Evolve Guide for MAPD/PDP Agents

Job aid for HealthSpring MAPD/PDP agents for navigating Evolve

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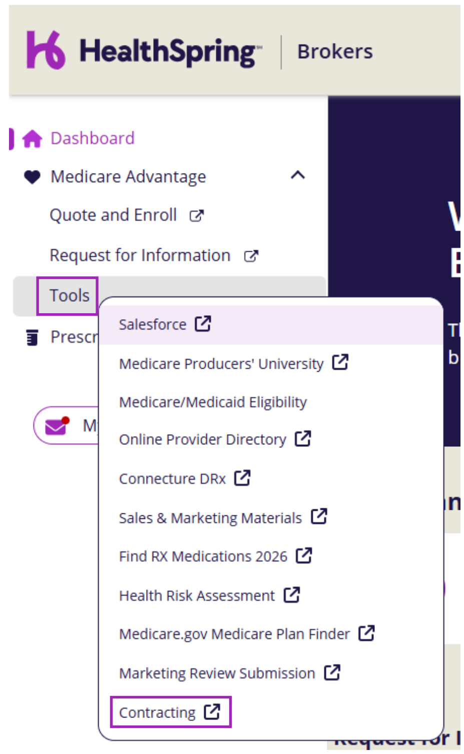
Note: Within the Evolve system, you may see references to CSB. As part of a branding update, **CSB is transitioning to HSB**. Both terms may appear during this transition period.

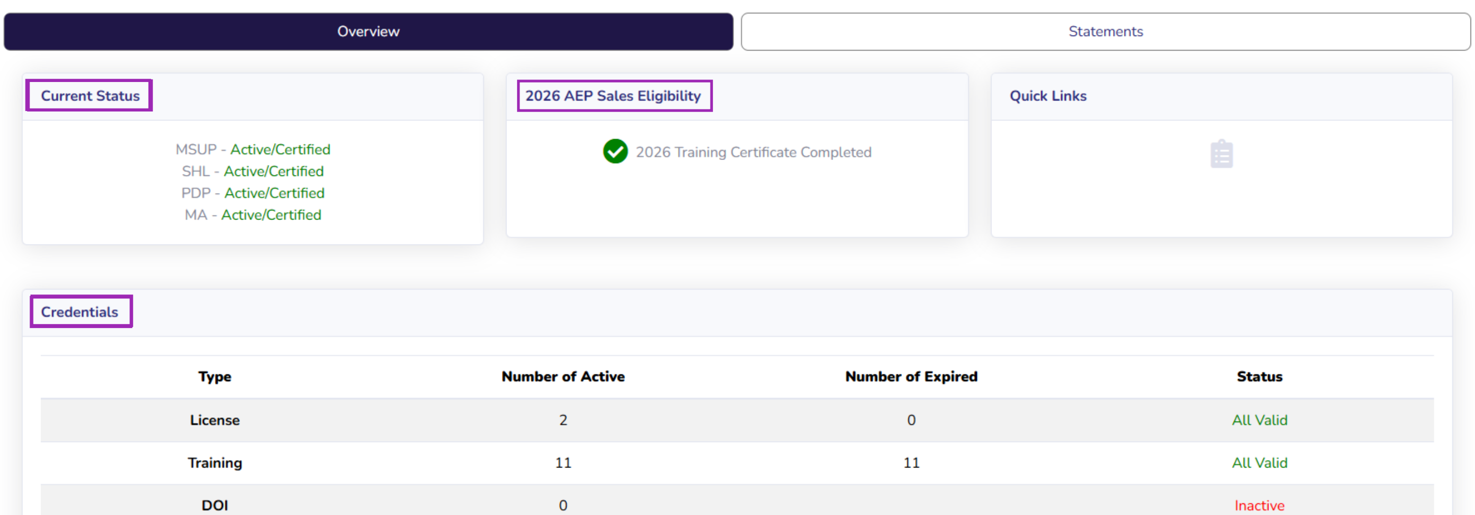
Agent Dashboard

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

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



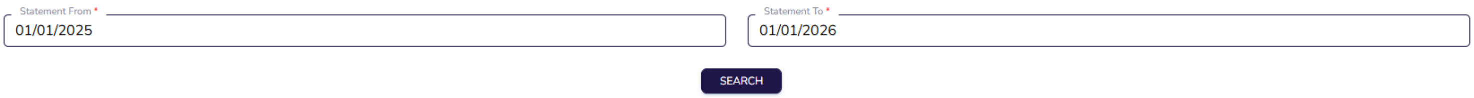
Upon logging in, Evolve will default to the Broker Dashboard which provides a basic overview of the broker's information (e.g., current status by LOB, RTS status, license information, etc).



Statements

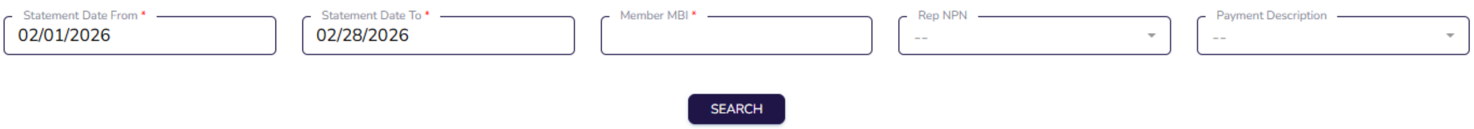
This section provides access to commissions statements searchable by date range. To pull a specific range, enter the applicable dates in the **statement from** and **statement to** fields then click **search**.

To pull all available statements, leave the date range blank and click **search**.



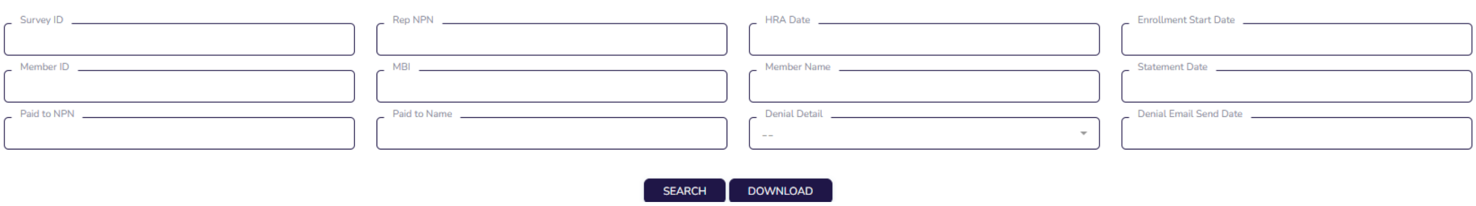
Payment History

This section provides access to specific payment history, searchable by date range, member MBI, rep NPN, and payment type.



HRA Status

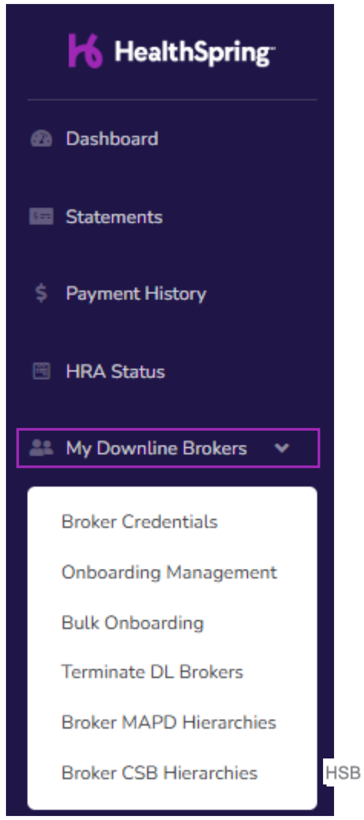
This section provides access to HRA status information. Search by Member ID or MBI to verify HRA payment amount. HRA Payments should be released a month after the application's effective date (e.g., 2.1.2026 HRA should pay in March subject to the commissions calendar included in the agent's compensation schedule).



My Downline Brokers

All subsections in **My Downline Brokers** applies only to HealthSpring Supplemental Benefits and will not be applicable for MAPD/PDP brokers.

Information provided below these sections are for general information purposes only.



Broker Credentials

This section provides access to specific downline credentialing information broken out into the below categories.

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

A full list of all downlines can be pulled for each individual category or you can search for specific downlines.

Onboarding Management

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

Creating a New Onboarding Case (single)

Please reach out to ARCSHL@HealthSpring.com for details on creating cases if this applies to you for HealthSpring Supplemental Benefits.

Creating a Bulk Case Creation file

Please reach out to ARCSHL@HealthSpring.com for details on creating cases if this applies to you for HealthSpring Supplemental Benefits.

Terminate DL Brokers

Please reach out to ARCSHL@HealthSpring.com for details on terminating downlines if this applies to you for HealthSpring Supplemental Benefits.

Broker MAPD Hierarchies

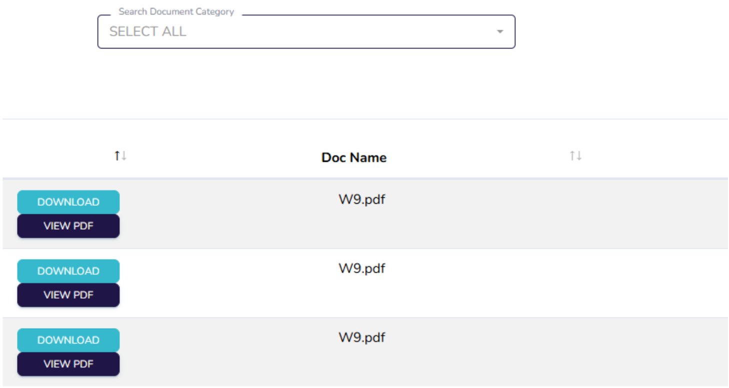
This section does not apply for MAPD/PDP brokers as brokers can only contract under a validly contracted agency for MAPD/PDP.

Broker HSB Hierarchies

Please reach out to ARCSHL@HealthSpring.com for details on this section if this applies to you for HealthSpring Supplemental Benefits.

My Documents

This section contains W9s and Compensation Rate Schedules.



My Credentials

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

My Certification Cases

This is where any in-progress onboarding cases will be displayed.

My Status & Credentials

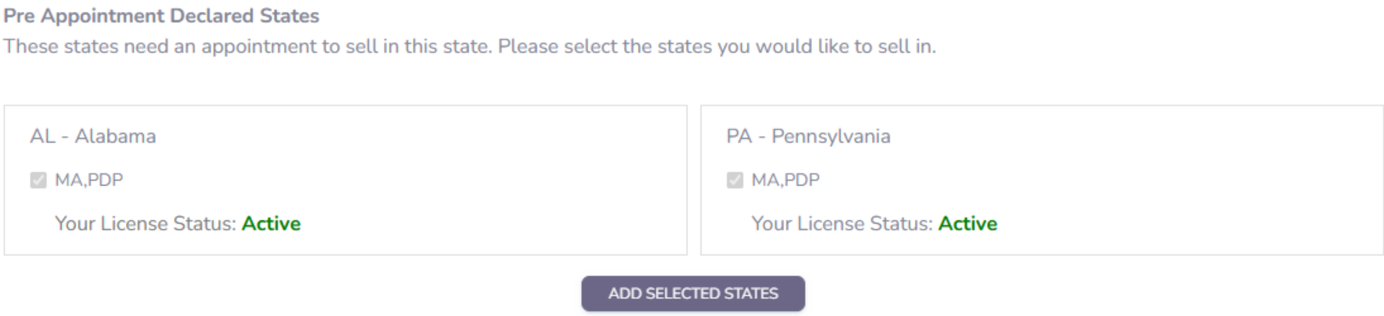
This section provides details for status, states & licenses, training info, contract info, and appointment info across all lines of business a broker is currently contracted for broken out by category.

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

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

HSB Manage My Sales States

This is where new pre-appoint states can be declared, separated by HSB and MAPDP tabs. To declare a new pre-appoint state, click the tab for the appropriate line of business, then select the state(s) you wish to add and click **Add Selected States**. This will submit the pre-appoint state to be added to the **Declared Sales State** tab. This action submits the appointment request to the state for processing.



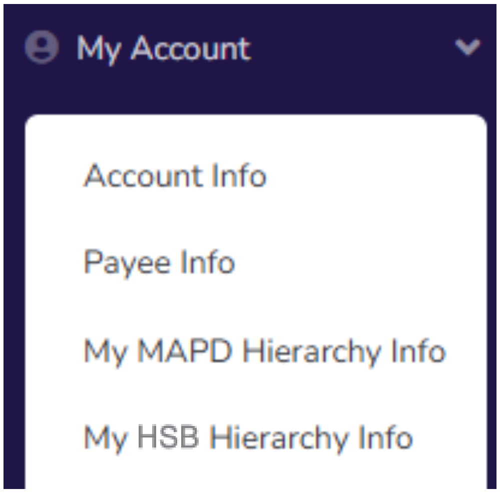
Just-in-Time states are listed at the bottom of each page with current license statuses for each state.

HSB Appointment Info

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

My Account

This section contains information related to broker demographics.



Payee Info

Broker payee information (across all LOBs) is listed here. Payees can be removed, edited, or added at any time. Payees can be the broker (to be paid directly) or an established business entity. Banking information is also located and editable in this section.

My MAPD Hierarchy Info

Current and past MAPD/PDP hierarchies are shown here with levels and dates included.

My HSB Hierarchy Info

Current and past HealthSpring Supplemental Benefits hierarchies are shown here with levels and dates included.

Workflows

Hierarchy and/or pay level change requests submitted and in progress will be listed here.

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

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

Clicking on **View** next to the request will provide additional detail indicating where the request is in the workflow.

Note: For hierarchy change requests including a move from one topline agency to another, the request must be approved by the topline you are moving to then by the topline you are moving away from. If the current topline agency does not approve the request, you will automatically drop into a 90-day hierarchy hold and the request will execute at the end of the 90 days (no further action is required). **Current toplines do not have an option to deny a hierarchy change request; they can only approve or disregard.**

For hierarchy changes within the same topline or a pay level change, only the current topline agency needs to approve. Once approved, the change will execute the following day.

Helpful Information

Onboarding Case Statuses

Case status detail can be found in the contracting portal under **My Credentials** and then **My Certification Cases** in the status column.

LoB	Type	Status	Email	NPN	Broker Type	Broker Sub Type	Sales Level	Name	Upline Name	Creation Date	Email Send Date	Year	Submitted By
MA & PDP	Initial	Approved	[redacted]	[redacted]	External Telesales Broker	Licensed Only Agent	Agent - 01	[redacted]	ELITE INSURANCE GROUP	02/16/2026	02/16/2026	2026	[redacted]

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

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

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

Cancelled: Case cancelled by the submitting agency.

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

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

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

Pending Check: Pending either BI or debt check.

Review – BG Check: BI review in progress.

Failed Background Check: Background investigation graded a fail.

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

Glossary

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

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

Direct: Broker contracted direct to HealthSpring MAPD/PDP.

Hierarchy CR Portal: Hierarchy change portal.

LOB: Line of Business.

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

NPN Exclusion List: List of Brokers/Agencies with Do Not Contract status.

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

Rep Type:

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

Rep Sub Type:

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

Rep Status:

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