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1.1 Dashboard

When you log into the Portal, you are directed straight to your dashboard

Dashboard JUSTIN DOHERTY

Ready To Sell

Credentials	Number of Expired	Status
License	1	Attention
Training		All Valid
DOI		All Valid

[View Details](#) [Download Details](#)

Quick Links

More Links

Link	Description
Products	Health Plan - Products by State
International Products	International Products and Services
Jobs Portal	Career Page Health Plan Corporation

Birthdays 0

[View Details](#)

Commercial Book of Business

Total Book of Business over time within the past 12 months

Month	Total Book of Business
Feb	10
Mar	10
Apr	10
May	13
Jun	11
Jul	9
Aug	11
Sep	13
Oct	10
Nov	10
Dec	9

Medicare Book of Business

Total Book of Business over time within the past 12 months

Month	Total Book of Business
Feb	35
Mar	35
Apr	35
May	34
Jun	34
Jul	34
Aug	33
Sep	34
Oct	34
Nov	34
Dec	34

New Enrollments

Newly enrolled members within the past 12 months

Month	Newly Enrolled Members
Feb	85
Mar	75
Apr	85
May	85
Jun	60
Jul	95
Aug	50
Sep	65
Oct	40
Nov	10

Commissions

Commission Totals for the past 12 months

Month	Commission Total
Feb	\$150.00
Mar	\$220.00
Apr	\$220.00
May	\$280.00
Jun	\$280.00
Jul	\$240.00
Aug	\$150.00
Sep	\$280.00
Oct	\$220.00
Nov	\$220.00
Dec	\$200.00

Click on your name in the top right to **Logout**

New Enrollments

Graphical representation of new enrollments over the past 12 months



Quick Links

Important or helpful URL links to access quickly

Quick Links	
More Links	
Link	Description
Miramar Agent	Miramar Agent
Plan Documents and Enrollments	Plan Documents and Enrollments
Broker FAQ	Broker FAQ

Ready to Sell

See what Licenses, DOI, and Training are valid or need attention

Ready To Sell		
Credentials	Number of Expired	Status
License	1	Attention
Training		All Valid
DOI		All Valid

View Details Download Details

Birthdays

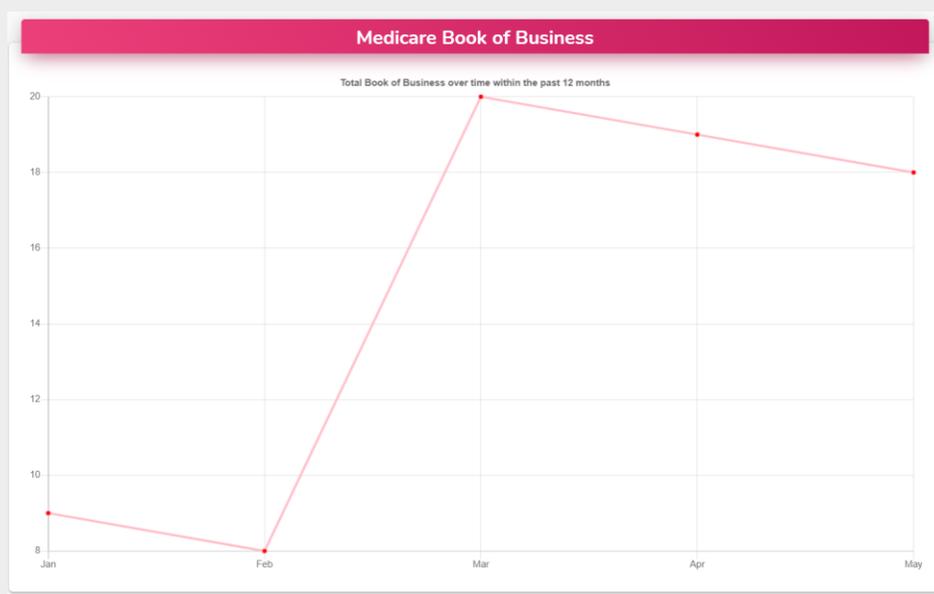
View Member Birthdays occurring month to month

 Birthdays 0

View Details

Medicare Book of Business

Graphical representation of Medicare book of business within the last 12 months



Commercial Book of Business

Graphical representation of Commercial book of business within the last 12 months



Commissions

Graphical representation of Broker's earned commissions within the last 12 months



1.2 Statements

On the Navigation menu:

Statements

	Statement Number	Statement Date	Payee	Transactions	Credits	Debits	Balance	Amount	Check Date	Amount Paid
View	3201	01/01/2021	INSURANCE AGENCY LLC	22,620	\$60,037.00	\$0.00	\$0.00	\$60,037.00		0.00
View	3225	03/01/2021	INSURANCE AGENCY LLC	204	\$702.00	\$0.00	\$0.00	\$702.00		0.00

Showing 1 to 2 of 2 entries

FIRST PREVIOUS 1 NEXT LAST

Agencies can view their past commission statement. If they click **VIEW**:

Download	Statement Date	Statement Number	Credits	Debits	Balance	Total
PDF Detail	05/01/2021	205	\$1,301.00	\$0.00	\$0.00	\$1,301.00

Rep ID	Rep Name	Member ID	Member Name	Effective Date	Term Date	Amount
12345	Agent A Agent	Mem12345ID	Member 1	01/01/2021	04/30/2021	\$90.00
12345	Agent A Agent	Mem12345ID	Member 1	05/01/2021		\$224.00
12345	Agent A Agent	Mem12346ID	Member 1	05/01/2021		\$224.00
12345	Agent A Agent	Mem12347ID	Member 1	05/01/2021		\$539.00
12345	Agent A Agent	Mem12349ID	Member 1	05/01/2021		\$224.00

1.3 Book of Business

Agencies can view their book of business and search members. They can view member names, MBI numbers, Start and End dates and enrolled plans.

Search Members: is used to organize enrolled members for Medicare BoB

Search Policy: is used to organize enrolled members for Commercial BoB

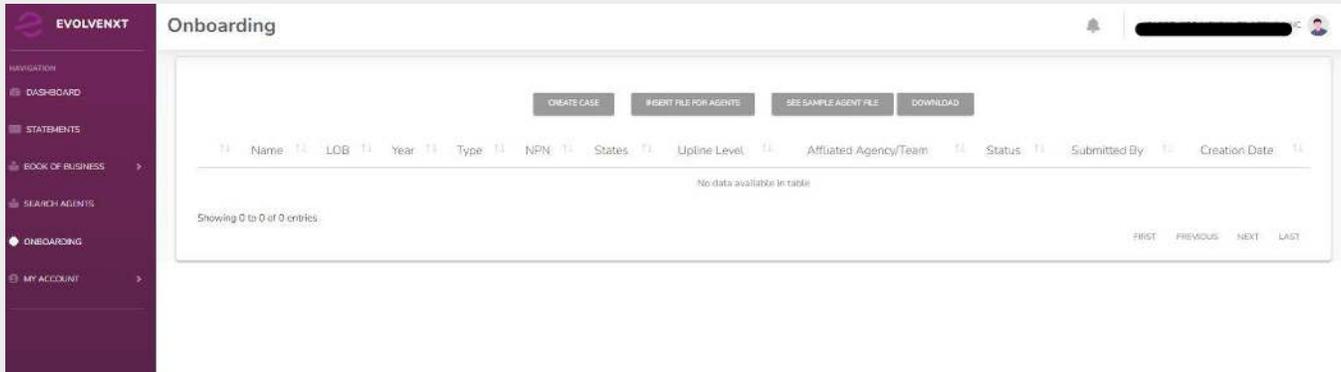
1.4 Search Agents

Here agencies can view all their down lined Agents and Agencies and see their:

- First and Last Name
- Start and End Dates
- Agent IDs
- Policy IDs

1.5 Onboarding

Here Agencies can view the status of all their onboarded cases and create new cases via a bulk upload file or create cases individually.

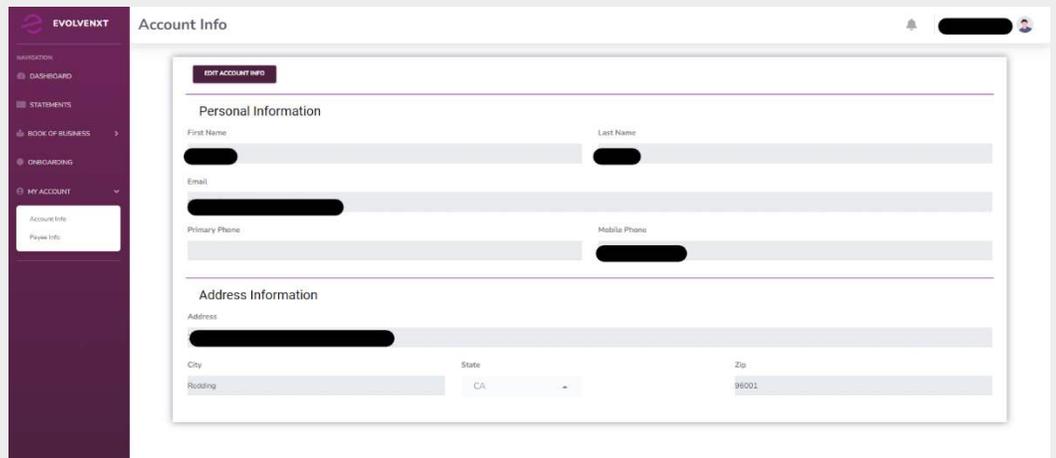


1.6 My Account

Under **Account Info** you can:

View your account information and update your:

- First and Last Name
- Email
- Address
- Phone Number



Under **Payee Info** you can:

- 1) Update your banking Information and banking type
- 2) Change payee name and address

EVOLVENXT Payee Info

EDIT PAYEE INFO

Name: [Redacted] Address: [Redacted]

City: [Redacted] State: [Redacted] Zip: [Redacted] SSN / TIN: [Redacted]

Show / Hide Information

EDIT BANKING INFO

Banking Method: ACH

Account Number: [Redacted] Verify Account Number: [Redacted] Routing Number: [Redacted]

Financial Institution: [Redacted] Account Type: CHECKING

Voided Check Upload: [Redacted]

Show / Hide Information