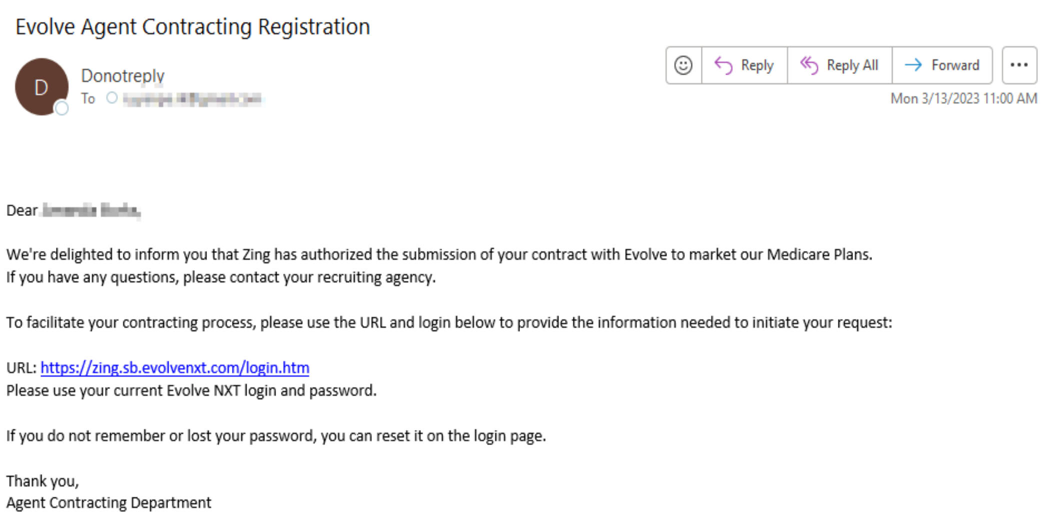
EvolveNXT Broker Guide 2023

Contents

1 Onboarding

1.1 New Broker Invitation

Once an onboarding invitation has been generated, you will receive an email that 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:

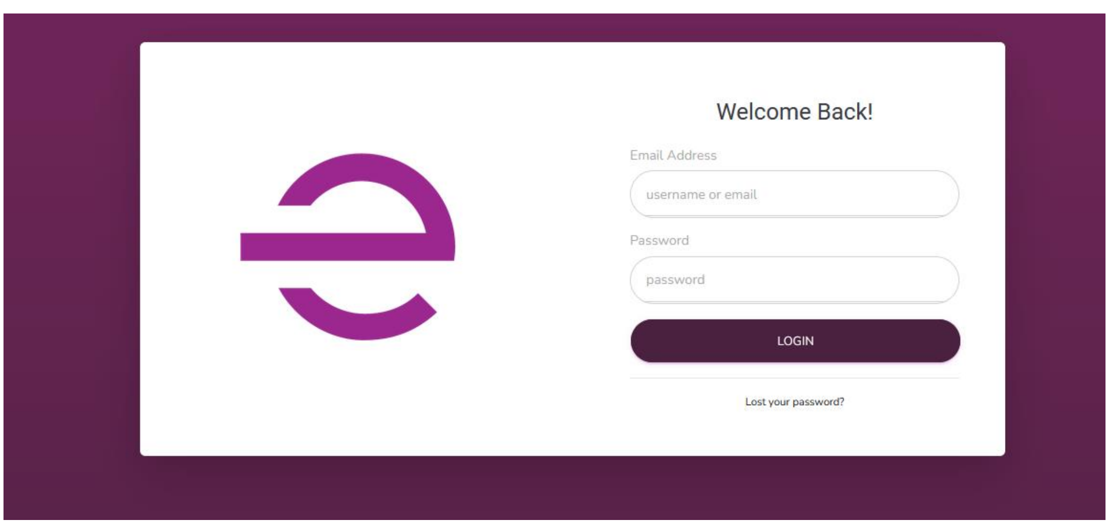
URL: https://zing.sb.evolvenxt.com/login.htm
Please use your current Evolve NXT login and password.

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

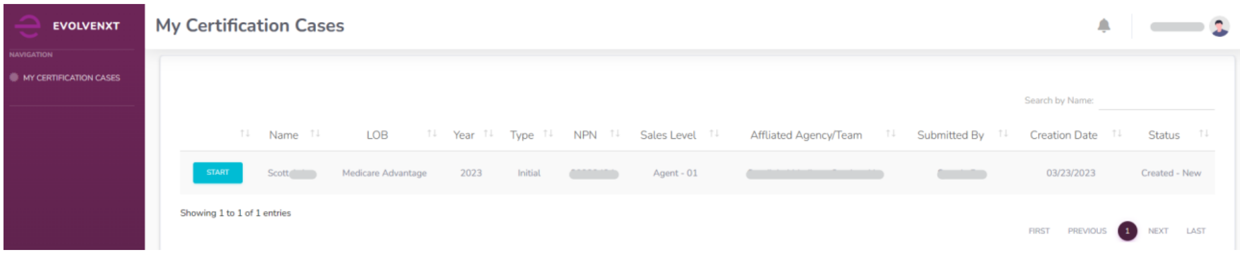
Thank you,
Agent Contracting Department

1.2 Broker Steps

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

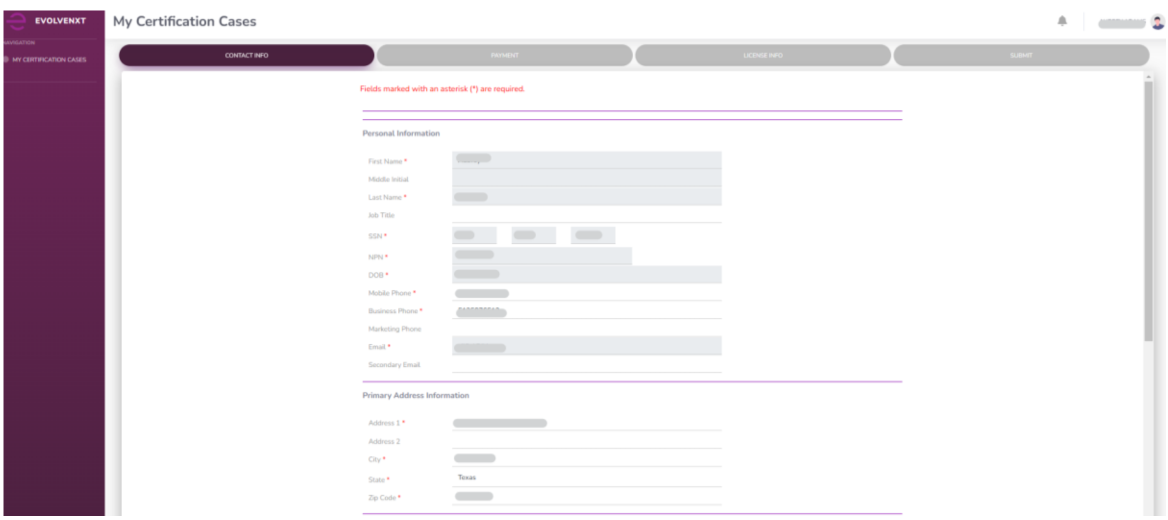


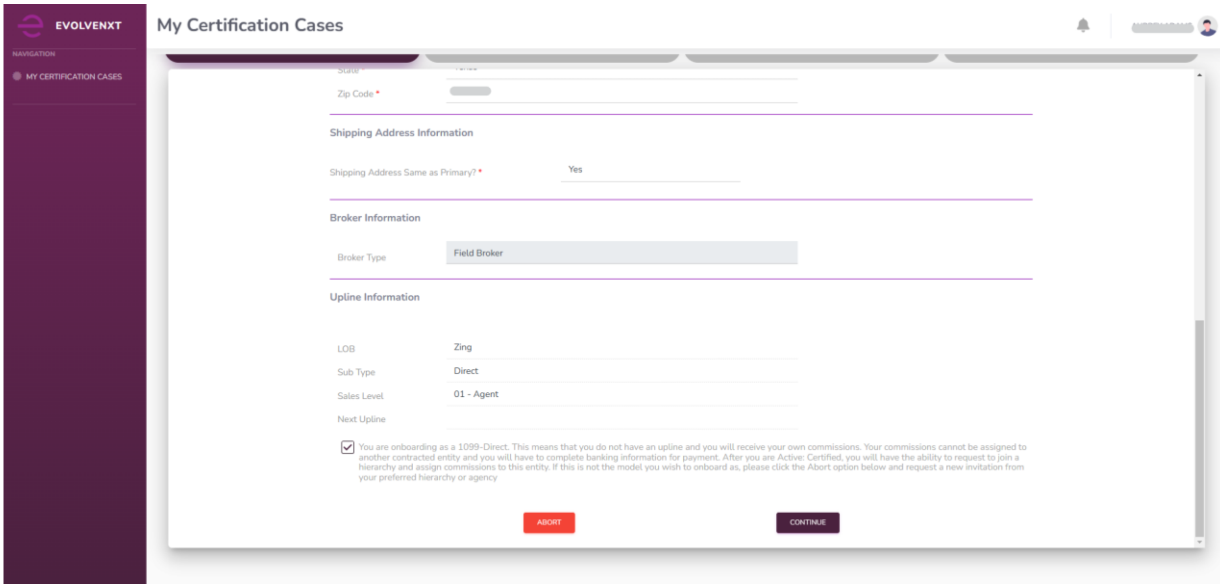
Once logged in, you will be able to onboard by clicking the "Start" button.



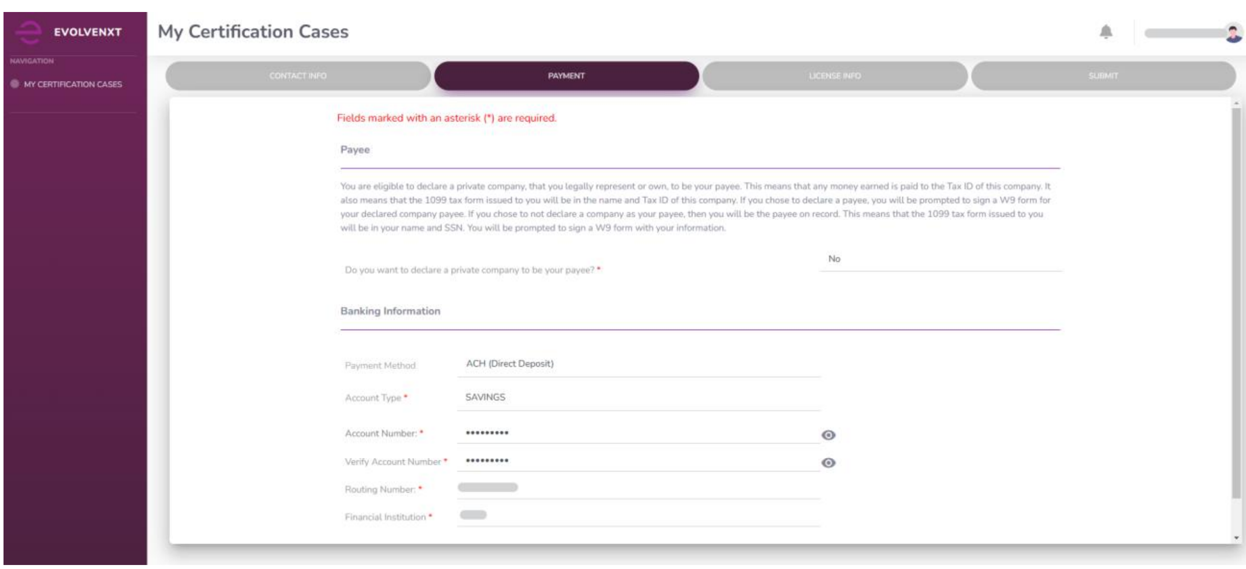
Reminder* If you are an Agency Principal, you will complete this step for your agency first, and then for you as an individual broker.

Verify and fill in appropriate information in the 'Contact Info' Tab and then click the "Continue" button.

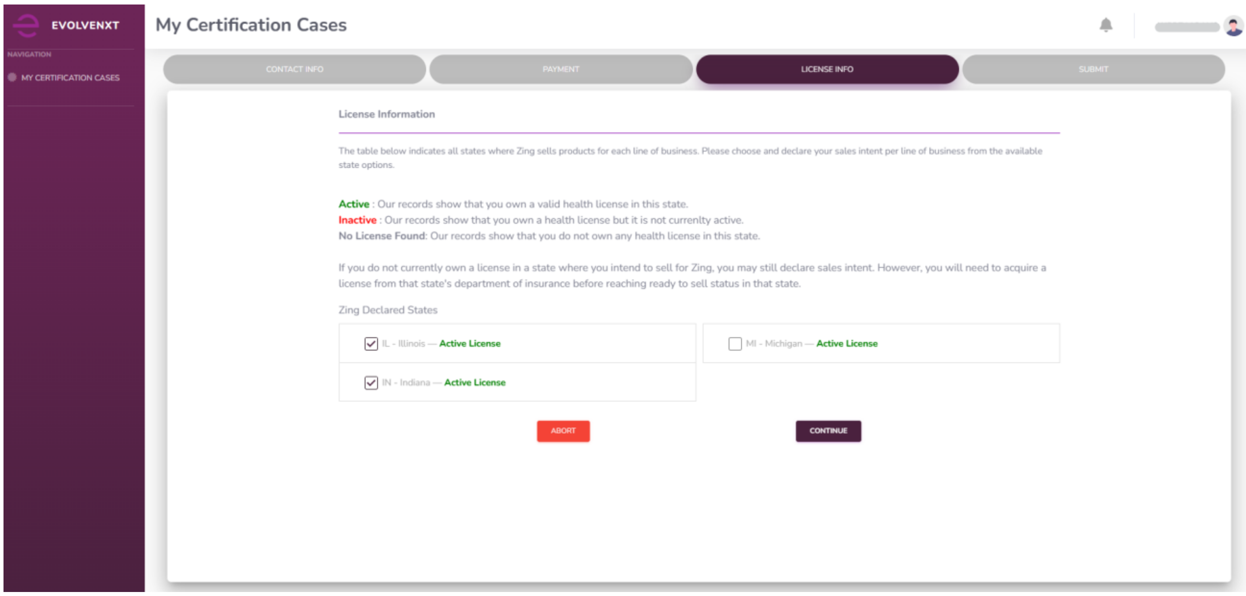




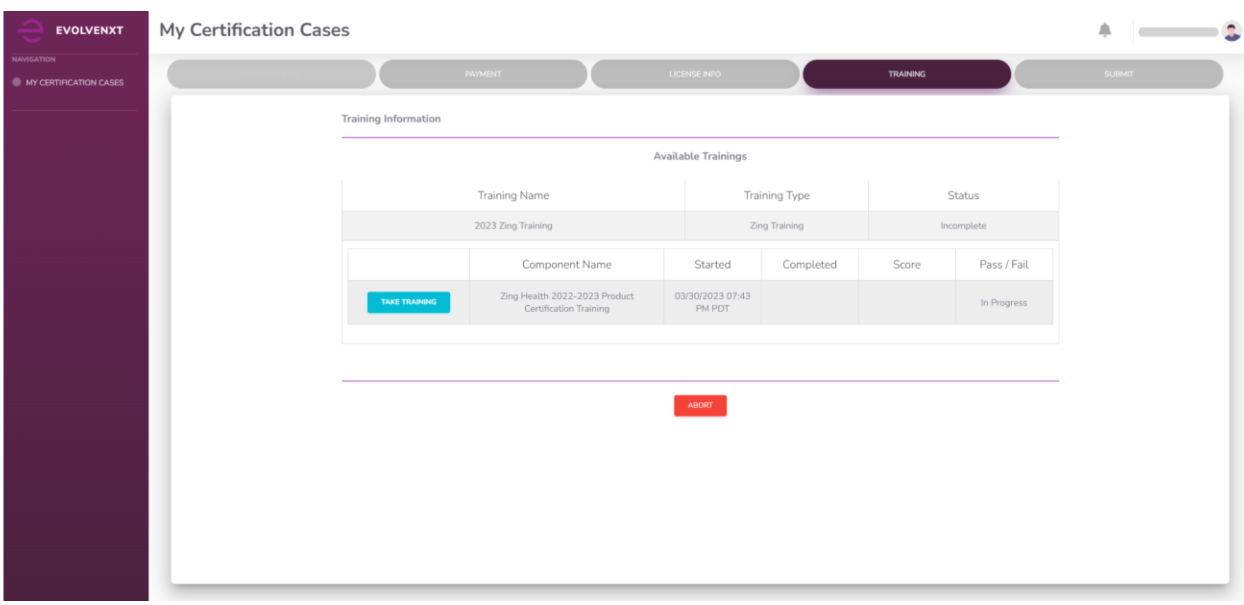
You are then taken to the next tab "Payment" to fill in financial information. **This step does not apply if you are an LOA agent.** After completing all the questions, click the "Continue" button



Next, check all of the states for which you are eligible for each line of business you will be contracting, then click "Continue"

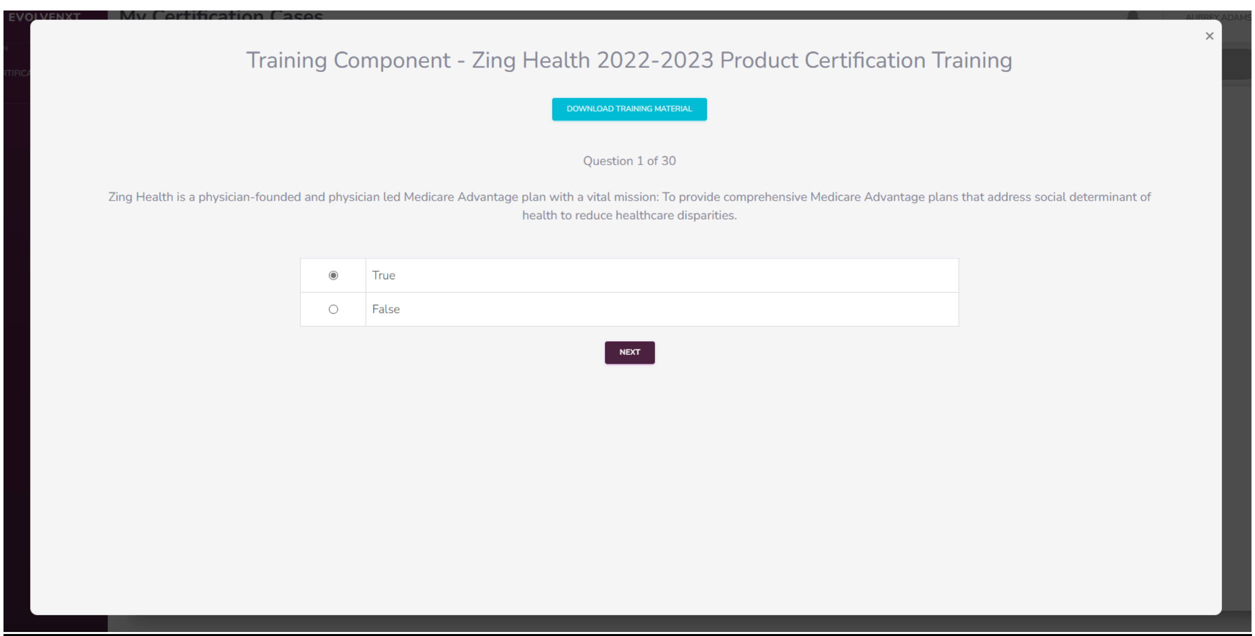


The "Training" module is 30 questions meant to your knowledge of Zing Health regulations.

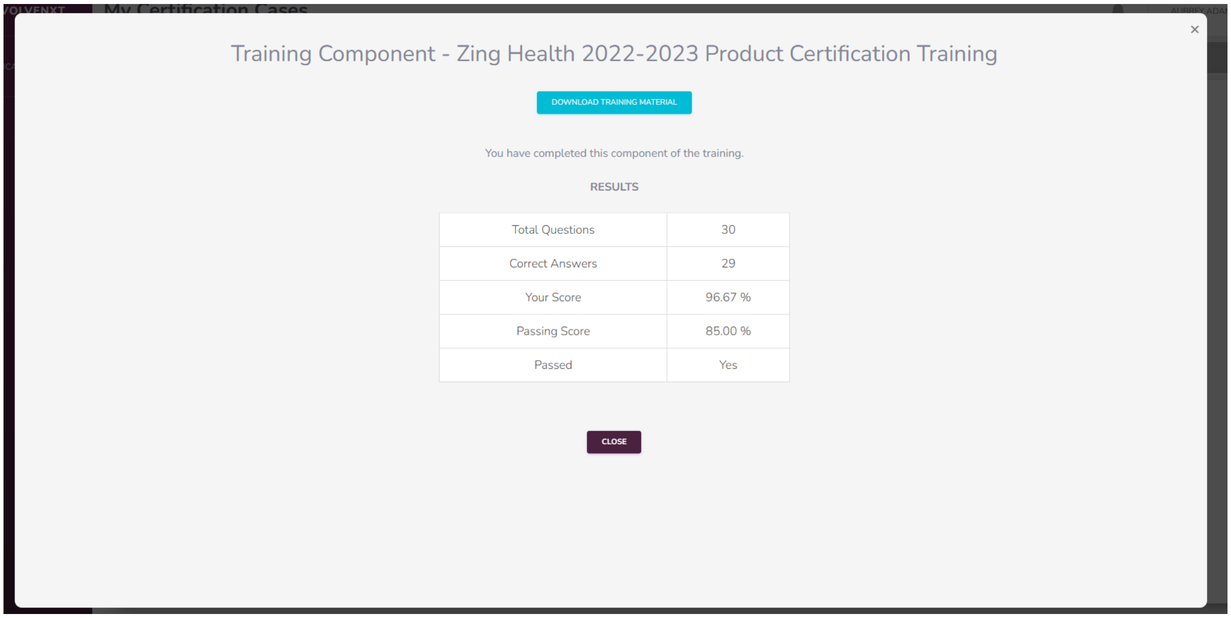


Upon clicking on 'Take Training' you will be given an opportunity to study for the exam by clicking on 'Download Training Material':

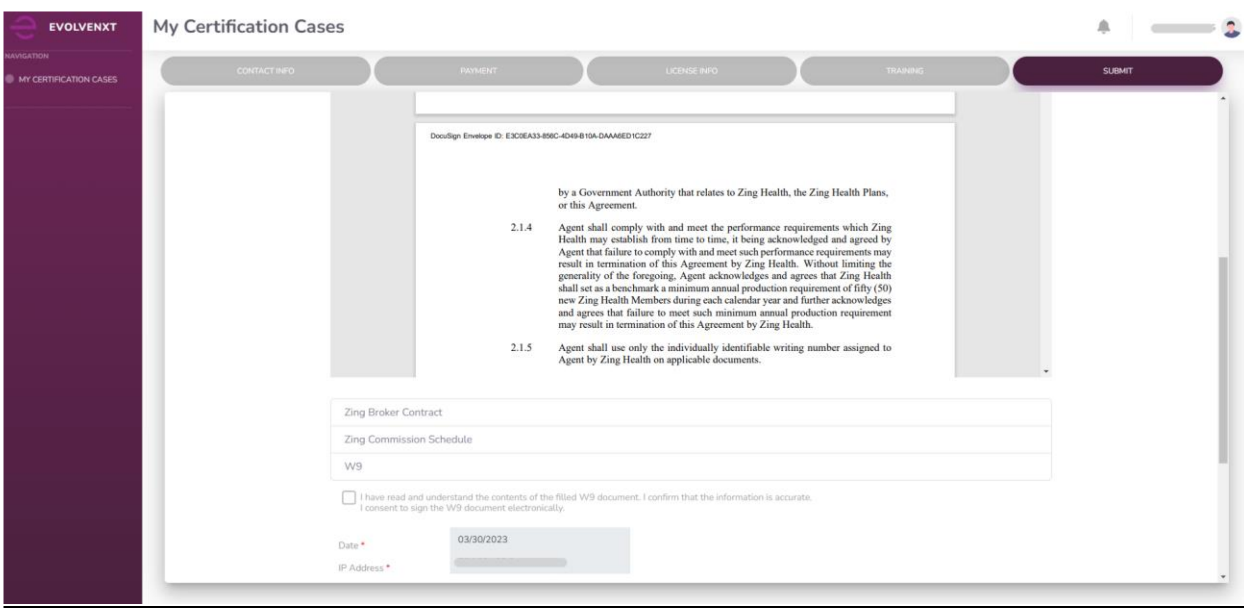
After clicking on "Take Quiz" the training begins.



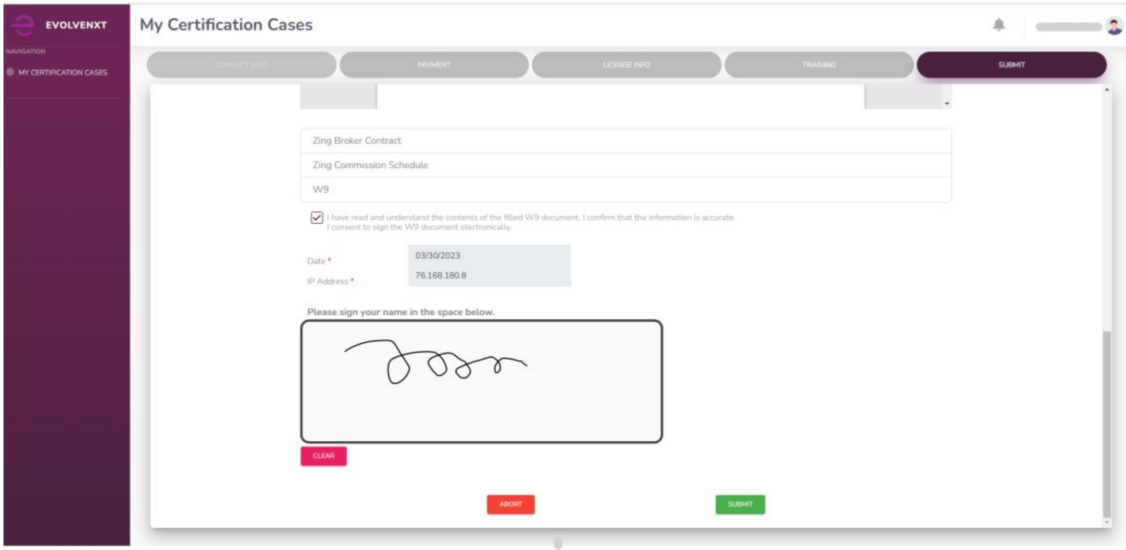
Complete the test. After getting a passing score, you will be able to click on “Continue” to take you to the final “Submit” step. Please note that candidates are given 3 chances to get an 85% passing score.



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

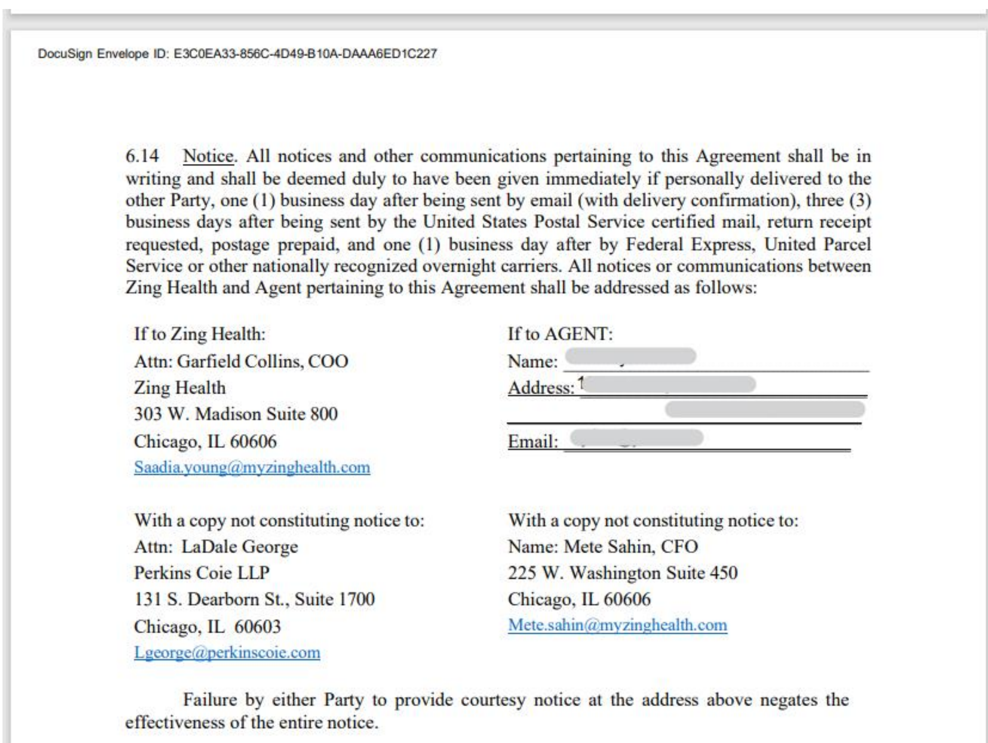


Check the box, sign the document, and hit “Submit” to continue:



After the onboarding process is completed 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:	If to AGENT:
Attn: Garfield Collins, COO	Name:
Zing Health	Address:
303 W. Madison Suite 800	
Chicago, IL 60606	Email:
Saadia.young@myzinghealth.com	
With a copy not constituting notice to:	With a copy not constituting notice to:
Attn: LaDale George	Name: Mete Sahin, CFO
Perkins Coie LLP	225 W. Washington Suite 450
131 S. Dearborn St., Suite 1700	Chicago, IL 60606
Chicago, IL 60603	Mete.sahin@myzinghealth.com
Lgeorge@perkinscoie.com	

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

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

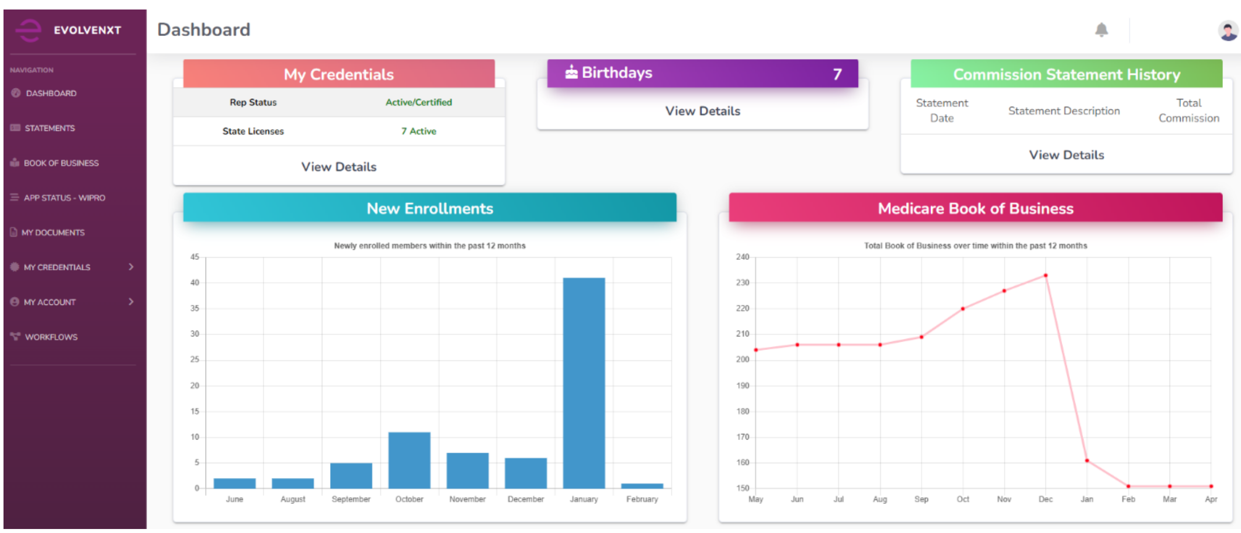
EvolveNXT Broker Portal: Dashboard

Broker Portal

The Broker Portal displays all the information about your credentials, providing accurate, current data on membership enrollment and quick access to commission statements. All the items in the portal are accessible through the left side menu.

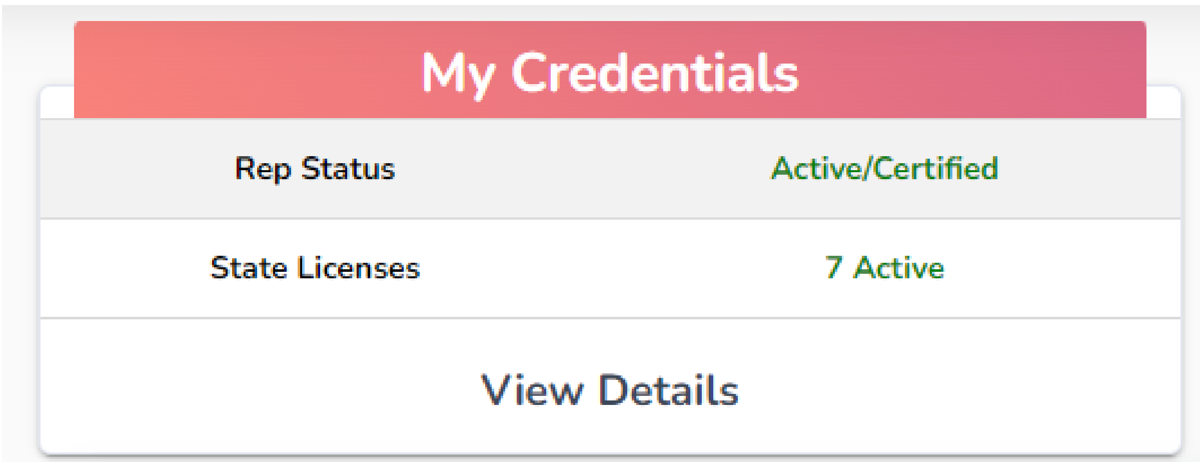
2 Dashboard

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:



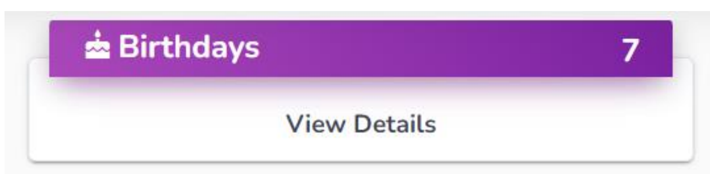
2.1 (Sample) Individual Widget Descriptions:

2.1.1 My Credentials



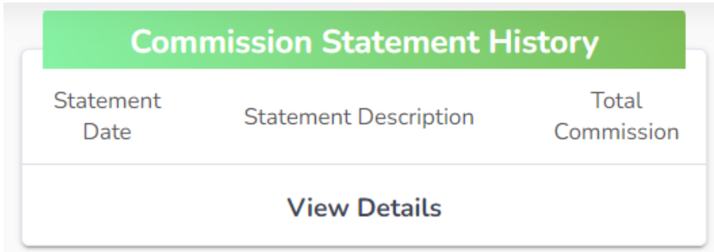
This widget will display your status with the health plan as well as your license information.

2.1.2 Birthdays



This widget can be configured to show your clients who have upcoming birthdays.

2.1.3 Commission Statement History



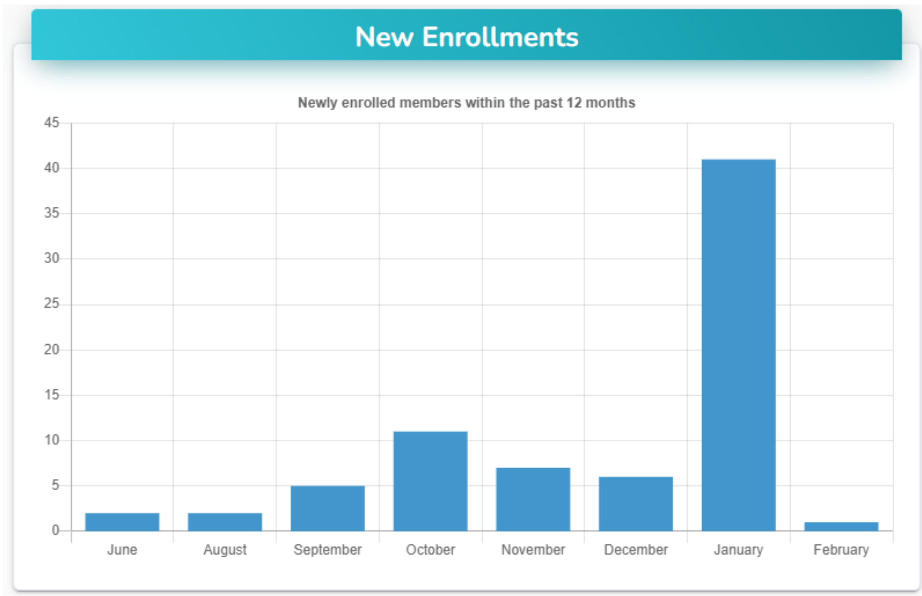
Displays the most recent statements in the dashboard, clicking on "View Details" will take you to the following screen. (Also accessible from "Statements" tab in the left hand menu)

Reminder – if you are an LOA agent, you will not be able to view your commission statements through this platform. Please reach out to your upline for this information.

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
View	93648	02/13/2023	[illegible]	2	$0.00	$-50.00	$0.00	$-50.00		0.00

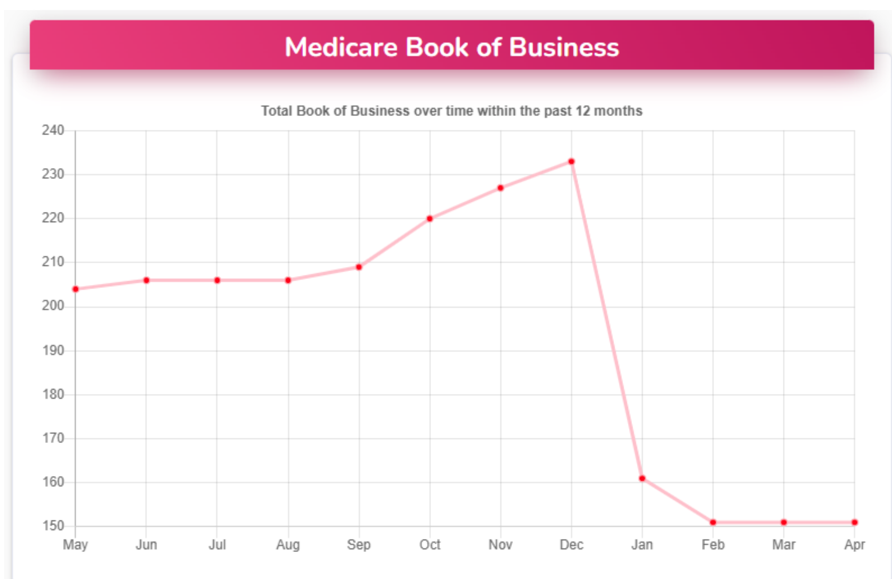
2.1.4 New Enrollments



Displays new enrollments over the past year

2.1.5 Medicare Book of Business

View total book of business within the last 12 months.



EvolveNXT Broker Portal: Side Navigation Menu

Side Navigation Menu

From the left-hand Navigation Menu, you can view statements, search enrollments in your book of business, track your applications, view your credentials and update your account.

3 Statements

If your commissions are paid to you by the health plan, you can view your commission statements. 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
View	93648	02/13/2023	[illegible]	2	$0.00	$-50.00	$0.00	$-50.00		0.00

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
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

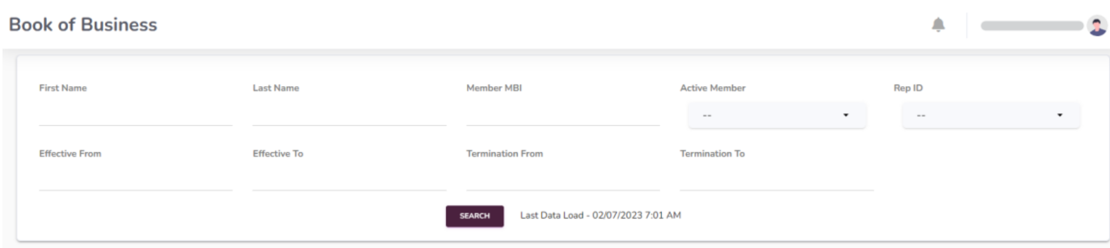
By clicking “View” to the left of a Statement for a given date, you will be able to see the details of the members that were paid out and download a PDF or Excel of the statement in the top left corner.

4 Book of Business

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

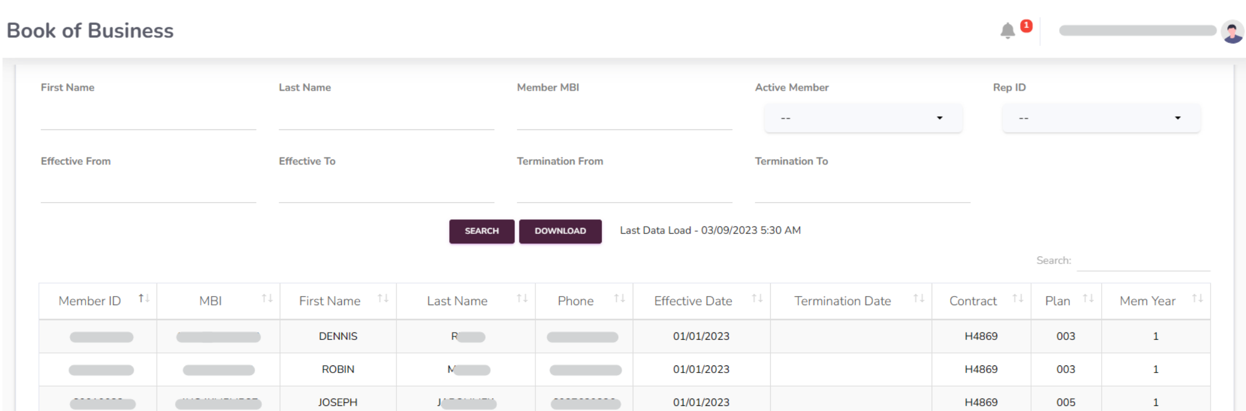
Enter one of the below filters to look for a specific member, or search for members by category. Once the search criteria is entered, select ‘Search’ to generate results. Select ‘Download’ at any time to export your Book of Business into Excel.

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:

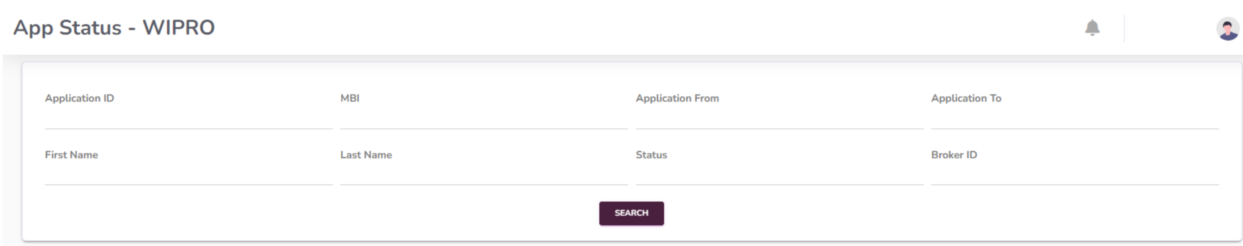


5 App Status

The App Status tab will display all your application submitted.

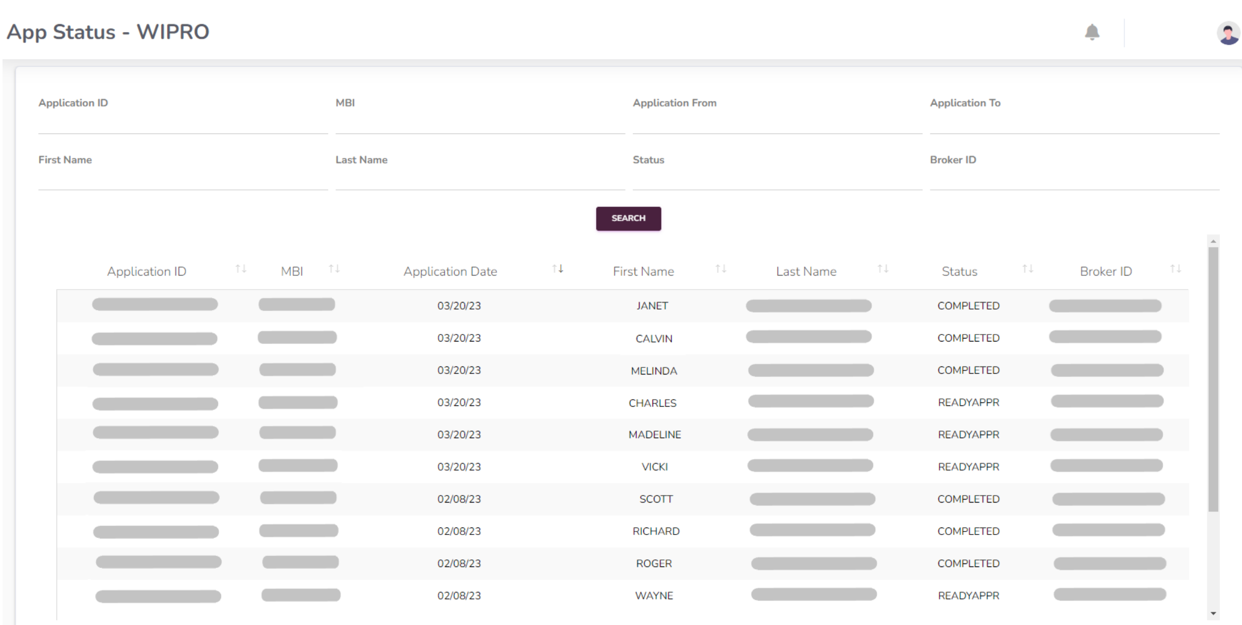
Enter one of the below filters to look for a specific member, or search for members by category. Once the search criteria is entered, select 'Search' to generate results. Select 'Download' at any time to export your Book of Business into Excel.

Search Screen:



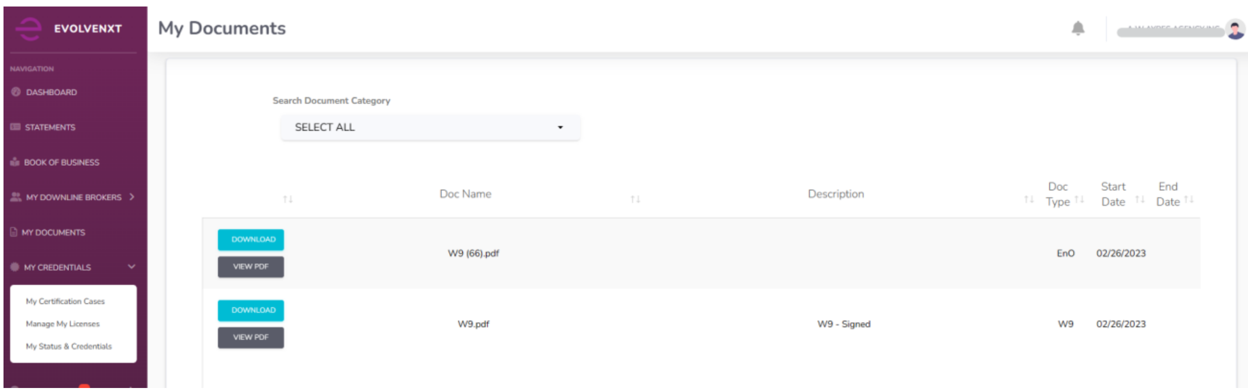
Once you select the 'Search' button, applicant information related to the search criteria will be displayed. From the screen below you can navigate through the list of applicants. You can also use the open text 'Search' at the top right to search among search results.

Search Results Screen:



6 My Documents

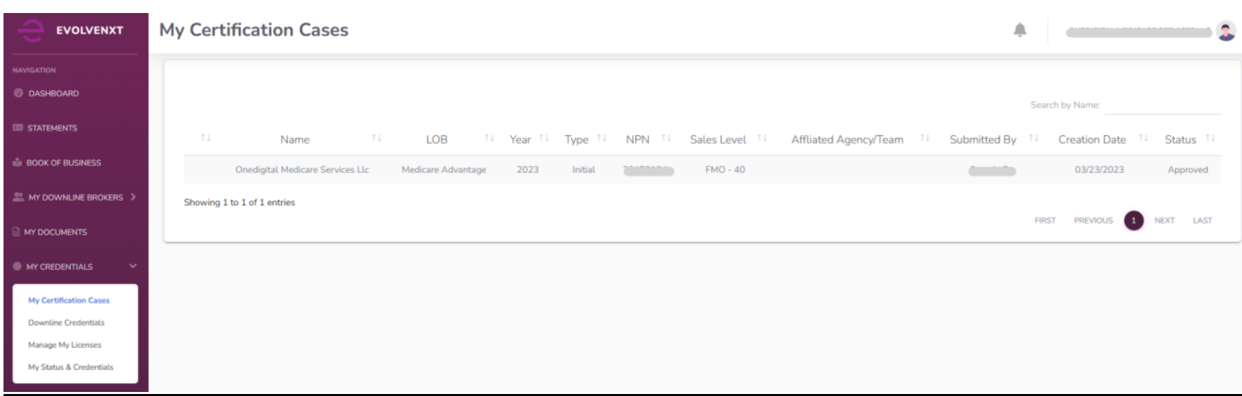
The My Documents tab houses all documents that are specific to you and are only visible within your portal. Documents will include a copy of your Zing Health contract, W9s, any contract addendums that may be required in the future, etc.



7 My Credentials

7.1 My Certification Cases

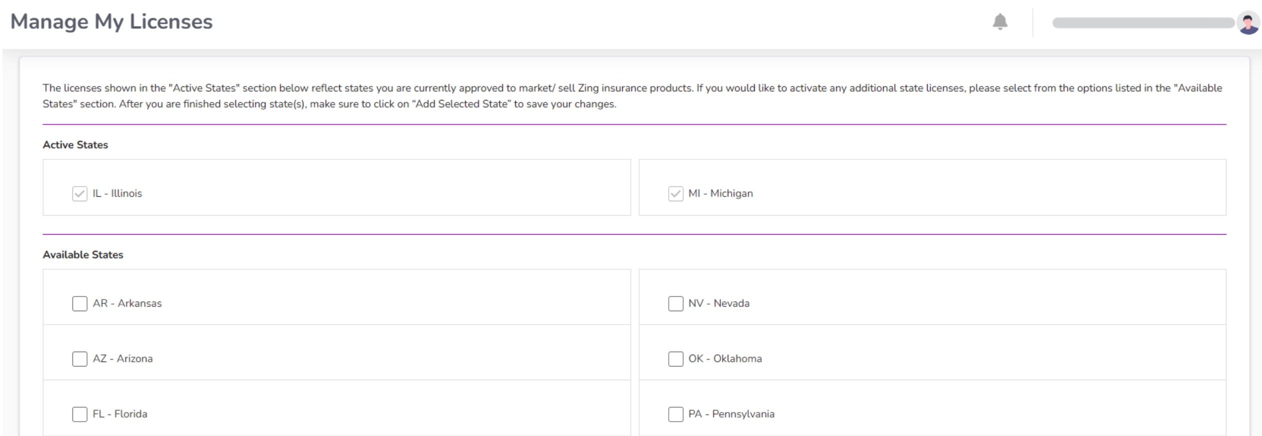
The My Certification Cases tab allows you to review and track your history.



7.2 Manage My Licenses

Here you can view your Zing Health declared states:

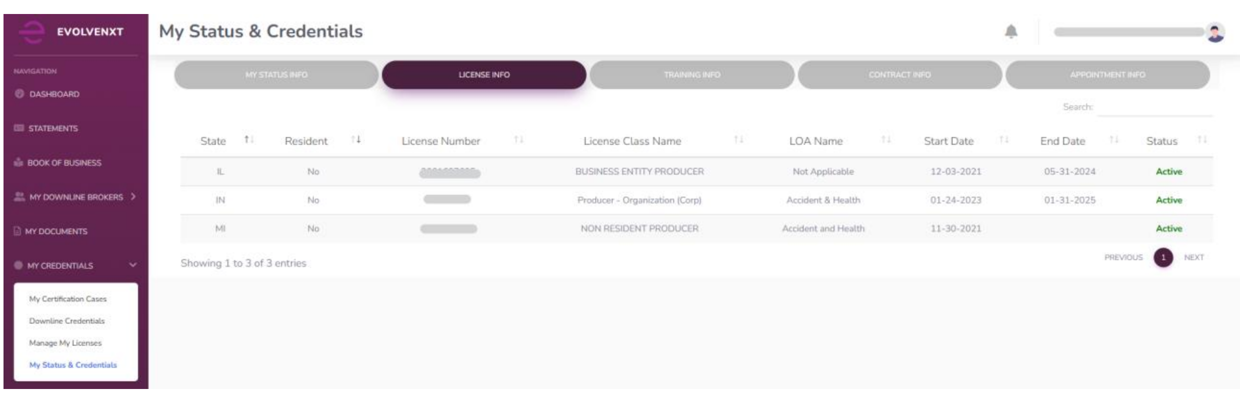
> *"The licenses shown in the 'Active Status' section below reflect states you are currently approved to market/ sell Zing insurance products. If you would like to activate any additional state licenses, please select from the options listed in the 'Available States' section. After you are finished selecting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



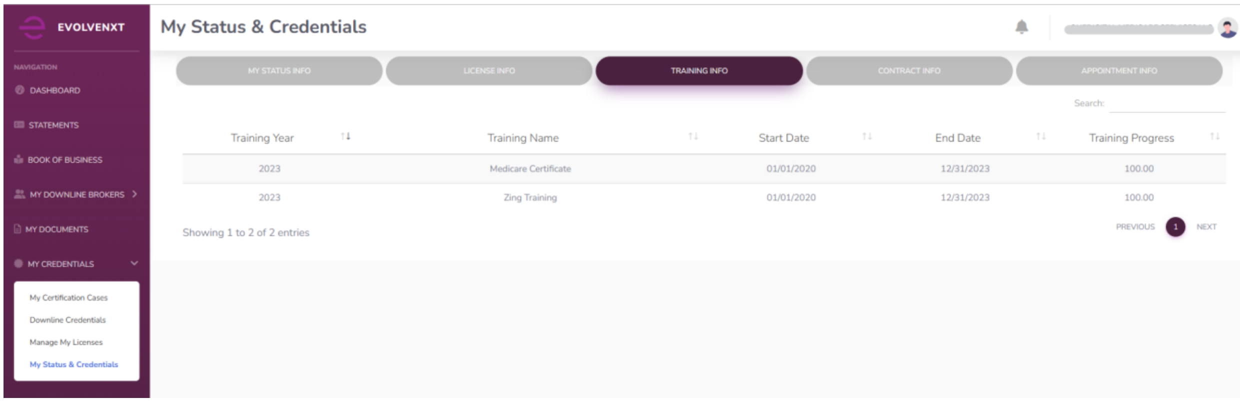
7.3 My Status and Credentials

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

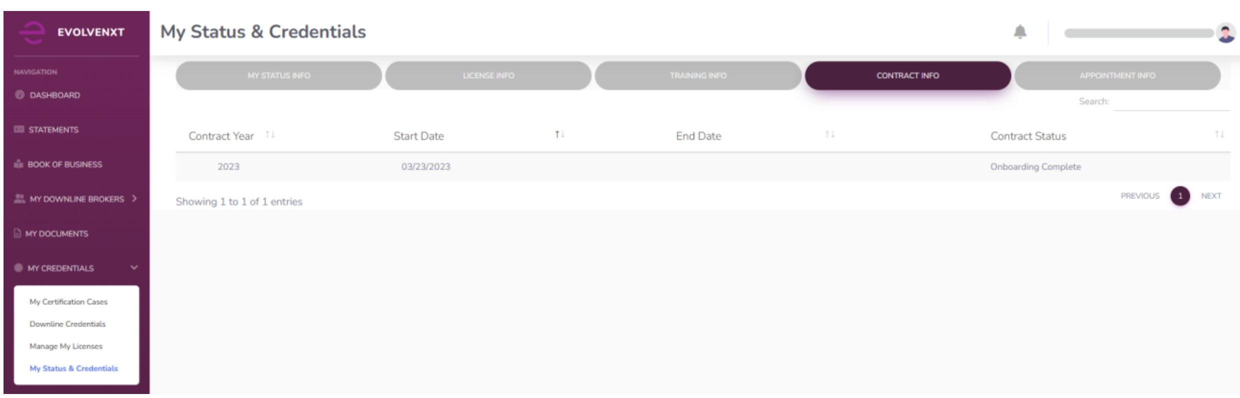
The License Info tab, for example, provides more details regarding the state licenses you have selected to market or sell Zing products with



The Training Info tab displays Medicare Compliance & FWA along with Zing Health history and status.



The Contract Info tab provides details regarding contract status with Zing Health.



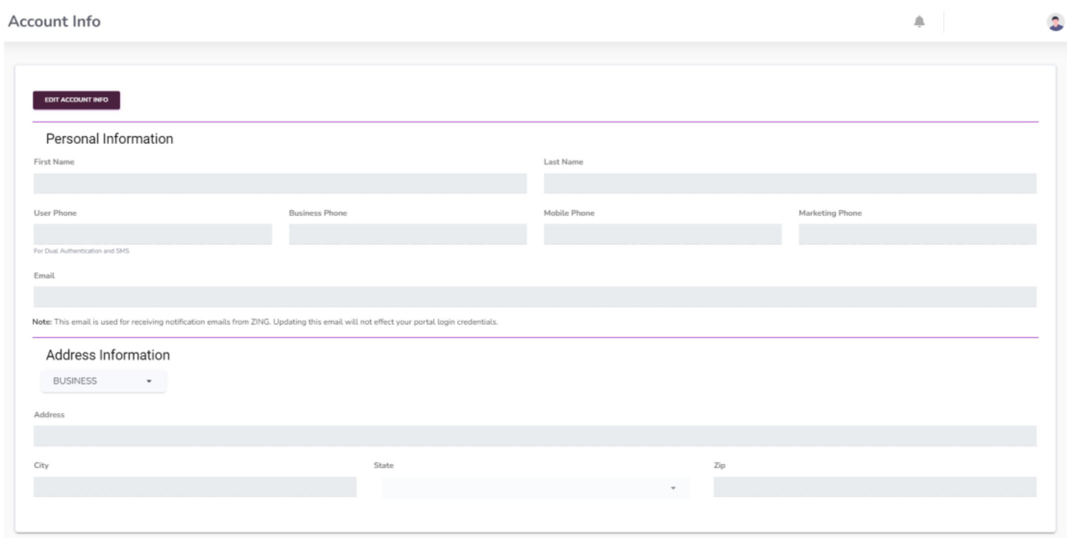
8 My Account

8.1 Account Info

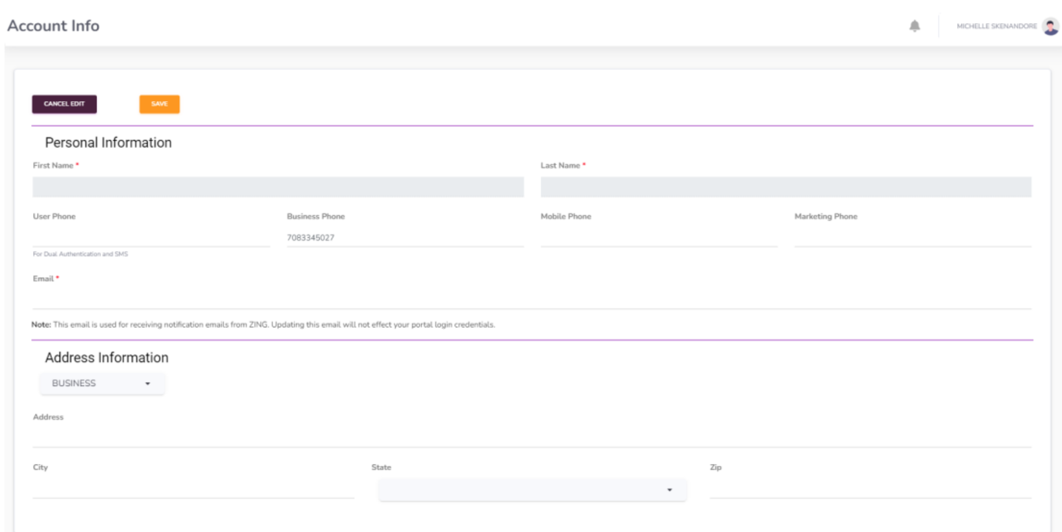
Here you can update your personal information that is shared with us like your email, phone numbers, and address.

To update your information, select Edit Account Information.

Note: To change your legal name or your email associated with your portal login, you will need to contact a health plan representative.



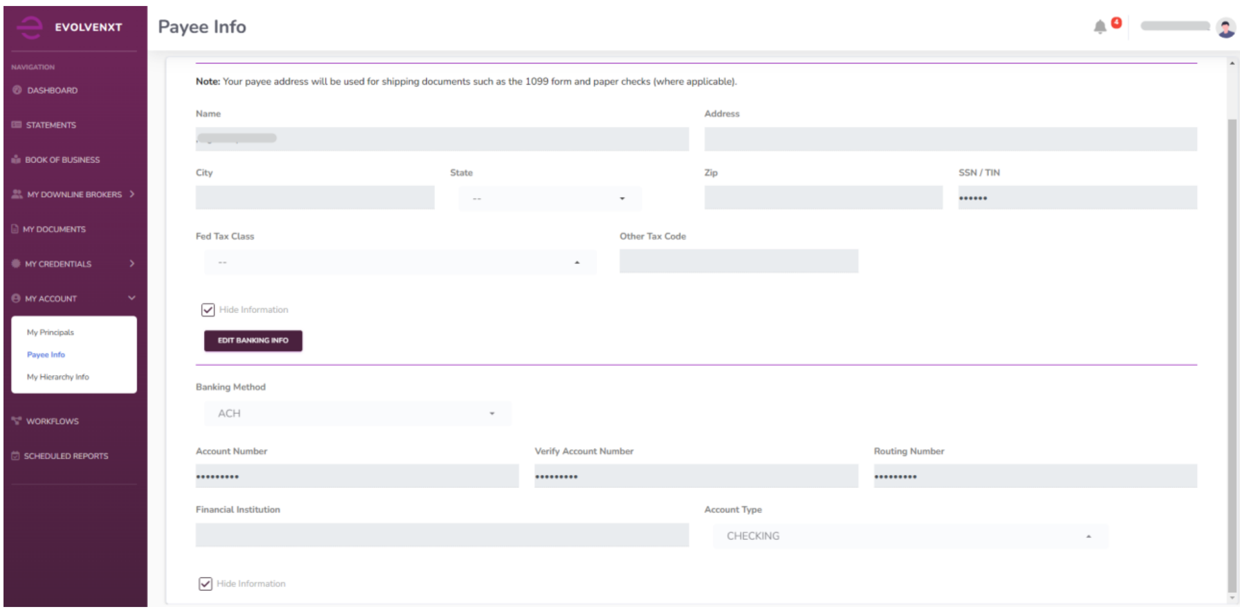
Once you've made your edits. Make sure to hit SAVE to ensure changes are captured.



8.2 Payee Info

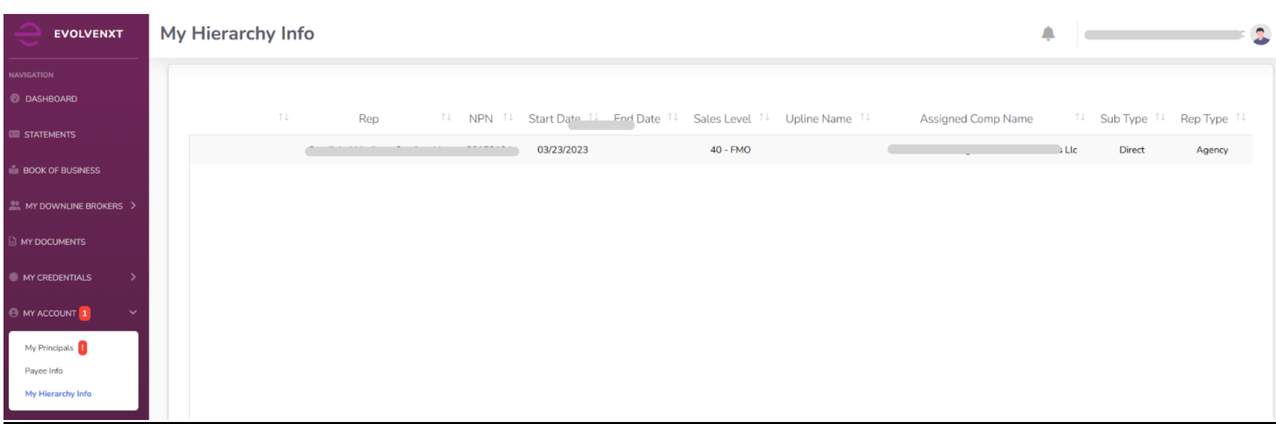
The Payee Info tab captures the name and address on file for payment. Select the Edit Payee Info tab to update the name or address. The 1099 that will generate will match the information on this screen.

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. Additionally, if you are a Licensed Only Agent adding your payee information will not change your current setup. You must work with your upline to make changes to your banking information.



8.3 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.



9 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.