

Devoted Health Agent Portal Quick Start Guide

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The **Devoted Health Agent Portal** is built from the ground up to make selling Devoted quicker and easier!

The Basics

What's in it for you?

- The best online application experience for selling Devoted Health plans
- One place to view all your Devoted business and monthly commissions statements
- Links to essential tips, advice, and other resources for selling Devoted
- Digital signature workflows for Scope of Appointment and other forms
- Complete an HRA, request to host an event, identify and provide status updates on appointments assigned by Devoted Health
- Request Help through our ticketing system for Agent Support
- Complete your yearly onboarding and certification and receive your RTS status.

Plus, the portal will eventually become your one-stop shop for all agent activities. For those of you who sold with us in the past, the portal replaces Connecture and Evolve (your log-in will still work to access historical commission statements).

When can I access the Portal?

If you're **Ready to Sell** with Devoted, you'll use the same login details to login and get started.

How do I log in?

The first time you log in, look for an email in your account with the subject line of "Devoted Agent Portal Log-in Details". This email includes an invite link that you can click to create a password for your account. Your username is your NPN number.

After that, you can access the portal at any time by going to [Devoted Health](#) and entering your username and password.

Help! I forgot my password

Forgot your password? No problem! Just go to <https://agent.devoted.com/>, click Login, then click "Don't remember your password?" Enter your email and hit the "Send Email" button. You'll receive a message in your Email inbox with a link - click it to create a new password and sign into the portal.

What can I do in the portal?

As an individual agent, you can access the following tools within the Agent Portal:

- From the **Home Page**, you can check your Ready to Sell status and access important sales tools, training, support, and education resources.
- Send out a digital **Scope of Appointment** forms via email for Digital Signature.
- Quickly create and submit a new **Enrollment Application or HRA** online, whether you're in person with a prospective member or on the phone.
- Check the status of all your **Devoted Clients** in one place - including application tracking, enrollment status, member effective and end dates, and member IDs.
- Access your monthly **Commissions** statements, and download a PDF or spreadsheet. Commission statements are released by the end of each effective month (e.g. for 1/1 effectives you will receive commissions at the end of January).
- **Submit event requests** for any events you would like to host in partnership with us, it's as simple as submitting the information and we'll notify you once this has been approved.

As an agency admin, you can access these features in the Agent Portal:

- A downloadable summary of all your active downline agents, including NPN, RTS status by state and application activity, in the Agents page.
- Verify your agency's active state contracts.
- Monthly commissions statements for payments made directly to your agency in the Commissions tab.

Note: Each agency is provided one admin account. The username is the agency NPN, unless otherwise specified for your account, and the password is set when on the first login. Admin accounts are limited to read-only access in the Agent Portal, meaning that when you are logged in to the Admin account you cannot create or edit applications.

Check back often to see what features we add in the future - we'll be updating and improving your portal experience frequently!

Tips and Tricks

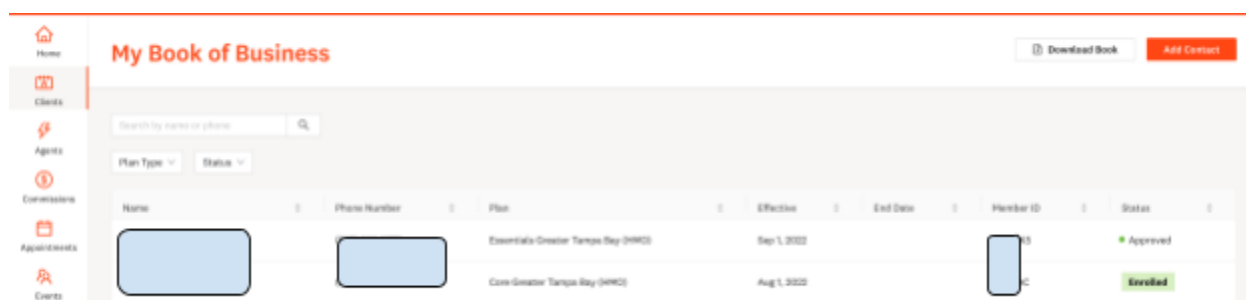
Managing Your Clients

You can quickly see all of your Devoted clients from the Clients page. This list will show the client name, phone number, plan, effective date, end date (if applicable), member ID and status.

- **Sorting the list.** You can sort the table by clicking on the triangles to the right of the column name. Only columns with the triangles are sortable. Click the triangles once to sort in ascending (A→Z) order, or click twice to sort in descending order (Z→A).

- **Filtering the list.** You can filter the list by Status and Plan Type using the dropdowns below the search box. Check off all of the options you want included in your results, then click the orange “Apply” button. Click the “Clear” link in the dropdown to clear the filter selections.
- **Searching the list.** You can search by name or phone number using the search box at the top of the page. Type your search term in the box, then click the magnifying glass button to the right of the box. To clear your search, delete the search terms and click the magnifying glass button.

Note: The Client page shows a list of *applications*. If a client has multiple applications, each application will appear as a separate row in the list.



Name	Phone Number	Plan	Effective	End Date	Member ID	Status
[Redacted]	[Redacted]	Essentials Greater Tampa Bay (HMO)	Sep 1, 2022		[Redacted]	Approved
[Redacted]	[Redacted]	Core Greater Tampa Bay (HMO)	Aug 1, 2022		[Redacted]	Enrolled

Understanding Client Statuses

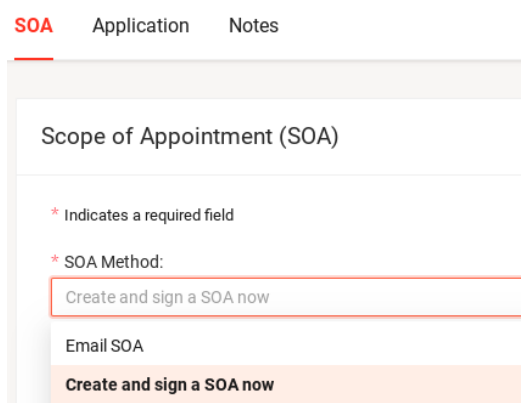
There are 9 client statuses in the Portal (hover your mouse over the status in the Portal to view definition; if you’re on a tablet you can click the status):

- **Draft:** The application has been started but has not yet been submitted to Devoted Health. You may continue to edit the application.
- **In Review:** The application has been received by Devoted Health and is being reviewed for eligibility.
- **Submitted:** The application has been received by CMS.
- **Withdrawn:** The application has been canceled prior to being submitted to CMS.
- **Approved:** The application has been approved by CMS and the member’s effective date is in the future.
- **Denied:** The application has been denied by CMS.
- **Canceled:** The application was approved by CMS, but the member canceled enrollment prior to the effective date.
- **Enrolled:** The member is currently enrolled.
- **Disenrolled:** The member is currently disenrolled.

Submitting an Electronic Scope of Appointment (SOA)

Scope of appointments can be completed electronically, over the phone, by paper, or through email. Please view our [Video on Scope of appointment tool](#) for more details. To complete an electronic SOA, please follow these simple steps:

- First enter some information about the prospect to start a profile if not already created.
- Toggle to the SOA tab and choose “Create and sign a SOA now” in dropdown



The screenshot shows a web interface with three tabs: "SOA" (highlighted in red), "Application", and "Notes". Below the tabs is a form titled "Scope of Appointment (SOA)". A legend indicates that an asterisk (*) denotes a required field. The "SOA Method:" dropdown menu is open, showing three options: "Create and sign a SOA now" (highlighted with a red border), "Email SOA", and "Create and sign a SOA now" (highlighted in orange).

- Click the “Create SOA” button. **Note:** The SOA will open in a new tab
- Prospect must review and sign SOA
- You will fill in the remaining required fields and submit SOA.
- Note: The submit button will not appear until all required fields are completed.

Creating an Application

You can quickly create an Application from Portal by clicking the “Start enrollment” button in the orange header at the top of the page. Once you’ve filled out the **Create Contact** page, click the orange “Start Application” button to complete the enrollment application.

Choosing a Plan

On the **Plan** page of the Application, enter the plan year and applicant’s zip code to quickly filter down the list of Plans to quickly help you choose the correct one.

Selecting a PCP

On the **Providers** page of the Application, you can select the preferred PCP for an applicant. A few tips:

- Use the [PCP Search tool](#) on devoted.com to quickly find the best PCP for your applicant.
- Copy the PCP’s NPI number from the **PCP Search tool** into the PCP field on the **Providers** page of the application, then choose the relevant office location.

- If the applicant does not have a PCP preference, click the checkbox that says “If applicant has no PCP preference, check this box and a Devoted guide will help assign one.”
- *Note: if you do not select a PCP, you must click the checkbox above to proceed through the application.*

Application Signatures

On the **Sign & Submit** page, you have a number of options for documenting the applicant's signature depending on the submission method.

- *In Person Electronic*: Click the "Sign Application" button to open an Application Signature form - show this form to the applicant on your device and ask them to complete the form and sign themselves.
- *Phone, Unrecorded Line*: The applicant will need to complete a telephonic signature with Devoted; you can read the prompt displayed on the Enrollee Signature section of the page. Inform the beneficiary that because this is an unrecorded conversation, they will need to complete this step over the phone on a recorded line. Someone from Devoted Health will call them within the next 2 business days. That call will count as their verbal "signature."
- *Phone, Recorded Line*: If you're on a recorded line, you can read the content displayed in the Enrollee Signature section on the page and ask them for a verbal signature. Your call recording is proof of the applicant's signature.

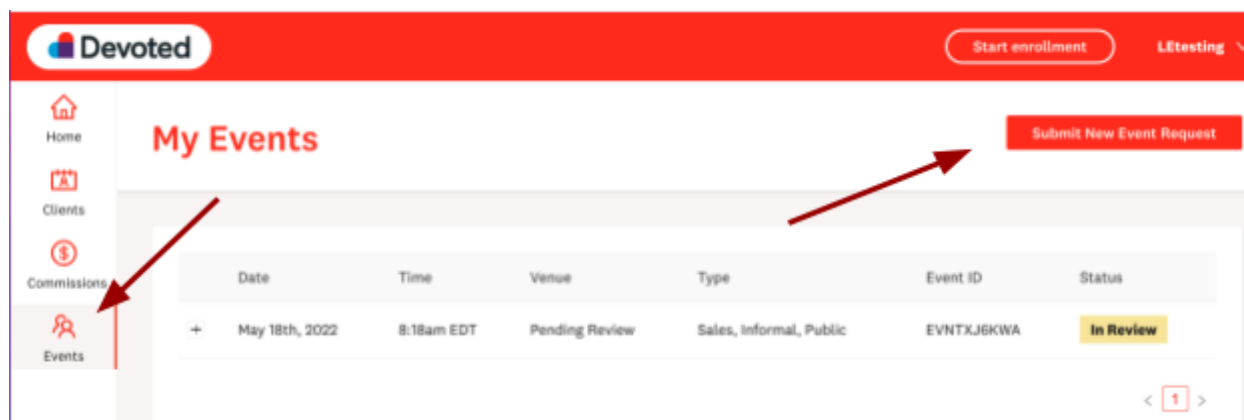
Other Application Tips

- You can add multiple Enrollment Reasons on the **Health & Financials** page
- If the applicant has more than one Enrollment Reason, you can indicate the preferred Enrollment Period via the Preferred Enrollment Period dropdown on the **Application Details** page.
- The Proposed Start Date on the **Application Details** page indicates the preferred Enrollment Date of the applicant. The final Effective Date will be determined when the application is accepted by CMS.
- You can upload supporting documentation and forms via the Add File Attachment button on the **Application Details** page.
- Use the Transition Details field on the **Sign & Submit** page to let us know about any information you think will be helpful for the applicant's member onboarding.

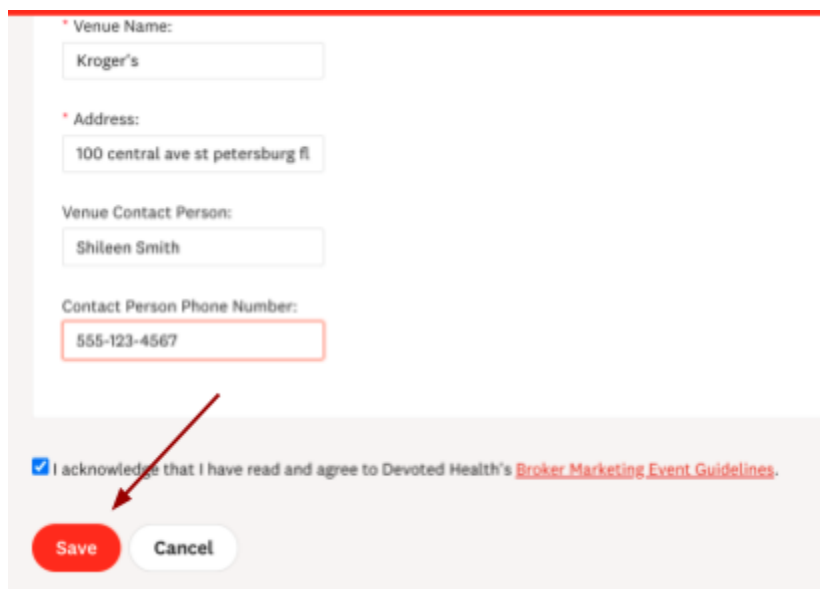
New Feature! Agent Event Submission

Want to host an event with Devoted Health or represent Devoted Health at one of your events? Simply follow these easy steps:

- Once logged into your account, navigate to the Events button on the left side menu. Select **Submit New Event Request** on the top right.



- Enter the event information. Items with a red asterisk are required; however the more information the better. Here are a few items to know about selecting the event items:
 - If you are hosting the event in conjunction with a provider or at a provider's office be sure to select that it is a provider event.
 - Here are the differences between informal and formal:
 - Formal Marketing Event - Are typically structured in an audience/presenter style with an agent/broker formally providing specific Plan/Part D Sponsor information via a presentation on the products being offered. Example: Seminar.
 - Informal Marketing Event - Are conducted with a less structured presentation or in a less formal environment. They typically utilize a table, kiosk that is manned by an agent/broker who can discuss the merits of the plan's products. Example: Tabletop.
 - Here are the differences between sales and educational:
 - Educational Event - Educational events are designed to inform beneficiaries about Medicare Advantage, Prescription Drugs or other Medicare Programs and does not include marketing.
 - Marketing/Sales Events are designed to steer or attempt to steer potential enrollees, or the retention of current enrollees, toward a plan or limited set of plans.
 - Once you have filled out all the information related to the event and read and agreed to our broker marketing event guidelines which are found in our broker manual under "Devoted Health Educational and Sales Event", the option will appear to "save" the event.



* Venue Name:
Kroger's

* Address:
100 central ave st petersburg fl

Venue Contact Person:
Shileen Smith

Contact Person Phone Number:
555-123-4567

I acknowledge that I have read and agree to Devoted Health's [Broker Marketing Event Guidelines](#).

Save Cancel

What happens next?

The information will go to our local market contacts who will review the information and contact you with any questions. You can watch the progress of your event under the **events tab**.

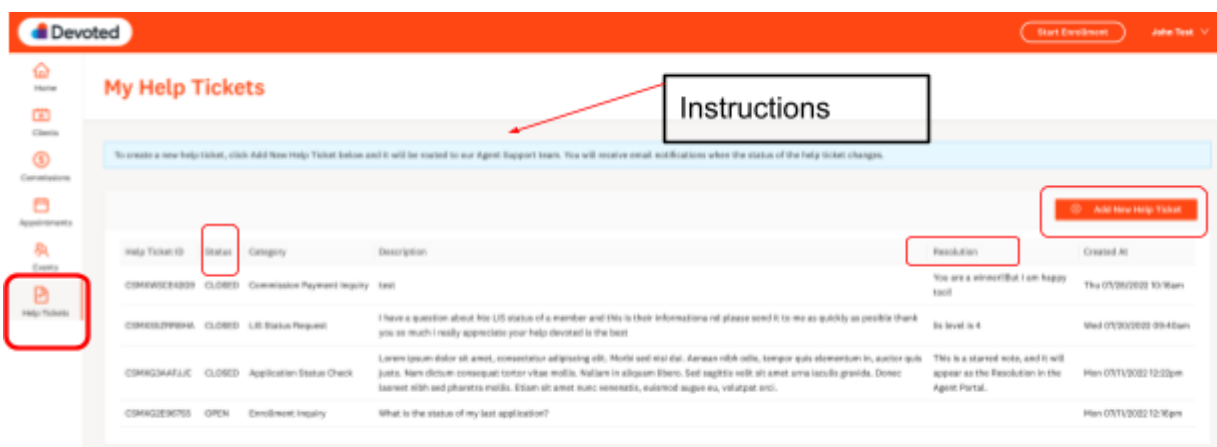
- When first submitted it will sit in “Review” status
- If the event is approved it will move to “Approved”
- If the event is canceled it will move to “Canceled”

Once submitted you will be able to see your event in your portal and as the event moved to either approved or canceled you will receive an email notification. If you need to make a change to your event (i.e. date/time/location) please reach out directly to your local market contacts.

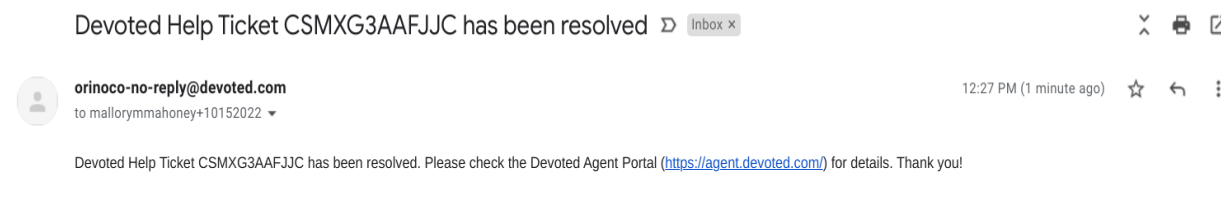
New Feature! Request help through our agent support ticketing system

Need help? Getting a response to your questions is easy, simply submit a help ticket in your portal directly to our Agent Support team and we will follow within 48 business hours.

- On your home page navigate to the Help Tickets on the left hand side.



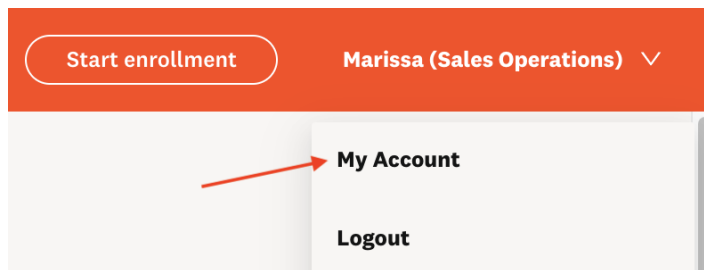
- Select the Category of your item and add a description.
- Hit “Add” to submit your ticket.
- Receive a Help Ticket ID as a confirmation, you can track the progress of your ticket within your portal. You will receive email notifications when the status of the help ticket changes.
- An email notification will be sent once your ticket has been resolved.



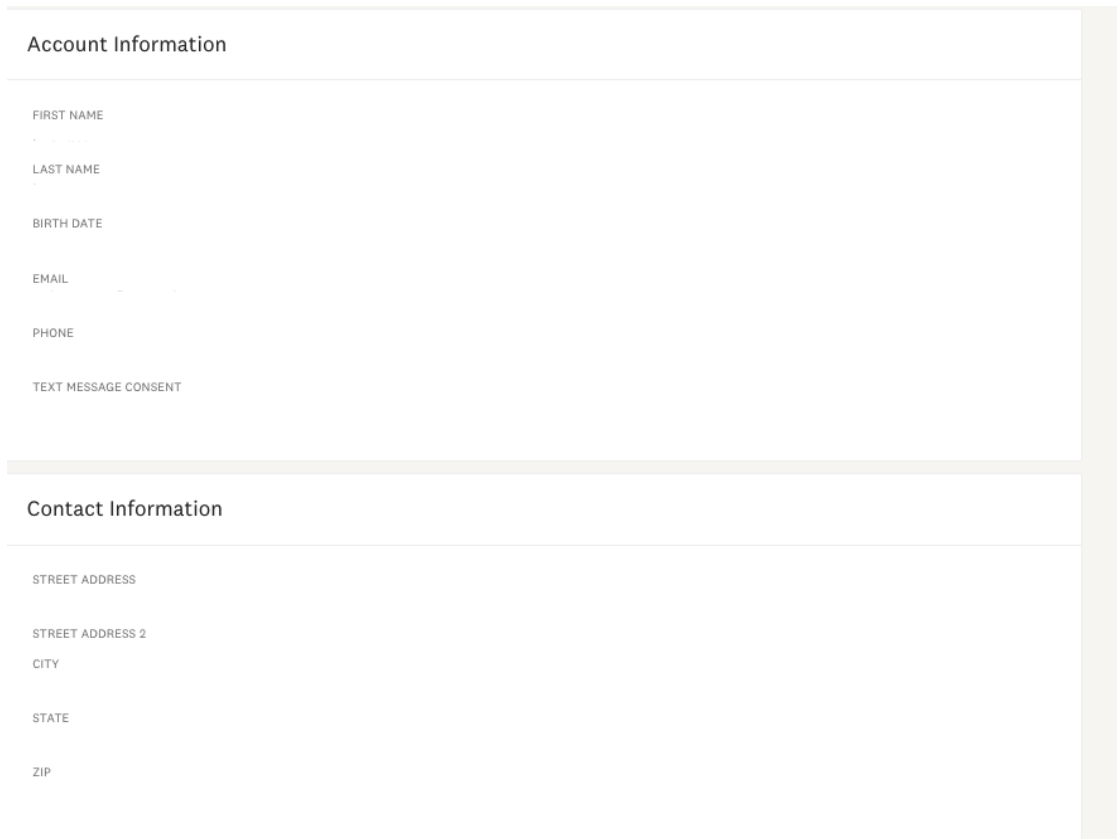
Verify and Update your Financial Information (Direct Payees only)

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:

A screenshot of a user profile page. It is divided into two main sections. The first section is titled "Account Information" and contains several input fields: "FIRST NAME", "LAST NAME", "BIRTH DATE", "EMAIL", "PHONE", and "TEXT MESSAGE CONSENT". The second section is titled "Contact Information" and contains several input fields: "STREET ADDRESS", "STREET ADDRESS 2", "CITY", "STATE", and "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	