

2026 - 2027

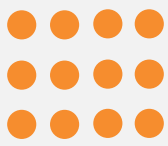
# Broker Onboarding, Recertification, & Portal Guide



# Table of Contents

- Onboarding: New Agents ..... 3**
  - New Broker Invitation ..... 4
  - New Broker Process ..... 5
  - Assigned Product Training ..... 11
  - Product Exam ..... 14
  - Onboarding Status ..... 22
- Recertification: Current Partners ..... 23**
  - Current Partner Invitation ..... 24
  - AHIP Prompt ..... 26
  - Assigned Product Training ..... 31
  - Product Exam ..... 32
- Broker Portal ..... 40**
  - Ready to Sell Status ..... 43
  - Book of Business ..... 51
  - Application Status ..... 52
  - My Credentials ..... 54
  - My Account ..... 58
  - My Hierarchy Info ..... 61
  - Workflows ..... 67
  - Agency Features ..... 68
- Broker Support Contact Information ..... 78**





# Onboarding

[New Broker Invitation](#)

[New Broker Process](#)

[AHIP Prompt](#)

[Assigned Product Training](#)

[Product Exam](#)

[Onboarding Status](#)

# Onboarding: New Broker Invitation

Once an onboarding invitation has been generated, you will receive an email from [donotreply@evolvenxt.com](mailto:donotreply@evolvenxt.com). You will need the link in your email to navigate to the site using your credentials in the email.

Note: New onboarding invitations expire after 90 days. If the process is not completed within the timeframe, a new case will be required.

From: donotreply@evolvenxt.com  
Subject: Zing Health Onboarding Invitation

You are invited to contract with Zing Health to market our Medicare Advantage plans.  
To begin, please complete your onboarding workflow using the credentials and link below:

URL: <https://zing.evolvenxt.com/login.htm>

Login email address: {email}  
Password: {temporary password}

Please note: This invitation will expire within 90 days. If the process is not completed within that timeframe, your link will deactivate, and you will be required to start over.

**IMPORTANT:** Before you can be marked as Ready to Sell (RTS), you must transmit your AHIP certification to Zing Health using the following link:  
<http://ahipmedicaretraining.com/clients/zinghealth>

If you have trouble accessing the registration portal, please use the Lost Password function.  
For further assistance, contact us at [Brokers@myzinghealth.com](mailto:Brokers@myzinghealth.com) or call 844-946-4226 (Monday–Friday, 8 AM – 5 PM CT).

If you are unsure why you are receiving this email, please reach out to your recruiting agency.  
We look forward to partnering with you!  
Thank you,  
Zing Health



# Onboarding: New Broker Process

Once logged in, you will see your onboarding case. Before proceeding, verify your Broker Type and Broker Sub Type are accurate. If you have questions, on either, please reach out to your upline for assistance. If you are an Agency Principal, you will complete this step for your agency first, and then for you as an individual broker.

If all information is accurate, select "START" to begin.

EVOLVENXT My Certification Cases

Search by Names:

|              | LoB                | Type    | Status        | Email | NPN | Broker Type  | Broker Sub Type | Sales Level | Name | Upline Name | Creation Date | Email Send Date | Year | Submitted By |
|--------------|--------------------|---------|---------------|-------|-----|--------------|-----------------|-------------|------|-------------|---------------|-----------------|------|--------------|
| <b>START</b> | Medicare Advantage | Initial | Created - New |       |     | Field Broker | Downline Only   | Agent - 01  |      |             | 06/23/2026    | 06/23/2026      | 2027 |              |

Showing 1 to 1 of 1 entries

## Sub Type Description

Your Sub Type dictates how your are paid. This should be confirmed annually with your upline.

- **Downline Only** - Broker has an upline, broker receives their own commissions.
- **Licensed Only Agent** - Broker has an upline, commissions are assigned to this upline. Broker does not own the book of business.
- **Dual Assignment** - Broker has an upline, commissions are assigned to this upline.
- **Principal - Selling** - Selling Principal of an Agency

## Rep Type Description

Your Rep Type should align with your primary selling mode.

- **Agency** - contracted at a higher level to support a downline structure.
- **Field Broker** - Primarily selling locally at in person appointments
- **Telesales Broker** - Primarily selling over the phone as part of a call center structure

# Onboarding: AHIP Prompt

AHIP is not required to move forward in the onboarding process; however, it is required to become Ready-to-Sell. This prompt only appears during this step, so we strongly recommend transmitting your AHIP results prior to continuing.

Please confirm you have the following information available: SSN, upline information, and payee/W-9 information, if applicable.

**EVOLVENXT** My Certification Cases

**Initial Case**

Zing Health requires agents to complete the annual Medicare Compliance + Fraud, Waste, and Abuse training and share the results with us. To have your AHIP transmitted to us, you will need to use our link below.

<http://ahipmedicaretraining.com/clients/zinghealth>

Use this process if...

- You completed AHIP through a different carrier and you would like to transmit your results to us
- You still need to complete AHIP and you would like to receive the discounted rate of \$125

Confirm you are in the correct place by the location of our logos in the right-hand corner. For password and website issues, AHIP recommends you:

1. Clear your cache and cookies
2. Close your browser entirely
3. Reopen and try again

Contact AHIP for Technical Support **Phone:** 866.234.6909 **Email:** [Support@AHIPInsuranceEducation.org](mailto:Support@AHIPInsuranceEducation.org)

Link to transmit AHIP results to us

Scroll down to read all information and click **CONTINUE**

# Onboarding: Security Validation

For the security and protection of the data that was pulled from the National Insurance Producer Registry (NIPR), we require that you enter your Social Security Number/EIN (Taxpayer ID) to validate that you are the entity listed below:

**Before You Begin...**

For the security and protection of the data that was pulled from the National Insurance Producer Registry (NIPR), we require that you enter your Social Security Number/EIN (Taxpayer ID) to validate that you are the entity listed below:

NPN

First Name

Last Name

SSN

Do not include hyphens nor spaces

**VALIDATE**

Complete field to verify identify and select Validate

View may vary based on your representative type.

# Onboarding: Contact Info

Please note: selecting ABORT at any point through this process will close out your invitation and a new one will need to be created.

**EVOLVENXT** My Certification Cases

NAVIGATION

- MY CERTIFICATION CASES
- REQUIRED TRAINING 1

CONTACT INFO PAYMENT LICENSE INFO TRAINING SUBMIT

Fields marked with an asterisk (\*) are required.

**Personal Information**

First Name \*  
Middle Initial  
Last Name \*  
Job Title  
SSN \*  
NPN \*  
DOB \*  
Mobile Phone \*  
Business Phone \*  
Marketing Phone  
Email \*  
Secondary Email

**Primary Address Information**

Address 1 \*  
Address 2

Complete all fields to include those required.

Scroll to complete all information and proceed

View may vary based on your representative type.

# Onboarding: Payment

If you are not paid by Zing Health, this section will not be included.

**EVOLVENXT**

My Certification Cases

NAVIGATION

- MY CERTIFICATION CASES
- REQUIRED TRAINING

CONTACT INFO

**PAYMENT**

LICENSE INFO

TRAINING

SUBMIT

Fields marked with an asterisk (\*) are required.

**Payee**

You are eligible to declare a private company, that you legally represent or own, to be your payee. This means that any money earned is paid to the Tax ID of this company. It also means that the 1099 tax form issued to you will be in the name and Tax ID of this company. If you chose to declare a payee, you will be prompted to sign a W9 form for your declared company payee. If you chose to not declare a company as your payee, then you will be the payee on record. This means that the 1099 tax form issued to you will be in your name and SSN. You will be prompted to sign a W9 form with your information.

Do you want to declare a private company to be your payee? \*

**Banking Information**

Payment Method

ABORT

**CONTINUE**

If you own an agency and wish to have your commissions pay to that account, select YES here and complete additional tax questions.

Complete all fields to include those required and then proceed.

# Onboarding: License Info

Select the states you wish to sell. To support appointment cost management, we ask you only declare states where you have an active business need. You can update your declared states at any point.

**EVOLVENXT** My Certification Cases

NAVIGATION

- MY CERTIFICATION CASES
- REQUIRED TRAINING 1

CONTACT INFO PAYMENT **LICENSE INFO** TRAINING SUBMIT

**License Information**

The table below indicates all states where ZING sells products for each line of business. Please choose and declare your sales intent per line of business from the available state options.

**Active :** Our records show that you own a valid health license in this state.  
**Inactive :** Our records show that you own a health license but it is not currently active.  
**No License Found:** Our records show that you do not own any health license in this state.

☐ I acknowledge if I do not currently own a license in a state where I intend to sell for Zing, I may still declare sales intent. However, I will need to acquire a license from that state's department of insurance before reaching ready to sell status in that state and able to receive commissions. If I do not meet those requirements any enrollment will be considered a contaminated sale and commissions will be forfeited for the life of the policy.

**Zing Declared States**

|                                                                  |                                                                     |
|------------------------------------------------------------------|---------------------------------------------------------------------|
| <input type="checkbox"/> IL - Illinois - <b>Inactive License</b> | <input type="checkbox"/> MS - Mississippi - <b>No License Found</b> |
| <input type="checkbox"/> IN - Indiana - <b>No License Found</b>  | <input type="checkbox"/> OH - Ohio - <b>No License Found</b>        |
| <input type="checkbox"/> MI - Michigan - <b>No License Found</b> | <input type="checkbox"/> TN - Tennessee - <b>No License Found</b>   |

ABORT CONTINUE

Check box for acknowledgement

Update selling states as desired

Click to CONTINUE to proceed

View may vary based on your representative type.

# Onboarding: Assigned Training

Click to expand tasks

EVOLVENXT

My Certification Cases

NAVIGATION

- MY CERTIFICATION CASES
- REQUIRED TRAINING 1

CONTACT INFO PAYMENT LICENSE INFO **TRAINING** SUBMIT

Open Assigned Trainings

▼ NOT STARTED 2027 Zing Training

History

No training available

ABORT

# Onboarding: Assigned Training Start

Upon clicking "Start" you will be given an opportunity to study for the exam and download training materials.

EVOLVENXT

NAVIGATION

MY CERTIFICATION CASES

REQUIRED TRAINING 1

<

Click to begin training.

Required Training

2027 Zing Training

2027 Zing Training

START

LOCKED

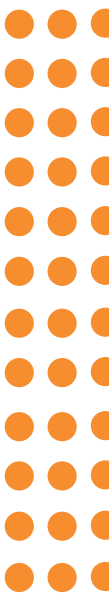
Zing Health 2026-2027 Product Certification

Zing Health 2026-2027 Product Exam

you must first complete the above training component(s) to unlock this component.

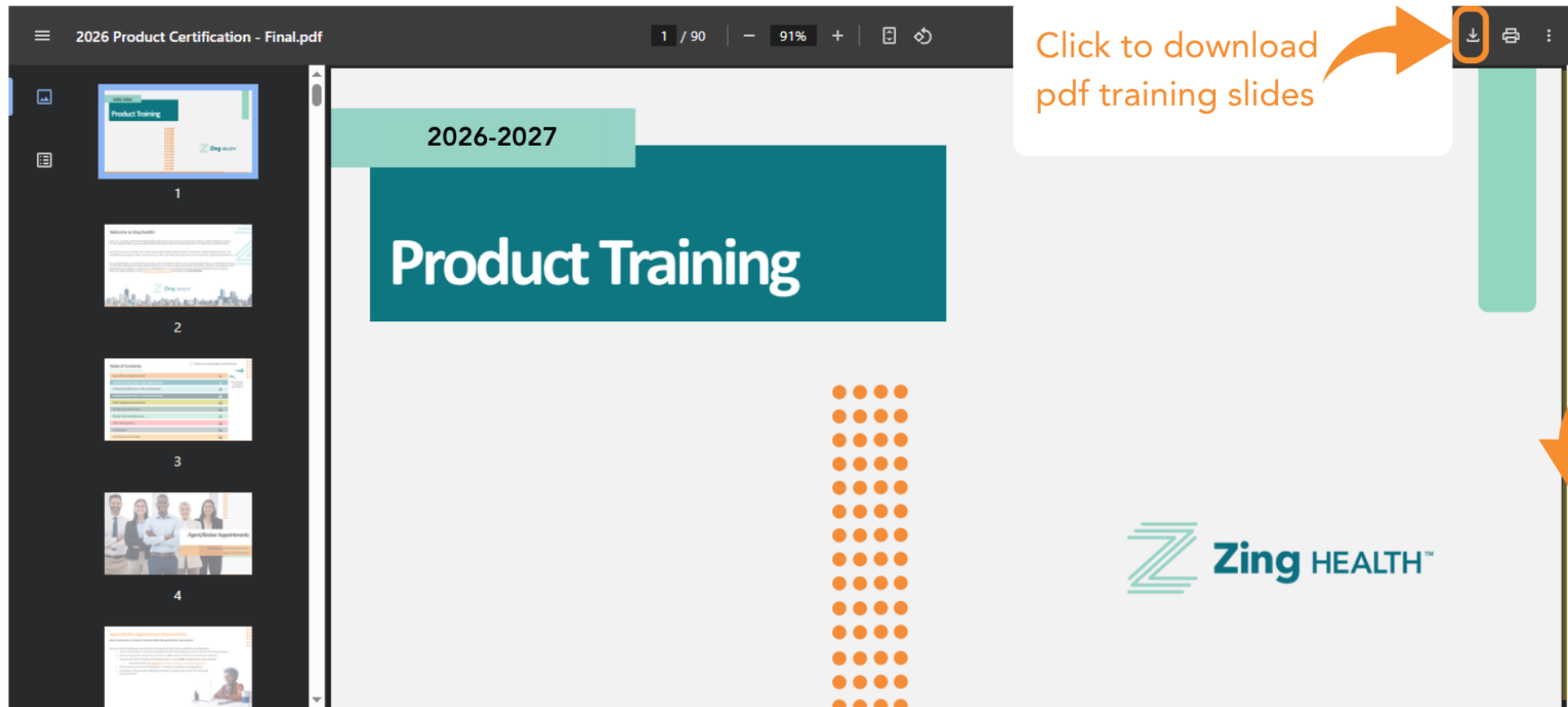
History

No training available



# Onboarding: Assigned Product Training

## Zing Health 2026-2027 Product Certification



Click to download  
pdf training slides



Once all  
material is  
viewed, click  
the X to close  
window



Scroll down to  
view training  
slides within the  
system

# Onboarding: Advance to Exam

Upon clicking "Start" your exam will begin and will count towards an attempt, whether you finish it or not.

***Please move forward only when you are ready.***

The screenshot displays the 'EVOLVENXT' interface for 'My Certification Cases'. The top navigation bar includes tabs for 'CONTACT INFO', 'PAYMENT', 'LICENSE INFO', 'TRAINING' (highlighted with an orange border), and 'SUBMIT'. A notification bell icon with a red '2' is visible in the top right corner.

Under the 'TRAINING' tab, the section 'en Assigned Trainings' lists two items:

- 2027 Zing Training**: This item is marked 'IN PROGRESS (50%)' and has an orange arrow pointing to it from a callout box labeled 'View progress'.
- 2026 Zing Training**: This section contains two sub-items:
  - Zing Health 2026-2027 Product Certification**: Marked 'COMPLETED'.
  - Zing Health 2026-2027 Product Exam**: Marked 'START' (highlighted with an orange border) and has an orange arrow pointing to it from a callout box labeled 'Advance to exam'. Below the 'START' button, a message reads: 'You must first complete the above training component(s) to unlock this component.'

At the bottom, a 'History' section shows 'No training available'.

# Onboarding: Product Exam

Exam consists of 25 questions. You must achieve a passing score of 85% or higher to successfully complete the training course. There are 3 attempts permitted. Be sure to answer all questions prior to selecting the Submit button.

## Zing Health 2026-2027 Product Exam

The Mastery Exam consists of 25 questions. You must achieve a passing score of 85% or higher to successfully complete this training course. There are 3 attempt(s) permitted. Be sure to answer all questions prior to selecting the **Submit** button.

Please note: you may only attempt this exam 3 more time(s).

Track attempts

1.

2.

3.



Should you need to exit at any point, click the X and your answers will be saved.



Scroll down to view and answer all 25 questions. Once sure of your answers click SUBMIT



# Onboarding: Exam Results - Passed

Zing Health 2026-2027 Product Exam

View exam results

Congratulations! You have passed the exam.

IMPORTANT! You MAY NOT market or sell Medicare products until you have satisfied all certification requirements. Please review your Dashboard to confirm your RTS status.

Below is a breakdown of all the questions you have answered. Please review the additional information provided for any questions answered incorrectly.

YOUR SCORE

100%

The required passing score is 85%

Click the X to close out. You will be able to review this again as needed.

Before exiting, scroll down to review the questions you answered incorrectly

# Onboarding: Exam Results - Failed

If you do not pass the exam on the first try, it is encouraged to review the questions you answered incorrectly and reference the training materials before proceeding.

The screenshot displays the 'Zing Health 2026-2027 Product Exam' results. At the top, a message states 'You did not pass the exam. You have 2 attempts remaining.' with a 'RETRY' button. Below this, a circular progress indicator shows '32%' completion, with a note that 'The required passing score is 85%'. A list of questions is visible below, with the first question partially shown. On the right side, there is a vertical yellow bar with a scroll handle and a close button (X) at the top.

**Zing Health 2026-2027 Product Exam**

View exam results and remaining attempts

You did not pass the exam. You have 2 attempts remaining.

RETRY

When ready to retake the exam, select **RETRY**

Below is a breakdown of all the questions you have answered. Please review the additional information provided for any questions answered incorrectly.

**YOUR SCORE**

32%

The required passing score is 85%

4.

Click the X to close out. You will be able to review this again as needed.

Before retaking exam, scroll down to review the questions you answered incorrectly

# Onboarding: Assigned Training Complete

If a certificate of completion is needed, please print screen. A downloadable certificate is not provided.

**EVOLVENXT**

NAVIGATION

- MY CERTIFICATION CASES
- REQUIRED TRAINING

My Certification Cases

CONTACT INFO PAYMENT LICENSE INFO **TRAINING** SUBMIT

Open Assigned Trainings

There are currently no required training courses assigned to you.

History

COMPLETED 2027 Zing Training

ABORT CONTINUE

View Results Again

Click to move forward

# Onboarding: Agreement

After the onboarding process is complete, you will be able to download both the agreement and your W-9. Critical fields in the contract will be automatically filled in.

The screenshot displays the EVOLVENXT user interface for the 'My Certification Cases' section. The sidebar on the left contains navigation links for 'NAVIGATION', 'MY CERTIFICATION CASES', and 'REQUIRED TRAINING'. The main content area shows a progress bar with five steps: 'CONTACT INFO', 'PAYMENT', 'LICENSE INFO', 'TRAINING', and 'SUBMIT'. The 'SUBMIT' button is highlighted with an orange border. Below the progress bar, a message states: 'Fields marked with an asterisk (\*) are required. Please click on the links below to review the documents and digitally sign as appropriate.' The 'Submit Onboarding' section features a document viewer displaying a 'ZING HEALTH INDEPENDENT BROKER AGREEMENT'. The document includes sections for 'RECITALS' and 'ARTICLE 1'. A yellow arrow points to the document viewer with the text 'Scroll to view all information and sign'.

View may vary based on your representative type.

# Onboarding: Agreement Signature Boxes

READ and  
CHECK all  
boxes.

- ☐ I have read and understand the contents of the filled W9 document. I confirm that the information is accurate. I consent to sign the W9 document electronically.
- ☐ I have read and agree to the terms and conditions of the contract.
- ☐ I understand that my submission of this application means that I have read and understand the contents of this application, and that I confirm that the information I have provided is accurate.
- ☐ I have read and understand the Zing Code of Conduct.
- ☐ I acknowledge that I have reviewed and fully understand the differences between Zing Health's plan offerings and how each plan type functions. Specifically, I understand: HMO Select Plans, PPO Open Choice Plans, PSP Elite Plans (Provider Specific Plans), and C-SNPs (Chronic Special Needs Plans). I confirm that I am confident in my ability to distinguish between these plan types and accurately explain them to Medicare beneficiaries.

Electronically sign  
with finger, stylus, or  
mouse



Please sign your name in the space below.

CLEAR

ABORT

SUBMIT



Click to  
SUBMIT



# Onboarding: Submission Successful

The screenshot displays the EVOLVENXT user interface for 'My Certification Cases'. The left sidebar contains the EVOLVENXT logo, a 'NAVIGATION' section with 'MY CERTIFICATION CASES' selected, and a 'REQUIRED TRAINING' section with a red indicator. The top navigation bar includes tabs for 'CONTACT INFO', 'PAYMENT', 'LICENSE INFO', 'TRAINING', and 'SUBMIT' (which is highlighted with an orange border). In the top right corner, there is a notification bell icon with a red '2' and a user profile icon. The main content area features a green 'Submission Successful!' message, a horizontal line, and the text 'Thank you for submitting your certification workflow.' Below this, there is a large, empty white box with a light gray border. A home icon is visible in the bottom right corner of the interface.

# Onboarding: Status

Once your onboarding case has been submitted, it will move through the background check and appointment review process for any states where an appointment is required.

This process typically takes 24 to 36 hours. If your case has not been approved after that timeframe, please contact Zing Health Broker Support.

NAVIGATION  
MY CERTIFICATION CASES

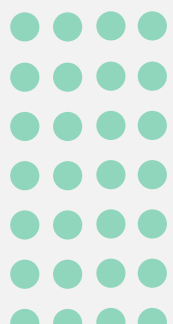
My Certification Cases

Search by Name: \_\_\_\_\_

| Name | LOB                | Year | Type    | NPN | Sales Level | Affiliated Agency/Team | Submitted By | Creation Date | Status                   |
|------|--------------------|------|---------|-----|-------------|------------------------|--------------|---------------|--------------------------|
|      | Medicare Advantage | 2026 | Initial |     | Agent - 01  |                        |              | 06/04/2025    | Pending Background Check |

FIRST PREVIOUS 1 NEXT LAST

Selecting My Certification Cases will allow you to view your status



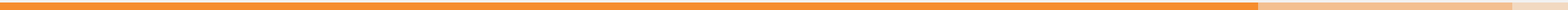
# Recertification

[Current Partner Invitation](#)

[AHIP Prompt](#)

[Assigned Product Training](#)

[Product Exam](#)



# Recertification: Current Partner

Once a recertification invitation has been generated, you will receive an email from [donotreply@evolvenxt.com](mailto:donotreply@evolvenxt.com)

Note: Recertification cases will expire December 31. If you are not RTS by that date, you will not be eligible to receive renewal commissions.

From: donotreply@evolvenxt.com  
Subject: Zing Health Recertification Invitation

Dear {broker name},

You are invited to recertify with Zing Health to market our Medicare Advantage plans.

To access your recertification, please log in using your existing EvolveNXT credentials by clicking the link below:

Recertification URL:

<https://zing.evolvenxt.com/login>.

Please note: This invitation will expire on December 31. If you are not ready-to-sell by that date, you will not be eligible to receive renewal commissions.

IMPORTANT: Before you can be marked as Ready to Sell (RTS), you must transmit your AHIP certification to Zing Health using the following link:

<http://ahipmedicaretraining.com/clients/zinghealth>

If you have trouble accessing the EvolveNXT portal, please use the Lost Password function.

For further assistance, contact us at [Brokers@myzinghealth.com](mailto:Brokers@myzinghealth.com) or call 844-946-4226 (Monday–Friday, 8 AM – 5 PM CT).

If you are unsure why you are receiving this email, please reach out to your Zing Health upline.

We look forward to your continued partnership!

Thank you,

Zing Health



# Recertification: Current Partner Process

Access your recertification by following the red prompts under My Credentials. If you are an Agency Principal, you will complete this step for your agency as well.

Before beginning, verify your Broker Type, Broker Sub Type and Upline are accurate. **If there are errors, do not proceed and contact Zing Health Broker Support for assistance.**

If all information is correct, select "START" to begin.

EVOLVENXT

Dashboard

Statements

Book of Business

App Status

Docs & Resources

My Credentials 1

My Certification Cases 1

My Status & Credentials

Manage My Licenses

My Account

Required Training

Workflows

My Certification Cases

Search by Names:

| LoB                | Type      | Status        | Email | NPN | Broker Type  | Broker Sub Type | Sales Level | Name | Upline Name | Creation Date | Email Send Date | Year | Submitted By |
|--------------------|-----------|---------------|-------|-----|--------------|-----------------|-------------|------|-------------|---------------|-----------------|------|--------------|
| Medicare Advantage | Recertify | Created - New |       |     | Field Broker | Downline Only   | Agent - 01  |      |             | 06/23/2026    | 06/23/2026      | 2027 |              |
| Medicare Advantage | Recertify | Approved      |       |     | Field Broker | Downline        | Agent -     |      |             |               |                 |      |              |
| Medicare Advantage | Recertify | Approved      |       |     | Field Broker |                 |             |      |             |               |                 |      |              |
| Medicare Advantage | Initial   | Approved      |       |     | Field Broker |                 |             |      |             |               |                 |      |              |

Showing 1 to 4 of

START

Sub Type Description

Your Sub Type dictates how your are paid. This should be confirmed annually with your upline.

- Downline Only - Broker has an upline, broker receives their own commissions.
- Licensed Only Agent - Broker has an upline, commissions are assigned to this upline. Broker does not own the book of business.
- Dual Assignment - Broker has an upline, commissions are assigned to this upline.
- Principal - Selling - Selling Principal of an Agency

Rep Type Description

Your Rep Type should align with your primary selling mode.

- Agency - contracted at a higher level to support a downline structure.
- Field Broker - Primarily selling locally at in person appointments
- Telesales Broker - Primarily selling over the phone as part of a call center structure

# Recertification: AHIP Prompt

AHIP is not required to move forward through the recertification process; however, it is required to become Ready-to-Sell. This prompt only appears during this step, so we strongly recommend transmitting your AHIP results prior to continuing.

The screenshot shows the EVOLVENXT interface with the title 'My Certification Cases'. A modal window titled 'Recertification' is displayed. It contains the following text: 'Zing Health requires agents to complete the annual Medicare Compliance + Fraud, Waste, and Abuse training and share the results with us. To have your AHIP transmitted to us, you will need to use our link below.' Below this is a highlighted link: <https://ahipmedicaretraining.com/clients/zinghealth>. An orange arrow points from the text 'Link to transmit AHIP results to us' to this link. The modal also lists 'Use this process if...' with two bullet points: '- You completed AHIP through a different carrier and you would like to transmit your results to us' and '- You still need to complete AHIP and you would like to receive the discounted rate of \$125'. It then says 'Confirm you are in the correct place by the location of our logos in the right-hand corner. For password and website issues, AHIP recommends you:' followed by a numbered list: '1. Clear your cache and cookies', '2. Close your browser entirely', and '3. Reopen and try again'. At the bottom, it provides contact information: 'Contact AHIP for Technical Support Phone: 866.234.6909 Email: Support@AHIPInsuranceEducation.org'. On the right side of the modal, there is a vertical scrollbar and an orange arrow pointing down with the text 'Scroll down to read all information and click CONTINUE'. The 'CONTINUE' button is visible at the bottom right of the modal.

# Recertification: Contact Info

EVOLVENXT

NAVIGATION

● MY CERTIFICATION CASES

REQUIRED TRAINING 1

<

My Certification Cases

CONTACT INFO

PAYMENT

LICENSE INFO

TRAINING

SUBMIT

Fields marked with an asterisk (\*) are required.

Personal Information

First Name \*

Middle Initial

Last Name \*

Job Title

SSN \*

NPN \*

DOB \*

Mobile Phone \*

Business Phone \*

Marketing Phone

Email \*

Secondary Email

Primary Address Information

Address 1 \*

10000 Commerce Dr

Address 2

Complete all fields to include those required.

Scroll to complete all information and proceed

# Recertification: Payment

**EVOLVENXT**

NAVIGATION

- MY CERTIFICATION CASES
- REQUIRED TRAINING

My Certification Cases

CONTACT INFO | **PAYMENT** | LICENSE INFO | TRAINING | SUBMIT

Fields marked with an asterisk (\*) are required.

**Payee**

You are eligible to declare a private company, that you legally represent or own, to be your payee. This means that any money earned is paid to the Tax ID of this company. It also means that the 1099 tax form issued to you will be in the name and Tax ID of this company. If you chose to declare a payee, you will be prompted to sign a W9 form for your declared company payee. If you chose to not declare a company as your payee, then you will be the payee on record. This means that the 1099 tax form issued to you will be in your name and SSN. You will be prompted to sign a W9 form with your information.

Do you want to declare a private company to be your payee? \*

**Banking Information**

Payment Method --

**CONTINUE**

If you own an agency and wish to have your commissions pay to that account, select YES here and complete additional tax questions.

Complete all fields to include those required and then proceed.

# Recertification: License Info

Verify the states you wish to sell in. To support appointment cost management, we ask you only declare states where you have an active business need. You can update your declared states at any point throughout the year.

**EVOLVENXT** My Certification Cases

NAVIGATION

- MY CERTIFICATION CASES
- REQUIRED TRAINING 1

CONTACT INFO PAYMENT **LICENSE INFO** TRAINING SUBMIT

**License Information**

The table below indicates all states where ZING sells products for each line of business. Please choose and declare your sales intent per line of business from the available state options.

**Active :** Our records show that you own a valid health license in this state.  
**Inactive :** Our records show that you own a health license but it is not currently active.  
**No License Found:** Our records show that you do not own any health license in this state.

☐ I acknowledge if I do not currently own a license in a state where I intend to sell for Zing, I may still declare sales intent. However, I will need to acquire a license from that state's department of insurance before reaching ready to sell status in that state and able to receive commissions. If I do not meet those requirements any enrollment will be considered a contaminated sale and commissions will be forfeited for the life of the policy.

**Zing Declared States**

|                                                                  |                                                                     |
|------------------------------------------------------------------|---------------------------------------------------------------------|
| <input type="checkbox"/> IL - Illinois - <b>Inactive License</b> | <input type="checkbox"/> MS - Mississippi - <b>No License Found</b> |
| <input type="checkbox"/> IN - Indiana - <b>No License Found</b>  | <input type="checkbox"/> OH - Ohio - <b>No License Found</b>        |
| <input type="checkbox"/> MI - Michigan - <b>No License Found</b> | <input type="checkbox"/> TN - Tennessee - <b>No License Found</b>   |

**CONTINUE**

Check box for acknowledgement

Update selling states as desired

Click to CONTINUE to proceed

# Recertification: Assigned Training Start

Upon clicking “Start” you will be given an opportunity to study for the exam and download training materials.

EVOLVENXT

Dashboard

Statements

Book of Business

App Status

My Documents

My Certifications

My Account

Required Training

Workflows

Required Training

Open Assigned Trainings

▼

Not Started

2027 Zing Training

2027 Zing Training

START

LOCKED

Zing Health 2026-2027 Product Certification

Zing Health 2026-2027 Product Exam

You must first complete the above training component(s) to unlock this component.

History

▼

Completed

2026 Zing Training

Click to begin training.

# Recertification: Assigned Product Training

Zing Health 2026-2027 Product Certification

2026 Product Certification - Final.pdf

1 / 90 | 91%

2026-2027

Product Training

Zing HEALTH™

Click to download pdf training slides

Once all material is viewed, click the X to close window

Scroll down to view training slides within the system

# Recertification: Advance to Exam

Upon clicking "Start" your exam will begin and will count towards an attempt, whether you finish it or not.

***Please move forward only when you are ready.***

The screenshot displays the 'My Certification Cases' page in the EVOLVENXT system. The page features a teal sidebar with the 'EVOLVENXT' logo and a navigation menu. The main content area has a header with 'My Certification Cases' and a notification bell icon. Below the header is a horizontal tab bar with five tabs: 'CONTACT INFO', 'PAYMENT', 'LICENSE INFO', 'TRAINING' (highlighted with an orange border), and 'SUBMIT'. The 'TRAINING' tab is active, showing a section titled 'en Assigned Trainings'. This section contains two training entries. The first entry, '2027 Zing Training', has a status of 'IN PROGRESS (50%)' and is highlighted with an orange box. An orange arrow points from a callout box labeled 'View progress' to this entry. The second entry, '2026 Zing Training', is expanded to show two sub-items: 'Zing Health 2026-2027 Product Certification' with a 'COMPLETED' status, and 'Zing Health 2026-2027 Product Exam' with a 'START' button. The 'START' button is highlighted with an orange box, and an orange arrow points from a callout box labeled 'Advance to exam' to it. Below the training entries is a 'History' section with a dropdown menu and a single entry for '2026 Zing Training' with a 'Completed' status.

EVOLVENXT

My Certification Cases

NAVIGATION

MY CERTIFICATION CASES

CONTACT INFO

PAYMENT

LICENSE INFO

TRAINING

SUBMIT

View progress

en Assigned Trainings

IN PROGRESS (50%) 2027 Zing Training

2026 Zing Training

COMPLETED

Zing Health 2026-2027 Product Certification

START

Zing Health 2026-2027 Product Exam

You must first complete the above training component(s) to unlock this component.

History

Completed 2026 Zing Training

# Recertification: Product Exam

Exam consists of 25 questions. You must achieve a passing score of 85% or higher to successfully complete the training course. There are 3 attempts permitted. Be sure to answer all questions prior to selecting the Submit button.

## Zing Health 2026-2027 Product Exam

The Mastery Exam consists of 25 questions. You must achieve a passing score of 85% or higher to successfully complete this training course. There are 3 attempt(s) permitted. Be sure to answer all questions prior to selecting the **Submit** button.

Please note: you may only attempt this exam 3 more time(s).

Track attempts

1.

2.

3.



Should you need to exit at any point, click the X and your answers will be saved.



Scroll down to view and answer all 25 questions. Once sure of your answers click SUBMIT

# Recertification: Exam Results - Passed

Zing Health 2026-2027 Product Exam

View exam results

Congratulations! You have passed the exam.

IMPORTANT! You MAY NOT market or sell Medicare products until you have satisfied all certification requirements. Please review your Dashboard to confirm your RTS status.

Below is a breakdown of all the questions you have answered. Please review the additional information provided for any questions answered incorrectly.

YOUR SCORE

100%

The required passing score is 85%

Click the X to close out. You will be able to review this again as needed.

Before exiting, scroll down to review the questions you answered incorrectly



# Recertification: Exam Results - Failed

If you do not pass the exam on the first try, it is encouraged to review the questions you answered incorrectly and reference the training materials before proceeding.

**Zing Health 2026-2027 Product Exam**

View exam results and remaining attempts

You did not pass the exam. You have 2 attempts remaining.

RETRY

When ready to retake the exam, select **RETRY**

Below is a breakdown of all the questions you have answered. Please review the additional information provided for any questions answered incorrectly.

**YOUR SCORE**

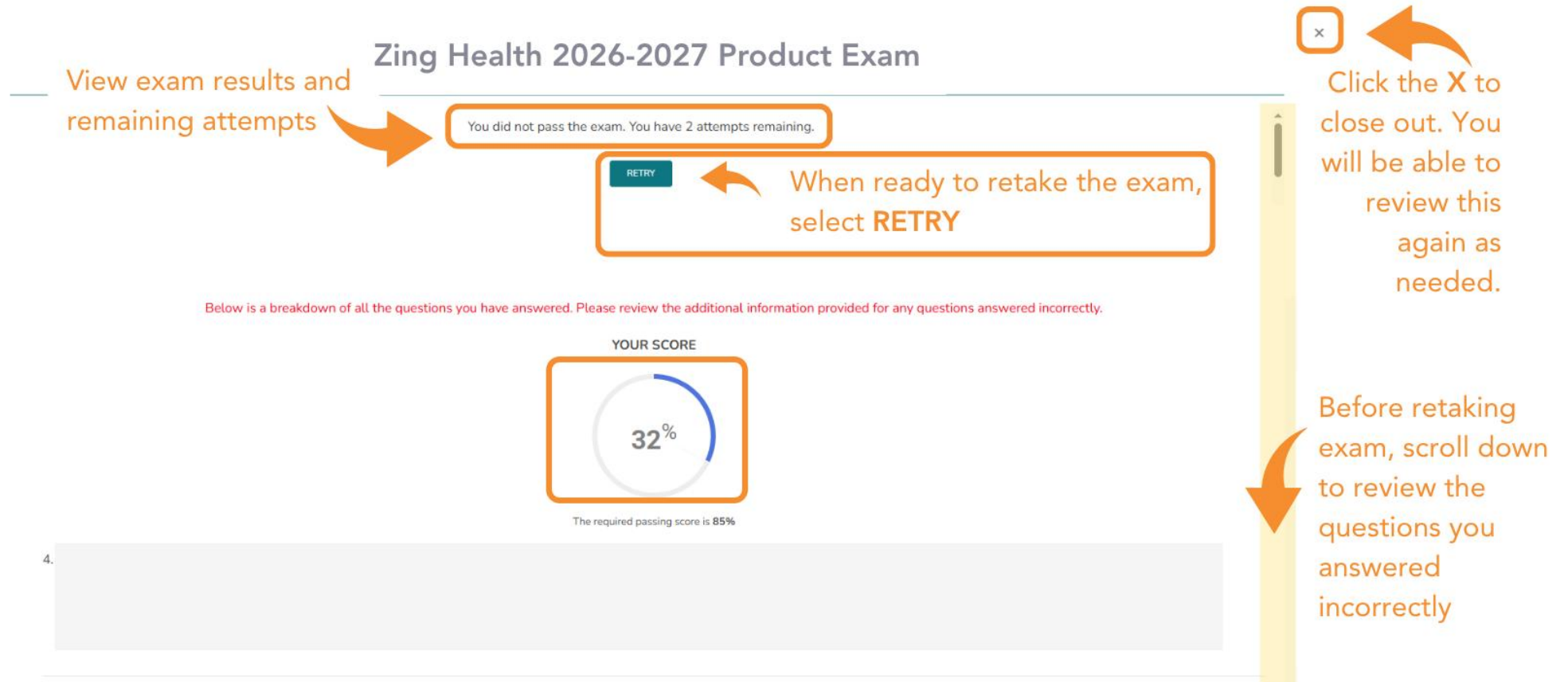
32%

The required passing score is 85%

4.

Click the X to close out. You will be able to review this again as needed.

Before retaking exam, scroll down to review the questions you answered incorrectly



# Recertification: Assigned Training Complete

If a certificate of completion is needed, please take a screenshot. A downloadable certificate is not provided.

**EVOLVENXT**

NAVIGATION

- MY CERTIFICATION CASES
- REQUIRED TRAINING

**My Certification Cases**

CONTACT INFO | PAYMENT | LICENSE INFO | **TRAINING** | SUBMIT

Open Assigned Trainings

There are currently no required training courses assigned to you.

History

✓ **COMPLETED** 2027 Zing Training

**CONTINUE**

View Results Again

Click to move forward

# Recertification: Agreement

After the recertification process is complete, you will be able to download both the agreement and your W-9. Critical fields in the contract will be automatically filled in.

Attention agency partners: If you have a separately executed redlined agreement, that agreement will control in the event of any conflict. Completing the agreement in the system is still required as part of the Ready-to-Sell process.

The screenshot displays the EVOLVENXT web application interface. On the left is a teal sidebar with the EVOLVENXT logo and navigation links: 'NAVIGATION', 'MY CERTIFICATION CASES', and 'REQUIRED TRAINING'. The main header area is titled 'My Certification Cases' and contains a progress bar with five steps: 'CONTACT INFO', 'PAYMENT', 'LICENSE INFO', 'TRAINING', and 'SUBMIT'. The 'SUBMIT' button is highlighted with an orange border. Below the progress bar, a message states: 'Fields marked with an asterisk (\*) are required. Please click on the links below to review the documents and digitally sign as appropriate.' The main content area is titled 'Submit Onboarding' and features a document viewer. The viewer shows a document titled 'obdoc\_download.htm' with a thumbnail on the left and the document content on the right. The document is a 'ZING HEALTH INDEPENDENT BROKER AGREEMENT'. The visible text includes the title, a paragraph about the agreement's purpose, and the beginning of the 'RECITALS' section. An orange arrow points from the text 'Scroll to view all information and sign' to the bottom of the document viewer, indicating that the user should scroll down to see the full document and the signing area.

EVOLVENXT

NAVIGATION

- MY CERTIFICATION CASES
- REQUIRED TRAINING

My Certification Cases

CONTACT INFO PAYMENT LICENSE INFO TRAINING SUBMIT

Fields marked with an asterisk (\*) are required.  
Please click on the links below to review the documents and digitally sign as appropriate

Submit Onboarding

obdoc\_download.htm 1 / 34 94%

DocuSign Envelope ID: E3CDEA33-856C-4D49-810A-DAAA6ED1C227

**Zing HEALTH**

**ZING HEALTH**  
**INDEPENDENT BROKER AGREEMENT**

This Independent Broker Agreement ("Agreement") is entered into by and between Zing Health of Michigan, Inc., on behalf of itself and its subsidiaries and affiliates (collectively, "Zing Health"), and \_\_\_\_\_ ("Agent"). This Agreement shall be effective as of \_\_\_\_\_ ("Effective Date"). Zing Health and Agent each may be referred to herein as a "Party" or collectively as the "Parties."

**RECITALS**

WHEREAS, Zing Health has a contract with Centers for Medicare and Medicaid Services (CMS) to offer Medicare Advantage Plans to Medicare beneficiaries;

WHEREAS, Zing Health seeks to engage Agent to provide certain marketing, sales and enrollment services in connection with Zing Health's Medicare Advantage Plans; and

WHEREAS, Agent seeks to provide such marketing, sales and enrollment services, as well as related administrative services, to and on behalf of Zing Health.

NOW, THEREFORE, in consideration of the mutual covenants herein contained, acknowledged to be good and sufficient consideration, the Parties do hereby agree as follows:

**ARTICLE 1**

Scroll to view all information and sign

# Recertification: Agreement

READ and  
CHECK all  
boxes.

- ☐ I have read and understand the contents of the filled W9 document. I confirm that the information is accurate. I consent to sign the W9 document electronically.
- ☐ I have read and agree to the terms and conditions of the contract.
- ☐ I understand that my submission of this application means that I have read and understand the contents of this application, and that I confirm that the information I have provided is accurate.
- ☐ I have read and understand the Zing Code of Conduct.
- ☐ I acknowledge that I have reviewed and fully understand the differences between Zing Health's plan offerings and how each plan type functions. Specifically, I understand: HMO Select Plans, PPO Open Choice Plans, PSP Elite Plans (Provider Specific Plans), and C-SNPs (Chronic Special Needs Plans). I confirm that I am confident in my ability to distinguish between these plan types and accurately explain them to Medicare beneficiaries.

Electronically sign  
with finger, stylus, or  
mouse



Please sign your name in the space below.

CLEAR

Click to  
SUBMIT



SUBMIT

# Recertification: Submission Successful

 EVOLVENXT

NAVIGATION

[MY CERTIFICATION CASES](#)

[REQUIRED TRAINING](#) 1

<

My Certification Cases

CONTACT INFO

PAYMENT

LICENSE INFO

TRAINING

SUBMIT

Submission Successful!

Thank you for submitting your certification workflow.

For the next step of your certification, you need to complete your training.

GO TO TRAINING

Once all certification requirements are met, you will become Active:Certified and will be ready to sell.

Broker Name

Email

NPN

39

# Broker Portal



[Dashboard](#)

[Ready to Sell Status](#)

[Commission Statements](#)

[Book of Business](#)

[Application Status](#)

[Docs & Resources](#)

[My Credentials](#)

[My Account](#)

[My Hierarchy Info](#)

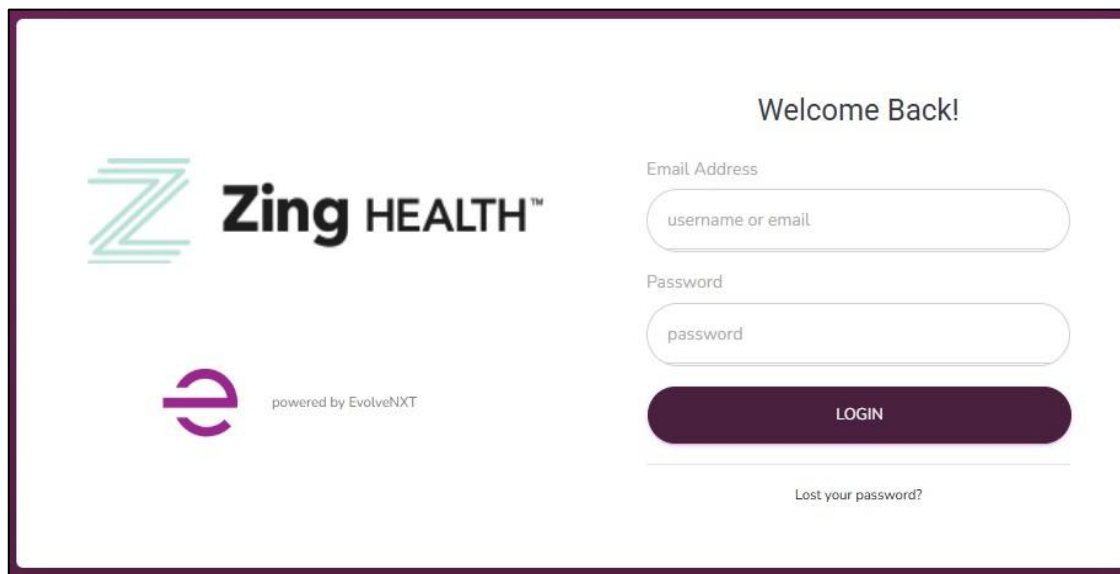
[Workflows](#)

[Agency Features](#)

# Broker Portal

Our broker portal manages a variety of activities and resources including but not limited to onboarding, certification, book of business tracking, commissions, licensing, and more.

The Zing Health Agent Portal can be found at: [ZING Login \(evolgenxt.com\)](https://evolgenxt.com).

A screenshot of the Zing Health login portal. The page has a white background with a dark purple border. On the left, there is a logo consisting of a stylized 'Z' made of three horizontal lines, followed by the text 'Zing HEALTH™'. Below this, there is a purple circular logo with a white 'e' inside, and the text 'powered by EvolveNXT'. On the right, the text 'Welcome Back!' is displayed. Below it, there are two input fields: 'Email Address' with a placeholder 'username or email' and 'Password' with a placeholder 'password'. A dark purple 'LOGIN' button is positioned below the password field. At the bottom right, there is a link that says 'Lost your password?'.

Welcome Back!

Email Address  
username or email

Password  
password

LOGIN

Lost your password?

# Broker Portal: Dashboard - Overview

When you log into the portal, you are directed straight to your dashboard. This is divided into three categories: Overview (default), Enrollments, and Statements.

**Overview** shows your Current Status with Zing, your AEP Sales Eligibility, access to Quick Links we've loaded for you, and your credentials.

EVOLVENXT

Dashboard

Statements

Book of Business

App Status

Docs & Resources

My Credentials

My Account

Required Training

Workflows

Dashboard

Overview

Enrollments

Statements

Current Status

Zing - Active/Certified

2027 AEP Sales Eligibility

2027 Recertification Approved

2027 Training Certificate Completed

Quick Links

Click **Quick Links** to expand and view links

Credentials

| Type     | Number of Active | Number of Expired | Status    |
|----------|------------------|-------------------|-----------|
| License  | 1                | 0                 | All Valid |
| Training | 2                | 1                 | All Valid |

# Broker Portal: Dashboard - Ready to Sell (RTS) Status

There are three steps to becoming RTS with Zing Health.

1

## Complete Assigned Case

Initial onboarding or new year recertification

2

## Transmit AHIP to Zing

Medicare Certificate must show received in portal

3

## Complete Product Training

Zing Health 2027 product training

An agent is fully RTS only when all three items show complete in the broker portal.

# Broker Portal: Dashboard – RTS Status Recertification Pending

Use the broker portal dashboard as your quick status check before selling Zing Health plans.

### 2027 AEP Sales Eligibility

-  2027 Recertification Pending
-  2027 Training Certificate Completed
-  2027 Product Training Completed

 2027 Recertification Pending

## What to Check:

Open **My Certification Cases** and review your pending assignments. Pay close attention to the plan year for the completed assignment.

If you do not have a 2027 recertification case assigned, please email [brokers@myzinghealth.com](mailto:brokers@myzinghealth.com).

1 Complete Assigned Case

2 Transmit AHIP to Zing

3 Complete Product Training

# Broker Portal: Dashboard – RTS Status Training Cert Pending

Use the broker portal dashboard as your quick status check before selling Zing Health plans.

**2027 AEP Sales Eligibility**

✓ 2027 Recertification Completed

! 2027 Training Certificate Pending

✓ 2027 Product Training Completed

! 2027 Training Certificate Pending

## What to Check:

Open **Training Info** found under **My Credentials > My Status & Credentials**. Once there, look for your 2027 Medicare Certificate. If you do not see it listed, you must transmit it to us.

Use this unique Zing link to transmit your AHIP:  
<http://ahipmedicaretraining.com/clients/zinghealth>

💡 Find this link on the dashboard under **Quick Links**

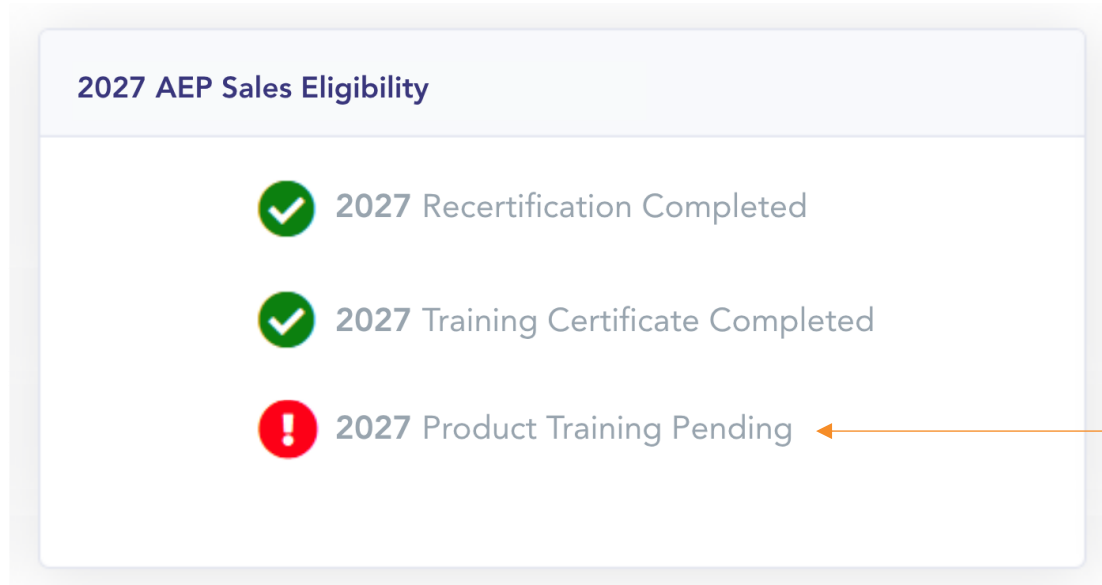
1 Complete Assigned Case

2 Transmit AHIP to Zing

3 Complete Product Training

# Broker Portal: Dashboard – RTS Status Product Training Pending

Use the broker portal dashboard as your quick status check before selling Zing Health plans.



2027 AEP Sales Eligibility

- ✓ 2027 Recertification Completed
- ✓ 2027 Training Certificate Completed
- ! 2027 Product Training Pending

! 2027 Product Training Pending

## What to Check:

Open **Required Training** and successfully complete the assigned training for the 2027 plan year.

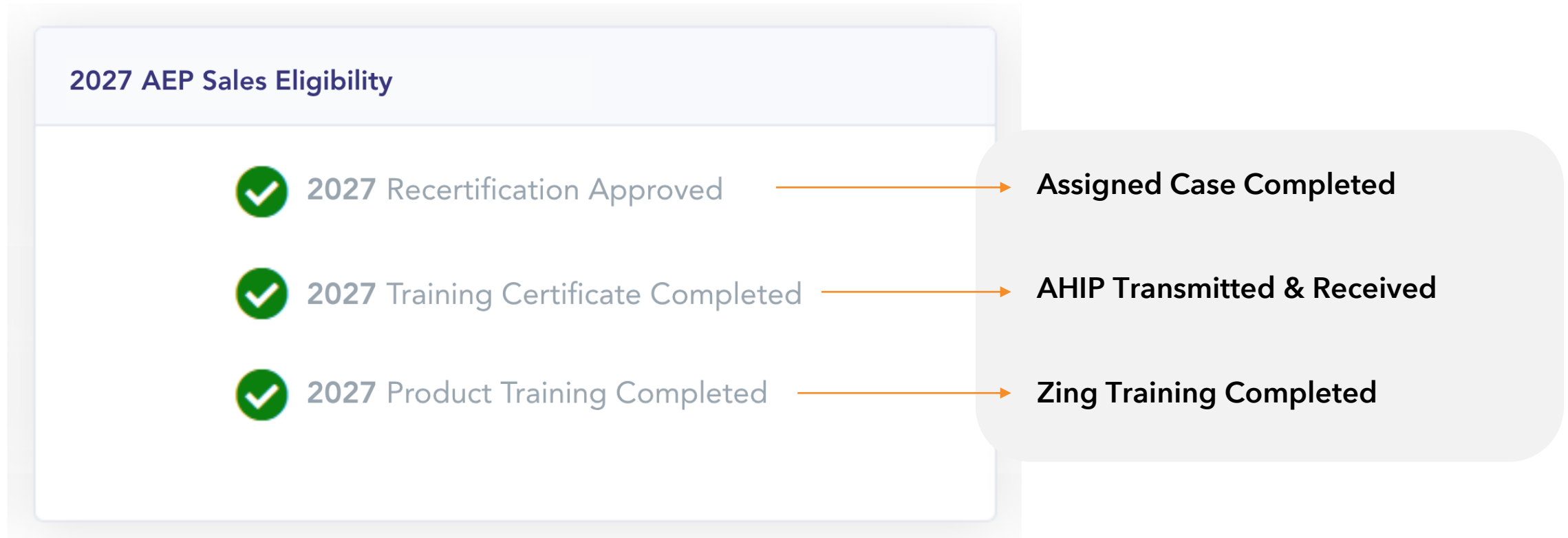
1 Complete Assigned Case

2 Transmit AHIP to Zing

3 Complete Product Training

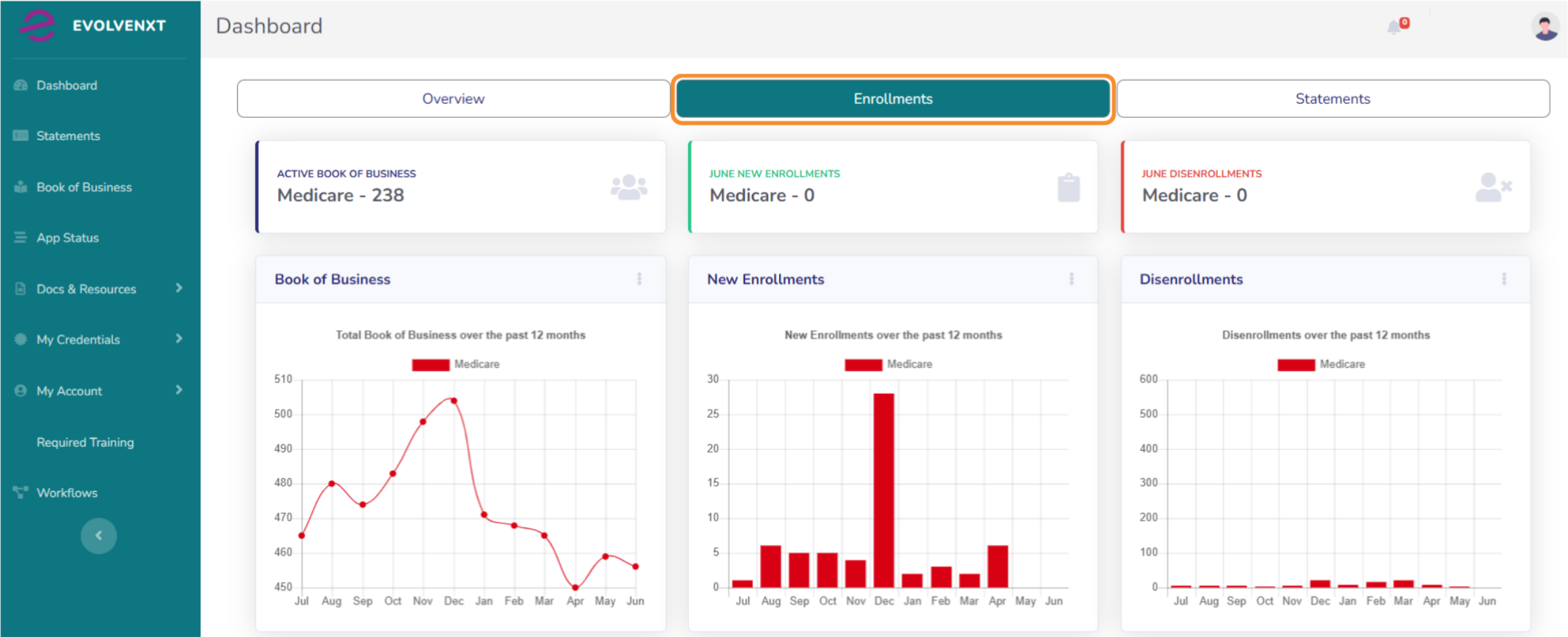
# Broker Portal: Dashboard – RTS Status Confirmation

Use the broker portal dashboard as your quick status check before selling Zing Health plans.



# Broker Portal: Dashboard - Enrollments

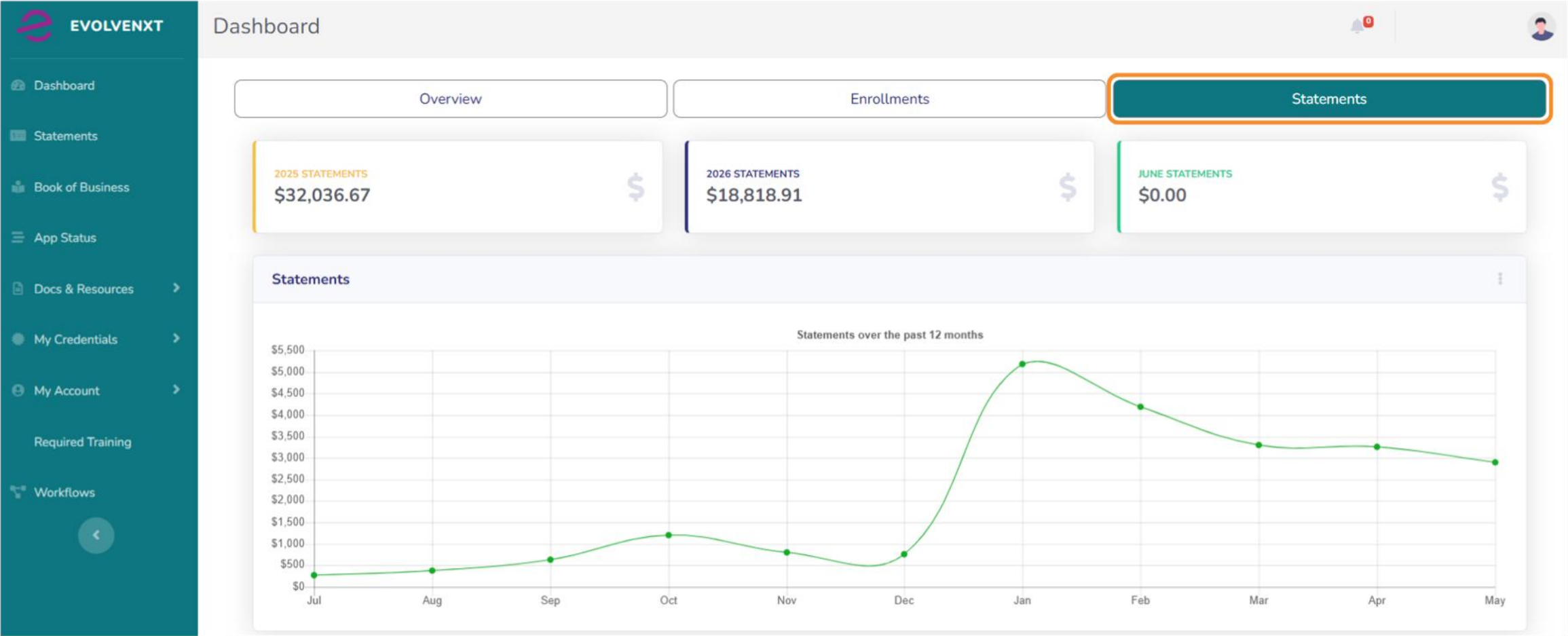
**Enrollments** is a summary view at your Active Book of Business, New Enrollments, and Disenrollments.



View may vary based on your representative type.

# Broker Portal: Dashboard - Statements

**Statements** is a summary view of your prior year statements, current year statements, and current month statements.



# Broker Portal: Commission Statements

If your commissions are paid to you by the health plan, you can view your commission statements. Once a statement is published, a new row with all details pertaining to that specific payment will be displayed. The Statement Date (Stmt. Date) corresponds with the payment date.

EVOLVENXT

Dashboard

Statements

Book of Business

App Status

My Certification Cases

Account Info

Statements

Statement From \*

Statement To \*

SEARCH

Show 10 entries

|           | Stmt # | Description    | Stmt Date  | Payee | Credits    | Debits    | Balance | Amount     | Pmt Date | Pmt Type |
|-----------|--------|----------------|------------|-------|------------|-----------|---------|------------|----------|----------|
| Excel PDF | 23171  | HRA 062725     | 06/27/2025 |       | \$250.00   | -\$100.00 | \$0.00  | \$150.00   |          | AP       |
| Excel PDF | 20491  | HRA 04252024   | 04/25/2025 |       | \$1,000.00 | -\$100.00 | \$0.00  | \$900.00   |          | AP       |
| Excel PDF | 18074  | HRA 032825     | 03/28/2025 |       | \$1,400.00 | -\$200.00 | \$0.00  | \$1,200.00 |          | AP       |
| Excel PDF | 15159  | HRA 02/28/2025 | 02/28/2025 |       | \$350.00   | -\$150.00 | \$0.00  | \$200.00   |          | AP       |
| Excel     | 13596  | HRA 01/31/2025 | 01/31/2025 |       | \$2,525.00 | \$0.00    | \$0.00  | \$2,525.00 |          | AP       |

Showing 1 to 10 of 27 entries

Previous

1

2

3

Next

# Broker Portal: Book of Business

The **Book of Business** tab will display all members where you are the Agent of Record. Enter one of the filters below to look for a specific member or search for members by category.

Once the search criteria are entered, select **Search** to generate results. Select **Download** at any time to export your Book of Business into Excel.

Member ID Cards are available to download by clicking on the **ID Card** icon next to member name.

EVOLVENXT

Dashboard

Statements

Book of Business

App Status

Docs & Resources

My Credentials

My Account

Required Training

Workflows

Book of Business

Member ID

First Name

Last Name

Member MBI

Active Member

Rep ID

Effective From

Effective To

Termination From

Termination To

SEARCH

DOWNLOAD

Last Data Load - 06/04/2026 4:47 AM

Search:

Show 10 entries

| ID Card | Member ID | MBI | First Name | Last Name | Phone | Effective Date | Termination Date | Contract | Plan | Mem Year |
|---------|-----------|-----|------------|-----------|-------|----------------|------------------|----------|------|----------|
|         |           |     |            |           |       | 01/01/2026     |                  | H4624    | 028  | 4        |
|         |           |     |            |           |       | 01/01/2026     |                  | H4624    | 028  | 2        |
|         |           |     |            |           |       | 01/01/2026     |                  | H4624    | 028  | 2        |
|         |           |     |            |           |       | 01/01/2026     |                  | H4624    | 028  | 3        |
|         |           |     |            |           |       | 01/01/2026     |                  | H4624    | 028  | 3        |
|         |           |     |            |           |       | 01/01/2026     |                  | H4624    | 028  | 3        |
|         |           |     |            |           |       | 04/01/2024     | 05/31/2024       | H4624    | 028  | 3        |
|         |           |     |            |           |       | 01/01/2026     |                  | H4624    | 028  | 3        |

Showing 1 to 10 of 123 entries

Previous

1

2

3

4

5

...

13

Next

# Broker Portal: Application Status

The **App Status** tab will display all your submitted applications. Enter one of the filters below to look for a specific member or search for members by category. Once the search criteria are entered, select **Search** to generate results. Select **Download** at any time to export your applications submitted into Excel.

The **Status** column is a very useful resource as you track the application through the enrollment process, especially for your C-SNP applications and the required verification.

Click the **i** to view the status code and status description.

 EVOLVENXT

Dashboard

Statements

Book of Business

App Status

Docs & Resources

My Credentials

My Account

Required Training

Workflows

App Status

Application ID

MBI

Application From

Application To

First Name

Last Name

Status

Broker ID

SEARCH

DOWNLOAD

| Application ID | MBI | Application Date | First Name | Last Name | Status <b>i</b>                                   | Broker ID |
|----------------|-----|------------------|------------|-----------|---------------------------------------------------|-----------|
|                |     | 02/11/26         |            |           | Application Completed - CSNP Verification Pending |           |
|                |     | 03/30/26         |            |           | Application Completed - CSNP Verification Pending |           |
|                |     | 04/22/26         |            |           | Application Completed - CSNP Verified             |           |
|                |     | 02/16/26         |            |           | Application Completed - CSNP Verified             |           |
|                |     | 01/02/26         |            |           | Application Completed - CSNP Verified             |           |
|                |     | 05/21/26         |            |           | Application Completed - CSNP Verification Pending |           |
|                |     | 04/29/26         |            |           | Application Completed - CSNP Verified             |           |
|                |     | 03/10/26         |            |           | Application Completed - CSNP Verified             |           |
|                |     | 03/20/26         |            |           | Application Completed - CSNP Verified             |           |
|                |     | 03/20/26         |            |           | Application Completed - CSNP Verified             |           |

# Broker Portal: Docs & Resources

The **Docs & Resources** section allows you to view shared resources that the health plan has loaded along with executed agreements.

**Shared Resources** is where you will find information like the annual comp addendum, certification guides, and commission pay schedules.

**My Documents** stores your executed contract agreements, signed W-9s and additional documents that may have been shared with us.

EVOLVENXT

Dashboard

Statements

Book of Business

App Status

Docs & Resources

Shared Resources

My Documents

My Credentials

My Account

Required Training

Workflows

Shared Resources

Search Resource Category

Select All

Must Acknowledge

Select All

Search:

|                                         | Description                                     | Type            |
|-----------------------------------------|-------------------------------------------------|-----------------|
| <div>DOWNLOAD</div> <div>VIEW PDF</div> | 2026 Broker Certification Guide                 | Resource Guides |
| <div>DOWNLOAD</div> <div>VIEW PDF</div> | 2026 Agent Comp Addendum                        | Comp Addendum   |
| <div>DOWNLOAD</div> <div>VIEW PDF</div> | 2026 Zing Health Broker Commission Pay Schedule | Comp Addendum   |

EVOLVENXT

Dashboard

Statements

Book of Business

App Status

Docs & Resources

My Documents

My Credentials

My Account

Required Training

Workflows

My Documents

Search Document Category

SELECT ALL

Search:

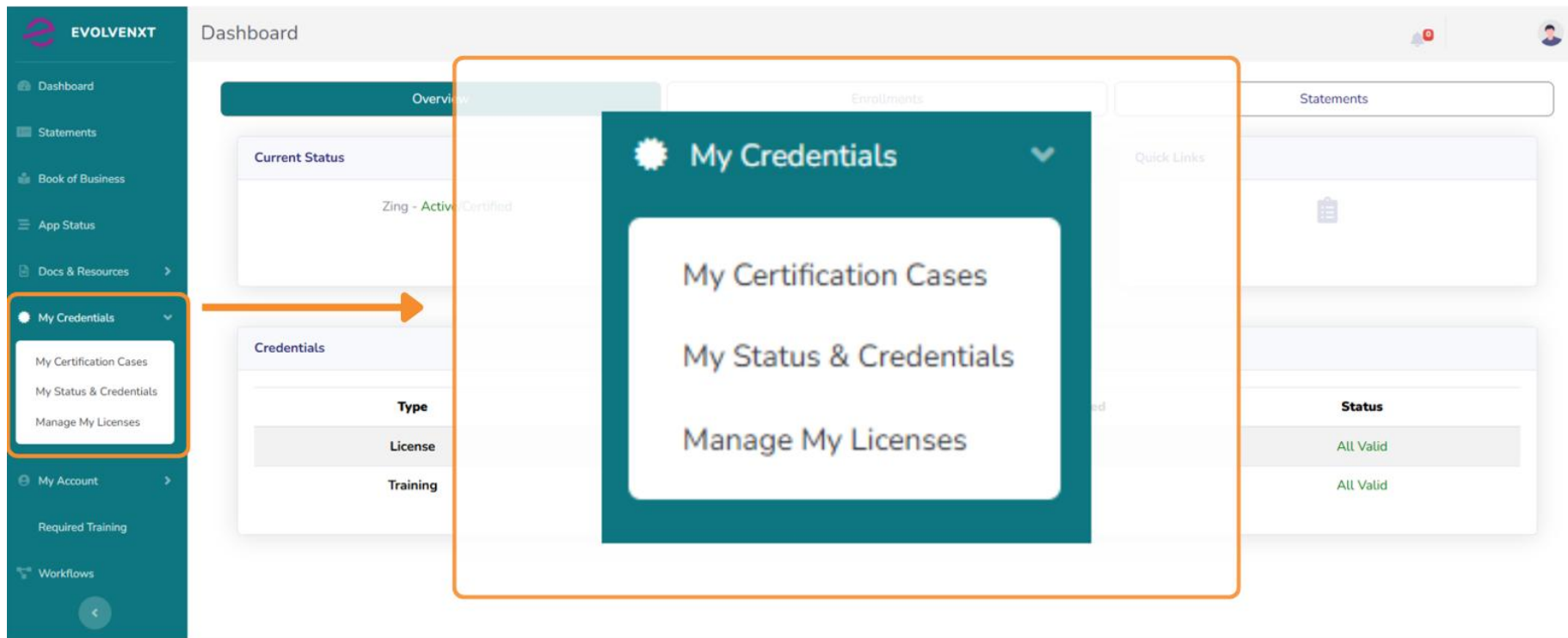
|                                         | Description        | Doc Type     |
|-----------------------------------------|--------------------|--------------|
| <div>DOWNLOAD</div> <div>VIEW PDF</div> | Signed MA Contract | Contract     |
| <div>DOWNLOAD</div> <div>VIEW PDF</div> | Signed MA Contract | Contract     |
| <div>DOWNLOAD</div> <div>VIEW PDF</div> | W9 - Signed        | W9           |
| <div>DOWNLOAD</div> <div>VIEW PDF</div> | Direct Release     | others -test |

Showing 1 to 4 of 4 entries

# Broker Portal: My Credentials

Under **My Credentials**, you have three different sections: My Certification Cases, My Status & Credentials, Manage My Licenses.

Each section houses very important information you will need access to during your partnership with the health plan.



# Broker Portal: My Credentials – Certification Cases

The **Certification Cases** page allows agents to review current and historical certification cases, including the status of each assigned case.

Completion of the annual certification or recertification case is required as part of the ready-to-sell process.

EVOLVENXT

Dashboard

Statements

Book of Business

App Status

Docs & Resources

My Credentials1

My Certification Cases1

My Status & Credentials

Manage My Licenses

My Account

Required Training

Workflows

My Certification Cases

Search by Names:

|       | LoB                | Type      | Status        | Email | NPN | Broker Type  | Broker Sub Type | Sales Level | Name | Upline Name | Creation Date | Email Send Date | Year | Submitted By |
|-------|--------------------|-----------|---------------|-------|-----|--------------|-----------------|-------------|------|-------------|---------------|-----------------|------|--------------|
| START | Medicare Advantage | Recertify | Created - New |       |     | Field Broker | Downline Only   | Agent - 01  |      |             | 06/23/2026    | 06/23/2026      | 2027 |              |
|       | Medicare Advantage | Recertify | Approved      |       |     | Field Broker | Downline Only   | Agent - 01  |      |             | 06/26/2025    | 06/26/2025      | 2026 |              |
|       | Medicare Advantage | Recertify | Approved      |       |     | Field Broker | Downline Only   | Agent - 01  |      |             | 06/25/2024    | 06/25/2024      | 2025 |              |
|       | Medicare Advantage | Initial   | Approved      |       |     | Field Broker | Downline Only   | Agent - 01  |      |             | 06/27/2023    | 06/27/2023      | 2024 |              |

Showing 1 to 4 of 4 entries

First

Previous

1

Next

Last

# Broker Portal: My Credentials – My Status & Credentials

The **My Status & Credentials** page is divided into several sections that help agents review their current status with Zing Health. This includes certification status, sales states and licenses, training history, contract information, and state appointment details.

**EVOLVENXT**

My Status & Credentials

**My Status Info**

Under **My Status Info**, view your current status with Zing Health.

- **Active/Certified**
- **Suspended - Pending Training**
- **Suspended - Pending License**
- **Suspended - Pending Principal (agencies only)**

**Sales States & Licenses**

Under **Sales States & Licenses**, you will find a table that lists the Line of Business and states where you have declared sales intent, as well as your license status in each of those states.

**Training Info**

Under **Training Info**, you can easily view all trainings on file for you, including your AHIP.

💡 If you are Suspended-Pending Training, looking here can help identify which training is missing. Both Zing Training and Medicare Certificate must be received each plan year.

**Contract Info**

Under **Contract Info**, view all plan years you've contacted with Zing Health.

**Appointment Info**

Under **Appointment Info**, view all declared states and your appointment status in each.

# Broker Portal: My Credentials – Manage My Licenses

The **Manage My Licenses** page is used to update declared selling states. To support appointment cost management, agents should only declare states where they are licensed or have an active business need.

EVOLVENXT

Dashboard

Statements

Book of Business

App Status

Docs & Resources

My Credentials

My Certification Cases

My Status & Credentials

Manage My Licenses

My Account

Required Training

Workflows

Manage My Licenses

The table below indicates all states where ZING sells products for each line of business. Please choose and declare your sales intent per line of business from the available state options.

Active : Our records show that you own a valid health license in this state.

Inactive : Our records show that you own a health license but it is not currently active.

No License Found: Our records show that you do not own any health license in this state.

If you do not currently own a license in a state where you intend to sell for ZING, you may still declare sales intent. However, you will need to acquire a license from that state's department of insurance before reaching ready to sell status in that state.

Zing Declared States

☒ IL - Illinois - Active License

☒ IN - Indiana - Inactive License

☒ MI - Michigan - Active License

☐ MS - Mississippi - No License Found

☐ OH - Ohio - Active License

☒ TN - Tennessee - No License Found

ADD SELECTED STATES

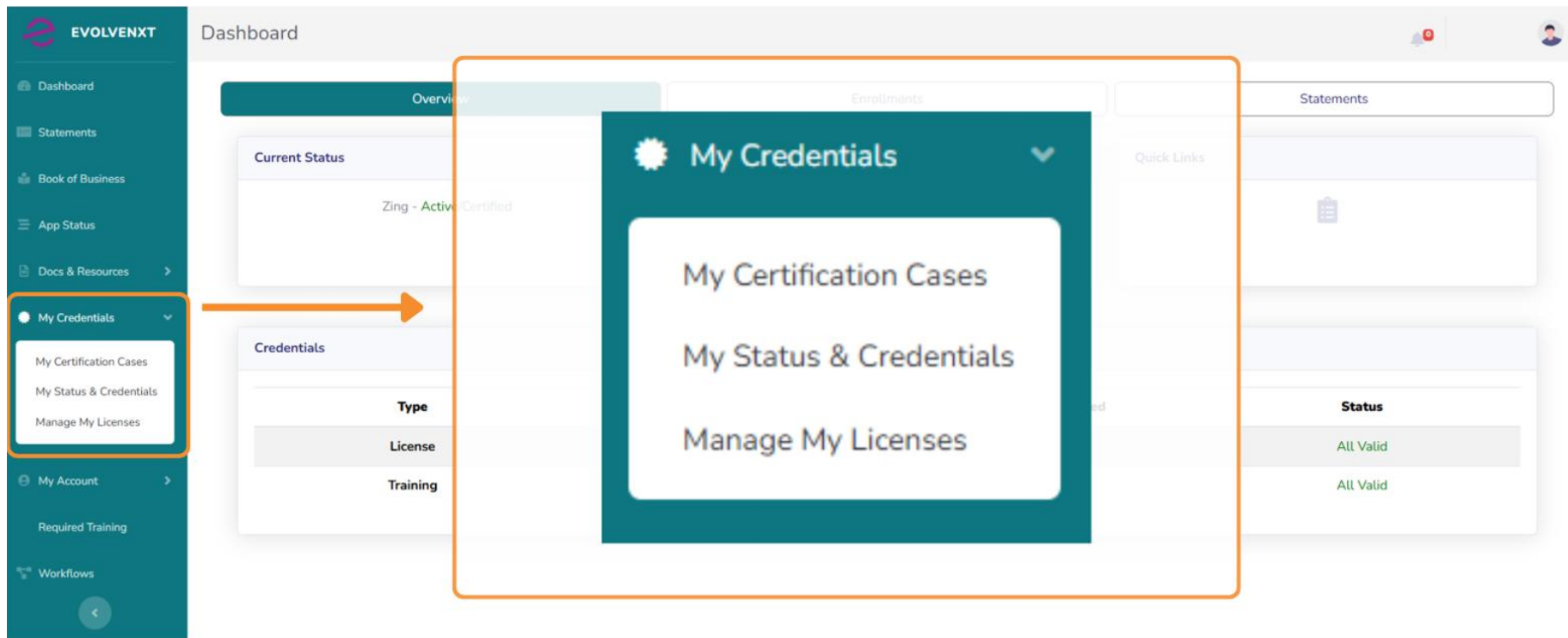
View may vary based on your representative type.

57

# Broker Portal: My Account

Under **My Account**, you have three different sections: Account Info, Payee Info, and My Hierarchy Info.

Each section houses very important information you will need access to during your partnership with the health plan.



# Broker Portal: My Account – Account Info

The **Account Info** page allows agents to update their contact information, including phone numbers, email address, and business, home, or shipping addresses. Agents should ensure their email and mobile phone number are accurate and regularly monitored, as Zing Health may use this information for important health plan communications, technology updates, and marketing-related messages.

EVOLVENXT

Dashboard

Statements

Book of Business

App Status

Docs & Resources

My Credentials

My Account

Account Info

Payee Info

My Hierarchy Info

Required Training

Workflows

Account Info

EDIT ACCOUNT INFO

Personal Information

First Name

Last Name

User Phone

Business Phone

Mobile Phone

For Dual Authentication and SMS

Marketing Phone

Email

Note: This email is used for receiving notification emails from ZING. Updating this email will not affect your portal login credentials.

Address Information

Address Type

Address

City

State

Zip

# Broker Portal: My Account – Payee Info

The **Payee Info** page displays the name, address, tax, and banking information Zing Health has on file for payment and 1099 reporting. Agents can use Edit Payee Info to update their name or address, but any changes will require completion of a new W-9 before the updates can be saved.

For Dual Assignment or Licensed Only agents, adding payee information in the portal will not update the current payment setup. These agents should work directly with their upline if banking or payment changes are needed.

EVOLVENXT

Dashboard

Statements

Book of Business

App Status

Docs & Resources

My Credentials

My Account

Account Info

Payee Info

My Hierarchy Info

Required Training

Workflows

Payee Info

EDIT PAYEE INFO

Note: Your payee address will be used for shipping documents such as the 1099 form and paper checks (where applicable).

Name

Address

City

State

Zip

SSN / TIN

Fed Tax Class

Individual/Sole Proprietor

Other Tax Code

☒ Hide Information

EDIT BANKING INFO

Banking Method

ACH

Account Number

Verify Account Number

Routing Number

Financial Institution

Account Type

CHECKING

☒ Hide Information

View may vary based on your representative type.

60

# Broker Portal: My Account – My Hierarchy Info

The **My Hierarchy Info** page allows agents to view their current and historical upline relationships with the health plan. This page also displays the agent’s Sub Type and Rep Type, which help identify how the agent is aligned for payment and their primary selling model.

Agents should review this information annually and contact their upline or the health plan if anything appears incorrect.

EVOLVENXT

Dashboard

Statements

Book of Business

App Status

Docs & Resources

My Credentials

My Account

Account Info

Payee Info

My Hierarchy Info

Required Training

Workflows

My Hierarchy Info

Rep

NPN

Start Date

End Date

Sales Level

Upline Name

Assigned Comp Name

Sub Type

Rep Type

CHANGE

10/01/2025

01 - Agent

Downline Only

Field Broker

02/15/2022

09/30/2025

01 - Agent

Downline Only

Field Broker

Sub Type Description

Your Sub Type dictates how your are paid. This should be confirmed annually with your upline.

• Downline Only - Broker has an upline, broker receives their own commissions.

• Licensed Only Agent - Broker has an upline, commissions are assigned to this upline. Broker does not own the book of business.

• Dual Assignment - Broker has an upline, commissions are assigned to this upline.

• Principal - Selling - Selling Principal of an Agency

Rep Type Description

Your Rep Type should align with your primary selling mode.

• Agency - contracted at a higher level to support a downline structure.

• Field Broker - Primarily selling locally at in person appointments

• Telesales Broker - Primarily selling over the phone as part of a call center structure

View may vary based on your representative type.

61

# Broker Portal: My Account – My Hierarchy Info | Change Request

If an agent needs to request a change to their upline affiliation or their Sub Type, they can begin the process from the **My Hierarchy Info** page by selecting **Change**. All change requests are subject to Zing Health’s release and intent-to-change policies, and additional documentation or approval may be required before the request can be finalized.

EVOLVENXT

Dashboard

Statements

Book of Business

App Status

Docs & Resources

My Credentials

My Account

Account Info

Payee Info

My Hierarchy Info

Required Training

Workflows

My Hierarchy Info

| Rep    | NPN | Start Date | End Date   | Sales Level | Upline Name | Assigned Comp Name | Sub Type      | Rep Type     |
|--------|-----|------------|------------|-------------|-------------|--------------------|---------------|--------------|
| CHANGE |     | 10/01/2025 |            | 01 - Agent  |             |                    | Downline Only | Field Broker |
|        |     | 02/15/2022 | 09/30/2025 | 01 - Agent  |             |                    | Downline Only | Field Broker |

# Broker Portal: My Account – My Hierarchy Info | Change Request, Cont.

After selecting **Change** from the **My Hierarchy Info** page, a pop-up will appear where agents must choose one of two options: **Request Hierarchy Change** or **Request Payment Change with My Current Upline**. Agents should select the option that best reflects the type of change they are requesting.

**Hierarchy Change**  
should be used when requesting a change to upline affiliation.

**Payment Change**  
should be used when the agent’s upline remains the same, but the payment arrangement needs to be updated.

EVOLVENXT

Dashboard

Statements

Book of Business

App Status

Docs & Resources

My Credentials

My Account

Account Info

Payee Info

My Hierarchy Info

Required Training

Workflows

My Hierarchy Info

CHANGE

| Rep NPN | Rep Name | Rep Type     | Current Sub Type |
|---------|----------|--------------|------------------|
|         |          | Field Broker | Downline Only    |

| Current Next Upline Broker/Agency | Current Commission Assign | Start Date | End Date |
|-----------------------------------|---------------------------|------------|----------|
|                                   |                           | 10/01/2025 |          |

Producer Type and Hierarchy Management

Hierarchy Change Options

Request Hierarchy Change

Request Payment change with my current Upline

| Sub Type      | Rep Type     |
|---------------|--------------|
| Downline Only | Field Broker |
| Downline Only | Field Broker |

# Broker Portal: My Account – My Hierarchy Info | Hierarchy Change

To request a **Hierarchy Change**, agents must select the **Sub Type** they would like under the new upline, then search for the new upline by **Agency Name** or **Agency NPN**. Agents should also include any applicable comments, such as whether they have a release on file or are requesting to move without a release. Select **Update** once you are ready to submit the request.

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Dashboard

Statements

Book of Business

App Status

Docs & Resources

My Credentials

My Account

Account Info

Payee Info

My Hierarchy Info

Required Training

Workflows

My Hierarchy Info

CHANGE

| Rep NPN | Rep Name | Rep Type     | Current Sub Type |
|---------|----------|--------------|------------------|
|         |          | Field Broker | Downline Only    |

| Current Next Upline Broker/Agency | Current Commission Assign | Start Date | End Date |
|-----------------------------------|---------------------------|------------|----------|
|                                   |                           | 10/01/2025 |          |

Producer Type and Hierarchy Management

Hierarchy Change Options

Request Hierarchy Change

New Sub Type Options

Nothing selected

\*\*

Leave my upline and become Direct sub type

Join a new upline as Downline Only sub type

Join a new upline as Licensed Only Agent sub type

Join a new upline as Dual Assignment sub type

Next Upline

SEARCH

Add a comment to this workflow request:

UPDATE

| Sub Type      | Rep Type     |
|---------------|--------------|
| Downline Only | Field Broker |
| Downline Only | Field Broker |

Sub Type Description

- Downline Only - Broker has an upline, broker receives their own commissions.
- Licensed Only Agent - Broker has an upline, commissions are assigned to this upline. Broker does not own the book of business.
- Dual Assignment - Broker has an upline, commissions are assigned to this upline.
- Principal - Selling - Selling Principal of an Agency

View may vary based on your representative type.

64

# Broker Portal: My Account – My Hierarchy Info | Payment Change

To update a current **Sub Type** without changing upline affiliation, agents should select **Request Payment Change with My Current Upline**. From there, agents can choose the desired **Sub Type**, add any supporting comments for Zing Health to review, and select **Update** to submit the request.

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Dashboard

Statements

Book of Business

App Status

Docs & Resources

My Credentials

My Account

Account Info

Payee Info

My Hierarchy Info

Required Training

Workflows

My Hierarchy Info

CHANGE

| Rep NPN | Rep Name | Rep Type     | Current Sub Type |
|---------|----------|--------------|------------------|
|         |          | Field Broker | Downline Only    |

| Current Next Upline Broker/Agency | Current Commission Assign | Start Date | End Date |
|-----------------------------------|---------------------------|------------|----------|
|                                   |                           | 10/01/2025 |          |

Producer Type and Hierarchy Management

Hierarchy Change Options

Request Payment change with my current Upline

New Sub Type Options

Nothing selected

--

Licensed Only Agent

Dual Assignment

Add a comment to this workflow request:

UPDATE

Sub Type Description

Downline Only - Broker has an upline, broker receives their own commissions.

Licensed Only Agent - Broker has an upline, commissions are assigned to this upline. Broker does not own the book of business.

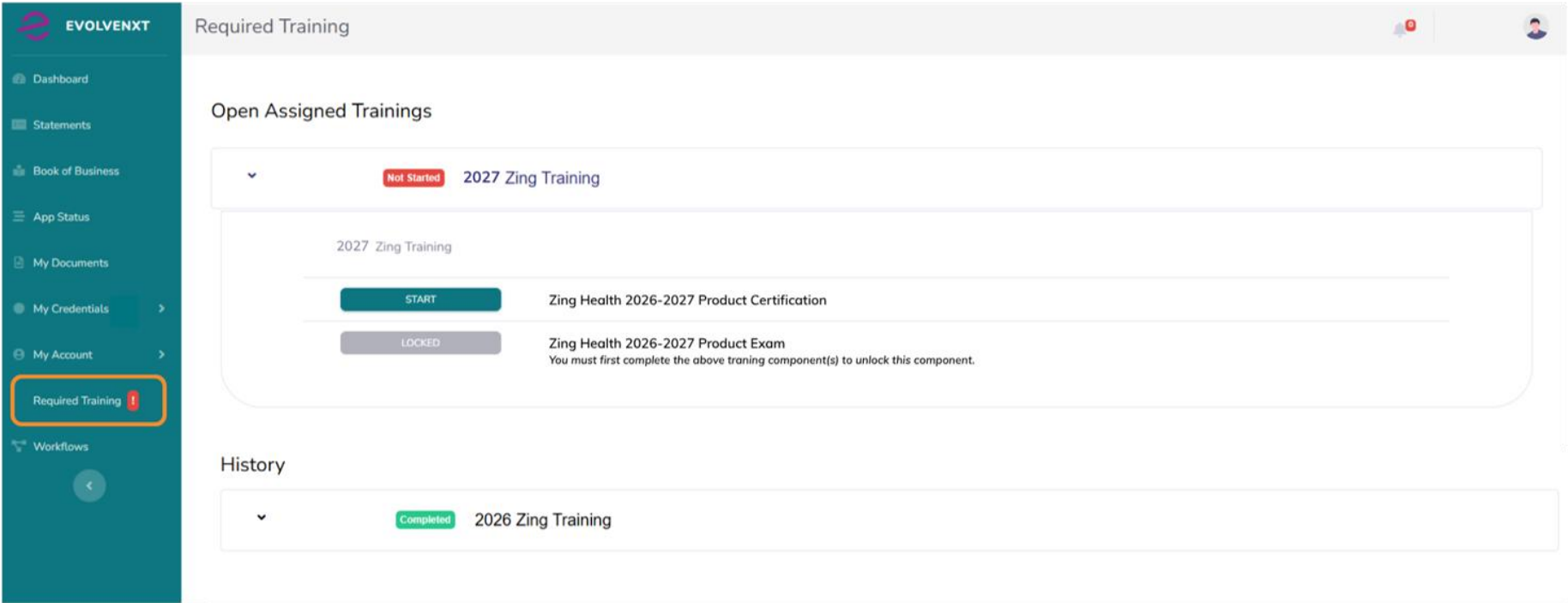
Dual Assignment - Broker has an upline, commissions are assigned to this upline.

Principal - Selling - Selling Principal of an Agency

# Broker Portal: Required Training

Agents can view open assigned trainings and completed training history under **the Required Training** section. In addition to annual product certification, Zing Health may assign additional required trainings for compliance-related concerns or for agency partners required to complete annual attestations.

If an agent has an open assigned training, a red notification will appear in the left-hand navigation menu to indicate action is required.



# Broker Portal: Workflows

The **Workflows** page allows agents to view and track requests or tasks assigned during their partnership with the health plan. Workflows are commonly used for hierarchy change requests, payment change requests, or other items that may require review, approval, or follow-up.

Agency partners and agents should monitor this section and complete any assigned workflows in a timely manner to avoid delays in processing.

EVOLVENXT

Dashboard

Statements

Book of Business

App Status

Docs & Resources

My Credentials

My Account

Required Training

Workflows

Workflows

Status

Type

SEARCH

DOWNLOAD

Show 10 entries

Search:

| Type                       | Status | Requestor | Approver | Execution Date | Last Updated |
|----------------------------|--------|-----------|----------|----------------|--------------|
| No data available in table |        |           |          |                |              |

Showing 0 to 0 of 0 entries

Previous

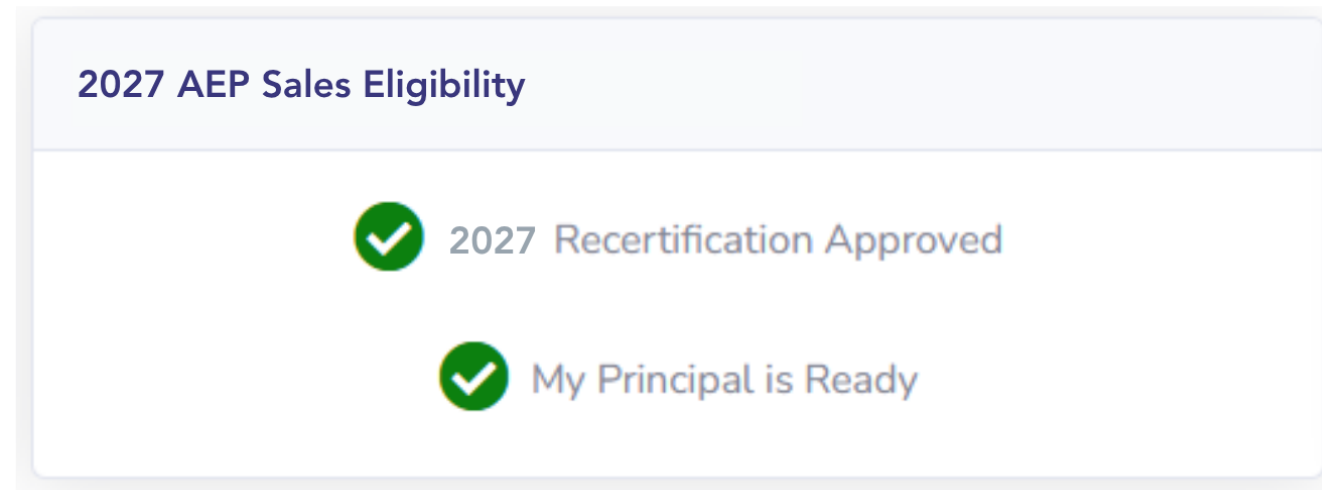
Next

# Broker Portal: Agency - RTS Status

For an agency to reflect Ready-to-Sell, the agency must complete its assigned certification case, and the Principal must complete all required individual steps. Delays may impact the RTS status of downline agents and may prevent payment of override commissions.

Please note: no exam is required for the agency certification case. This step only requires completion of an updated, signed agreement.

Once all requirements are complete, the agency dashboard will reflect the agency's RTS status after an overnight refresh.



# Broker Portal: Agency - Dashboard

Agencies have access to an additional Agency dashboard section where they can view Top Brokers, Downline Credentials, and AEP Downline Statuses.

This view helps agencies quickly monitor downline readiness and identify brokers who may still need to complete certification requirements.

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Dashboard

Statements

Book of Business

App Status

My Downline Brokers

Docs & Resources

My Credentials

My Account

Workflows

Scheduled Reports



Dashboard

Overview

Enrollments

Statements

Agency

Top Brokers

| NPN | Name | Active Members |
|-----|------|----------------|
|     |      | 152            |
|     |      | 118            |
|     |      | 101            |

Downline Credentials

|                   |                                       |
|-------------------|---------------------------------------|
| Downline Status   | 2830 Active/Certified   840 Suspended |
| Downline Licenses | 14330 Active   1208 Inactive          |

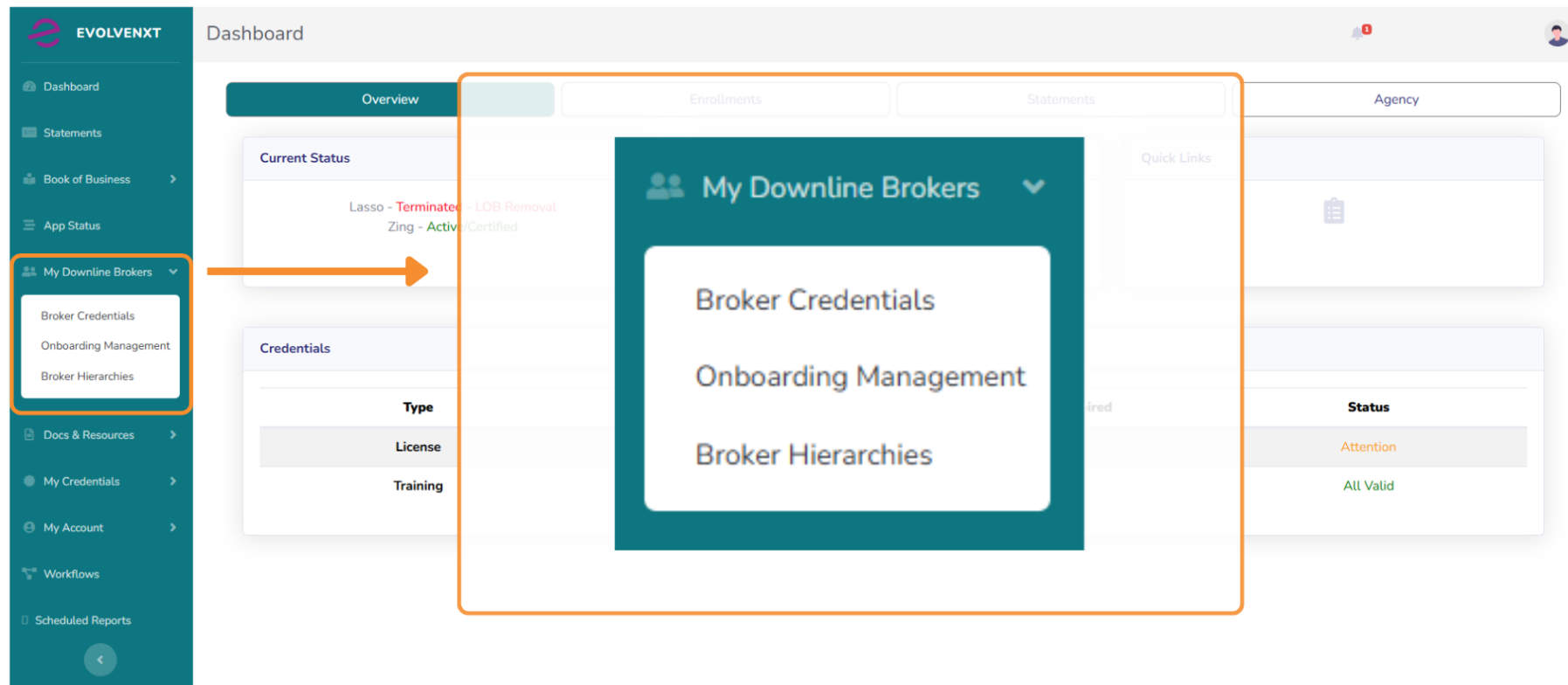
2027 AEP Downline Status

|                             |      |
|-----------------------------|------|
| 2027 AEP Ready Brokers      | 3307 |
| 2027 AEP Incomplete Brokers | 366  |

# Broker Portal: Agency - My Downline Brokers

Under **My Downline Brokers**, agencies can access three sections: Broker Credentials, Onboarding Management, and Broker Hierarchies.

Each section allows you to view and manage downline hierarchy information as needed.



View may vary based on your representative type.

# Broker Portal: Agency - My Downline Brokers | Broker Credentials

The **Broker Credentials** page allows you to download credential-related reports on demand.

Available reports include: Rep Status, License Info, Training Info, Contract Info, and Appointment Info.

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Dashboard

Statements

Book of Business

App Status

My Downline Brokers

- Broker Credentials
- Onboarding Management
- Broker Hierarchies

Docs & Resources

My Credentials

My Account

Workflows

Scheduled Reports

Broker Credentials

Rep NPN

Rep Name

SEARCH

DOWNLOAD REP STATUS

Report fields included:

- Agent Name
- Broker Type
- Sub Type
- NPN
- Broker Status
- Status Reason
- LOB
- State
- State Status
- AEP Status

DOWNLOAD LICENSE INFO

Report fields included:

- Agent Name
- Broker Type
- Sub Type
- NPN
- State
- Status
- Residency
- License #
- Class Name
- Effective Date
- Expiration Date

DOWNLOAD TRAINING INFO

Report fields included:

- Agent Name
- Broker Type
- Sub Type
- NPN
- Year
- Training Name
- Training Score
- Start Date
- End Date

DOWNLOAD CONTRACT INFO

Report fields included:

- Agent Name
- Broker Type
- Sub Type
- NPN
- Year
- Start Date
- End Date
- Contract Status

DOWNLOAD APPOINTMENT INFO

Report fields included:

- Agent Name
- Broker Type
- Sub Type
- NPN
- State
- Start Date
- End Date
- Rule Name
- Cocode
- Company
- LOA Product
- Appointment Method
- Appointment Staus

# Broker Portal: Agency - My Downline Brokers | Onboarding Mgmt

The **Onboarding Management** page allows agencies to create onboarding invitations for newly recruited agents.

Agencies can also view previously sent invitations, track invitation status, and cancel any open invitations as needed.

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Dashboard

Statements

Book of Business

App Status

My Downline Brokers

Docs & Resources

My Credentials

My Account

Workflows

Scheduled Reports

Onboarding Management

CREATE INDIVIDUAL INVITE

DOWNLOAD

Search:

|        | Name | Email | LOB                | Year | Type    | NPN | Rep Type     | Sales Level | Upline Name | Submitted By | Creation Date | Status        |
|--------|------|-------|--------------------|------|---------|-----|--------------|-------------|-------------|--------------|---------------|---------------|
| CANCEL |      |       | Medicare Advantage | 2027 | Initial |     | Field Broker | Agent       |             |              | 06/24/2026    | Created - New |
|        |      |       | Medicare Advantage | 2026 | Initial |     | Field Broker | Agent       |             |              | 06/09/2026    | Approved      |
|        |      |       | Medicare Advantage | 2026 | Initial |     | Field Broker | Agent       |             |              | 06/08/2026    | Approved      |
|        |      |       | Medicare Advantage | 2026 | Initial |     | Agency       | FMO         |             |              | 06/05/2026    | Approved      |
|        |      |       | Medicare Advantage | 2026 | Initial |     | Field Broker | Agent       |             |              | 06/04/2026    | Approved      |
| CANCEL |      |       | Medicare Advantage | 2026 | Initial |     | Field Broker | Agent       |             |              | 05/29/2026    | Created - New |

# Broker Portal: Agency - Onboarding Mgmt | Create Invite

When creating an onboarding invitation, agencies will need the agent's NPN and a unique email address. When onboarding an agency, the agency invitation must be sent first before any downline agent invitations are created.

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Onboarding Management

Dashboard

Statements

Book of Business

App 7

My D

Docs

My Credentials

My A

World

Sched

CREATE INDIVIDUAL INVITE

DOWNLOAD

Create New Onboarding Case

Onboarding Type \*

INITIAL

LoB \*

ZING - MA

Rep Type \*

Sub Type \*

Sales Level \*

NPN \*

Email \*

Immediate Upline \*

CHANGE NEXT UPLINE

CREATE CASE

Rep Type Options

Rep Type should align with the agents primary selling mode.

Agency - contracted at a higher level to support a downline structure.

Field Broker - Primarily selling locally at in person appointments

Telesales Broker - Primarily selling over the phone as part of a call center structure

Sub Type Description

Downline Only - Broker has an upline, broker receives their own commissions.

Licensed Only Agent - Broker has an upline, commissions are assigned to this upline. Broker does not own the book of business.

Dual Assignment - Broker has an upline, commissions are assigned to this upline. Broker owns the book of business.

Principal - Selling - Principal of an Agency

Principal Invitations

When sending a Principal invitation:

Always select Principal - Selling, regardless if they sell or not.

Must provide a different email than used for the agency.

06/08/2026

Approved

06/05/2026

Approved

06/04/2026

Approved

MAKE SURE TO CHANGE NEXT UPLINE WHEN SENDING EXTENDED DOWNLINE INVITATIONS.

# Broker Portal: Agency - My Downline Brokers | Broker Hierarchies

The **Broker Hierarchies** page allows agencies to search, review, and download their downline hierarchy structure..

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Dashboard

Statements

Book of Business

App Status

My Downline Brokers

- Broker Credentials
- Onboarding Management
- Broker Hierarchies

Docs & Resources

My Credentials

My Account

Workflows

Scheduled Reports

Broker Hierarchies

Rep Name

Rep NPN

SubType

Sales Level

Next Name

Next NPN

SEARCH

DOWNLOAD

Show 10 entries

Search:

| Rep Name | NPN | Start Date | End Date | Sales Level | Next Upline | Assigned Comp Name | Sub Type            | Rep Type         |
|----------|-----|------------|----------|-------------|-------------|--------------------|---------------------|------------------|
|          |     | 10/09/2020 |          | 01 - Agent  |             |                    | Downline Only       | Field Broker     |
|          |     | 10/12/2020 |          | 01 - Agent  |             |                    | Downline Only       | Field Broker     |
|          |     | 06/02/2021 |          | 01 - Agent  |             |                    | Licensed Only Agent | Field Broker     |
|          |     | 09/26/2021 |          | 01 - Agent  |             |                    | Downline Only       | Field Broker     |
|          |     | 07/02/2021 |          | 01 - Agent  |             |                    | Licensed Only Agent | Field Broker     |
|          |     | 07/01/2021 |          | 01 - Agent  |             |                    | Licensed Only Agent | Field Broker     |
|          |     | 07/07/2021 |          | 01 - Agent  |             |                    | Downline Only       | Field Broker     |
|          |     | 10/12/2021 |          | 01 - Agent  |             |                    | Licensed Only Agent | Telesales Broker |
|          |     | 01/02/2023 |          | 01 - Agent  |             |                    | Licensed Only Agent | Field Broker     |
|          |     | 10/18/2021 |          | 01 - Agent  |             |                    | Licensed Only Agent | Field Broker     |

Showing 1 to 10 of 3,671 entries

First

Previous

1

2

3

4

5

...

368

Next

Last

# Broker Portal: Agency - My Credentials | Downline Credentials

The **Downline Credentials** page allows agencies to quickly review a downline broker's status, licensing, training, contracts, and appointments.

For example, when an agent is showing Suspended - Pending Training, agencies can search for the agent, select View Details, and review the information directly in the Broker Portal. This helps agencies resolve basic credential questions without relying on separate reports.

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Dashboard

Statements

Book of Business

App Status

My Downline Brokers

Docs & Resources

My Credentials

My Certification Cases

Downline Credentials

My Status & Credentials

Manage My Licenses

My Account

Workflows

Scheduled Reports

Downline Credentials

Rep NPN

Rep Name

SEARCH

Search:

| Rep Name                     | Rep NPN | Rep Status                   | License Status       |
|------------------------------|---------|------------------------------|----------------------|
| <a href="#">View Details</a> |         | Active/Certified             | 7 Active   0 Expired |
| <a href="#">View Details</a> |         | Active/Certified             | 4 Active   0 Expired |
| <a href="#">View Details</a> |         | Active/Certified             | 2 Active   0 Expired |
| <a href="#">View Details</a> |         | Active/Certified             | 7 Active   0 Expired |
| <a href="#">View Details</a> |         | Suspended - Pending Training | 1 Active   0 Expired |

REP NAME

My Status Info

Sales States & Licenses

Training Info

Contract Info

Appointment Info

| LOB | Active Contract | Active Training | Rep Status                   |
|-----|-----------------|-----------------|------------------------------|
| MA  | Yes             | No              | Suspended - Pending Training |

Showing 1 to 1 of 1 entries

First

Previous

1

Next

Last

# Broker Portal: Agency - Scheduled Reports

Agencies have access to a number of automated reports which can be sent via email directly from the system. The **Scheduled Reports** tab allows you to create new reports and view reports actively being sent.

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Dashboard

Statements

Book of Business

App Status

My Downline Brokers

Docs & Resources

My Credentials

My Account

Workflows

Scheduled Reports

Scheduled Reports

In this menu item, you can subscribe to the automated report delivery service. The delivery methods are either email or SFTP and the frequency can be configured as daily, weekly, or monthly. To initiate this service, click the **Create** button and complete the configuration options. To edit or deactivate an existing report automation, click the **View** button of that record.

CREATE

Search:

|      | Name                                  | Active | Type  | Frequency | First Delivery |
|------|---------------------------------------|--------|-------|-----------|----------------|
| VIEW | Master Rep Status Report              | Yes    | Email | Daily     | 2023-09-22     |
| VIEW | Master Rep Status Report with Sub ToH | Yes    | Email | Daily     | 2026-06-18     |

Showing 1 to 2 of 2 entries

Previous

1

Next

# Broker Portal: Scheduled Reports (Agencies Only)

Choose from Rep License Report, Onboarding Report, Rep Status All Hierarchies Report, and Master Rep Status Team Level Report. Production and Application Status reports are currently in a testing phase.

The Master Rep Status Team Level Report provides the greatest detail and is the recommended report.

Report Details

Report Template

--

Rep License Report

Onboarding Report

Rep Status All Hierarchies Report

Master Rep Status Team Level Report

File Name\*

First Delivery\*

06/19/2026

Delimiter

Tab

Data Wrapper

None

Export Time Format

None

File Export Delimiter

-

Email Recipients

Insert in a comma separated list if sending multiple.

To:

Cc:

Bcc:

SAVE

**Questions? We're here to help!**

**brokers@myzinghealth.com**

**1-844-946-4226**

**[Find your local contact](#)**

