Contracting

Hierarchy Change Requests (MA/PDP)

Quick Reference Guide (QRG)

Overview

Purpose

To give an understanding of the processes followed for various types of hierarchy change requests.

Objectives

This QRG will help you to:

Describe the process for raising and executing hierarchy change requests.

Target Audience

This guide is intended for the following business roles:

Frontline Brokers

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Please note:

All screenshots were pulled at a point in time and may look slightly different than the production environment.

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Glossary

Here are some of the key terms used in this QRG:

Key Term	Explanation
Hierarchy Change Request	A formal request submitted by a broker to modify their position or relationships within the organizational hierarchy, such as changing their upline or reporting structure.
Top Upline Agency	The highest-level agency in the broker hierarchy, typically responsible for approving hierarchy change requests submitted by brokers lower in the hierarchy.
New Upline	Required actions of the new agency or upline that is set to receive a broker as part of a hierarchy change request in EvolveNXT, including their role in reviewing and approving the transfer.
Previous Upline	The current agency or upline from which a broker is being transferred during a hierarchy change request in EvolveNXT, responsible for reviewing and releasing the broker.
Topline	A healthcare agency contracted at the highest level, responsible for overseeing downline agencies and brokers.

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Glossary

Here are some of the key terms used in this QRG:

Key Term	Explanation
NPN (National Producer Number)	A unique identifier assigned to licensed insurance brokers and agencies by the National Insurance Producer Registry (NIPR).
NIPR (National Insurance Producer Registry)	A centralized database used to validate and manage licensing information for insurance producers.
Sales Level Change	Refers to updating an agent’s commission level or tier for sales-related earnings.
Advance level change	Refers to updating the advance payment tier an agent qualifies for — typically used when commissions are paid in advance (before the actual premium is collected from the client).
Downline	A broker who operates under and reports to a higher-level broker or agency.

Remember

Agencies wishing to change their Topline hierarchies can view the rules and requirements in the Rules of Engagement on the agency portal.

Submit a Hierarchy Change Request

Hierarchy Change Request (MA/PDP)

Requestor

Perform the following steps to understand how you, as a broker, will submit a hierarchy change request for MA:

1. Log in to the HSB, select **Contracting**, and click **My Account** from the left panel. The sub-section will expand.
2. Click **My Hierarchy Info**. The hierarchy list will show up on screen.

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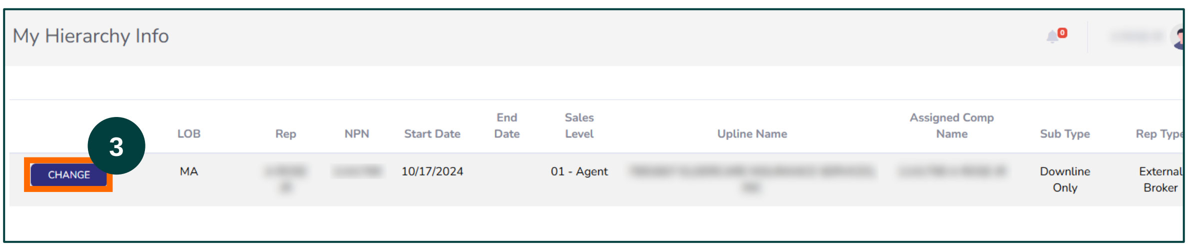
Hierarchy Change Request (MA/PDP)

Requestor

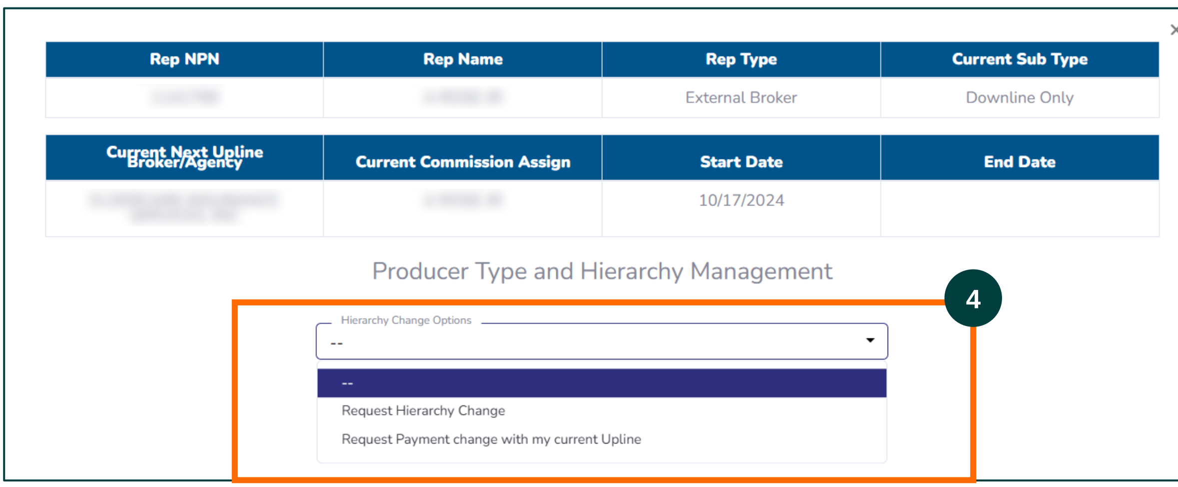
3. Click **CHANGE** to begin the process of raising a hierarchy change request**.** The details of the broker will be displayed.



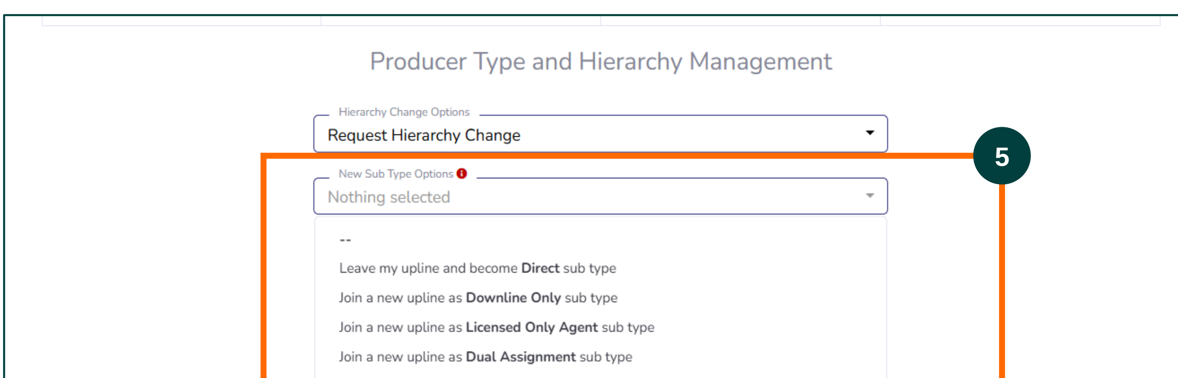
Hierarchy Change Request (MA/PDP)

Requestor

4. Select the relevant option from the **Hierarchy Change Options** dropdown.



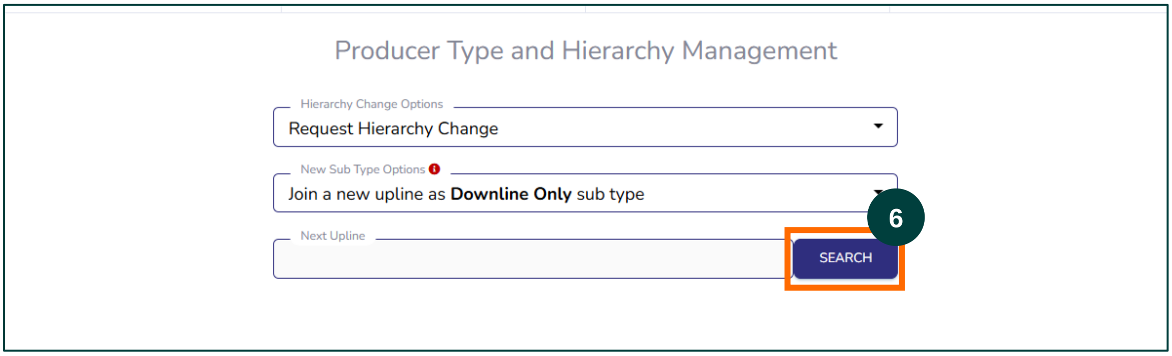
5. Select the relevant option from the **New Sub-Type Options** dropdown. You can click the **information icon** to view definitions for each item.



Hierarchy Change Request (MA/PDP)

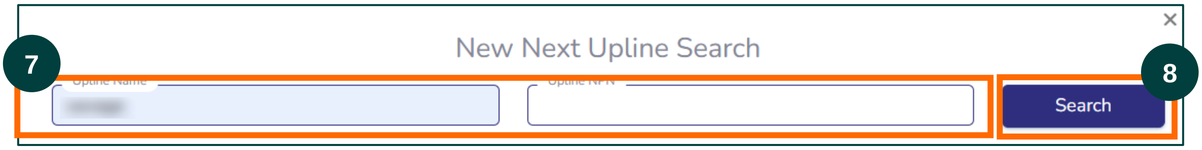
Requestor

6. Click **SEARCH** to view the upline that you would like to join.

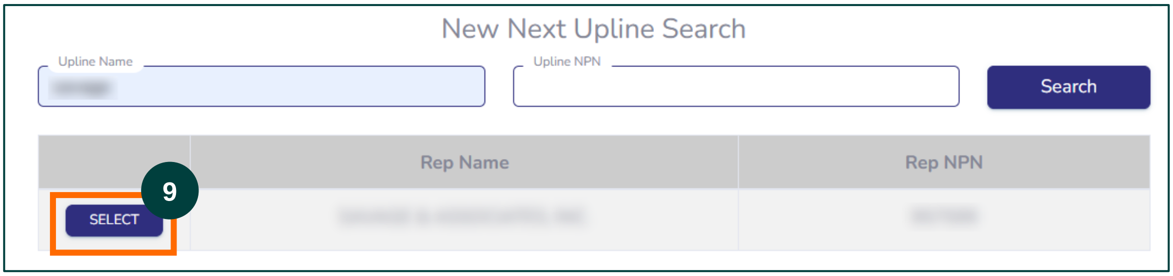


7. Enter the required details in the **Upline Name** or **Upline NPN** field.

8. Click **Search** to view the details of the required upline.



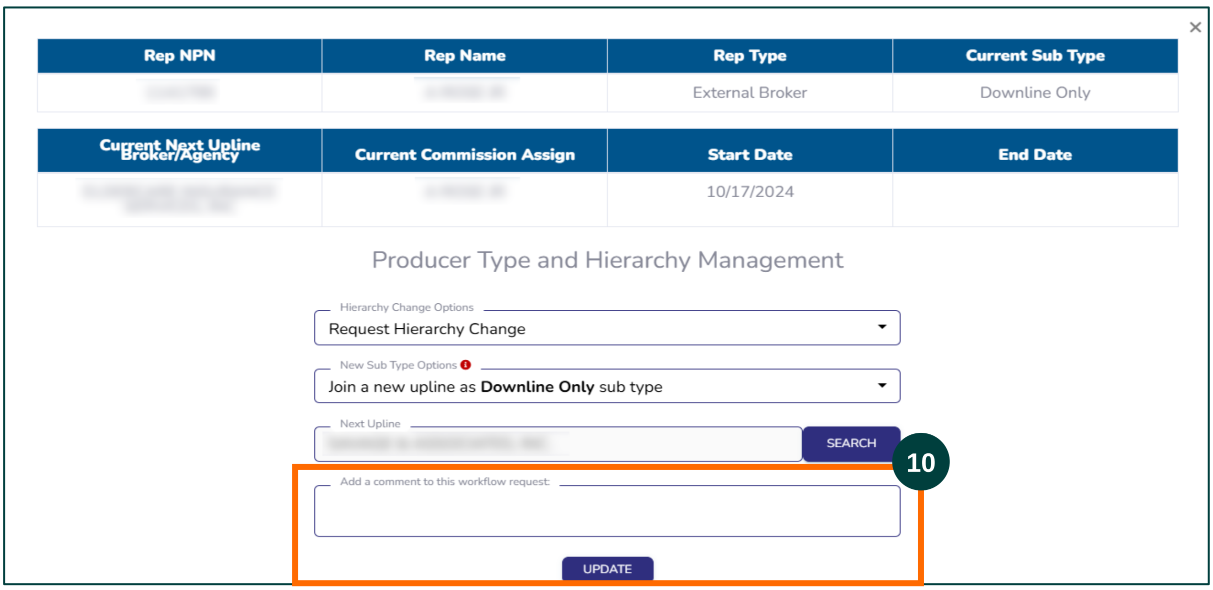
9. Click **SELECT** to select the upline from the search results.



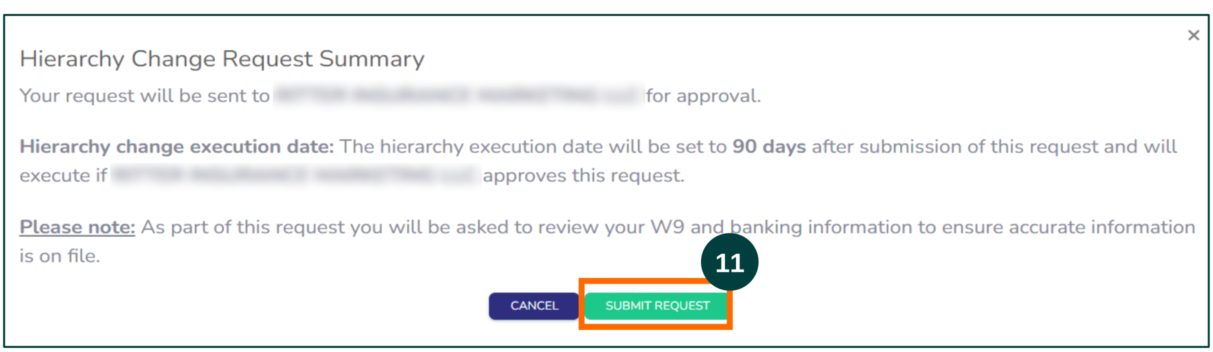
Hierarchy Change Request (MA/PDP)

Requestor

10. Add your **comments** and click **UPDATE** to proceed with the changes. Please note that the comments you add here are visible to all involved stakeholders, including your current hierarchy.



11. Click **SUBMIT REQUEST** in the **Hierarchy Change Request Summary** pop-up to complete the request.



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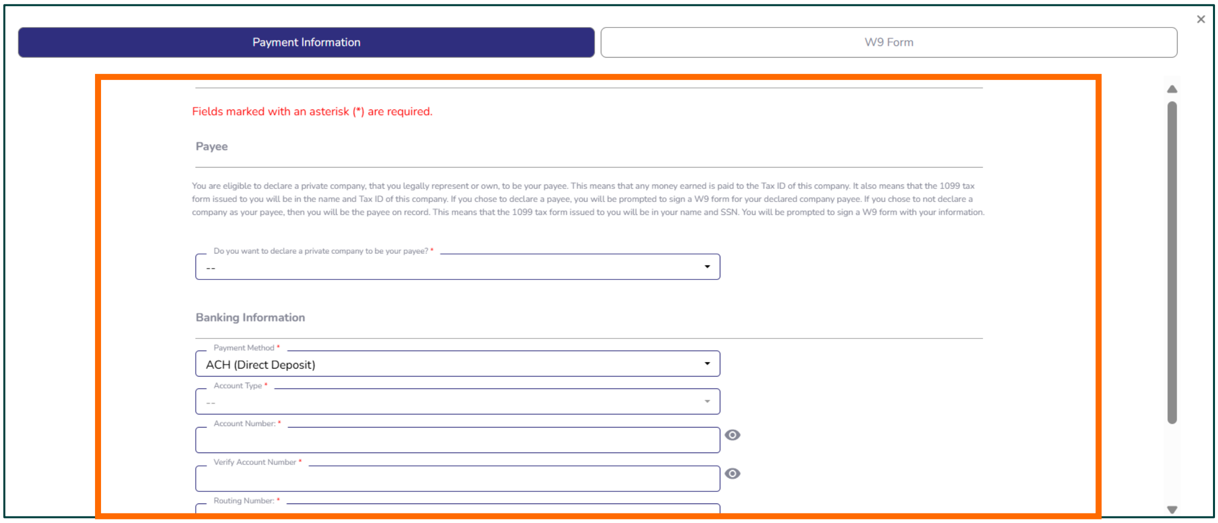
Hierarchy Change Request (MA/PDP)

Requestor

You will be redirected to your **payment details.** These will be pre-filled. You can make edits, if needed.



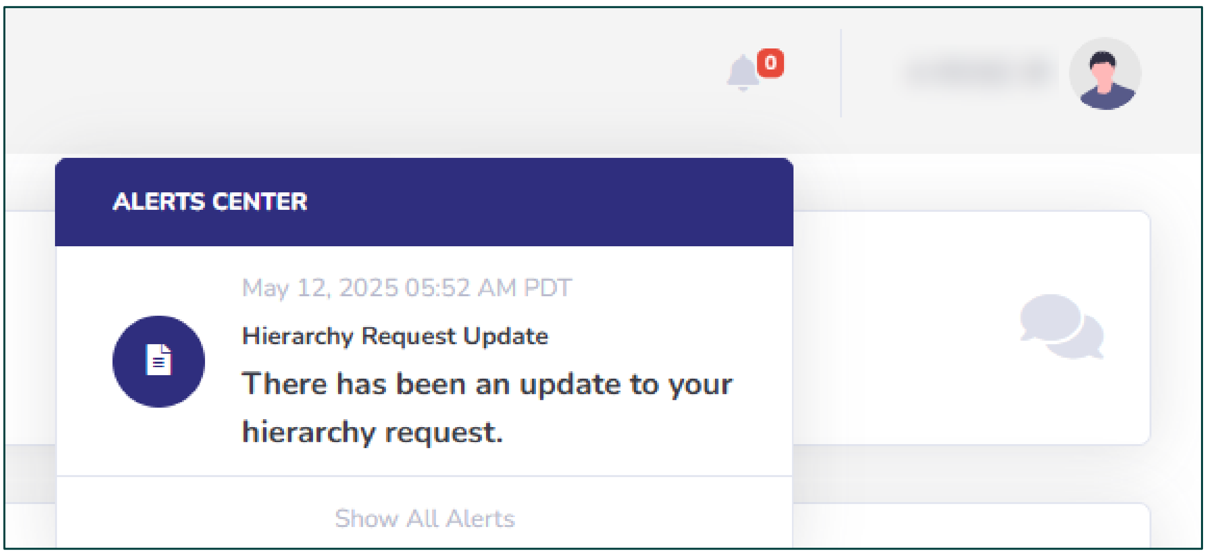
Note: The approval for hierarchy change will be provided by the topline agency.

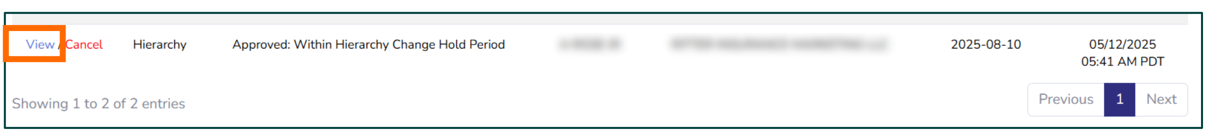
Hierarchy Change Request (MA/PDP)

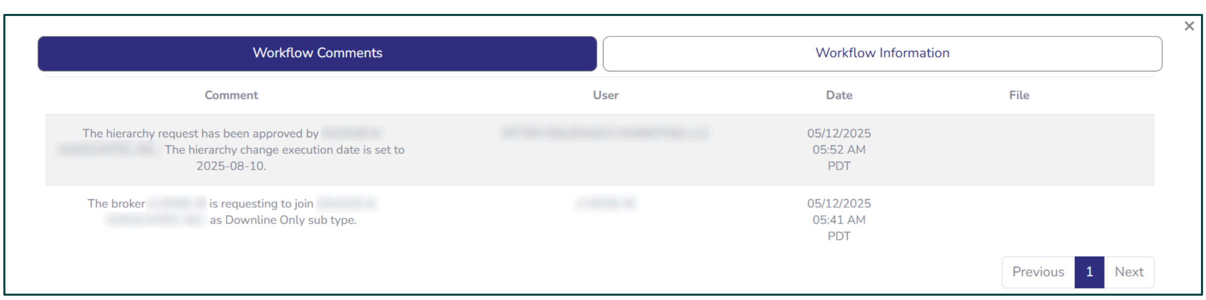
Requestor

At each stage of the process, the broker will receive relevant notifications.

The approvals are also visible in the Workflows tab on EvolveNXT. Clicking **View** will enable the broker to see the workflow comments and information.







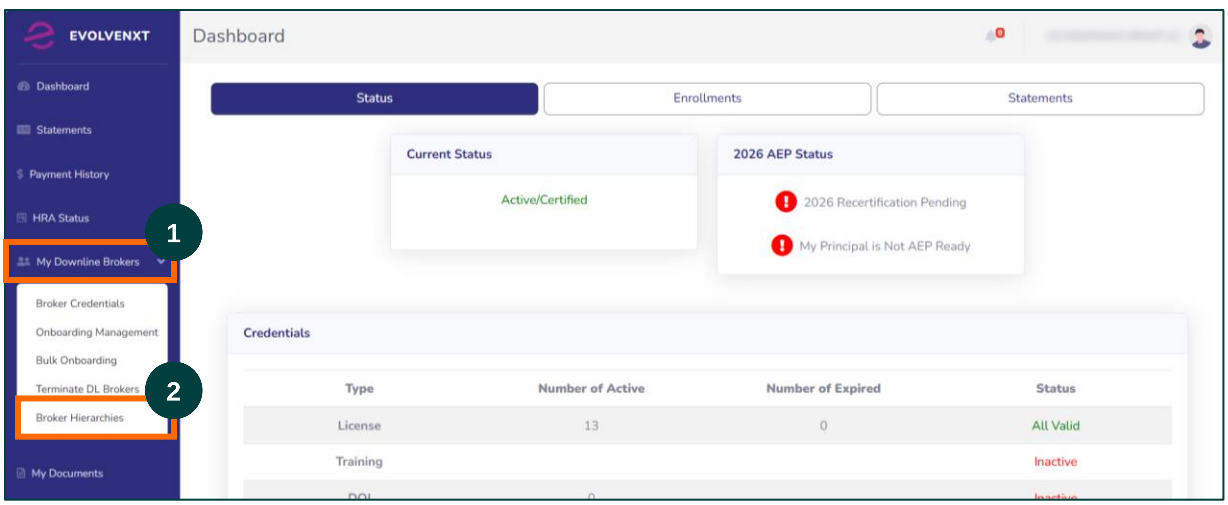
Sales Level Change Request (MA/PDP)

Hierarchy Change Request (MA/PDP)

Sales Level Change Request

Follow the steps given below to submit a sales level change request:

1. Login to the HSB and click **My Downline Brokers** from the left panel to expand it.
2. Click **Broker Hierarchies** to view the Medicare hierarchy list.



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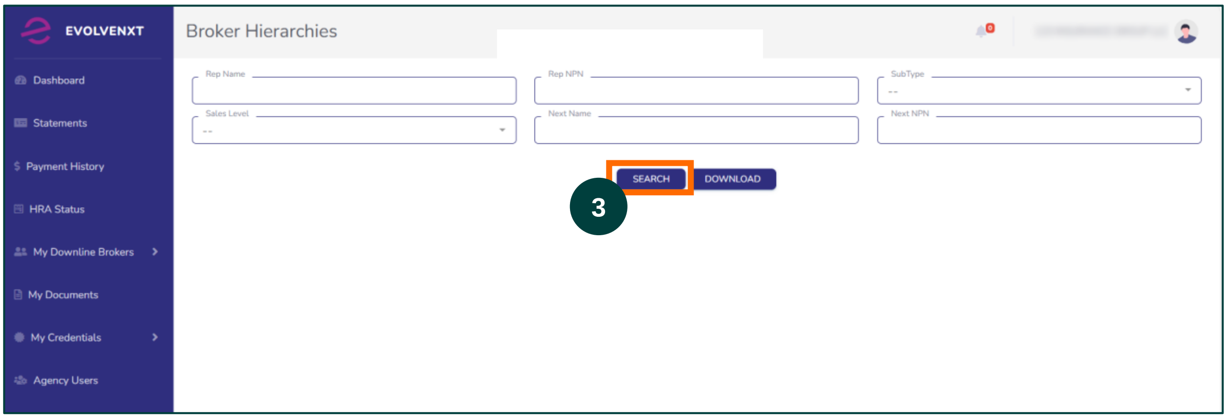
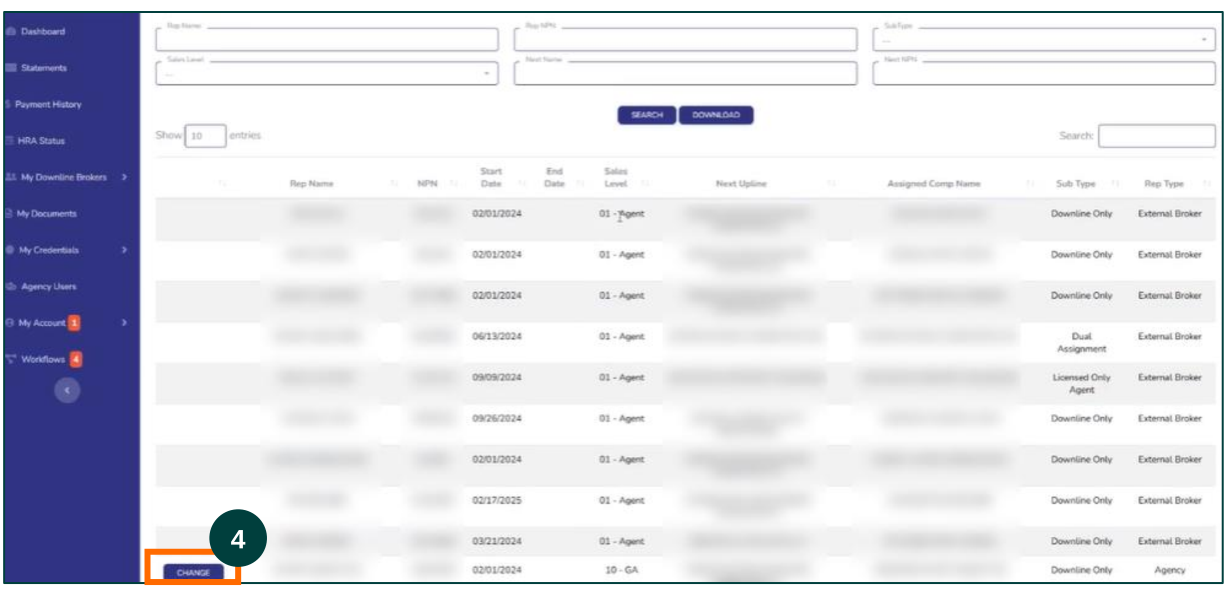
Hierarchy Change Request (MA/PDP)

Sales Level Change Request

3. Click **SEARCH** to view all the broker Medicare hierarchy records.



4. Click **CHANGE** to submit a sales level change request. The sales level needs to be changed for brokers with sales level other than 01.



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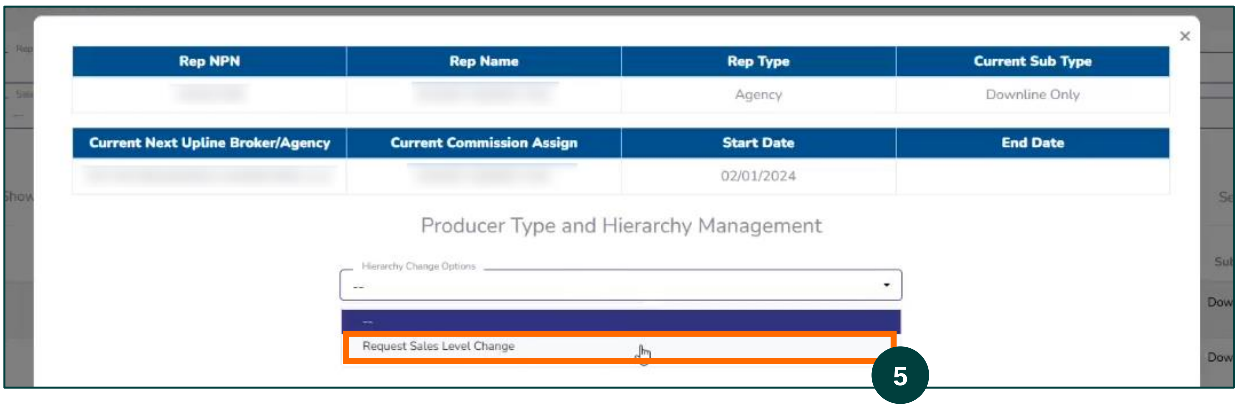
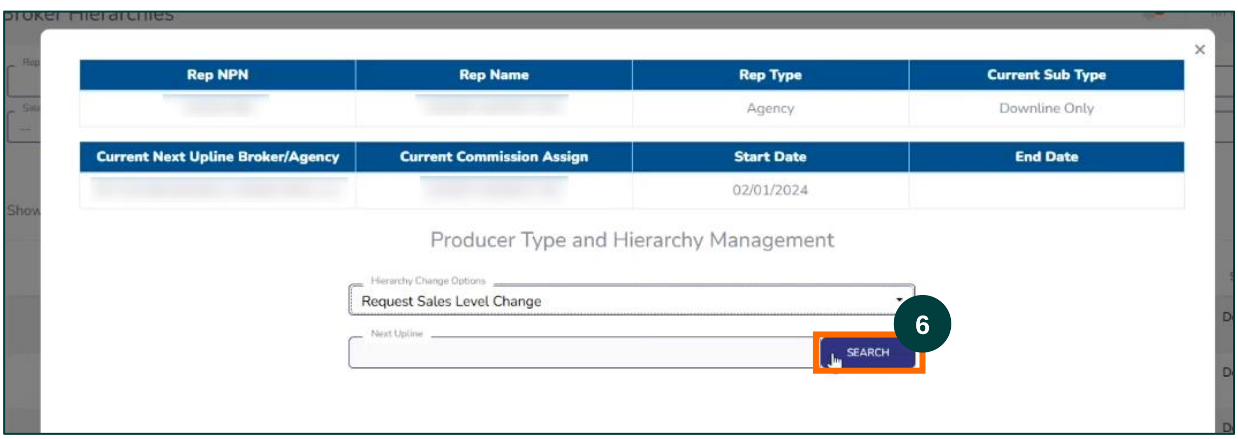
Hierarchy Change Request (MA/PDP)

Sales Level Change Request

5. Select the **Request Sales Level Change** option from the **Hierarchy Change Options** dropdown.



6. Click **SEARCH** to search for the next upline agency.



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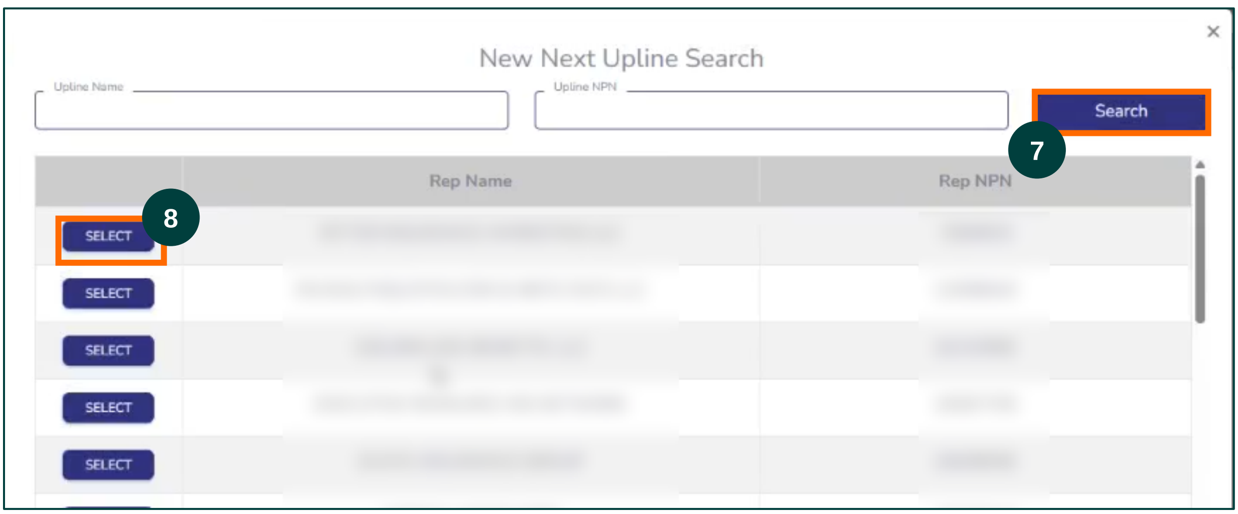
Hierarchy Change Request (MA/PDP)

Sales Level Change Request

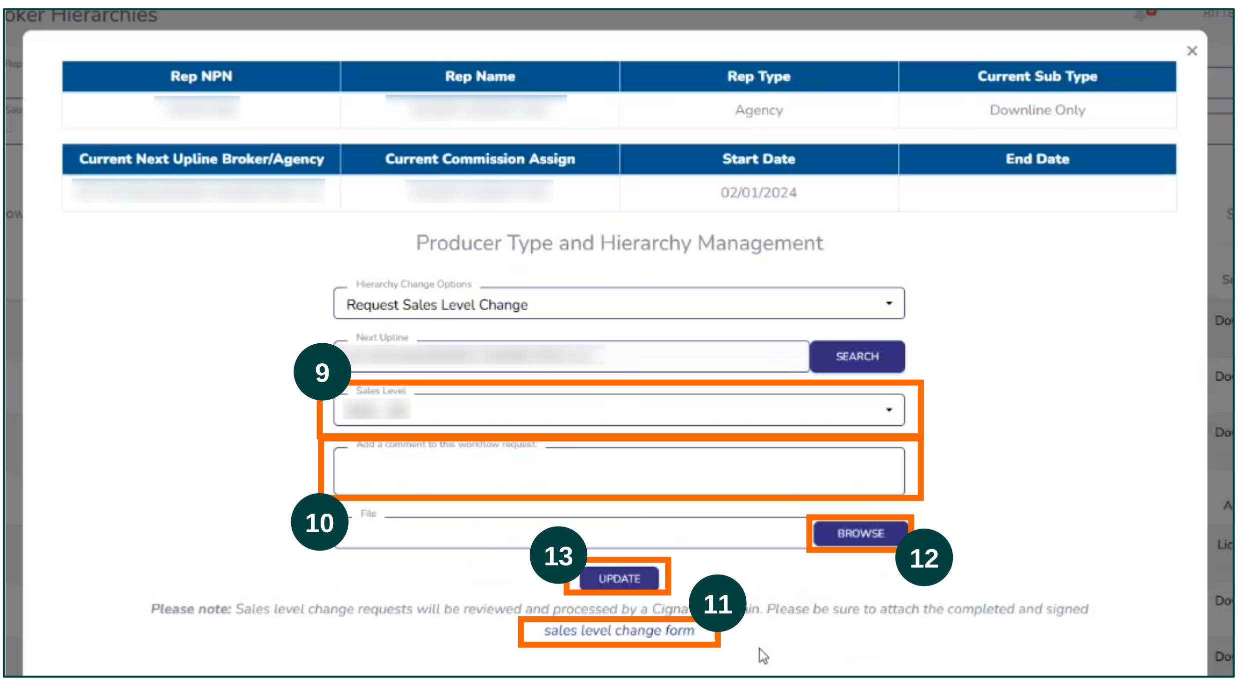
7. Enter the required upline name and **NPN** in the **Upline Name** or **Upline NPN** field, then click **SEARCH** to display the required results..
8. Click **SELECT** against the required broker or agency to choose the next upline.



Hierarchy Change Request (MA/PDP)

Sales Level Change Request

9. Select the required sales level from the **Sales Level** dropdown.
10. Enter the required comment in the **Add a comment to the workflow request** field.
11. Click the **sales level change form** link to download the request form. Fill in the required details, sign the form, and upload it.
12. Click **BROWSE** to upload the signed sales level change form.
13. Click **UPDATE** to submit the sales level change request.



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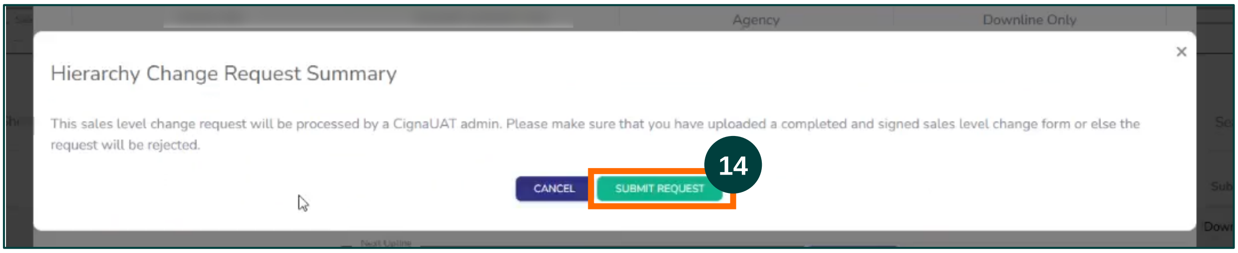
Hierarchy Change Request (MA/PDP)

Sales Level Change Request

14. The **Hierarchy Change Request Summary** pop-up appears. Click **SUBMIT REQUEST** to submit the sales level change request.



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Thank You!

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