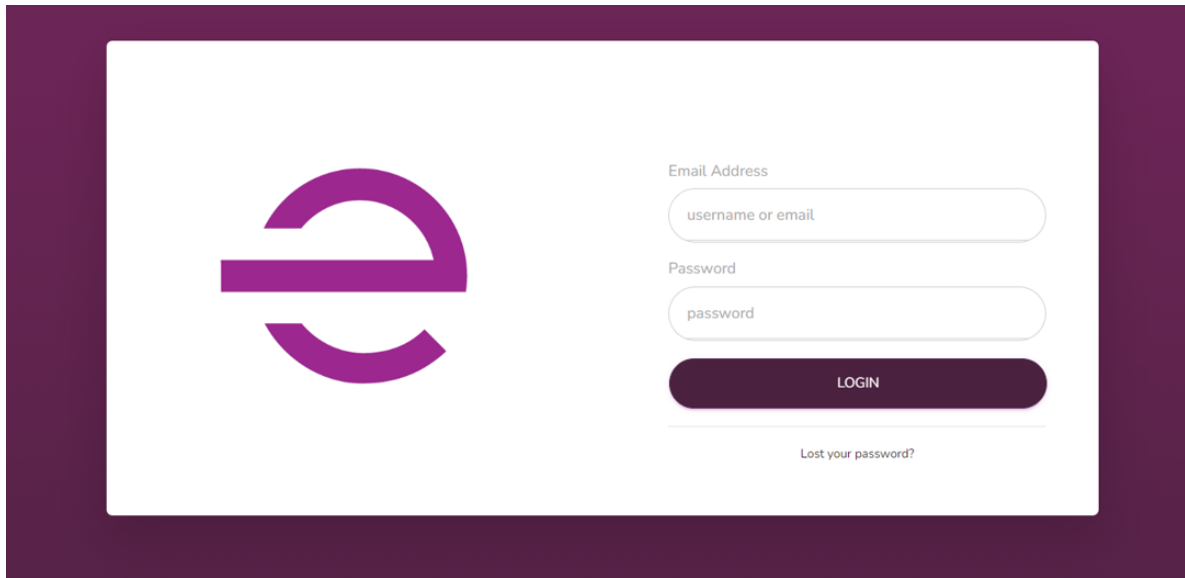


To begin the onboarding process email brokeronboarding@hometownhealth.com: send the agent/agency NPN, Email, and Product considering to sell (MA, Commercial or both).

A screenshot of the Evolve Portal login interface. On the left is a large purple logo consisting of a stylized 'e' with a horizontal bar. To the right of the logo are two input fields: 'Email Address' with the placeholder text 'username or email' and 'Password' with the placeholder text 'password'. Below these fields is a dark purple button labeled 'LOGIN'. At the bottom of the login area is a link that says 'Lost your password?'. The entire login form is set against a white background with a dark purple border.

EVOLVE PORTAL GUIDE

EVOLVE PORTAL

URL: <https://hth.evolverxt.com/login.htm>



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AGENT/AGENCY DASHBOARD

Quick Links

Helpful URL links to access quickly

Quick Links

More Links

Link	Description
Salesforce	Quoting System for commercial sales and renewals.
IFP-Rate-Grid	IFP-Rate-Grid
Benefits at a Glance	Benefits at a Glance

Commissions

Graphical View of commissions earned



Notifications

Click View Details to see messages

Notifications

View Details

My Downline's Credentials (Agency Only)

Graphical View of commission

My Downline's Credentials

Downline Status

0 Active/Certified | 0 Suspended

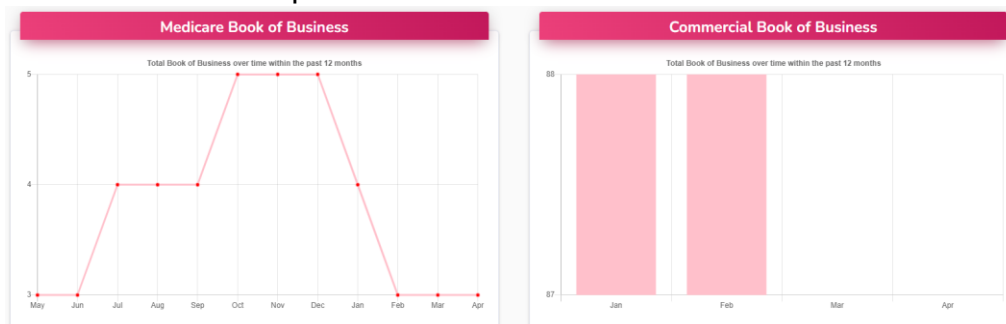
Downline Licenses

116 Active | 7 Inactive

View Details

Book of Business

Graphical View of MA and Commercial



Ready to Sell (Agency Only)

Displays what License, Training and DOI are valid or need attention

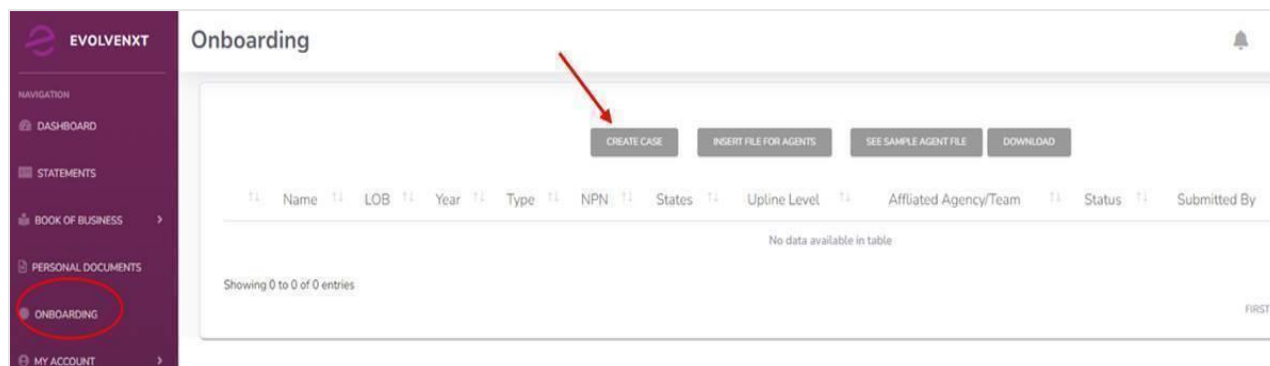
- Select Download Details > Excel report will generate > select the tabs to view

Ready To Sell		
Credentials	Number of Expired	Status
License	5	Attention
Training	18	Attention
DOI	0	All Valid
View Details		Download Details

ONBOARDING

AGENCY CREATING NEW ONBOARDING CASE

- Select ONBOARDING tab > CREATE CASE



- Complete fields accordingly (if LoB is MA select MA & COM)
- Sales Level: Agent 01, General Agency 10 or Master Agency 20
- Select LOA-commissions paid to Agency or Direct-commissions paid to agent

AN EMAIL NOTIFICATION IS SENT OUT TO THE AGENT/AGENCY WHEN A CASE IS CREATED.

- If you have an existing Evolve profile login with other carriers use current credentials

From: donotreply@evolgenxt.com <donotreply@evolgenxt.com>
Sent: Wednesday, April 6, 2022 12:21 PM
To: Test Testing <TestTesting@hometownhealth.com>
Subject: Evolve Agent Contracting Registration

Dear Test Testing,

Please use the link below in order to complete your contract and 2022 certification for Hometown Medicare Advantage and Commercial Group Plans.

URL: <https://hth.evolgenxt.com/login.htm>
 Login email address: Test.Testing@hometownhealth.com
 Password: C7A3897AD273

If you are unable to access the link above or have any questions regarding the process, please contact your upline agency, or Broker Onboarding at brokeronboarding@hometownhealth.com or call Hometown Health Broker Services at 775-982-3100.

Thank you!

ONBOARDING CASE STATUS

- Under ONBOARDING view Status
- If Approved a welcome RTS email notification will be sent

- If Denied or Incomplete an email notification will be sent to the agent

Email Example:

From: donotreply@evolgenxt.com <donotreply@evolgenxt.com>

Sent: Wednesday, April 27, 2022 3:40 PM

To: Test Testing <TestTesting@hometownhealth.com>

Subject: Hometown Health 2022 Contract and Certification Incomplete - Action Required

Dear Test Testing,

We are unable to complete your contract and 2022 certification at this time. Please see comment below in order to correct the information.

If you would like commissions to be paid directly to you, please enter banking information.

Otherwise, please disregard and resubmit. Thank you!

You will need to login to the portal in order to correct the information above.

URL: <https://hth.evolgenxt.com/login.htm>

If you are unable to access the link above or have any questions regarding the process, please contact your upline agency, or Broker Onboarding at brokeronboarding@hometownhealth.com or call Hometown Health Plan Broker Services at 775-982-3100.

Thank you!

STATEMENTS

- Select STATEMENTS in the navigation menu
- The arrows ↑↓ on each tab let you ascend/descend
- Statement can be uploaded as PDF or Excel-(this format will have more details)

BOOK OF BUSINESS

SEARCH MEMBERS (MA ONLY)

- Option to SEARCH by any field, and/or active/inactive members
- The arrows ↑↓ on each tab lets you ascend/descend
- Select DOWNLOAD to see report in an Excel format

Search Members

First Name Last Name Member ID

Effective From Effective To Rep NPN

Active Member ☐ Inactive Member ☐

SEARCH **DOWNLOAD**

Member ID ↑↓ First Name ↑↓ Last Name ↑↓ MBI Number ↑↓ Start Date

SEARCH POLICIES (COMMERCIAL)

- Option to SEARCH by any field
- The arrows ↑↓ on each tab lets you ascend/descend
- Select DOWNLOAD to see report in an Excel format

Search Policies

First Name Last Name Policy ID

Effective From Effective To

Show 10 entries

SEARCH **DOWNLOAD**

Policy ID ↑↓ First Name ↑↓ Last Name ↑↓ Product ↑↓ Start Date ↑↓

PERSONAL DOCUMENTS

- Select PERSONAL DOCUMENTS > SEARCH

Personal Documents

Document Type

Text Criteria

SEARCH

Insert Doc Name ↑↓ Description

- Select File Type > Browse > Upload

MY ACCOUNT

ACCOUNT INFO

- Select View/Edit to change/update your Personal & Business demographics > SAVE

PAYEE INFO

- Select View/Edit to update/change Payee or Banking information
- Click ☐ to Show/Hide information
- Select ACH and Upload Voided Check
- Click CANCEL EDIT or SEND CHANGE REQUEST

NEW TICKET

- Select Type > Enter Description > Select Priority > Upload Document > Enter Comment > CREATE

EVOLVENXT New Ticket

NAVIGATION

- DASHBOARD
- STATEMENTS
- BOOK OF BUSINESS
- PERSONAL DOCUMENTS
- ONBOARDING
- MY ACCOUNT
 - Account Info
 - Workflows
 - New Ticket**
 - Payee Info

Create Support Ticket

Type: --

Description:

Importance: LOW

Document Upload: **BROWSE**

Comment:

CREATE

WORKFLOWS (TICKETS IN QUE)

- Select Status or Type > Click SEARCH

EVOLVENXT Workflows

NAVIGATION

- DASHBOARD
- STATEMENTS
- BOOK OF BUSINESS
- PERSONAL DOCUMENTS
- ONBOARDING
- ACCESS CONFIGURATION
- MY ACCOUNT
 - Account Info
 - Workflows**
 - New Ticket
 - Payee Info

Workflows

Status: APPROVED -- Approved Denied Need To Respond Pending Response

Type: --

SEARCH

Type	Status	Importance	Date Created	Last Updated	Last Updated By
data available in table					

- Tickets submitted & Status will be displayed > Select Ticket to view comments

Type	Description	Status	Importance	Date Created	Last Updated
Ticket 8	Other Alert?	Pending Response	Low	04/29/2022 10:48 AM	04/29/2022 10:48 AM
Ticket 6	Issue With Payment Testing New Ticket	Pending Response	Normal	04/01/2022 03:59 PM	04/01/2022 03:59 PM

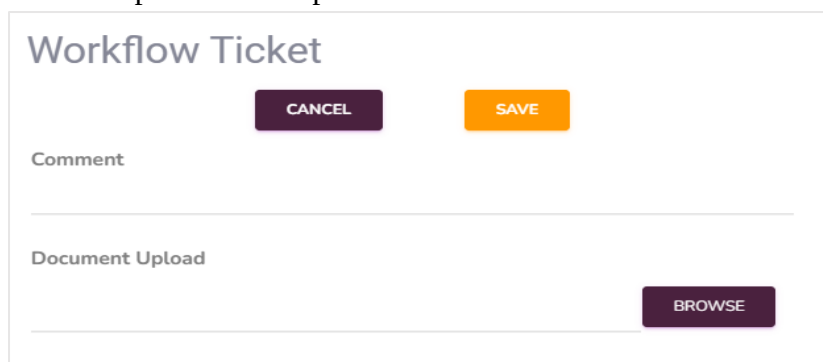
- Click RESPOND

Workflow Ticket

RESPOND

Comment	User	Date	File
Can you please email me 2021 1099	Test Testing	04/11/2022 09:48 AM	
Hi Test, I have sent an email to AP, please let me know if you receive your 1099 to close this ticket. Thank you! Monica Vazquez	Vazquez, Monica	04/28/2022 09:35 AM	

- Enter comments to respond and/or upload documents > Select SAVE



Workflow Ticket

CANCEL **SAVE**

Comment

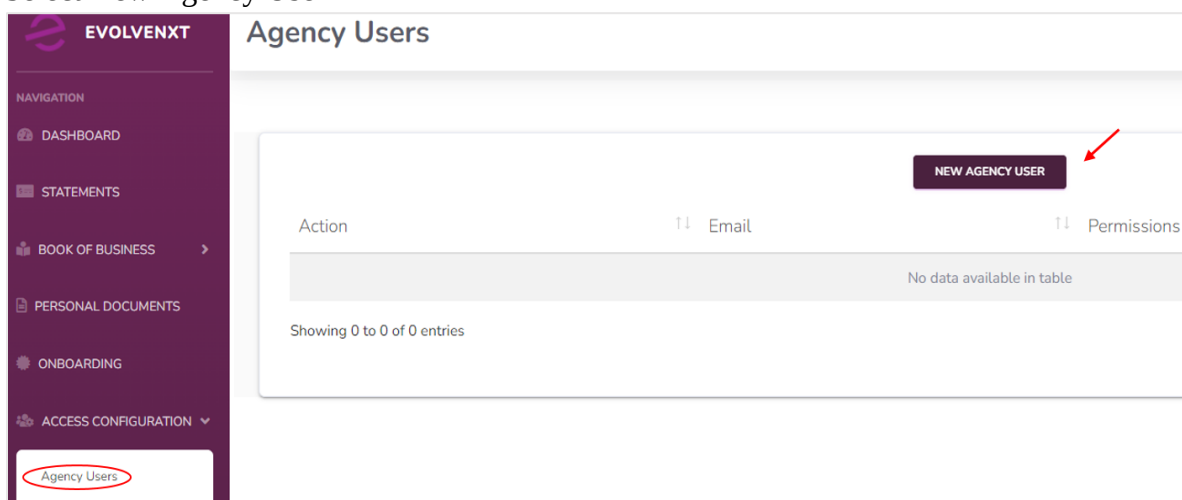
Document Upload

BROWSE

ACCESS CONFIGURATION

AGENCY USERS (FOR AGENCY ONLY)

- Select New Agency User



EVOLVENXT Agency Users

NAVIGATION

- DASHBOARD
- STATEMENTS
- BOOK OF BUSINESS
- PERSONAL DOCUMENTS
- ONBOARDING
- ACCESS CONFIGURATION

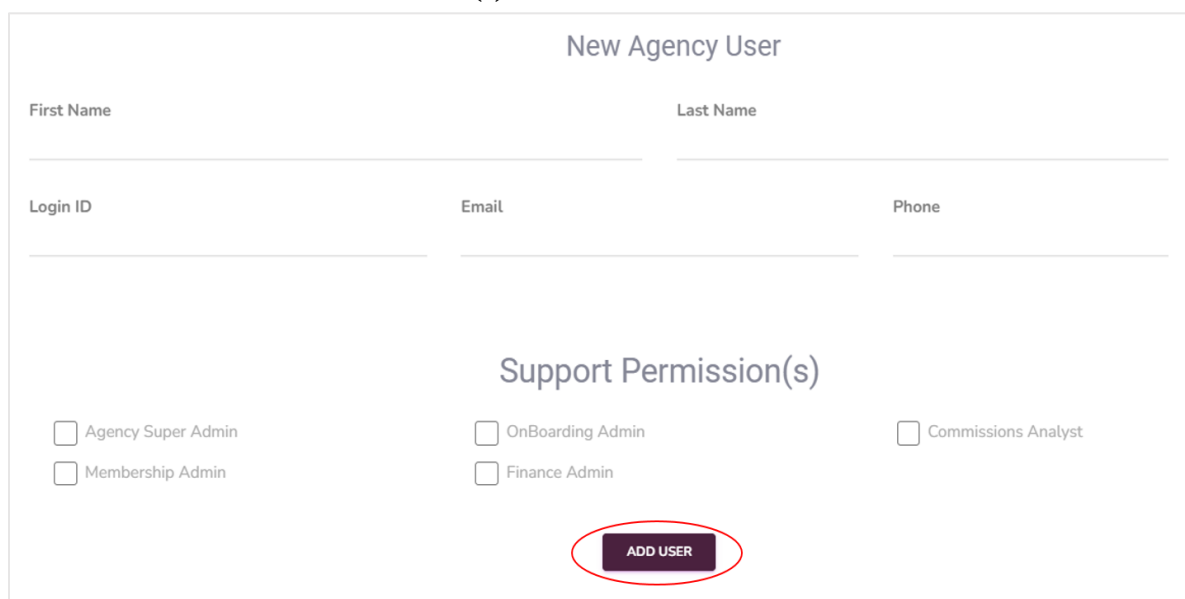
NEW AGENCY USER

Action	Email	Permissions
No data available in table		

Showing 0 to 0 of 0 entries

Agency Users

- Enter user's info> Select Permission(s) ☐ > click ADD USER



New Agency User

First Name Last Name

Login ID Email Phone

Support Permission(s)

☐ Agency Super Admin ☐ OnBoarding Admin ☐ Commissions Analyst

☐ Membership Admin ☐ Finance Admin

ADD USER

MANAGE MENU ACCESS

- Select View/ Update > Select Each Header to Grant Access to Group

EVOLVENXT Manage Menu Access

Header: NOTHING SELECTED Permission Group: NOTHING SELECTED

View/Update	Header	Menu	Permission Groups
View/Update	Dashboard	Dashboard	
View/Update	Statements	Statements	
View/Update	Book of Business	Search Members	
View/Update	Book of Business	Search Policies	
View/Update	Documents	Personal Documents	
View/Update	Certification	Onboarding	

- Select Access ☐ to grant Permission to Group

Dashboard | Dashboard

Show 10 entries

Access	Permission Group
☐	Agency Super Admin
☐	OnBoarding Admin
☐	Commissions Analyst
☐	Membership Admin
☐	Finance Admin

MANAGE MODULE ACCESS

- Select Edit > Select Each Header in Navigation Menu

EVOLVENXT Manage Module Access

NAVIGATION

- DASHBOARD
- STATEMENTS
- BOOK OF BUSINESS >
- PERSONAL DOCUMENTS
- ONBOARDING
- ACCESS CONFIGURATION ▾
 - Agency Users
 - Manage Menu Access
 - Manage Module Access**
 - Manage Shortcuts
 - Manage Account Config

Show 10 entries

	Navigation Name	Permission Groups
Edit	Home	
Edit	Portal	
Edit	Statements	
Edit	Documents	
Edit	Onboarding	
Edit	Tickets	
Edit	Access Configuration	

- Select Access ☐ to grant Permission to Group
- Home

Show 10 entries

Access	Permission Group
☐	Agency Super Admin
☐	OnBoarding Admin
☐	Commissions Analyst
☐	Membership Admin
☐	Finance Admin

***MANAGE SHORTCUTS**
(Not currently available)

***MANAGE ACCOUNT CONFIG.**
(Not currently available)