

Devoted Health Agent Portal Quick Start Guide

The **Devoted Health Agent Portal** is built from the ground up to make selling Devoted quicker and easier!

The Basics

What's in it for you?

- The best online application experience for selling Devoted plans
- One place to view all your Devoted business and monthly commissions statements
- Links to essential tips, advice, and other resources for selling Devoted
- Digital signature workflows for Scope of Appointment and other forms

Plus, the portal will eventually become your one-stop shop for all agent activities. For those of you who sold with us in the past, the portal replaces Connecture and Evolve (your log-in will still work to access historical commission statements).

When can I access the Portal?

If you're **Ready to Sell** with Devoted, you'll be receiving an invitation to access the Agent Portal soon.

How do I log in?

The first time you log in, look for an email in your account with the subject line of "Devoted Agent Portal Log-in Details". This email includes an invite link that you can click to create a password for your account. Your username is your NPN number.

After that, you can access the portal at any time by going to [Devoted Health](#) and entering your username and password.

Help! I forgot my password

Forgot your password? No problem! Just go to <https://agent.devoted.com/>, click Login, then click "Don't remember your password?" Enter your email and hit the "Send Email" button. You'll receive a message in your Email inbox with a link - click it to create a new password and sign into the portal.

What can I do in the portal?

As an individual agent, you can access the following tools within the Agent Portal:

- From the **Home Page**, you can check your Ready to Sell status and access important sales tools, training, support, and education resources
- Send out a digital **Scope of Appointment** forms via email for Digital Signature

- Quickly create and submit a new **Enrollment Application** online, whether you're in person with a prospective member or on the phone
- Check the status of all your **Devoted Clients** in one place - including application tracking, enrollment status, member effective and end dates, and member IDs
- Access your monthly **Commissions** statements, and download a PDF or spreadsheet. Commission statements are released by the end of each effective month (e.g. for 1/1 effectives you will receive commissions at the end of January).

As an agency admin, you can access these features in the Agent Portal:

- A summary of all your active downline agents, including NPN, RTS status by state and application activity, in the Agents page
- Visibility into each downline agent's book of business from the Clients page
- Monthly commissions statements for payments made directly to your agency in the Commissions tab

Note: Each agency is provided one admin account. The username is the agency NPN, unless otherwise specified for your account, and the password is set when on the first login. Admin accounts are limited to read-only access in the Agent Portal, meaning that when you are logged in to the admin account you cannot create or edit applications.

Check back often to see what features we add in the future - we'll be updating and improving your portal experience frequently!

Tips and Tricks

Managing Your Clients

You can quickly see all of your Devoted clients from the Clients page. This list will show the client name, phone number, plan, effective date, end date (if applicable), member ID and status.

- **Sorting the list.** You can sort the table by clicking on the triangles to the right of the column name. Only columns with the triangles are sortable. Click the triangles once to sort in ascending (A→Z) order, or click twice to sort in descending order (Z→A)
- **Filtering the list.** You can filter the list by Status and Plan Type using the dropdowns below the search box. Check off all of the options you want included in your results, then click the orange "Apply" button. Click the "Clear" link in the dropdown to clear the filter selections.
- **Searching the list.** You can search by name or phone number using the search box at the top of the page. Type your search term in the box, then click the magnifying glass button to the right of the box. To clear your search, delete the search terms and click the magnifying glass button.

Note: The Client page shows a list of *applications*. If a client has multiple applications, each application will appear as a separate row in the list.

Understanding Client Statuses

There are 9 client statuses in the Portal (hover your mouse over the status in the Portal to view definition; if you're on a tablet you can click the status):

- **Draft:** The application has been started but has not yet been submitted to Devoted Health. You may continue to edit the application.
- **In Review:** The application has been received by Devoted Health and is being reviewed for eligibility.
- **Submitted:** The application has been received by CMS.
- **Withdrawn:** The application has been cancelled prior to being submitted to CMS.
- **Approved:** The application has been approved by CMS and the member's effective date is in the future.
- **Denied:** The application has been denied by CMS.
- **Cancelled:** The application was approved by CMS, but the member cancelled enrollment prior to the effective date.
- **Enrolled:** The member is currently enrolled.
- **Disenrolled:** The member is currently disenrolled.

Creating an Application

You can quickly create an Application from Portal by clicking the "Start enrollment" button in the orange header at the top of the page. Once you've filled out the **Create Contact** page, click the orange "Start Application" button to complete the enrollment application.

Submitting an Electronic Scope of Appointment (SOA)

You send an applicant a Scope of Appointment form in a few different ways:

- From the Clients page, click on the client's name. Click the SOA tab on the contact banner, and choose the Email SOA as the method to send your contact an email with a link to complete an electronic version of Devoted's SOA form.

Choosing a Plan

On the **Plan** page of the Application, enter the plan year and applicant's zip code to quickly filter down the list of Plans to quickly help you choose the correct one.

Selecting a PCP

On the **Providers** page of the Application, you can select the preferred PCP for an applicant. A few tips:

- Use the [PCP Search tool](#) on devoted.com to quickly find the best PCP for your applicant.
- Copy the PCP's NPI number from the **PCP Search tool** into the PCP field on the **Providers** page of the application, then choose the relevant office location.
- If the applicant does not have a PCP preference, click the checkbox that says "If applicant has no PCP preference, check this box and a Devoted guide will help assign one."
- *Note: if you do not select a PCP, you must click the checkbox above to proceed through the application.*

Application Signatures

On the **Sign & Submit** page, you have a number of options for documenting the applicant's signature depending on the submission method.

- *In Person Electronic:* Click the "Sign Application" button to open an Application Signature form - show this form to the applicant on your device and ask them to complete the form and sign themselves.

- *Phone, Unrecorded Line:* The applicant will need to complete a telephonic signature with Devoted; you can read the prompt displayed on the Enrollee Signature section of the page. Inform the beneficiary that because this is an unrecorded conversation, they will need to complete this step over the phone on a recorded line. Someone from Devoted Health will call them within the next 2 business days. That call will count as their verbal "signature."
- *Phone, Recorded Line:* If you're on a recorded line, you can read the content displayed in the Enrollee Signature section on the page and ask them for a verbal signature. Your call recording is proof of the applicant's signature.

Other Application Tips

- You can add multiple Enrollment Reasons on the **Health & Financials** page
- If the applicant has more than one Enrollment Reason, you can indicate the preferred Enrollment Period via the Preferred Enrollment Period dropdown on the **Application Details** page.
- The Proposed Start Date on the **Application Details** page indicates the preferred Enrollment Date of the applicant. The final Effective Date will be determined when the application is accepted by CMS.
- You can upload supporting documentation and forms via the Add File Attachment button on the **Application Details** page.
- Use the Transition Details field on the **Sign & Submit** page to let us know about any information you think will be helpful for the applicant's member onboarding.