

From: [Broker Support - Agent Pipeline](#)
To: [Rachael Fizer](#)
Subject: Fw: Please save to Server and update Reference guide
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From: Gregory Lutz <gregory.lutz@agentpipeline.com>
Sent: Thursday, June 10, 2021 2:47 PM
To: Broker Support - Agent Pipeline <brokersupport@agentpipeline.com>
Subject: Please save to Server and update Reference guide



Hello,

Our PY2022 Onboarding is now available in our Agent Portal! Our goal is to keep our onboarding experience easy and allow agents to complete the process in a few simple steps. We are super excited about the upcoming selling season and look forward to working closely with you.

PY2022 Onboarding & Certification Process

It's time to start our onboarding process for your downline. You can invite your agents to complete our onboarding process today, then come back to complete their certification when it is available around June 22. Agents will receive an email inviting them to log back into Agent Portal to complete our PY2022 certification.

NOTE: All agency administrative fees (overrides) will be paid directly to your agency based on the information you provided in our Devoted Agreement.

For Medicare enrollments, Devoted will pay producing agents commissions one of two ways:

1. Pay the agency (Indirect Payee)
2. Pay agents directly (Direct Payee)

Your Agency's Commission Type

INDIRECT PAYEE

Your agency is paid on behalf of your agent commission. You are responsible for compensating your agent for Devoted Medicare enrollment.

DIRECT PAYEE

Agents are paid directly by Devoted Health.

Our Onboarding & Certification Process

- Account creation for Devoted Health's Agent Portal
- W-9 & Direct Deposit (*Direct Payees only*)
- Agent Questionnaire
- Code of Conduct Acknowledgement
- Agent Agreement
- Background Check Consent
- Core Medicare Training or equivalency upload (AHIP or Pinpoint)
 - CMS Fraud, Waste & Abuse & Compliance Training
- Devoted PY2022 Certification Training & Exam
 - Agents will have 3 attempts to pass the training exam with a minimum score of 85% (If the agent is unable to pass within 3 attempts, they will need to certify for PY2023)
 - Each time the exam is opened (initiated) it will count as an attempt and must be completed in one sitting (~30 min).
- License Check
- Appointment

The agent's progress will be saved if they cannot complete the certification all at once — they will be able to continue at a later time with the exception of the Devoted training exam.

What happens once the appointment process is complete?

Once the appointment process for the agent's respective state(s) is complete, they will receive an email notification that they're "Ready to Sell" (RTS) for PY2022 and PY2021*. Agents cannot market or sell Devoted Health benefits until they receive this email.

**PY2021 certification only available for AZ, FL, TX, OH. IL is PY2022 only.*

How to Get Started

For agents who are interested in contracting with Devoted for PY2022, please follow these important steps:

1. Your agent is identified as a **DIRECT Payee**.
2. Copy and paste the appropriate template below into a NEW email and send it to your downline agent. **DO NOT share this entire email with agents in your downline.**
3. Monitor your agents onboarding/certification status in our Agent Portal.

Hello!

Thank you for your interest in contracting with Devoted Health Plans. We have top doctors, cutting edge technology, and personalized care teams that help us provide high quality healthcare to our members. We're on a mission to make healthcare better — [learn more](#) about the Devoted Health Difference! We are excited to partner with you and look forward to working together.

Your Commission Type

DIRECT PAYEE

This means your enrollment commission will be paid directly to you by Devoted Health.

You must hold an active health insurance license, be contracted, certified, and appointed before you can market Devoted Health PY2022 benefits.

How to Access the Agent Portal

1. Create an Account (Existing Agents: log into your existing account)
2. Complete Onboarding
3. Start the Certification Process

Create an Account

Important Things to Know

- If you have completed the Core Medicare trainings, we accept AHIP or PinPoint certificates. If not, you can now complete the AHIP training by using the link in our onboarding workflow and get a \$50 discount.
- The 2022 Agent Certification & Exam informs you on how to compliantly market Devoted Health benefits and satisfy the annual CMS Medicare Compliance Program requirements.
- To receive renewals for business sold in prior years, you must be licensed and appointed to sell Medicare products per state laws and recertified annually.
- Completing the PY2022 Certification will also allow you to market PY2021 benefits in our current service areas (Arizona, Florida, Ohio, and Texas only).
- A face-to-face certification is not required.
- For more guidance, please refer to the [Devoted Health Agent Portal Quick Start Guide](#) or visit us at www.devoted.com/brokers

Questions?

Contact us at 1-877-764-9446 or email us at agent-support@devoted.com. You can also contact your local [Devoted Sales Leader](#).

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