



Agent Transfer Process

If an agent is wishing to transfer their contract, they will need to complete the following steps:

1. Email Broker Support at brokers@fridayhealthplans.com and state that you request to transfer your contract to Agent Pipeline. Please make sure you include your NPN. Please Cc apcontracting@agentpipeline.com on the email request.
2. If you are under another upline (not direct), you will need to attach a release letter from your current upline to the transfer request email.



Completing the Application of Appointment

Once a Friday Health Plans Admin or an Agency has entered an applicant into the Friday Health Plans Broker Appointment platform, an email notification will be sent to the applicant's email. The email will come from noreplyjob@evolvenxt.com. Depending on your organization's email security, this email may end up in a junk or spam email box- be sure to check these locations if you have trouble finding it.

NOTE: EvolveNXT is the platform Friday is using to help simplify the appointment process.

You will also receive a separate email from Friday Health Plans with your state-specific Producer Agreements. These will need to be uploaded during the application process.

1. Open the Friday Health Plans Contracts and Application for Appointment- Action Required email.
2. Click on the URL located in the middle of the message.
3. Using the **login email address** and **Password**, login to the portal.
4. You will be taken to Onboarding Cases where you will begin your application.
5. Before beginning the application, verify the information under Onboarding Name, Year, NPN, States and Upline Level has been entered correctly.
 - a. The year should be the year that the application is being submitted in. For example, if an application is being sent on 8/27/2020 the year should be 2020.
 - b. If you notice that any of the information is entered incorrectly, contact brokers@fridayhealthplans.com or 844-270-7075 to correct this information.

Onboarding Name	Year	Type	NPN	States	Upline Level	Affiliated Agency/Team	Submitted By	Creation Date	Status
Chimney Rock General Agency	2020	Initial	1231231234	CO,NM,NV,TX	GA		Wagar, Samantha	08/27/2020	Created - New

6. Click Start.
7. Contact Info
 - a. Verify any pre-filled personal information.
 - b. Enter all information required in the blank boxes.
 - c. Click on the blue "Check NPN" button. This will validate the NPN that was entered.
 - d. Complete the Primary Address Information.
 - e. Click Continue.
8. Additional Info
 - a. Complete the Background Questions by answering "Yes" or "No".
 - b. For any questions answered "Yes", please enter a detailed explanation of the circumstances.
9. License Info



- a. Review the NIPR response; no action is needed by the applicant at this point.
- b. Click Continue.

10. Documents

- a. Upload documents for Friday Health Plans review.
- b. E&O
 - i. Enter the Carrier Name.
 - ii. Enter the Start Date of your policy.
 - iii. Enter the End date of your policy.
 - iv. Enter the policy coverage amount (limits).
 - v. Click Browse.
 - vi. Select the file that you wish to upload.
 - vii. Click Upload.
- c. W-9
 - i. Click Browse.
 - ii. Select the completed W-9 file that you wish to upload.
 - iii. Click Upload.
- d. Contract (state-specific Producer Agreements)
 - i. Click Browse.
 - ii. Select the file(s) that you wish to upload.
 - iii. Click Upload.
- e. Click Continue.

11. Submit

- a. Review the Attestation.
- b. Check the two boxes below the attestation.
- c. Sign your name in the signature capture box.
- d. Click Submit.

12. Once submitted, you will have the option to download and save / print a copy of your signed attestation.

Submission Successful!

Thank you for submitting your application.

Your application has been sent to FHP 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.

Below is a copy of your signed contract. Please download and/or print a copy for your records. If approved, you will be able to view your contract in your portal.



Application Name	Chimney Rock General Agency
Email	vehos91250@qqmimpi.com
NPN	1231231234



Once your application is submitted, the Friday Health Plans Broker Sales Support team will review your application. You will be notified of the outcome of your application review via email from noreplyob@evolvenxt.com.

Uploading your Agency's Broker Agents

Once your application has been approved, you may begin loading your agents into your Agency's portal. Access the Friday Health Plans Broker Appointment portal via the acceptance email to get started. If you experience any difficulties with this process, please contact us at brokers@fridayhealthplans.com or 844-270-7075.

1. Login to the Broker Portal.
2. Locate Onboarding on the Dashboard.

PORTAL: ONBOARDING

CHIMNEY ROCK GENERAL AGENCY RETURN TO EVOLVE

Dashboard

- Birthdays: 0
- Del: 0
- Training: 0
- License: 0
- Mbrs Missing Premiums: 0
- My Brokers: 1
- App Status: 1
- My Brokers: 1

3. Click on the "Create Case" body button to begin entering in your Agents.

Onboarding Cases

CREATE CASE INSERT FILE FOR AGENTS SEE SAMPLE AGENT FILE

Show 10 entries

Onboarding Name	Year	Type	NPN	States	Upline Level	Affiliated Agency/Team	Submitted By	Creation Date	Status
Chimney Rock General Agency	2020	Initial	1231231234	CO,NM,NV,TX	GA		Wagar, Samantha	08/27/2020	Approved

Showing 1 to 1 of 1 entries

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4. Enter the required information for the agent you wish to onboard.
 - a. The year should be the year that the application is being submitted in. For example, if an application is being sent on 8/27/2020 the year should be 2020.
 - b. Email addresses must be unique.

IMPORTANT: If your agency shares a single email account across several agents, a new agent specific email address **must be created** to apply.

- c. Be sure to select all States that your agent sells in.

Create New Onboarding Case

Onboarding Type *	EXTERNAL AGENT
Agent First Name *	Linda
Agent Last Name *	Perkins
Year *	2020
Email *	bepoli7693@qqmimpi.com
NPN *	456456285
State(s) to Sell *	CO, NM, NV, TX
Agent Paid Direct? *	<input checked="" type="radio"/> LOA <input type="radio"/> Direct
Completed By? *	<input checked="" type="radio"/> Agent <input type="radio"/> Agency - Agent's Behalf

INSERT

5. Click Insert.
6. Click Close.
7. Continue entering your agent team by repeating the above steps.
8. Once an agent is entered into the portal, they will receive a welcome email to complete their appointment application.

Once the application is submitted, the Friday Health Plans Broker Sales Support team will review the application for approval. Agents will be notified of the outcome via an email from noreply@evolvenxt.com.