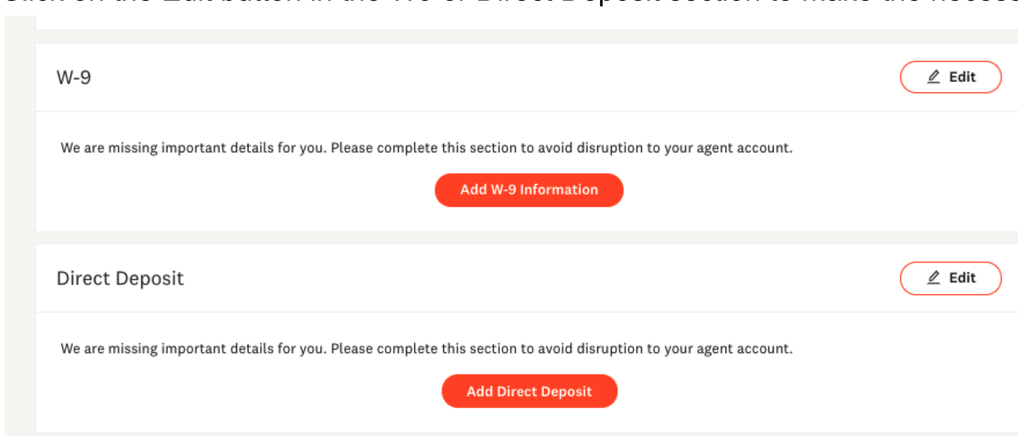
- Login to your Agent Portal account
  - If you need assistance with your username as password credentials please contact us.
- On the top right hand corner of the page you will see your name, select it and you will see a dropdown menu.
  - Select My Account.



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



- 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



Questions?

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