

# Clover Health

## Your Step-by-Step Guide to Annual Certification on EvolveNXT

Welcome, valued agent partner!

This guide is designed to walk you through Clover Health's annual certification process on our new, user-friendly platform, EvolveNXT. Please follow these steps carefully to complete your training and get certified to sell for the upcoming plan year.

### Before You Begin

You will need two things to get started:

- 1 Your National Producer Number (NPN)
- 2 Access to the email account associated with your EvolveNXT agent profile

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### Step 1: Invitation Email & Initial Login

You will receive a welcome email from the following email: [donotreply@evolgenxt.com](mailto:donotreply@evolgenxt.com)

- **Subject Line:** Look for the following subject – Action Required: Clover Health Agent Contracting
- **Action:** Click the Evolve link provided in the email to go to the EvolveNXT portal
- **Username:** Your username is your email address
- **Password:** On your first visit, you will be prompted to create a new, secure password (if you haven't accessed your profile yet)
- **EvolveNXT URL:** <https://account.evolgenxt.com/>

*Tip: Bookmark this page for easy access later.*

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### Step 2: Verify Your Profile Information

Accuracy is crucial. The first thing you will do upon logging in is verify your agent profile before you can continue with your training.

Carefully review all the information on the screen. To revisit a previous step, select the section title at the top instead of clicking "Abort".

#### **Contact Info**

- Your full name
- Your NPN and SSN
- Your contact information (address, phone number, email)
- Your upline and broker subtype
- If any information is incorrect, please follow the on-screen prompts to update it.

## Payment

- Fill out your W9 and banking information (if applicable)
  - You will only complete payment information if you are a Downline Only agent. Otherwise, you will be paid by your upline.

## License Info

- EvolveNXT will check your licenses in all Clover states.
- All states will be utilizing Just-In-Time appointments except for Pennsylvania.
- If you would like to become RTS in PA, you must check the box next to Pennsylvania. All other states will be auto-checked for you.

### Pre Appointment Declared States

These states need an appointment to sell in this state. Please select the states you would like to sell in.

PA - Pennsylvania

☒ MA

Your License Status: **Active**

## Documents

- Upload your E&O (if applicable)

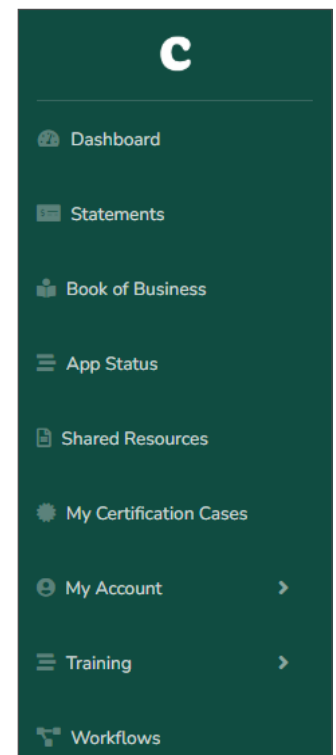
## Submit

- Review Clover's Agent Contract and your W9 (if applicable) and electronically sign

## Step 3: Navigating Your EvolveNXT Dashboard

Your dashboard is your home base for certification. Take a moment to familiarize yourself with the layout. You will see sections such as:

- **Dashboard:** Status, Quick Links, Credentials, Enrollments, and Statements
- **Statements:** Check commissions statements
- **Book of Business:** Keep an eye on your book of business
- **App Status:** Stay up to date on your applications throughout the year
- **Shared Resources:** Access important documents, forms, and agent guides
- **My Certification Cases:** Verify your contact, payment, license information, and upload your errors & omissions coverage.
- **My Account** (Account Info, Payee Info, My Hierarchy Info): View and manage your personal and license information
- **Training** (Medicare Certifications, Required Training): This is where you will find and launch your required courses



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## Step 4: My Certifications

- 1 Verify your contact information
- 2 Verify your payment information (if applicable)
- 3 Verify that your license information is showing
- 4 Upload a copy of your current Errors and Omissions coverage
- 5 Submit your signature on your Clover Health agent agreement.

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## Step 5: Medicare Certificate

To comply with Clover Health's certification requirements necessary for Ready-to-Sell (RTS) status, you are required to complete Medicare Certification + Fraud, Waste, and Abuse Training annually.

- If you have already completed AHIP certification for the plan year, please select the "Go to AHIP" button to add Clover as an affiliate corporation in your AHIP profile. Certification completion will update within 24 hours of your affiliation update.
- If you have already completed NABIP certification for the plan year, please select the "Go to NABIP" button to add Clover as an affiliate corporation in your NABIP profile. Certification completion will update within 24 hours of your affiliation update.

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## Step 6: Launching Your Clover Health Training

- 1 From the dashboard, click on the "Training" > "Required Training" section
- 2 You will see the Clover Health certification path listed. It is titled "2026 – Clover Health Training"
- 3 Click the "Start" button to begin the training modules

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## Step 7: Completing the Training Modules

The certification curriculum is broken down into several self-paced modules.

- You must complete each module in the order it is presented.
- Modules will cover essential topics like plan benefits, service area updates, compliance rules, and our model of care.
- Ensure you complete every section of a module. A "Completed" status will appear next to the module name when it's done.

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## Step 8: Passing the Final Exam

After you have completed all training modules, the final exam will become available.

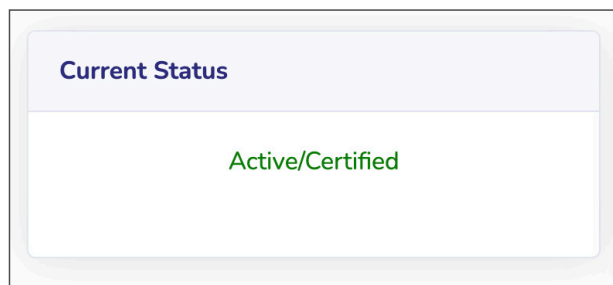
- **Launch the Exam:** Click the "Start" button.
- **Passing Score:** You must achieve a passing score of 85% or higher to successfully complete this training course.
- **Attempts:** You will have 3 attempts to pass the exam. If you do not pass on your first attempt, you may be required to wait a short period before trying again.

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## Step 9: Confirm Your RTS Status

Congratulations – Your certification is complete!

- Navigate to your “Dashboard” button and your certification current status should update to “Active/Certified.”



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## Need Help?

We are here to support you throughout this process should you encounter any challenges.

### Clover Health Broker Support:

- **Phone:** 1-855-979-2236  
**Hours of Operation:** 9 am–7 pm EST, Monday–Friday
- **Email:** [brokers@cloverhealth.com](mailto:brokers@cloverhealth.com)

### Clover Health Contracting:

- **Email:** [contracting@cloverhealth.com](mailto:contracting@cloverhealth.com)

Find resources, guides, and your local sales manager on Clover Health’s website:

[cloverhealth.com/brokers/helpful-resources](https://cloverhealth.com/brokers/helpful-resources)