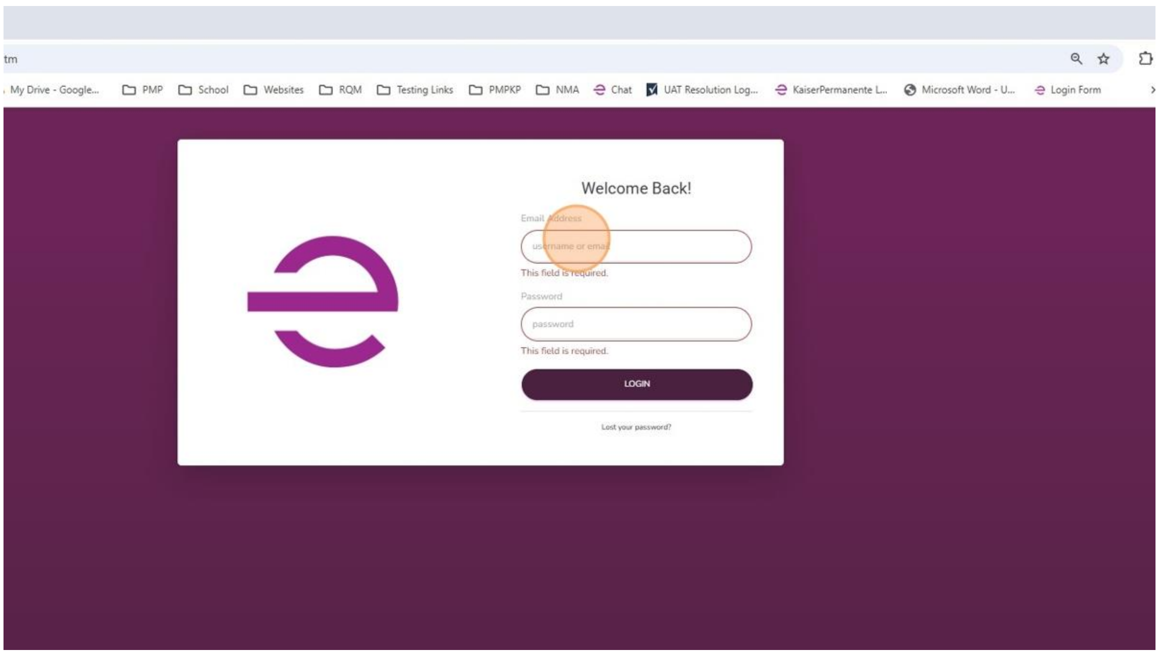
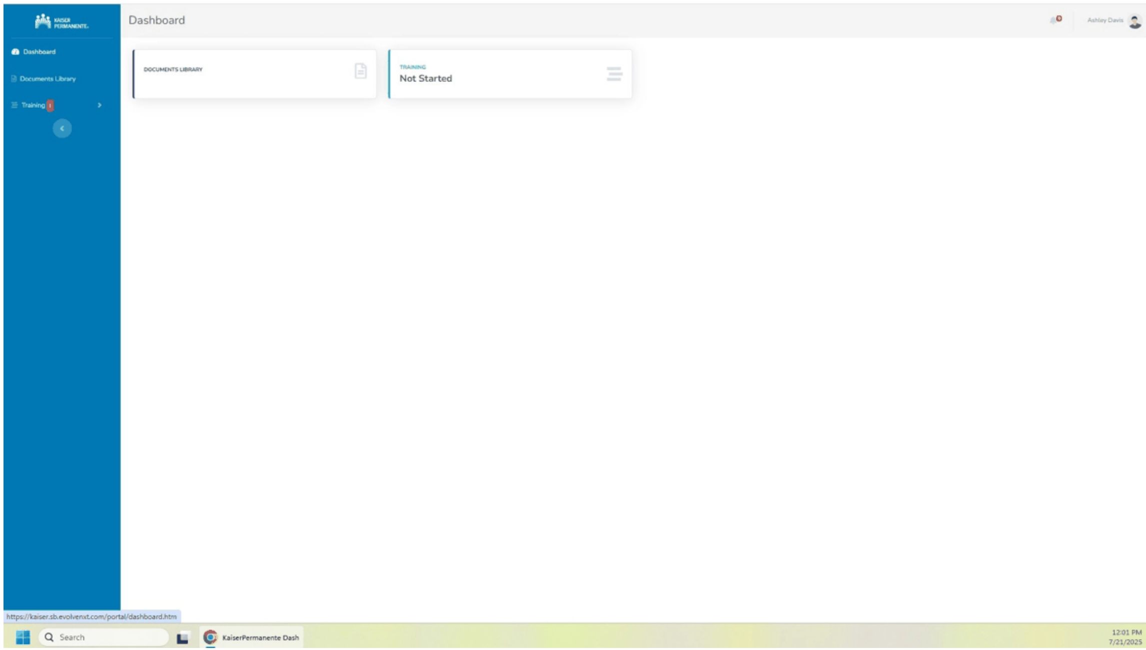
2026 Kaiser Permanente Annual Compliance Training Broker - Walk through

EvolveNXT Training Platform- External Brokers

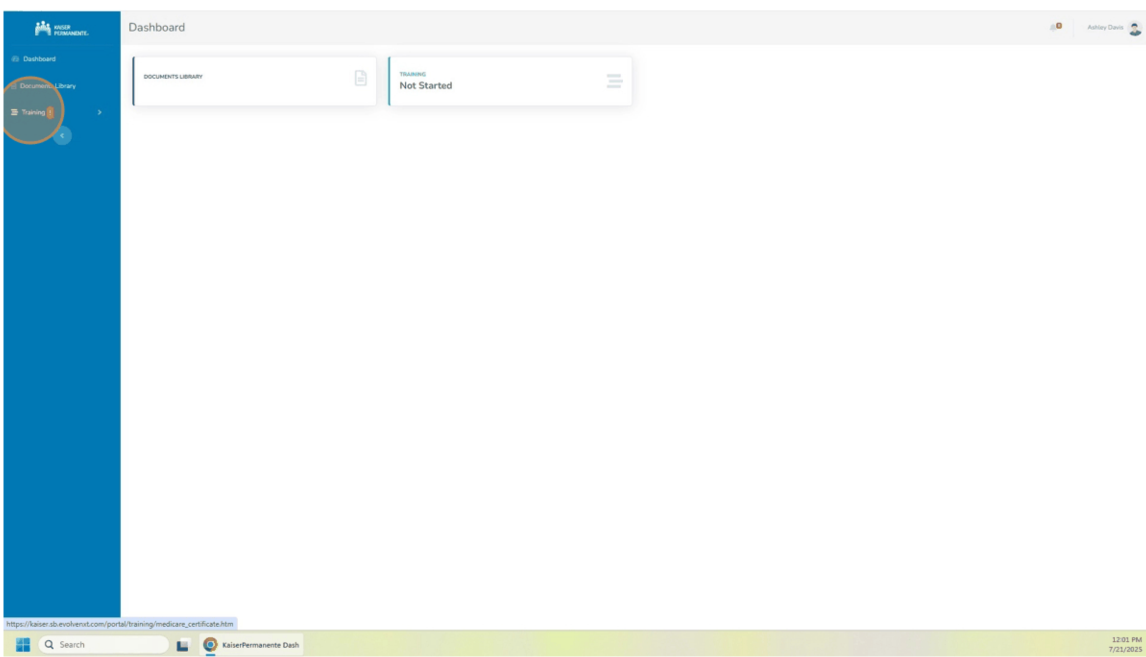
1. New agents without an existing EvolveNXT profile will use the link and temporary password in the Welcome email to complete their profile and create a personal password. Then, users will log in with email address and personal password.



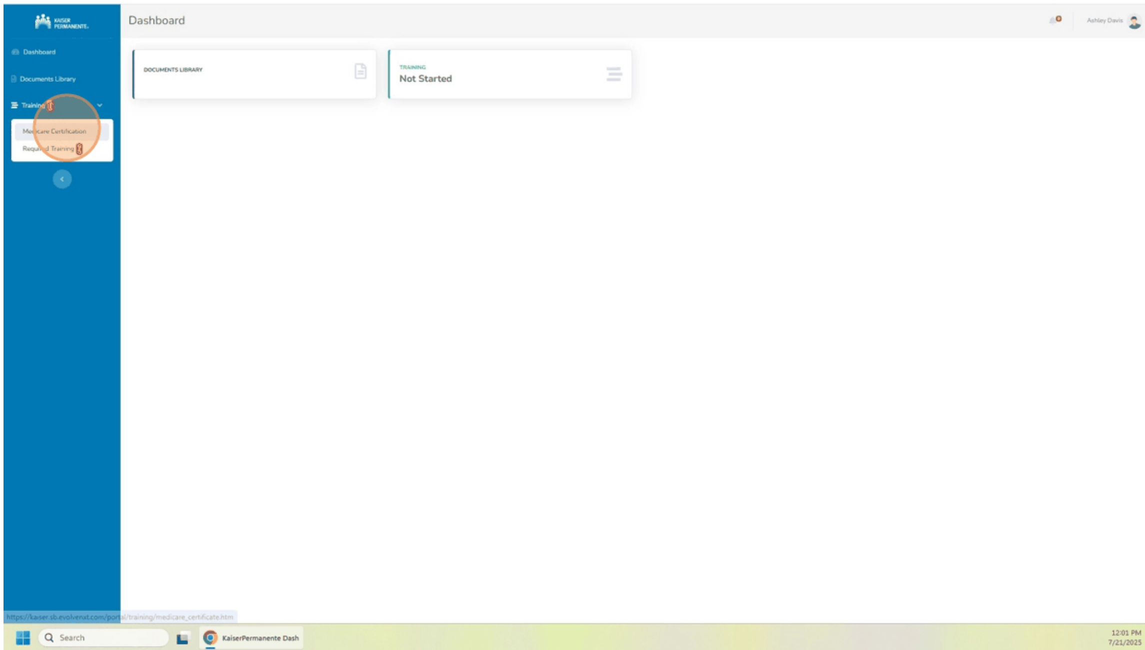
2. Broker Dashboard- Includes left side Navigation Panel and widgets linking to Documents Library and Training. The user can click on the Documents Library in the Navigation Panel or use the widget in the center of the screen. These go to the same location. The user can see the Training widget indicates progress- Not Started, In Progress, or Complete.



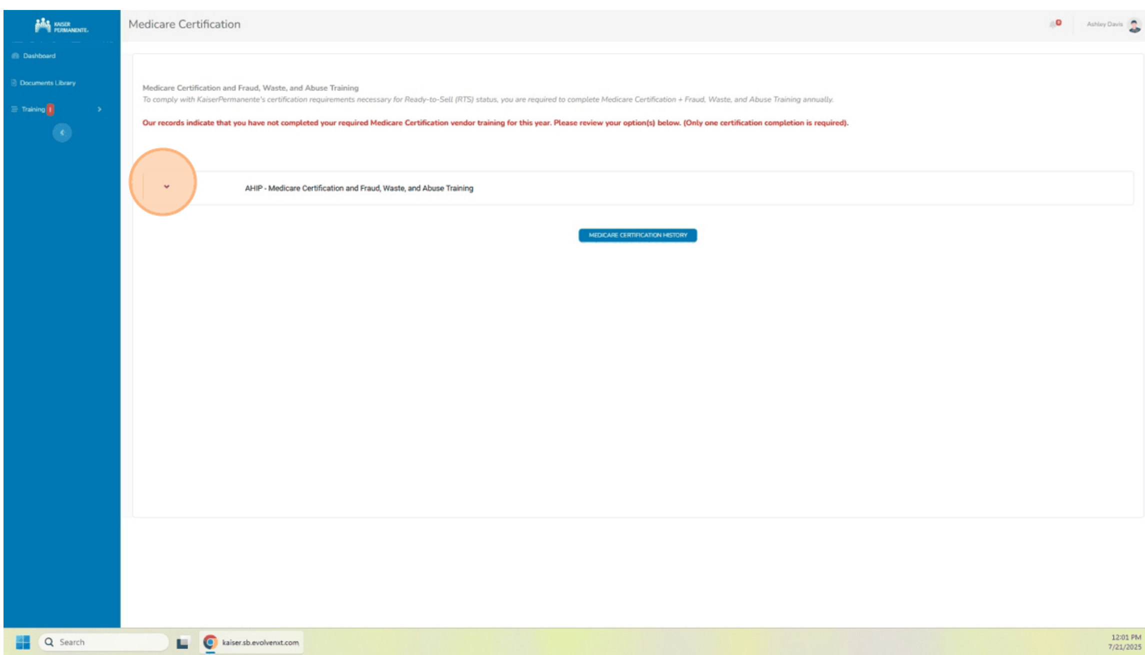
3. The Navigation Panel shows Training with a red '!' showing that there are incomplete items in the Training requirement.



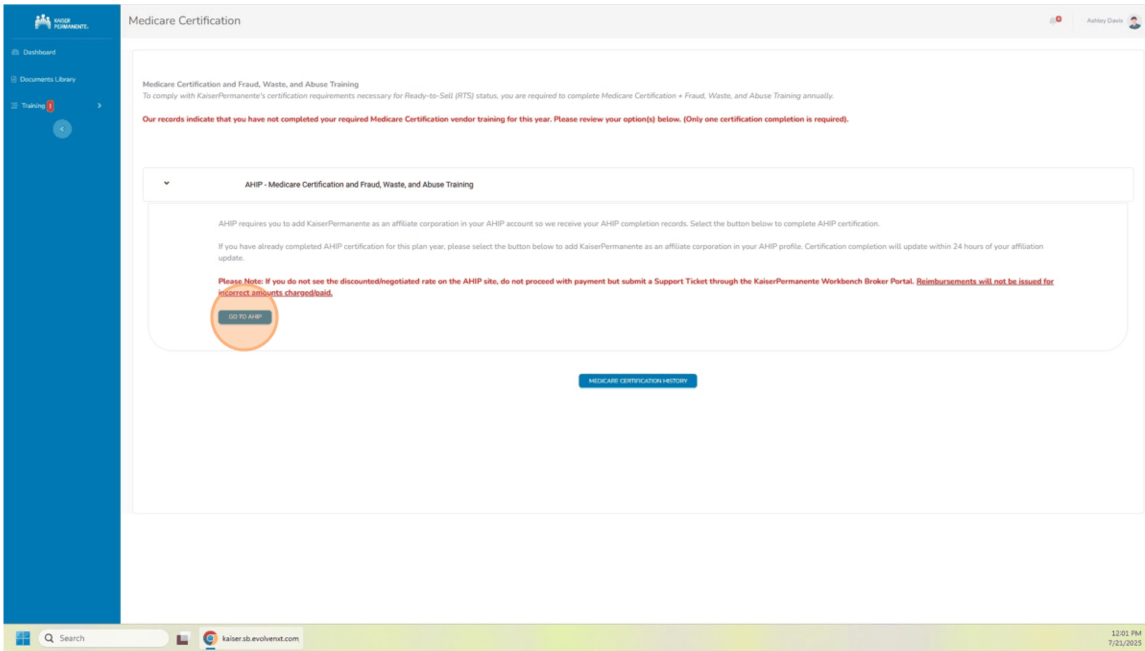
4. Click the drop-down arrow next to Training and the user will see there are two choices- Medicare Certification and Required Training. There will be a red '!' next to Required Training, if there are requirements to be completed.



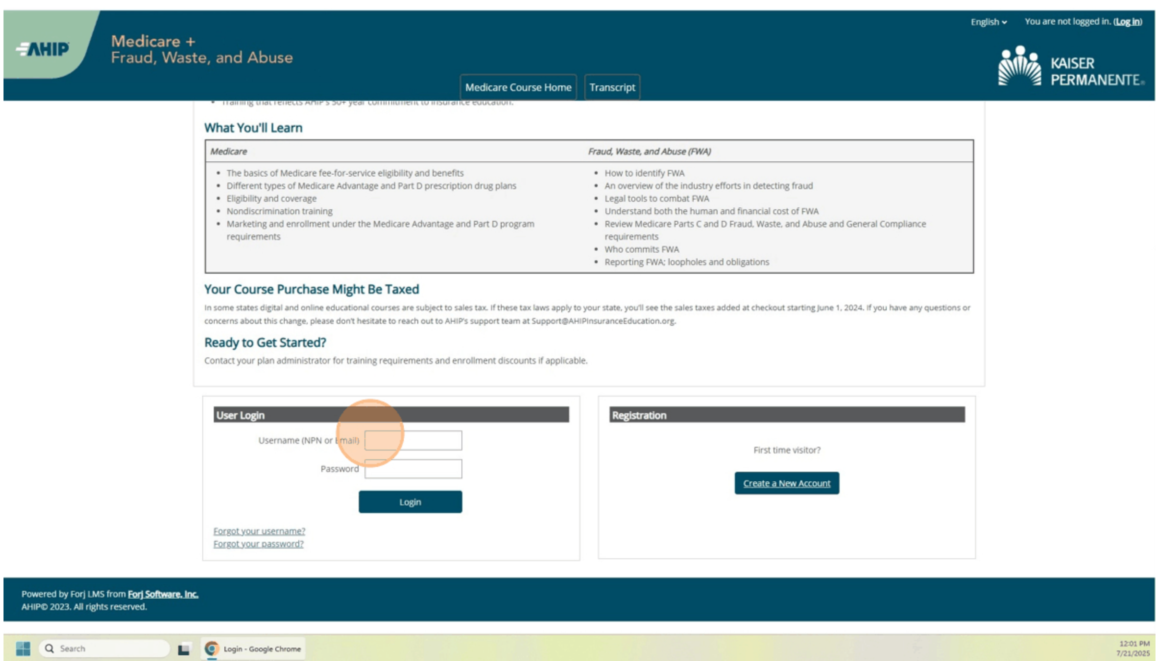
5. Click on the Medicare Certification and the user will navigate to the Medicare Certification Page. External Brokers will have instructions to open their AHIP profile and share Medicare +FWA with Kaiser Permanente.



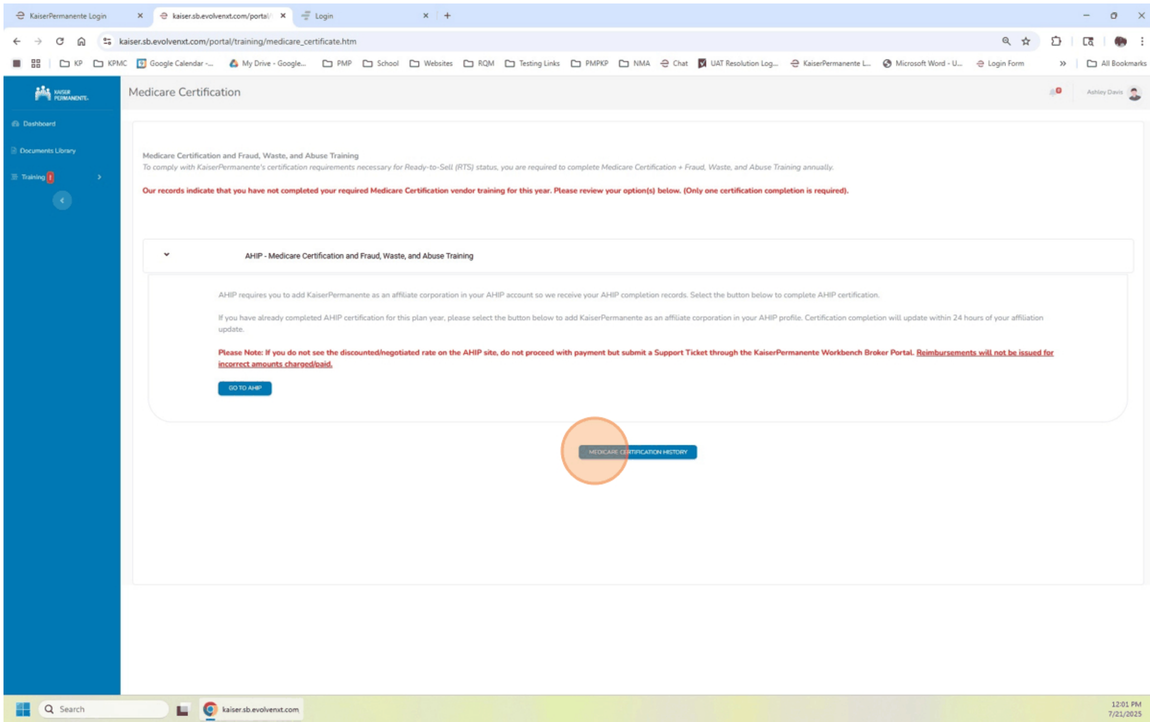
6. Click on GO TO AHIP link.



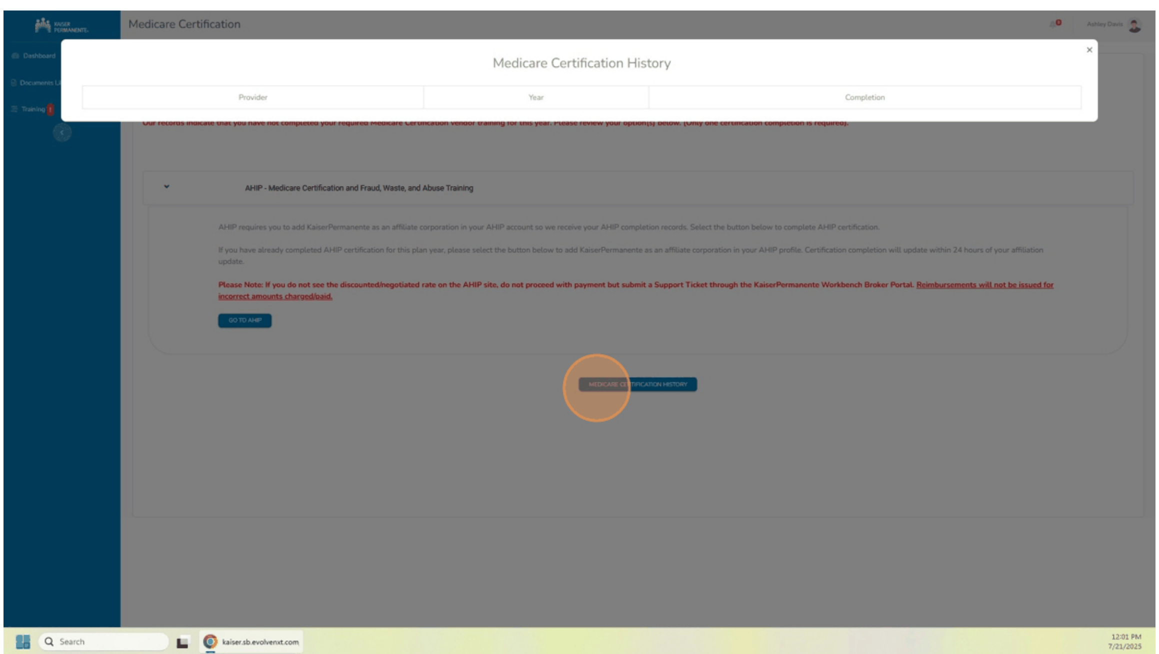
7. Click on User Login and enter AHIP credentials to select the option 1) purchase AHIP + FWA at a discount and complete certification or 2) share AHIP certification results with Kaiser Permanente.



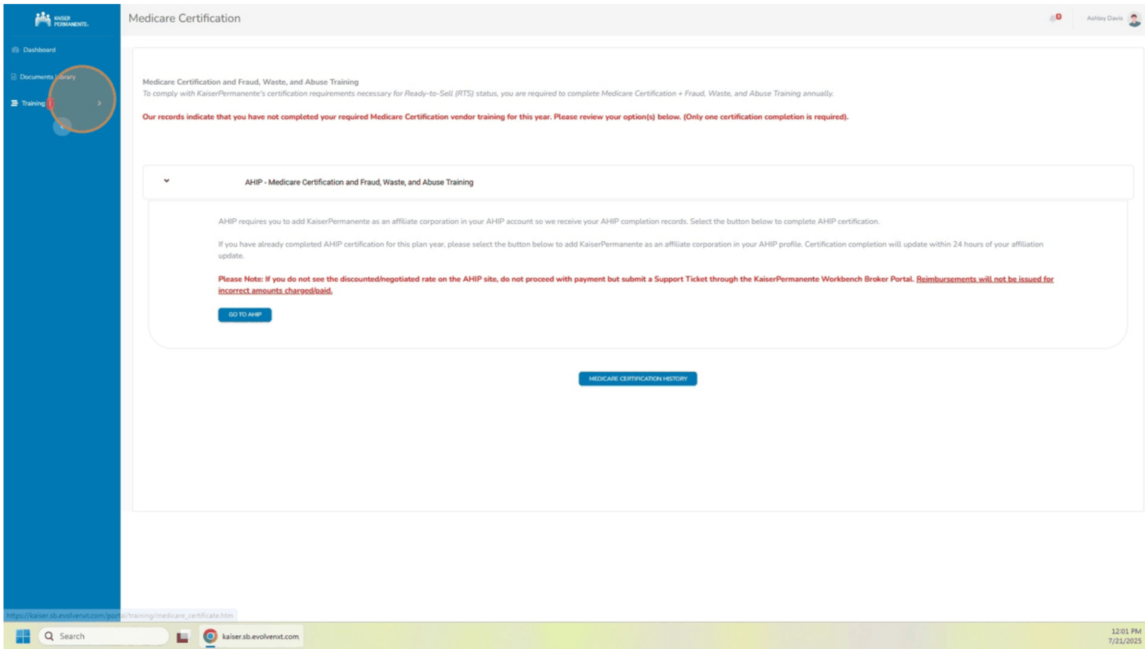
8. Navigate back to the EvolveNXT tab in the browser. It will take one day for the AHIP certification to be updated on this page.



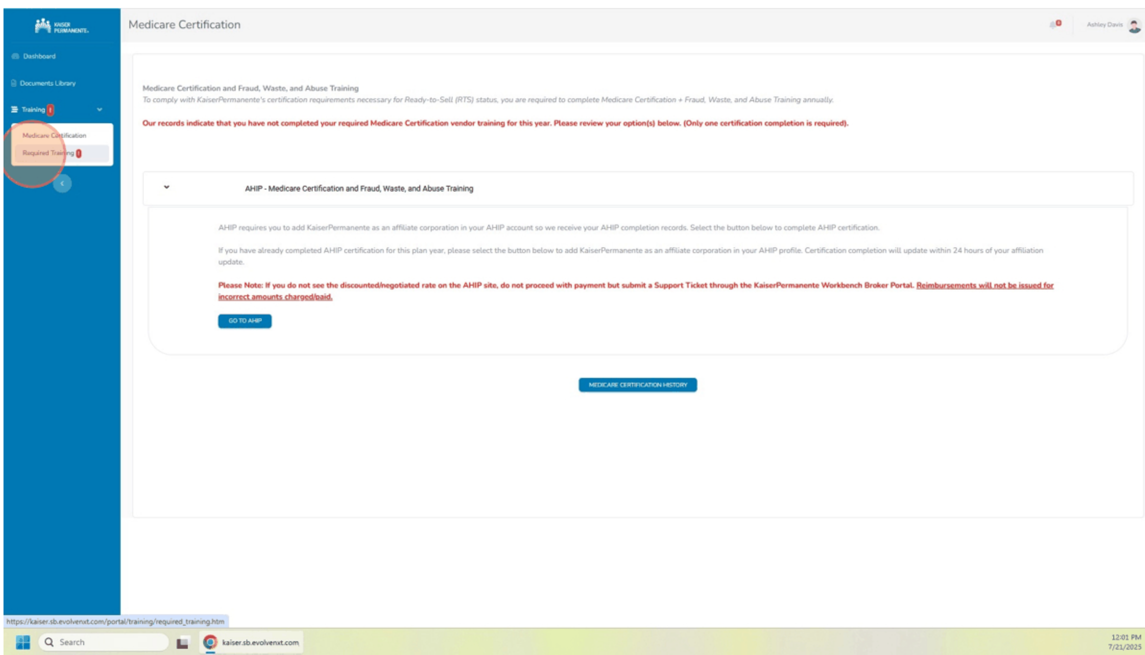
9. Results will be recorded in Medicare Certification History when they are received electronically.



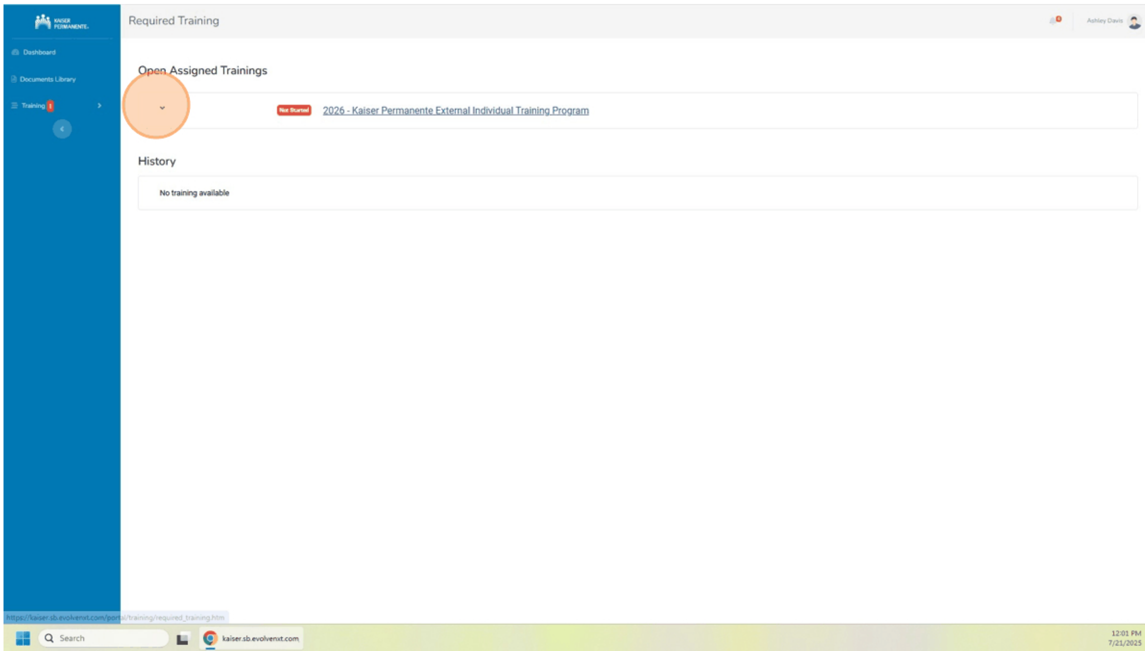
10. Click on Training to open drop-down in the Navigation Panel.



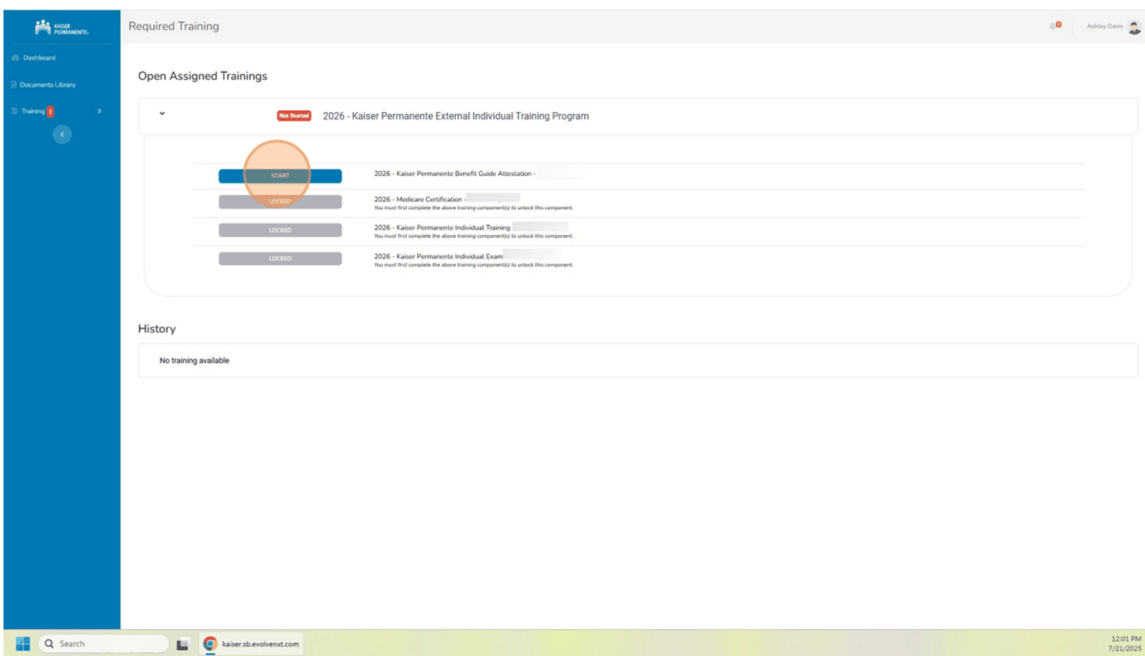
11. Click on Required Trainings to open Required Training page.



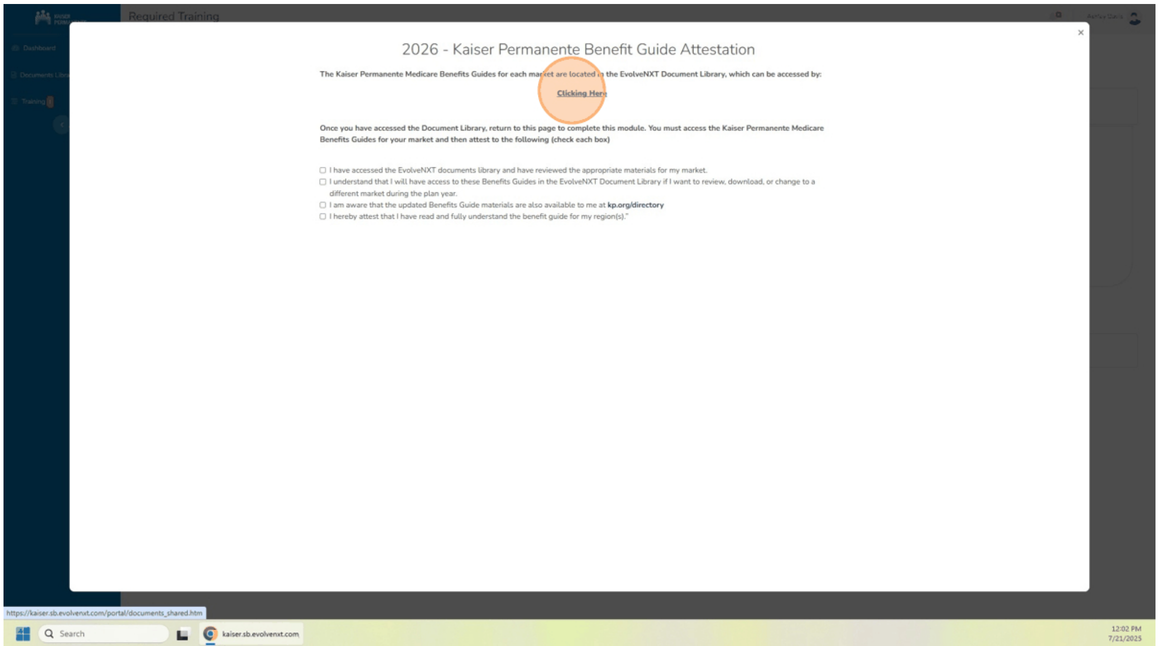
12. In Required Training page, the assigned training program will show the status of the training- Not Started, In Progress, and Complete. Click the arrow to open the training modules.



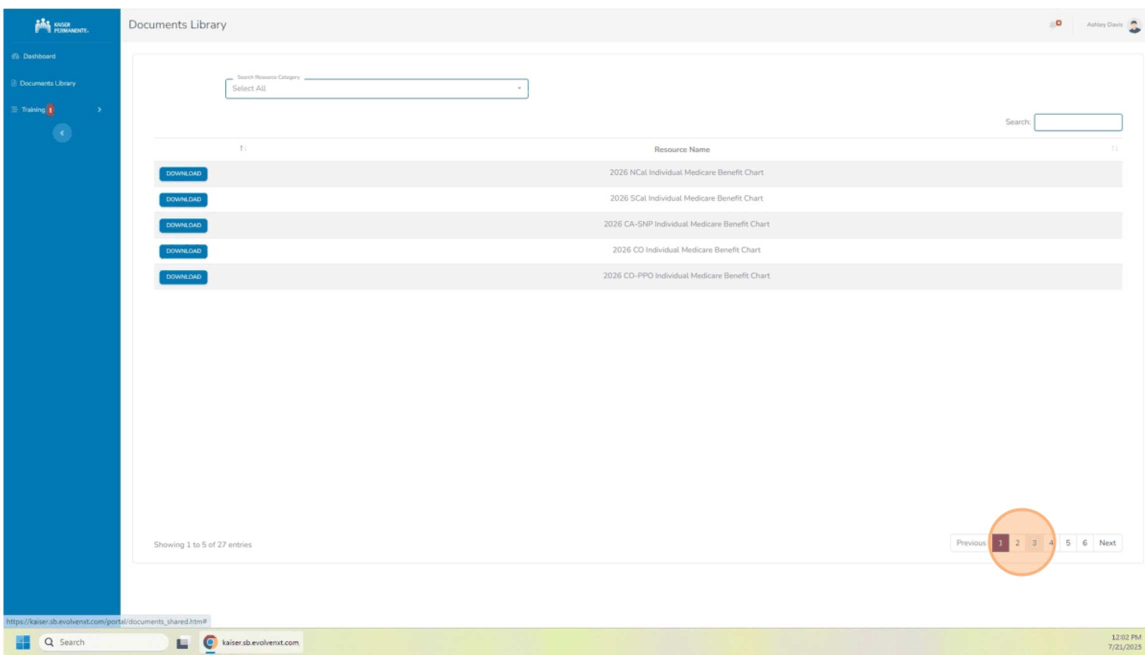
13. Click Start to begin the first module- Benefit Guide Attestation.



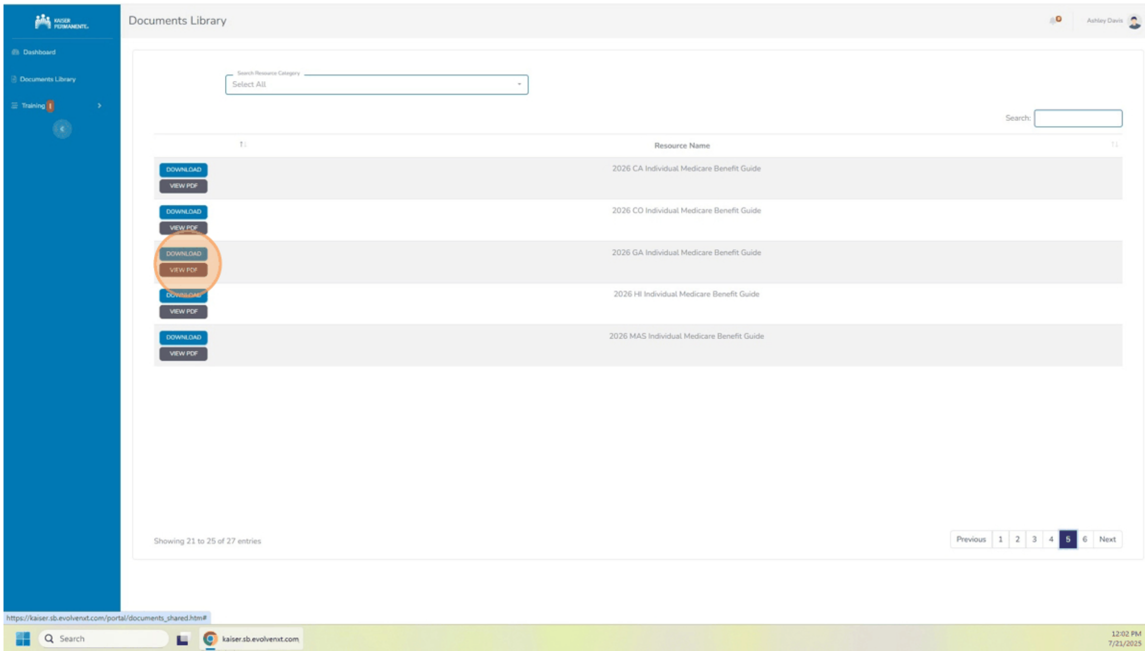
14. Benefit Guide Attestation will provide a link to the Document Library- Clicking Here.



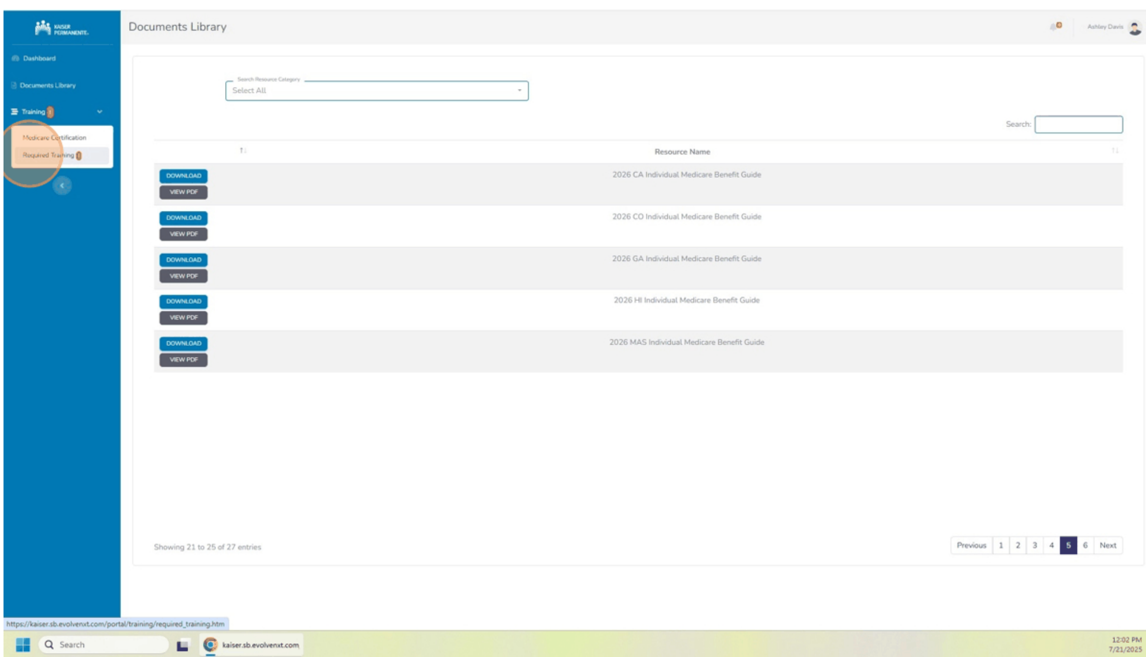
15. Document Library - navigate through the pages on the bottom to find the one(s) that apply to your sales activities.



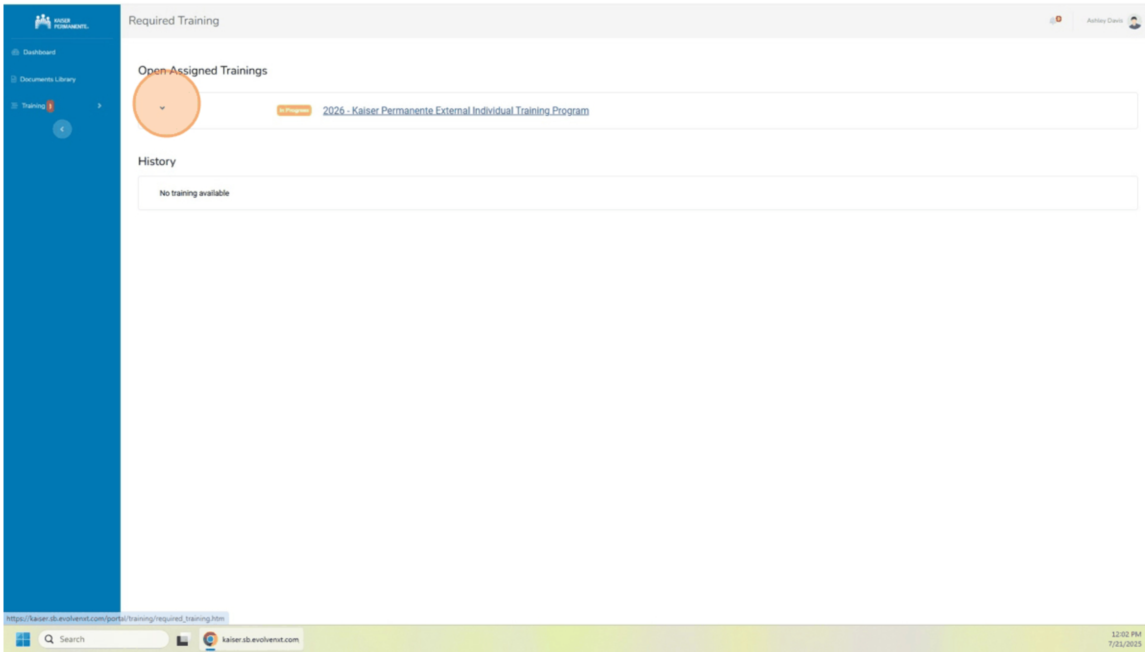
16. Some documents can be downloaded or viewed as a .pdf, some can only be downloaded.



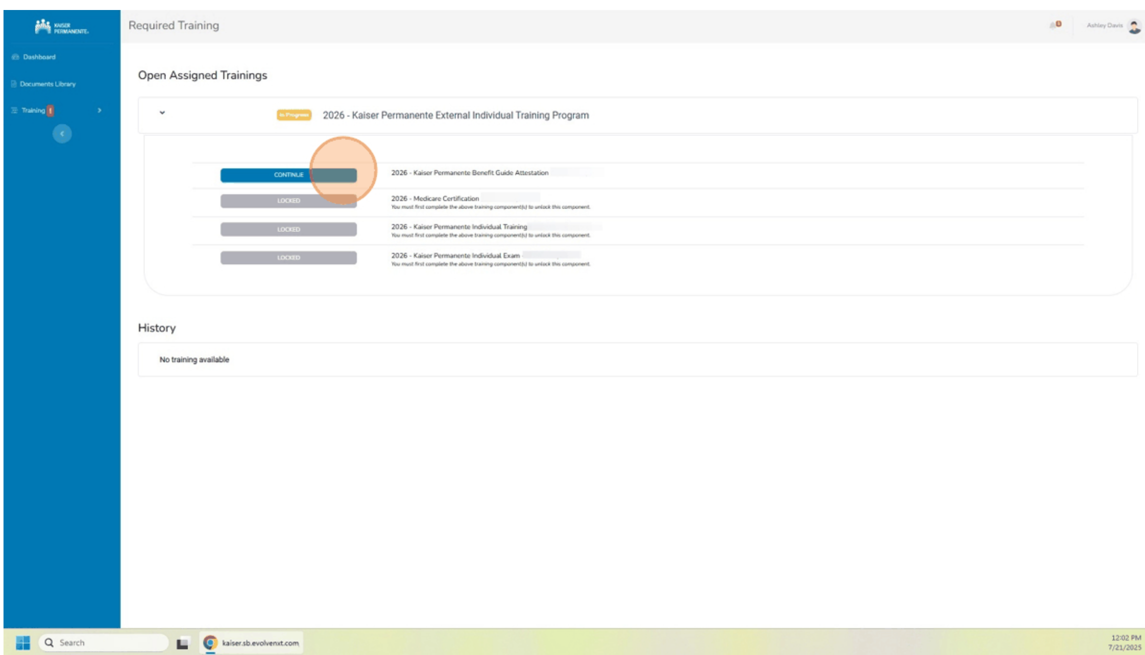
17. When you have reviewed the appropriate Benefits Guide, use the navigation bar to return to Training>Required Training>Required Training page.



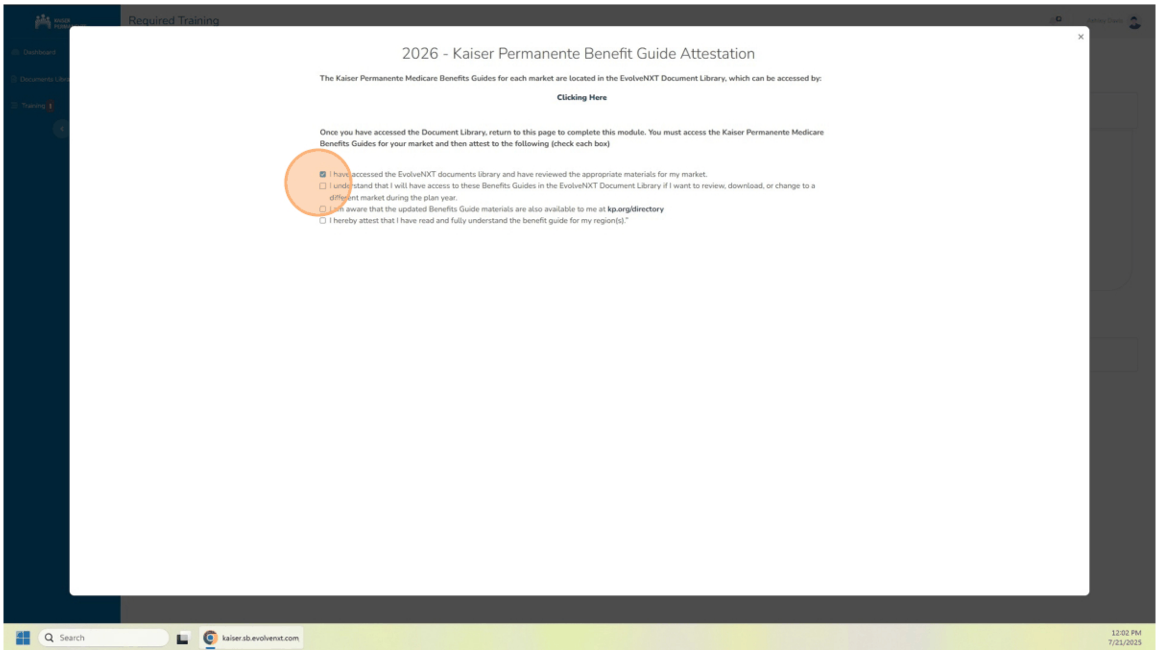
18. Your training status is now In Progress.



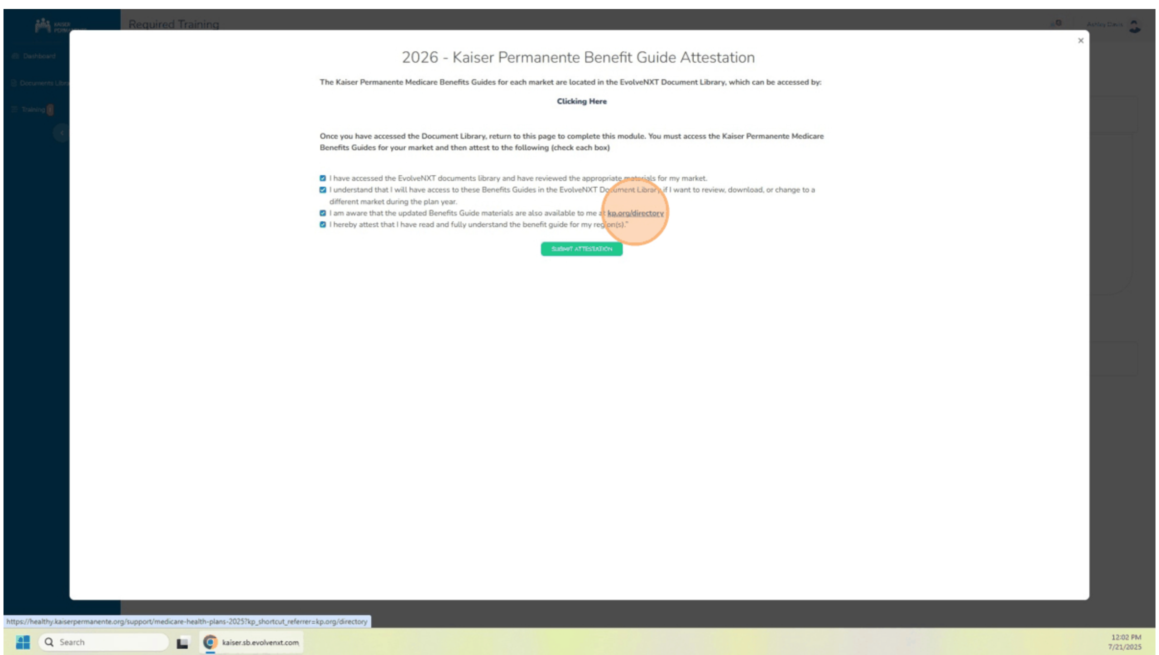
19. Click Continue on the Benefits Guide Attestation module.



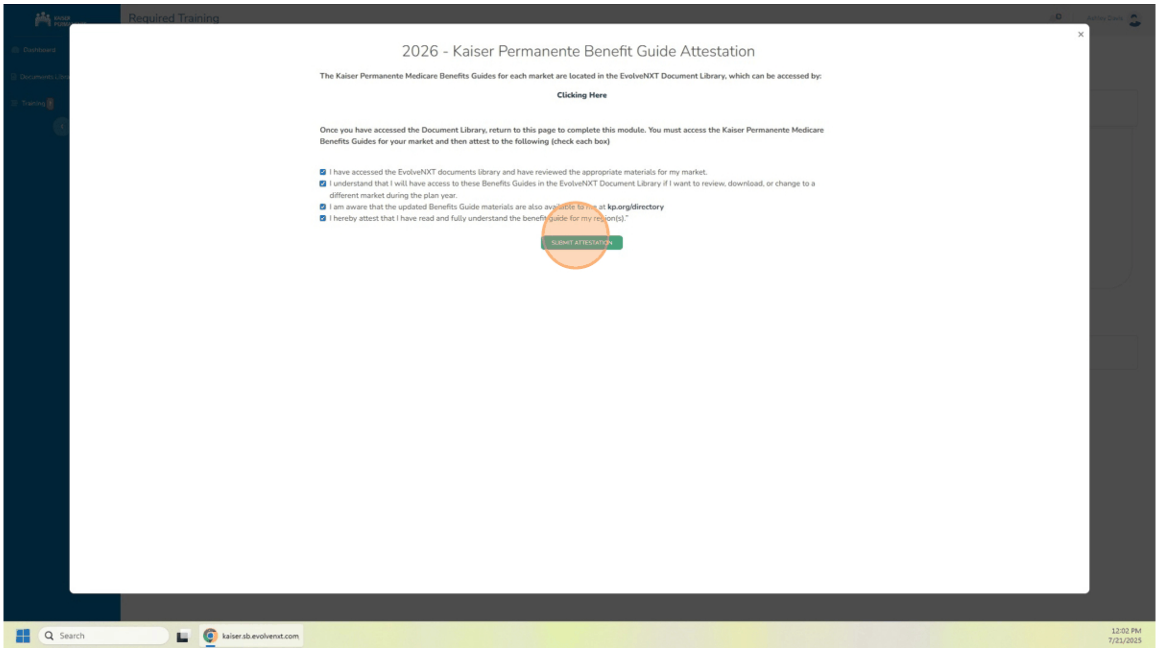
20. Click the Attestation checkboxes to make the Attestation.



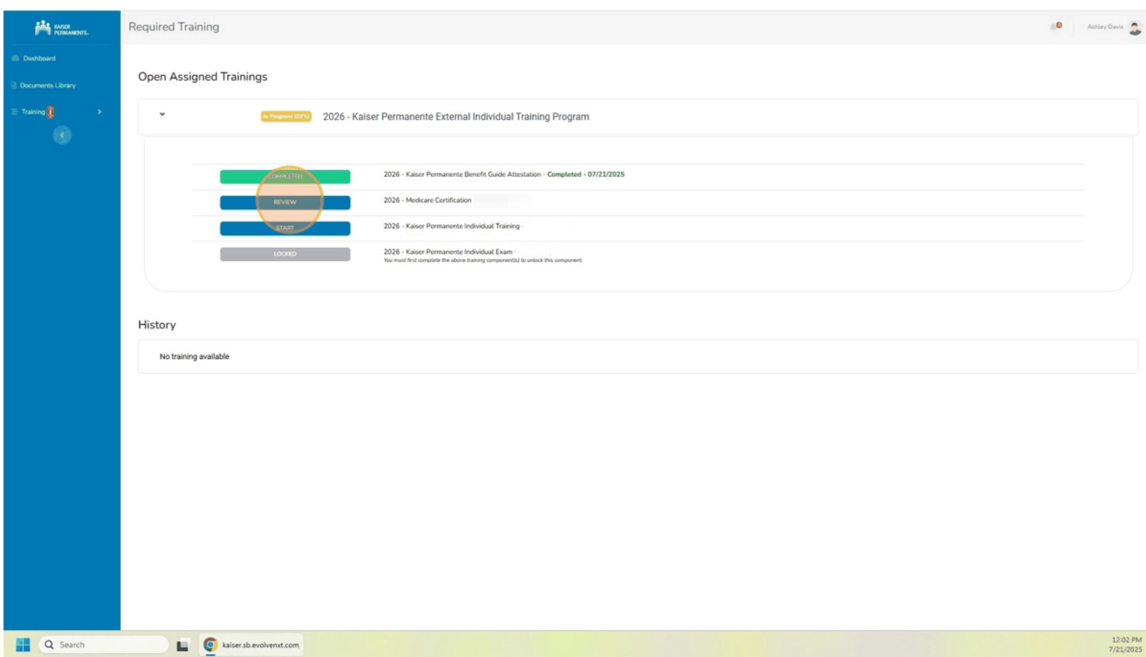
21. The link to the up-to-date Benefits Guides is available in this page.



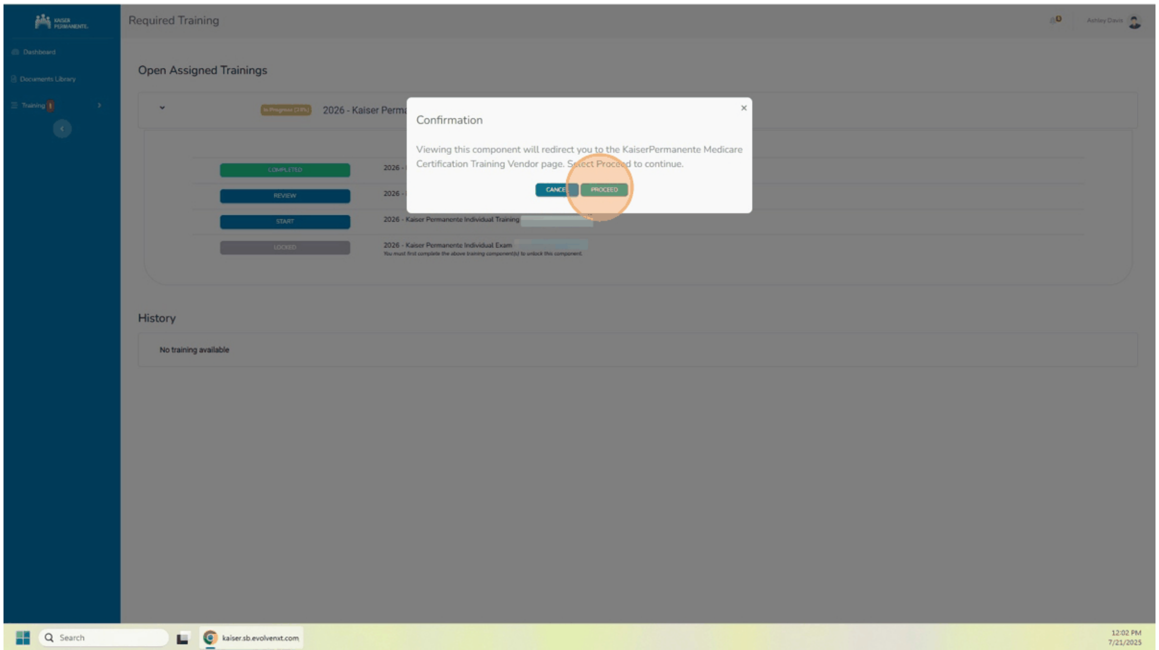
22. When the boxes are all checked, SUBMIT ATTESTATION appears. Click on the button to submit. The window will close, and you will be on the Required Training page.



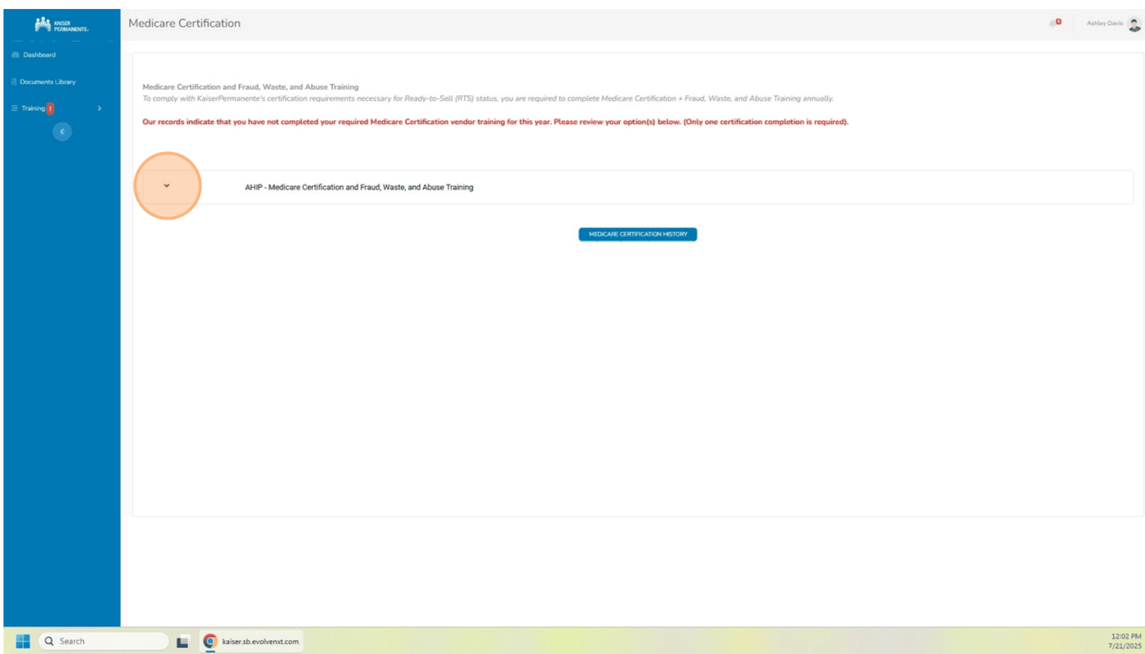
23. The Benefits Guide Module is now COMPLETE and there is a Completed date next to it. Medicare Certification is the next module. You can click REVIEW to go back to that page.



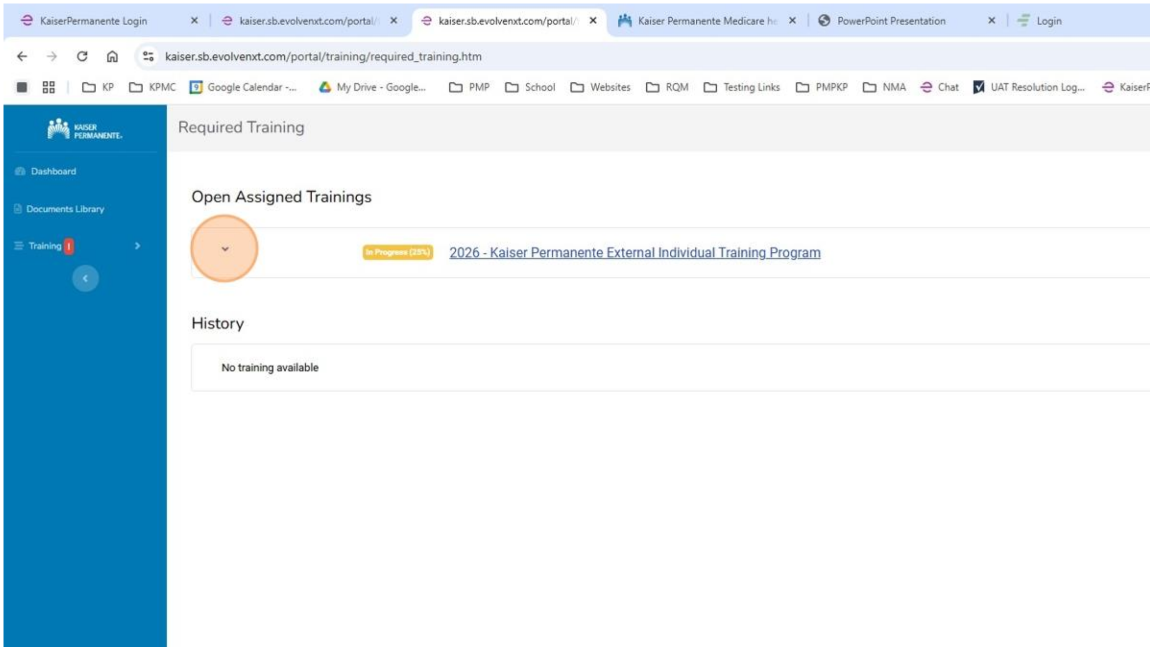
24. You will click PROCEED on the pop-up confirmation to go to the Medicare Certification page.



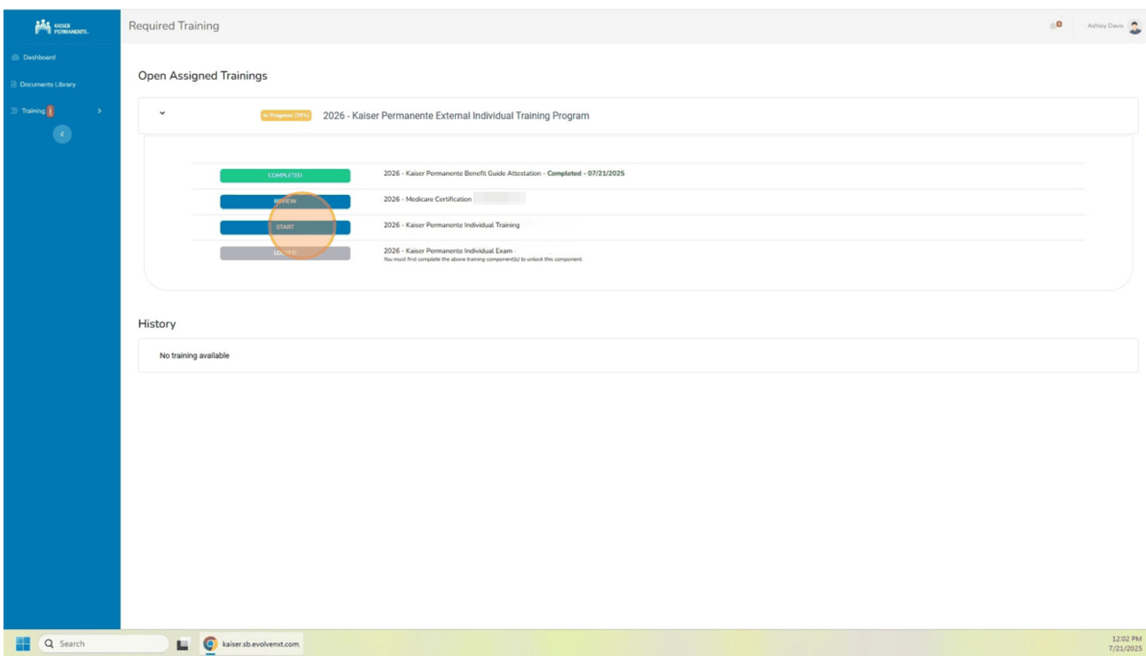
25. This is the same Medicare Certification page that provides the ability to link AHIP certification. You can complete this step if you haven't yet. Or you can go back and complete the rest of the training. The full program will not be complete until all the modules are complete.



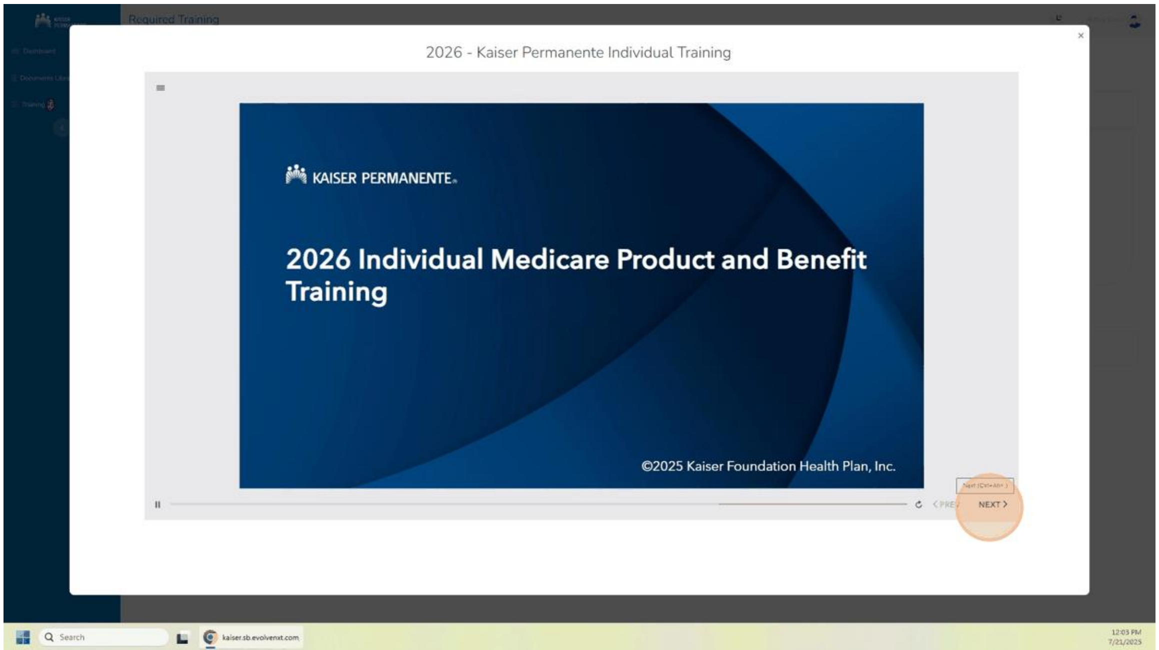
26. Use the Navigation Panel to click Training>Required Training> and Required Training page and click the arrow.



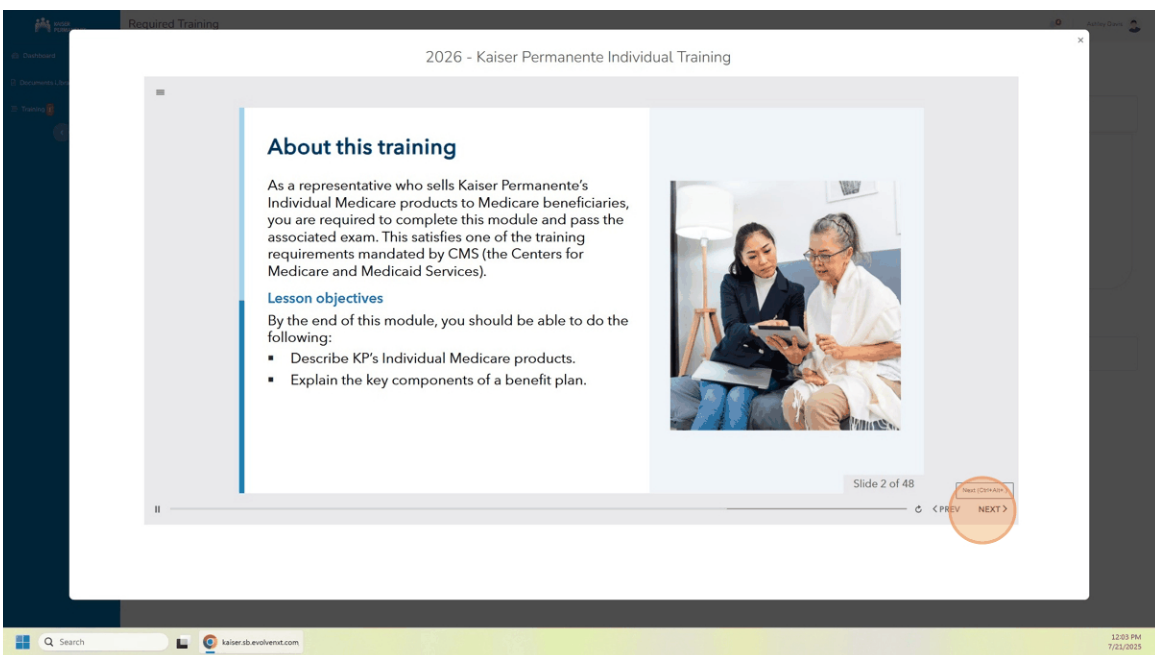
27. You can click START next to the 2026 Kaiser Permanente Individual Training module.



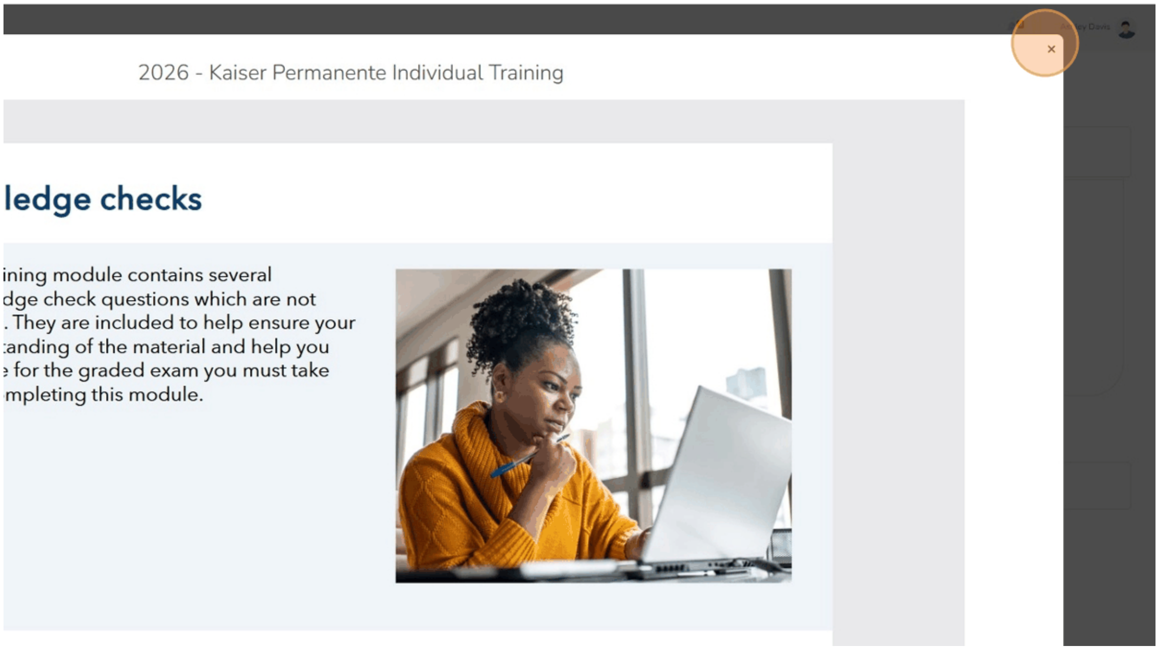
28. This will open the training program.



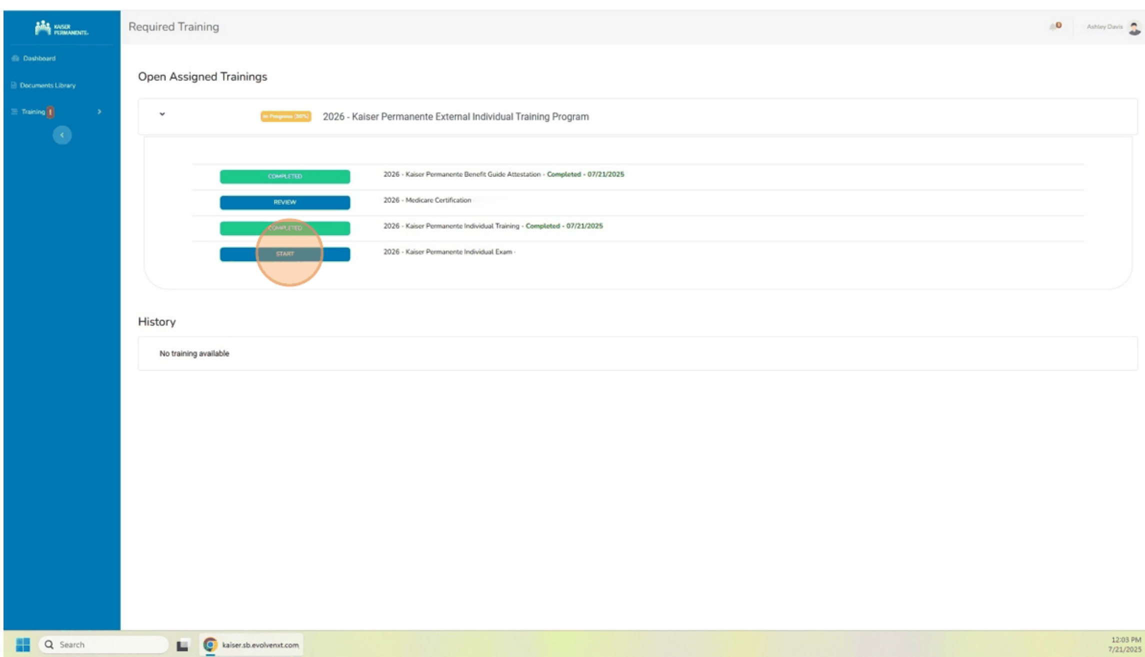
29. Use the NEXT and PREV arrows to navigate the training program.



30. There will be knowledge checks through the training. They are not graded. When you have completed the training, click the X at the top of the window to go back to the Required Training page.

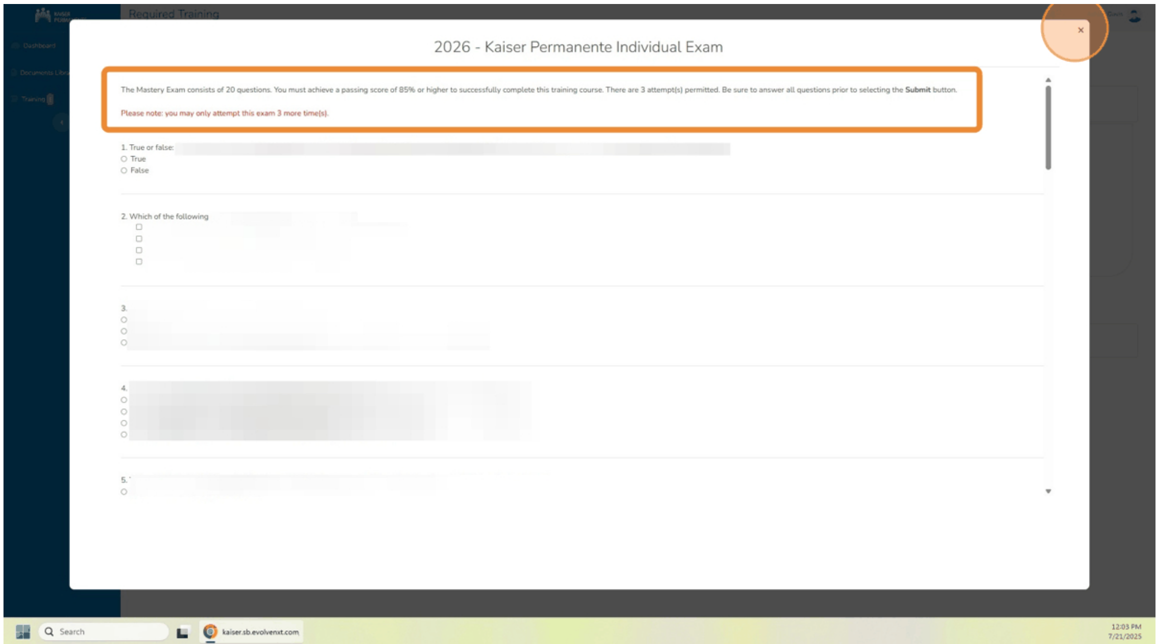


31. When you have completed the training, you can click START next to the exam.

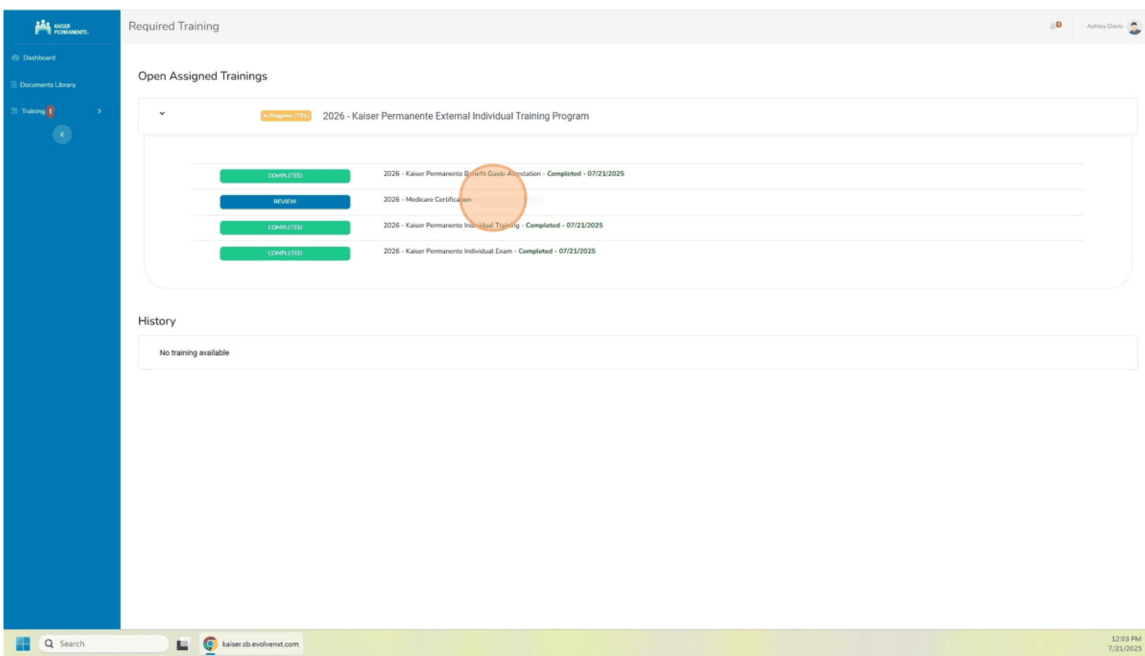


32. There are twenty questions on the exam, and you must receive at least 85% to pass. There are three attempts available. A fourth attempt can be granted upon request. If you

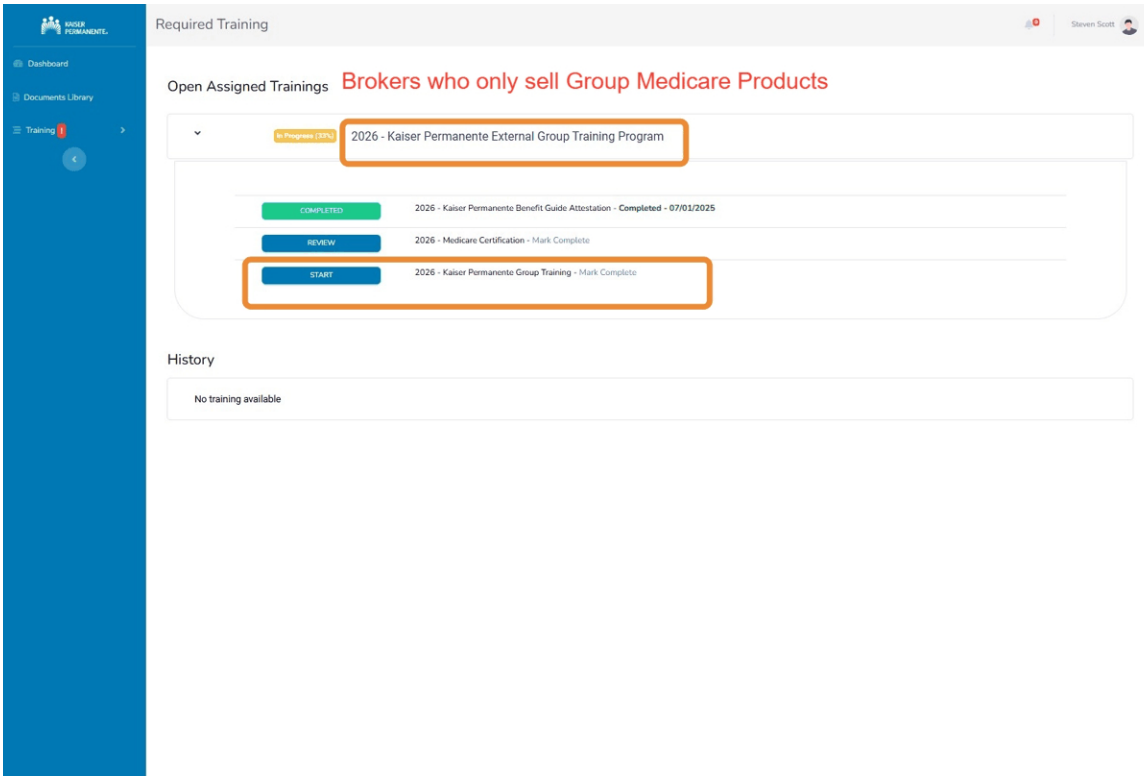
close the exam after it is open, it WILL save progress. When you have finished, click the X at the top of the window and go back to the Required Training Page.



33. The Medicare Certificate module will complete when the data from AHIP is received electronically.

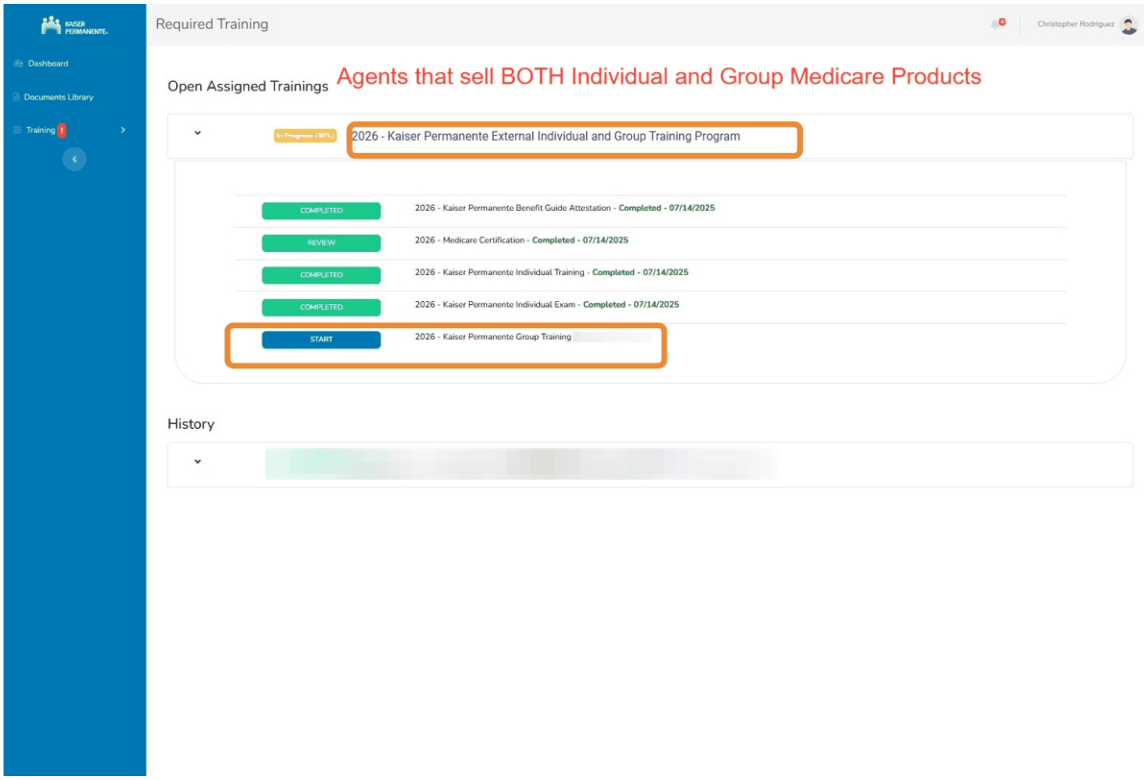


34. NOTE- BROKERS WHO HAVE BEEN IDENTIFIED TO SELL ONLY GROUP PRODUCTS WILL HAVE ONLY THE GROUP TRAINING MODULE ON THE REQUIRED TRAINING PAGE. Click Start next to that module and complete it. There is no exam for this module.

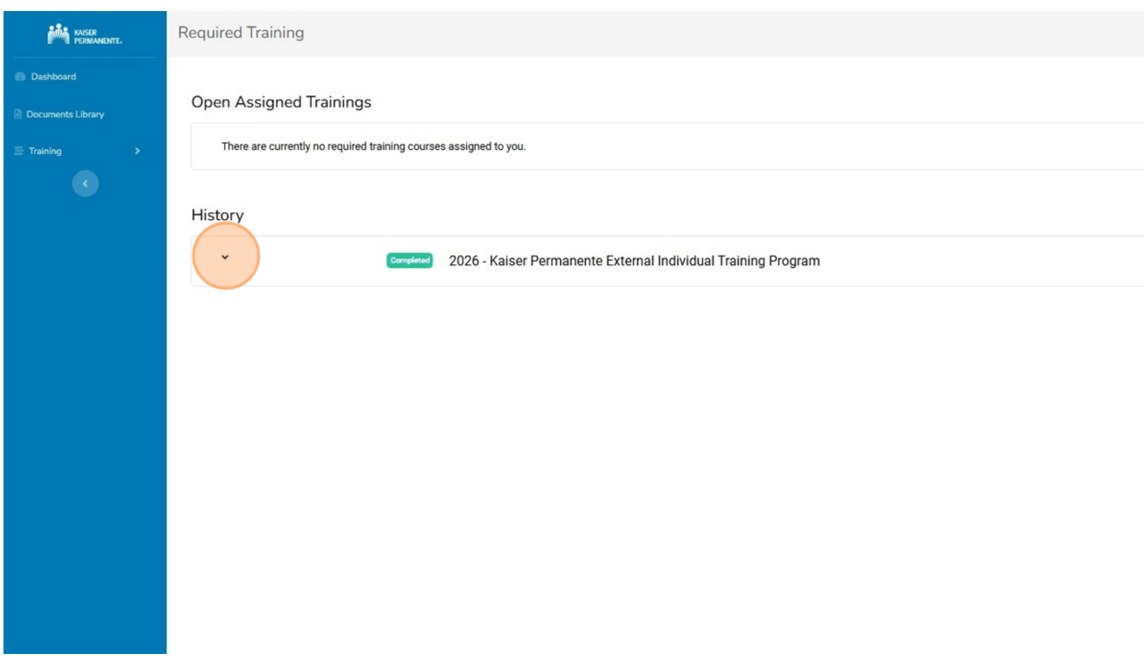


35. NOTE- BROKERS WHO HAVE BEEN IDENTIFIED TO SELL BOTH INDIVIDUAL AND GROUP PRODUCTS WILL HAVE BOTH INDIVIDUAL AND GROUP TRAINING MODULE ON THE REQUIRED TRAINING PAGE. These agents will follow the above steps and then

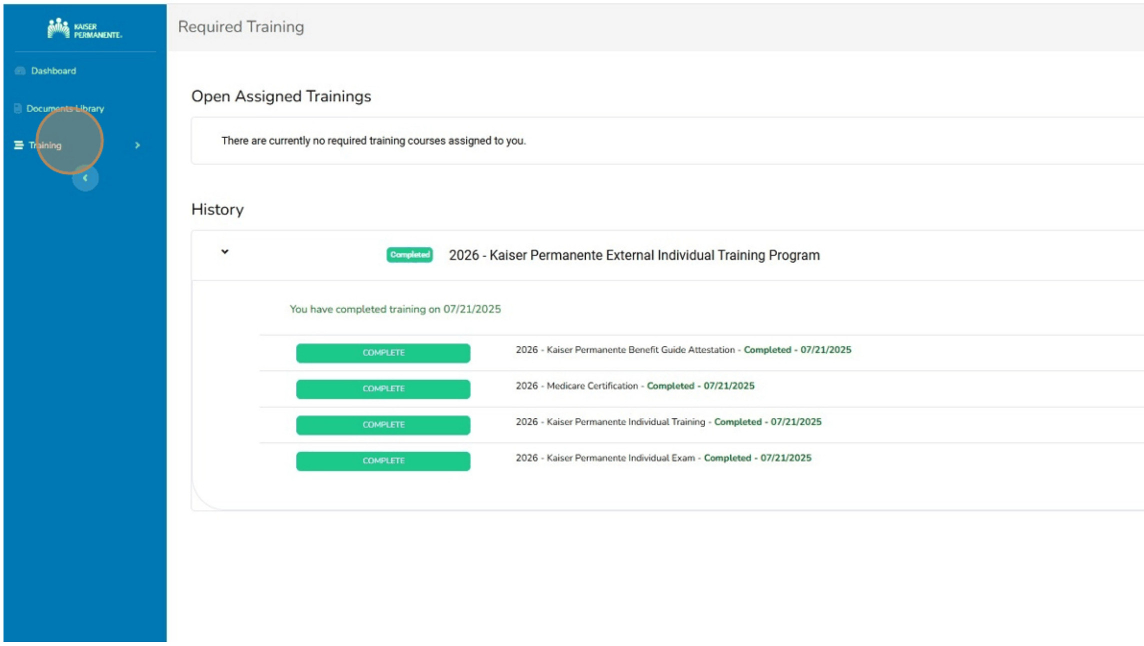
click Start next to the Group training module and complete it. There is no exam for this module.



36. When all the modules are complete, the training program will move to the HISTORY of the Required Training Page



37. Each module will have a completion date. The navigation panel will no longer have the red '!'.



38. The Dashboard will show the Training is Complete