

Agency & Agent Onboarding in Sentinel Elite

Congratulations on successfully contracting with Clover!

To complete the onboarding process, please complete the following steps to ensure:

- We can quickly and easily complete the Agency Onboarding process
- All downline agents are successfully appointed with Clover
- Clover can accurately assign your downline agents to your agency to ensure accurate AEP and pre-AEP reporting as well as commissions payments in 2019

Required Actions by New Agencies:

1. **Share Agency admin info.** Share the name and contact information of your Agency's Admin/Operations lead. This will be the point-person with Clover to kick off all future onboarding and appointment processes.
2. **Work with Clover's Sales Operations team to setup Agency and Agent Onboarding.** Clover's Sales Ops team will reach out to your designated Admin/Ops lead to begin the process:
 - Collecting your Agency Principal's name, NPN, and Social Security Number (for registration with Sentinel Elite)
 - Sharing the "Agent Upload List" form so that you can provide the list of your contracted, downline agents for appointment with Clover. This form is a Google Sheet and will require that you use a Gmail-backed email address in order to access (setup help [here](#))
 - Outlining the remainder of the process once your Agency is onboarded, which involves uploading your downline agents into Sentinel Elite and helping them work through the Clover 2019 appointment program.
3. **Complete Agency Onboarding program.** Clover's Agency Onboarding program is a short, four-step program that requires you to:
 - Enter key administrative and financial info for your agency to ensure we can complete commissions payments on time
 - Upload proof of E&O coverage as defined in our contract
 - Upload a signed copy of your 2019 FMO agreement with Clover (we can provide a copy to you if necessary)
 - Select the states that your agency is licensed in. You will not need to provide a copy of your licenses, simply select the correct states and SE facilitates the license checks.
4. **Contract your downline agents.** Based on your FMO Agreement with Clover, contract your downline agents on either an LOA or a contract you have drafted.
5. **Provide a list of your contracted downline agents for upload into Clover's 2018/2019 Appointment program in Sentinel Elite.** Via the process outlined above, share the list of your contracted downline agents with Clover, including the following information:
 - First and Last Name
 - NPN
 - Social Security Number
 - Email

- Primary Selling Market (Clover to provide; for reporting purposes only)
- Past FMO (if transferring from another FMO)

6. **Allow Clover to upload your agents and notify them that their program is ready to complete.** Once you have shared the list of agents with data points outlined in Step 5, Clover's Sales Ops team will upload into Clover's 2018/2019 Certification program. Once uploaded, Clover will notify you that the list of agents have been entered into Sentinel and can work with you to notify agents to login and begin their program. If you would prefer to contact agents directly, Clover can provide a template email for you to share. A quick summary for agents includes:

- Go to www.sentinelelite.com and either login or register as an agent
- Verify that your "Group" matches the FMO that you believe you are currently contracted under (note: you can only be contracted under ONE FMO at any time)
- Complete the "Clover Health 2019 FMO Core Certification" program listed on your Dashboard
- Once the "Core Certification" is completed, agents will automatically be asked to select the states in which they plan to sell Clover in 2019. Clover will cover the appointment cost of the first state but agents are responsible for the \$26 appointment fee for every subsequent state.
- Agents will become Ready to Sell (RTS) with Clover in a given state once they have fully completed the State-based training and pass a license check facilitated by Sentinel. Once RTS, agents will receive an email notifying them that they are RTS in a given state. Until they receive this email, agents are NOT Ready to Sell (RTS)!

**** Please also indicate if there are any downline contracted agents that you do not want to see their commissions information in our broker portal! This would apply only to any employed/captive agents that do not follow the traditional commissions schedule, for example.****

7. **Recruit agents to our F2F sessions.** Clover strongly encourages, though does not require, a Face-to-Face (F2F) training session in order for agents to become appointed with Clover. The goal of the F2F sessions is to share Clover's story, our value proposition, and what makes us different from other carriers. We have found that attendance at F2F sessions drives higher agent productivity and better Compliance scores. For this reason, we strongly encourage all agents and agency leads to attend! For agents that cannot attend the F2F, Clover will also offer webinars as a substitute.

Clover asks that you recruit your contracted agents to attend a local F2F session in their area. Please inquire at brokers@cloverhealth.com or using this number 1-855-979-2236 to obtain a calendar of events in each of the markets you cover. During the F2F events and webinars, we ask each agency to collect the required data points from attending agents so that we can load them into our appointment tool.

8. **Ensure agents complete appointment process.** Within 72 hours of agent files being submitted, your agents will be able to log into Gorman by visiting www.sentinelelite.com and using their NPN to view their agent dashboard. Once on the dashboard page, they will be able to begin completing the "Clover Health 2019 FMO Core Certification" link waiting for them there.

As a reminder, agents are not RTS until they receive a confirmation email from Clover that they are RTS in a given state. The agent can also view their ready to sell status in the right hand side of their dashboard. See sample below:

READY TO SELL					
Plan	Contract Name	Contract #	State	Benefit Year	Effective
Clover / CarePoint Health of New Jersey	Clover Health	H5141	GA	2018	10/23/2017
Clover / CarePoint Health of New Jersey	Clover Health	H5141	NJ	2018	10/11/2017
Clover / CarePoint Health of New Jersey	Clover Health	H5141	PA	2018	10/13/2017
Clover / CarePoint Health of New Jersey	Clover Health	H5141	TX	2018	10/13/2017

- Clover shares appointment status.** Each Friday, Clover will share a file indicating the appointment status of each of your downline agents working through the appointment process. Closer to AEP, we will share this file more frequently. Once an agent is confirmed RTS for 2019 in a given state, they will be able to market and sell Clover plans for both 2018 and 2019.