HealthSpring℠

Evolve Guide for HSB Agents

Job aid for HealthSpring HSB 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.

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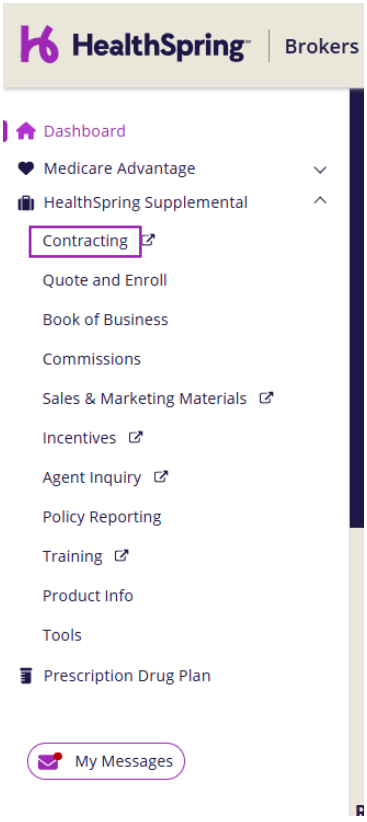
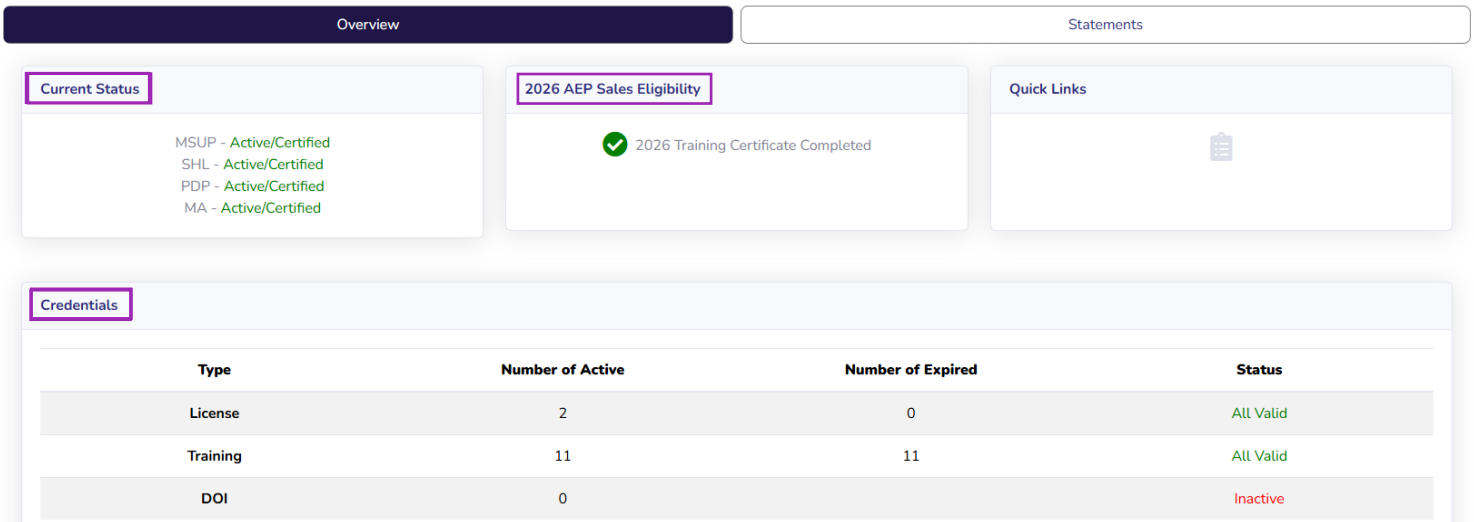
Agent Dashboard

From the HealthSpring for Brokers (HFB) portal, click **Tools**, then click **Contracting** to access the Evolve platform (for HFB login issues, please email ARCSHL@HealthSpring.com or call **877-454-0923**). 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).



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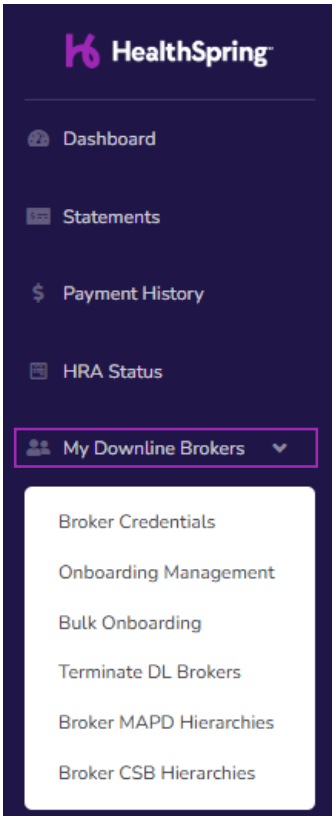
My Downline Brokers

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
- 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 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**.

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Creating a New Onboarding Case (single)

1. Click **Create Individual Invite** to open the case creation screen.
2. Enter the producer's NPN then click **Verify**. If the agent is eligible to be onboarded, the **onboarding type** will generate appropriately as either **Initial**, **Reonboarding**, or **Add LOB**.
3. Enter the producer's email address in the **Email** field (email addresses must be unique for each producer).
4. Select the appropriate LOB in the **LOB** field.
5. Select the appropriate Rep Type in the **Rep Type** field (producers cannot have different rep types across LOBs so, if they are telesales for MAPDP, they must be telesales for MA/PDP and vice versa).
6. Select the appropriate Sub Type in the **HSB Sub Type** field.
7. Click **Change Next Upline** under **Select Upline Below** to enter the direct upline agency.
8. Enter either the upline agency's name or NPN then click **Search** to generate a list of available uplines.
9. Click select next to the appropriate upline agency.
10. Select the appropriate Sales Level for the producers in the **HSB Sales Level** field.
11. Need to add in Select Advance options for HSB LOB's.
12. Click **Create** to finish creating the case. An email will be sent immediately to the email address entered for the broker/agency with instructions detailing how to access their contracting case and the link to HealthSpring for Brokers.

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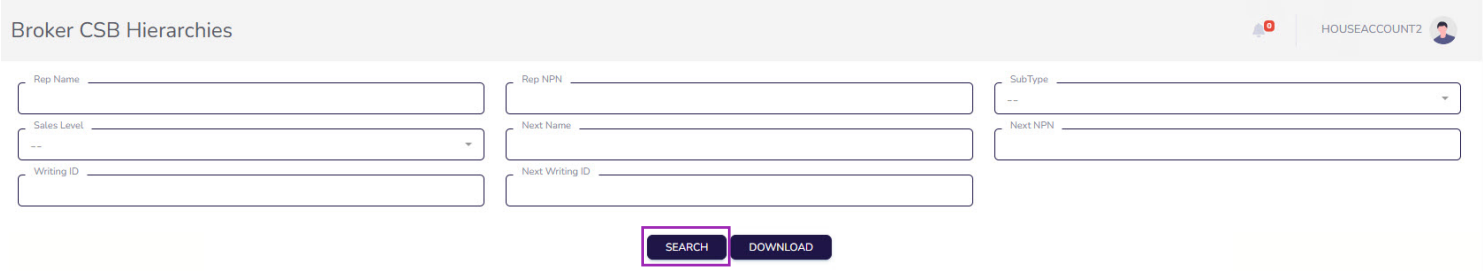
Terminate DL Brokers

For all HSB terminations, those requests will still be submitted via email to HSBAgentContracting@HealthSpring.com with the producers' full name, NPN(s), and reason for termination included.

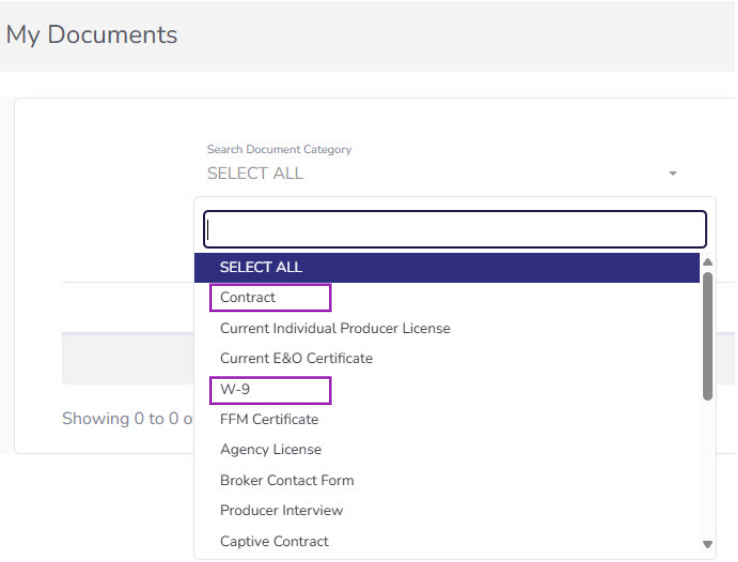
Broker HSB Hierarchies

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



My Documents

This section contains copies of the signed **Contract** and **W9** for the agency.



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My Credentials

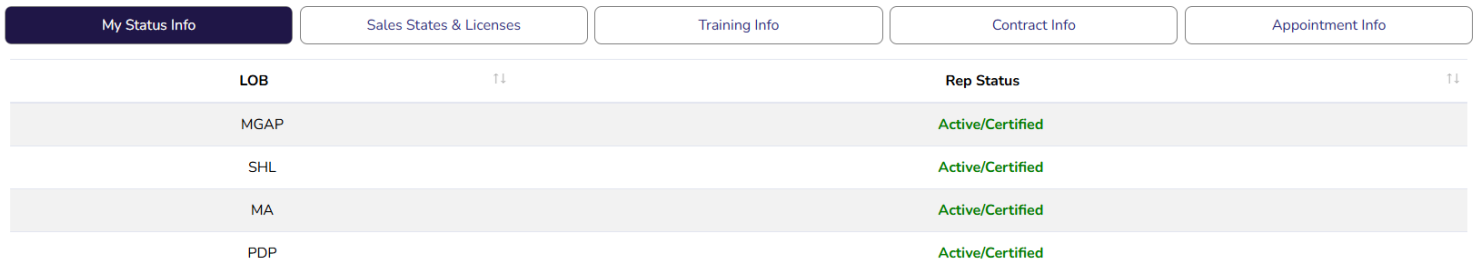
This section provides information related to certification cases, status & credentials, and sales states.

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.



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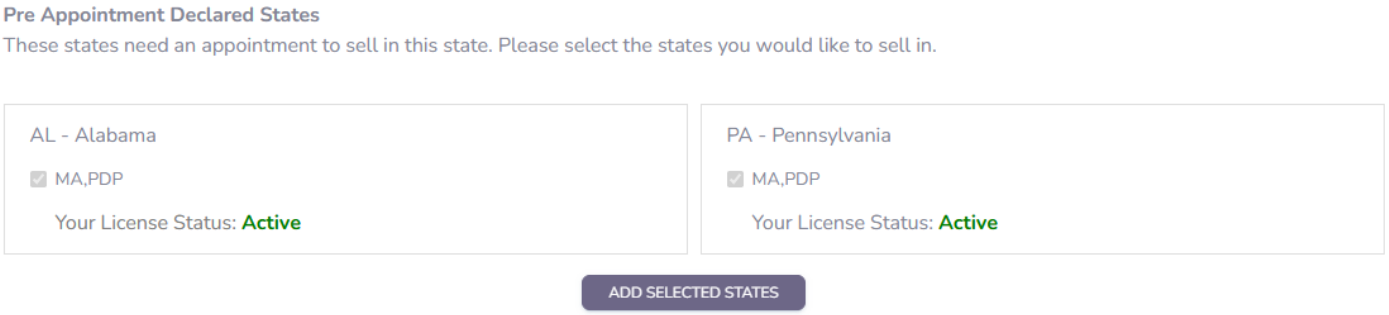
HSB Manage My Sales States

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.

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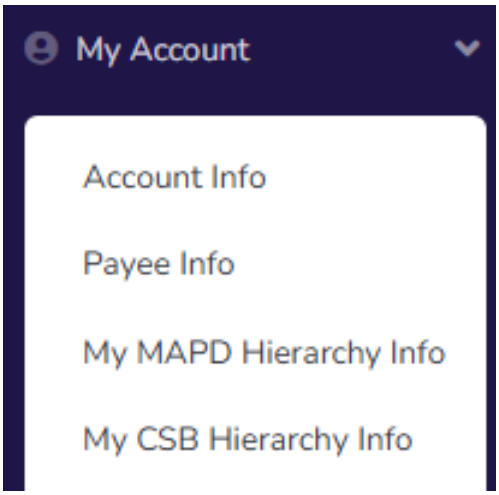
My Account

This section contains information related to broker demographics.



Account Info

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

Payee Info

This is where banking information can be updated on the HSB tab. Click **Edit Banking Info**, click **Hide Information** to show the data, make updates, click **Save**.

My HSB Hierarchy Info

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

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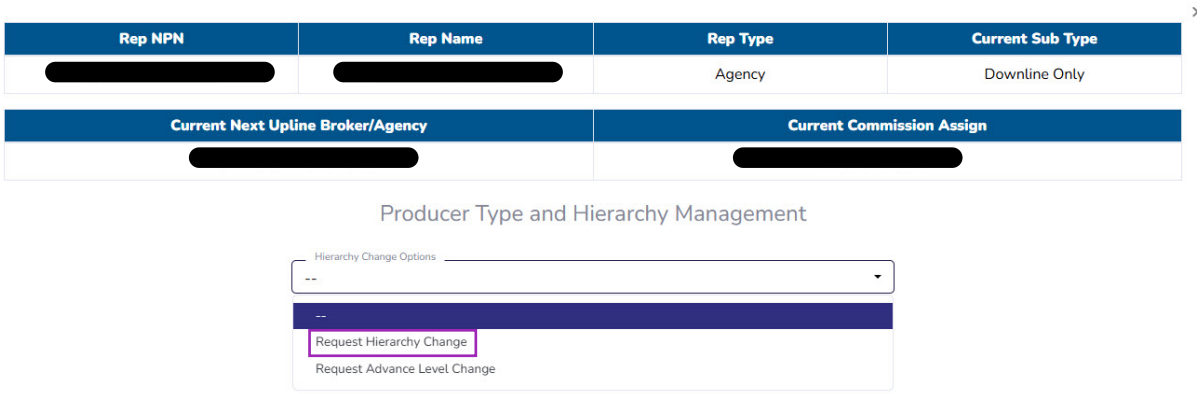
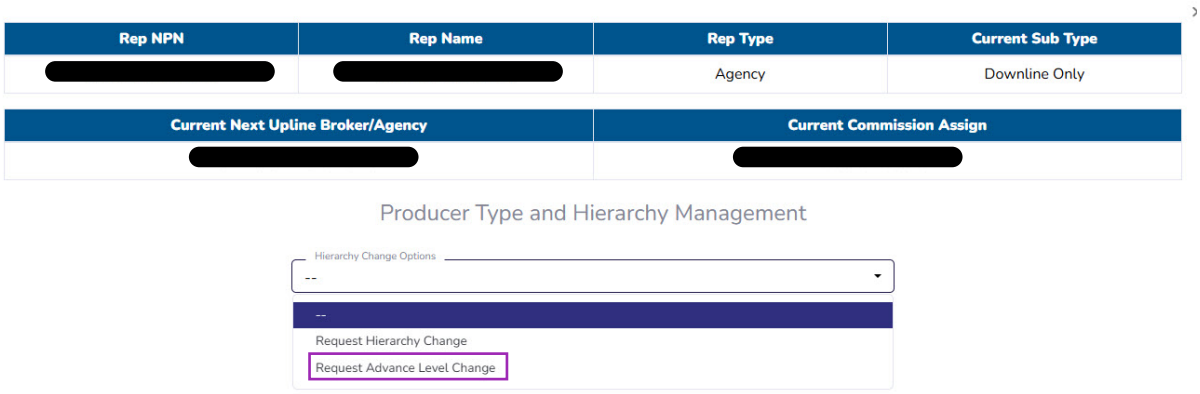
Agent Upgrades

Upgrades are requested from **My Account > My HSB Hierarchy Info > Change HSB**.

1. **REQUEST HIERARCHY CHANGE:** A true hierarchy change where they change the next agency they report to OR change their sales level within the same agency.



2. **REQUEST ADVANCE LEVEL CHANGE:** A commission advance level change where their hierarchy remains unchanged but the commission advance will be updated.



3. Add any applicable comments (optional).

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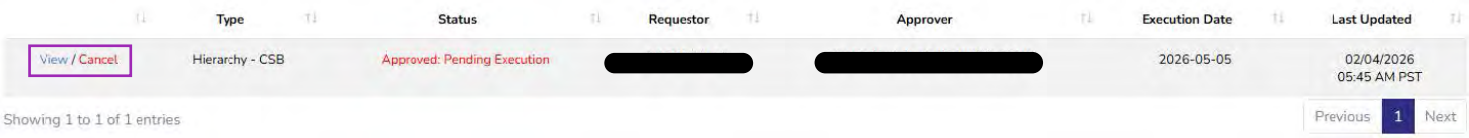
Workflows

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



	Type	Status	Requestor	Approver	Execution Date	Last Updated
View / Cancel	Hierarchy - CSB	Approved: Pending Execution	[redacted]	[redacted]	2026-05-05	02/04/2026 05:45 AM PST

Showing 1 to 1 of 1 entries

Previous 1 Next

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** and **advance** changes within the same topline or a pay level change, only the current topline agency needs to approve. Once approved and contract completed (if applicable), the change will execute the following day.

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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
[redacted] Supplemental Benefits	Initial	Approved	[redacted]	[redacted]	External Broker	Downline Only	AGENT III - 10	[redacted]	TBF AGENCY INC	06/25/2026	06/25/2026	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.

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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 HSB.

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.
- **Dual Assignment**: Broker assigning commissions to direct upline.
- **Licensed-Only Agent (LOA)**: Broker paid salary by their agency, not eligible for commissions per sale, upline owns the broker's BOB.

Rep Status:

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

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