



PY 2023
Onboarding
Guide



Clear Spring
Health



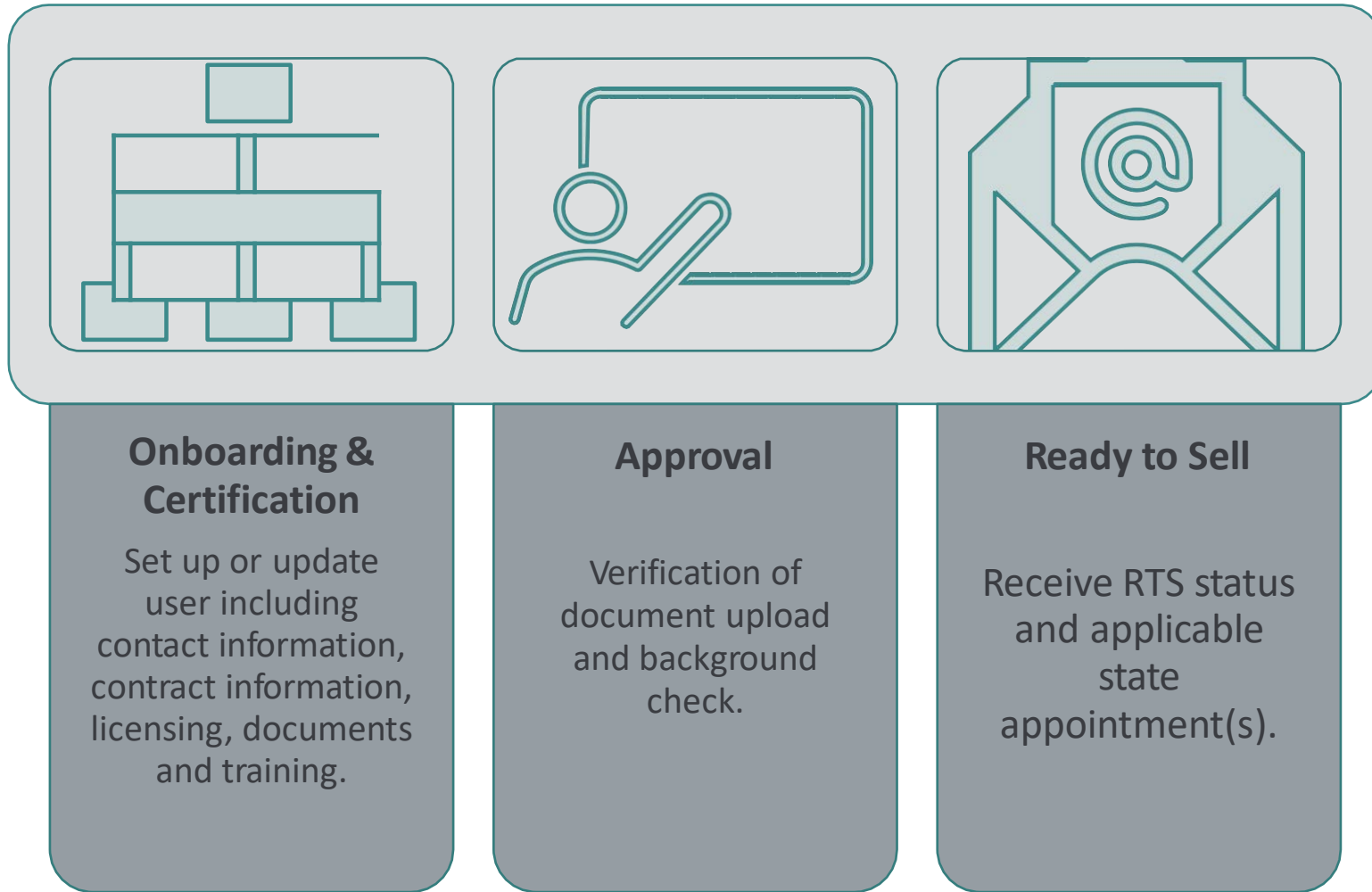
Purpose & Definitions



Purpose

- The purpose of this guide is to provide agency administrative staff and agents a step-by-step guide to on-boarding and certification with Clear Spring Health.
- Questions and/or feedback can be provided by contacting certification@clearspringhealthcare.com or calling **1-888-296-2506**.

Definitions



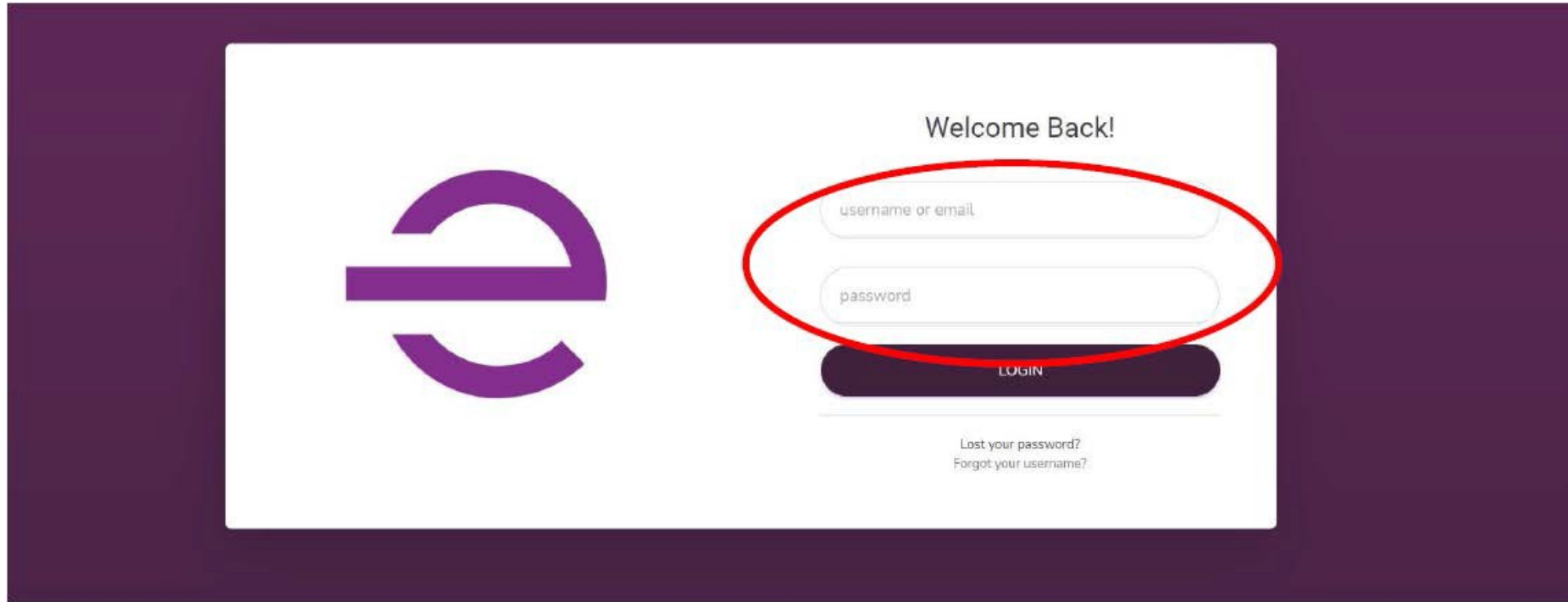


Accessing the Portal



Accessing the Portal *powered by Evolve*

- Email invitations come from certification@clearspringhealthcare.com and include a link to the Broker Portal to begin the onboarding process. Included in the email is the Username a temporary password.
- Or the URL <https://csh.evolvevxt.com/login.htm>



- In the event you need to reset your password, select [Lost Password](#) or contact certification@clearspringhealthcare.com

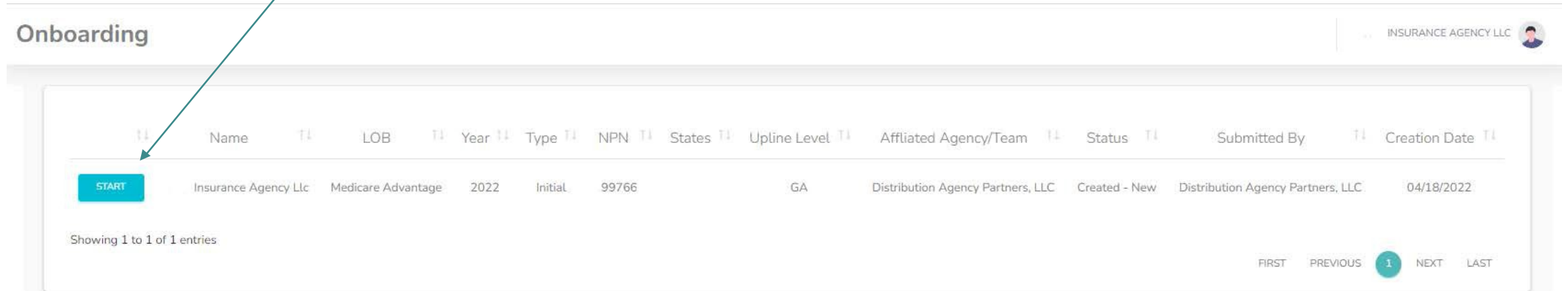


Onboarding



Onboarding Steps

- Select the link in the email to proceed with the onboarding steps. Recipients will be prompted to change the temporary password. After logging in to the Broker Portal, click ONBOARDING from the left side of the Dashboard, then click START to begin the onboarding process



The screenshot shows the 'Onboarding' section of a dashboard. At the top left, the word 'Onboarding' is displayed. At the top right, the user's name 'INSURANCE AGENCY LLC' and a profile icon are visible. Below this is a table with the following columns: Name, LOB, Year, Type, NPN, States, Upline Level, Affiliated Agency/Team, Status, Submitted By, and Creation Date. A single row of data is present, with a blue 'START' button in the first column. A green arrow points from the text in the list above to this 'START' button. Below the table, it says 'Showing 1 to 1 of 1 entries'. At the bottom right of the table area, there are navigation buttons: 'FIRST', 'PREVIOUS', '1' (highlighted), 'NEXT', and 'LAST'.

Name	LOB	Year	Type	NPN	States	Upline Level	Affiliated Agency/Team	Status	Submitted By	Creation Date
Insurance Agency Llc	Medicare Advantage	2022	Initial	99766		GA	Distribution Agency Partners, LLC	Created - New	Distribution Agency Partners, LLC	04/18/2022

Onboarding Steps – Contact Information



Fields marked with an asterisk (*) are required.

- After entering and verifying your name and SSN/TIN, please click on the 'Check NPN' box for validation. You will not be able to proceed without validating your NPN.

- The NPN displayed should match the entity or individual being onboarded. Click **CHECK NPN** to proceed to the next step.
- The EIN or SSN should match the entity or individual being onboarded.

Personal Information

Agency Name*	Johnny Rocks CSH Insurance Agency
Authorized Signer First Name*	Johnny
Authorized Signer Last Name*	Rocks
EIN/TIN*	111-22-3333
NPN*	8675309
Phone*	888-296-2506
Cell Phone	
Email*	Johnny.Rocks@noemail.com
Secondary Email	
Job Title	

CHECK NPN

<CLICK> NPN FOUND AND MATCHED

Onboarding Steps – Contact Information *(cont.)*



- Input applicable information.
- Note: Address entered here is considered the “residential” address.

Primary Address Information

Address 1*

Address 2

City*

State*

Zip Code*

Agent Information

Agent Type

Upline Information

Onboarding Steps – Contract Information



Fields marked with an asterisk (*) are required.

Contract Application

Gender * Male Female
Contract Type *
Business Phone
Business Fax
Preferred Mailing *
Cell Phone
Preferred Method of Contact *

W9 Tax Information

Taxation Type *

Business Entity Information

Business Name DBA *
Enter the officers of the contract applicant.
Officers President *
Officers Vice President
Officers Secretary
Officers Treasurer

Enter the directors or managers of the contract applicant.

Director/Manager Name Director or Manager

I declare that I am legally authorized to execute contracts and agreements on behalf of myself or the legal entity I represent. *

ABORT CASE

CONTINUE

- Input applicable information.
- Note: “Preferred Mailing” has two selections: Residential and Business.
- Selecting Residential Address will default to the primary address input in the Contact Info.
- Selecting Business Address will require entry of an address.

Onboarding Steps – Additional Info



Fields marked with an asterisk (*) are required.

If you answer "Yes" to any of these questions, please upload supporting documentation in the **Document** section of this Onboarding process.

Background Questions

- Questions are specific to the entity or individual completing the onboarding process.
- If answer "Yes" to any of these questions, please provide supporting documentation via email to certification@clearspringhealthcare.com

1. Have you been convicted of a felony? * No Yes
2. Has any legal or regulatory body ever sanctioned, censured, penalized or otherwise disciplined you? * No Yes
3. Has any state or federal regulatory agency or self-regulatory authority ever filed a complaint against you? * No Yes
4. Has a bonding or security company denied, ever paid out or revoked a bond? * No Yes

ABORT CASE

CONTINUE

Onboarding Steps – License Info



License Information

We pulled a report of your license information with NIPR. Based on the states in which CSH is active, we have found these active state licenses, listed below. Please select the states you intend on selling CSH products in.

For recertifying agents: The disabled checkboxes are states that you are already considered "active" in.

CO - Colorado

GA - Georgia

IL - Illinois

NC - North Carolina

SC - South Carolina

VA - Virginia

ABORT CASE

CONTINUE

- The states populated are the states NIPR has identified. Select all the states you intend to sell or receive commissions.

- All states are Just-in-Time.
- Both individual Agents and Agencies are required to be licensed and/or appointed. CSH requires the Agent Principal to be licensed and appointed.

Onboarding Steps - Documents



- Upload requested documents.
- Please make sure the documents are current and not out of date, as this will delay the process.
- E & O coverage must carry minimum of \$1 million per occurrence/annual aggregate.
- Refer to next slide for what, if any, additional information is needed for each document.
- Successful uploads will change the blue box to green.

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

Required documents:

- Current E&O Certificate
- W-9
- AHIP Training Certificate

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)



ABORT CASE

CONTINUE

Onboarding Steps – Banking Info



Fields marked with an asterisk (*) are required.

Banking Information

Payment Method	ACH (Direct Deposit)
Account Type *	CC
[?] Account Number: *	
Verify Account Number *	
[?] Routing Number: *	
Financial Institution *	

ABORT CASE

CONTINUE

- Input applicable banking information.
- Please take a moment to verify the Account and Routing numbers entered are correct.
- **PLEASE NOTE to LOAs:** Any information uploaded does not change or alter the Banking Information already on file.

Onboarding Steps – Training



- Click TAKE TRAINING to Download the Training Guide.
- Complete CSH Certification Training and take exam. (User must pass at 85% within 3 attempts.) *Except for the AGENCY, all training needs to pertain to the Agent Principal and not the Agency.*

Training Information

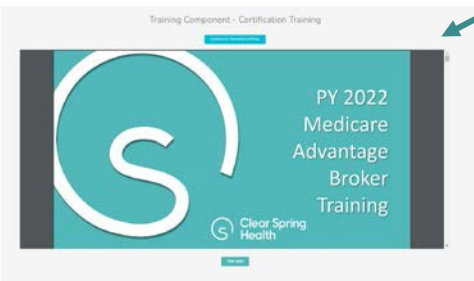
Available Trainings

Training Name	Training Type	Status
Certification Training	CSH Certification Training	Incomplete

Component Name	Started	Completed	Score	Pass / Fail
Certification Training				

TAKE TRAINING

ABORT CASE



Onboarding Steps – Training



Training Information

Available Trainings

Training Name	Training Type	Status
Certification Training	CSH Certification Training	Passed

Component Name	Started	Completed	Score	Pass / Fail
RESULTS Certification Training	07/21/2021 02:33 PM	07/21/2021 02:36 PM	100.00	Passed

- Confirm completion, score and pass/fail have been recorded prior to continuing to the next step.

ABORT CASE

CONTINUE

Onboarding Steps – Submit



- Input applicable information and sign.
- To complete the onboarding process: Both boxes must be checked, the Agreement must be signed(digitally) and click SUBMIT.



Onboarding Steps – Submit *(cont.)*

Submission Successful!

Thank you for submitting your application.

Your application has been sent to CSH for approval. You will be notified via email once action is taken regarding your application. If approved, you will receive an email regarding your login details and portal access.

Application Name	Rocks
Email	Johnny.Rocks@noemail.com
NPN	8675309



Approval Process



Onboarding Steps – Approval Process

- Clear Spring Health will:
 - Review responses to the background questions
 - Confirm uploaded documents match requested information
- Cases will be designated as one of the following and an email will be sent to the email address on file for that case.
 - Approved
 - Incomplete
 - Denied
- AGENCIES:
 - Once your Agency has been approved, Broker Support or Your Agency(not your immediate upline) will be able to send the onboarding case for the Agent Principal.