HealthSpring

Evolve Guide for MAPD/PDP Agencies

Job aid for HealthSpring MAPD/PDP agencies for navigating Evolve

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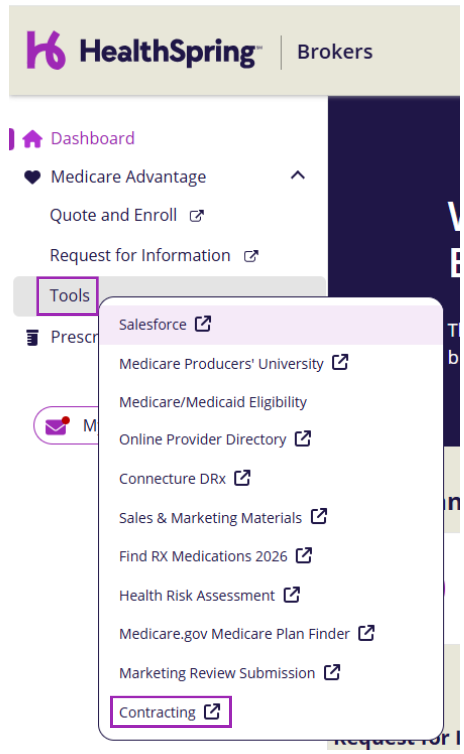
Note: Within the Evolve system, you may see references to CSB. As part of a branding update, **CSB is transitioning to HSB**. Both terms may appear during this transition period.

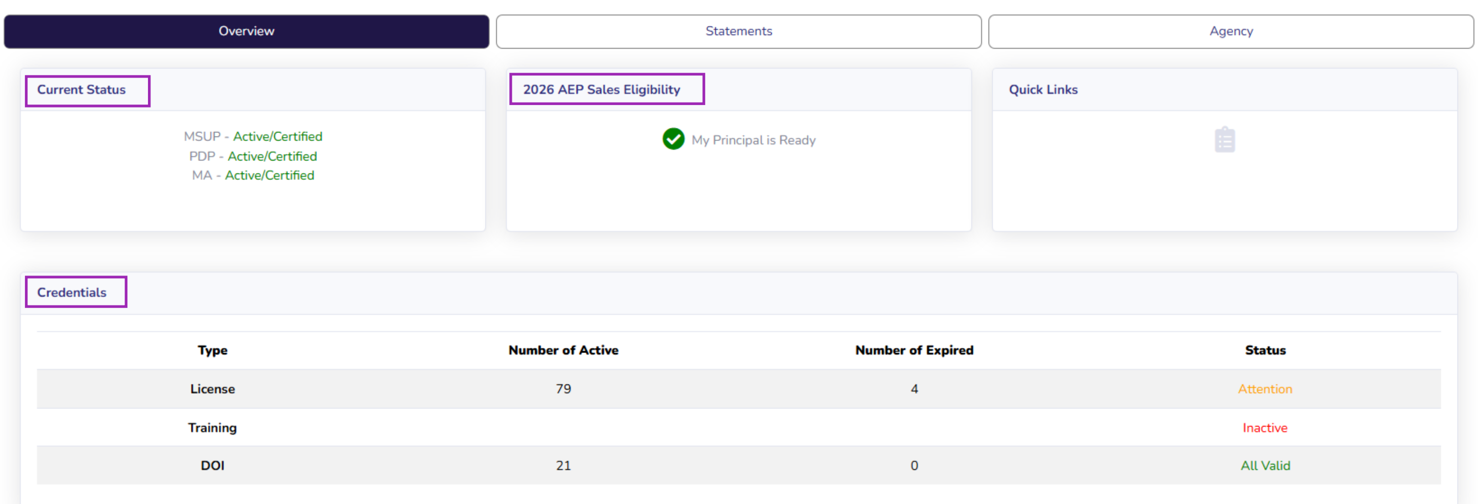
Agency Dashboard

From the HealthSpring for Brokers (HFB) portal, click **Tools** then click **Contracting** to access the Evolve platform (for HFB login issues, please email ARCMAPD@HealthSpring.com or call **866-442-7516**). Evolve will open in a new tab.



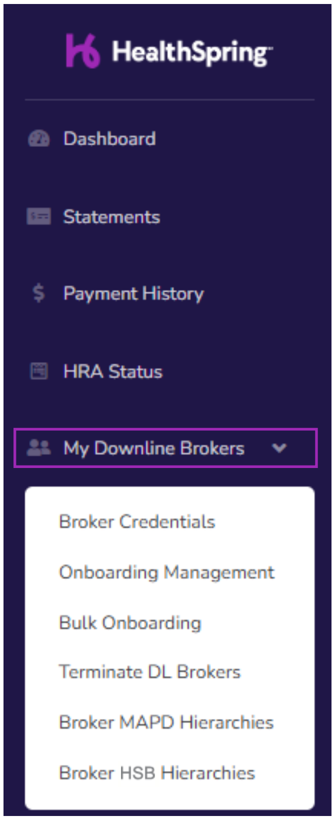
Menu options under Tools may vary based on access type/level.

Upon logging in, Evolve will default to the Agency Dashboard which provides a basic overview of the agency's information (e.g., current status by LOB, principal RTS status, license information, etc).



My Downline Brokers

All information related to current downlines, including onboarding options and statuses, can be found under **My Downline Brokers**.



Broker Credentials

This section provides access to specific downline credentialing information broken out into the below categories. This is also where MAPD recruiting access can be enabled or disabled.

- Current rep status
- License information
- Training information
- Appointment information

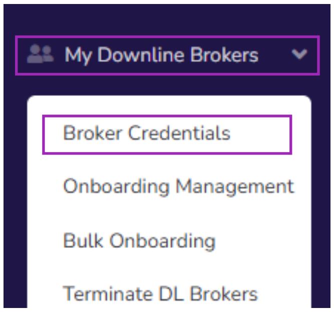
A full list of all downlines can be pulled for each individual category or specific downlines can be pulled by searching name and/or NPN.

Update MAPD Recruiting Access

MAPDP recruiting access for downline agencies defaults to inactive so must be turned on for every downline agency granted permission to recruit. Turning recruiting access on for an agency also provides access for that agency to grant recruiting access to any of their downline agencies.

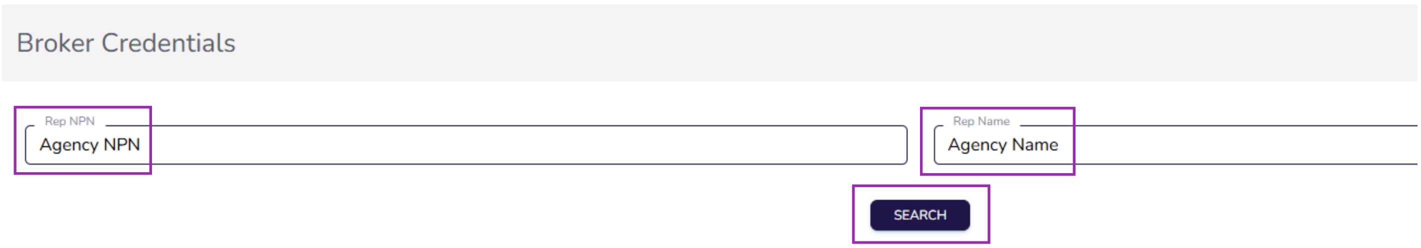
To update a specific agency's MAPD recruiting status:

1. Navigate to **My Downline Brokers** then **Broker Credentials**.

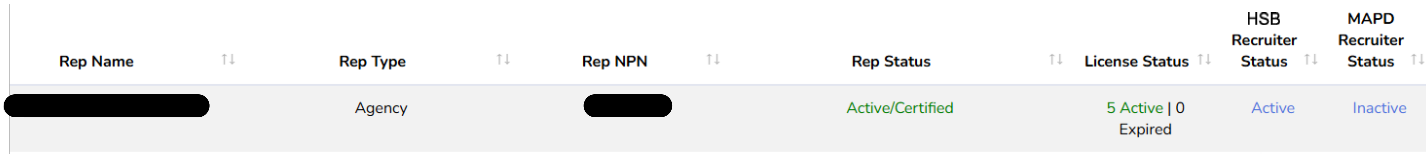


Update MAPD Recruiting Access [cont'd]

2. Search for the applicable agency by name or NPN.



3. In the far-right column, under MAPD Recruiter Access, click the **Active** or **Inactive** status to change the current status.



Rep Name	Rep Type	Rep NPN	Rep Status	License Status	HSB Recruiter Status	MAPD Recruiter Status
[redacted]	Agency	[redacted]	Active/Certified	5 Active | 0 Expired	Active	Inactive

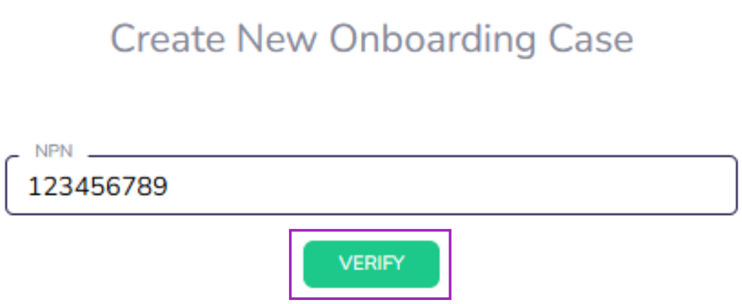
Onboarding Management

For single onboarding cases, click on **Onboarding Management** to open the Onboarding Management screen. All previously submitted onboarding cases will be listed here. New cases can be created by clicking **Create Individual Invite**, and a full list can be downloaded by clicking **Download**. For creating multiple cases at once, click on Bulk Onboarding to open the Bulk Onboarding screen.

Creating a New Onboarding Case

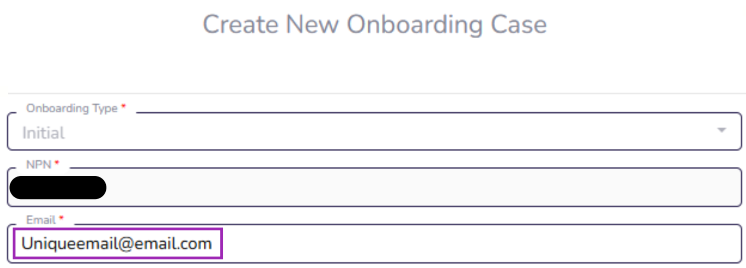
1. Click **Create Individual Invite** to open the case creation screen.

2. Enter the producer's NPN then click **Verify**. If the agent is eligible to be onboarded, the **onboarding type** will generate appropriately as either **Initial**, **Reonboarding**, or **Add LOB**.

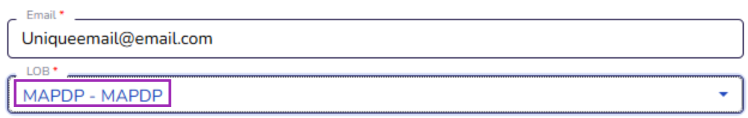


Creating a New Onboarding Case [cont'd]

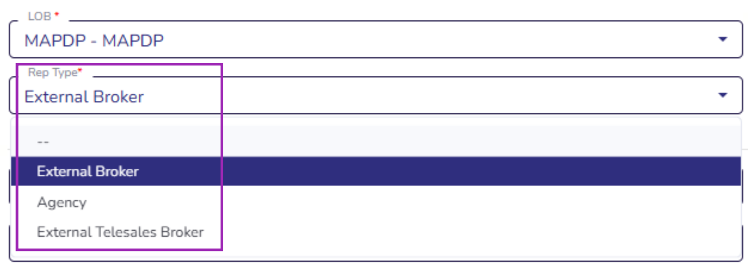
3. Enter the producer's email address in the **Email** field (email addresses must be unique for each producer).



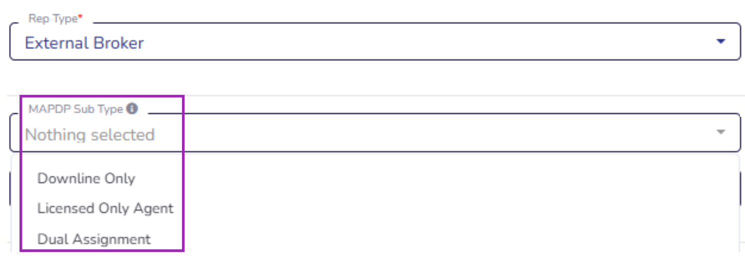
4. Select the appropriate LOB in the **LOB** field.



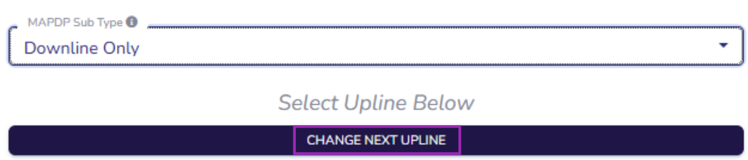
5. Select the appropriate Rep Type in the **Rep Type** field (producers cannot have different rep types across LOBs so, if they are telesales for HSB, they must be telesales for MAPD/PDP and vice versa).



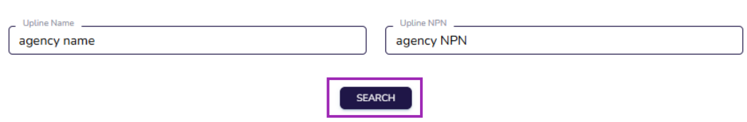
6. Select the appropriate Sub Type in the **MAPDP Sub Type** field.



7. Click **Change Next Upline** under **Select Upline Below** to enter the direct upline agency.

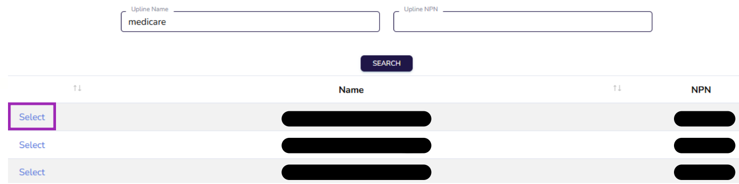


8. Enter either the upline agency's name or NPN then click **Search** to generate a list of available uplines.

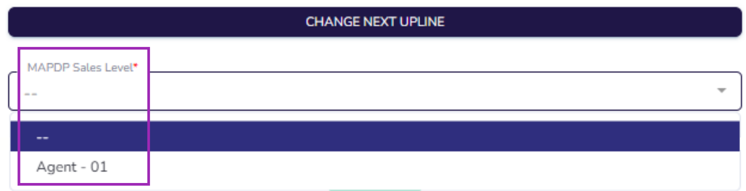


Creating a New Onboarding Case [cont'd]

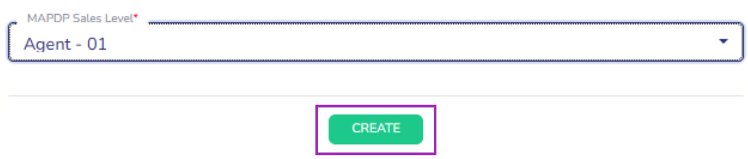
9. Click **select** next to the appropriate upline agency.



10. Select the appropriate Sales Level for the producers in the **MAPDP Sales Level** field (brokers will only have **Agent – 01** as an available option).



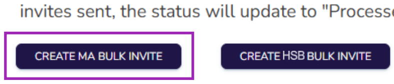
11. Click **Create** to finish creating the case. An email will be sent immediately to the email address entered for the broker/agency with instructions detailing how to access their contracting case and the link to HealthSpring for Brokers.



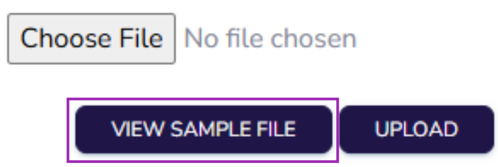
Creating a Bulk Case Creation File

1. Click on **Create MA Bulk Invite**.

Note: Bulk onboarding files are processed every 10 minutes. Until a bulk file is picked up for processing, it will show as "Pre Processing /Pending." Once the file is picked up and invites sent, the status will update to "Processed."



2. Click on **View Sample File** to open the template.



3. Enter all required information with no trailing spaces or links in the applicable column (**agency_npn** will be the direct upline agency's NPN) for all producers cases are needed for (secondary_email is optional).

npn	email	secondary_email	broker_type	broker_sub_type	sales_level	agency_npn	lob	manual_case
12345678	example@email.com		External Broker	Downline Only	1	12345678	MAPDP	n

Creating a Bulk Case Creation File [cont'd]

4. Save the file in **csv** format.
5. Click **Choose File** to attach the saved file.
6. Click **Upload** to process the file.

Bulk files are picked up for processing every 10 minutes. The file will appear in **Pre Processing/ Pending** status until it is picked up. Once the file is picked up, the status will change to **Processed**.

Once processed, the results will appear under **New Rows** or **Error Rows** to provide the number of rows successfully processed vs the number of rows that were not processed due to an error.

File Type	File Name	Status	New Rows	Error Rows	User Name	Loaded
MAPDP/EGWP	Copy of Bulk Case Creation Template - Copy.csv	Processed	0	6	[redacted]	12/22/2025 1:43 PM
MAPDP/EGWP	Copy of Bulk Case Creation Template - Copy.csv	Processed	0	6	[redacted]	12/22/2025 1:42 PM

For any rows with an error, click on the number in the **Error Rows** field to view a list of which NPNs errored out with the applicable error message.

Bulk Error Report

10 entries

Line Number	NPN	Errors
2	[redacted]	Rep NPN already exists
3	[redacted]	Rep NPN already exists, Email already exists
4	[redacted]	Rep NPN already exists
5	[redacted]	Rep NPN already exists, Email already exists
6	[redacted]	Rep NPN already exists, Email already exists
7	[redacted]	Rep NPN already exists, Email already exists

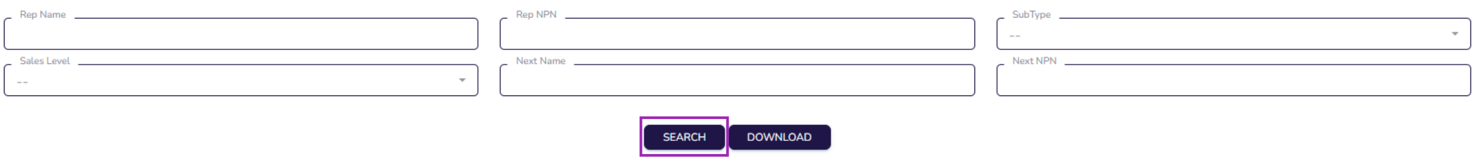
There are no row limits applicable to the Bulk Case Creation file but larger files will take longer to process than smaller files.

Terminate DL Brokers

Due to DOI laws related to termination notification requirements, this section is only available for Supplemental at this time. For all MAPD/PDP terminations, those requests will still be submitted via email to ARCMAPD@HealthSpring.com with the producers' full name, NPN(s), and reason for termination included.

Broker MAPD Hierarchies

This section provides a quick view of MAPD/PDP downlines' direct upline agencies. Click **search** with no filters selected to pull a full list that can be downloaded, search for specific brokers, all brokers by subtype or sales level, or search for all brokers/agencies under a specific upline.

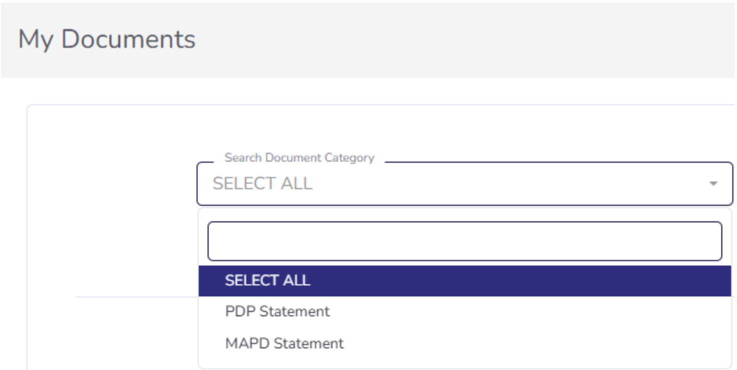


Broker HSB Hierarchies

This section provides the same functionality as above with Supplemental downlines.

My Documents

This section contains commissions statements broken out by MAPD Statements and PDP Statements.



My Credentials

This section provides information related to the agency's certification cases, status & credentials, sales states, and HSB appointment info.

My Certification Cases

This is where any pending cases submitted for the agency would appear. For topline agencies, this section will typically be blank.

My Status & Credentials

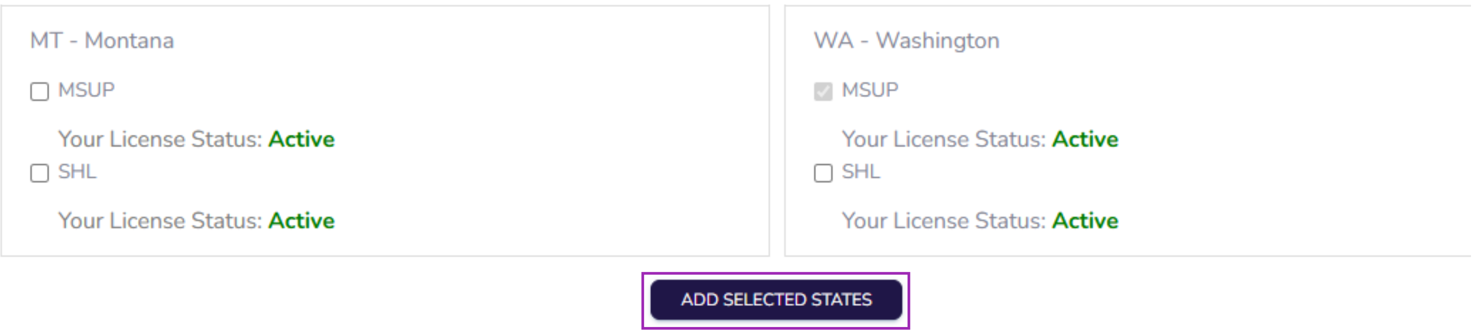
This section provides detail for the agency's status, states & licenses, training info, contract info, and appointment info across all lines of business the agency is currently contracted for broken out by category.

My Status Info | Sales States & Licenses | Training Info | Contract Info | Appointment Info

LOB	Rep Status
MGAP	Active/Certified
SHL	Active/Certified
MA	Active/Certified
PDP	Active/Certified

Manage My Sales States

This is where new pre-appoint states can be declared for the agency. To declare a new state, click on the state(s) that need to be added then click **Add Selected States**. This will submit the appointment(s) for the agency.



Just in Time states are listed at the bottom of the page with current license status for each state listed by product line.

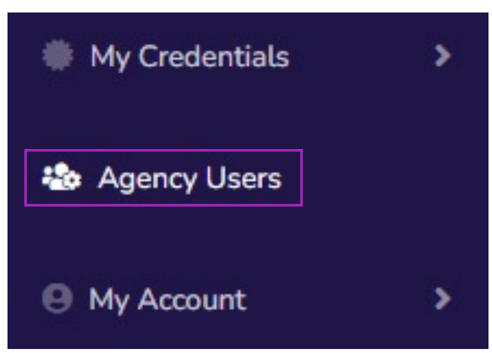
HSB Appointment Info

This section is specific to Supplemental, so MAPD/PDP is unable to provide additional detail surrounding this section.

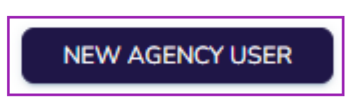
Agency Users

New Agency Users can be added with specific or all permissions from the Agency Users tab.

1. Click **Agency Users**.



2. Click **New Agency User**.



Agency Users [cont'd]

3. Enter all required information.

New Agency User

Agency Principal
[redacted]

First Name: First Name
Last Name: Last Name

Date of Birth: 01/01/1960
Email: email@email.com
Phone: 1234567890

4. Select desired permissions.

Support Permission(s)

- ○ Recruiter ONLY
- ○ Agency Admin ONLY
- ○ Recruiter + Agency Admin
- ○ Recruiter + Agency Admin with Commissions

5. Review the attestation information that generates based on the selected Support Permission(s).

Support Permission(s)

- ○ Recruiter ONLY
- ◉ Agency Admin ONLY
- ○ Recruiter + Agency Admin
- ○ Recruiter + Agency Admin with Commissions

External Admin Attestation Language:
I (Principal/Authorized Agent) am granting access to the information contained on HealthSpring for Brokers to the Administrator in order to review certain information of the Company. I understand that by doing so, I am subject to the following conditions: All of the information on this site is considered confidential. It is my responsibility to safeguard this information in compliance with confidentiality and HIPAA regulations, as defined in my Agent Agreement with the company. I fully understand that granting this access on HealthSpring for Brokers will allow all agent data associated with the above NPN, TIN, or Federal Employer Identification Number (FEIN) to be viewed. I fully understand it is my responsibility to inform HealthSpring immediately if the Associated User is no longer affiliated with my agency. By attesting below, I acknowledge that I (Principal/Authorized Agent) have read, understand, and agree to the above conditions.

☐ Approve

Agency Users [cont'd]

6. Check the **Approve box** for each applicable permission then click **Add User** to finalize.

External Admin Attestation Language:

I (Principal/Authorized Agent) am granting access to the information contained on HealthSpring for Brokers to the Administrator in order to review certain information of the Company. I understand that by doing so, I am subject to the following conditions: All of the information on this site is considered confidential. It is my responsibility to safeguard this information in compliance with confidentiality and HIPAA regulations, as defined in my Agent Agreement with the company. I fully understand that granting this access on HealthSpring for Brokers will allow all agent data associated with the above NPN, TIN, or Federal Employer Identification Number (FEIN) to be viewed. I fully understand it is my responsibility to inform HealthSpring immediately if the Associated User is no longer affiliated with my agency. By attesting below, I acknowledge that I (Principal/Authorized Agent) have read, understand, and agree to the above conditions.

☑ Approve

Proxy Recruiter Attestation Language:

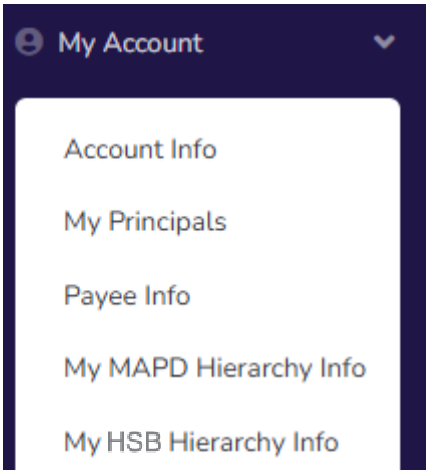
By and between the Recruiter (noted Below) and the Company (herein defined as Loyal American Life Insurance Company for itself and its affiliated companies), I authorize the above name proxy to act as a recruiter on my behalf in EvolveNXT to recruit new agents. Proxy has my permission to view and approve recruit�s applications to be contracted with Company, by applying my attestation to said applications. I acknowledge and agree that said electronic attestation will be equally binding on me and my agency as if I had signed the recruit�s applications myself. I further acknowledge and agree that my attestation entered by my designated proxy shall apply to the following personal guarantee that is part of the recruit`s application to the Company: In consideration of the Company executing this application at my request, the undersigned does personally guarantee the performance of all terms, conditions and covenants of the Associate's Agreement, including the Associate Promissory Note and Associate Advance and Pledge Agreement attached to this Application and assumes personal liability and responsibility for any default in said terms, conditions and covenants. I understand that any and all commissions, both first year and renewal owing to me now or in the future under any contract I have entered into with the Company and its affiliates are hereby assigned as security for the repayment of sums guaranteed by my endorsement hereon and that I am personally responsible upon demand for monies owing hereunder. This guarantee shall survive the termination of any contractual relationship between the affiliates of the Company and the Agent or Up-Line Recruiting Agent.

☑ Approve

ADD USER

My Account

This section contains information related to the agency's demographics.



Account Info

The agency's phone number and address is located and editable here. To change any applicable information, click **Edit Account Info**, make any necessary changes, then click **Save**.

My Principals

The agency's principal information (across all LOBs) is listed here. Principals can be removed or added at any time. Please note that principals can only be removed if there is more than one listed as all agencies are required to have a contracted, certified principal.

My MAPD Hierarchy Info

The agency's current and past MAPD/PDP hierarchies are shown here with levels and dates included.

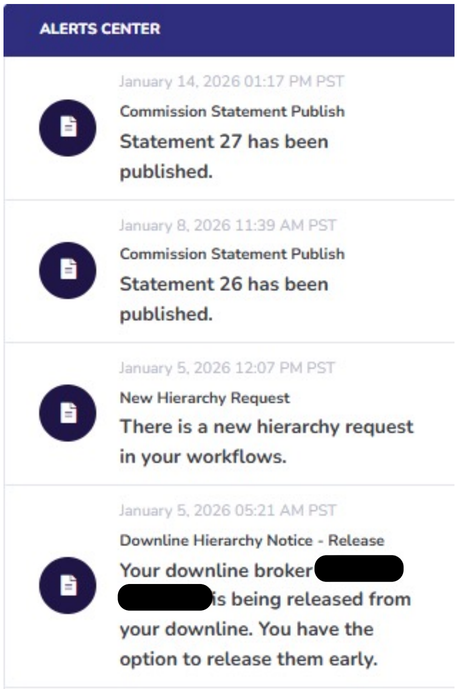
My HSB Hierarchy Info

The agency's current and past Supplemental hierarchies are shown here with levels and dates included.

Workflows

Hierarchy requests that the agency needs to review will appear in the Alerts Center in the top right of the agency portal (indicated by a red number notification) and in the Workflows tab.

Details of the request can be viewed by clicking on the message in the Alerts Center list or by clicking on Workflows in the left-hand menu.



Workflows [cont'd]

Clicking on View next to the request will provide additional detail and allow agencies to Release/Accept the request if the agency chooses to do so.

	Type	Status	Requestor	Approver	Execution Date	Last Updated
View	Hierarchy - MAPDP	Pending	[redacted]	[redacted]	2026-04-14	01/14/2026 01:20 PM PST
View	Hierarchy - MAPDP	Pending	[redacted]	[redacted]	N/A	01/14/2026 10:29 AM PST

Workflows with the Accept button are producers requesting to move under the agency.

Workflow Comments | Workflow Information

Comment	User	Date	File
The broker [redacted] is requesting to join [redacted] as Downline Only sub type.	[redacted]	01/14/2026 01:20 PM PST	

Previous 1 Next

You have the option to approve or deny **CHARMAGNE PRESTON** joining your hierarchy as a **Downline Only** broker.

Add a comment to this workflow request:

ACCEPT

Workflows with the Release button are producers requesting to move away from the agency.

Workflow Comments | Workflow Information

Comment	User	Date
Hierarchy change will execute after the initial hold period.	Monika Sylvester	01/14/2026 01:27 PM PST

[redacted] has completed a hierarchy change workflow and is scheduled to leave your hierarchy on **2026-04-14**.
You have the option to grant [redacted] an early release from your hierarchy.
If you chose to release the broker now then the hierarchy change would take effect on **2026-01-16**.

Add a comment to this workflow request:

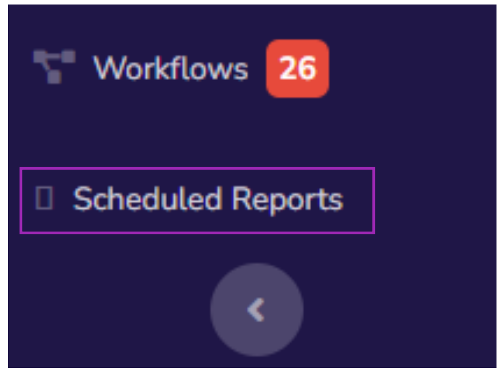
RELEASE

Important note: Direct upline agencies will be notified of any requests from an agent to move to or away from their hierarchy but only the top of hierarchy (aka topline agency) will be presented with the workflow to approve/deny or release a producer.

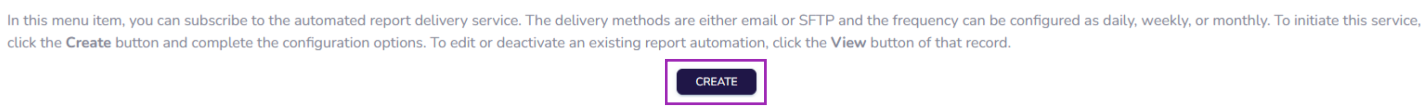
Scheduled Reports

Agent Status Reports for all lines of business can be scheduled from the **Scheduled Reports** tab.

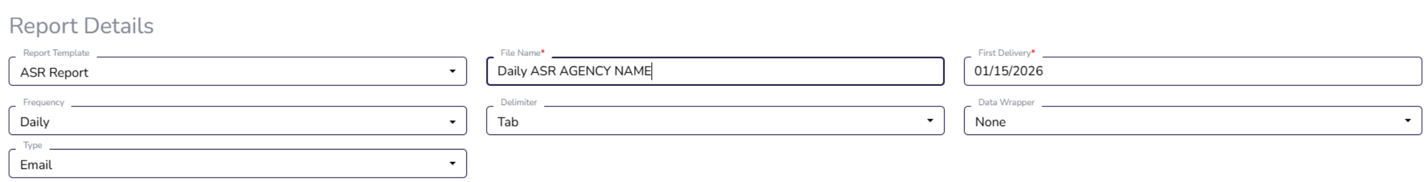
1. Click **Scheduled Reports**.



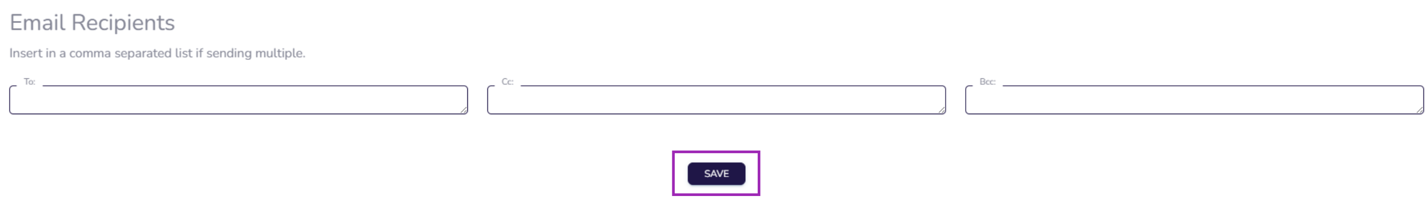
2. Click **Create**.



3. Select the desired template, the name preferred for the file, first delivery date, frequency, format (csv or text), data wrapper preference, delivery type (email or FTP) in Report Details.

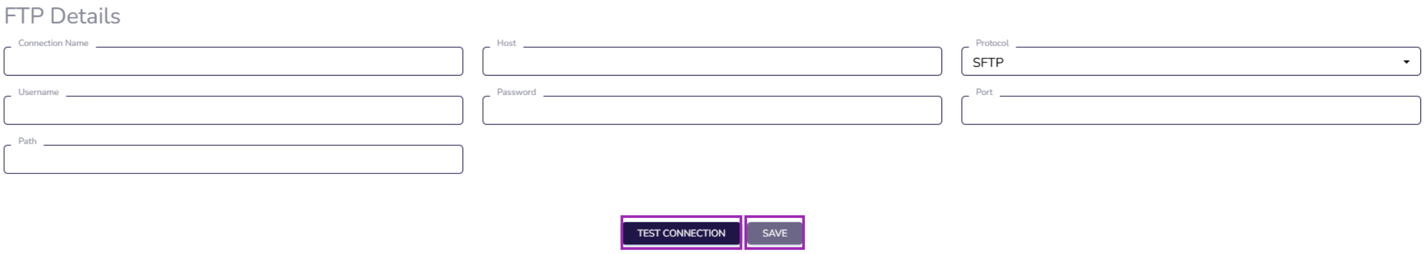


4. If email delivery is selected, enter the email address for all intended recipients and click **Save**.



Scheduled Reports [cont'd]

5. If FTP delivery is selected, enter all required FTP Details and click **Test Connection** (once connection has been confirmed, click **Save**).



Multiple reports of multiple types can be scheduled.

Name	Active	Type	Frequency
HSB External Recruit Progress	Yes	Email	Daily
HSB External RTS	Yes	Email	Daily
MA External Recruit Progress	Yes	Email	Daily
MA External RTS	Yes	Email	Daily

Helpful Information

Change Request Limitations

Within Evolve, the upline/topline is unable to initiate the following requests:

- Hierarchy changes for existing producers
- Pay level changes for existing brokers (excluding agency upgrades)
- Appointment adds for downline producers
- Address or payee changes for downline producers

These change requests are now self-service and must be submitted by the producers from their individual portals. Instructions for submitting those changes are included in the Evolve Guide for Agents.

Common Onboarding Case Errors

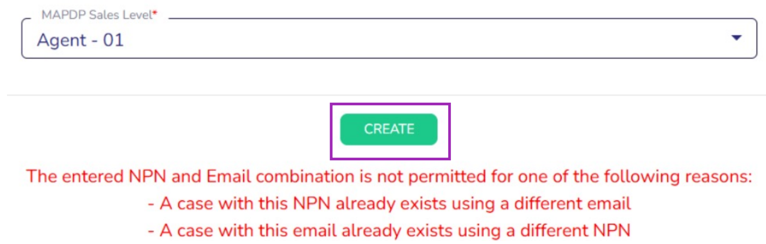
EvolveNxt does not allow onboarding cases to be initiated in the following scenarios:

- Producer is currently contracted (either under your agency or another agency)
- Producer already has an onboarding case initiated for them for the same LOB
- Producer is on the NPN Exclusion List
- Producer is contracted for Supplemental with a rep type that does not allow standard onboarding (Senior Private Exchange, Bulk Uploaded, or Internal)

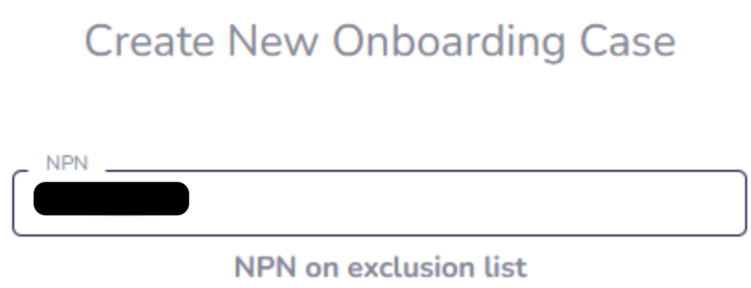
Common Onboarding Case Errors [cont'd]

If a producer is already contracted, the onboarding case being initiated will not permit selection of the applicable LOB. This indicates the producer should log into their portal to request a hierarchy change. This issue is indicated by the absence of the MAPDP – MAPDP option in the LOB dropdown.

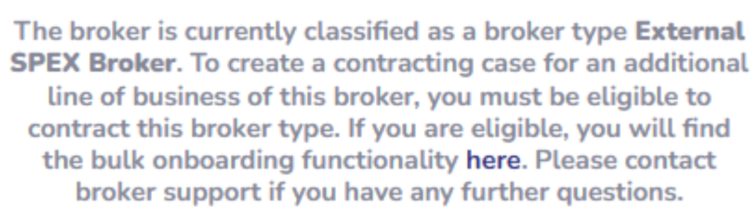
If a producer already has an onboarding case initiated for them for the same LOB, another one cannot be initiated. This issue is indicated with the below verbiage that will generate after entering all applicable information and clicking **Create**.



If a producer is on the NPN Exclusion List, a message indicating that will appear next to the NPN Field when the NPN is entered. In those cases, the producer must email ARCMAPD@HealthSpring.com for additional information and/or to request removal from the list.



If a producer is contracted for Supplemental with a rep type that does not allow standard onboarding, the producer cannot be onboarded until/unless they are no longer contracted under that hierarchy for Supplemental. Supplemental-related inquiries should be submitted to ARCSHL@HealthSpring.com. This issue is indicated by the below error message and will display the specific broker type the agent is contracted as.

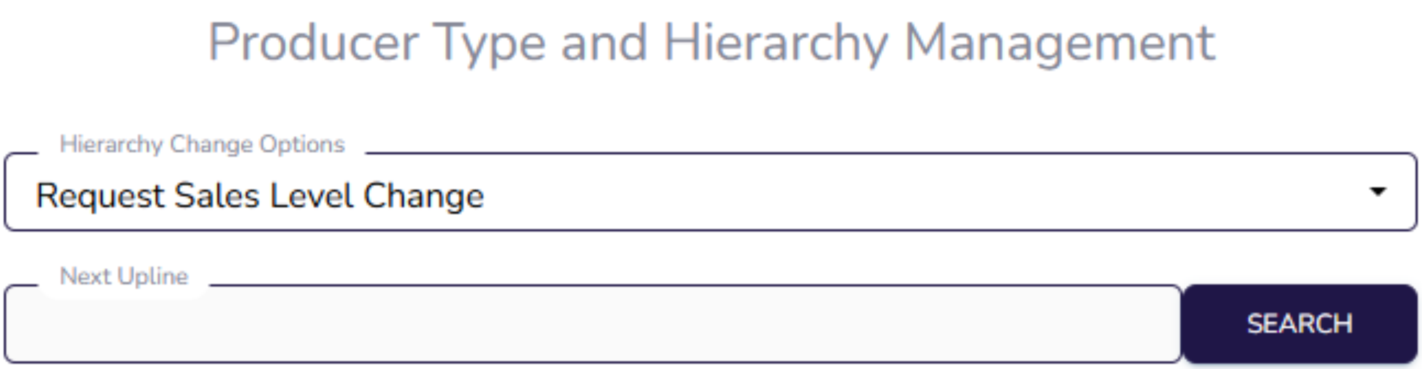


Agency Upgrades

Agency upgrades can be submitted within Evolve only after the agency has worked with their HealthSpring MAPD/PDP Sales team to obtain approval. Once approved, the agency will be provided with a signed Agency Upgrade Approval form. Please note the completed, signed form must be uploaded with the agency upgrade request; otherwise the request will be denied.

Upgrades are requested from **My Downline Brokers** then **Broker MAPD Hierarchies**.

1. Locate the agency approved for upgrade in the Broker MAPD Hierarchies section by searching their name and/or NPN.
2. Click the **change** button next to the agency's row.
3. In the Producer Type and Hierarchy Management box, select **Request Sales Level Change** from the Hierarchy Change Options dropdown then enter the requested direct upline.



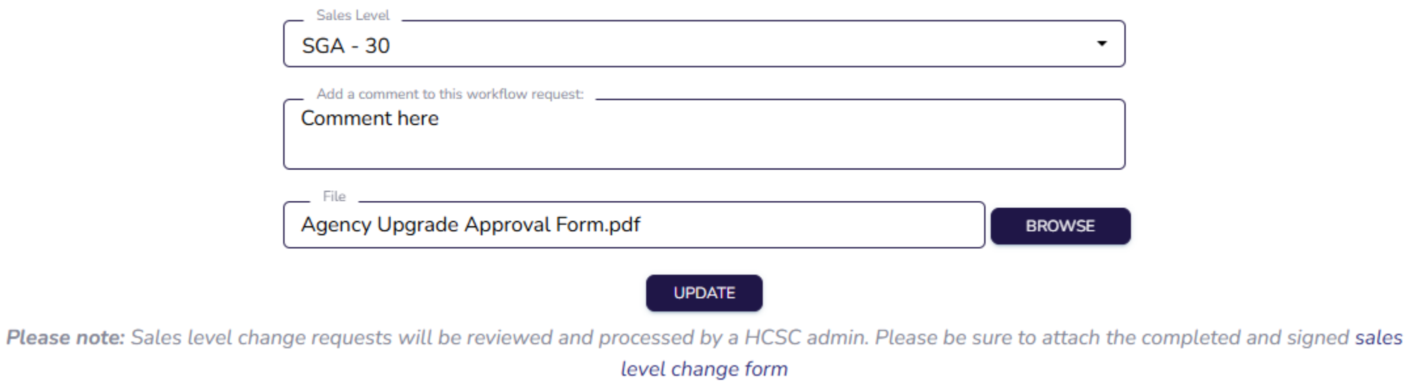
4. Choose the requested agency level in the Sales Level dropdown.

Please ensure the requested level matches the approved level listed on the form. If the levels do not match, the request may be denied.

5. Add any applicable comments (optional).

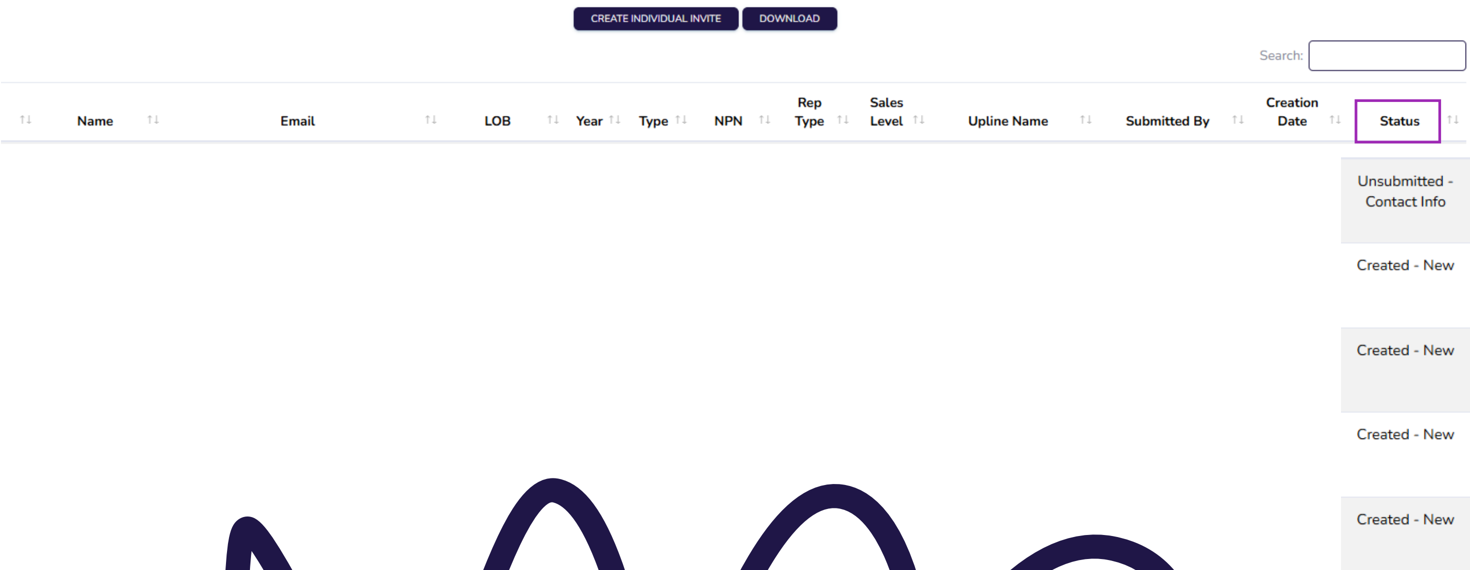
Agency Upgrades [cont'd]

6. Click **Browse** to upload the signed Agency Upgrade Approval form.
7. Click **Update** to submit the request to the Contracting queue for review.



Onboarding Case Statuses

Case status detail can be found in the agency portal under **My Downline Brokers** then **Onboarding Management** in the status column on the far right.



Onboarding Case Statuses [cont'd]

Created – New: Case was sent to producer; producer has not accessed it.

Unsubmitted – (Contact Info, Additional Info, etc): Producer started data entry but has not completed it. Data after the hyphen indicates where producer stopped.

Aborted by Rep: Producer declined the contract (follow up with producer).

Cancelled: Case cancelled by the submitting agency or Contracting admin.

Correction Requested: Incorrect/missing information; case was sent back to producer for correction.

Denied: Case was denied by Contracting admin (reason for denial will be included in workflow).

Returning Broker Check: Pending review of re-contracting eligibility.

Pending Check: Pending background investigation completion.

Review – BG Check: BI review in progress.

Failed Background Check: Background investigation graded as a fail.

Approved: Case has moved through all checks and is approved.

Glossary

Case ID: Unique ID number used to identify each Onboarding Request submitted.

Declared Sales State: Pre-appoint state the producer has declared they will be selling in.

Direct: Broker contracted direct to HealthSpring MAPD/PDP.

Hierarchy CR Portal: Hierarchy change portal.

LOB: Line of Business.

Manual Review Queue: Contracting cases that need to be manually reviewed by a Contracting admin.

NPN Exclusion List: List of producers with Do Not Contract status.

Rep ID: Producer's NPN; currently also includes legacy MAPD/PDP writing numbers and HSB writing numbers (if applicable).

Rep Type:

- **External Telesales Broker**: Broker selling telephonically (previously External Telesales).
- **External Broker**: Broker selling in person (previously External Field).
- **Bulk Uploaded Broker**: Broker contracted under a bulk approved agency that is not a Senior Private Exchange Agency.
- **External SPEX Broker**: Broker contracted under a bulk approved Senior Private Exchange Agency.

Rep Sub Type:

- **Downline Only:** Broker paid directly (previously level 5 – direct pay).
- **Dual Assignment**: Broker assigning commissions to direct upline (previously level 8 – AOC).
- **Licensed-Only Agent (LOA)**: Broker paid salary by their agency, not eligible for commissions per sale, upline owns the broker's BOB (previously level 11 – LOA).

Rep Status:

- **Master Status**: Combined status between LOBs.
- **LOB Status**: Current status by LOB.