



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 >

HOUSE 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	Count
September	25
October	20
November	25
December	20
January	450
February	55
March	40
April	55
May	45
June	45
July	45
August	20

Medicare Book of Business

Total Book of Business over time within the past 12 months

Month	Total Count
Sep	5400
Oct	5420
Nov	5450
Dec	5480
Jan	5900
Feb	5980
Mar	6050
Apr	6150
May	6200
Jun	6250
Jul	6300
Aug	6350

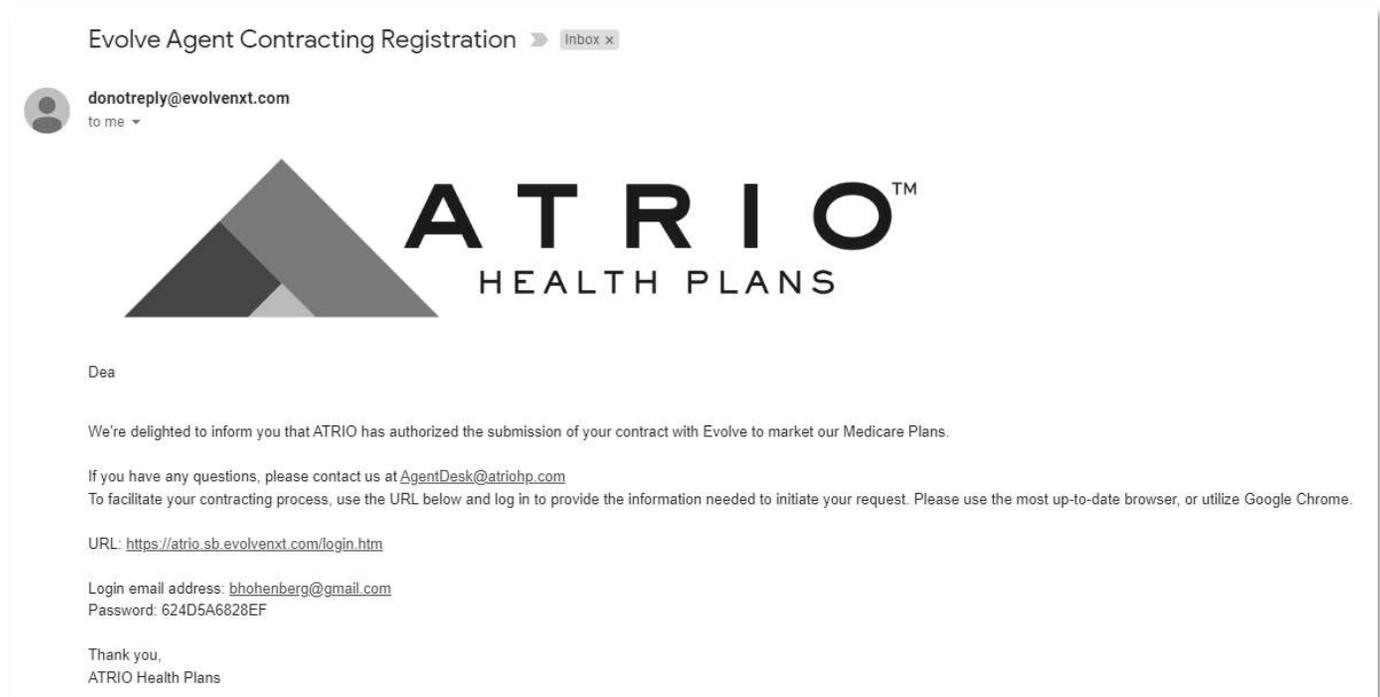
CERTIFICATION EMAIL AND LINK



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.

The screenshot shows the ATRIO user interface. The top right corner features the ATRIO logo and the user's name, "21B INSURANCE PARTNERS". The left navigation bar includes options like Dashboard, Statements, Book of Business, Payment History, Application Status, Enrollment & Forms, LMS, My Downline Brokers, Documents & Resources, My Credentials (with a red notification badge), My Account, and Workflows. The "My Credentials" menu is expanded, showing "My Certification Cases" (with a red notification badge), "Manage My Licenses", and "My Status & Credentials". The main content area is titled "My Certification Cases" and contains a table with one entry:

Name	LOB	Year	Type	NPN	Sales Level	Affiliated Agency/Team	Submitted By	Creation Date	Status
21B INSURANCE PARTNERS	Medicare Advantage	2023	Recertify	20179410	Broker		Jessica W.	08/09/2022	Unsubmitted - Contract Info

Below the table, it says "Showing 1 to 1 of 1 entries". Navigation buttons for "FIRST", "PREVIOUS", "NEXT", and "LAST" are visible, with "NEXT" highlighted.

The screenshot shows the ATRIO user interface for a new user. The top right corner features the ATRIO logo and the user's name, "BRANDON HELBIG". The left navigation bar includes options like Dashboard, Statements, Book of Business, Payment History, Application Status, Enrollment & Forms, LMS, My Downline Brokers, Documents & Resources, My Credentials, My Account, and Workflows. The "My Certification Cases" option is highlighted in the navigation bar. The main content area is titled "My Certification Cases" and contains a table with one entry:

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

Below the table, it says "Showing 1 to 1 of 1 entries". Navigation buttons for "FIRST", "PREVIOUS", "NEXT", and "LAST" are visible, with "NEXT" highlighted.

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 user interface. The page title is "My Certification Cases". A modal window titled "Before You Begin..." is displayed in the center. The modal contains a message: "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:". Below the message are four input fields: "NPN" with the value "18699774", "First Name" with the value "Brandon", "Last Name" with the value "Helbig", and "SSN" which is empty. A note below the SSN field says "Do not include hyphens nor spaces." and "This field is required." A "VALIDATE" button is at the bottom of the modal. The background shows a navigation menu with "MY CERTIFICATION CASES" selected and a user profile for "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.

My Certification Cases

NAVIGATION
● MY CERTIFICATION CASES

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

Payee

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.

Do you want to declare a private company to be your payee? *

Banking Information

Payment Method: ACH (Direct Deposit)

Account Type *: Checking

[?] Account Number: * [REDACTED]

Verify Account Number * [REDACTED]

[?] Routing Number: * 234523455

Financial Institution * Big Bank

ABORT CONTINUE

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 a web application interface titled "My Certification Cases". The interface has a dark sidebar on the left with the ATRIO logo and navigation options: "NAVIGATION" and "MY CERTIFICATION CASES". The main content area has a header with the title "My Certification Cases" and a user profile "BRANDON HELBIG" with a notification bell icon. Below the header is a horizontal menu with six tabs: "CONTACT INFO", "PAYMENT", "LICENSE INFO" (which is active and highlighted in dark grey), "DOCUMENTS", "TRAINING", and "SUBMIT". The "LICENSE INFO" tab contains the following text: "License Information", a horizontal line, and a paragraph: "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 with a checkmark and the text "OR - Oregon". At the bottom of the form are two buttons: "ABORT" and "CONTINUE".

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

My Certification Cases

NAVIGATION
● MY CERTIFICATION CASES

CONTACT INFO PAYMENT LICENSE INFO DOCUMENTS TRAINING SUBMIT

Please ensure you upload at least 1 file per each required type.

Required documents:

- Current E&O Certificate
- Annual Medicare Certification Accepted AHIP/NAHU/Gorman

All other documents shown, if any, are optional uploads.
TO UPLOAD A SPECIFIC FILE TYPE, CLICK ON THE CORRESPONDING BOX.

Uploaded Documents

No documents loaded.

Add Document(s)

UPLOAD
Current E&O Certificate

UPLOAD
Annual Medicare Certification Accepted AHIP/NAHU/Gorman

ABORT CONTINUE

DOCUMENTS

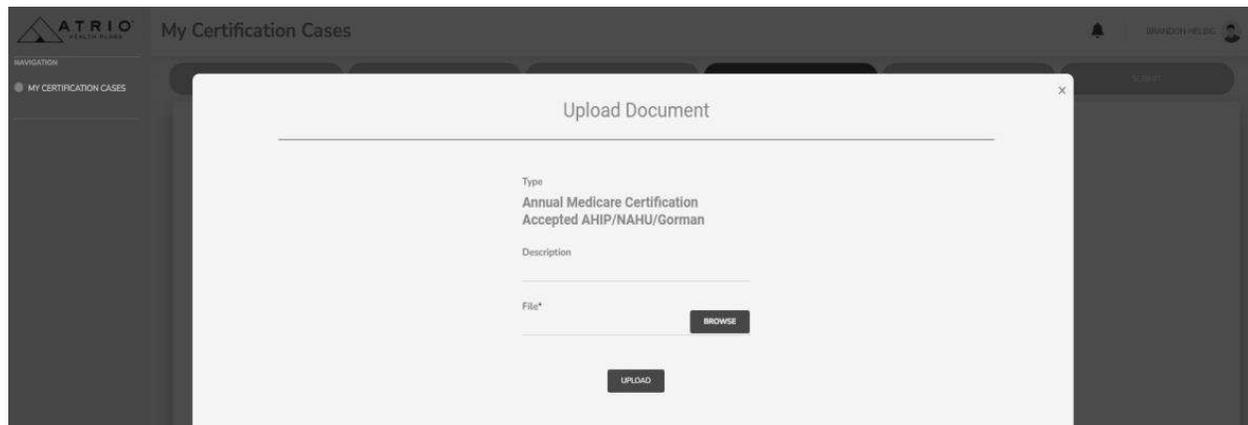
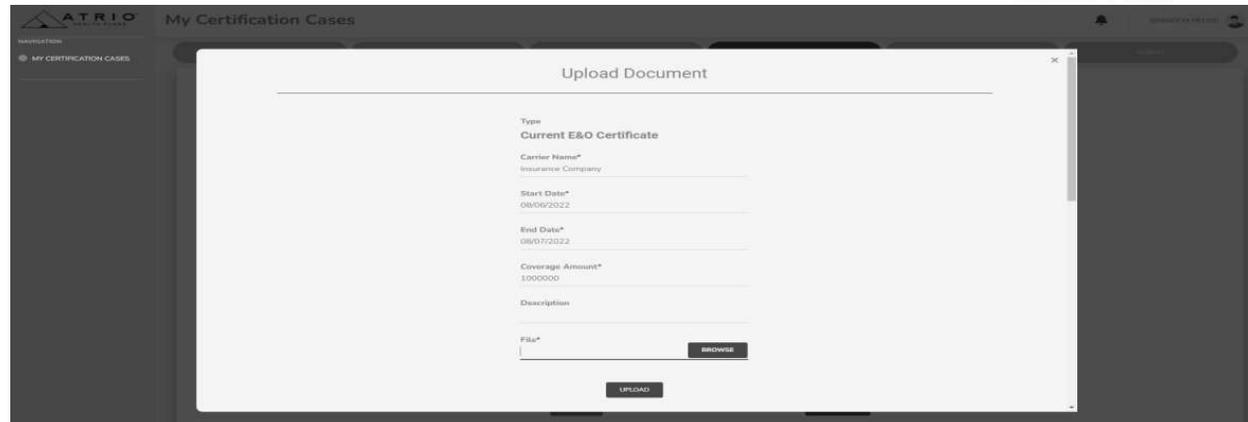
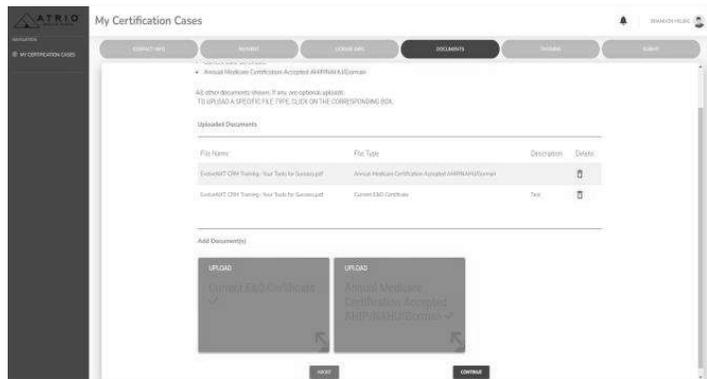


When uploading the E&O, you will need to key in your Coverage, Start and End Date, and Coverage amount.

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

Tabs: 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				

Buttons: TAKE TRAINING, ABORT

My Certification Cases

NAVIGATION: MY CERTIFICATION CASES

Tabs: 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
Atrio Certification	08/05/2022 04:31 PM PDT	08/05/2022 04:39 PM PDT	100.00	Passed

Buttons: 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.

A screenshot of the ATRIO Health Plans web application interface. The page title is "My Certification Cases". The top navigation bar includes tabs for "CONTACT INFO", "PAYMENT", "LICENSE INFO", "DOCUMENTS", "TRAINING", and "SUBMIT". The "SUBMIT" tab is currently selected. The main content area shows a form for certifying a case. It includes a text input field with "Medicare-Individual Agent 2023 Contract" and a W9 document viewer showing "W9". There are three checkboxes, all of which are checked, indicating agreement with the terms and conditions. Below these are fields for "Date *" (08/05/2022) and "IP Address *" (68.3.74.102). A signature box contains a handwritten signature "BHP". At the bottom of the form are buttons for "CLEAR", "ABORT", and "SUBMIT". The user's name "BRANDON HELBIG" is visible in the top right corner.

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.

A screenshot of the ATRIO Health Plans user interface. The page title is "My Certification Cases". The navigation menu includes "CONTACT INFO", "PAYMENT", "LICENSE INFO", "DOCUMENTS", "TRAINING", and "SUBMIT". The main content area displays a "Submission Successful!" message with the following text: "Thank you for submitting your certification workflow. Below is a copy of your signed document(s). Please download and/or print a copy for your records. Once all certification requirements are met, you will become Active/Certified and will be ready to sell." Below this text are two download links: "Download W-9" and "Download Contract". At the bottom, there is a table with the following information:

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



HAVE QUESTIONS?

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