



AGENT ONBOARDING AND CERTIFICATION MANUAL

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INTRODUCTION



Each year, the Centers for Medicare & Medicaid Services (CMS) provides Medicare Advantage Organizations (MAOs)/Part D sponsors training and testing requirements for their agents and brokers. These requirements include Medicare Basics, FWA and Plan Specific Product training. Agents are also required to maintain active license status and stay up to speed on ATRIO Health Plan policies.

ATRIO Health Plans utilizes EvolveNXT to deliver our annual onboarding and certification. We have designed a streamlined and simple process to get you certified and ready to sell ATRIO Health Plans.

The program includes ensuring current agent information is on file, how you would like to be paid, license and appointment verification, background check, Medicare Certification and Errors & Omissions upload, and ATRIO Health Plans product training and exam.

We have created this manual to help guide you through the process step-by-step.

CERTIFICATION EMAIL AND LINK



Existing users will see their dashboard upon logging into your EvolveNXT portal. Your home screen/dashboard consists of several useful widgets including: Quick Links, Credentials, Book of Business Birthdays, and Enrollment activities. The navigation bar on the left guides you to the different sections of your portal.

Dashboard

NAVIGATION

- DASHBOARD
- BOOK OF BUSINESS
- APPLICATION STATUS
- ENROLLMENT & FORMS >
- LMS
- DOCUMENTS & RESOURCES >
- MY STATUS & CREDENTIALS
- MY ACCOUNT >

Quick Links

Link	Description
Agent Training Calendar	Agent Training Calendar
2022 Benefit First Look	2022 Benefit First Look
ATRIO Health Plans Website	ATRIO Health Plans Website

[More Links](#)

My Credentials

Broker Status: **Suspended - Pending State License/Training**

State Licenses: **0 Active | 0 Expired**

[View Details](#)

Birthdays **582**

[View Details](#)

New Enrollments

Newly enrolled members within the past 12 months

Month	Newly Enrolled Members
September	30
October	20
November	25
December	20
January	450
February	60
March	40
April	55
May	45
June	45
July	45
August	25

Medicare Book of Business

Total Book of Business over time within the past 12 months

Month	Total Book of Business
Sep	5400
Oct	5450
Nov	5500
Dec	5550
Jan	5950
Feb	6050
Mar	6150
Apr	6250
May	6350
Jun	6450
Jul	6550
Aug	6600

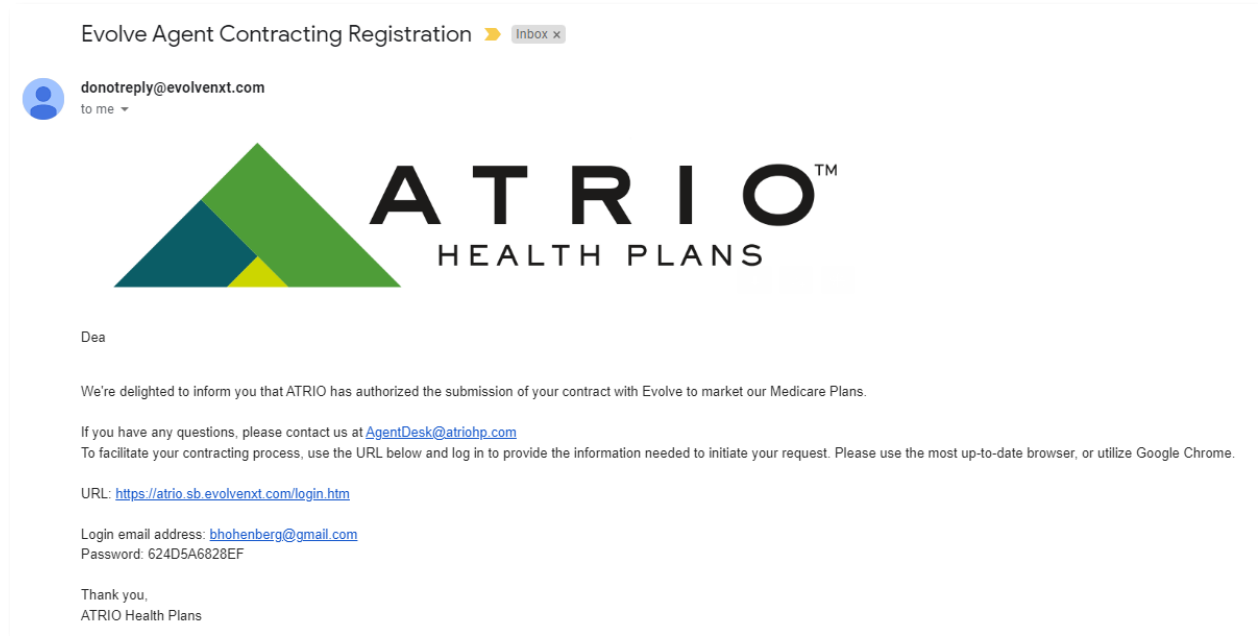
CERTIFICATION EMAIL AND LINK



The process begins with the delivery of an Onboarding and Certification email from ATRIO Health Plans.

The email will be coming from donotreply@evolvenxt.com

Click on the URL to begin the certification process.



MY CERTIFICATION CASES



Existing users will access their new ATRIO certification case by clicking “My Credentials” in the left hand navigation bar. Then select “My Certification Cases”. The red “1” lets you know you have a new notification in that section.

Agents that are new to ATRIO and Evolve will need to complete the initial certification. Your screen will only show the “My Certification Cases” option.

Click Start/Continue to access your certification.

My Certification Cases

Search by Name: _____

Name	LOB	Year	Type	NPN	Sales Level	Affiliated Agency/Team	Submitted By	Creation Date	Status
218 INSURANCE PARTNERS	Medicare Advantage	2023	Recertify	20179410	Broker		Jessica W.	08/09/2022	Unsubmitted - Contract Info

Showing 1 to 1 of 1 entries

FIRST PREVIOUS 1 NEXT LAST

My Certification Cases

Search by Name: _____

Name	LOB	Year	Type	NPN	Sales Level	Affiliated Agency/Team	Submitted By	Creation Date	Status
Brandon Helbig	Medicare Advantage	2023	Initial	18699774	Broker		Brandon H.	08/05/2022	Created - New

Showing 1 to 1 of 1 entries

FIRST PREVIOUS 1 NEXT LAST

MY CERTIFICATION CASES



You will be prompted to verify your NPN and SSN which validates against the info we pull from NIPR.

Once you enter your info, click “Validate”.

A screenshot of the ATRIO Health Plans web application. The page title is "My Certification Cases". A navigation sidebar on the left contains the ATRIO logo and "MY CERTIFICATION CASES". The main content area is partially obscured by a white modal window titled "Before You Begin...". The modal contains a form with the following fields: NPN (18699774), First Name (Brandon), Last Name (Helbig), and SSN (empty). A red error message "This field is required." is displayed below the SSN field. A green "VALIDATE" button is at the bottom of the modal. The background shows a blurred view of the main page with a top navigation bar and a user profile for "BRANDON HELBIG".

My Certification Cases

NAVIGATION
MY CERTIFICATION CASES

Before You Begin...

For the security and protection of the data that was pulled from the National Insurance Producer Registry (NIPR), we require that you enter your Social Security Number/EIN (Taxpayer ID) to validate that you are the entity listed below:

NPN 18699774

First Name Brandon

Last Name Helbig

SSN

Do not include hyphens nor spaces

This field is required.

VALIDATE

BRANDON HELBIG

CONTACT INFO



Next you will enter your contact info. Existing users will have your info already populated.

Broker Type and Upline information are carried over from your previous year information or set when creating your initial onboarding link.

Please read to ensure your information is listed correctly. This is how you will elect to be paid.

If your info is incorrect, click “Abort” and reach out to agentdesk@atriohp.com for assistance.

If your info is correct, check the box and click “Continue”

My Certification Cases

CONTACT INFO PAYMENT LICENSE INFO DOCUMENTS TRAINING SUBMIT

Address 1 *
Address 2
City *
State *
Zip Code *

Broker Information

Broker Type: Field Broker

Upline Information

LOB: Medicare Advantage
Sub Type: Direct
Sales Level: 01 - Broker
Next Upline:

You are onboarding as a 1099, Direct to ATRIO Health Plan. This means that you do not have an upline and you will receive your own commissions. Your commissions cannot be assigned to another contracted entity and you will have to complete banking information for payment. After you are Active/Certified, you will have the ability to request to join a hierarchy and assign commissions to this entity. If this is not the model you wish to onboard as, please click the Abort option below and request a new invitation from your preferred hierarchy or agency.

ABORT CONTINUE

PAYMENT



Those agents being paid commissions directly by ATRIO will be prompted to enter (or verify for existing users) payment information.

If you want to declare a private company to be your payee or DBA, you can select this option here and add the information needed to populate your W9.

The screenshot shows the 'My Certification Cases' page on the ATRIO Health Plans website. The 'PAYMENT' tab is selected. The form contains the following sections:

- Payee:** A text area with a warning message: "You are eligible to declare a private company, that you legally represent or own, to be your payee. This means that any money earned is paid to the Tax ID of this company. It also means that the 1099 tax form issued to you will be in the name and Tax ID of this company. If you chose to declare a payee, you will be prompted to sign a W9 form for your declared company payee. If you chose to not declare a company as your payee, then you will be the payee on record. This means that the 1099 tax form issued to you will be in your name and SSN. You will be prompted to sign a W9 form with your information." Below this is a dropdown menu with "No" selected.
- Banking Information:** A section with several input fields:
 - Payment Method: ACH (Direct Deposit)
 - Account Type: Checking
 - [7] Account Number: [Redacted]
 - Verify Account Number: [Redacted]
 - [7] Routing Number: 234523455
 - Financial Institution: Big Bank

At the bottom of the form are two buttons: "ABORT" (red) and "CONTINUE" (teal).

LICENSE INFO



Next, you will select the states in which you wish to sell ATRIO plans for the upcoming year.

All states in which ATRIO is offered and you have an active license will show as a selectable option.

A screenshot of the ATRIO web application interface. The page title is "My Certification Cases". On the left is a dark teal navigation sidebar with the ATRIO logo and "MY CERTIFICATION CASES" selected. At the top right, there is a user profile for "BRANDON HELBIG" and a notification bell icon. Below the navigation is a horizontal menu with tabs: "CONTACT INFO", "PAYMENT", "LICENSE INFO" (which is highlighted in dark teal), "DOCUMENTS", "TRAINING", and "SUBMIT". The main content area is titled "License Information" and contains the following text: "The licenses shown below reflect active licenses you hold in states where Wellcare offers Medicare Advantage and/or Prescription Drug plans. Please elect licenses where you plan to market / sell Wellcare products. Please note, you will be able to update your elections within your portal at any time. Your Resident State License is automatically selected." Below this text is a single selectable option: a checkbox followed by "OR - Oregon", which is currently checked. At the bottom of the form are two buttons: a red "ABORT" button and a dark teal "CONTINUE" button.

DOCUMENTS



Next, all agents will be required to upload their current E&O insurance. Just the declaration page is required.

You are also required to upload your Annual Medicare Certification. Here you will upload the certificate from AHIP/NAHU/Gorman Health Group.

Click the blue boxes to open the document upload popup.

.pdf, .jpeg, .img file types will work

The screenshot shows the 'My Certification Cases' page in the ATRIO Health Plans system. The page has a dark teal sidebar on the left with the ATRIO logo and navigation options: 'NAVIGATION' and 'MY CERTIFICATION CASES'. The main content area is titled 'My Certification Cases' and features a horizontal menu with tabs: 'CONTACT INFO', 'PAYMENT', 'LICENSE INFO', 'DOCUMENTS' (which is highlighted in dark teal), 'TRAINING', and 'SUBMIT'. Below the menu, there is a red warning message: 'Please ensure you upload at least 1 file per each required type.' This is followed by a section for 'Required documents:' with a bulleted list: 'Current E&O Certificate' and 'Annual Medicare Certification Accepted AHIP/NAHU/Gorman'. Below this, it states 'All other documents shown, if any, are optional uploads. TO UPLOAD A SPECIFIC FILE TYPE, CLICK ON THE CORRESPONDING BOX.' There are two sections for document management: 'Uploaded Documents' (currently empty with the text 'No documents loaded.') and 'Add Document(s)'. The 'Add Document(s)' section contains two blue boxes with 'UPLOAD' text and arrows. The first box is labeled 'Current E&O Certificate' and the second is labeled 'Annual Medicare Certification Accepted AHIP/NAHU/Gorman'. At the bottom of the page, there are two buttons: a red 'ABORT' button and a dark teal 'CONTINUE' button. In the top right corner of the page, there is a notification bell icon and a user profile for 'BRANDON HELBIG'.

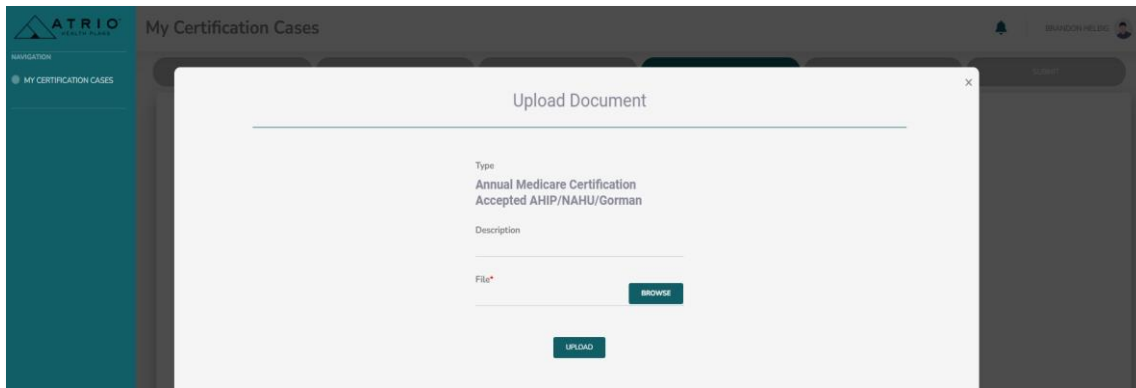
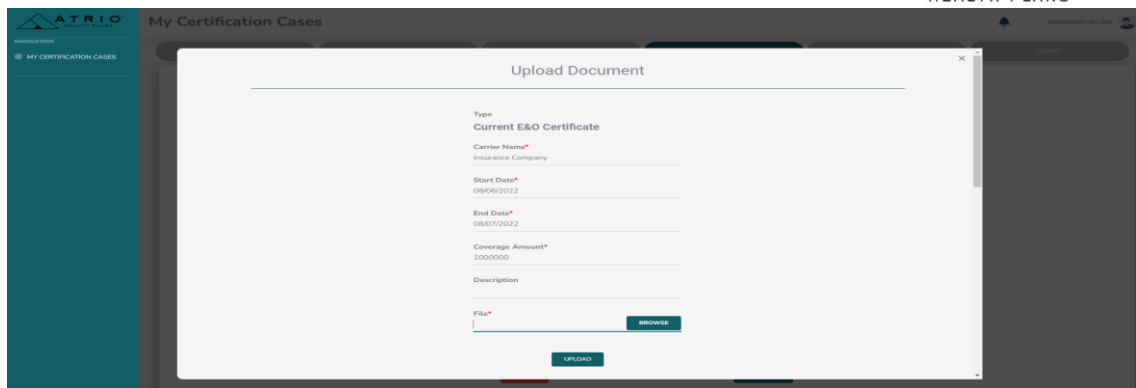
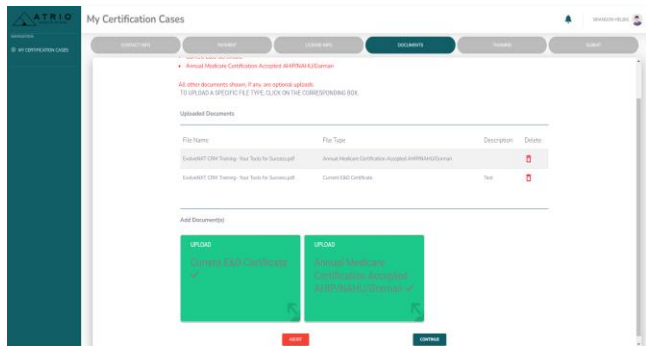
DOCUMENTS

When uploading the E&O, you will need to key in your Coverage, Start and End Date, and Coverage amount.

Click Browse, select the file, and upload.

Follow the same process for uploading your Medicare Certificate.

When both have been uploaded, you will see the green boxes below.



TRAINING



After uploading your documents, you will move on to the ATRIO Health Plans product training course.

Click “Take Training” to begin. You will have the option to download the material as well as scrolling through the presentation.

The exam is 20 questions. You have 3 attempts to pass the exam with an 85% or better.

Once your status shows as “Passed” you will be able to continue.

My Certification Cases

NAVIGATION
MY CERTIFICATION CASES

CONTACT INFO PAYMENT LICENSE INFO DOCUMENTS **TRAINING** SUBMIT

Training Information

Available Trainings

Training Name	Training Type	Status
Atrio Training	Product	Incomplete

Component Name	Started	Completed	Score	Pass / Fail
Atrio Certification				

TAKE TRAINING

ABORT

My Certification Cases

NAVIGATION
MY CERTIFICATION CASES

CONTACT INFO PAYMENT LICENSE INFO DOCUMENTS **TRAINING** SUBMIT

Training Information

Available Trainings

Training Name	Training Type	Status
Atrio Training	Product	Passed

Component Name	Started	Completed	Score	Pass / Fail
Atrio Certification	08/05/2022 04:23 PM PDT	08/05/2022 04:31 PM PDT	45.00	Failed

Component Name	Started	Completed	Score	Pass / Fail
Atrio Certification	08/05/2022 04:31 PM PDT	08/05/2022 04:39 PM PDT	100.00	Passed

RESULTS

RESULTS

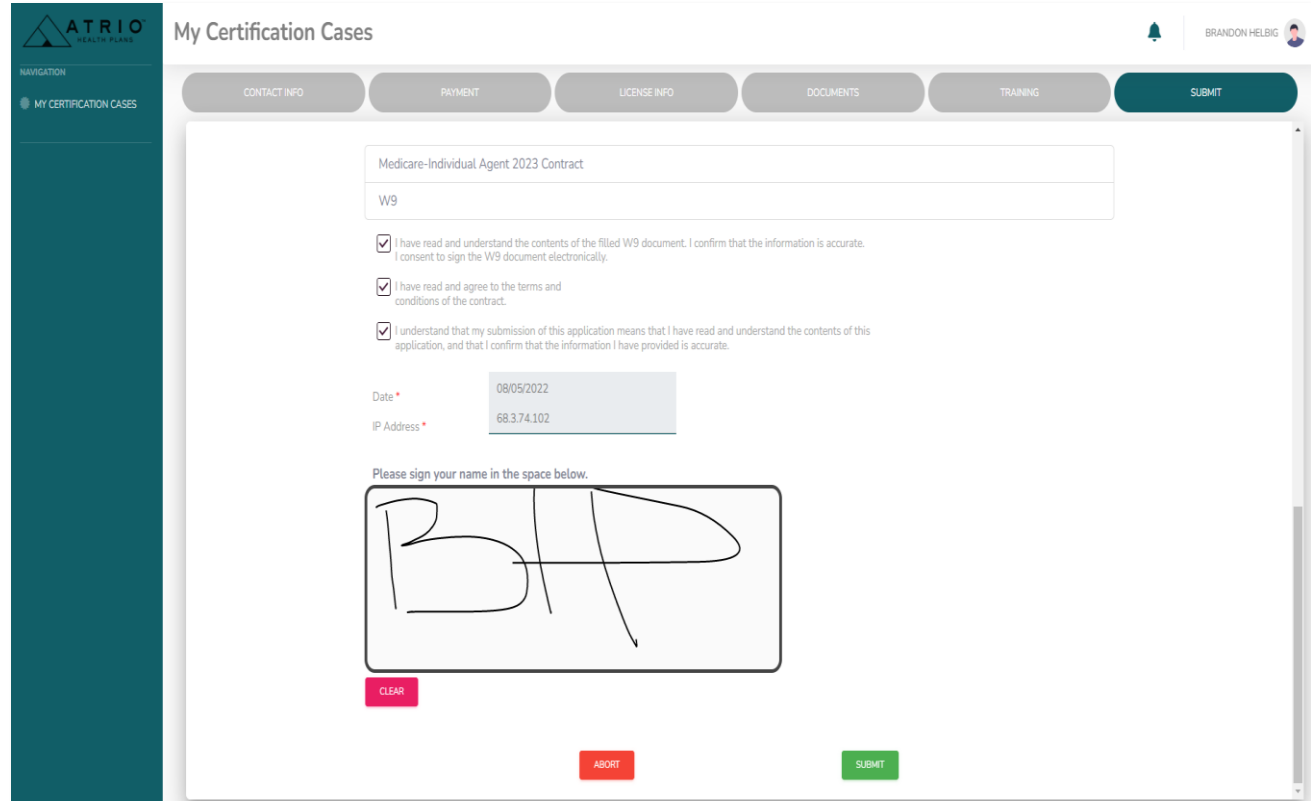
ABORT CONTINUE

SUBMIT

The final step will present you with our ATRIO Health Plans Agent Contract and your W9 which has been populated with the information you entered on the Payment step.

You can open and read both documents by clicking on them.

You will then check the boxes and sign on the screen as shown.



ATRIO HEALTH PLANS

NAVIGATION

MY CERTIFICATION CASES

My Certification Cases

CONTACT INFO PAYMENT LICENSE INFO DOCUMENTS TRAINING SUBMIT

Medicare-Individual Agent 2023 Contract

W9

- I have read and understand the contents of the filled W9 document. I confirm that the information is accurate. I consent to sign the W9 document electronically.
- I have read and agree to the terms and conditions of the contract.
- I understand that my submission of this application means that I have read and understand the contents of this application, and that I confirm that the information I have provided is accurate.

Date • 08/05/2022

IP Address • 68.3.74.102

Please sign your name in the space below.

B. Helbig

CLEAR ABORT SUBMIT

NEXT STEPS



Once submitted, you will see a “Submission Successful” screen where you have the opportunity to download copies of both your contract and W9.

Your case has been submitted to ATRIO staff for review and background check processing. Please allow 1-2 business days for review.

Once, accepted you will receive a confirmation email letting you know you are ready to sell ATRIO Health Plans for both current and next plan year.

The screenshot shows the 'My Certification Cases' dashboard in the ATRIO Health Plans system. The dashboard has a dark teal sidebar with the ATRIO logo and navigation options. The main content area is white and displays a 'Submission Successful' message. The message includes a thank you note, instructions to download signed documents, and a confirmation that the user will become Active/Certified once requirements are met. There are two download links: 'Download W-9' and 'Download Contract'. Below the message is a table with user information.

Field	Value
Broker Name	Aaron Burns
Email	bhohenberg@gmail.com
NPN	9156077

HAVE QUESTIONS?

Contact ATRIO Agent Support at 541-492-2166
or AgentDesk@atriohp.com