



Contracting

Hierarchy Change Request (CSB)

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

Please note:

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

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.

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 (CSB)

Hierarchy Change Request (CSB)

Requestor

Perform the following steps to understand how a broker will submit a hierarchy change request for CSB:

1. Log in to HFB, click **Contracting** and click **My Account** from the left panel. The sub-section will expand.
2. Click **My CSB Hierarchy Info**. The hierarchy list will be displayed on screen.



Hierarchy Change Request (CSB)

Requestor

- 3. Click **CHANGE CSB** to begin the process of submitting a hierarchy change request. The details will be displayed.

My CSB Hierarchy Info

3

CHANGE CSB

LOB	Rep	NPN	Writing ID	Company	Market Code	Start Date	End Date	Sales Level	Upline Name	Assigned Comp Name	Sub Type	Rep Type
MSUP						09/07/2023		60 - GA			Downline Only	External Broker
MSUP						05/05/2020		60 - GA			Downline Only	External Broker

Hierarchy Change Request (CSB)

Requestor

- 4. Select the **Request Hierarchy Change** option from the **Hierarchy Change Options** dropdown.

Rep NPN	Rep Name	Rep Type	Current Sub Type
		External Broker	Downline Only

Current Next Upline Broker/Agency	Current Commission Assign

Producer Type and Hierarchy Management

Hierarchy Change Options

--

Request Hierarchy Change

Request Advance Level Change

- 5. Click **SEARCH** to look for the upline you would like to join.

Producer Type and Hierarchy Management

Hierarchy Change Options

Request Hierarchy Change

Next Upline

SEARCH

Hierarchy Change Request (CSB)

Requestor

- 6. Enter the required details in the **Upline Name** or **Upline NPN** field.
- 7. Click **Search** to view the details of the required upline.

6

New Next Upline Search

Upline Name

Upline NPN

Writing ID

7

Search

- 8. Click **SELECT** against the displayed upline to proceed with updating it.

New Next Upline Search

Upline Name

Upline NPN

Writing ID

Search

	Rep Name	Rep NPN	Writing ID	Market Code
8 SELECT				



Note: Ensure the correct spelling and casing of the new upline is selected to correctly populate the upline.

Hierarchy Change Request (CSB)

Requestor

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

Producer Type and Hierarchy Management

Hierarchy Change Options
Request Hierarchy Change

Next Upline **SEARCH**

Add a comment to this workflow request:

UPDATE

Please note: The information in this workflow may be visible to all involved stakeholders, including your current hierarchy.

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

Hierarchy Change Request Summary

Your request will be sent to the top of hierarchy [redacted] for approval.

Once approved, you will be notified and asked to complete a new contracting workflow.

Hierarchy change execution date: The hierarchy execution date will be set to 90 days after submission of this request. Once [redacted] has approved this request, your current top of hierarchy [redacted] will be notified and they can choose to grant an immediate release. Please contact [redacted] if you wish to get an early release.

CANCEL **SUBMIT REQUEST**

Complete Contracting Case (CSB)

Hierarchy Change Request (CSB)

Requestor

Follow the steps below to understand how contracting case that is created for the broker/agency works for who submitted the request:

1. Log in to HFB, click **Contracting** and click **My Credentials** to view the additional options.
2. Click **My Certification Cases** to view the existing contracting cases.

The screenshot shows the HFB dashboard interface. On the left is a dark blue sidebar with a navigation menu. The main content area has a white background with a top navigation bar containing 'Status' and 'Enrollments' tabs. Below the tabs are two summary cards: 'Current Status' showing 'Suspended -' and '2026 AEP Status' with two red warning icons. At the bottom is a 'Credentials' table.

Navigation Menu (Left Sidebar):

- Dashboard
- Statements
- Payment History
- HRA Status
- My Downline Brokers
- My Documents
- My Credentials 1** (highlighted with a red box and a green circle with '1')
- My Certification Cases 1** (highlighted with a red box and a green circle with '2')
- Downline Credentials
- My Status & Credentials
- Manage My Sales States

Current Status: Suspended -

2026 AEP Status:

- 2026 Recertification
- My Principal is Not

Credentials Table:

Type	Number of Active	Number of Expired
License	47	0
Training		
DOI	3	7

Hierarchy Change Request (CSB)

Requestor

- Click **START** to start the process of completing the contracting case.

My Certification Cases

Search by Names:

Creation Type	LoB	Type	Status	Email	NPN	Broker Type	Broker Sub Type	Sales Level	Name	Upline Name	Creation Date	Email Send Date
START	Individual	Cigna Supplemental Benefits	HCS OB	Created - New		7482622	Agency	Dual Assignment	AGENT III - 10		06/10/2025	06/10/2025

Showing 1 to 1 of 1 entries

First Previous 1 Next Last

- Enter the required contract details in the **Contact Info** section.
- Click **CONTINUE** to proceed to the next section.

My Certification Cases

Contact Info Payment Additional Info License Info Documents Submit

Primary Address Information

Address 1 *

Address 2

City *

State *

Zip Code *

Broker Information

Broker Type

Agency

CONTINUE



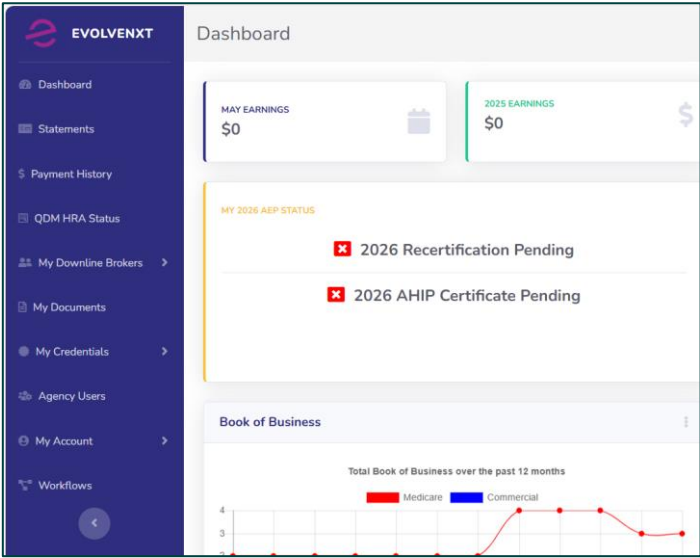
Note: Enter the required details into each tab of the contracting case and click Submit.

Submit a Hierarchy Change Request (CSB)

Hierarchy Change Request (CSB)

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.



Workflows

Status: -- Type: --

SEARCH

Show 10 entries Search:

Type	Status	Requestor	Approver	Execution Date	Last Updated
View / Cancel Hierarchy - CSB	Approved: Pending Contract			2025-08-20	05/22/2025 02:42 AM PDT
View Hierarchy - CSB	Approved			2025-08-16	05/18/2025 10:13 AM PDT

Showing 1 to 2 of 2 entries

Previous 1 Next

Sales Level Change Request (CSB)

Hierarchy Change Request (CSB)

Sales Level Change Request

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

1. Log in to the HFB, select **Contracting**, and click **My Downline Brokers** from the left panel. It will expand.
2. Click **Broker Hierarchies** to view the Medicare hierarchy list.

The screenshot shows the EVOLVENXT dashboard. On the left sidebar, the 'My Downline Brokers' menu item is highlighted with a red box and a green circle with the number '1'. Below it, the 'Broker Hierarchies' sub-item is also highlighted with a red box and a green circle with the number '2'. The main dashboard area shows a 'Status' tab selected, with 'Current Status' as 'Active/Certified' and '2026 AEP Status' showing two red alerts: '2026 Recertification Pending' and 'My Principal is Not AEP Ready'. Below this is a 'Credentials' table.

Type	Number of Active	Number of Expired	Status
License	13	0	All Valid
Training			Inactive
DOI	0		Inactive

Hierarchy Change Request (CSB)

Sales Level Change Request

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

EVOLVENXT

Broker Hierarchies

Rep Name Rep NPN Sub Type

Sales Level Next Name Next NPN

SEARCH **DOWNLOAD**

3

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.

EVOLVENXT

Broker Hierarchies

Rep Name Rep NPN Sub Type

Sales Level Next Name Next NPN

SEARCH **DOWNLOAD**

Show 10 entries

Rep Name	NPN	Start Date	End Date	Sales Level	Next Update	Assigned Comp Name	Sub Type	Rep Type
...	...	...	...	01 - Agent	...	...	Downline Only	External Broker
...	...	...	...	01 - Agent	...	...	Downline Only	External Broker
...	...	...	...	01 - Agent	...	...	Downline Only	External Broker
...	...	...	...	01 - Agent	...	...	Dual Assignment	External Broker
...	...	...	...	01 - Agent	...	...	Licensed Only Agent	External Broker
...	...	...	...	01 - Agent	...	...	Downline Only	External Broker
...	...	...	...	01 - Agent	...	...	Downline Only	External Broker
...	...	...	...	01 - Agent	...	...	Downline Only	External Broker
...	...	...	...	01 - Agent	...	...	Downline Only	External Broker
...	...	...	...	10 - GA	...	...	Downline Only	Agency

CHANGE

4

Hierarchy Change Request (CSB)

Sales Level Change Request

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

The screenshot shows a web form titled "Hierarchy Change Request (CSB)". At the top, there are two tables. The first table has columns "Rep NPN", "Rep Name", "Rep Type", and "Current Sub Type". The second table has columns "Current Next Upline Broker/Agency", "Current Commission Assign", "Start Date", and "End Date". Below these tables is a section titled "Producer Type and Hierarchy Management". It contains a dropdown menu labeled "Hierarchy Change Options" with the option "Request Sales Level Change" selected. A red box highlights the "Request Sales Level Change" option, and a red circle with the number "5" is next to it.

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

The screenshot shows the same web form as above. In the "Producer Type and Hierarchy Management" section, the "Hierarchy Change Options" dropdown is still set to "Request Sales Level Change". Below it is a "Next Upline" field with a "SEARCH" button. A red box highlights the "SEARCH" button, and a red circle with the number "6" is next to it.

Hierarchy Change Request (CSB)

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.

New Next Upline Search

Upline Name Upline NPN **Search**

	Rep Name	Rep NPN
SELECT		
SELECT		
SELECT		
SELECT		
SELECT		

Hierarchy Change Request (CSB)

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.

Producer Hierarchies

Rep NPN	Rep Name	Rep Type	Current Sub Type
		Agency	Downline Only

Current Next Upline Broker/Agency	Current Commission Assign	Start Date	End Date
		02/01/2024	

Producer Type and Hierarchy Management

Hierarchy Change Options
Request Sales Level Change

Next Upline **SEARCH**

Sales Level

Add a comment to this workflow request:

File **BROWSE**

UPDATE

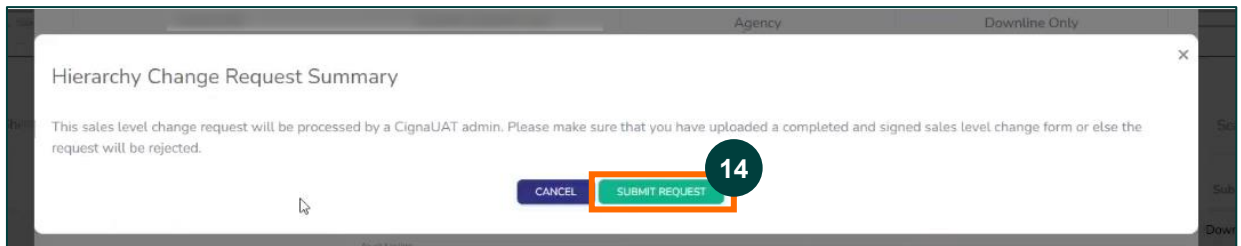
sales level change form

Please note: Sales level change requests will be reviewed and processed by a Cigna sales level change form

Hierarchy Change Request (CSB)

Sales Level Change Request

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



Advance Level Change Request (CSB)

Hierarchy Change Request (CSB)

Advance Level Change Request

Follow the steps given below to request an advance level change:

1. Log in to HFB and click **My Account** from the left panel to expand it.
2. Click **My CSB Hierarchy Info** to view the CSB hierarchy list.

The screenshot shows the HFB interface. On the left, the 'My Account' menu is expanded, with 'My CSB Hierarchy Info' highlighted. A red circle with the number '1' is around 'My Account', and a red circle with the number '2' is around 'My CSB Hierarchy Info'. The main content area shows a 'Credentials' table with the following data:

Type	Number of Active	Number of Expired	Status
License	2	2	Attention
Training			Inactive
DOI	0	5	Attention

3. Click **CHANGE CSB** to begin the process of raising an advance level change request.

The screenshot shows the 'My CSB Hierarchy Info' page. A red circle with the number '3' is around the 'CHANGE CSB' button. The table below shows the hierarchy information:

LOB	Rep	NPN	Writing ID	Company	Market Code	Start Date	End Date	Sales Level	Upline Name	Assigned Comp Name	Sub Type	Advanced Level	Rep Type
MSUP						09/11/2023		04 - AGENT VI			Downline Only	12 months	External Broker
SHL						05/20/2022		10 - AGENT III			Downline Only	12 months	External Broker
MSUP						05/20/2022		04 - AGENT VI			Downline Only	12 months	External Broker
MSUP						05/20/2022		04 - AGENT			Downline Only	12 months	External Broker

Hierarchy Change Request (CSB)

Advance Level Change Request

4. Select the **Request Advance Level Change** option from the **Hierarchy Change Options** dropdown.

The screenshot shows a web form titled "Producer Type and Hierarchy Management". At the top, there are two tables. The first table has columns: "Rep NPN", "Rep Name", "Rep Type", and "Current Sub Type". The second table has columns: "Current Next Upline Broker/Agency" and "Current Commission Assign". Below these tables is a "Hierarchy Change Options" dropdown menu. The dropdown is open, showing two options: "Request Hierarchy Change" and "Request Advance Level Change". The "Request Advance Level Change" option is highlighted with an orange border and a green circle with the number 4 next to it.

5. Click the **SHL Months Advance** dropdown and select the required SHL advanced level. In this example, we have selected **9** months.
6. Click the **MSUP Months Advance** dropdown and select the required MSUP advanced level. In this example, we have selected **15** months.
7. Click **UPDATE** to update the advanced level.

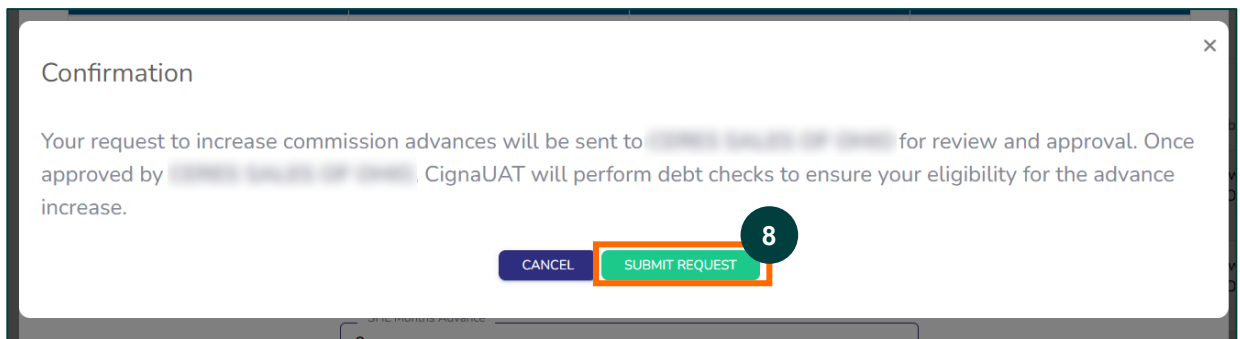
The screenshot shows the same web form as before, but now the "Request Advance Level Change" option is selected in the "Hierarchy Change Options" dropdown (marked with a green circle 5). Below this, the "SHL Months Advance" dropdown is set to "9" (marked with a green circle 6) and the "MSUP Months Advance" dropdown is set to "15" (marked with a green circle 7). At the bottom of the form, there is a blue "UPDATE" button, which is highlighted with an orange border and a green circle with the number 7 next to it.

Hierarchy Change Request (CSB)

Advance Level Change Request

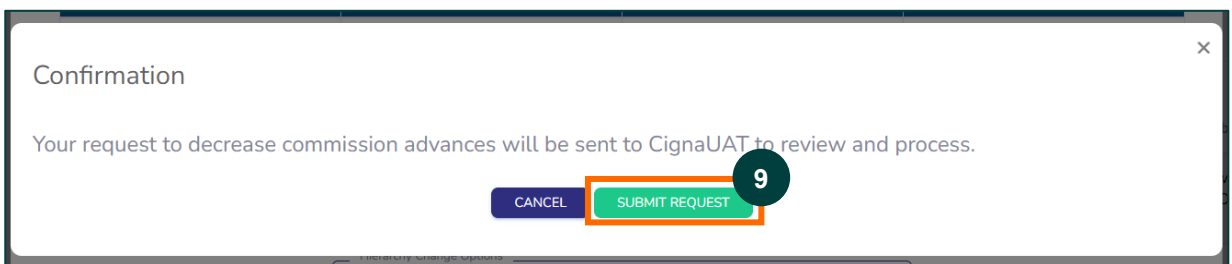
In case of an increase in the advanced level request:

8. Click **SUBMIT REQUEST** in the confirmation pop-up that appears to send the advance level change request. Once the request is sent and approved, debt checks will be performed to ensure eligibility for the advance increase.



In case of a decrease in the advanced level request:

9. Click **SUBMIT REQUEST** in the confirmation pop-up that appears to send the advance level change request. In this case, no approval is required, and the request will directly move to CignaUAT in the CSB Review Queue for approval.



Hierarchy Change Request (CSB)

Advance Level Change Request

- Once the request is submitted, it will be available in the **Workflows** with status as **Pending**.

The screenshot displays the EVOLVENXT Workflows interface. The left sidebar contains navigation links: Dashboard, Statements, Payment History, HRA Status, My Downline Brokers, My Documents, My Credentials, Agency Users, My Account, and Workflows. The Workflows section is highlighted with a green circle containing the number 10. The main content area shows a table of workflows with columns: Type, Status, Requestor, Approver, Execution Date, and Last Updated. The first row, 'Advance Level Change - CSB' with status 'Pending', is highlighted with an orange border. The second row is 'Advance Level Change - CSB' with status 'Cancelled', and the third row is 'Advance Level Change - CSB' with status 'Approved'. The table also includes a 'View / Cancel' link for the first row and a 'View' link for the second and third rows. The bottom of the table shows 'Showing 1 to 3 of 3 entries' and pagination controls for 'Previous', '1', and 'Next'.

Type	Status	Requestor	Approver	Execution Date	Last Updated
Advance Level Change - CSB	Pending			2025-05-30	05/30/2025 03:30 AM PDT
Advance Level Change - CSB	Cancelled			2025-05-27	05/27/2025 12:28 PM PDT
Advance Level Change - CSB	Approved			2025-05-27	05/27/2025 12:21 PM PDT

Thank You!



HCSC

Health Care Service Corporation, a Mutual Legal Reserve Company