2026 - 2027

Broker Onboarding, Recertification, & Portal Guide

Zing HEALTH™

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Onboarding

Onboarding: New Broker Invitation

Once an onboarding invitation has been generated, you will receive an email from **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

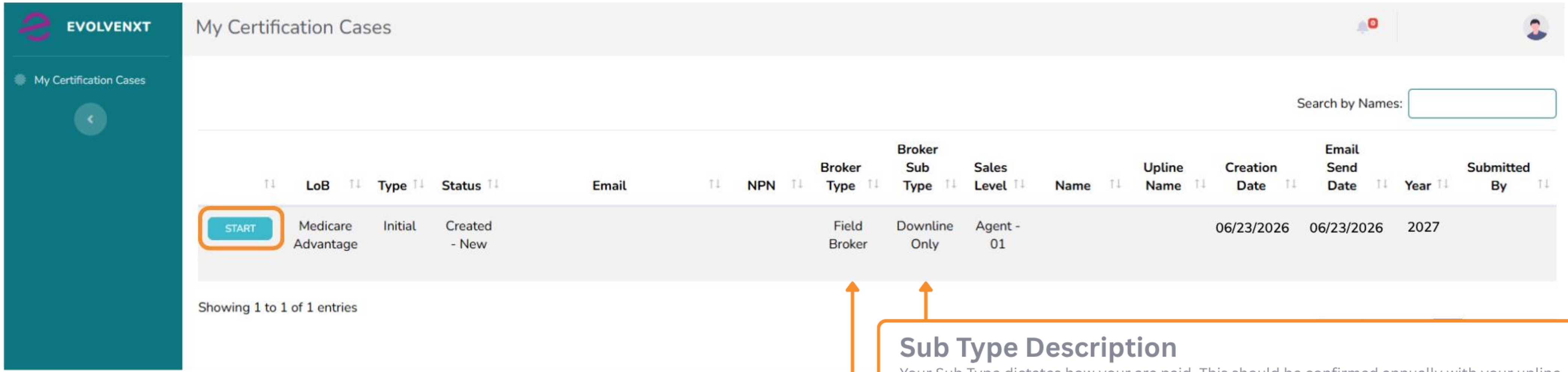
If you have trouble accessing the registration portal, please use the Lost Password function.
For further assistance, contact us at Brokers@myzinghealth.com or call 844-946-4226 (Monday–Friday, 8 AM – 5 PM CT).

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.



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

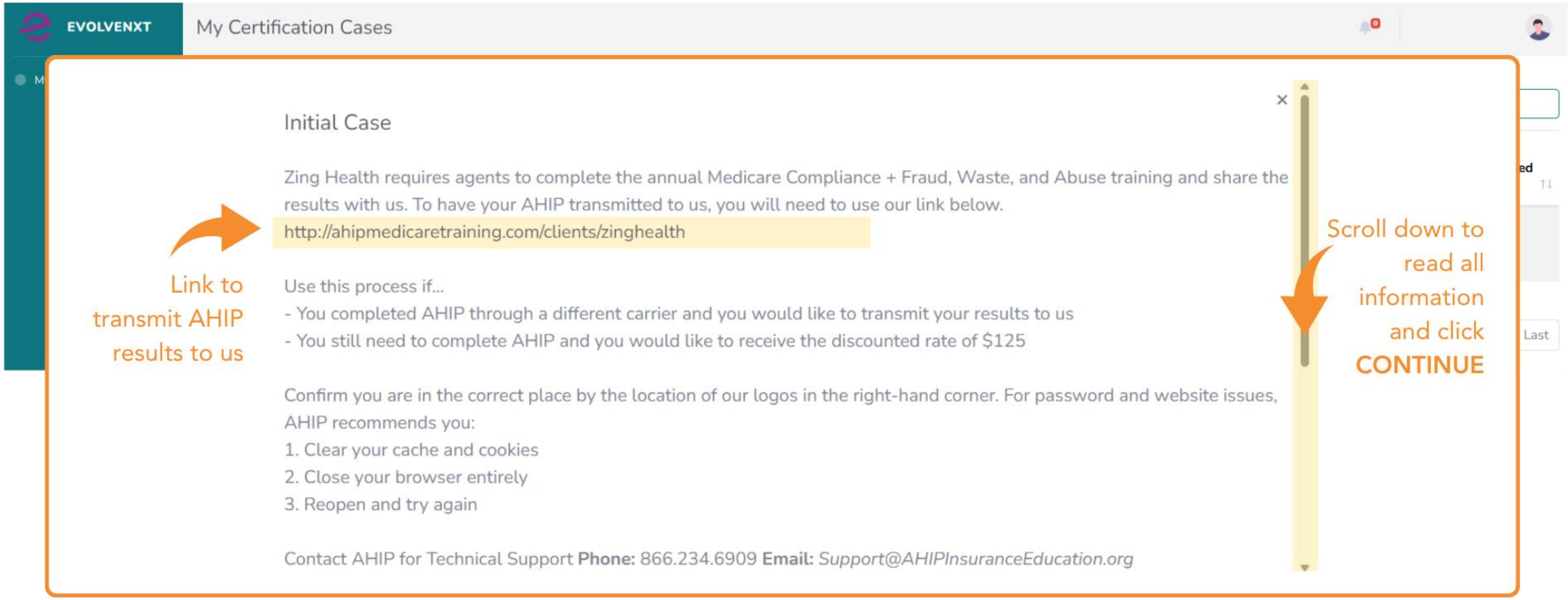
Your Rep Type should align with your primary selling mode.

- **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.

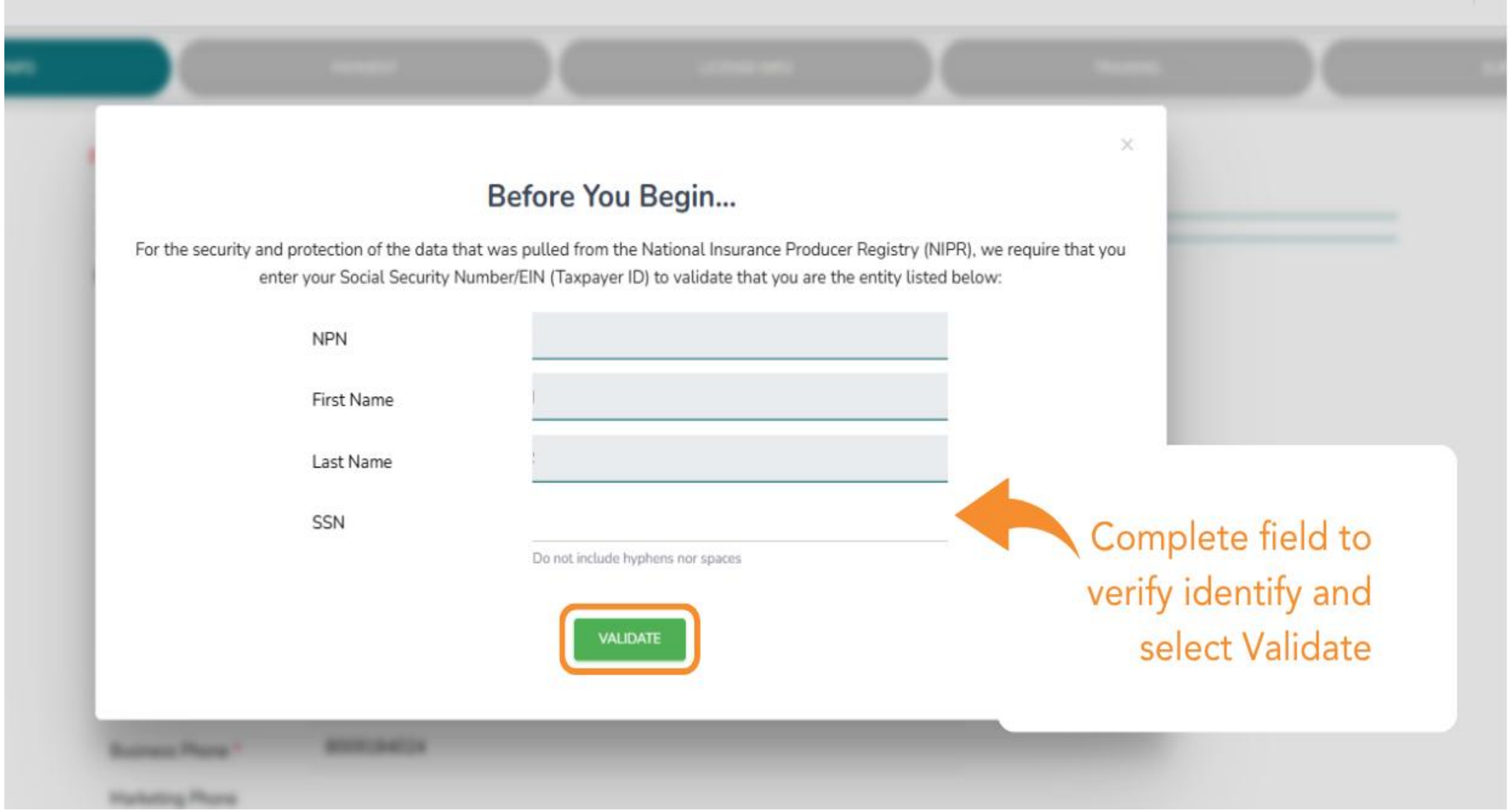
Please confirm you have the following information available: SSN, upline information, and payee/W-9 information, if applicable.



View may vary based on your representative type.

Onboarding: Security Validation

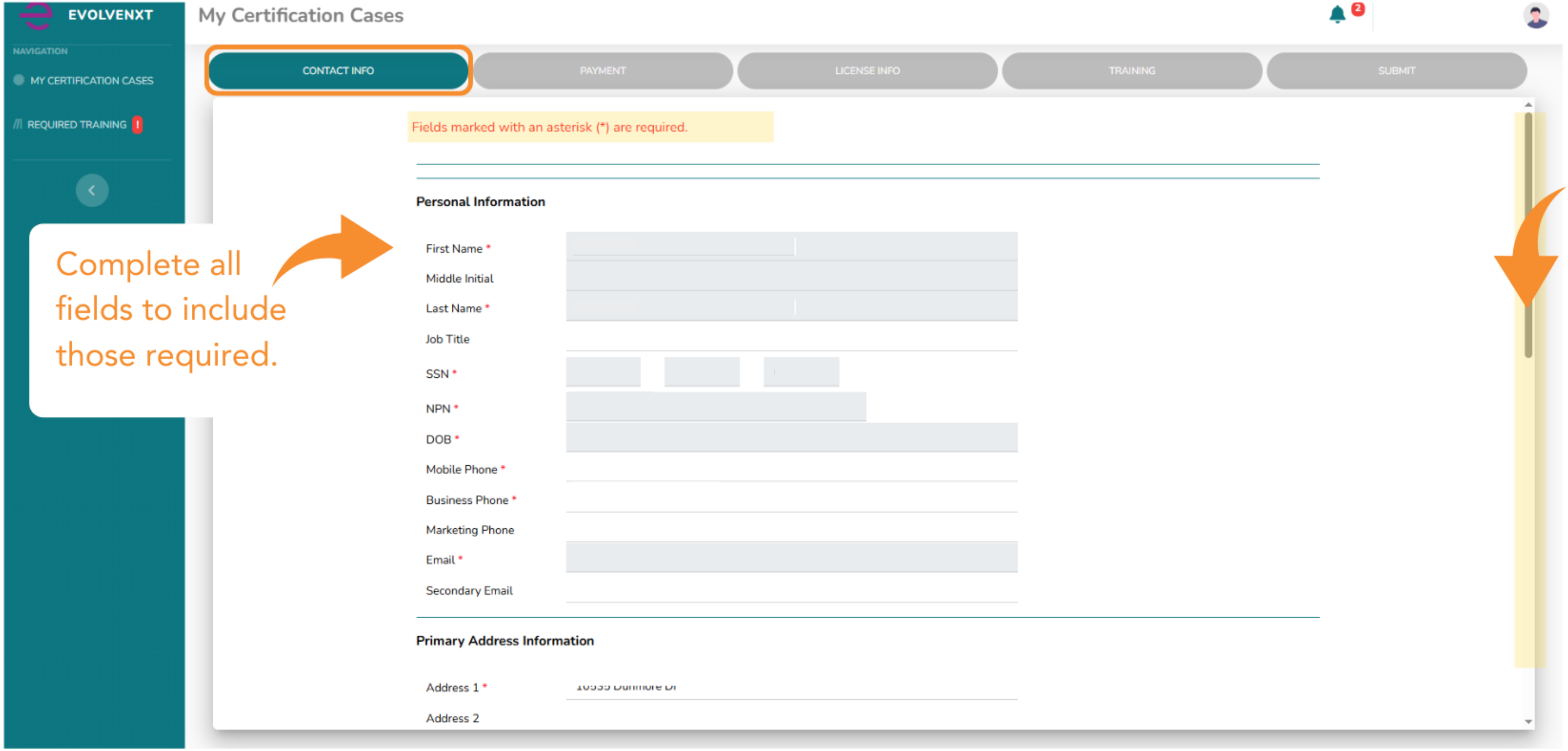
For the security and protection of the data that was pulled from the National Insurance Producer Registry (NIPR), we require that you enter your Social Security Number/EIN (Taxpayer ID) to validate that you are the entity listed below:



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.



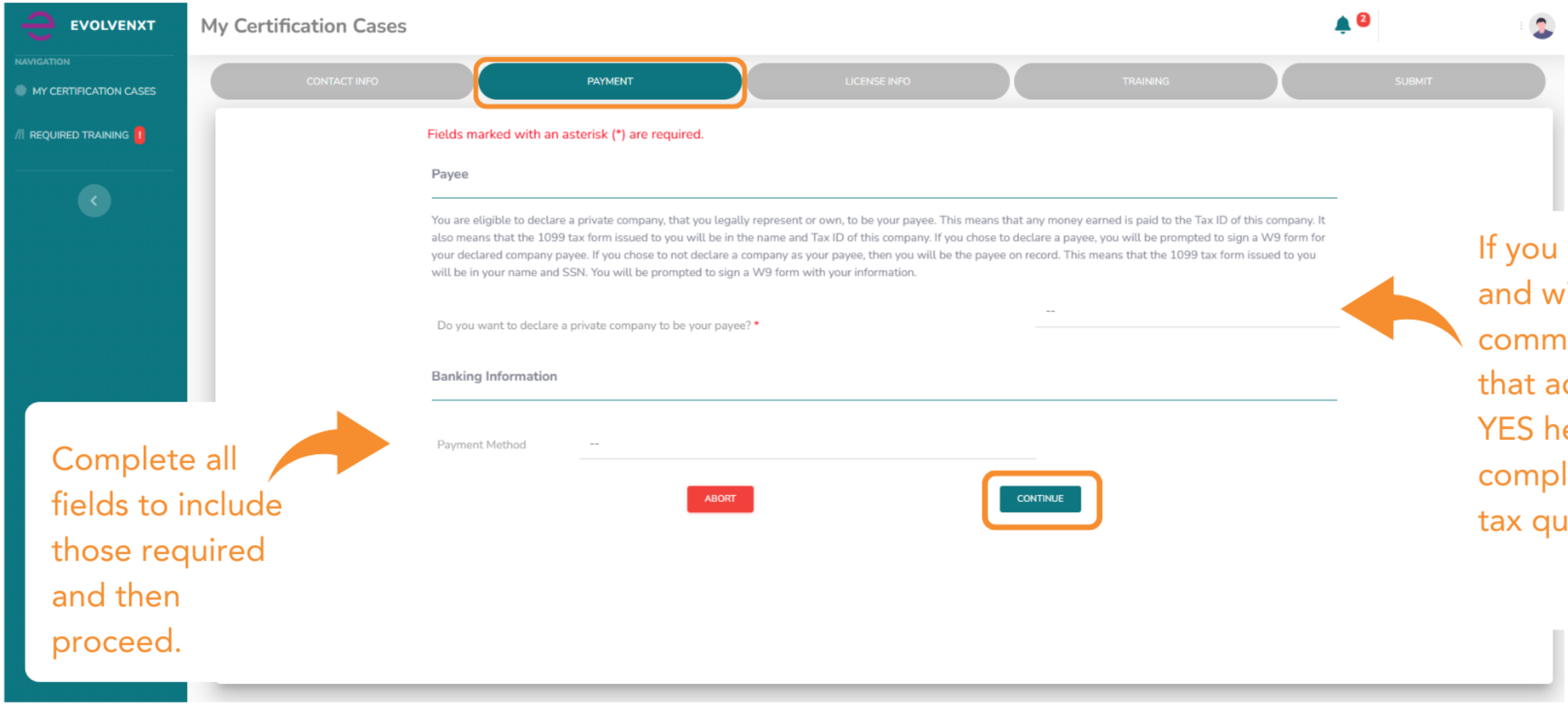
Complete all fields to include those required.

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.



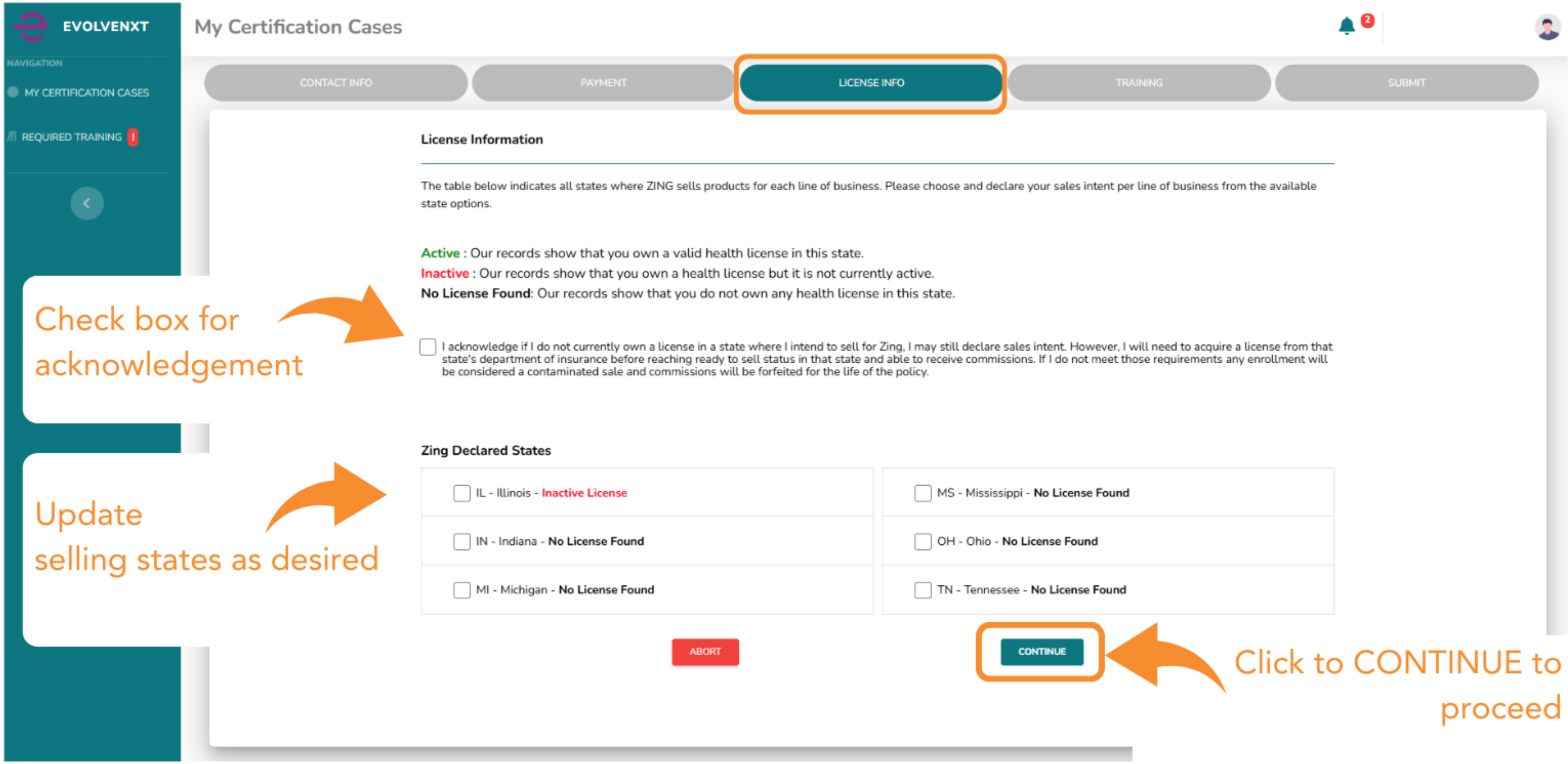
Complete all fields to include those required and then proceed.

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

View may vary based on your representative type.

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.



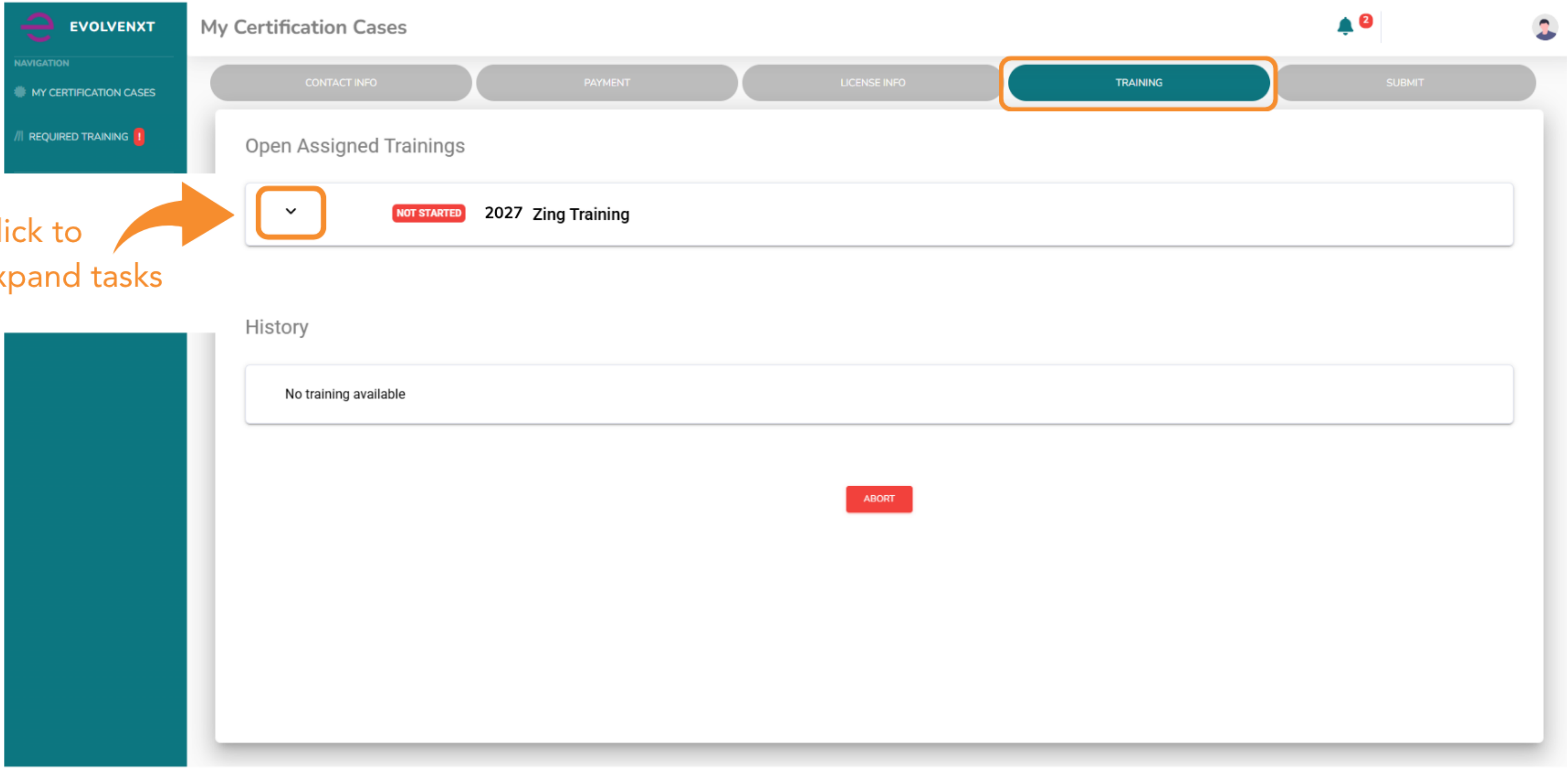
Check box for acknowledgement

Update selling states as desired

Click to CONTINUE to proceed

View may vary based on your representative type.

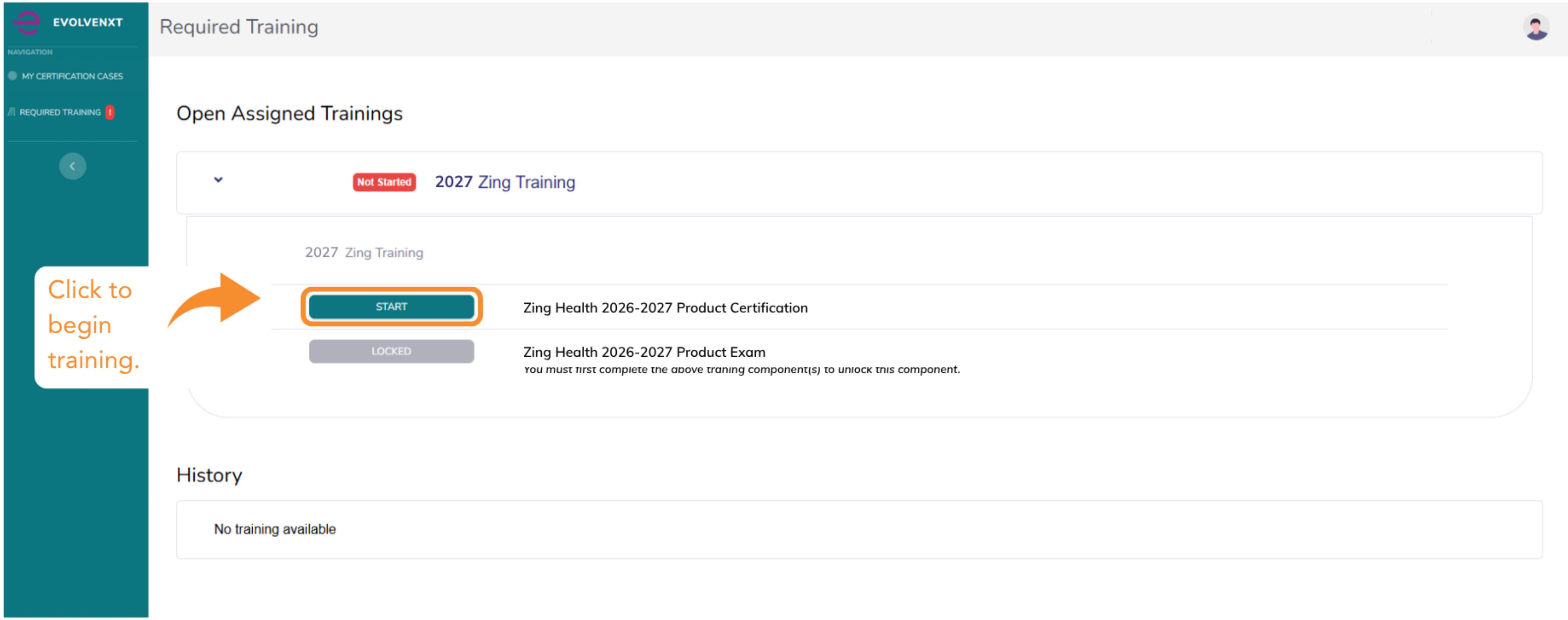
Onboarding: Assigned Training



Click to expand tasks

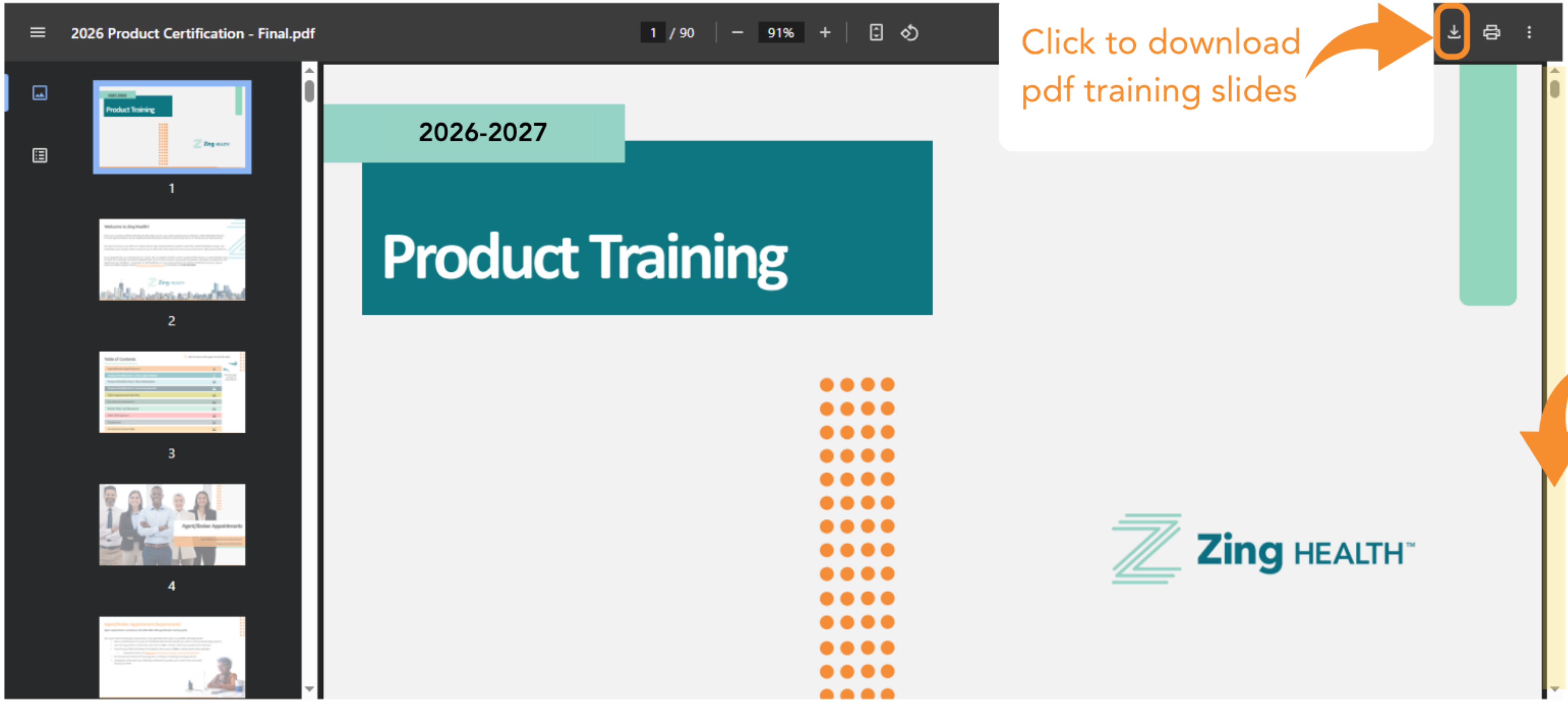
Onboarding: Assigned Training Start

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



Onboarding: Assigned Product Training

Zing Health 2026-2027 Product Certification



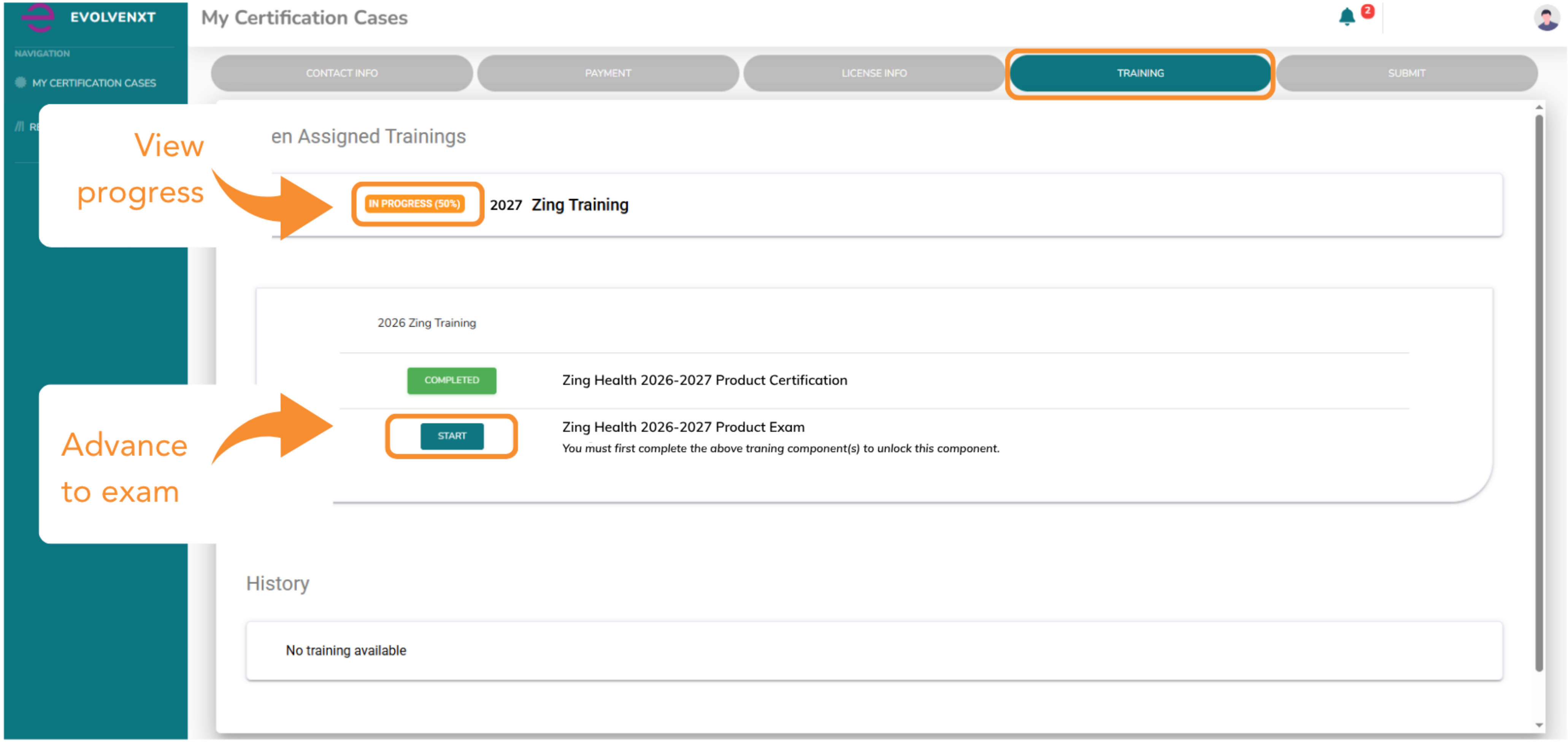
Click to download pdf training slides

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

Scroll down to view training slides within the system

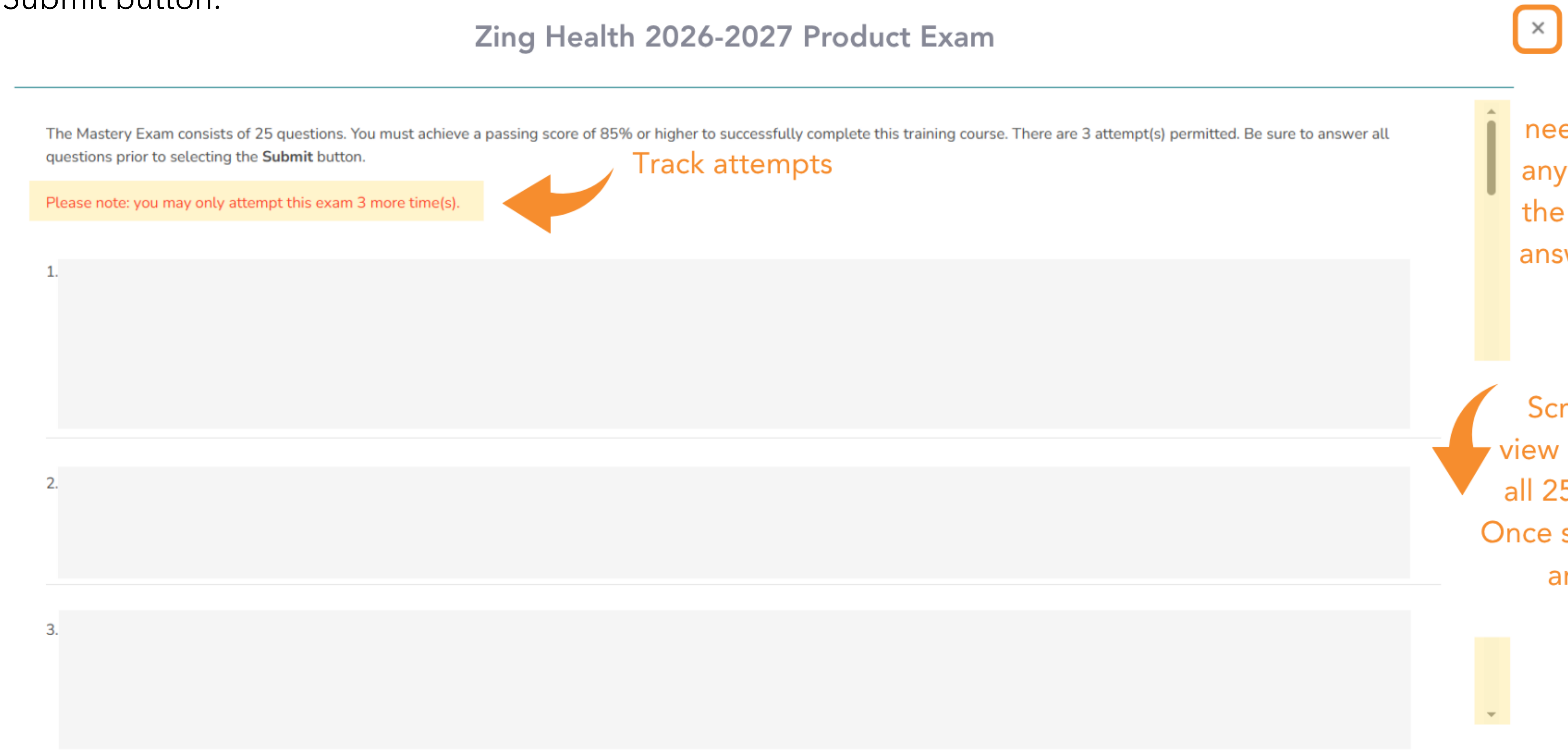
Onboarding: Advance to Exam

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.



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.



Track attempts

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%**

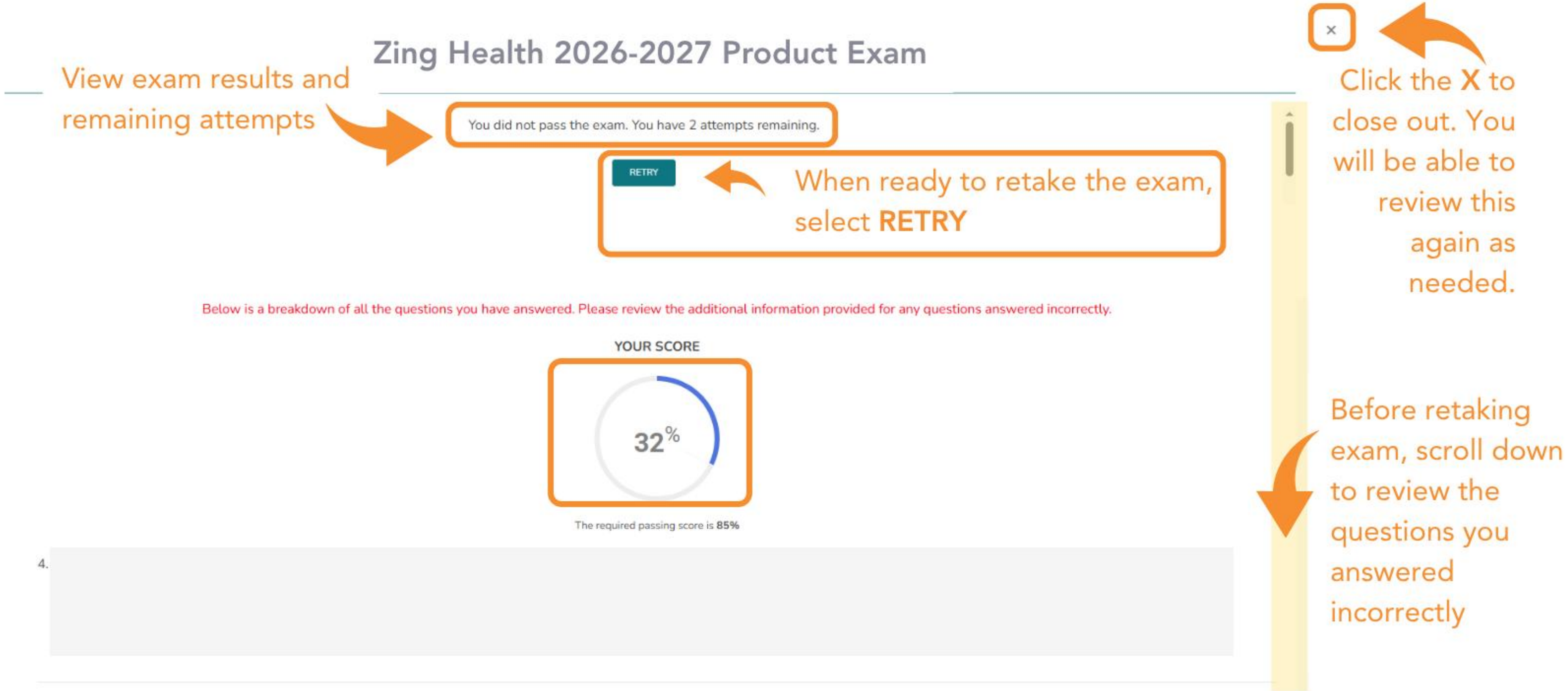
×

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

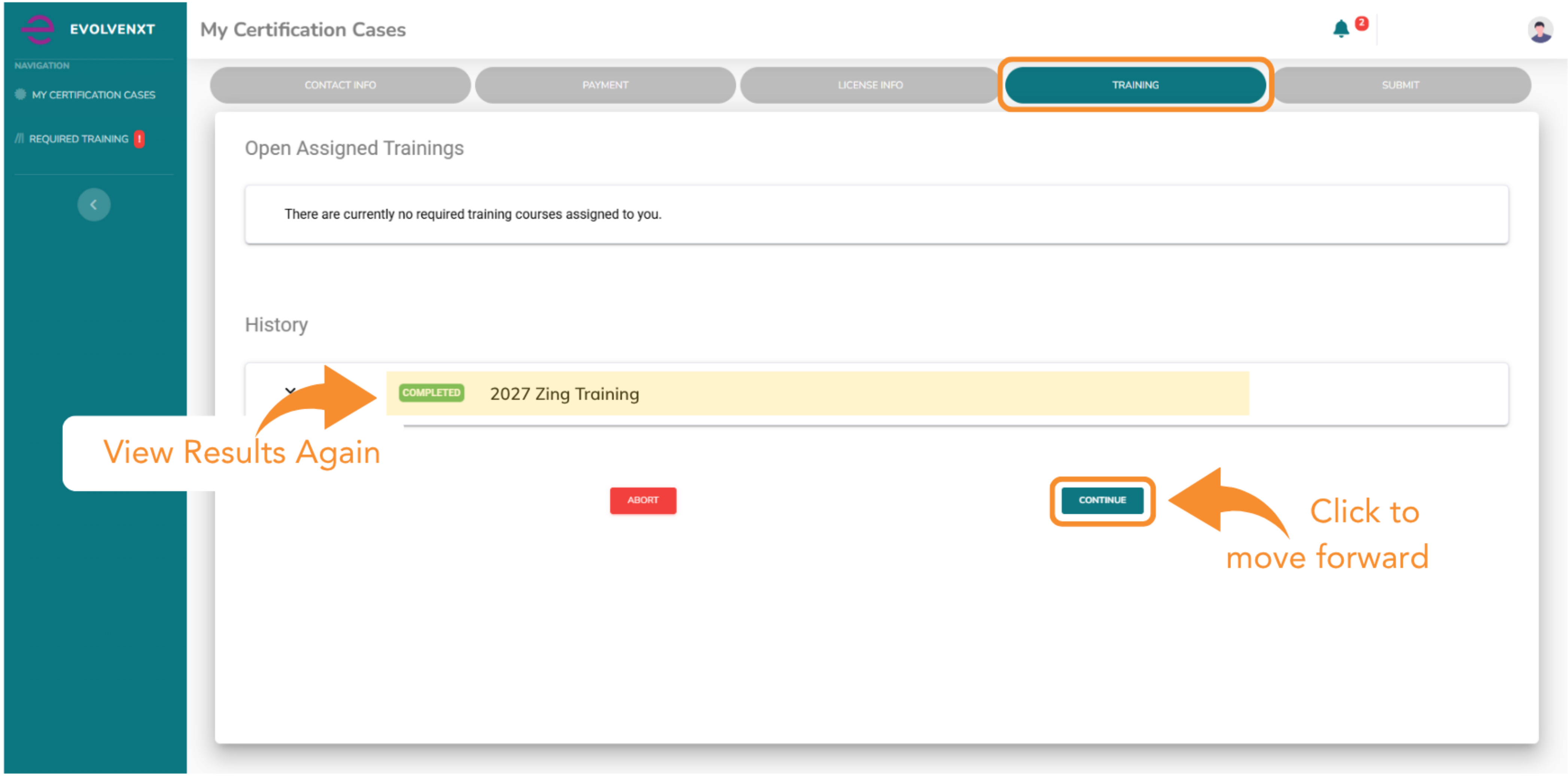
Onboarding: Exam Results - Failed

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.



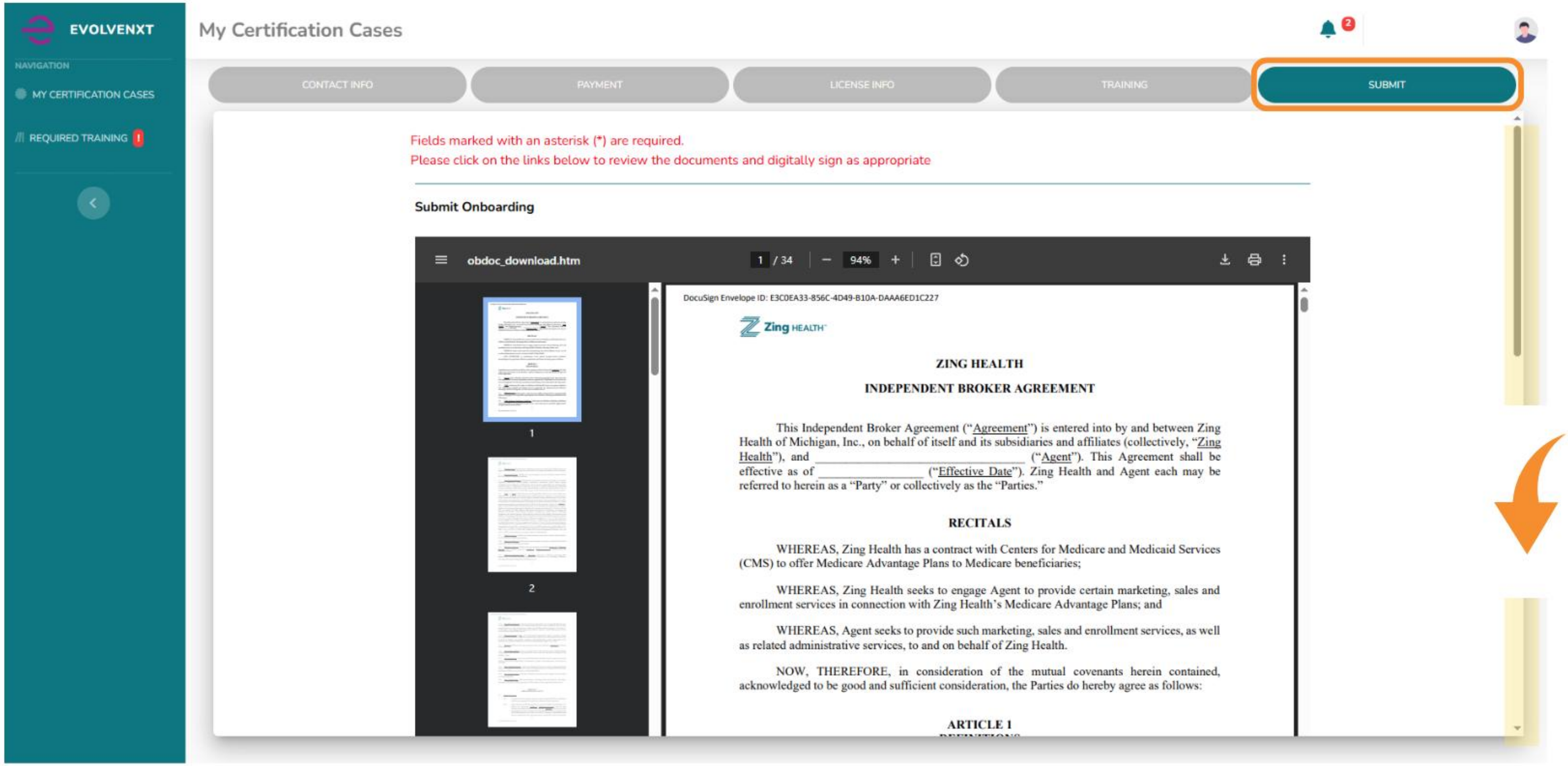
Onboarding: Assigned Training Complete

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



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.



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

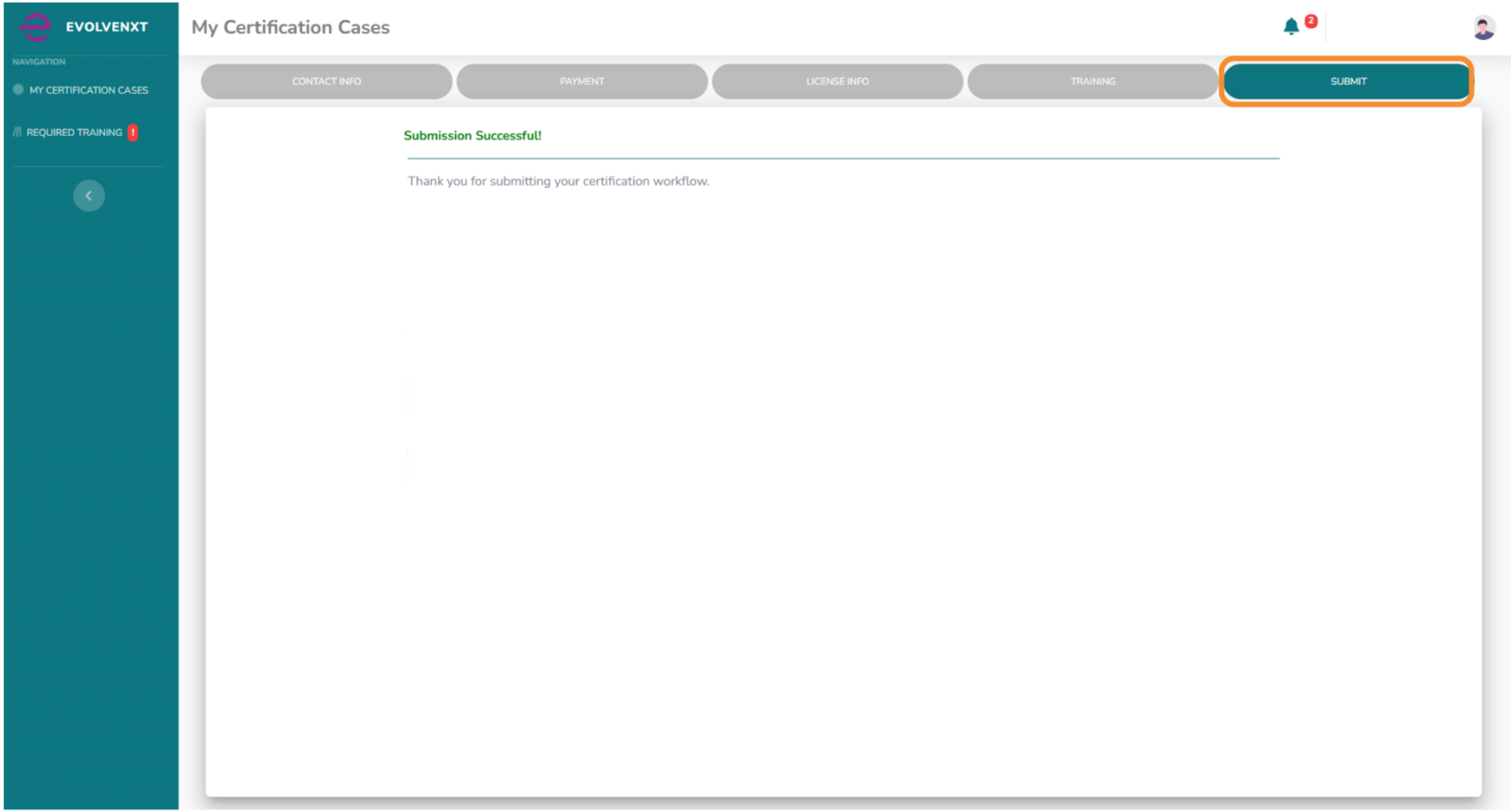
ABORT

Click to SUBMIT

SUBMIT

View may vary based on your representative type.

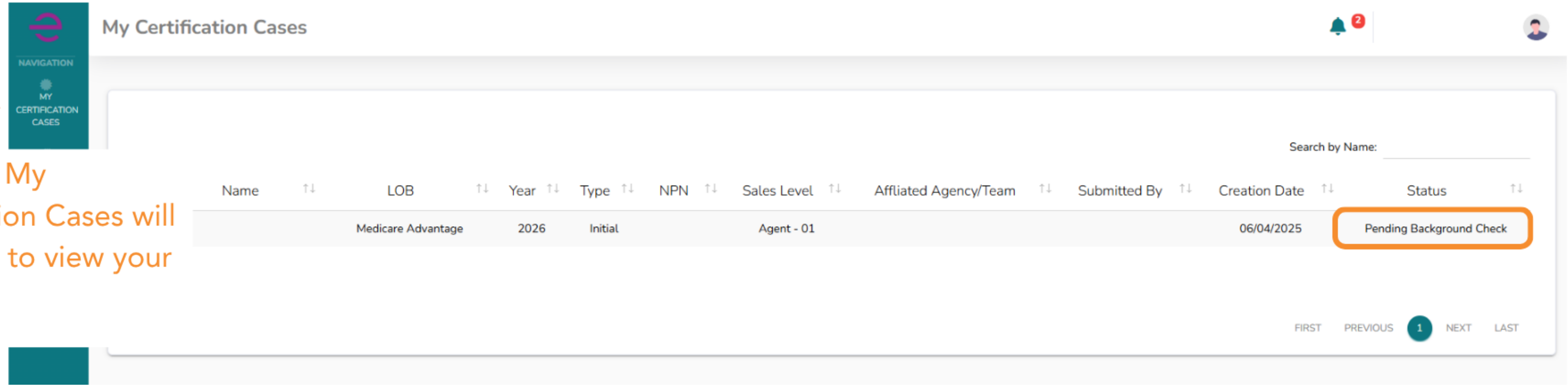
Onboarding: Submission Successful



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.



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***

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 or call 844-946-4226 (Monday–Friday, 8 AM – 5 PM CT).

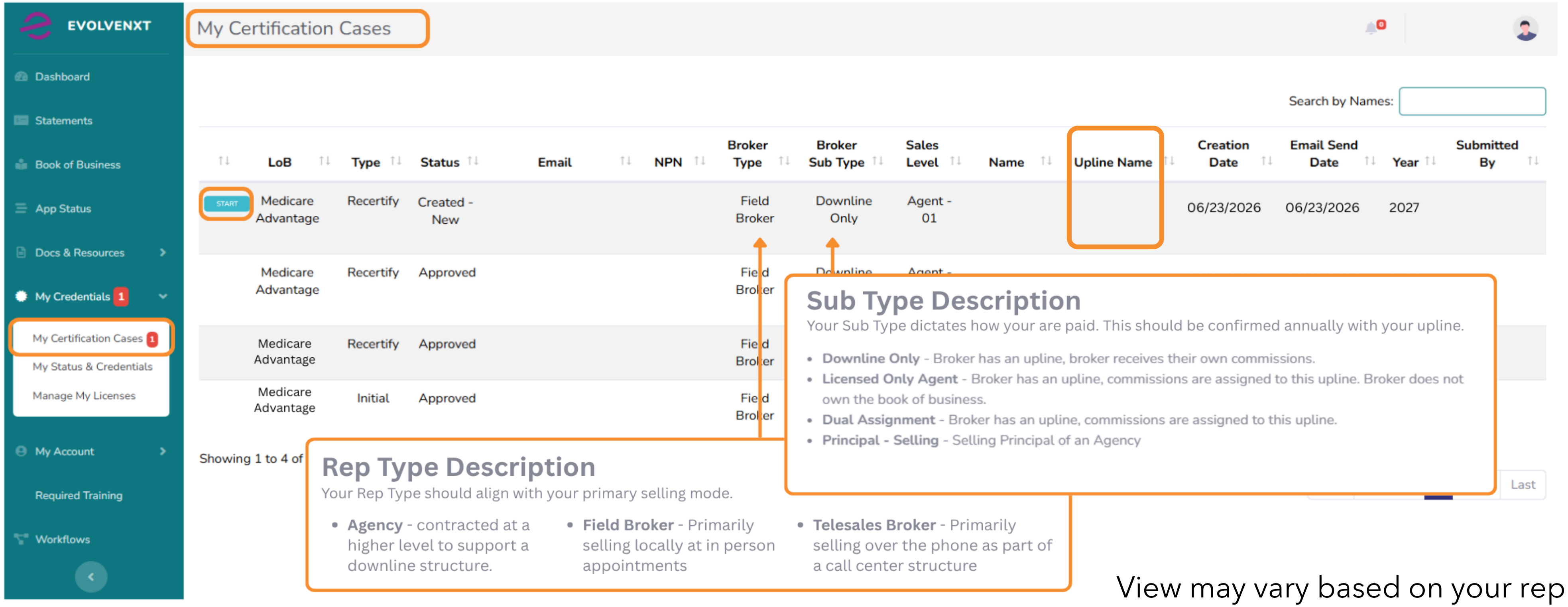
If you are unsure why you are receiving this email, please reach out to your Zing Health upline.
We look forward to your continued partnership!
Thank you,
Zing Health

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.***

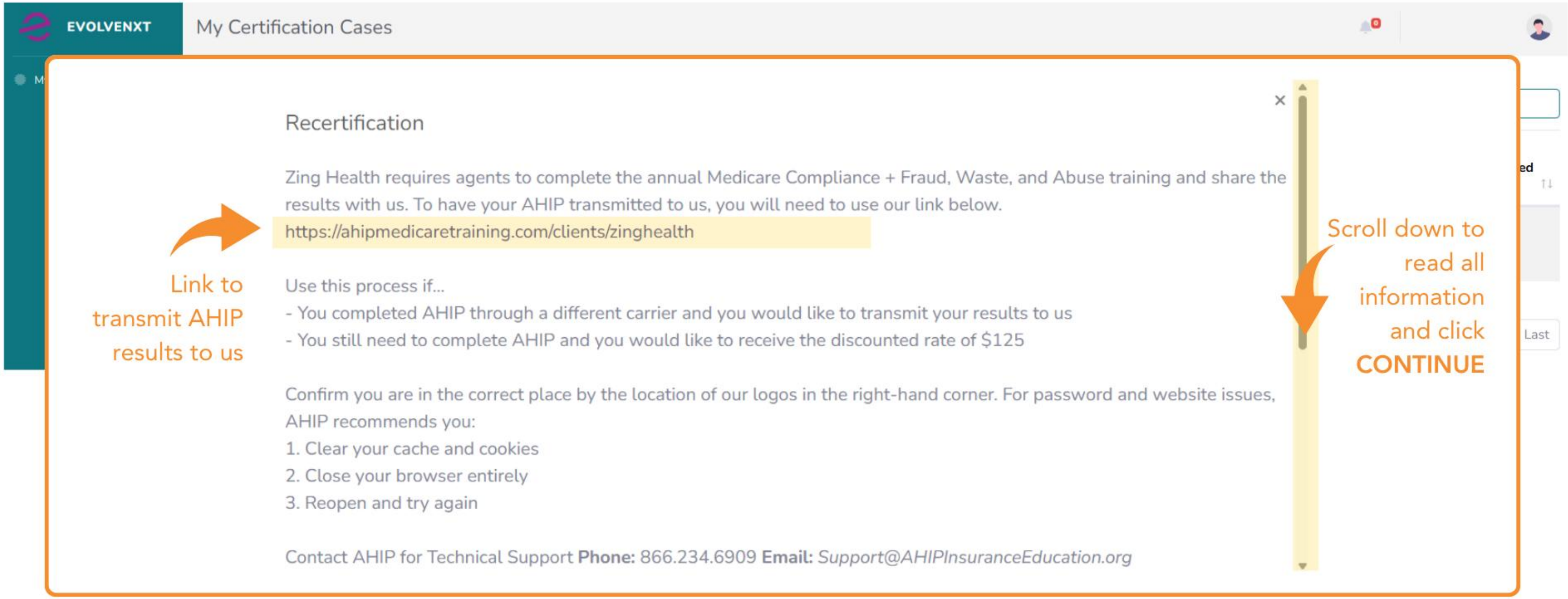
If all information is correct, select "START" to begin.



View may vary based on your representative type.

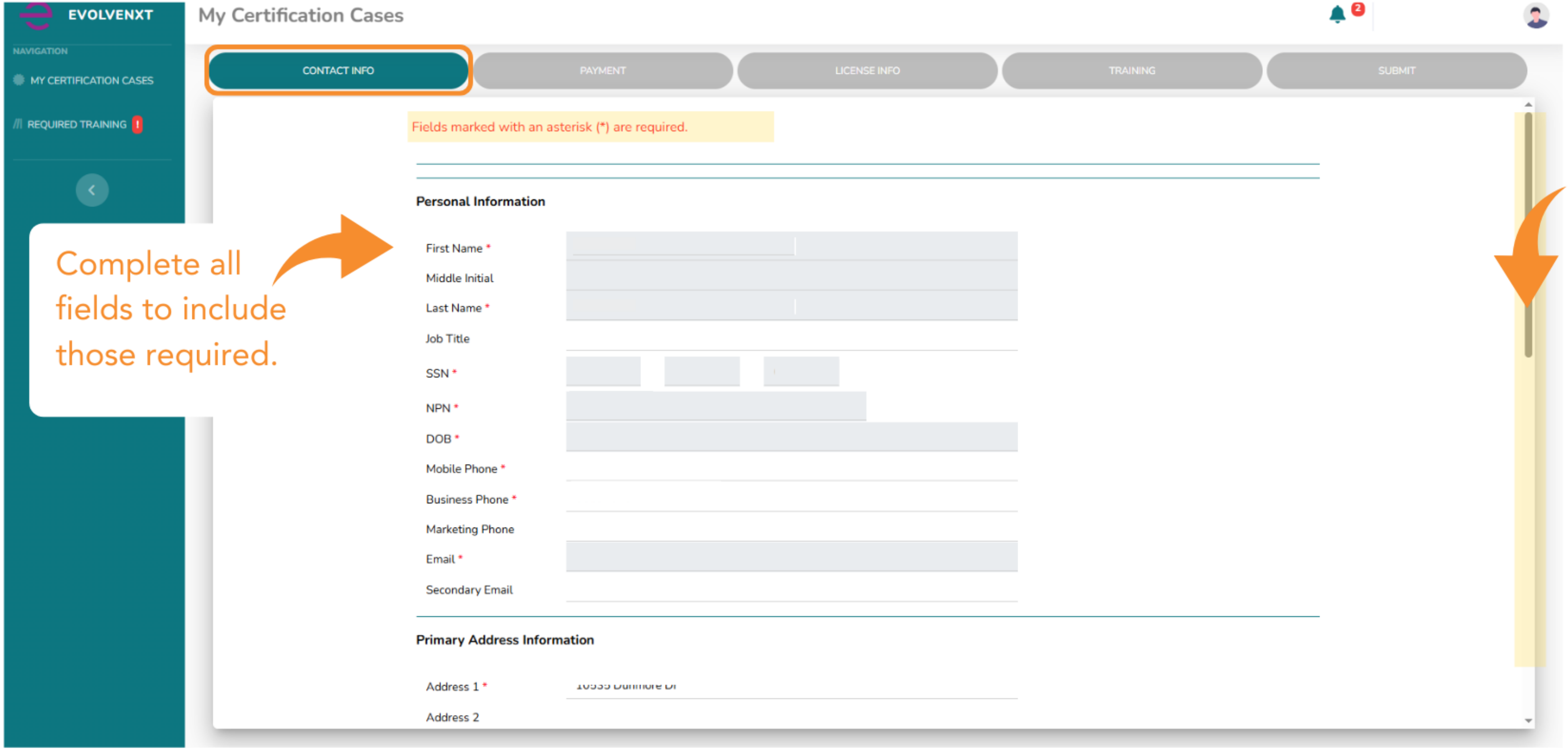
Recertification: AHIP Prompt

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.



View may vary based on your representative type.

Recertification: Contact Info

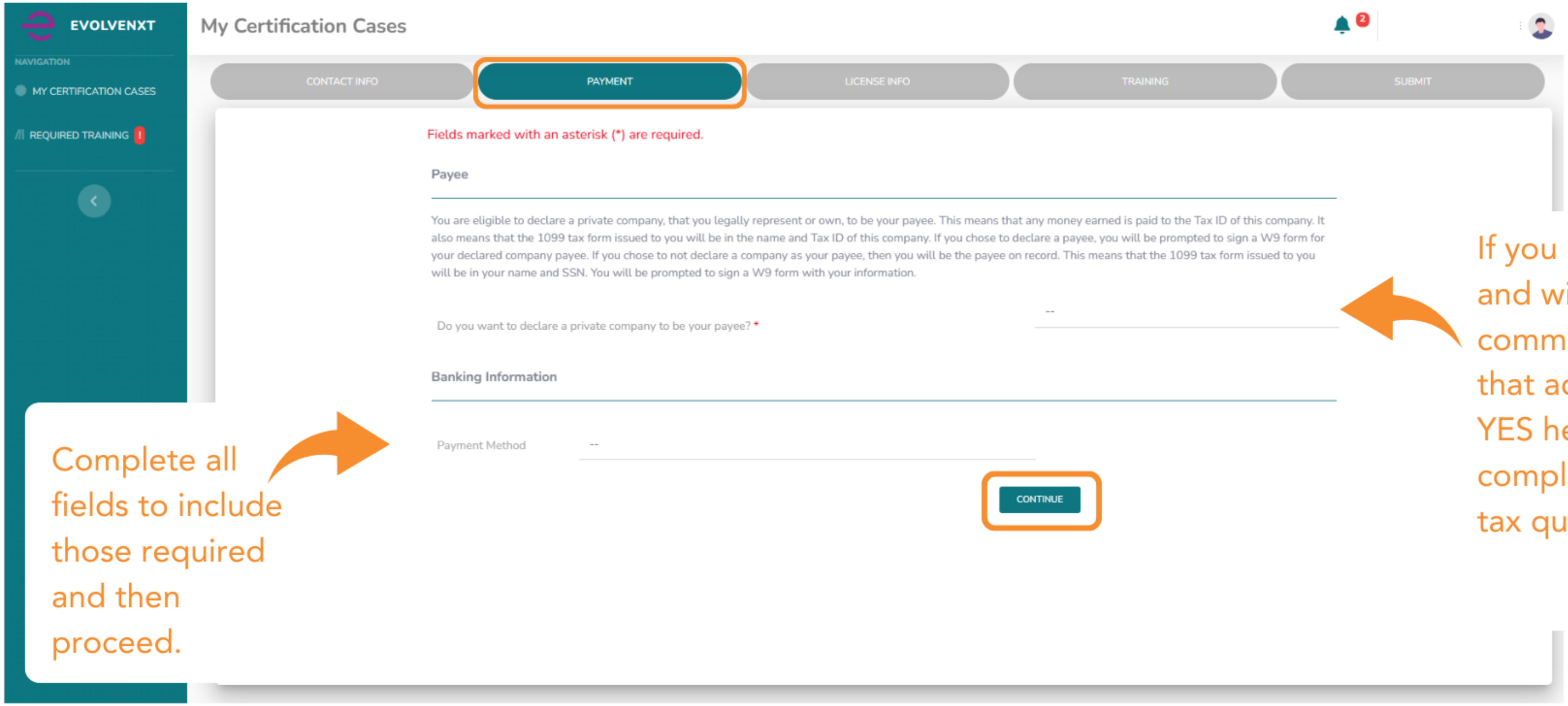


Complete all fields to include those required.

Scroll to complete all information and proceed

View may vary based on your representative type.

Recertification: Payment



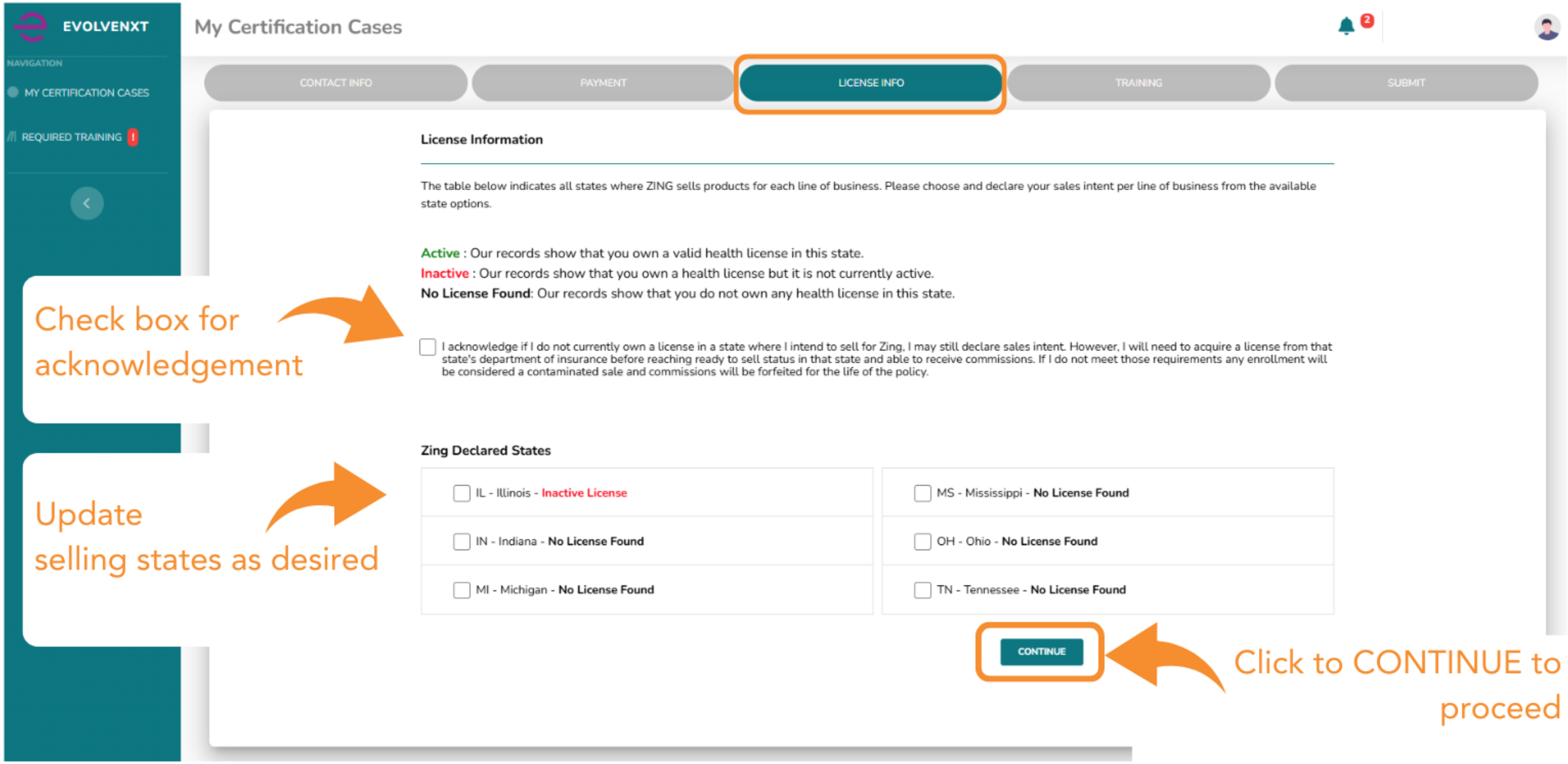
Complete all fields to include those required and then proceed.

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

View may vary based on your representative type.

Recertification: License Info

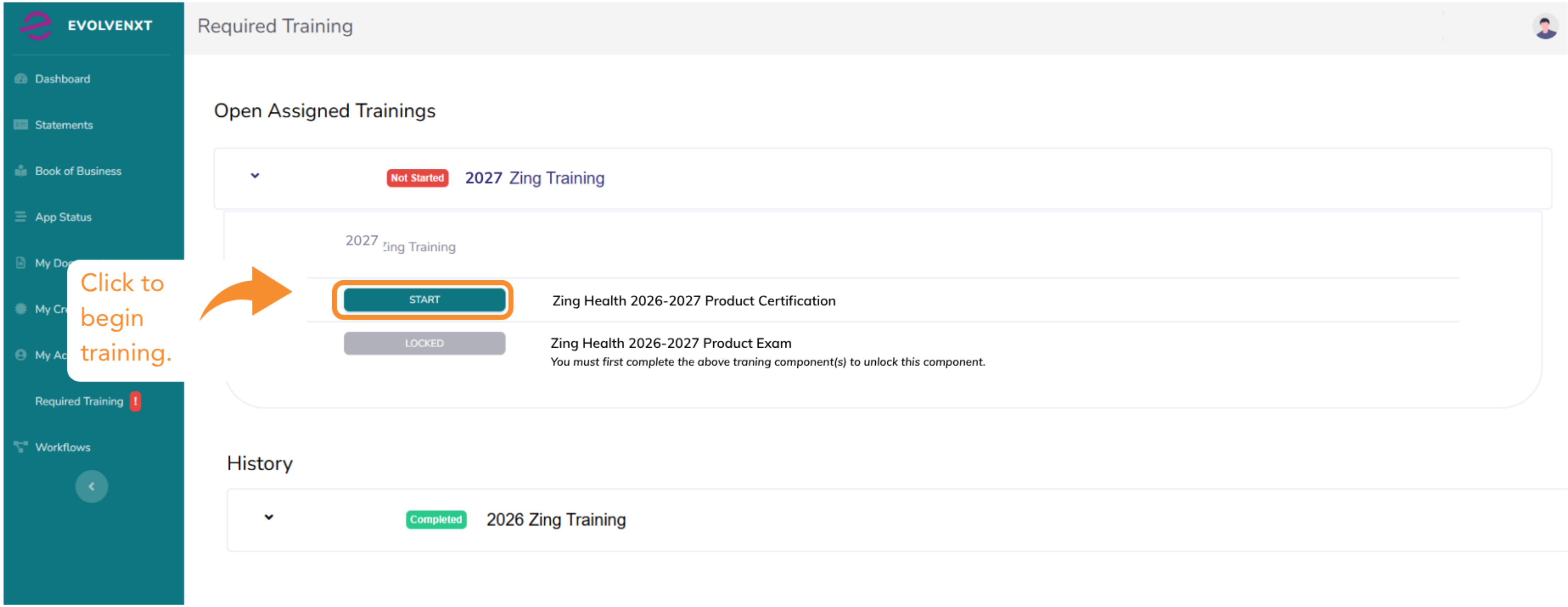
Verify the states you wish to sell in. To support appointment cost management, we ask you only declare states where you have an active business need. You can update your declared states at any point throughout the year.



View may vary based on your representative type.

Recertification: Assigned Training Start

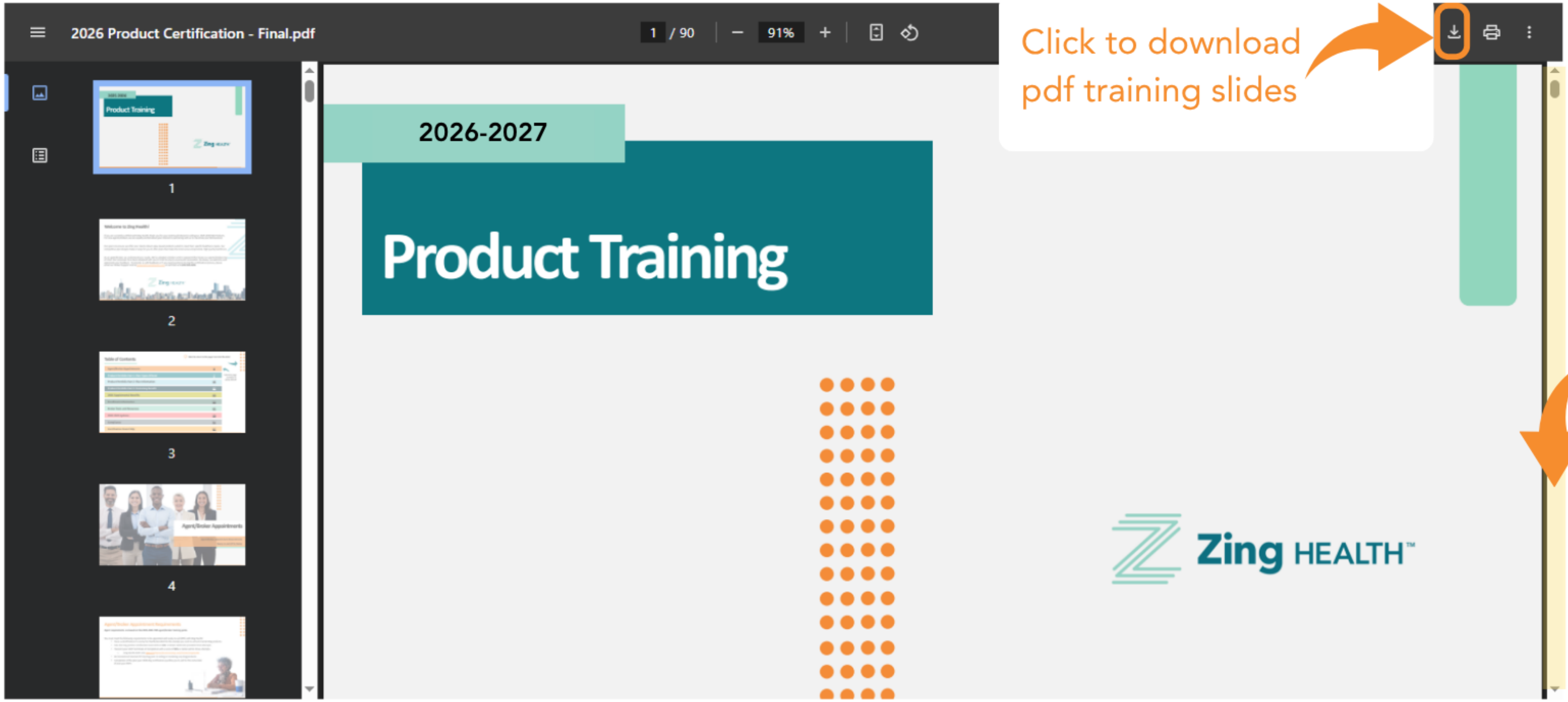
Upon clicking “Start” you will be given an opportunity to study for the exam and download training materials.



View may vary based on your representative type.

Recertification: Assigned Product Training

Zing Health 2026-2027 Product Certification



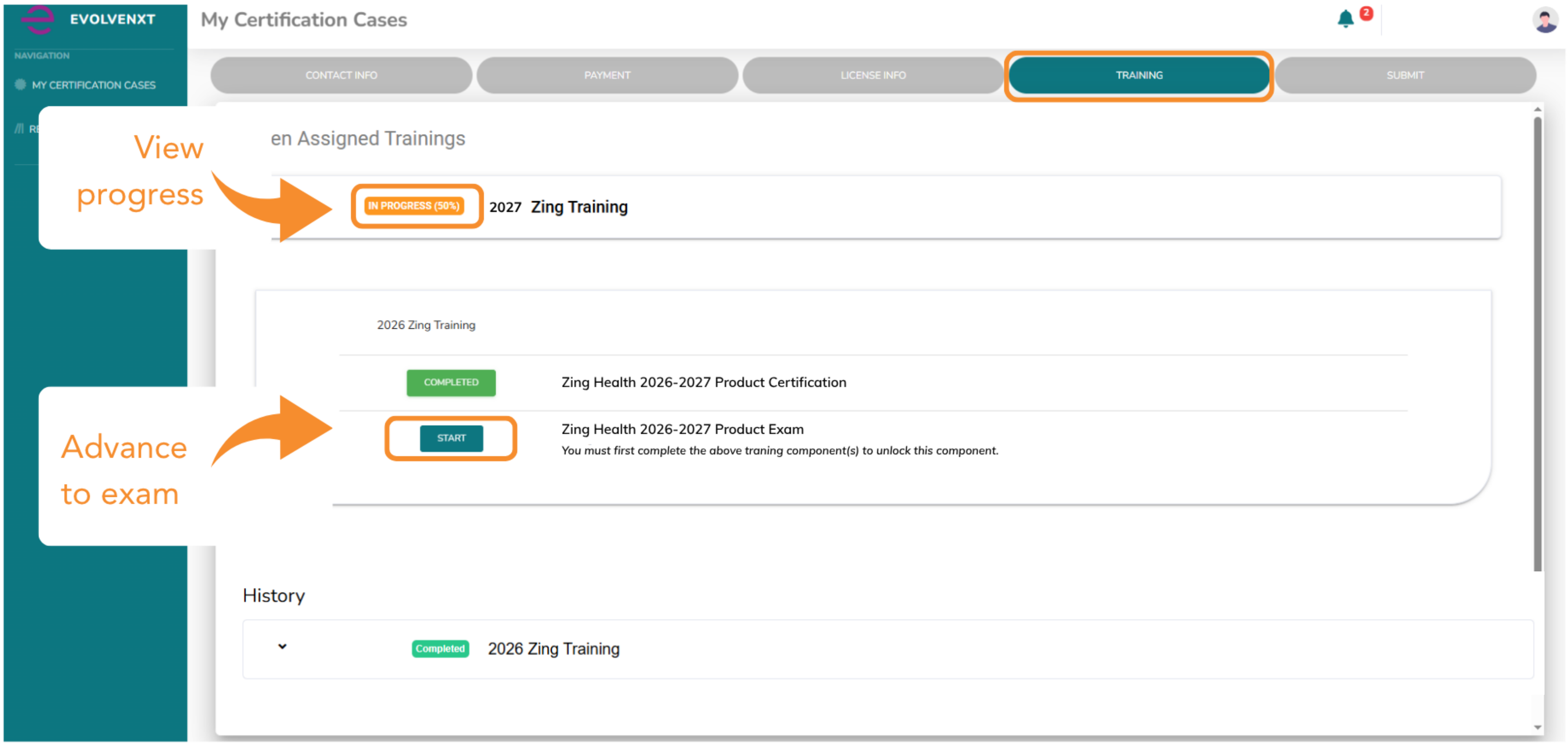
Click to download pdf training slides

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

Scroll down to view training slides within the system

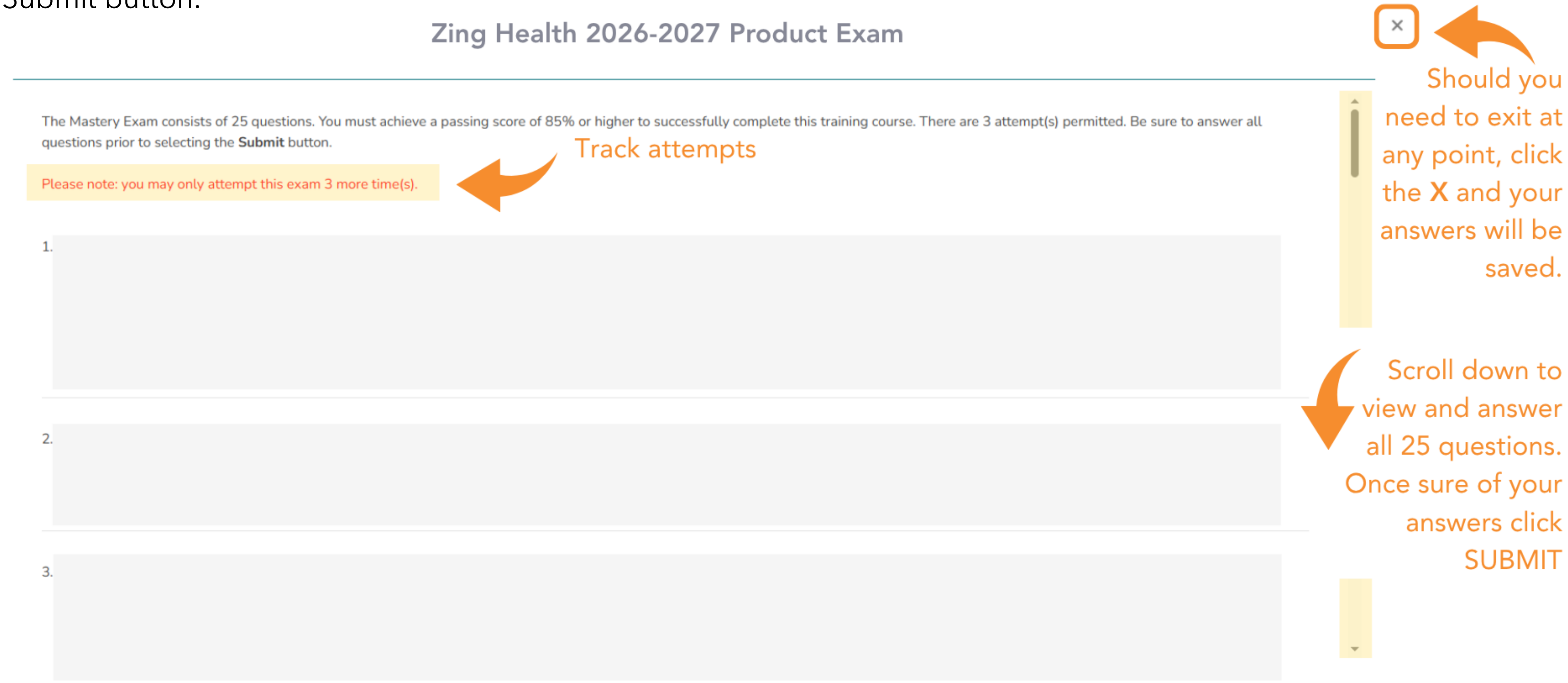
Recertification: Advance to Exam

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.



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.



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%**

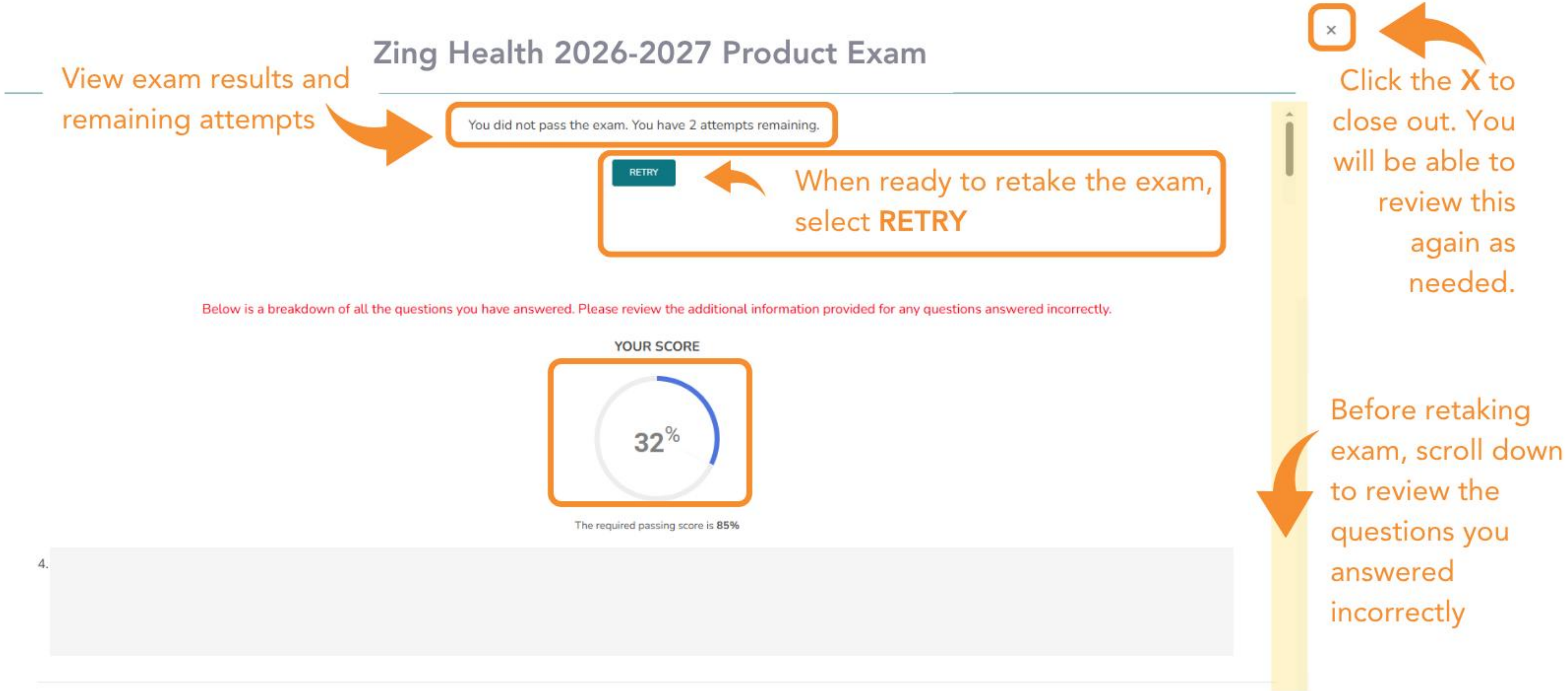
×

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

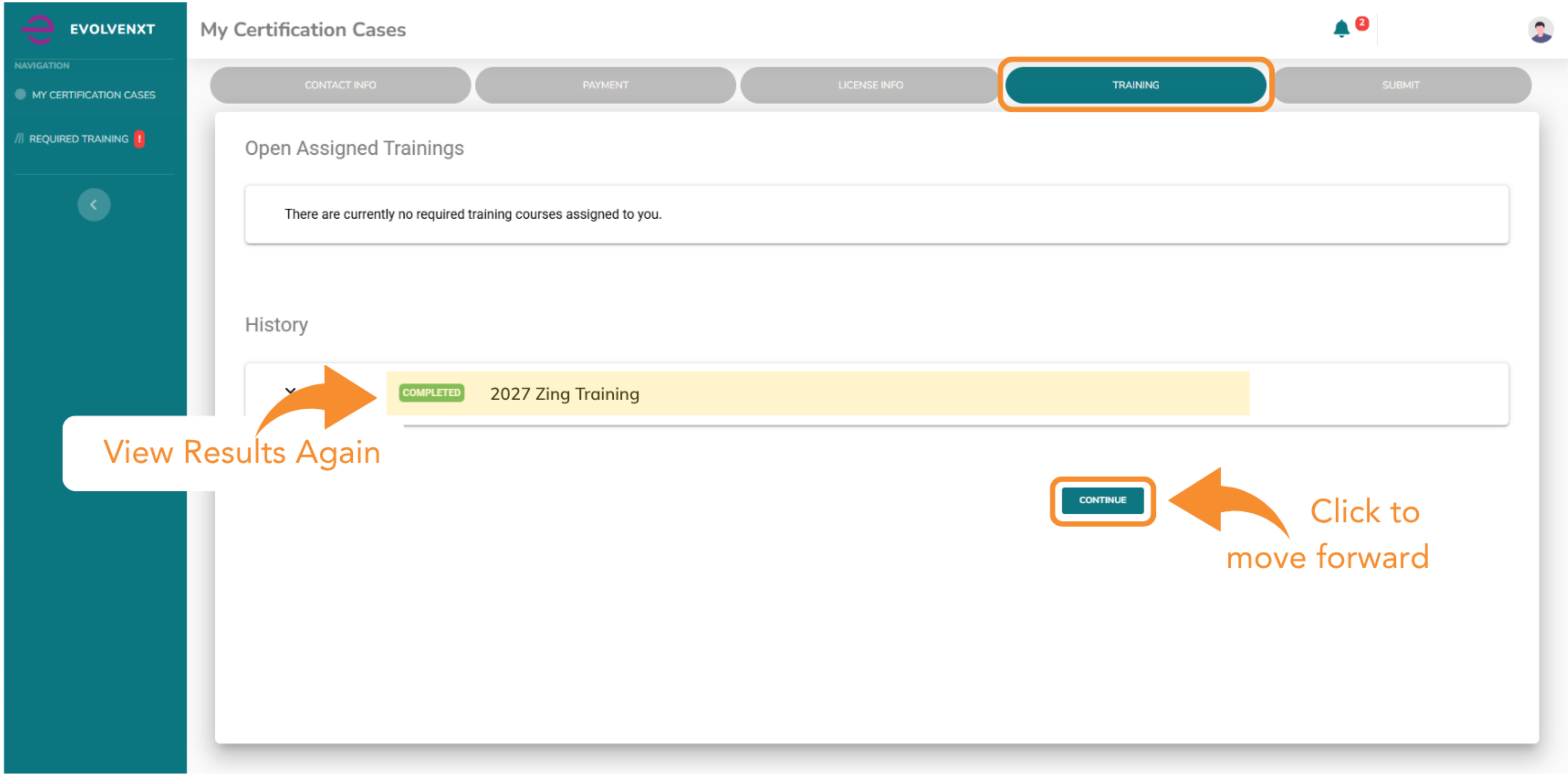
Recertification: Exam Results - Failed

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.



Recertification: Assigned Training Complete

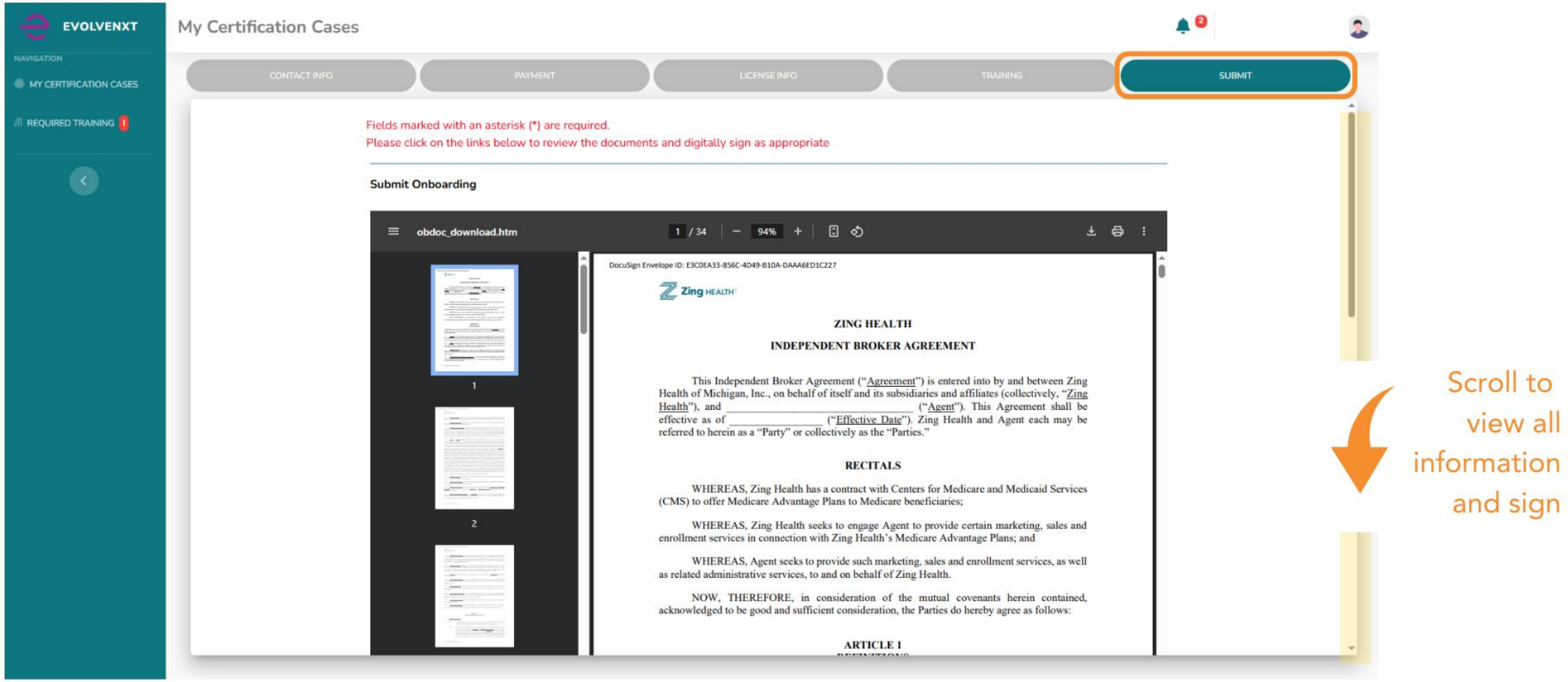
If a certificate of completion is needed, please take a screenshot. A downloadable certificate is not provided.



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.



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

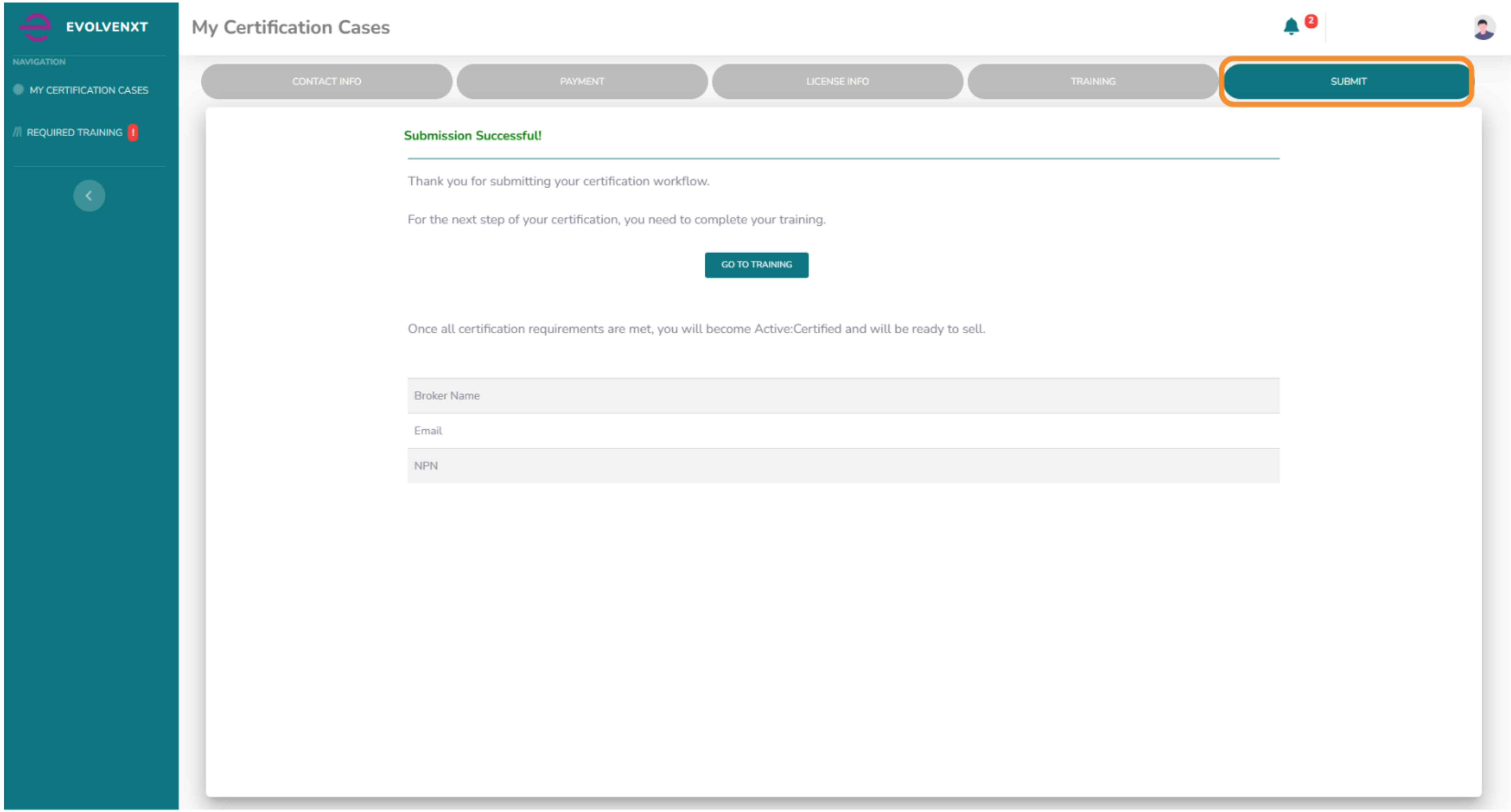
Please sign your name in the space below.

CLEAR

Click to SUBMIT

SUBMIT

Recertification: Submission Successful



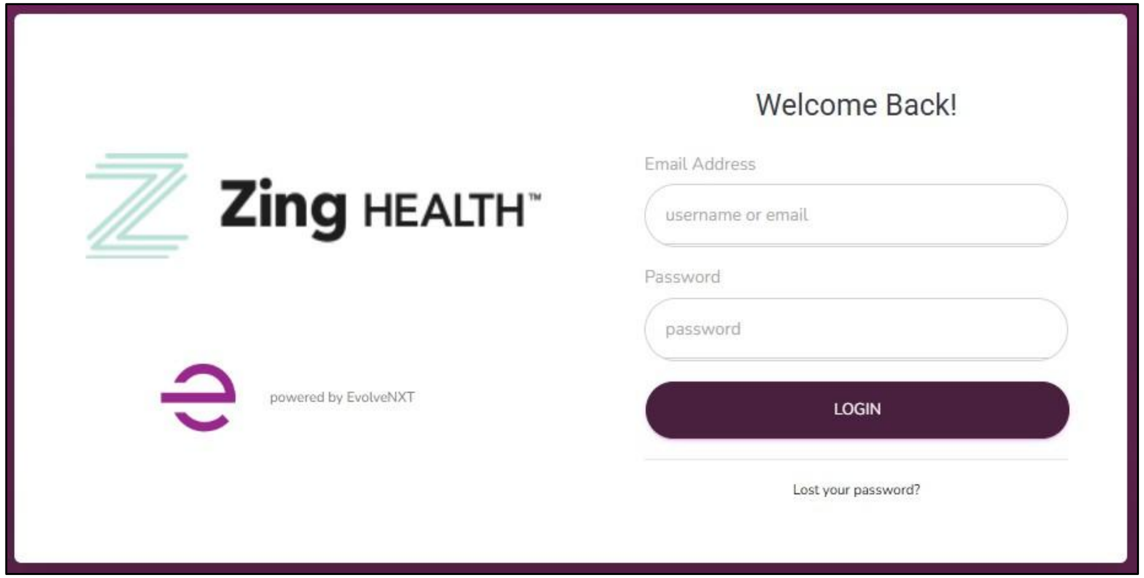
Broker Portal

- 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 (evolvenxt.com).

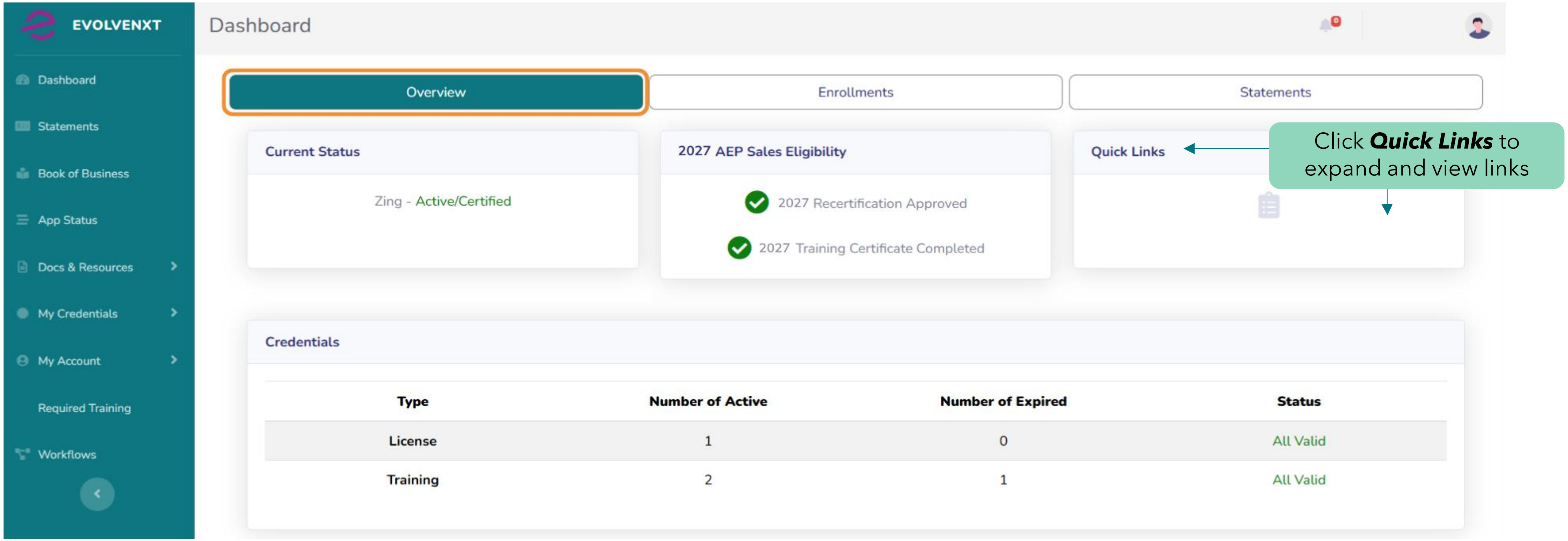


View may vary based on your representative type.

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.



View may vary based on your representative type.

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

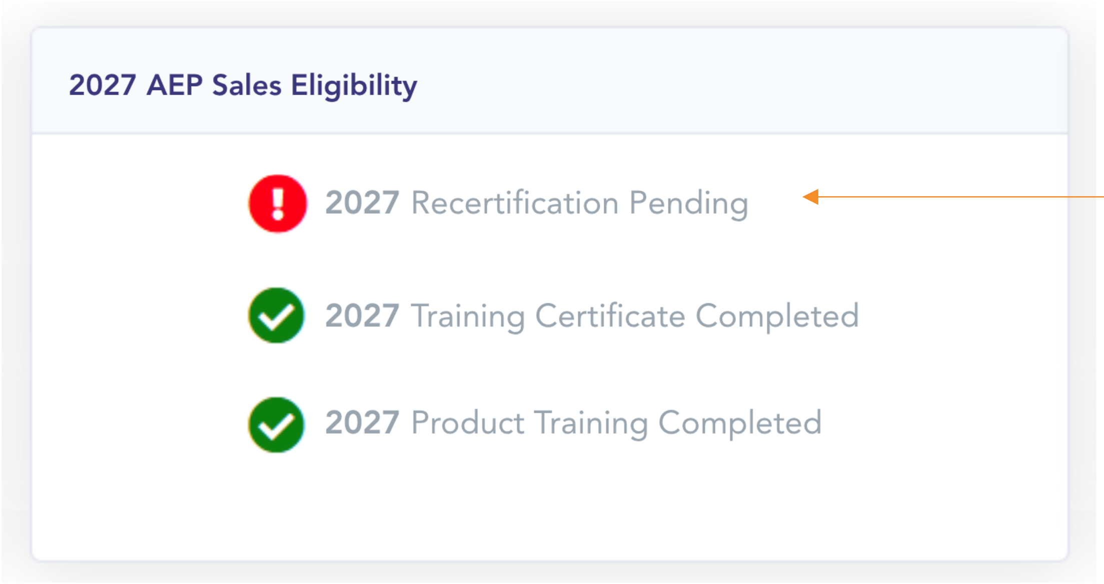
Complete Product Training

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 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.

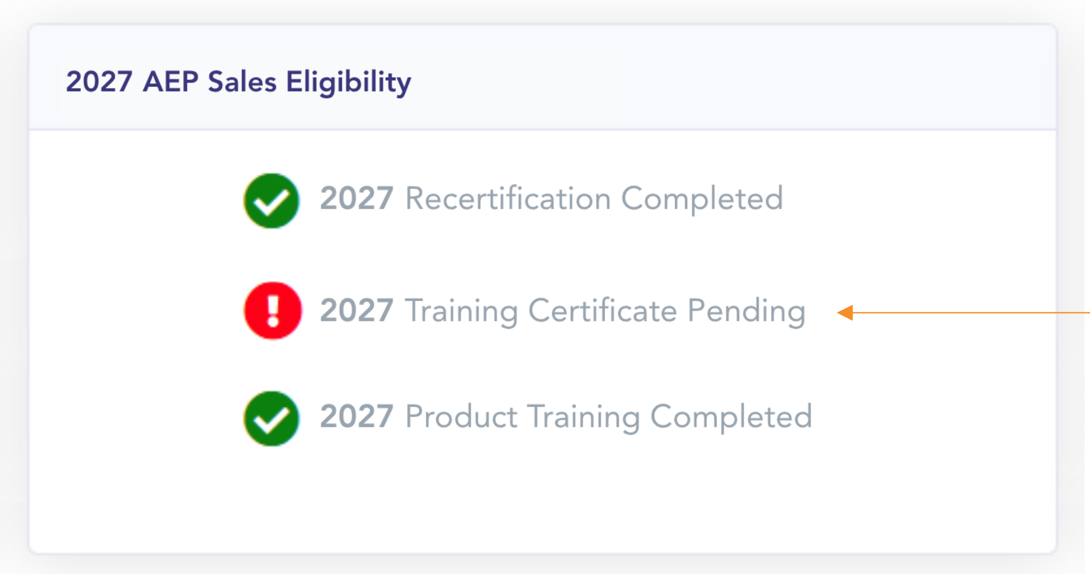
1 Complete Assigned Case

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 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***

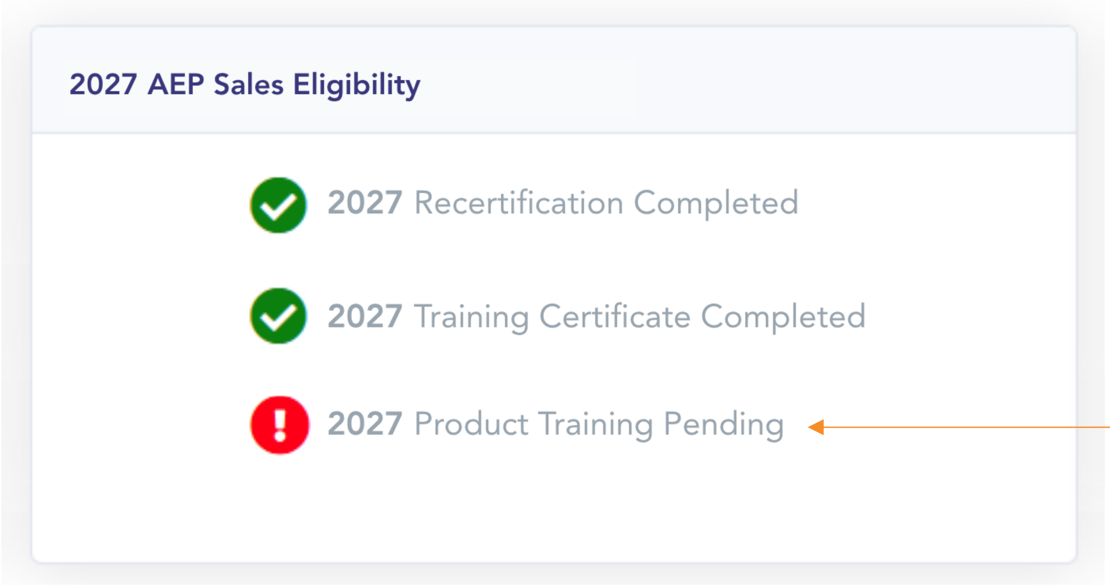
1 Complete Assigned Case

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 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

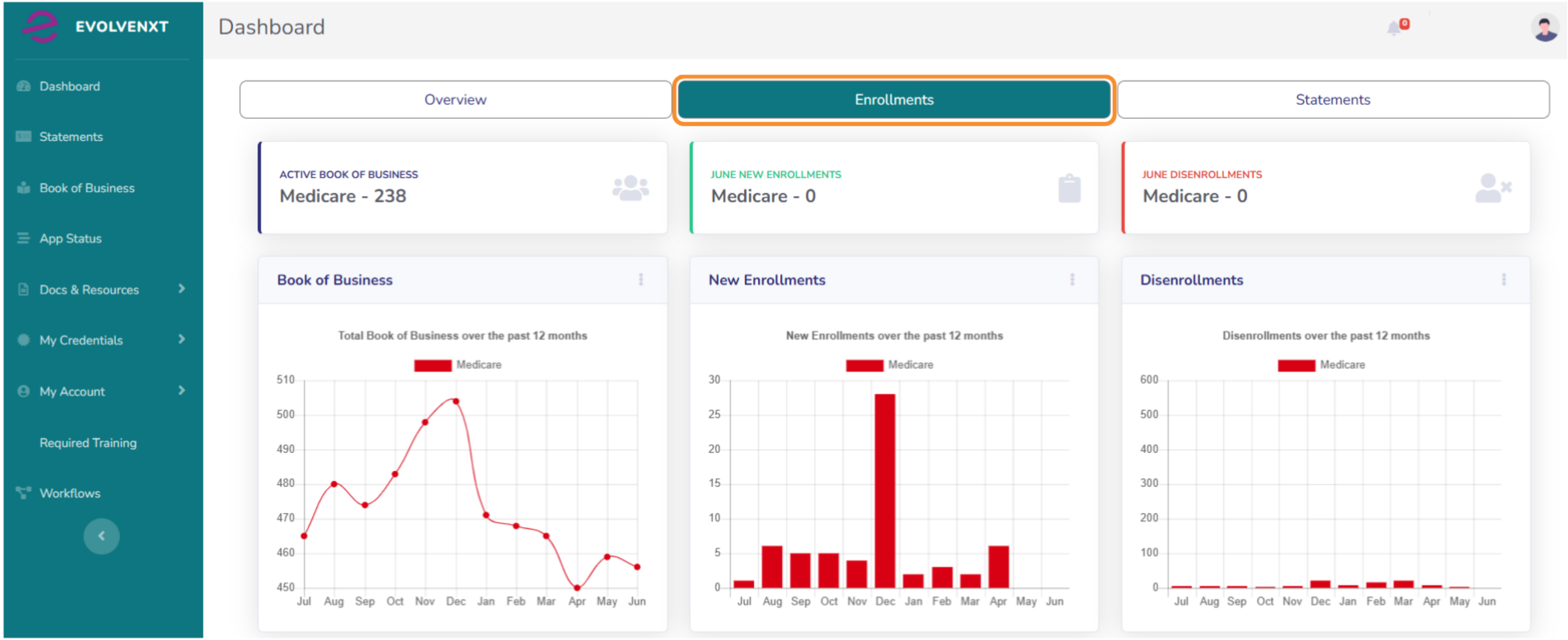
Use the broker portal dashboard as your quick status check before selling Zing Health plans.

2027 AEP Sales Eligibility

- 2027 Recertification Approved → **Assigned Case Completed**
- 2027 Training Certificate Completed → **AHIP Transmitted & Received**
- 2027 Product Training Completed → **Zing Training Completed**

Broker Portal: Dashboard - Enrollments

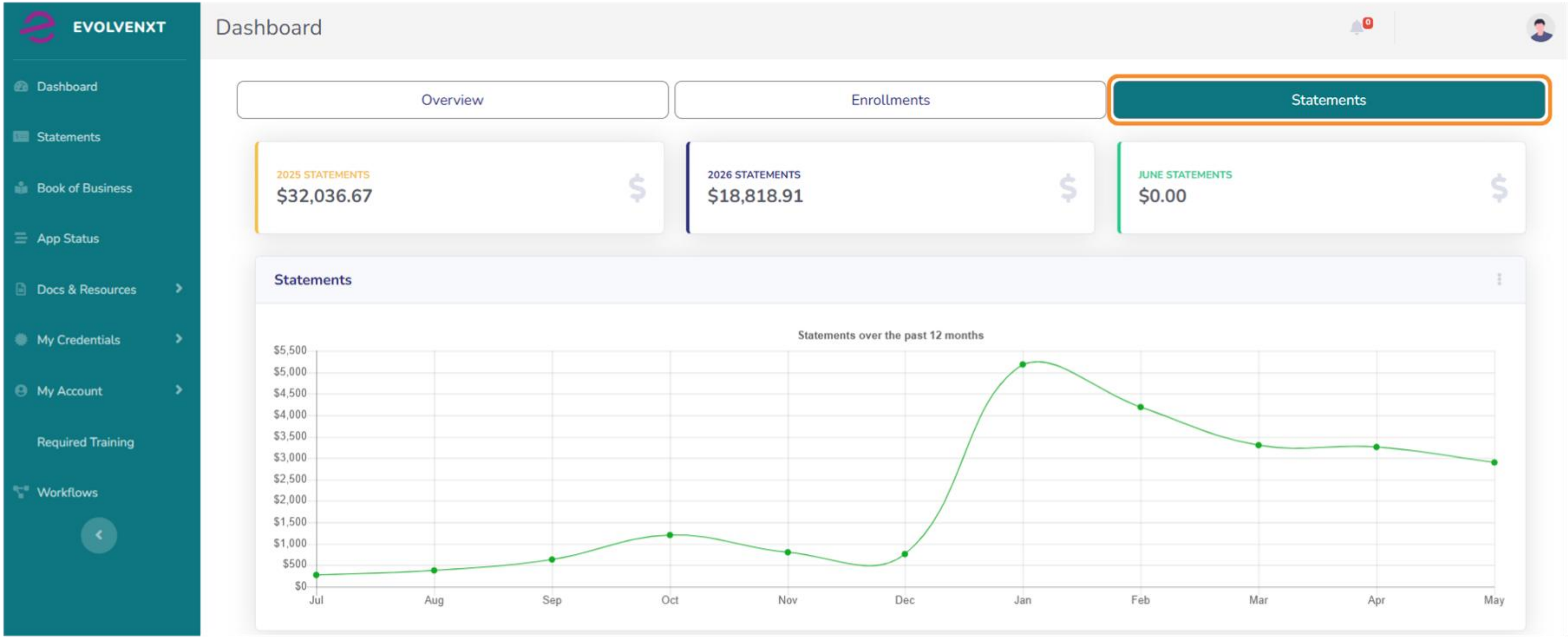
Enrollments is a summary view at your Active Book of Business, New Enrollments, and Disenrollments.



View may vary based on your representative type.

Broker Portal: Dashboard - Statements

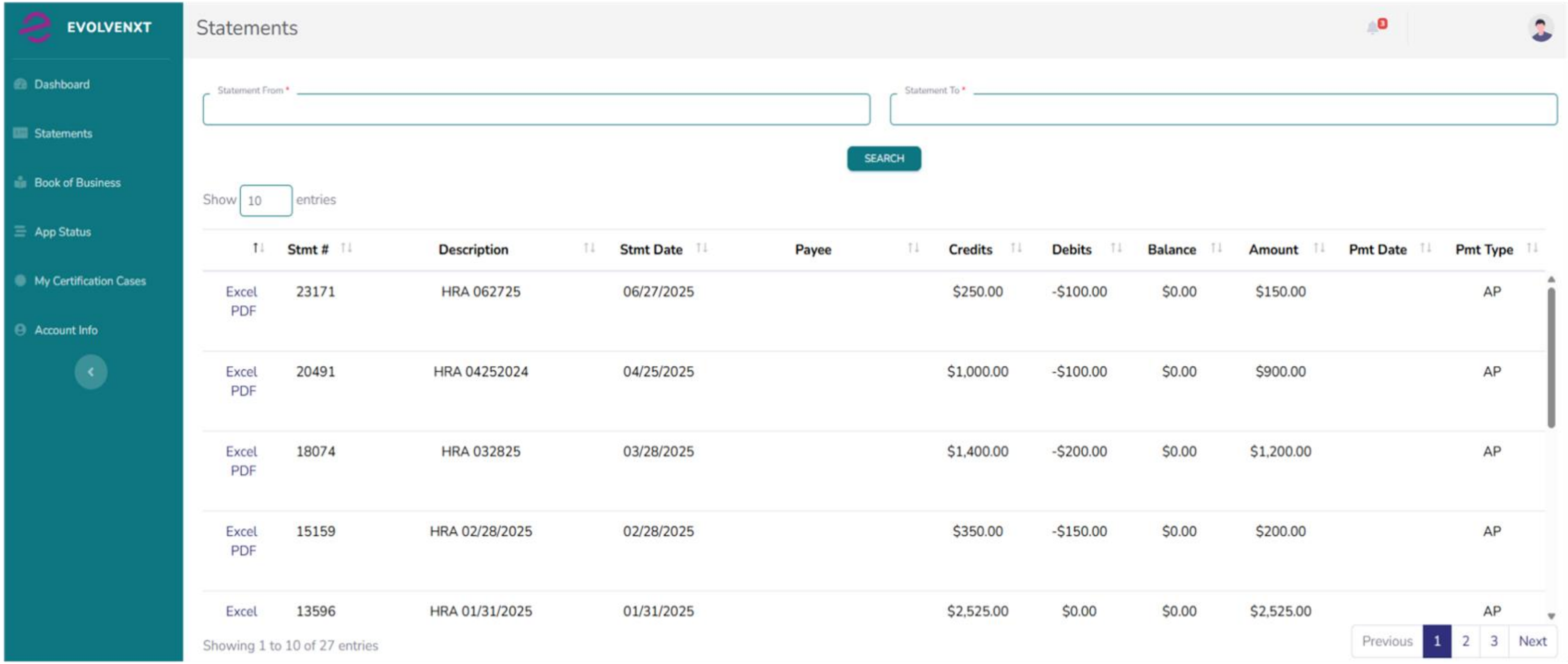
Statements is a summary view of your prior year statements, current year statements, and current month statements.



View may vary based on your representative type.

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.



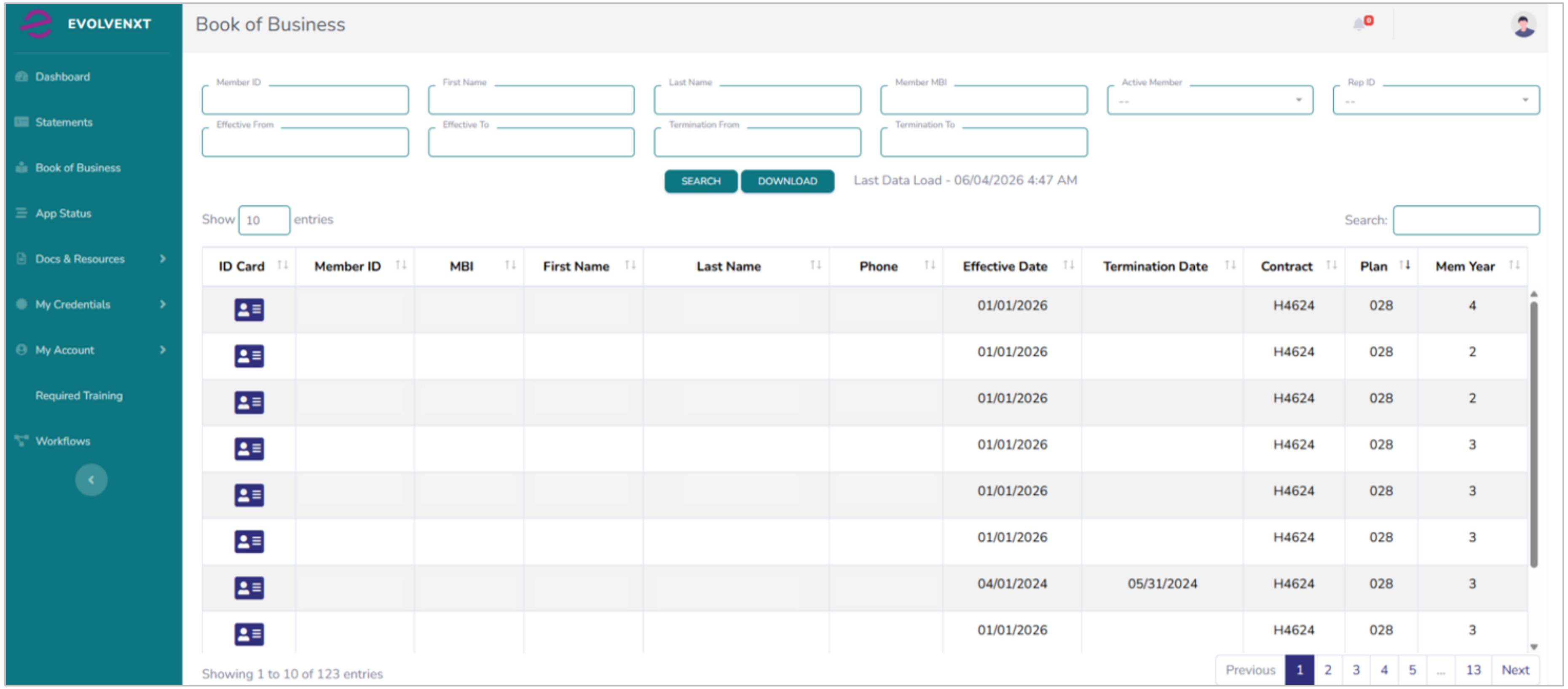
View may vary based on your representative type.

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.



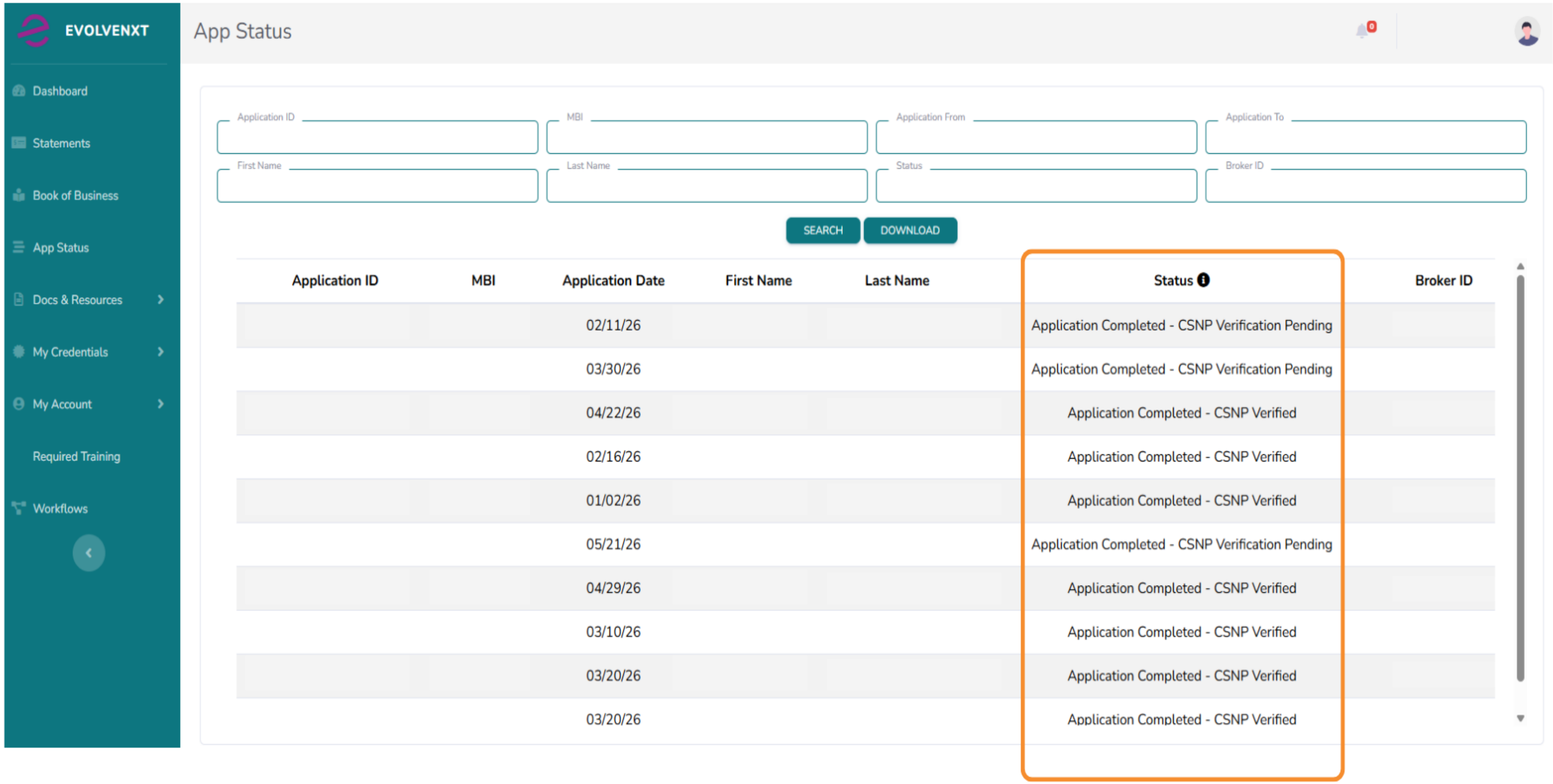
View may vary based on your representative type.

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.



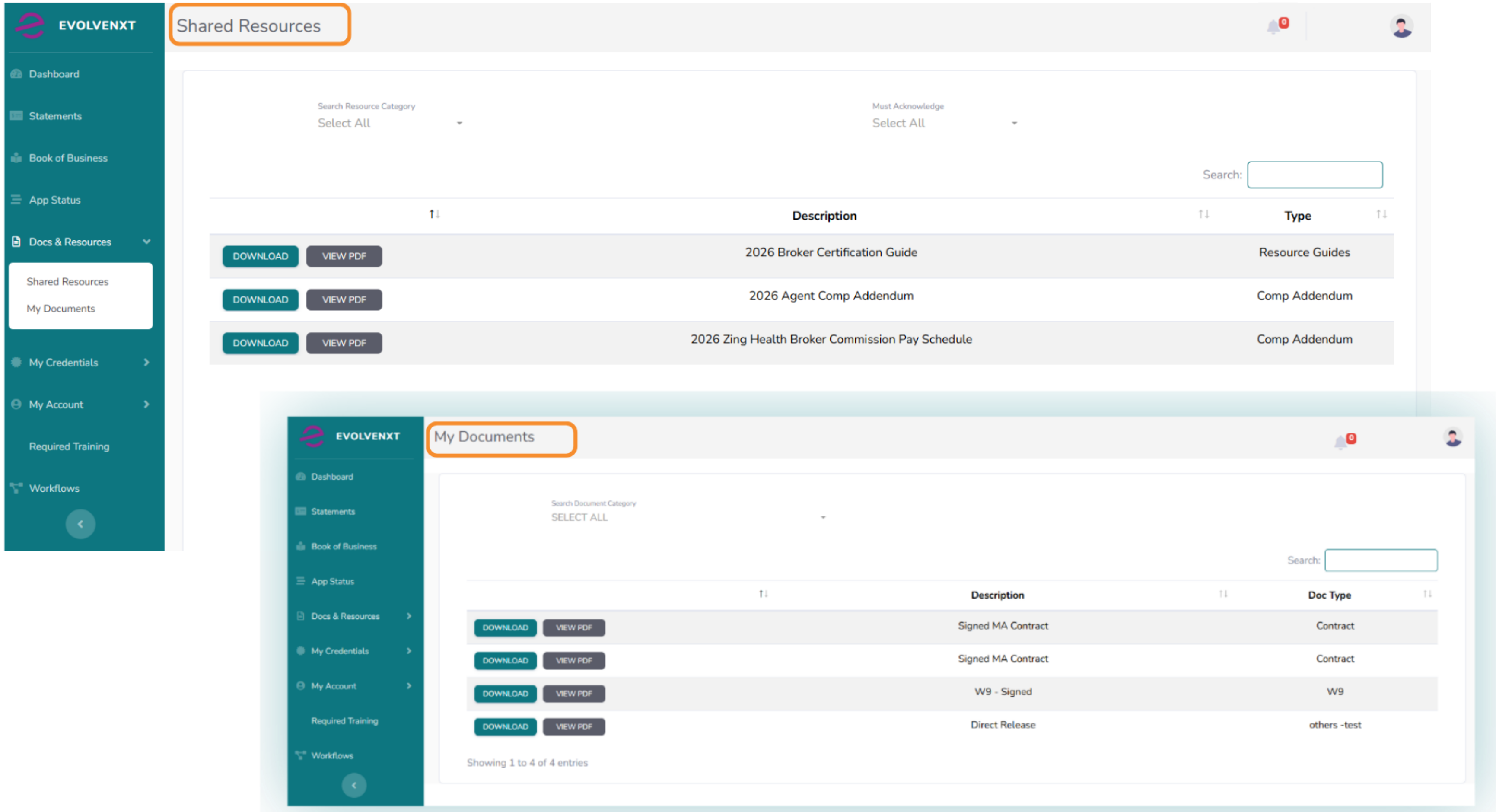
View may vary based on your representative type.

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.

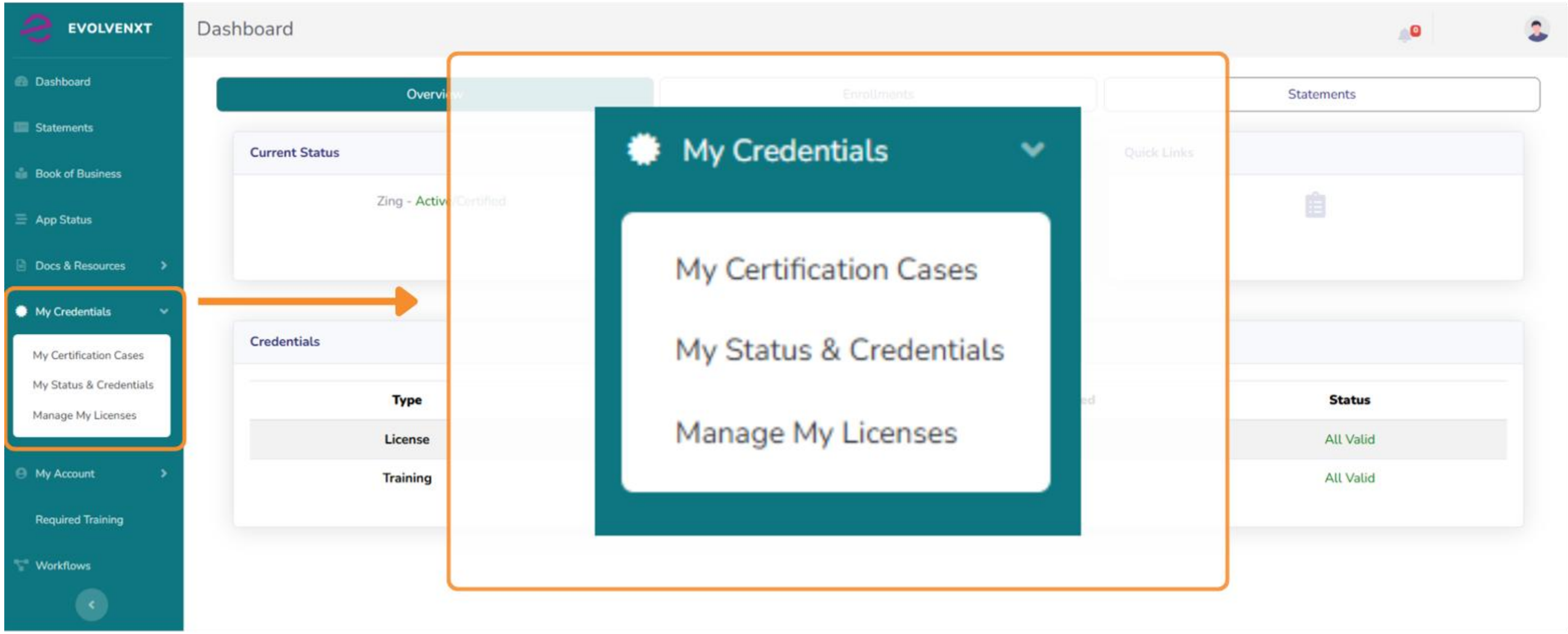


View may vary based on your representative type.

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.

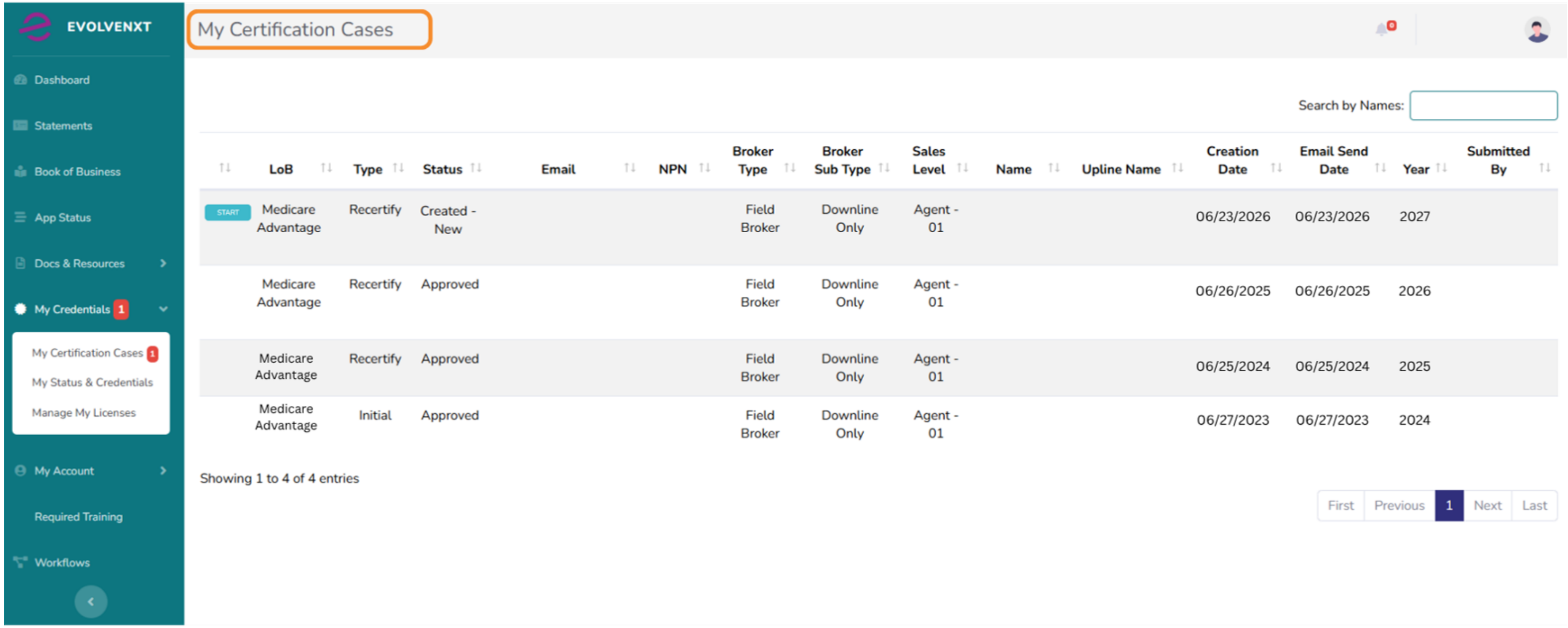


View may vary based on your representative type.

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.

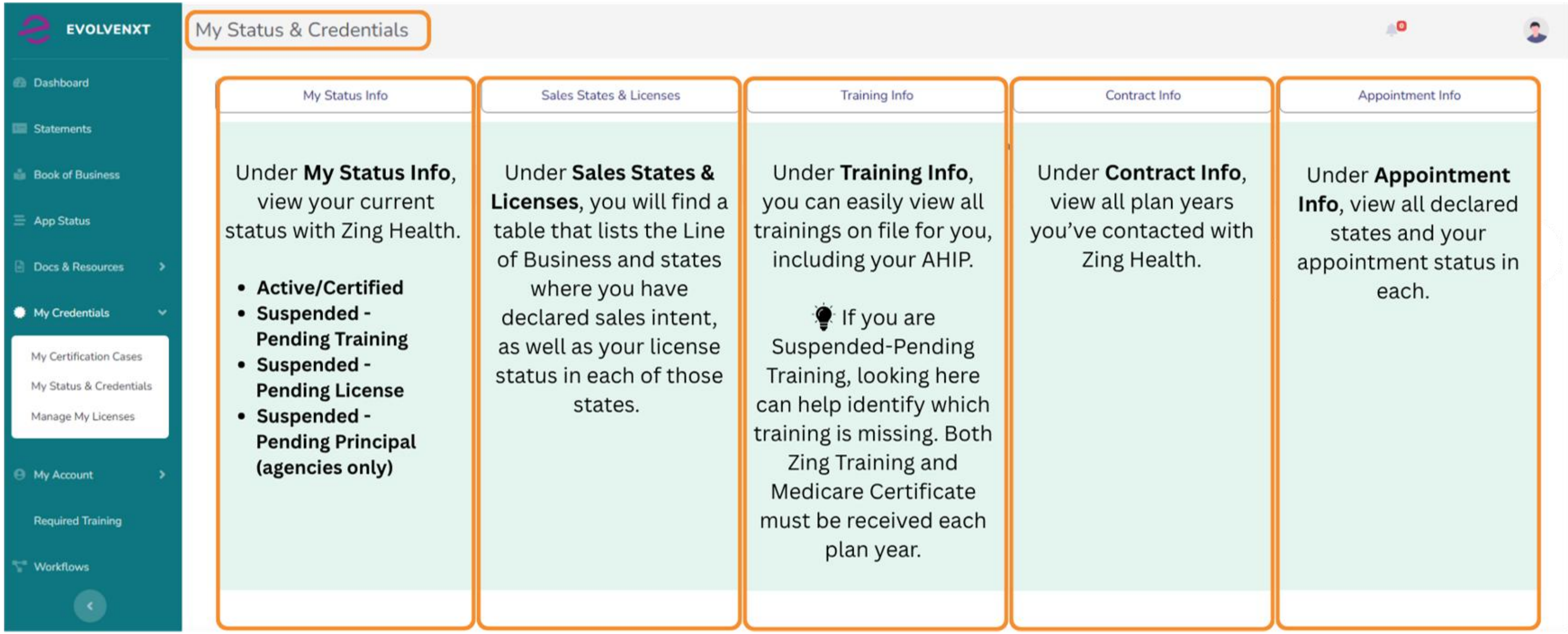


	LoB	Type	Status	Email	NPN	Broker Type	Broker Sub Type	Sales Level	Name	Upline Name	Creation Date	Email Send Date	Year	Submitted By
START	Medicare Advantage	Recertify	Created - New			Field Broker	Downline Only	Agent - 01			06/23/2026	06/23/2026	2027	
	Medicare Advantage	Recertify	Approved			Field Broker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

View may vary based on your representative type.

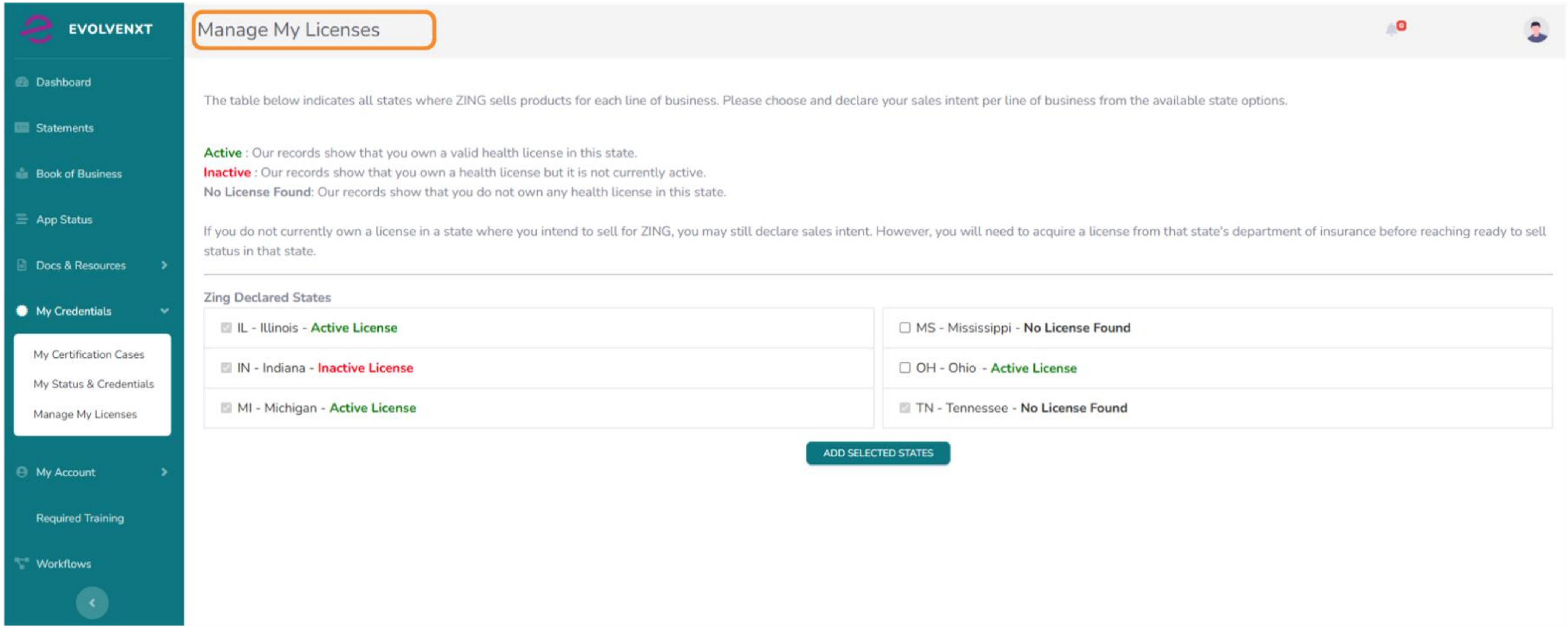
Broker Portal: My Credentials – My Status & Credentials

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.



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.

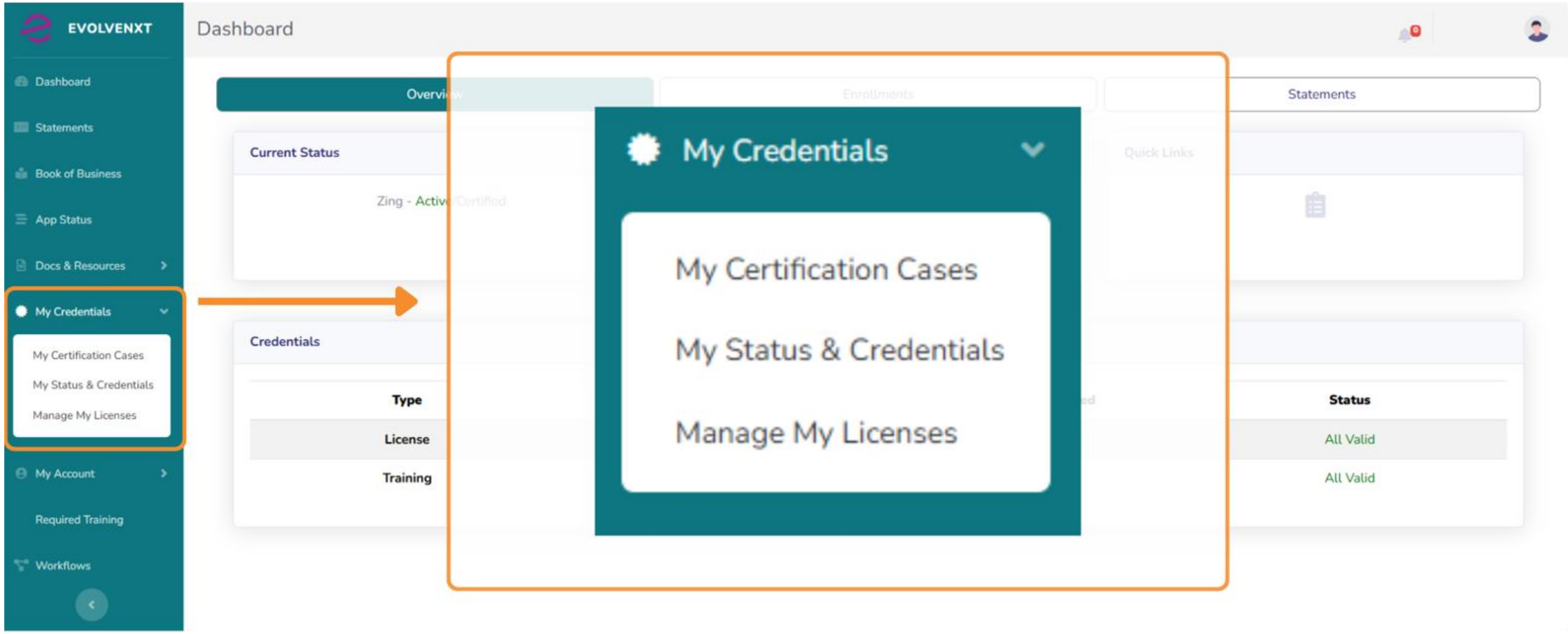


View may vary based on your representative type.

Broker Portal: My Account

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

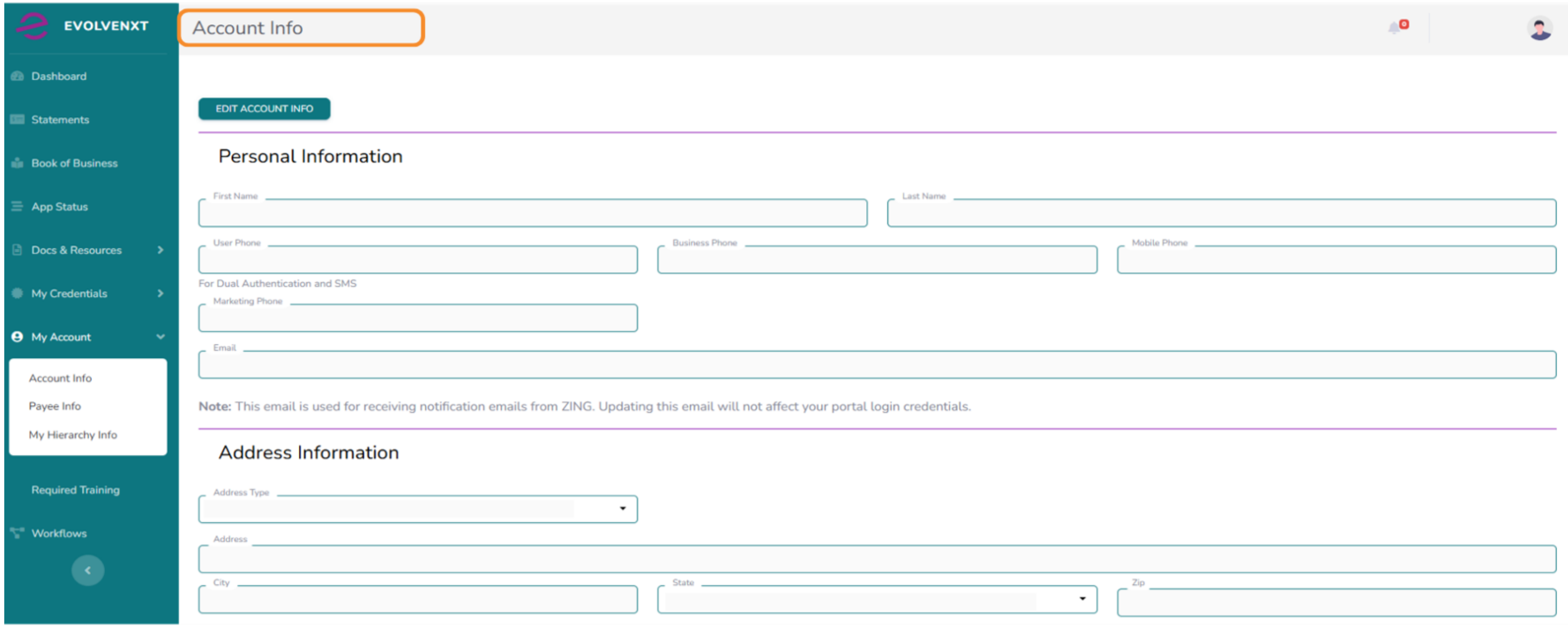
Each section houses very important information you will need access to during your partnership with the health plan.



View may vary based on your representative type.

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.

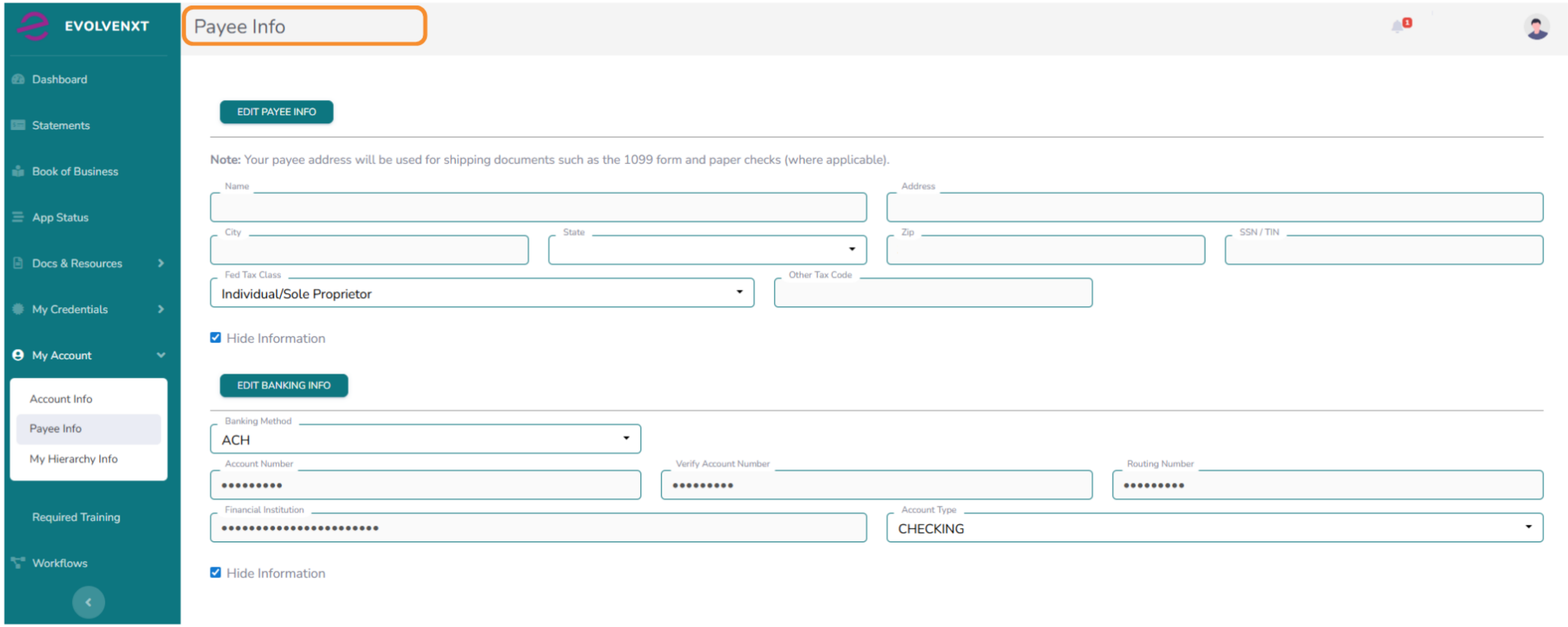


View may vary based on your representative type.

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.

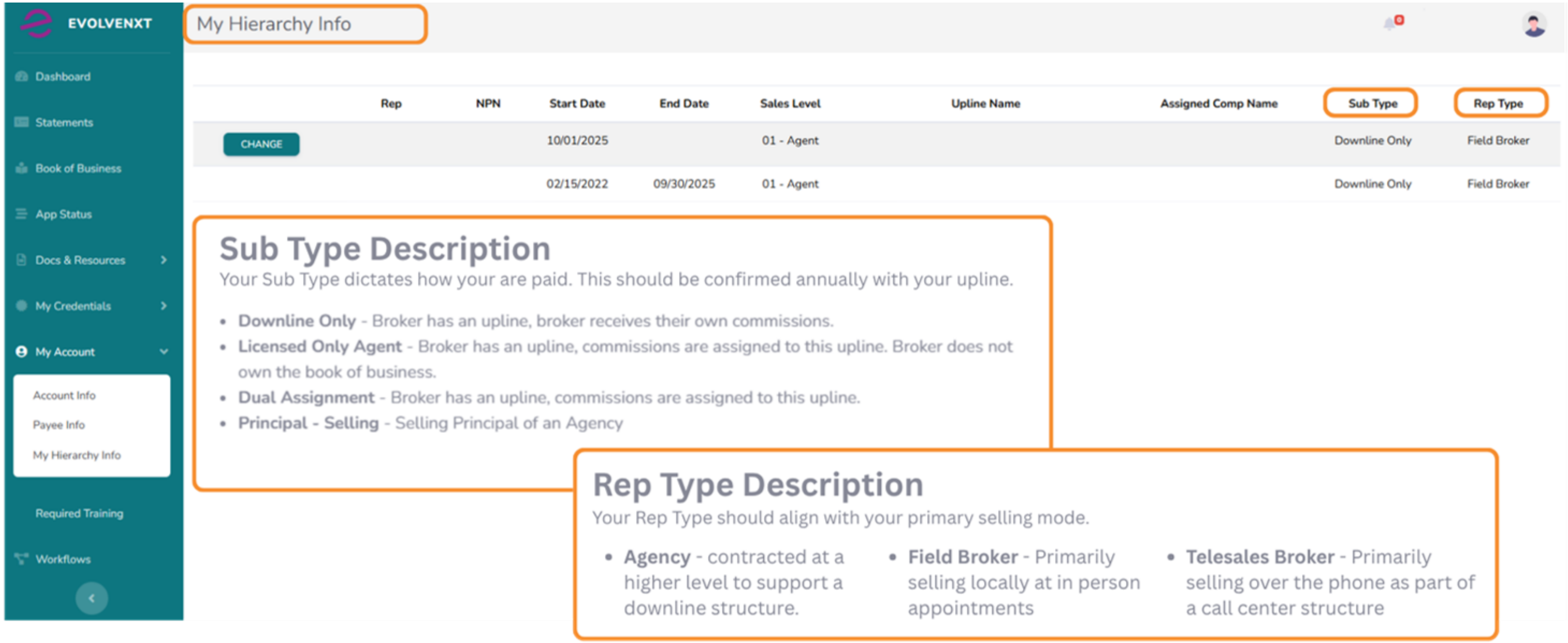
For Dual Assignment or Licensed Only agents, adding payee information in the portal will not update the current payment setup. These agents should work directly with their upline if banking or payment changes are needed.



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.

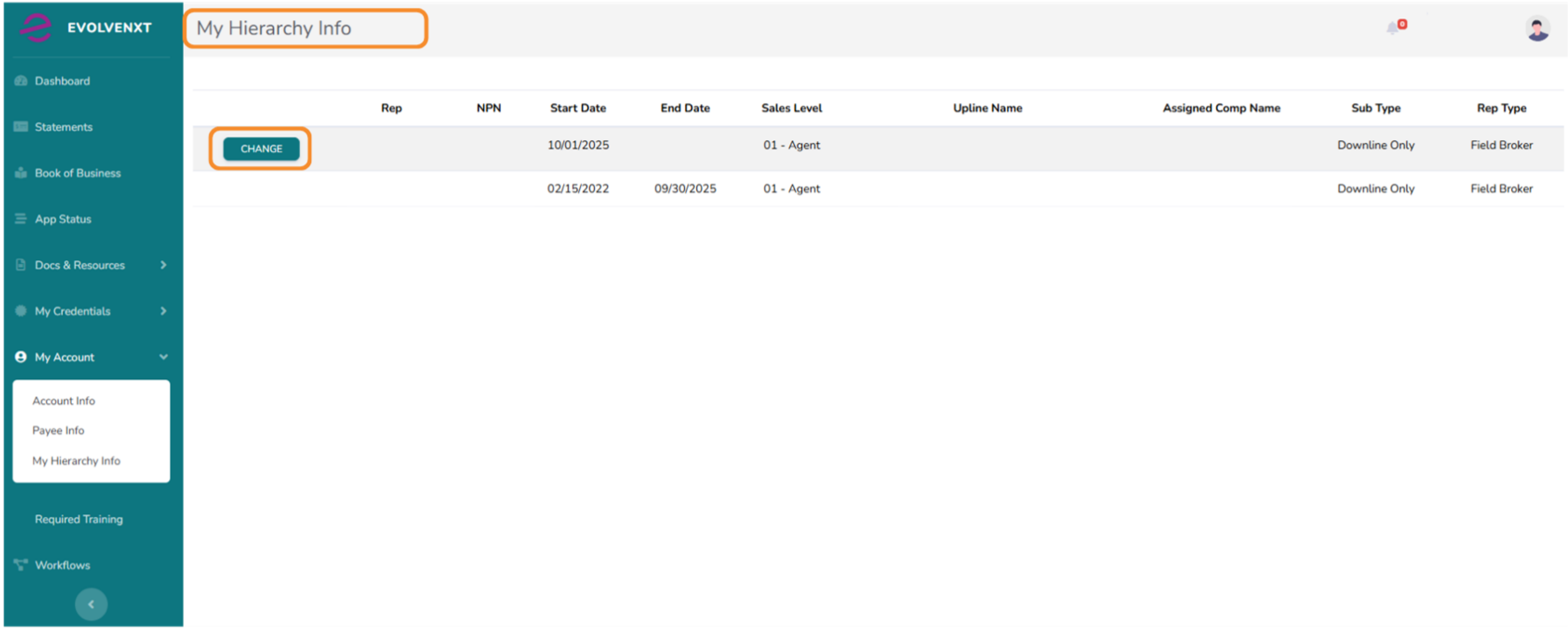
Agents should review this information annually and contact their upline or the health plan if anything appears incorrect.



View may vary based on your representative type.

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.



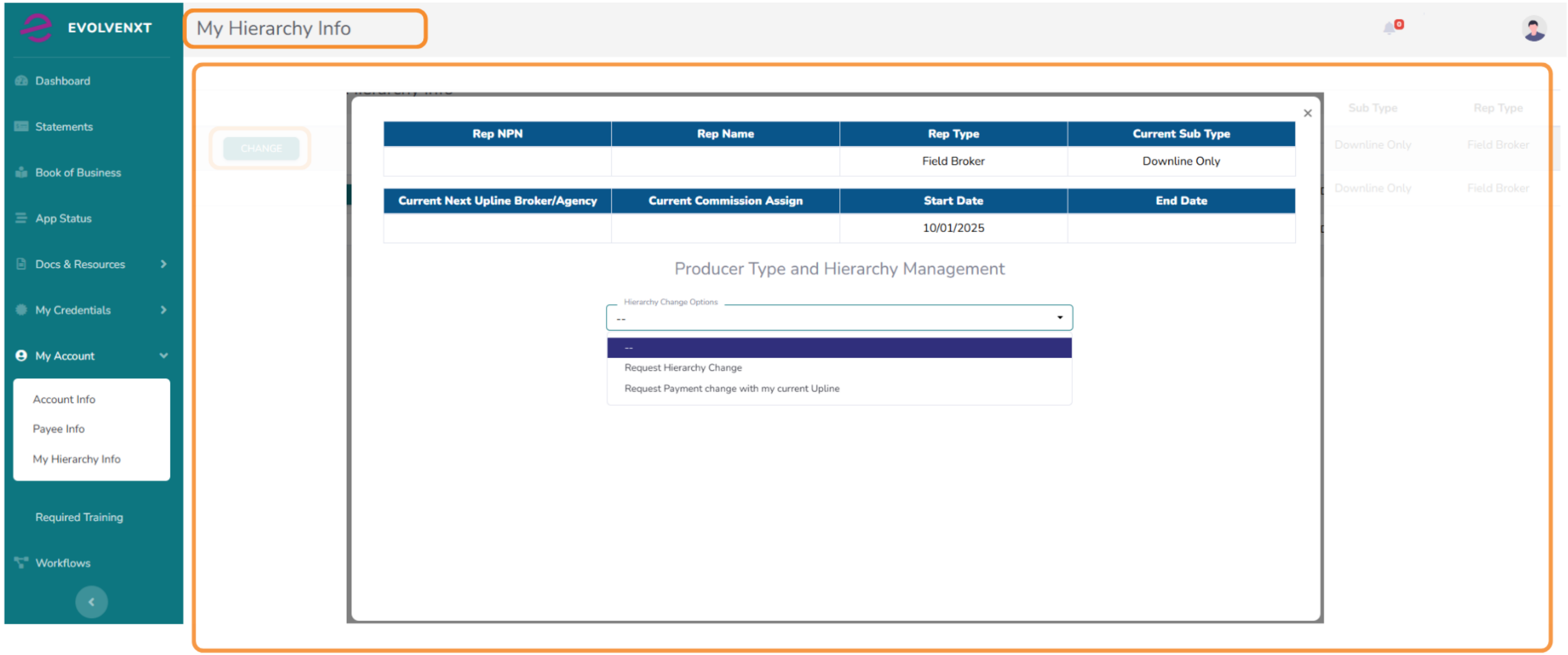
View may vary based on your representative type.

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.

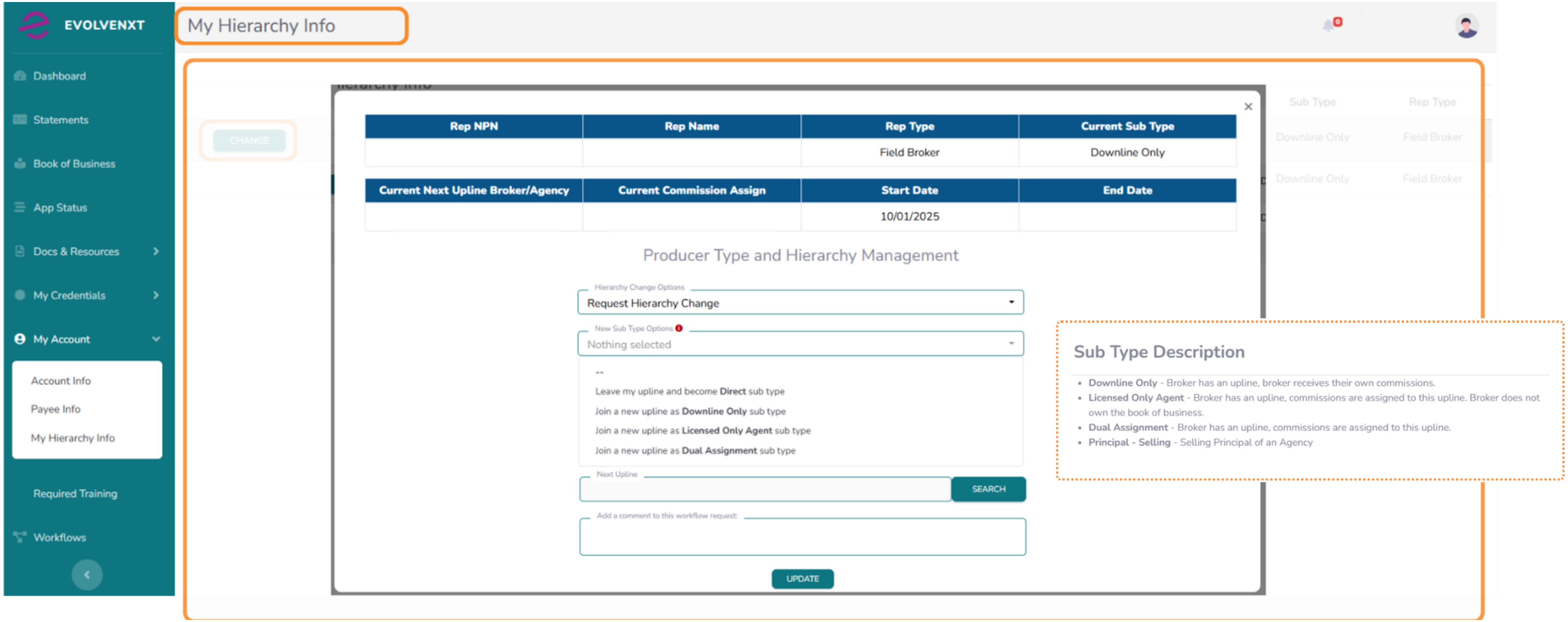
Hierarchy Change should be used when requesting a change to upline affiliation.

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



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

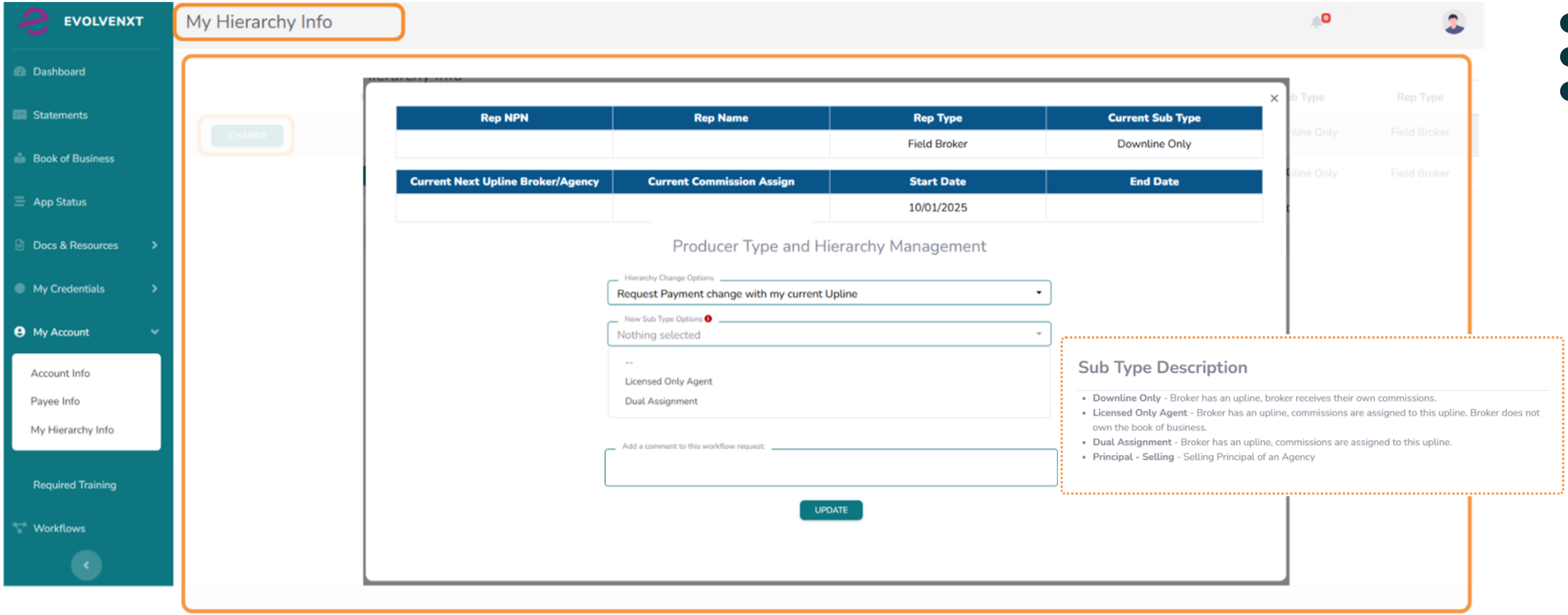
To request a **Hierarchy Change**, agents must select the **Sub Type** they would like under the new upline, then search for the new upline by **Agency Name** or **Agency NPN**. Agents should also include any applicable comments, such as whether they have a release on file or are requesting to move without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



View may vary based on your representative type.

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.

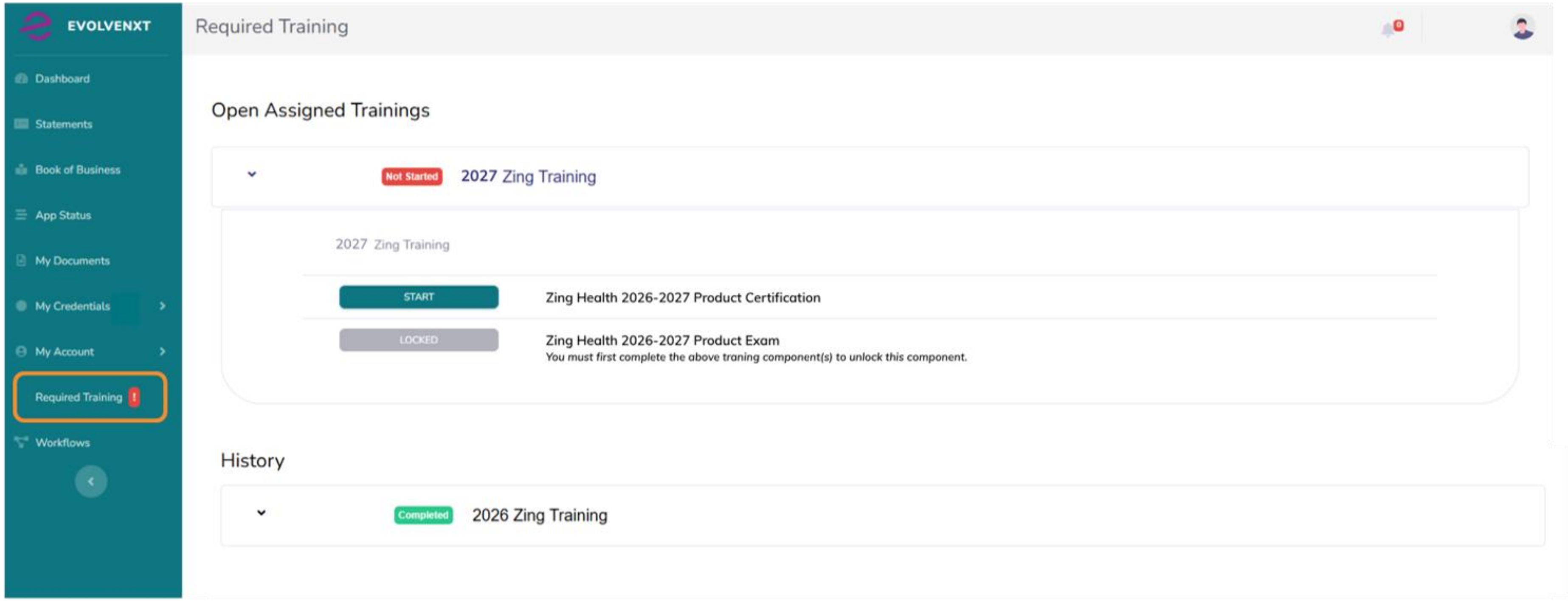


View may vary based on your representative type.

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.

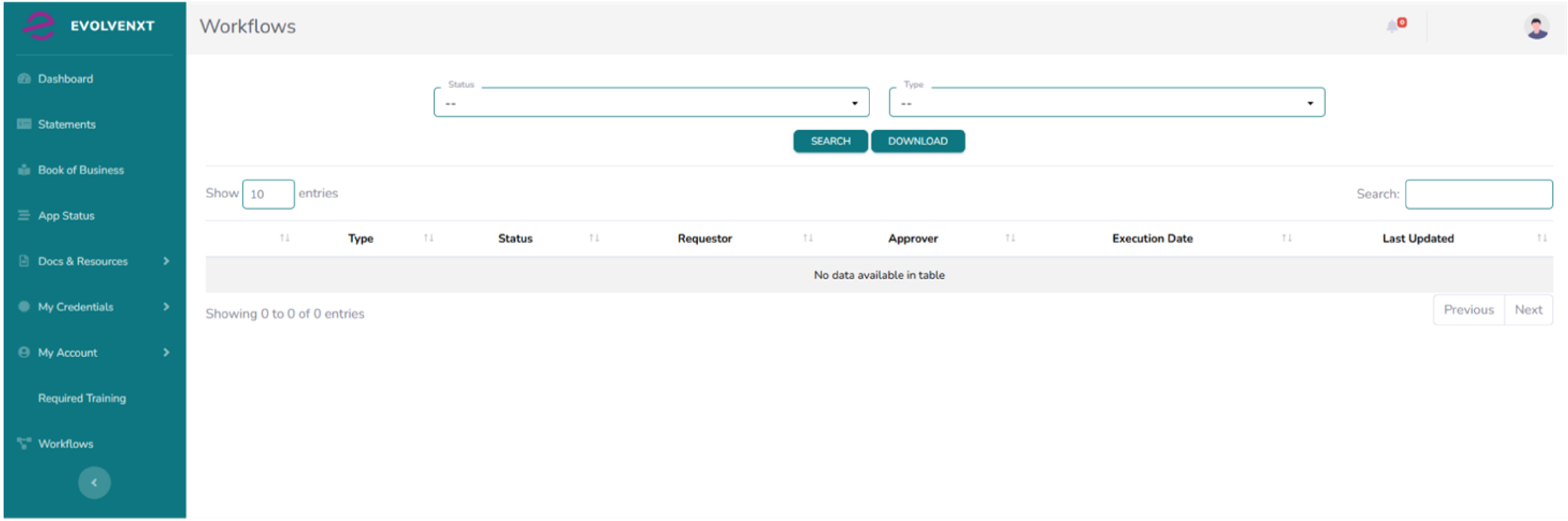


View may vary based on your representative type.

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.



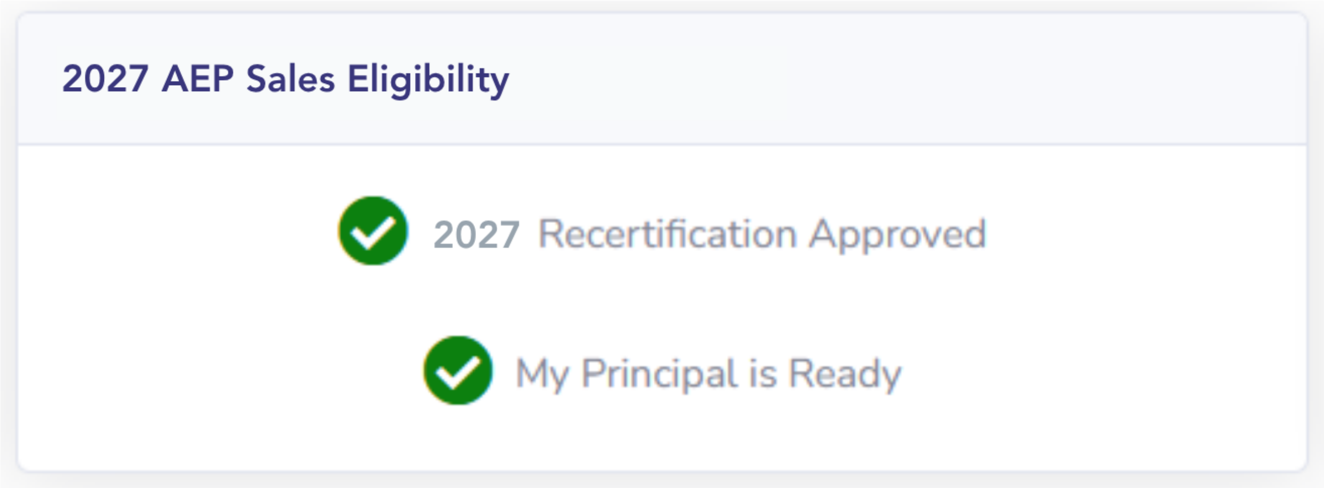
View may vary based on your representative type.

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.

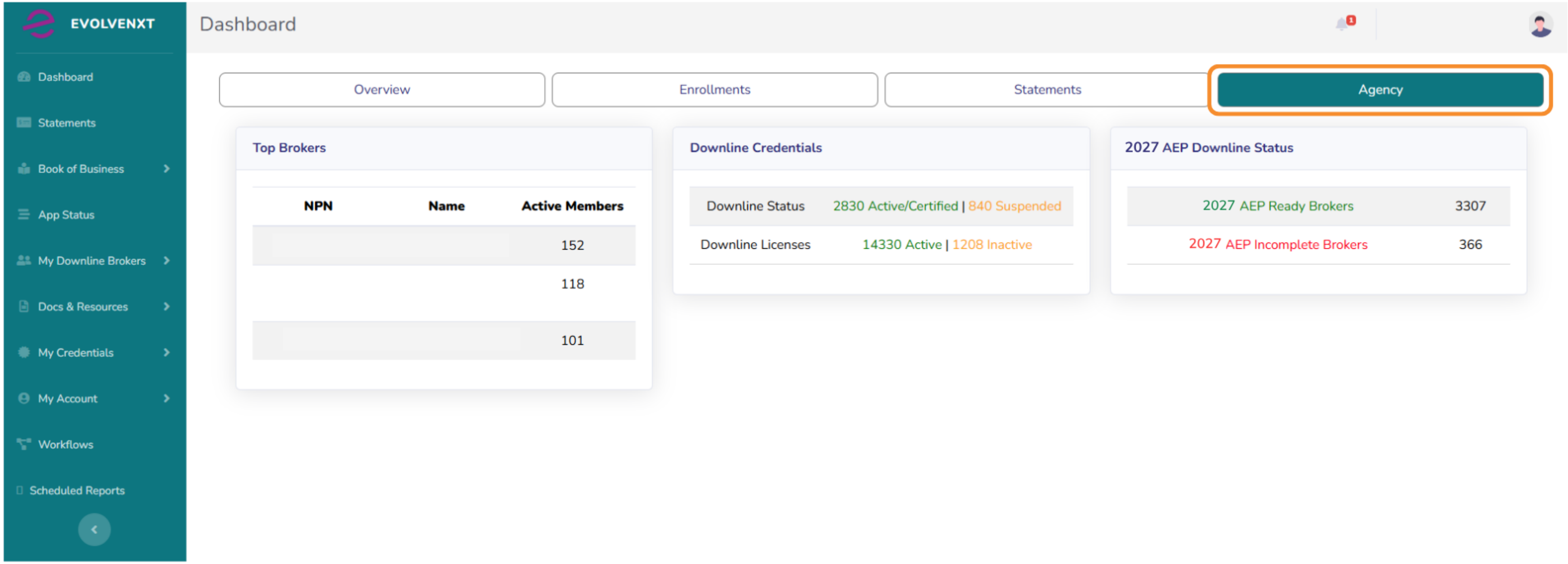


View may vary based on your representative type.

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.

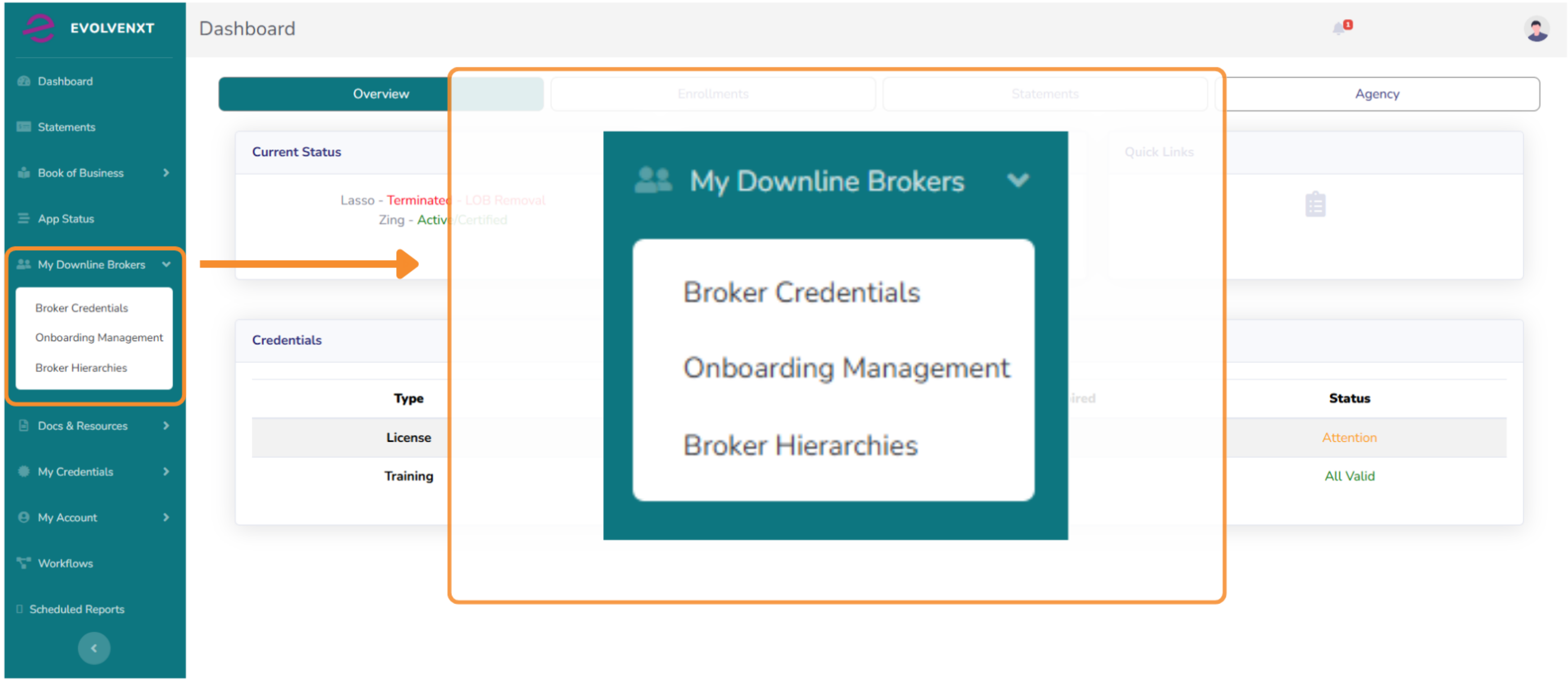


View may vary based on your representative type.

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.

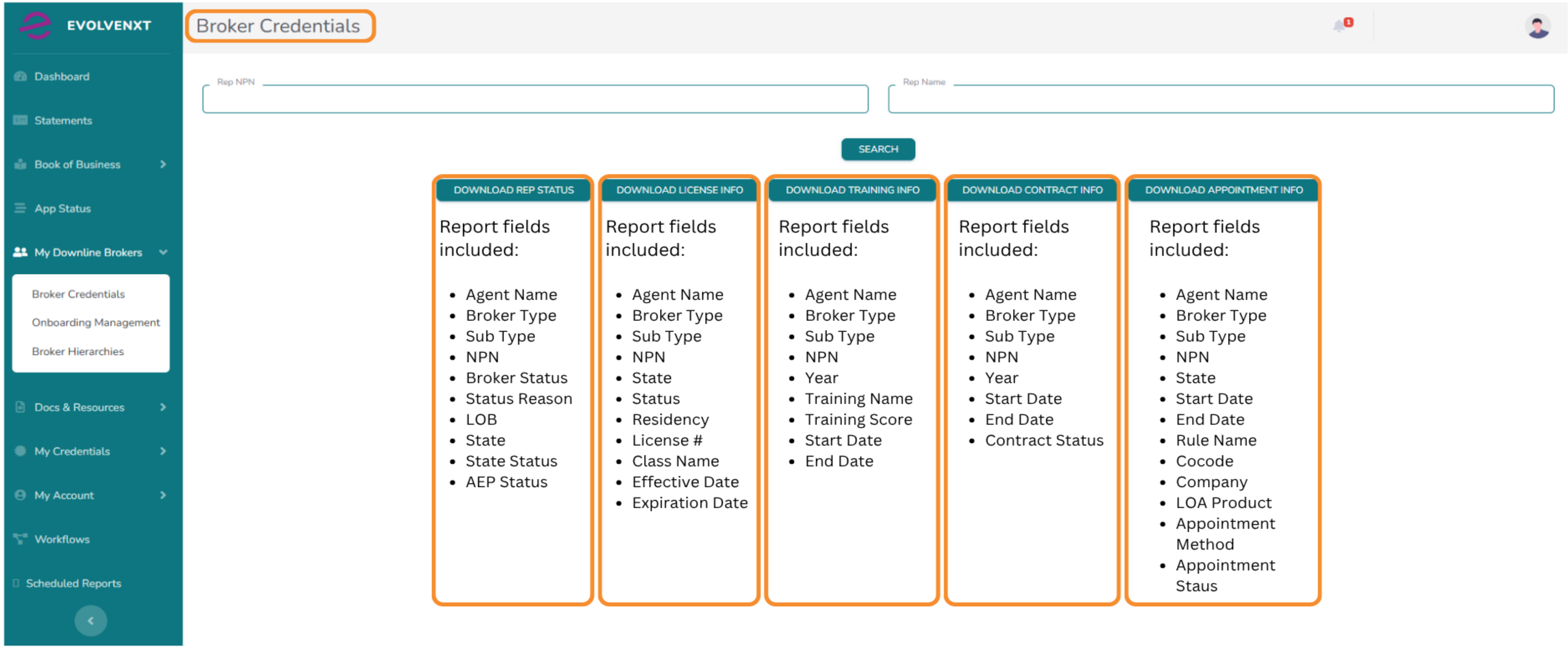


View may vary based on your representative type.

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.

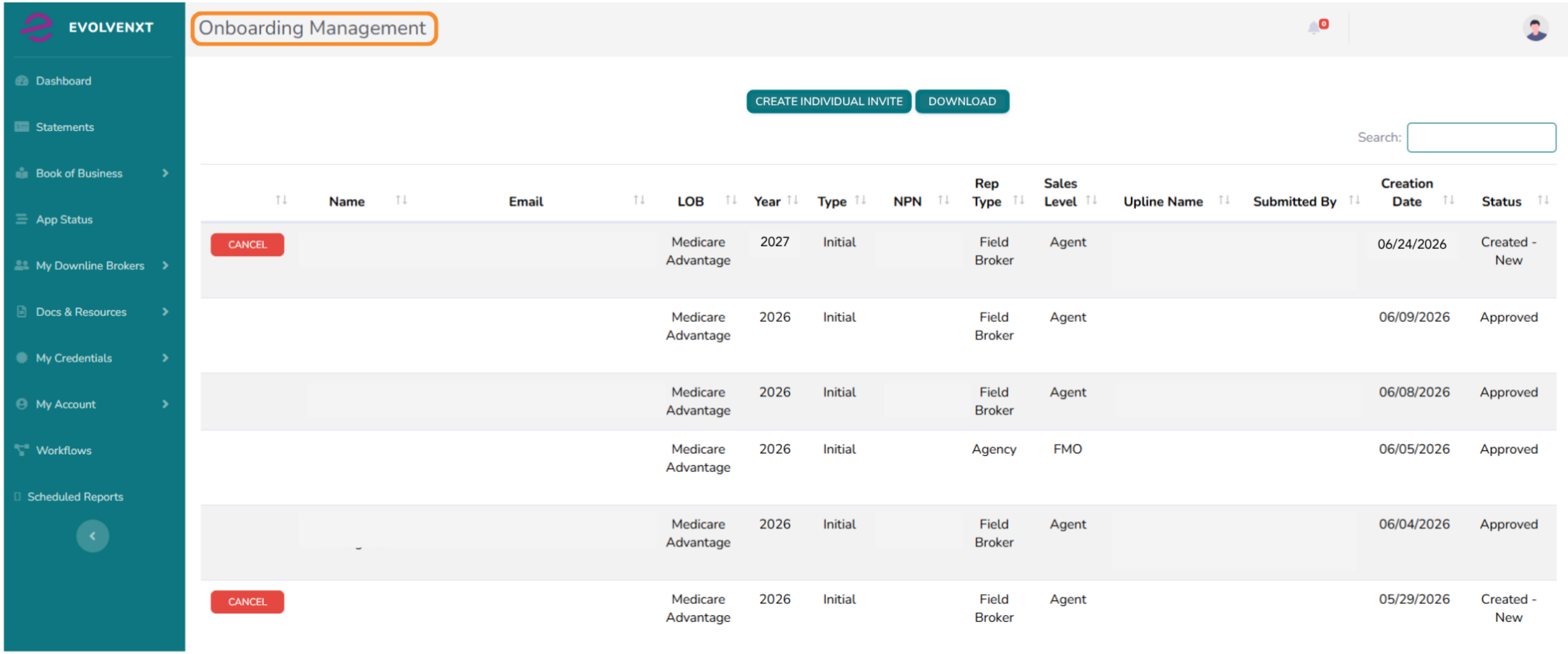


View may vary based on your representative type.

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.

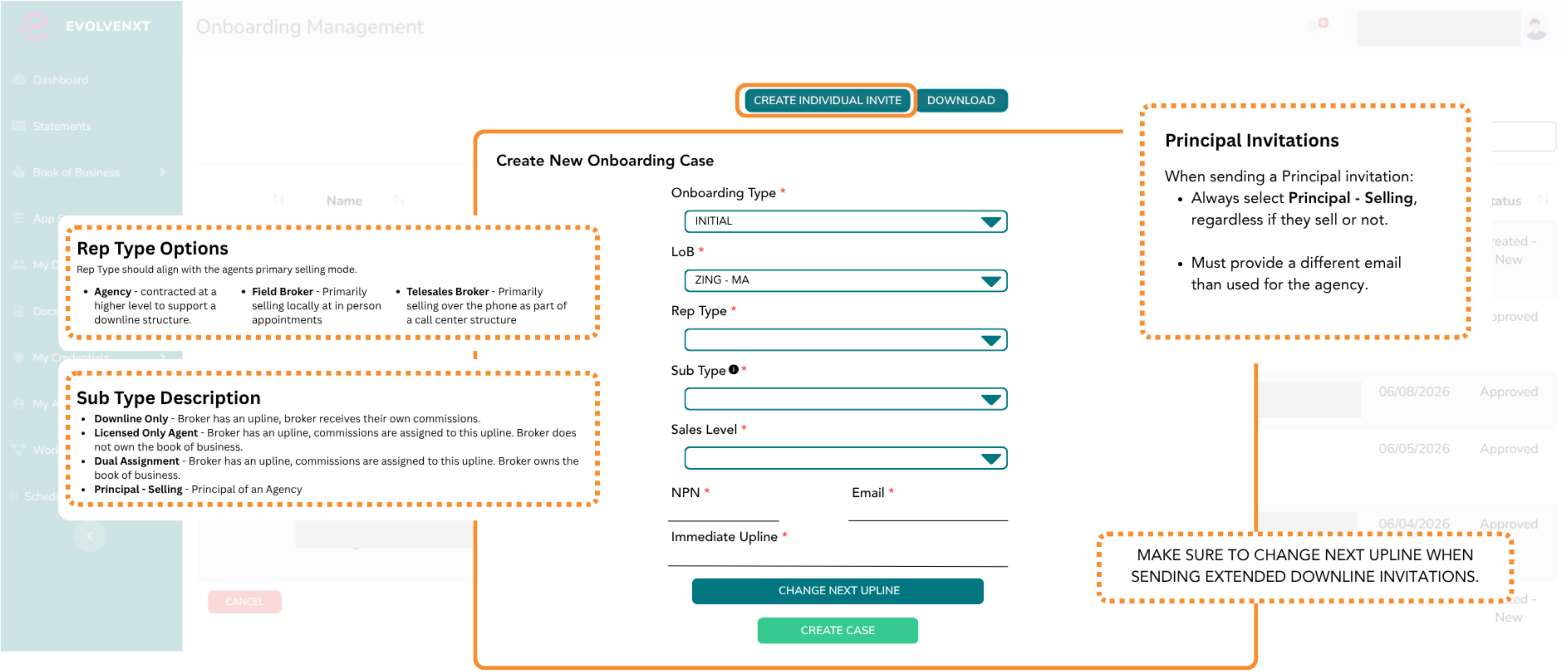


	Name	Email	LOB	Year	Type	NPN	Rep Type	Sales Level	Upline Name	Submitted By	Creation Date	Status
CANCEL			Medicare Advantage	2027	Initial		Field Broker	Agent			06/24/2026	Created - New
			Medicare Advantage	2026	Initial		Field Broker	Agent			06/09/2026	Approved
			Medicare Advantage	2026	Initial		Field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

View may vary based on your representative type.

Broker Portal: Agency - Onboarding Mgmt | Create Invite

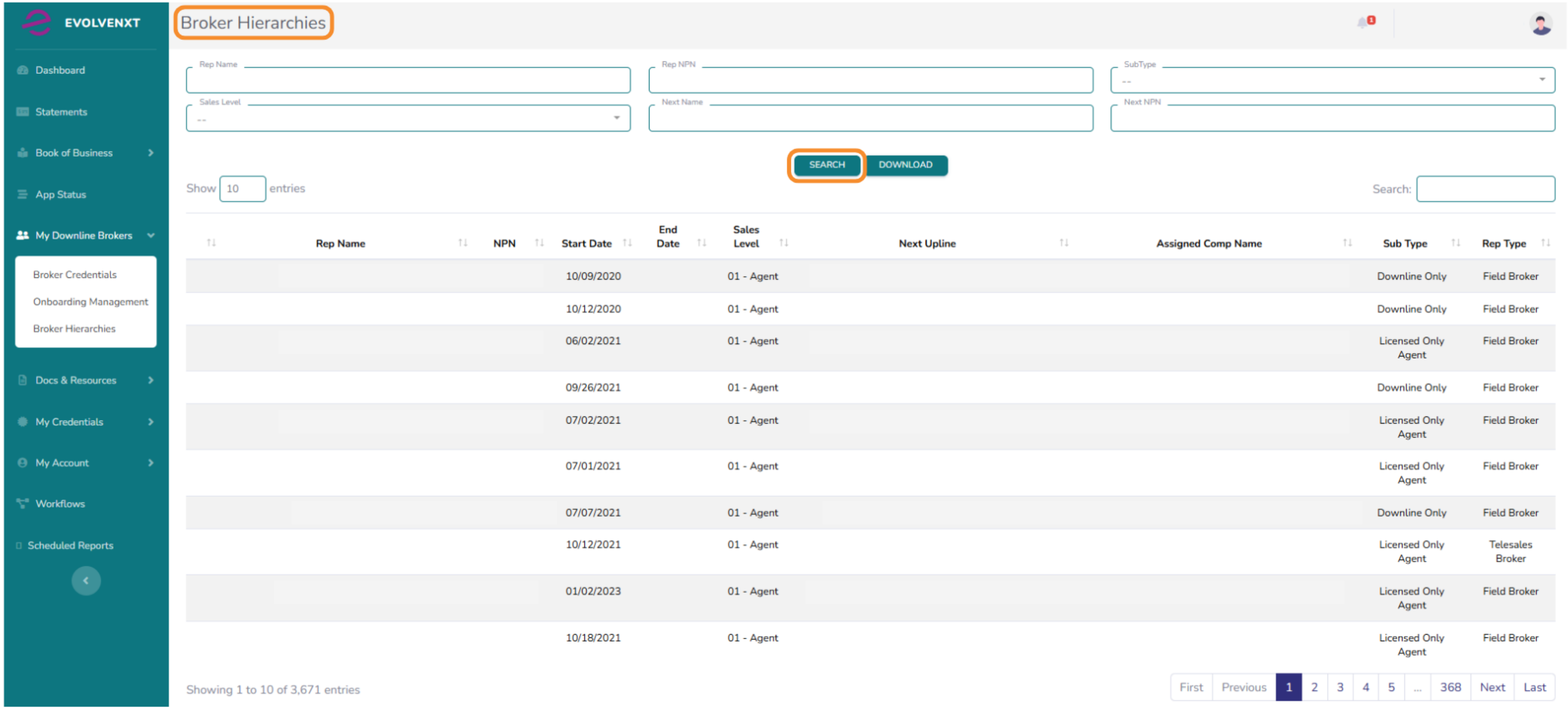
When creating an onboarding invitation, agencies will need the agent's NPN and a unique email address. When onboarding an agency, the agency invitation must be sent first before any downline agent invitations are created.



View may vary based on your representative type.

Broker Portal: Agency - My Downline Brokers | Broker Hierarchies

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



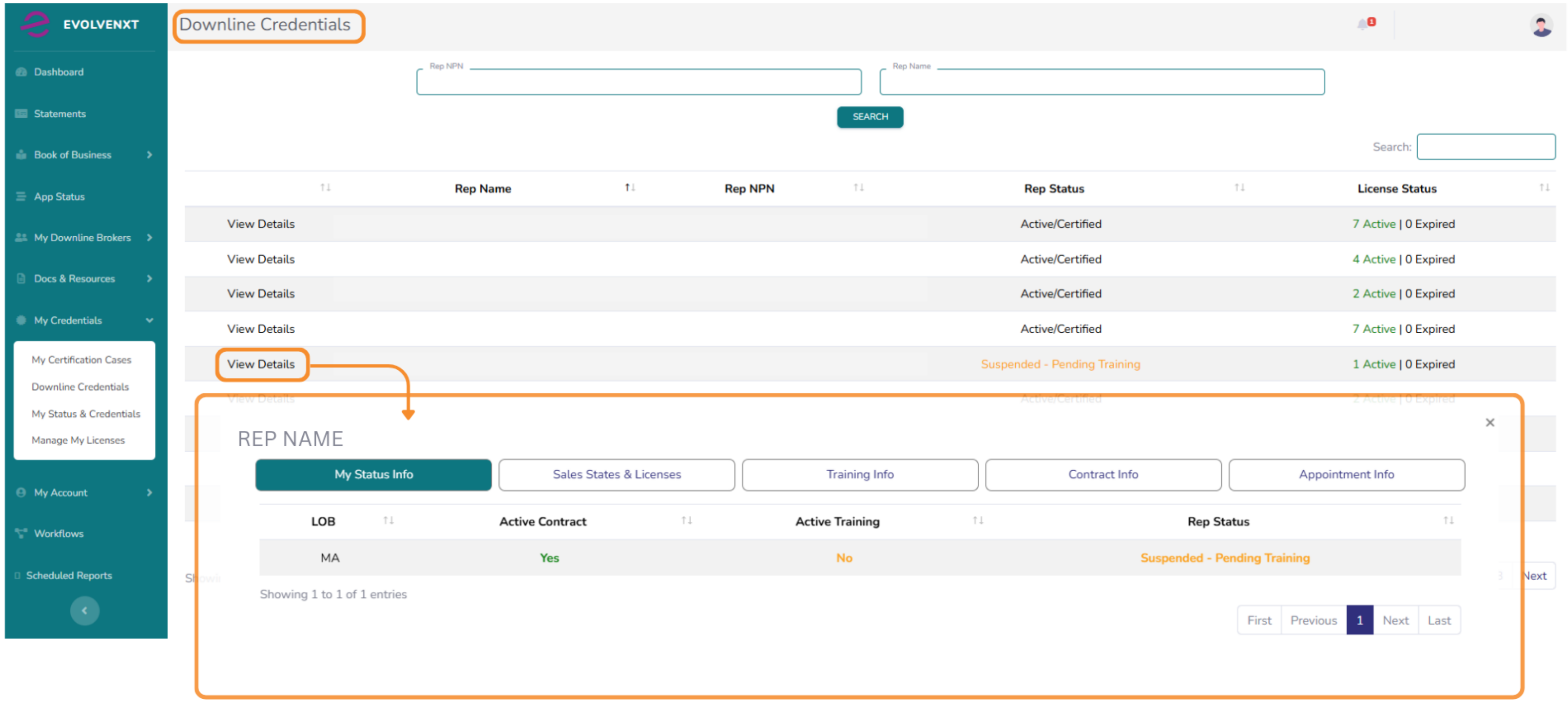
	Rep Name	NPN	Start Date	End Date	Sales Level	Next Upline	Assigned Comp Name	Sub Type	Rep Type
			10/09/2020		01 - Agent			Downline Only	Field Broker
			10/12/2020		01 - Agent			Downline Only	Field Broker
			06/02/2021		01 - Agent			Licensed Only Agent	Field Broker
			09/26/2021		01 - Agent			Downline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

View may vary based on your representative type.

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.

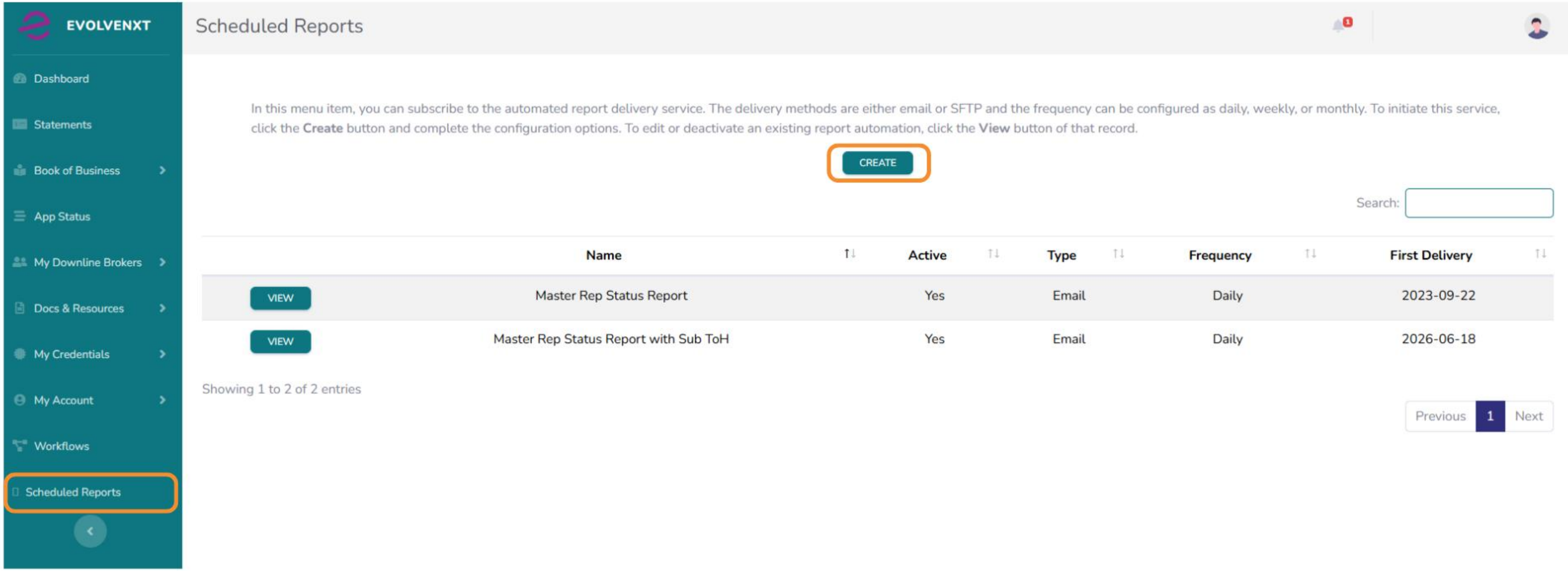
For example, when an agent is showing Suspended – Pending Training, agencies can search for the agent, select View Details, and review the information directly in the Broker Portal. This helps agencies resolve basic credential questions without relying on separate reports.



View may vary based on your representative type.

Broker Portal: Agency – Scheduled Reports

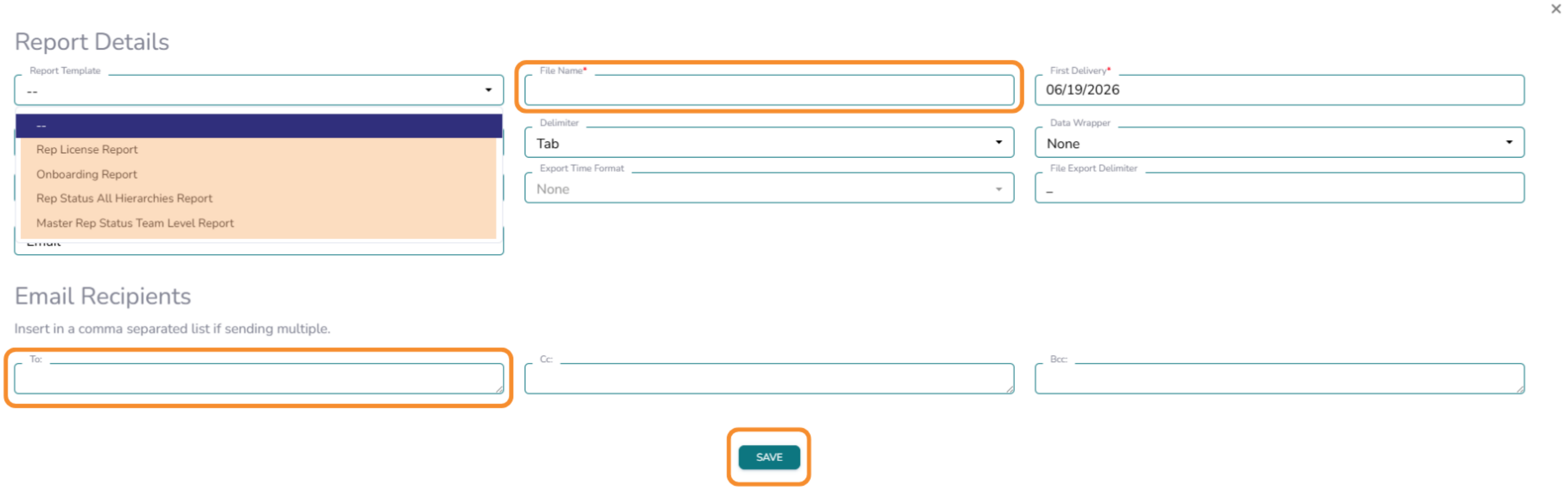
Agencies have access to a number of automated reports which can be sent via email directly from the system. The ***Scheduled Reports*** tab allows you to create new reports and view reports actively being sent.



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.



Questions? We’re here to help!

brokers@myzinghealth.com

1-844-946-4226

[Find your local contact]

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