EvolveNXT Agency Administration Guide 2023

Contents

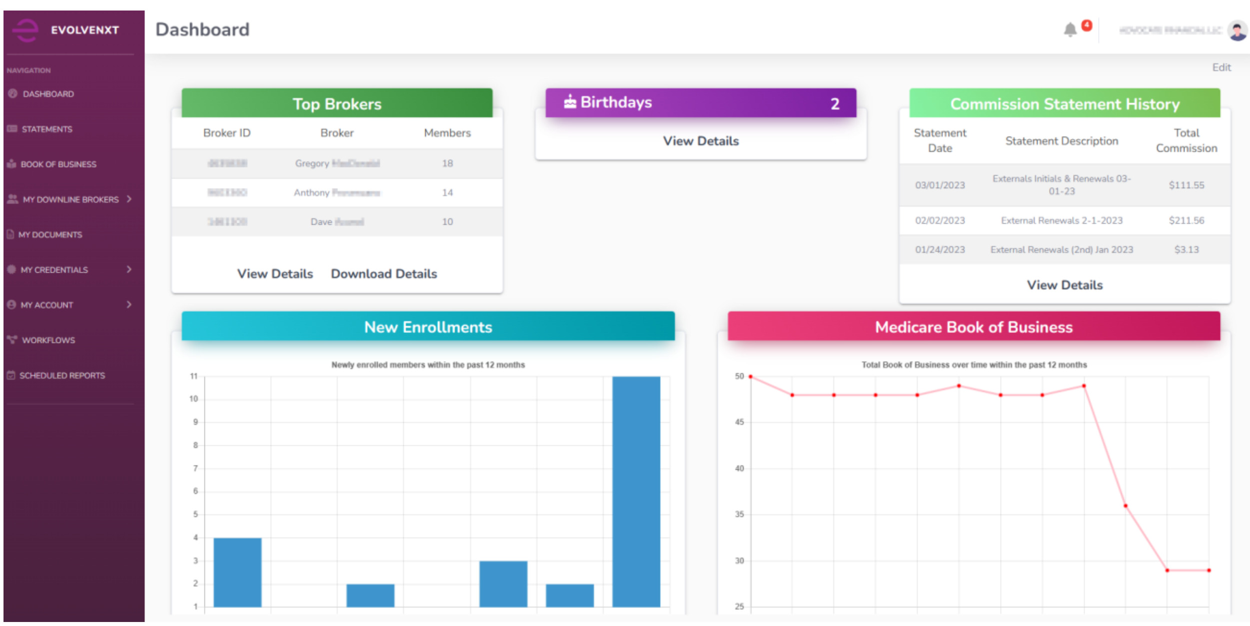
EvolveNXT Agency Portal: Dashboard

Agency Portal

The Agency Portal displays all the information about the agency's downline brokers, providing accurate, current data on membership enrollment. Additionally, agencies can also use the portal for managing communications between the carrier and the brokers. All of the items in the portal are accessible through the left side menu, but you may configure commonly used analytics and shortcuts as widgets in the dashboard.

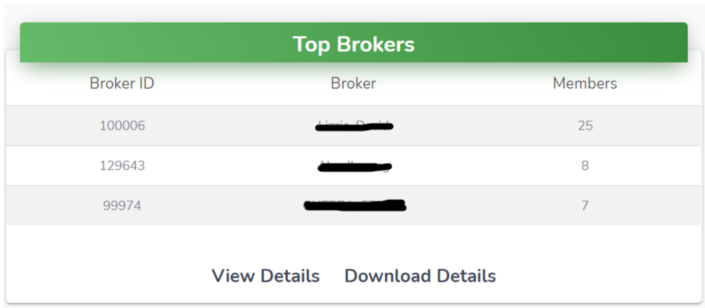
1 Dashboard

When you log into the Portal, you are directed straight to your dashboard. Some of the more popular widgets used by health plans are shown in the screenshot below:

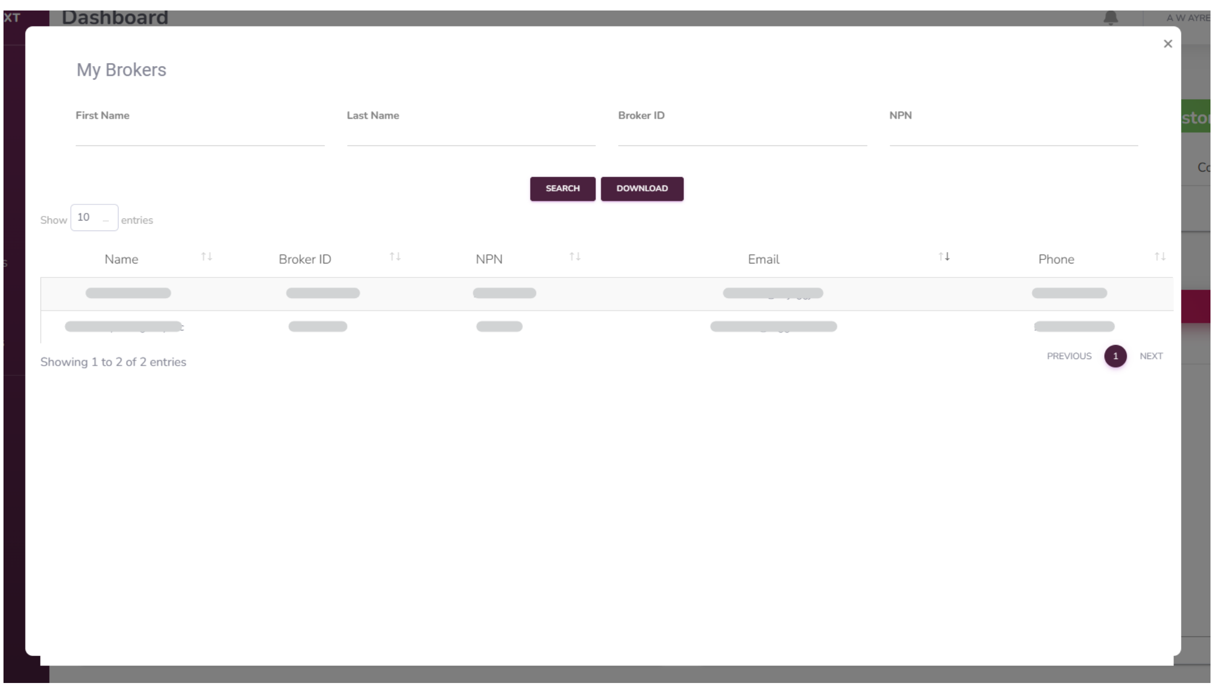


1.1 (Sample) Individual Widget Descriptions:

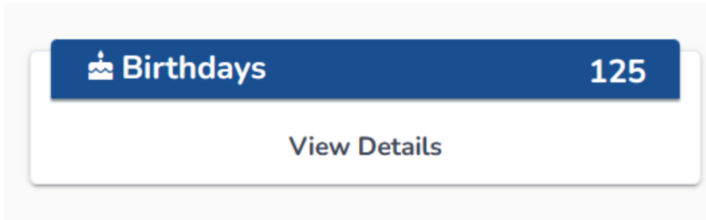
1.1.1 Top Brokers



Gives you a list of all the agency’s top performing brokers. Clicking on “View Details” takes you to the following screen, which can also be downloaded as an Excel spreadsheet:



1.1.2 Birthdays



This widget can be configured to show brokers with upcoming birthdays

1.1.3 Commission Statement History

Commission Statement History

Statement Date	Statement Description	Total Commission
02/13/2023	[redacted] Statements	($50.00)
02/09/2023	[redacted] February Statements	$26,603.49
01/04/2023	[redacted] January Statements	$70,913.95

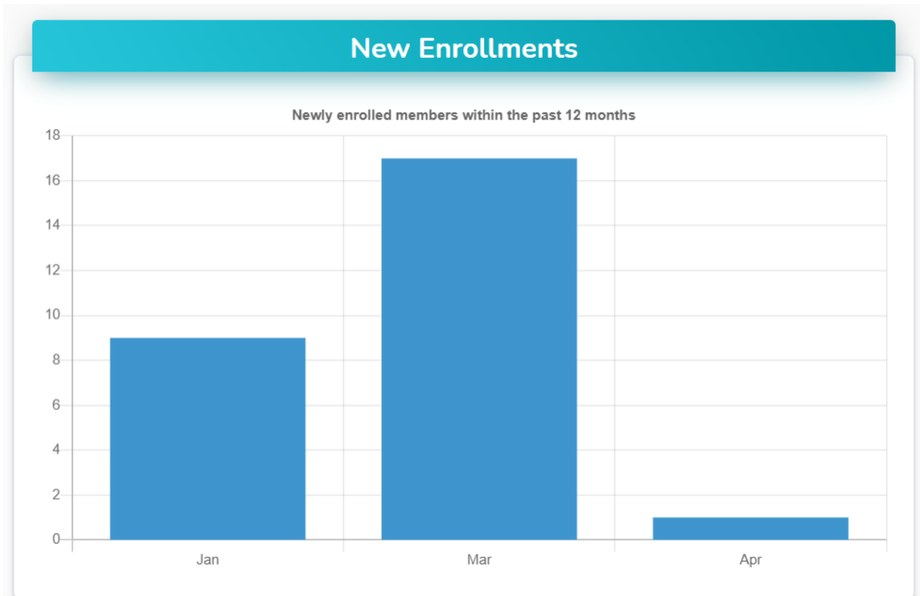
View Details

Displays the most recent statements in the dashboard, clicking on "View Details" will take you to the following screen. (Also accessible from "Statements" tab in the left-hand menu)

Commission Statement History

	Statement Number	Statement Date	Payee	Transactions	Credits	Debits	Balance	Amount	Check Date	Amount Paid
View	39	06/27/2022	[redacted]	2,165	$9,358.50	$-300.00	$0.00	$9,058.50		0.00
View	1295	07/15/2022	[redacted]	2,851	$13,089.58	$0.00	$0.00	$13,089.58		0.00
View	90438	08/10/2022	[redacted]	3,249	$12,037.67	$-2,464.58	$0.00	$9,573.08		0.00
View	90638	09/01/2022	[redacted]	3,220	$12,750.75	$-1,658.33	$0.00	$11,092.42		0.00
View	90962	10/01/2022	[redacted]	2,097	$10,515.42	$-1,062.50	$0.00	$9,452.92		0.00
View	91061	11/01/2022	[redacted]	5,805	$19,000.58	$-1,554.35	$0.00	$17,446.23		0.00
View	91326	12/04/2022	[redacted]	10,008	$25,725.83	$-1,693.75	$0.00	$24,032.08		0.00
View	91714	01/04/2023	[redacted]	23,608	$79,878.53	$-8,964.58	$0.00	$70,913.95		0.00
View	93265	02/09/2023	[redacted]	6,035	$27,724.34	$-1,120.85	$0.00	$26,603.49		0.00
View	93648	02/13/2023	[redacted]	2	$0.00	$-50.00	$0.00	$-50.00		0.00

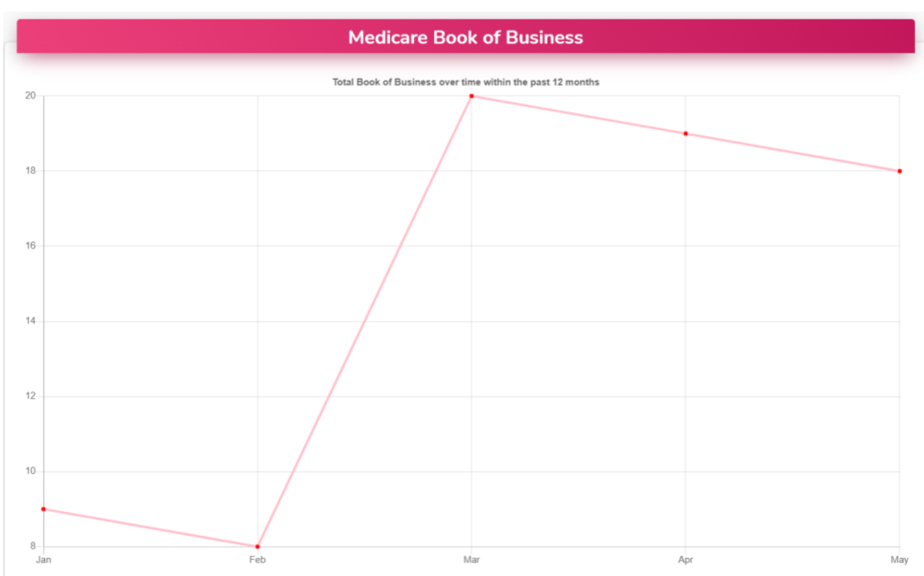
1.1.4 New Enrollments



Displays new enrollments over the past year

1.1.5 Medicare Book of Business

View total book of business within the last 12 months.



EvolveNXT Agency Portal: Side Navigation Menu

Side Navigation Menu

From the left-hand Navigation Menu, agencies can view statements, search enrollments in your book of business, onboard brokers, access documents & resources, view the agency credentials.

Lastly, you can view that your onboarding case was approved and start your recertification when applicable under Onboarding.

2 Statements

If you are either Direct or Downline Only, you will receive statement information in your portal. Once a statement is published, a new row with all details pertaining to that specific payment will be displayed. The Statement Date (Stmt Date) corresponds with the payment date.

NOTE: If you are receiving or have received payment via paper check, you will have an additional field, “Chk#”

Commission Statement History

	Statement Number	Statement Date	Payee	Transactions	Credits	Debits	Balance	Amount	Check Date	Amount Paid
View	39	06/27/2022	[illegible]	2,165	$9,358.50	$-300.00	$0.00	$9,058.50		0.00
View	1295	07/15/2022	[illegible]	2,851	$13,089.58	$0.00	$0.00	$13,089.58		0.00
View	90438	08/10/2022	[illegible]	3,249	$12,037.67	$-2,464.58	$0.00	$9,573.08		0.00
View	90638	09/01/2022	[illegible]	3,220	$12,750.75	$-1,658.33	$0.00	$11,092.42		0.00
View	90962	10/01/2022	[illegible]	2,097	$10,515.42	$-1,062.50	$0.00	$9,452.92		0.00
View	91061	11/01/2022	[illegible]	5,805	$19,000.58	$-1,554.35	$0.00	$17,446.23		0.00
View	91326	12/04/2022	[illegible]	10,008	$25,725.83	$-1,693.75	$0.00	$24,032.08		0.00
View	91714	01/04/2023	[illegible]	23,608	$79,878.53	$-8,964.58	$0.00	$70,913.95		0.00
View	93265	02/09/2023	[illegible]	6,035	$27,724.34	$-1,120.85	$0.00	$26,603.49		0.00
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View	91326	12/04/2022	[illegible]	10,008	$25,725.83	$-1,693.75	$0.00	$24,032.08		0.00
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View	93648	02/13/2023	[illegible]	2	$0.00	$-50.00	$0.00	$-50.00		0.00

If you are receiving ACH payments, you will be able to track payment status via the "Pmt Status" Column, there are four potential statuses:

1. Payment Sent – this means the payment file has been sent to the bank. Payment will remain in this status for up to two weeks, pending any return files.
2. Payment Confirmed – this means there were no return files from the bank, payment is considered deposited.
3. Returned – [with Return Reason] – This means the bank has sent the payment back to Zing! and you are required to update your ACH information to receive payment. You will receive an email and portal notification every time you have a returned payment. Some examples of Return Reasons are: 'Invalid Account Number', 'Invalid Routing Number', or 'Account Closed'
4. Payment Resent – This means you have updated your ACH information via your portal and the payment file has been resent to the bank for payment.

Resent payments are processed every Friday for payment the following Friday. Expect to receive your payment two weeks after you have made your ACH updates

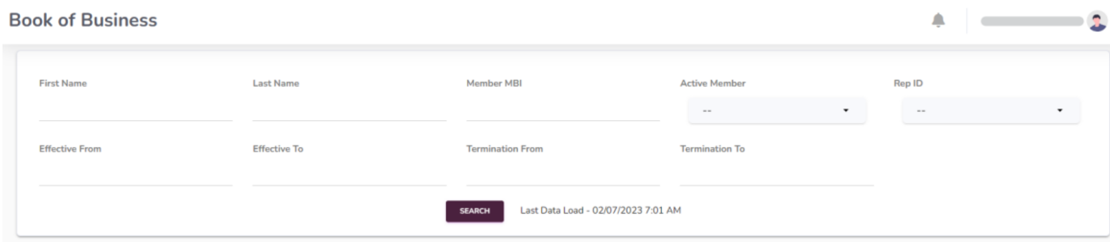
By clicking "View" to the left of a Statement for a given date, you will be able to see the details of the members that were paid out and download a PDF or Excel of the statement in the top left corner

3 Book of Business

The Book of Business tab will display all members where you are the broker of record.

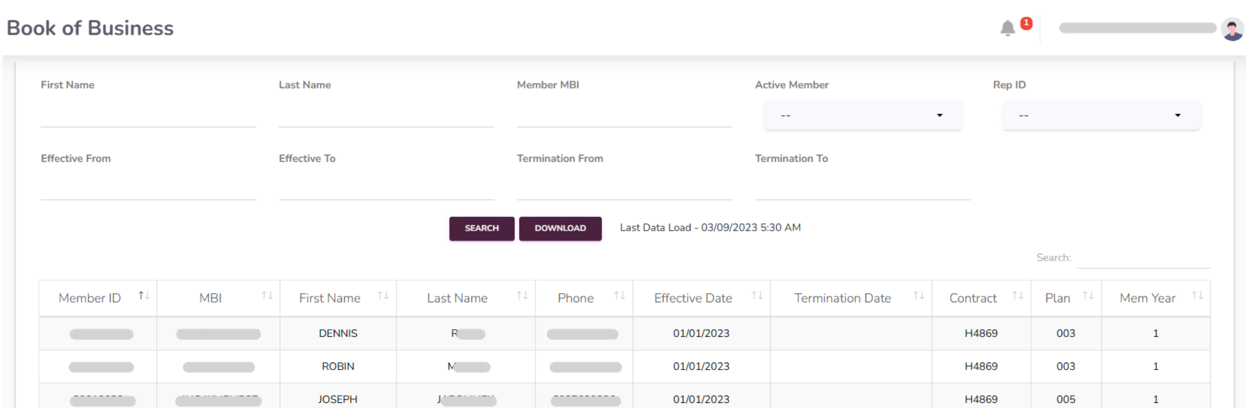
Enter one of the below filters to look for a specific member, or search for members by category. Once the search criteria is entered, select 'Search' to generate results. Select 'Download' at any time to export your Book of Business into Excel.

Search Screen:



Once you select the 'Search' button, the member information related to the search criteria will be displayed. From the screen below you can navigate through the list of members or download to CSV file for additional member information. You can also use the open text 'Search' at the top right to search among search results, Book of Business download provides additional information about your members,

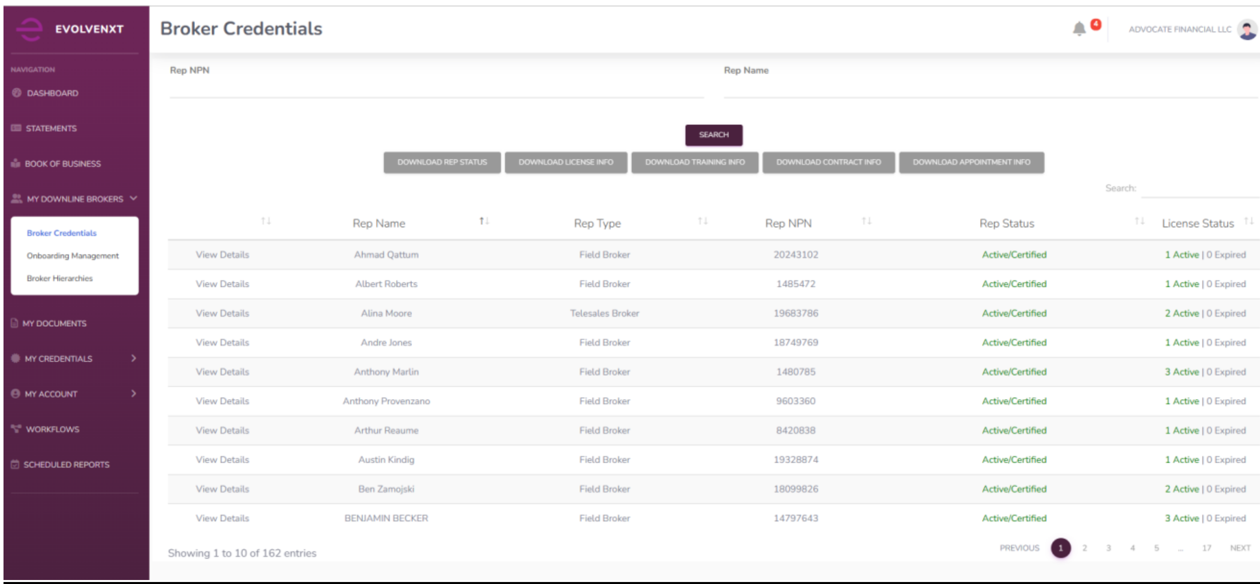
Search Results Screen:



4 My Downline Brokers

This tab covers three critical functions for the agency: tracking downline agents' ready-to-sell status, onboarding new brokers, and managing broker hierarchies based on broker sub types.

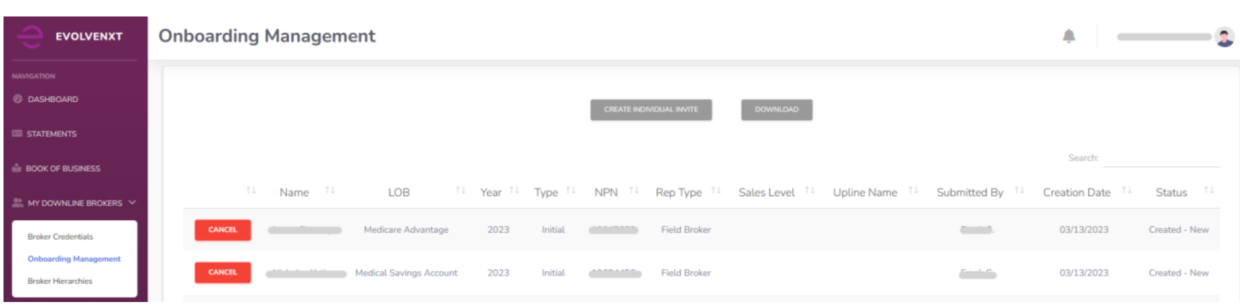
4.1 Broker Credentials



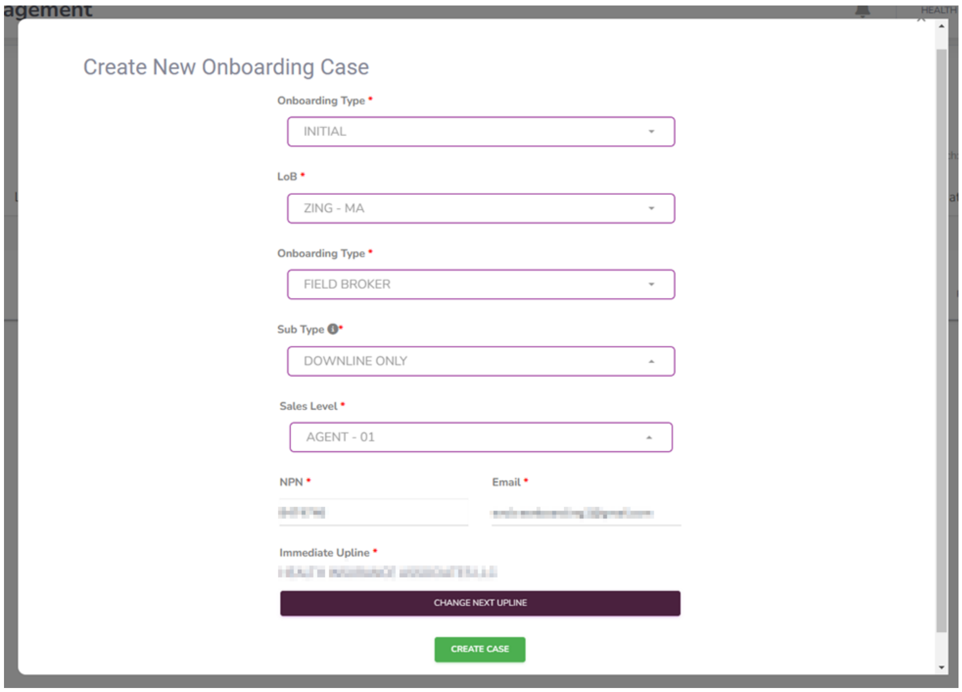
4.2 Onboarding Management

4.2.1 AGENCY PORTAL STEPS-Create Individual Invite

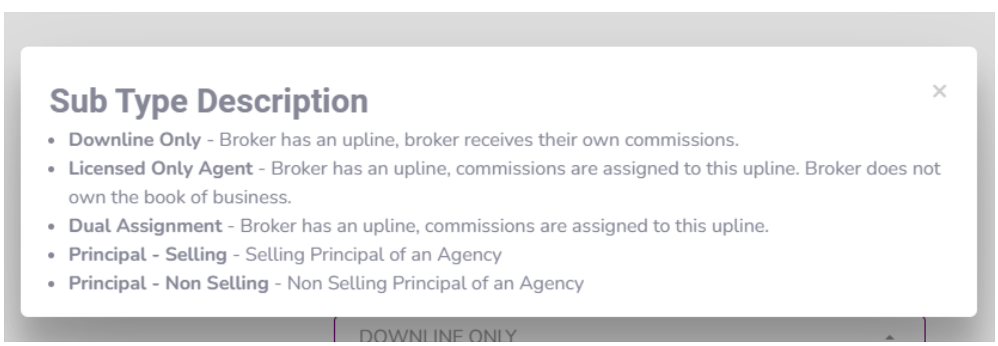
In the left-hand navigation pane, go to 'Onboarding Management' then, click on 'Create Individual Invite' to begin the onboarding process. You can also click on the 'Download' button to download a csv list of brokers in the onboarding queue:



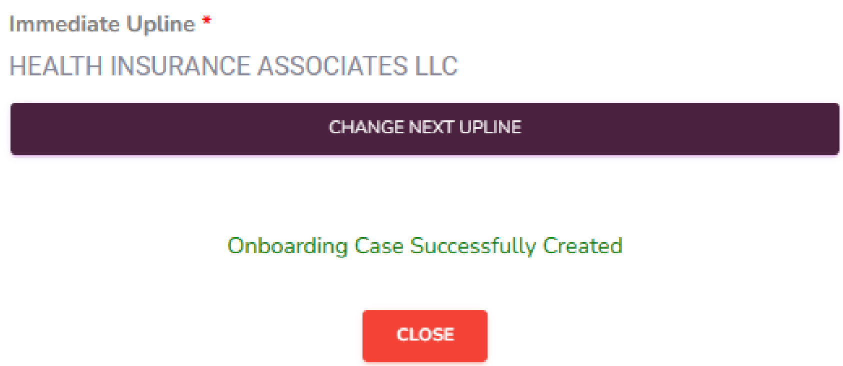
Fill out NPN and unique email address (*A brief description of each of the Agency Sub-Types can be found by clicking on the "I")*:



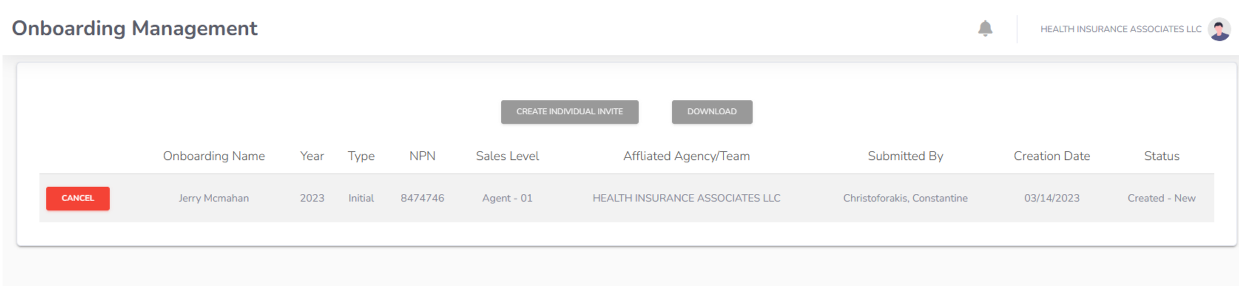
Detail of guide to sub types:



After clicking on 'Create Case' at the bottom of the form, you will receive the following confirmation:

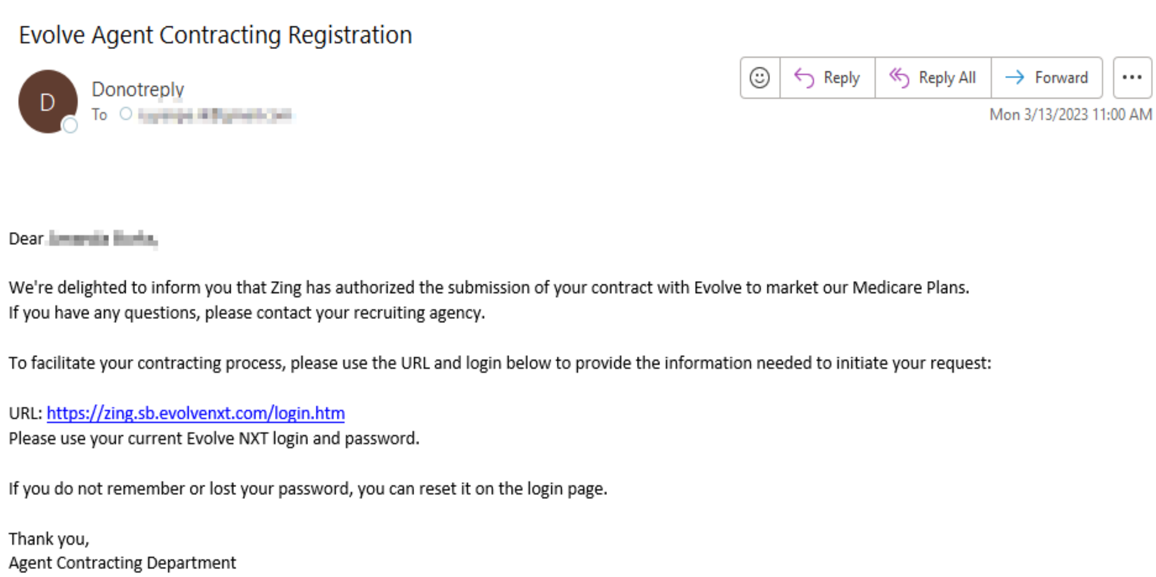


The case will also appear in the 'Onboarding Management' Dashboard:



	Onboarding Name	Year	Type	NPN	Sales Level	Affliated Agency/Team	Submitted By	Creation Date	Status
CANCEL	Jerry Mcmahan	2023	Initial	8474746	Agent - 01	HEALTH INSURANCE ASSOCIATES LLC	Christoforakis, Constantine	03/14/2023	Created - New

In the last admin step, an email is sent to the prospective agency- the email will look like this:



Evolve Agent Contracting Registration

Donotreply
To [redacted]

Reply Reply All Forward

Mon 3/13/2023 11:00 AM

Dear [redacted],

We're delighted to inform you that Zing has authorized the submission of your contract with Evolve to market our Medicare Plans.
If you have any questions, please contact your recruiting agency.

To facilitate your contracting process, please use the URL and login below to provide the information needed to initiate your request:

URL: https://zing.sb.evolvenxt.com/login.htm
Please use your current Evolve NXT login and password.

If you do not remember or lost your password, you can reset it on the login page.

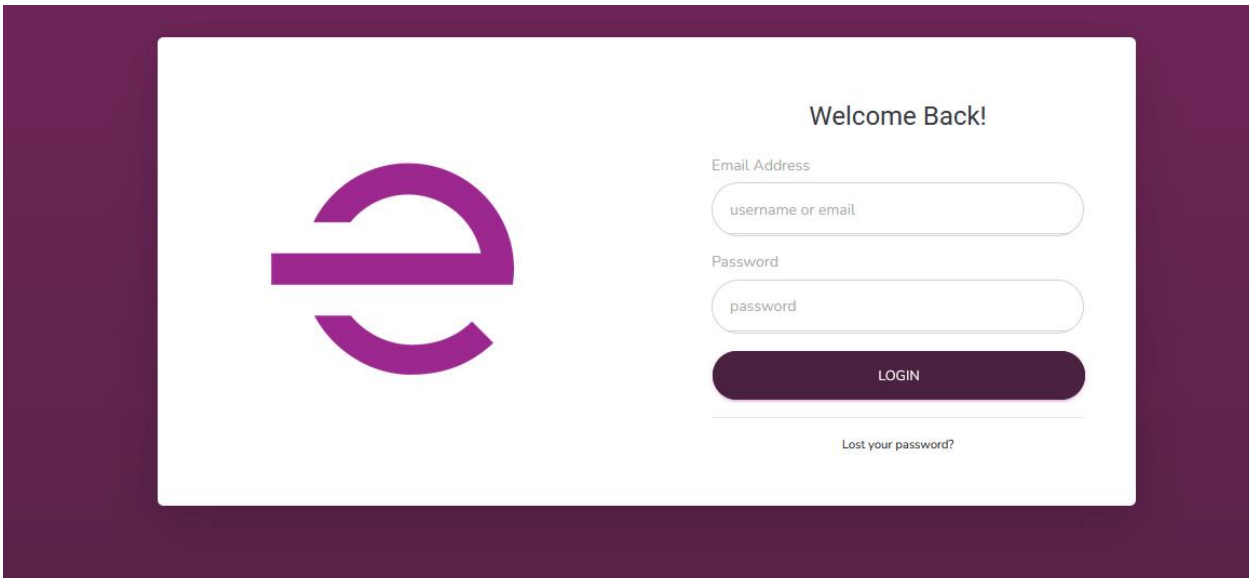
Thank you,
Agent Contracting Department

Zing HEALTH™

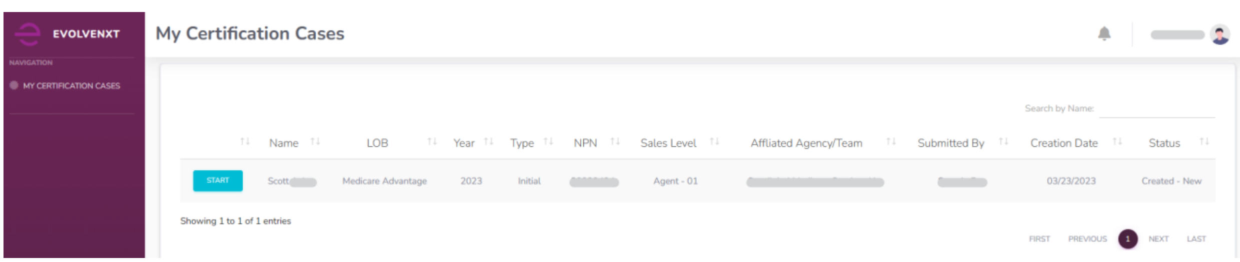
evolveNXT
Incentivize, Inspire, Grow

4.2.2 Agency Onboarding-Broker Steps

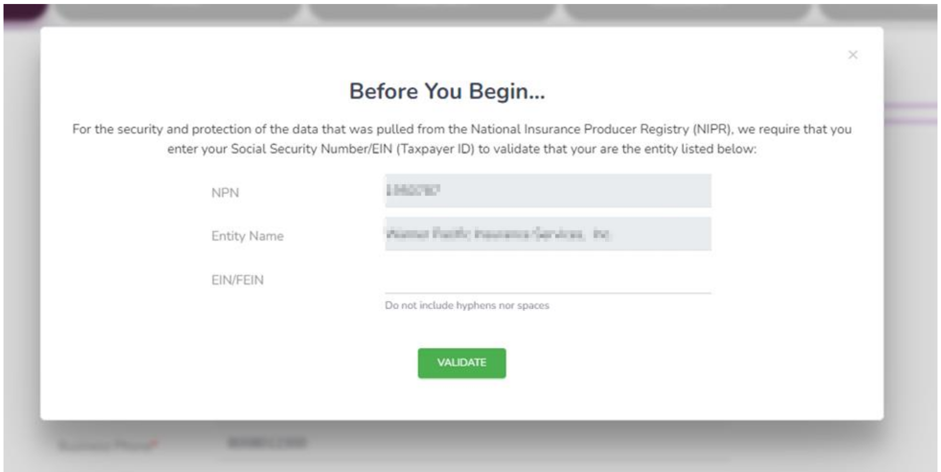
You will then navigate to the site with the credentials in the email:



Once logged in, the broker will be able to onboard by clicking the "Start" button.



Prior to starting the onboarding process, the agency will be prompted to provide a tax ID number.



If this NPN+ tax ID combination is incorrect, you will receive an error message stating the following:

"If your NPN and SSN do not match, please contact a Zing Administrator __________"

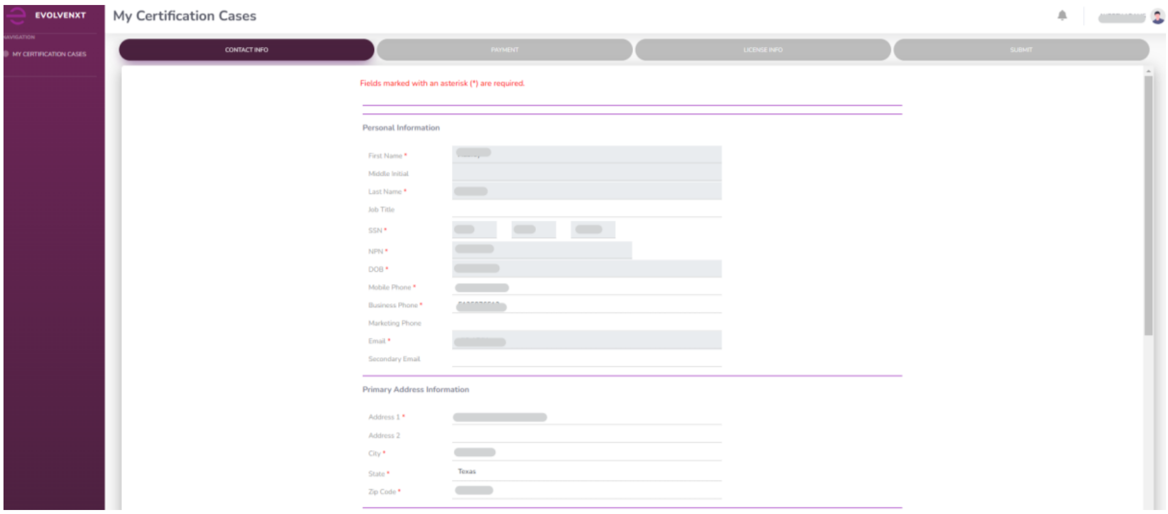
Other possible error messages include:

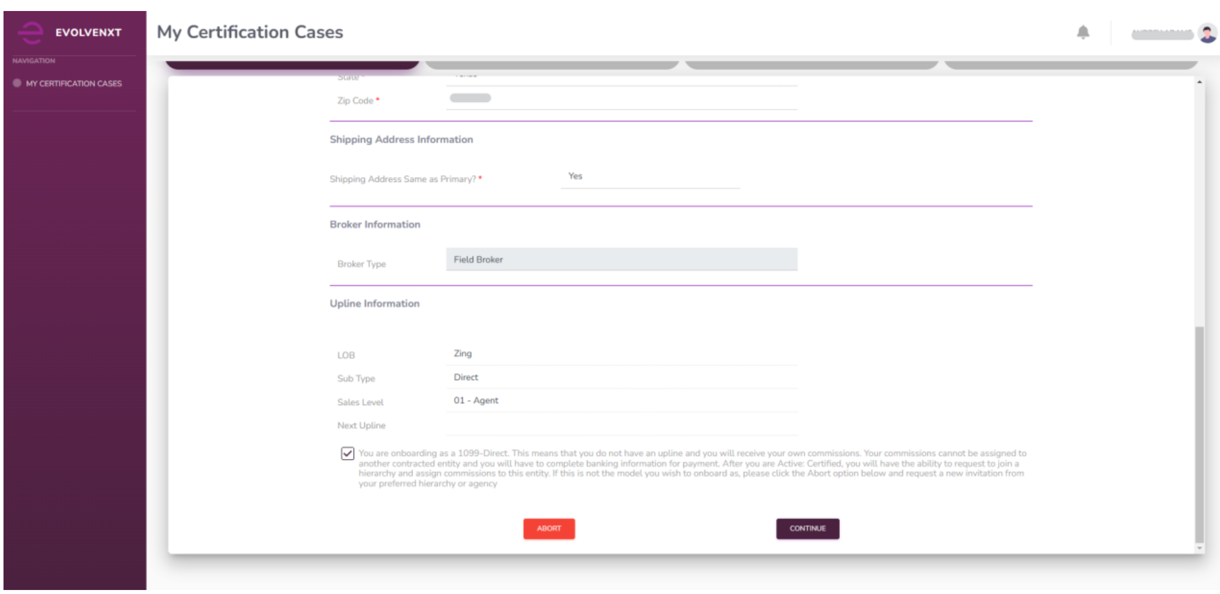
NIPR related error

No Resident Licenses Found

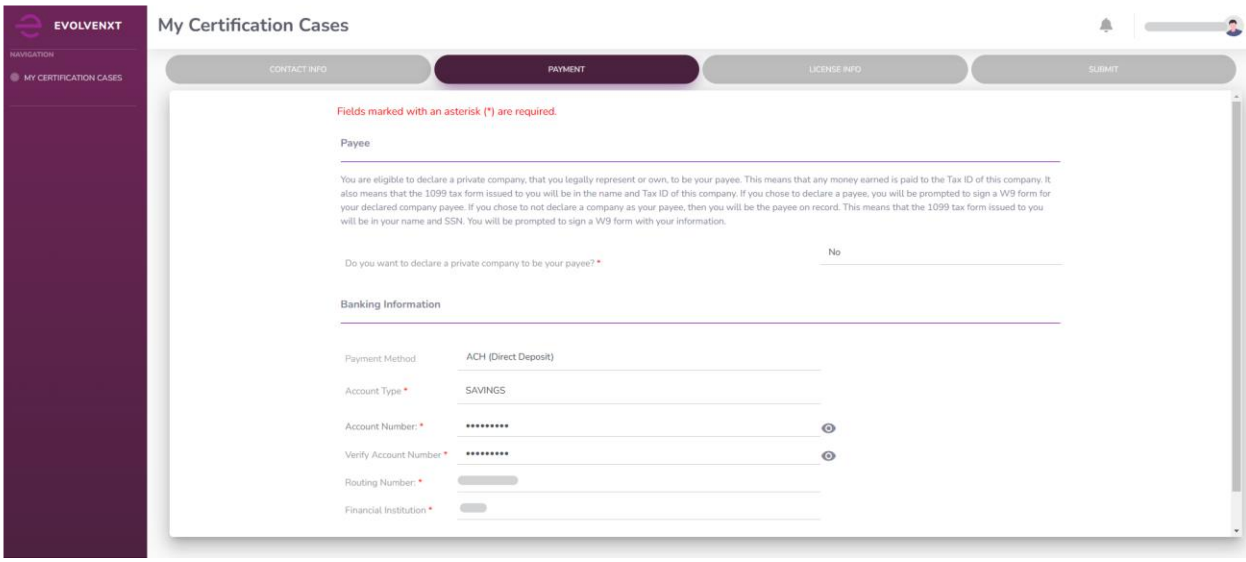
NPN is already in use

Verify and fill in appropriate information in the ‘Contact Info’ Tab and then click the “Continue” button.

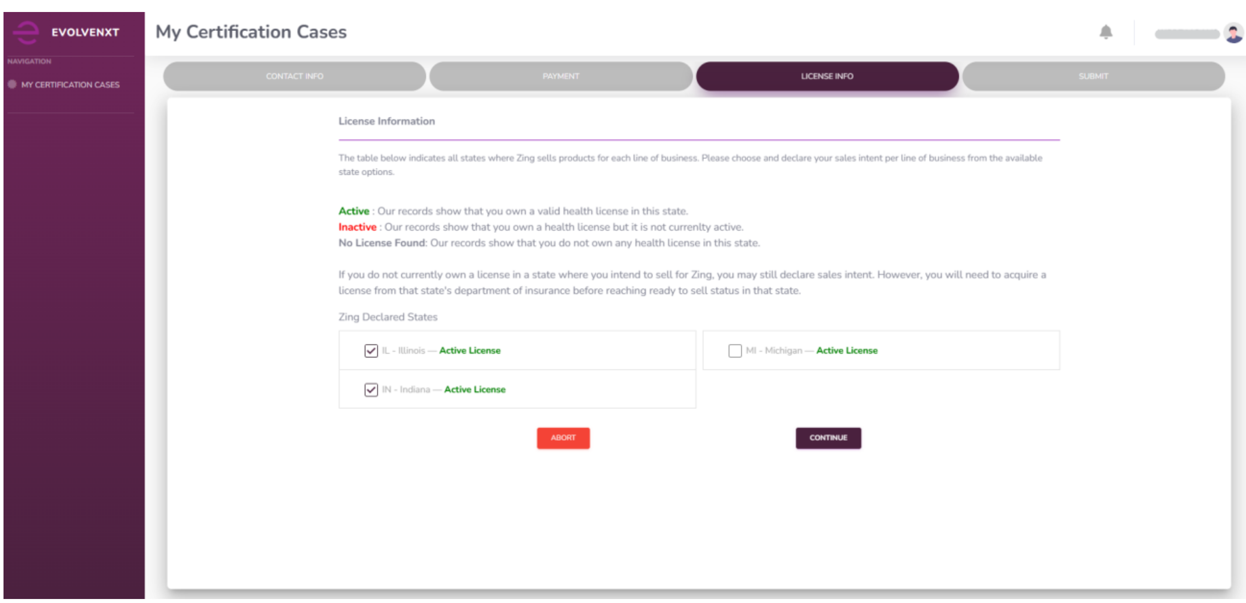




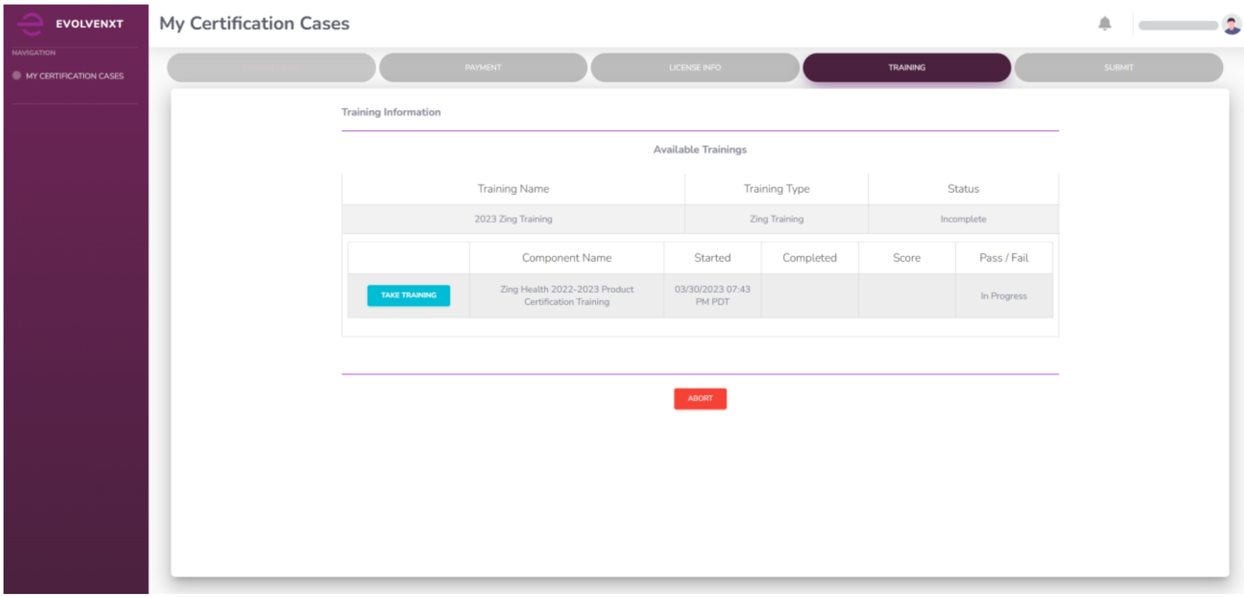
You are then taken to the next tab “Payment” to fill in financial information, and to answer some questions about the business structure if the payee is a corporation– after completing all the questions, click the “Continue” button.



Next, check all of the states for which your broker is eligible, then click “Continue.”

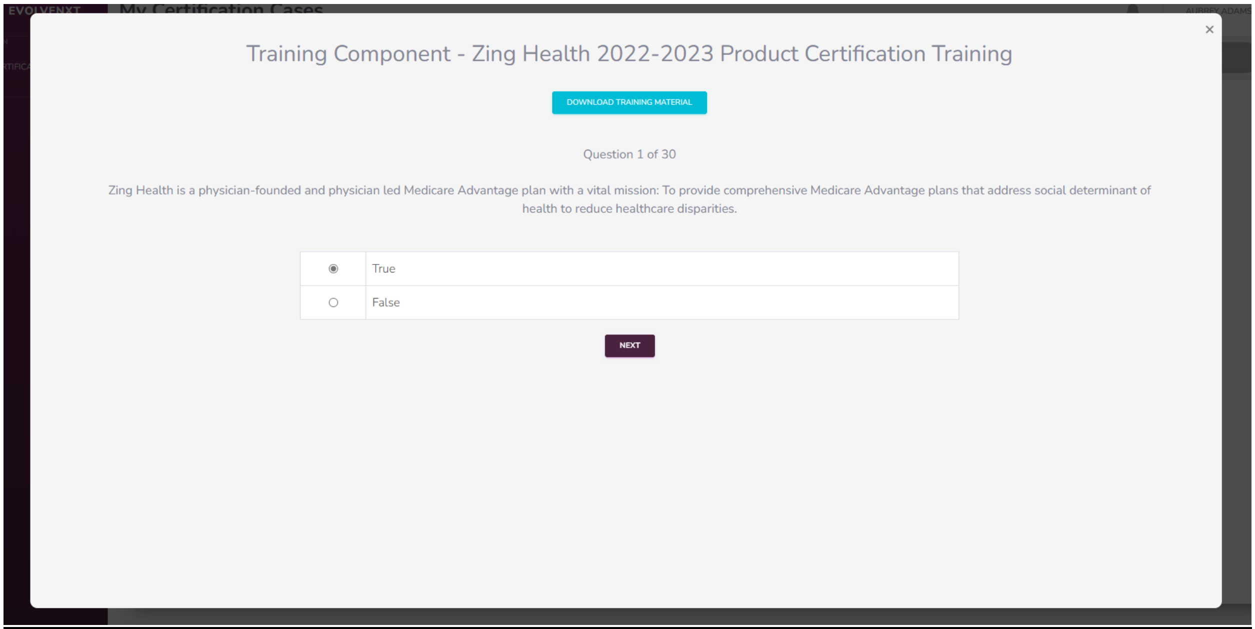


The "Training" module is 30 questions meant to test the prospective agency's knowledge of Zing's regulations.

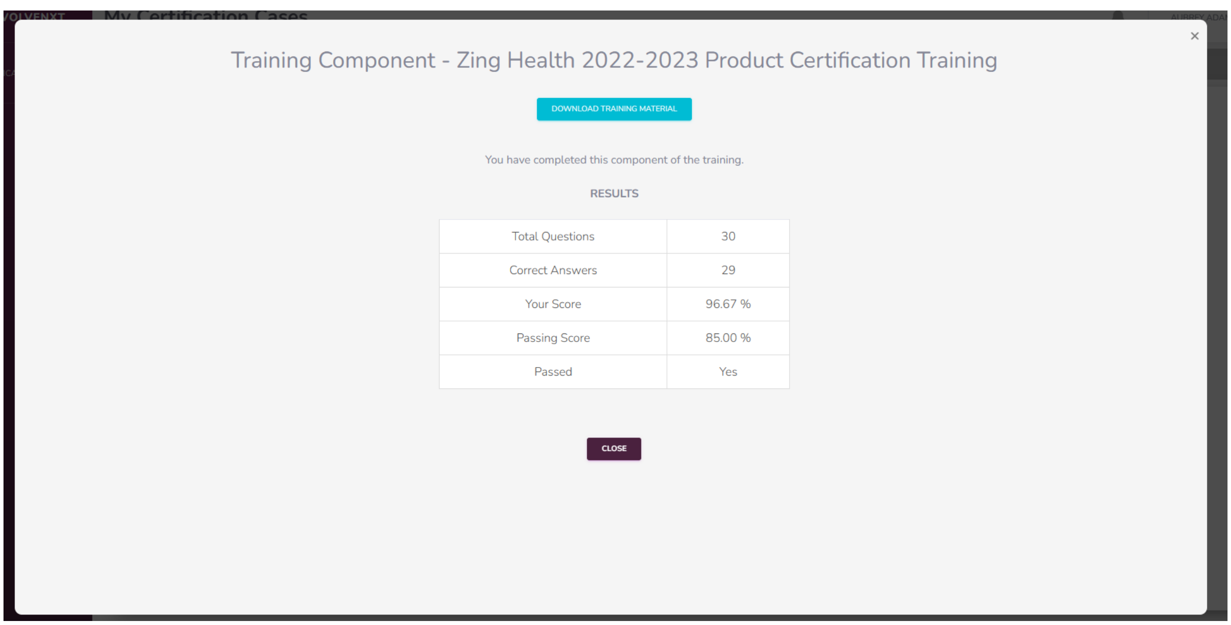


Upon clicking on 'Take Training' you will be given an opportunity to study for the exam by clicking on 'Download Training Material':

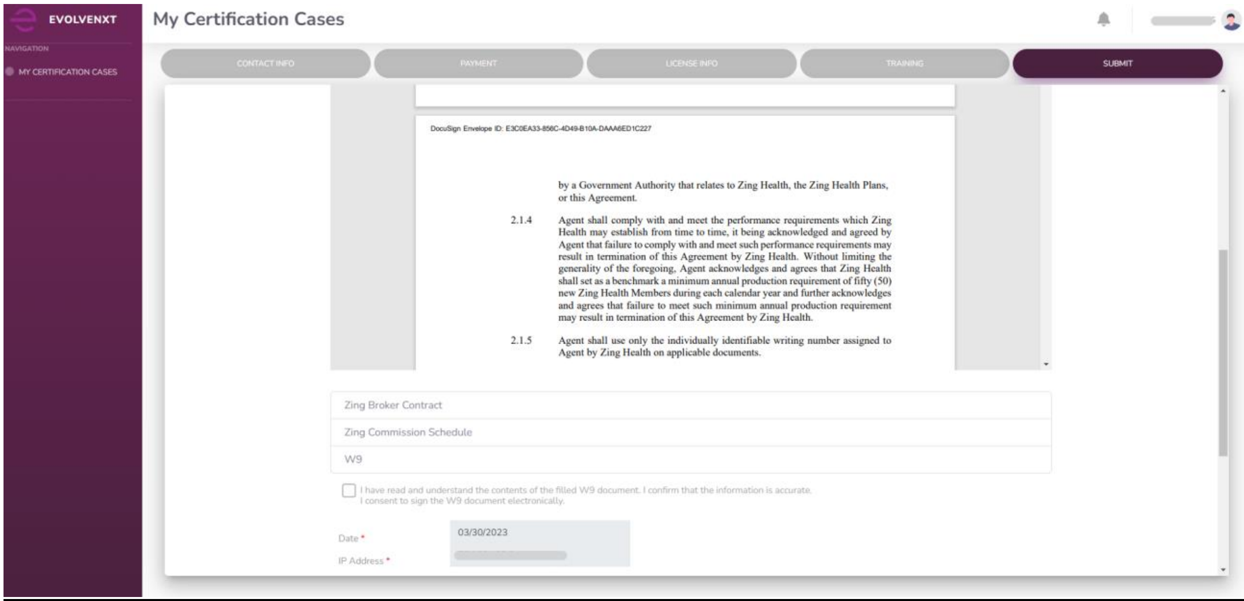
After clicking on “Take Quiz” the training begins.



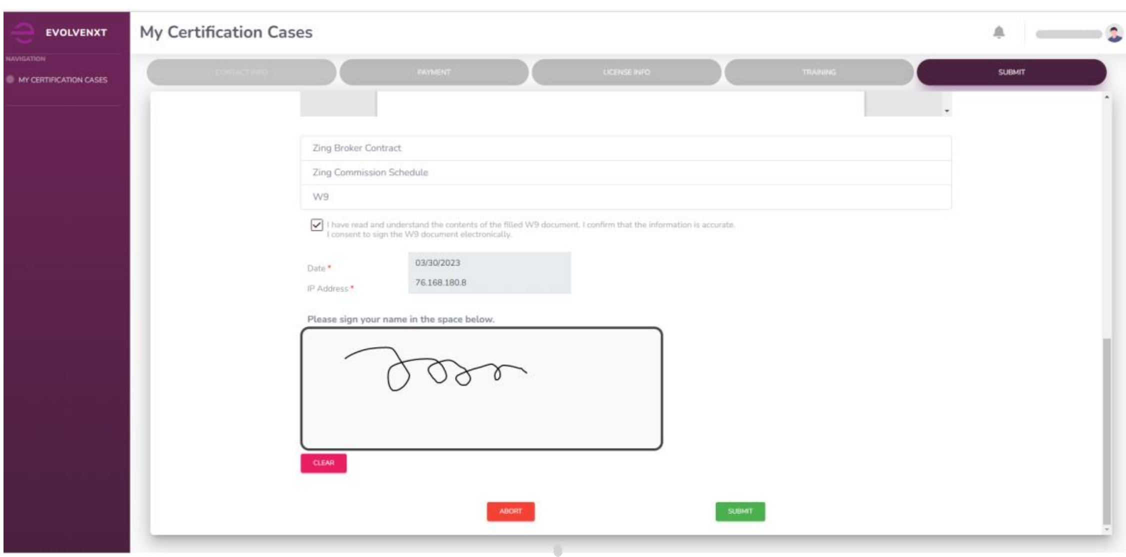
Complete the test. After getting a passing score, you will be able to click on “Continue” to take you to the final “Submit” step. Please note that candidates are given 3 chances to get an 85% passing score.



In the final “Submit” please first read the Agency Agreement then scroll down to the bottom of page:



Check the box, sign the document, and hit “Submit” to continue:



After the OB process is completed by the agency through the agency portal, you will be able to download both the Contract and the W-9.

Critical fields in the contract will be automatically filled in:

DocuSign Envelope ID: E3C0EA33-856C-4D49-B10A-DAAA6ED1C227

6.14 Notice. All notices and other communications pertaining to this Agreement shall be in writing and shall be deemed duly to have been given immediately if personally delivered to the other Party, one (1) business day after being sent by email (with delivery confirmation), three (3) business days after being sent by the United States Postal Service certified mail, return receipt requested, postage prepaid, and one (1) business day after by Federal Express, United Parcel Service or other nationally recognized overnight carriers. All notices or communications between Zing Health and Agent pertaining to this Agreement shall be addressed as follows:

If to Zing Health:
Attn: Garfield Collins, COO
Zing Health
303 W. Madison Suite 800
Chicago, IL 60606
Saadia.young@myzinghealth.com

If to AGENT:
Name: ______________________
Address: ______________________
____
Email: ______________________

With a copy not constituting notice to:
Attn: LaDale George
Perkins Coie LLP
131 S. Dearborn St., Suite 1700
Chicago, IL 60603
Lgeorge@perkinscoie.com

With a copy not constituting notice to:
Name: Mete Sahin, CFO
225 W. Washington Suite 450
Chicago, IL 60606
Mete.sahin@myzinghealth.com

Failure by either Party to provide courtesy notice at the address above negates the effectiveness of the entire notice.

6.15 Counterparts. This Agreement may be executed in one or more counterparts, and by the Parties hereto in separate counterparts, each of which when executed shall be deemed to be an original but all of which taken together shall constitute one and the same agreement.

6.16 Construction; Headings. The Parties acknowledge that each Party has reviewed this Agreement and that consequently any rule of construction to the effect that any ambiguities are to be resolved against the drafting Party is not applicable in the interpretation of this Agreement or any amendments or exhibits thereto. The headings hereto are for convenience only and shall not be used in any way to construe the terms of this Agreement.

6.17 Survival. Any provision of this Agreement that requires or reasonably contemplates the

Zing HEALTH™

evolveNXT
Incentivize, Inspire, Grow

Along with a completed W-9:

2

Form **W-9**
(Rev. October 2018)
Department of the Treasury
Internal Revenue Service

Request for Taxpayer Identification Number and Certification

► **Go to *www.irs.gov/FormW9* for instructions and the latest information.**

Give Form to the requester. Do not send to the IRS.

Print or type. See **Specific Instructions** on page 3.

1 Name (as shown on your income tax return). Name is required on this line; do not leave this line blank.
[redacted]

2 Business name/disregarded entity name, if different from above

3 Check appropriate box for federal tax classification of the person whose name is entered on line 1. Check only **one** of the following seven boxes.

☐ Individual/sole proprietor or single-member LLC ☒ C Corporation ☐ S Corporation ☐ Partnership ☐ Trust/estate

☐ Limited liability company. Enter the tax classification (C=C corporation, S=S corporation, P=Partnership) ► ______

Note: Check the appropriate box in the line above for the tax classification of the single-member owner. Do not check LLC if the LLC is classified as a single-member LLC that is disregarded from the owner unless the owner of the LLC is another LLC that is **not** disregarded from the owner for U.S. federal tax purposes. Otherwise, a single-member LLC that is disregarded from the owner should check the appropriate box for the tax classification of its owner.

☐ Other (see instructions) ►

4 Exemptions (codes apply only to certain entities, not individuals; see instructions on page 3):

Exempt payee code (if any) ______

Exemption from FATCA reporting code (if any) ______

(Applies to accounts maintained outside the U.S.)

5 Address (number, street, and apt. or suite no.) See instructions.
[redacted]

Requester's name and address (optional)

6 City, state, and ZIP code
[redacted]

7 List account number(s) here (optional)

Part I **Taxpayer Identification Number (TIN)**

Enter your TIN in the appropriate box. The TIN provided must match the name given on line 1 to avoid backup withholding. For individuals, this is generally your social security number (SSN). However, for a resident alien, sole proprietor, or disregarded entity, see the instructions for Part I, later. For other entities, it is your employer identification number (EIN). If you do not have a number, see *How to get a TIN,* later.

Note: If the account is in more than one name, see the instructions for line 1. Also see *What Name and Number To Give the Requester* for guidelines on whose number to enter.

Social security number

☐☐☐ - ☐☐ - ☐☐☐☐

or

Employer identification number

[redacted]

Part II **Certification**

Under penalties of perjury, I certify that:

1. 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
2. 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
3. I am a U.S. citizen or other U.S. person (defined below); and
4. The FATCA code(s) entered on this form (if any) indicating that I am exempt from FATCA reporting is correct.

Certification instructions. You must cross out 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 Part II, later.

Sign Here **Signature of U.S. person ►** [redacted] **Date ►** 5/18/22 3:57 PM

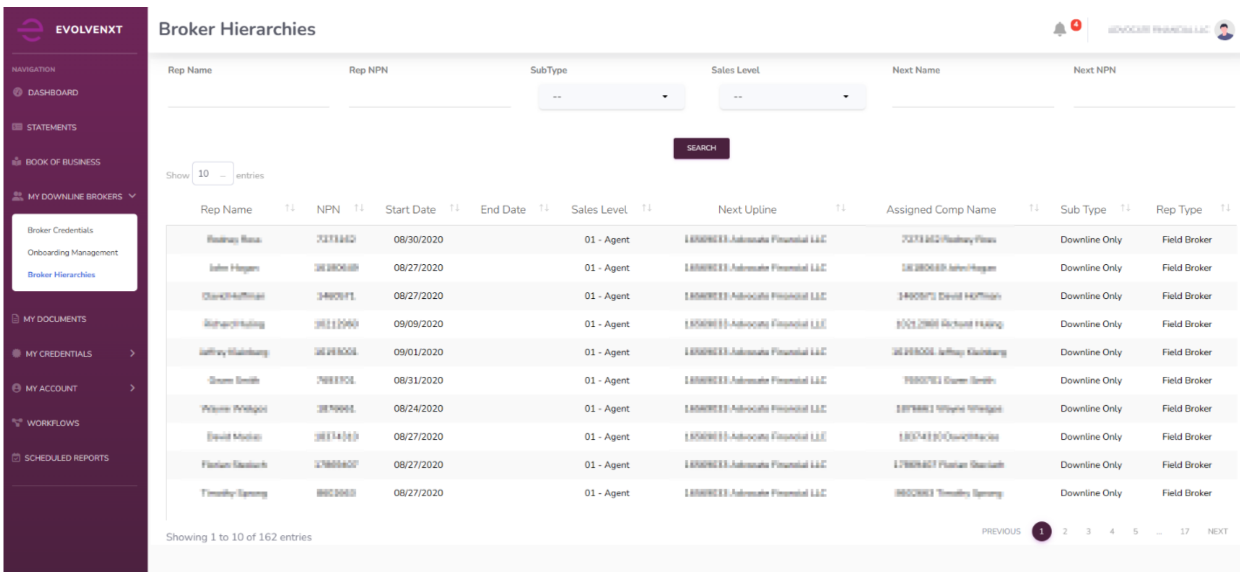
General Instructions

• Form 1099-DIV (dividends, including those from stocks or mutual

This is the final step of OB completed by the Agency in Portal. The final step to approve the onboarding case will be performed by a Zing team member with admin access.

4.2.3 Broker Hierarchies

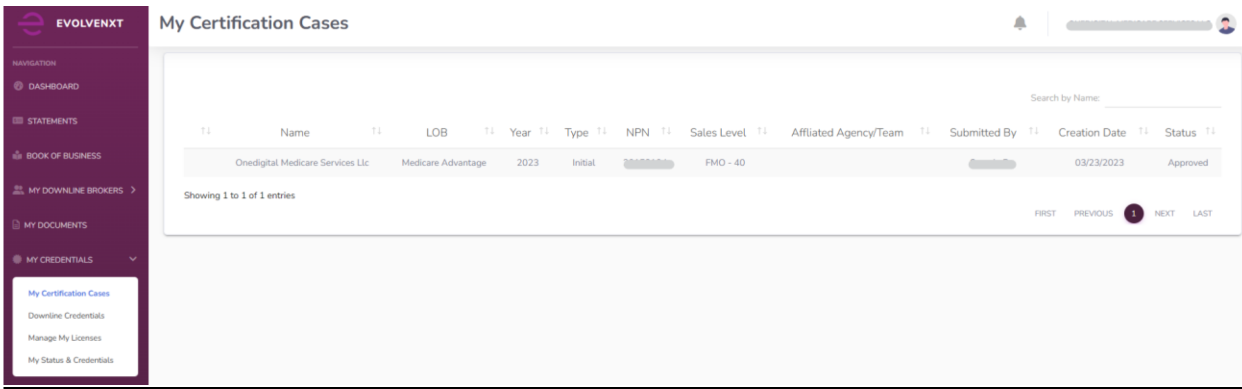
This screen allows you to view the upline for all your downline brokers.



5 My Credentials

5.1 My Certification Cases

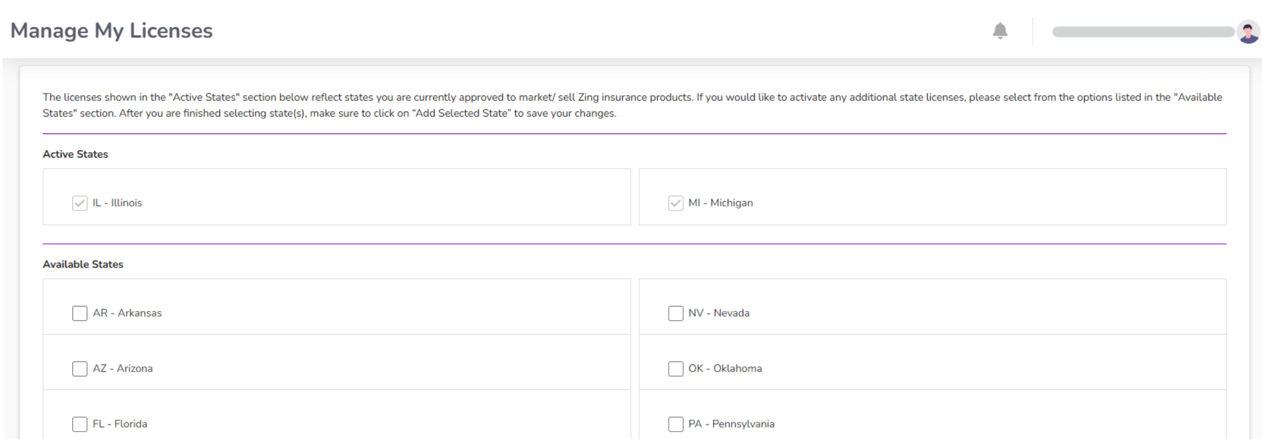
The My Certification Cases tab allows you to review and track your onboarding case history.



5.2 Manage My Licenses

Agencies will be given the opportunity to appoint the broker to write business for Zing in the states where they are licensed. For reference, the text in the screenshot states:

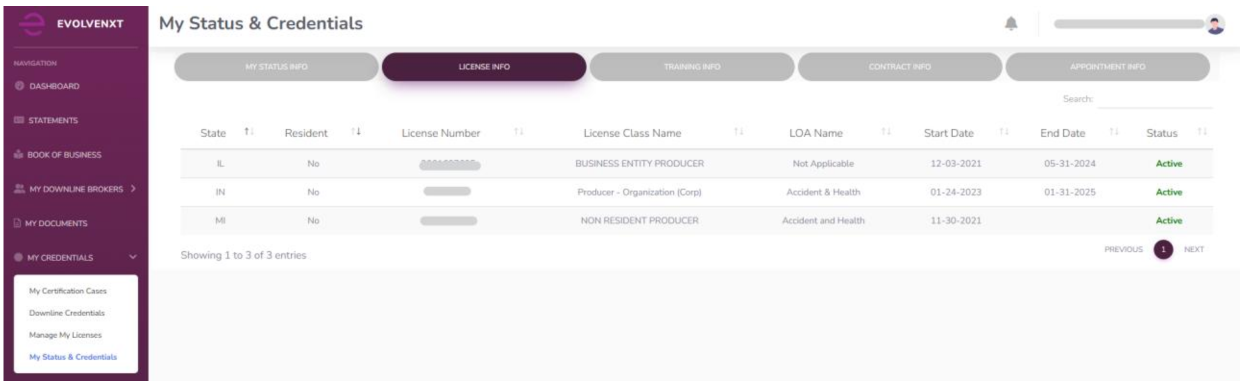
> *"The licenses shown in the 'Active Status' section below reflect states you are currently approved to market/ sell Zing insurance products. If you would like to activate any additional state licenses, please select from the options listed in the 'Available States' section. After you are finished selecting state(s), make sure to click on 'Add Selected State' to save your changes.*



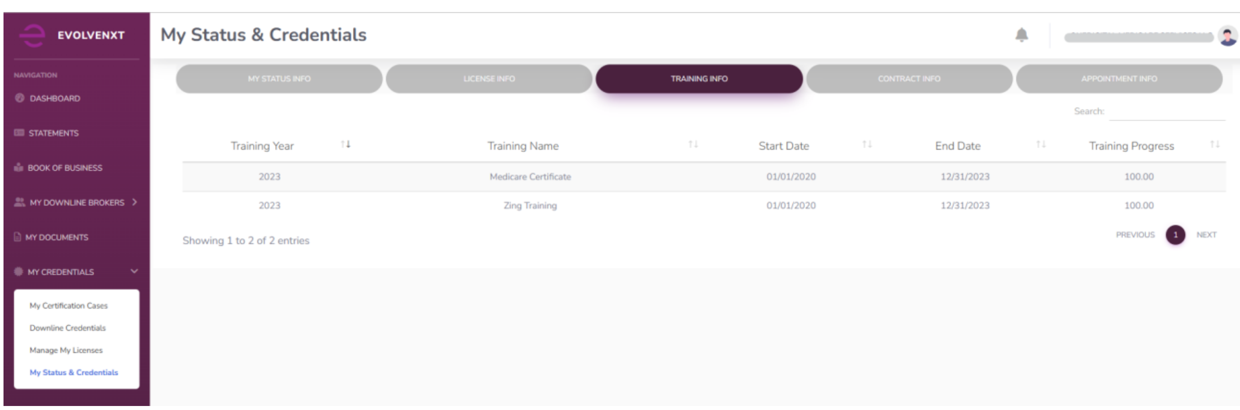
5.3 My Status and Credentials

The My Status tab displays information regarding your Resident License, current agreement with Zing, training requirements, and overall status.

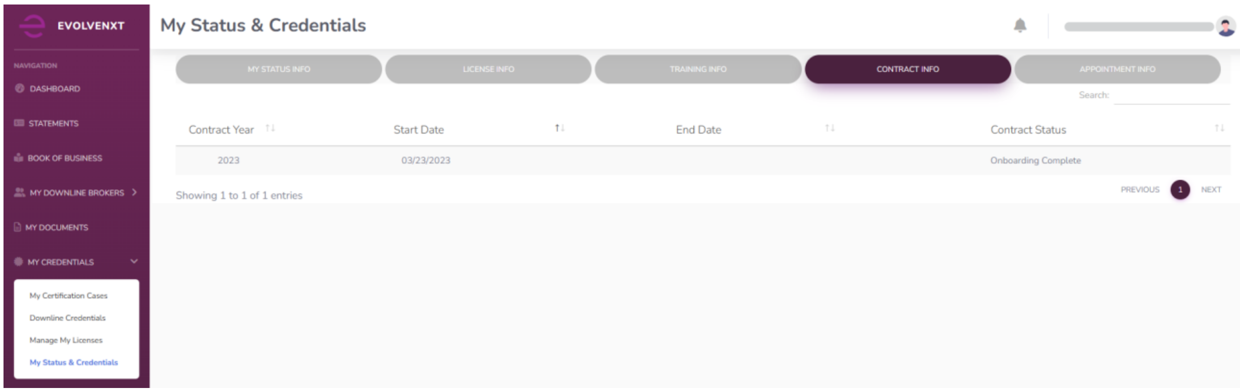
The License Info tab, for example, provides more details regarding the state licenses you have selected to market or sell Zing products with



The Training Info tab displays Medicare and Zing history and status

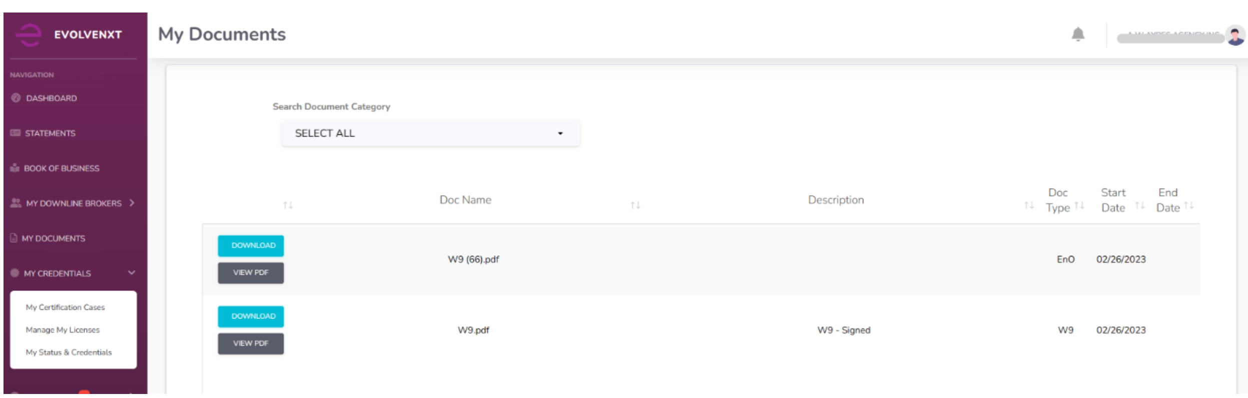


The Contract Info tab provides details regarding contract status with Zing. The End Date will remain blank as long as the contract remains valid.



6 My Documents

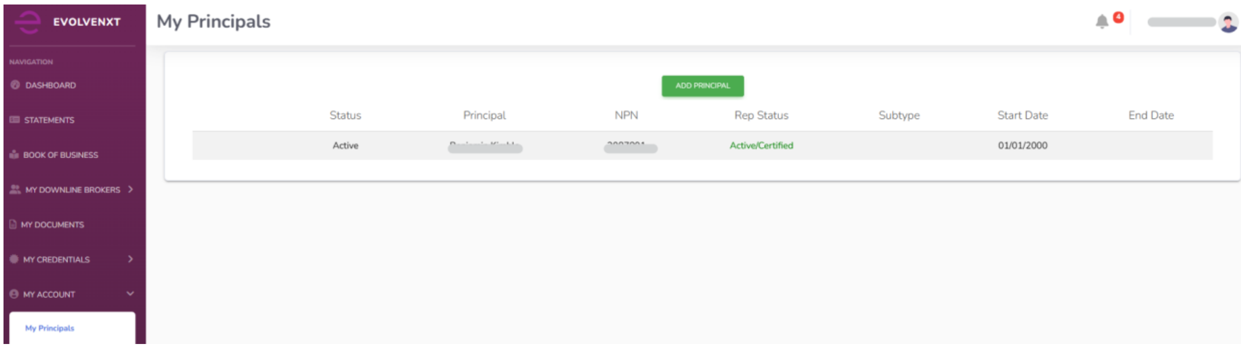
The My Documents tab houses all documents that are specific to you and are only visible within your portal. Documents will include a copy of your Zing contract, W9s, any contract addendums that may be required in the future, etc.



7 My Account

7.1 My Principals

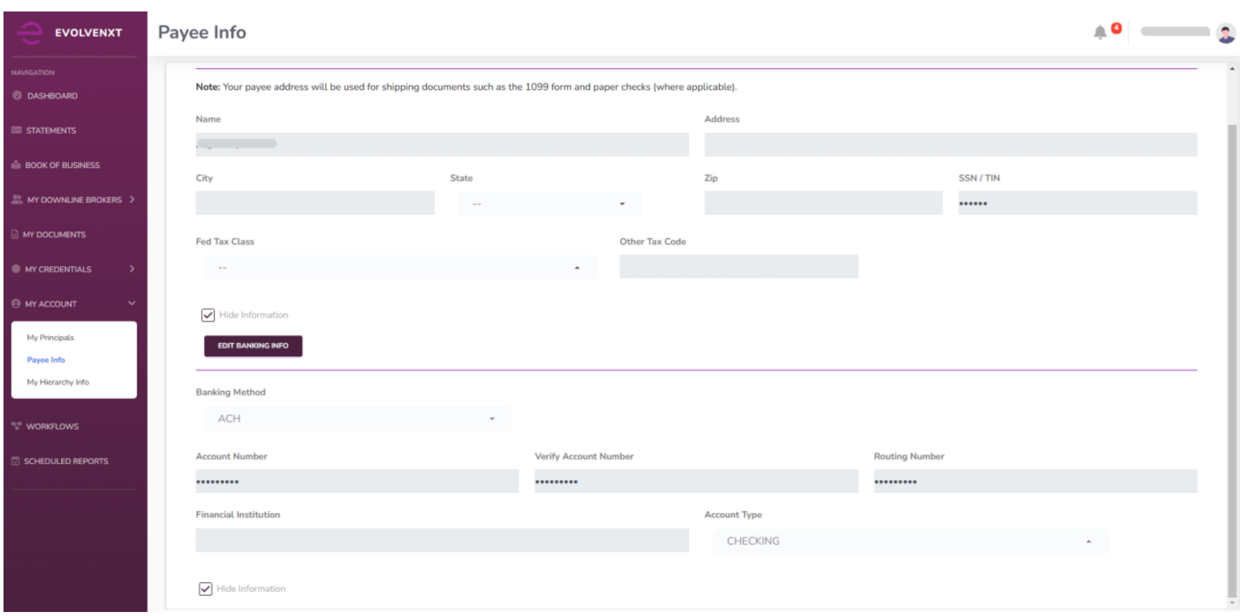
This is a simple interface to allow the agency to select a principal via NPN.



7.2 Payee Info

The Payee Info tab captures the name and address on file for payment. Select the Edit Payee Info tab to update the name or address. The 1099 that will generate will match the information on this screen.

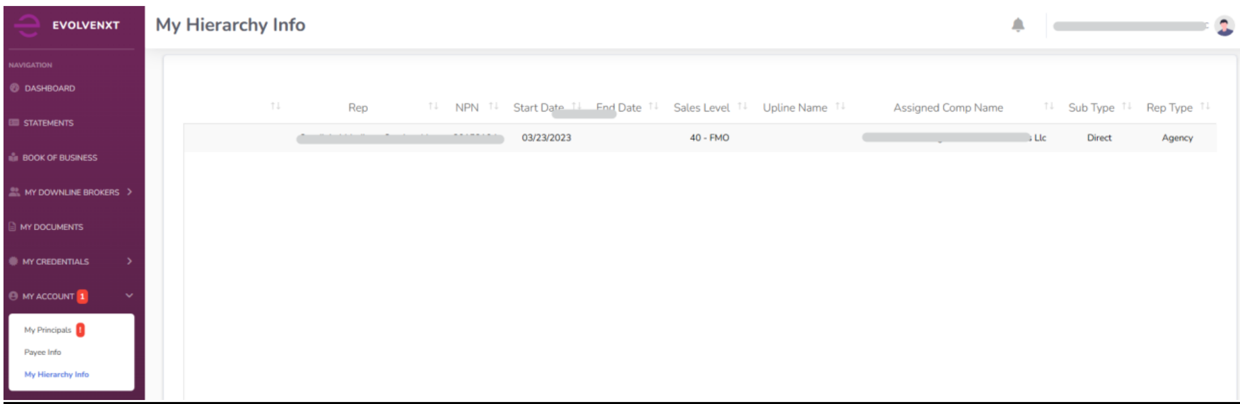
Note: Updating name or address will cause a prompt to complete a new W9 form. You must complete this W9 update for your changes to be saved.



7.3 My Hierarchy Info

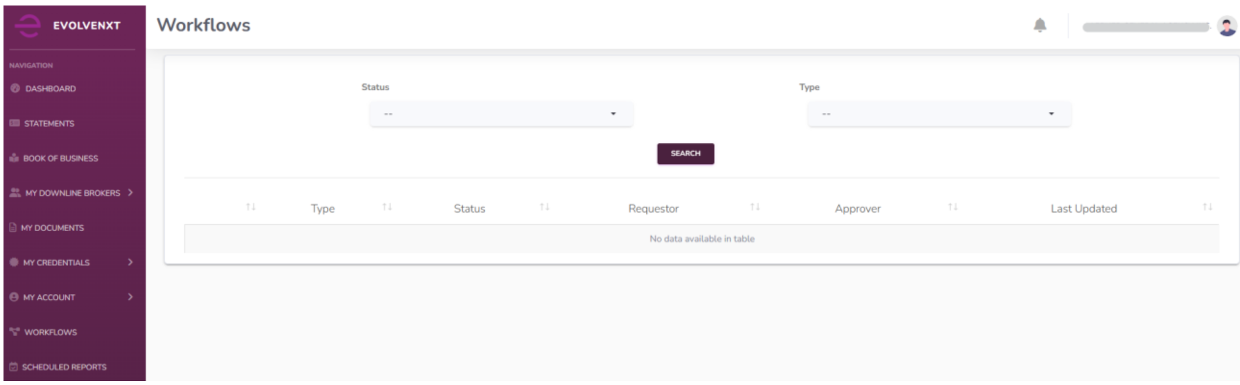
My Hierarchy Info

The My Hierarchy Info tab provides a snapshot of the level, upline information (if applicable), compensation assignment, Sub Type, and Broker Type. This tab will also provide upline history and the time spans where you were reporting to a different upline or were a different sub type.



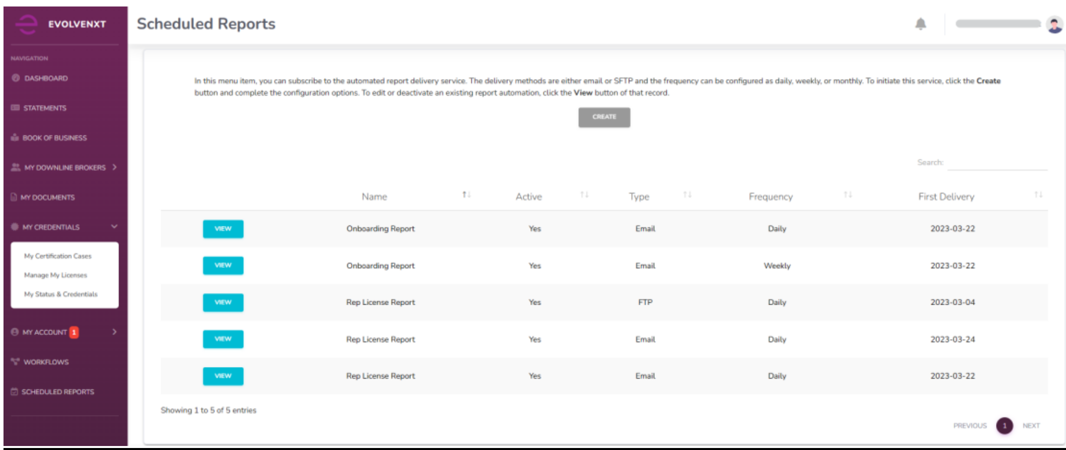
8 Workflows

The Workflows tab tracks all cases that have been created by or assigned to you. Workflows that can be completed in this tab include: completing a new W9, requesting a hierarchy change, becoming a principal of an agency, etc Workflows can be filtered by ‘Status’ and ‘Type’
Track when the Workflow was last updated and who is the assigned approver or cancel hierarchy change requests.



9 Scheduled Reports

Scheduled reports allow the agency to configure the delivery of specific reports via FTP through the user portal. To schedule a new report, click on the 'Create Button' at the top of the page. To see how the example in the dashboard is configured, click on 'View' to use the scheduled License Report delivery as a guide



Configure the fields below as shown in the sample, schedule frequency, method of transmission, and any additional email recipients you choose to include: