

Portal User Guide for Brokers

1. Navigate to <https://hth.evolvenxt.com/>

The screenshot shows the EVOLVENXT Dashboard. The left sidebar contains a menu with the following items: Dashboard, Statements, Book of Business, Docs & Resources, My Credentials, My Account, and Workflows. The main content area has three tabs: Overview (selected), Enrollments, and Statements. The Overview tab displays the following information:

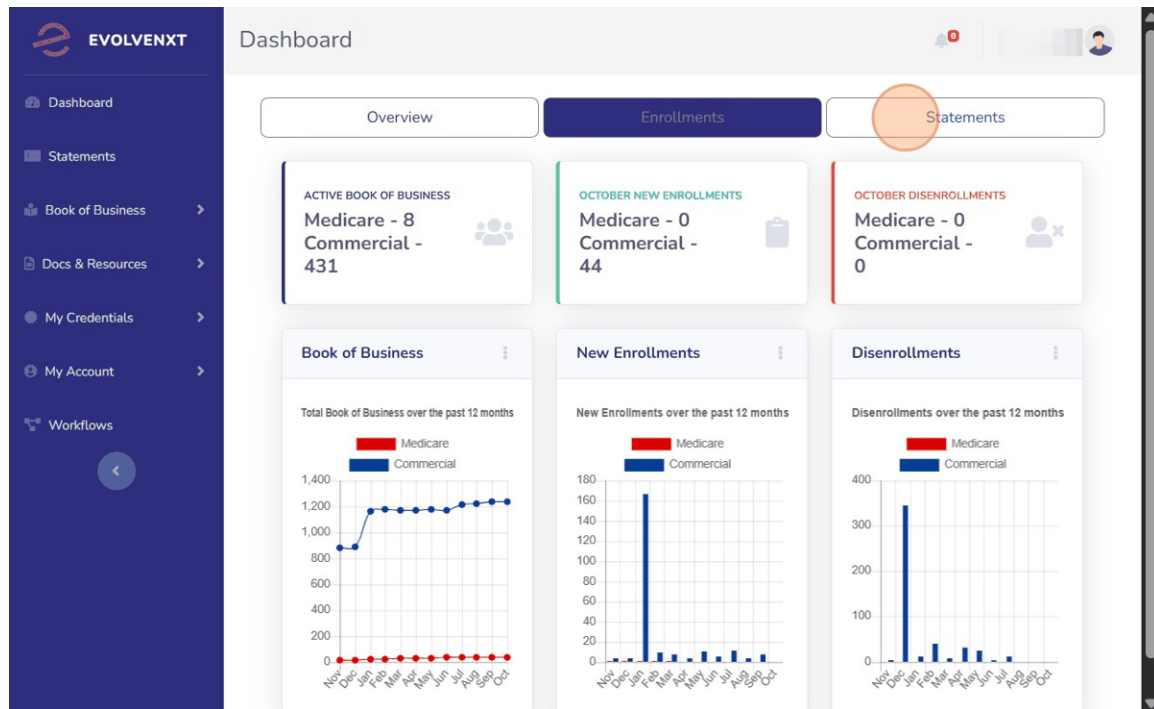
- Current Status:** Medicare Advantage - Active/Certified, Commercial - Active/Certified
- 2026 Status:** 2026 Recertification Approved, 2026 Training Certificate Completed
- Quick Links:** A link icon.
- Credentials Table:**

Type	Number of Active	Number of Expired	Status
License	1	0	All Valid
Training	2	2	All Valid
DOI	1	1	Attention

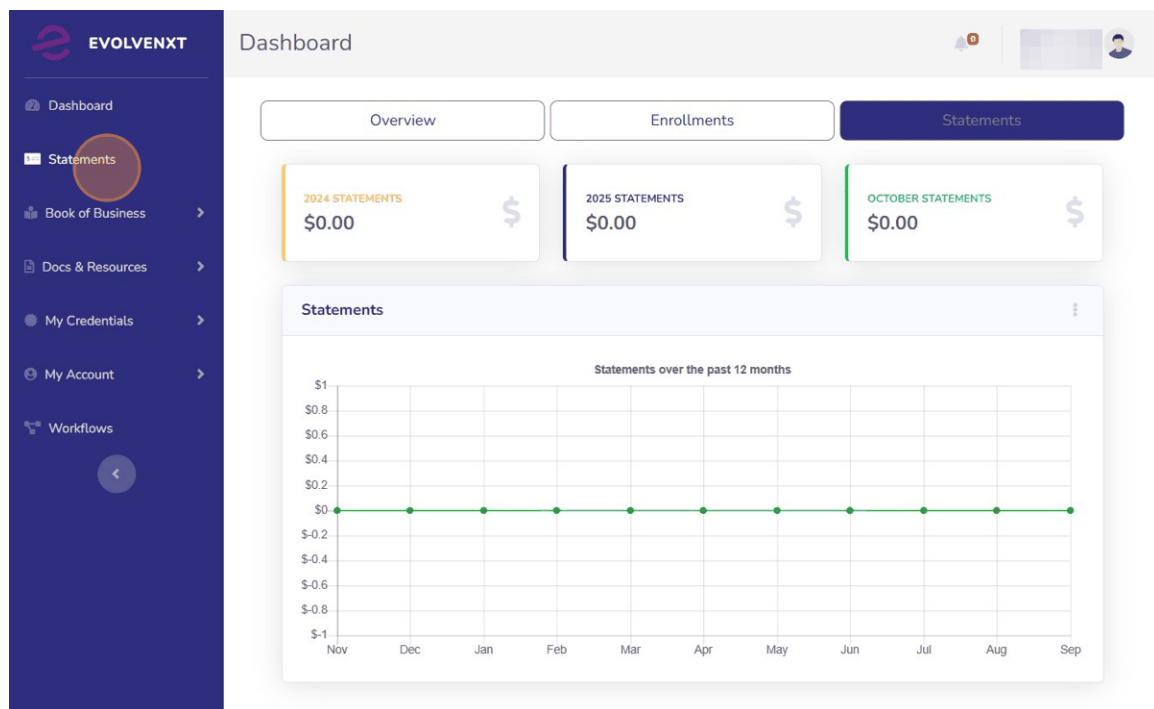
The three tabs of Overview ,Enrollments, and Statements will provide you general information about each subject. A more in depth explanation will be on the left side menu's.

The main "Overview" tab (see above) will provide more general info than the other tabs such as "status", "credentials", and more

2.



3. Click "Statements"



4. When navigating to statements click "search" to see a list of all of your statements.

The screenshot shows the EVOLVENXT interface. On the left is a dark blue sidebar with navigation links: Dashboard, Statements, Book of Business, Docs & Resources, My Credentials, My Account, and Workflows. The main area is titled "Statements" and contains two input fields labeled "Statement From *" and "Statement To *". Below these fields is a blue "SEARCH" button, which is highlighted with an orange circle.

5.

The screenshot shows the EVOLVENXT interface after a search. The "Book of Business" link in the sidebar is highlighted with an orange circle. The "SEARCH" button is also highlighted with an orange circle. Below the search fields, it says "Show 10 entries". A table displays the search results with the following columns: Stmt #, Description, Stmt Date, Payee, Credits, Debits, Balance, Amount, and Pmt Date. The table contains one entry for "Excel PDF" with a statement number of 1675, dated 01/01/2022, for a commission of \$71.75. At the bottom, it says "Showing 1 to 1 of 1 entries" and includes "Previous", "1", and "Next" navigation buttons.

Stmt #	Description	Stmt Date	Payee	Credits	Debits	Balance	Amount	Pmt Date
Excel PDF 1675	2022 Jan External commission	01/01/2022		\$71.75	\$0.00	\$0.00	\$71.75	

6. Select "Book of Business" under the "book of business" dropdown to view each of your members

EVOLVENXT

Dashboard

Statements

Book of Business

Book of Business

Search Groups

Search IFP Policies

Search GRP Policies

Docs & Resources

My Credentials

My Account

Workflows

Statements

Statement From *

Statement To *

SEARCH

Show 10 entries

Excel PDF	Stmt #	Description	Stmt Date	Payee	Credits	Debits	Balance	Amount	Pmt Date
	1675	2022 Jan External commission	01/01/2022		\$71.75	\$0.00	\$0.00	\$71.75	

Showing 1 to 1 of 1 entries

Previous 1 Next

- 7.

EVOLVENXT

Dashboard

Statements

Book of Business

Docs & Resources

My Credentials

My Account

Workflows

Book of Business

Member ID

First Name

Last Name

Member MBI

Active Member

Rep ID

Effective From

Effective To

Termination From

Termination To

SEARCH

Last Data Load - 10/20/2025 8:16 AM

8.

EVOLVENXT

Book of Business

Member ID First Name Last Name Member MBI Active Member Rep ID

Effective From Effective To Termination From Termination To

SEARCH DOWNLOAD Last Data Load - 10/20/2025 8:16 AM

Show 10 entries Search:

Member ID	MBI	First Name	Last Name	Phone	Effective Date	Termination Date	Contract	PI
	*****KD63	KENNETH			01/01/2024		H2960	
	*****CF43	JULIE			01/01/2024		H2960	
	*****NC19	MERLE			01/01/2024		H2960	
	*****YQ01	MARIA			06/01/2025		H2960	
	*****QT87	ROBERT			01/01/2025		H2960	
	*****DR62	LORI			03/01/2025		H2960	
	*****FQ28	RAEJEAN			02/01/2025		H2960	
	*****YX03	ADELE	TARANTINO		04/01/2025		H2960	

The rest of the tabs under "Book of Business" will allow you to view your Groups, IFP Policies, and Group Policies.

9.

EVOLVENXT

Book of Business

Member ID First Name Last Name Member MBI Active Member Rep ID

Effective From Effective To Termination From Termination To

SEARCH DOWNLOAD Last Data Load - 10/20/2025 8:16 AM

Show 10 entries Search:

Book of Business

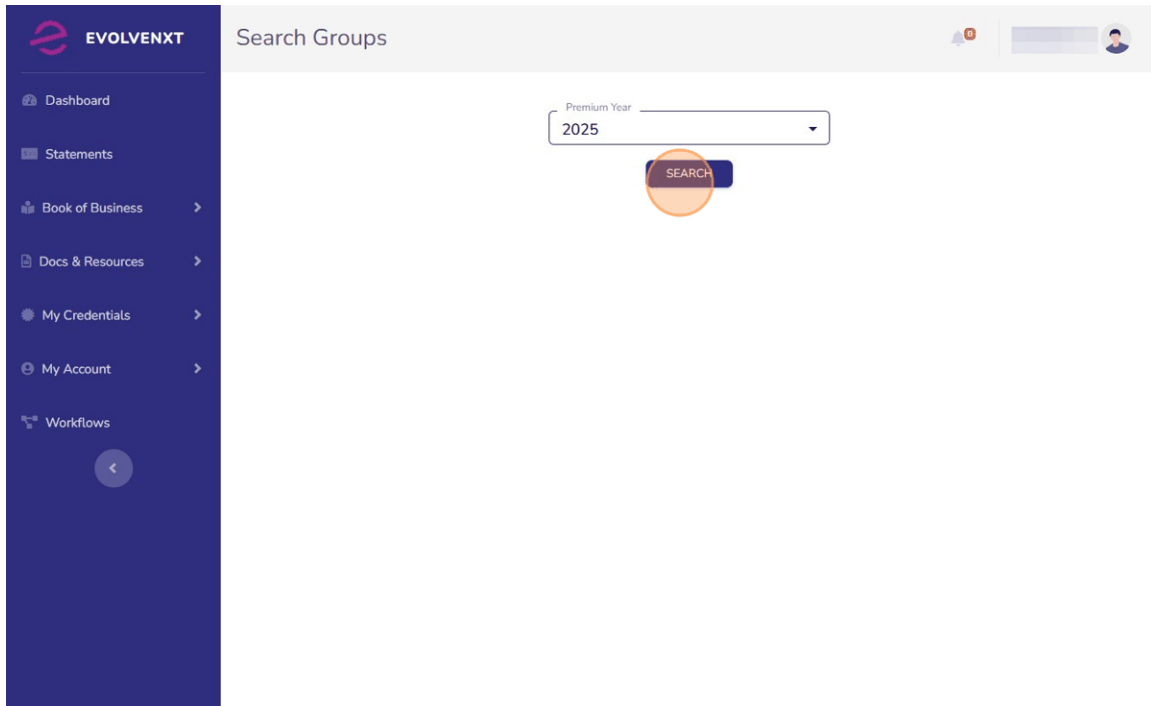
Search Groups

Search IFP Policies

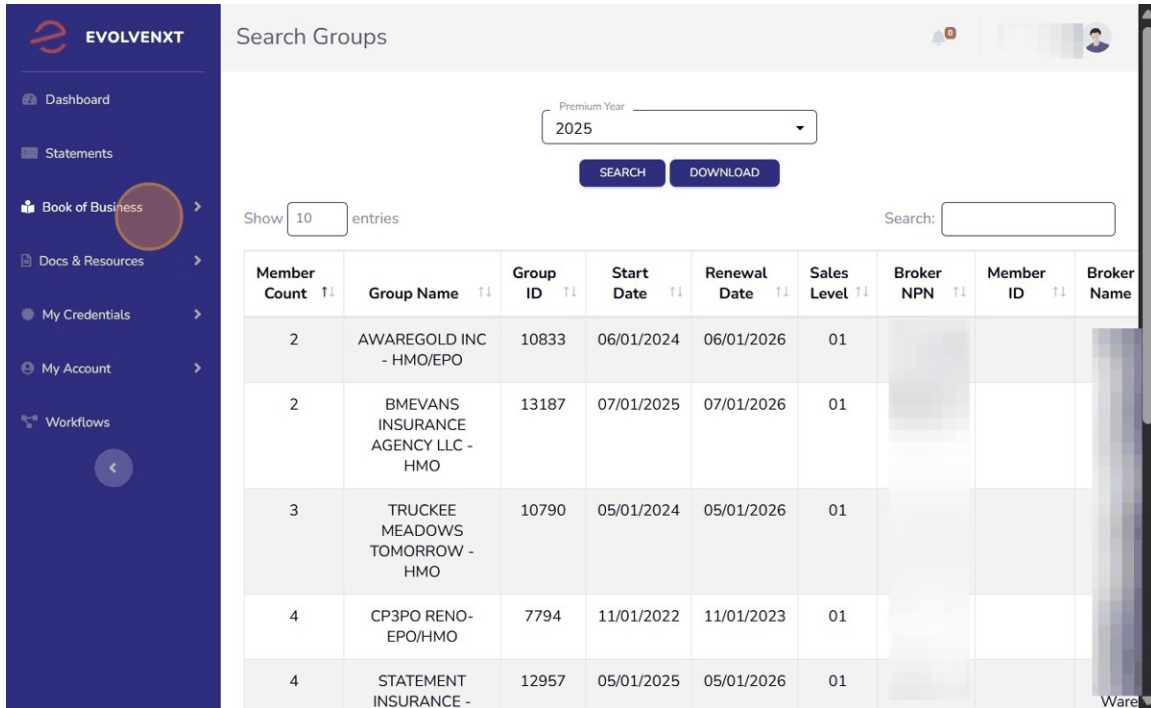
Search GRP Policies

Member ID	MBI	First Name	Last Name	Phone	Effective Date	Termination Date	Contract	PI
	*****KD63	KENNETH	JOHNSONJR		01/01/2024		H2960	
	*****CF43	JULIE	BONOMO		01/01/2024		H2960	
	*****NC19	MERLE	FULTZ		01/01/2024		H2960	
	*****YQ01	MARIA	BRUGGINK		06/01/2025		H2960	
	*****QT87	ROBERT	HOWARD		01/01/2025		H2960	
	*****DR62	LORI	HEILBRONN		03/01/2025		H2960	
	*****FQ28	RAEJEAN	CRAIG		02/01/2025		H2960	
	*****YX03	ADELE	TARANTINO		04/01/2025		H2960	

10.



11.



12.

EVOLVENXT

Search Groups

Premium Year: 2025

SEARCH DOWNLOAD

Show 10 entries

Search:

Member Count	Group Name	Group ID	Start Date	Renewal Date	Sales Level	Broker NPN	Member ID	Broker Name
2	AWAREGOLD INC - HMO/EPO	10833	06/01/2024	06/01/2026	01			
2	BMEVANS INSURANCE AGENCY LLC - HMO	13187	07/01/2025	07/01/2026	01			
3	TRUCKEE MEADOWS TOMORROW - HMO	10790	05/01/2024	05/01/2026	01			
4	CP3PO RENO-EPO/HMO	7794	11/01/2022	11/01/2023	01			
4	STATEMENT INSURANCE -	12957	05/01/2025	05/01/2026	01			

13.

EVOLVENXT

Search IFP Policies

First Name: Last Name: Policy ID: Group ID:

Agent ID: Effective From: Effective To: Status: --

SEARCH

14.

EVOLVENXT

Search IFP Policies

First Name Last Name Policy ID Group ID

Agent ID Effective From Effective To Status

Show entries Search:

Policy ID	First Name	Last Name	Product	Start Date	End Date	Group	Agent ID	Agent Name
	Michele	Cifelli	IFP OFFX	09/01/2025		5800329 - IFP R2 SILVER HMO PLUS-OFF EXCHANGE		
	Candice	Oneida	IFP ONX	09/01/2025		14740137 - IFP R2 R3 SILVER 70 HMO D0320 94%-ON EXCHANGE		
	Michael	Pantazis	IFP ONX	09/01/2025		14740138 - IFP R2 R3		

15.

EVOLVENXT

Search IFP Policies

First Name Last Name Policy ID Group ID

Agent ID Effective From Effective To Status

Show entries Search:

Policy ID	First Name	Last Name	Product	Start Date	End Date	Group	Agent ID	Agent Name
	Michele	Cifelli	IFP OFFX	09/01/2025		5800329 - IFP R2 SILVER HMO PLUS-OFF EXCHANGE		
	Candice	Oneida	IFP ONX	09/01/2025		14740137 - IFP R2 R3 SILVER 70 HMO D0320 94%-ON EXCHANGE		
	Michael	Pantazis	IFP ONX	09/01/2025		14740138 - IFP R2 R3		

16.

EVOLVENXT

Search GRP Policies

First Name Last Name Policy ID Group ID

Agent ID Effective From Effective To Status

SEARCH

17. Select "Docs & Resources"

EVOLVENXT

Search GRP Policies

First Name Last Name Policy ID Group ID

Agent ID Effective From Effective To Status

SEARCH **DOWNLOAD**

Show entries Search:

Policy ID	First Name	Last Name	Product	Start Date	End Date	Group	Agent ID	Agent Name
1	William	McGregor	AHP SGP	09/01/2025		37801 - DUNAGAN ENGINEERING		
1	LARRY	BECKER	SGP	08/01/2025		8264 - TRUCKEE MEADOWS PEST CONTROL-EPO		
1	Jacob	Chandler	SGP	08/01/2025		8264 - TRUCKEE MEADOWS PEST CONTROL-EPO		

18. Select "Shared Resources"

EVOLVENXT

Search GRP Policies

First Name Last Name Policy ID Group ID

Agent ID Effective From Effective To Status

Show entries

Search:

Policy ID	First Name	Last Name	Product	Start Date	End Date	Group	Agent ID	Agent Name
	William		AHP SGP	09/01/2025		37801 - DUNAGAN ENGINEERING		
	LARRY		SGP	08/01/2025		8264 - TRUCKEE MEADOWS PEST CONTROL-EPO		
	Jacob		SGP	08/01/2025		8264 - TRUCKEE MEADOWS PEST CONTROL-EPO		

19. This will show you and documentation that has been shared to you by your health plan

EVOLVENXT

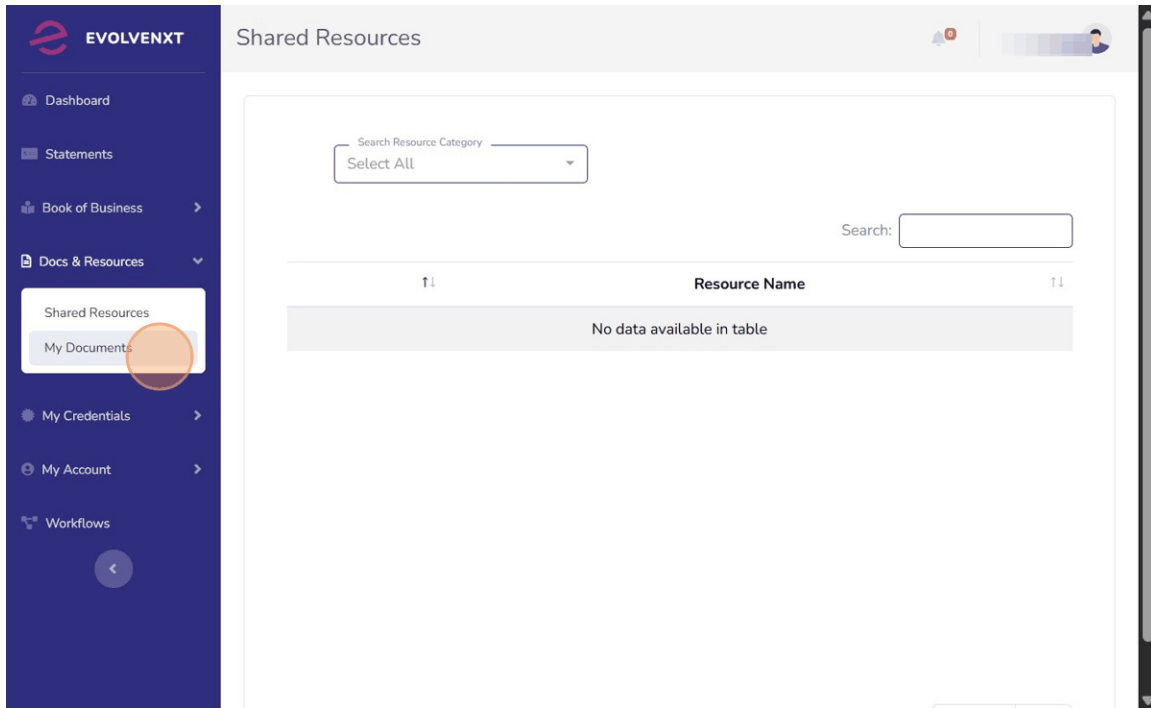
Shared Resources

Search Resource Category

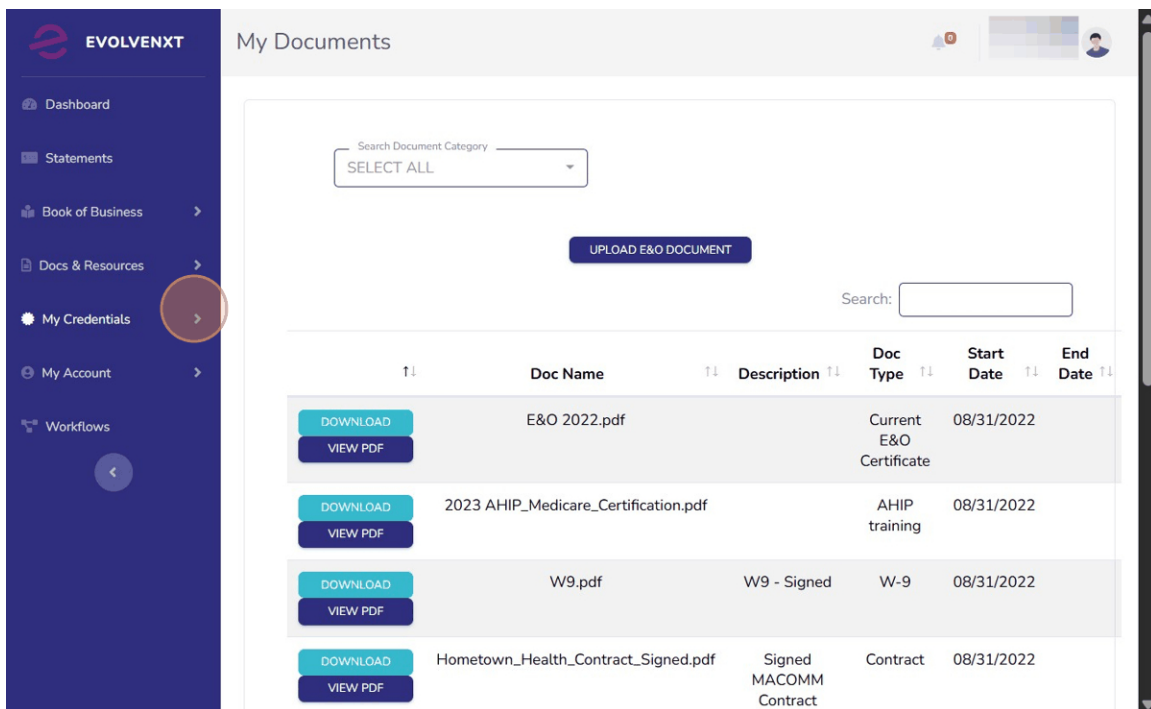
Search:

Resource Name
No data available in table

20. Click "My Documents"



21. This will show you any documents you uploaded during the onboarding process such as your W9 or AHIP Cert.



22. Select "My Credentials"> "My Certification Cases"

My Documents

Search Document Category:

[UPLOAD E&O DOCUMENT](#)

Search:

	Doc Name	Description	Doc Type	Start Date	End Date
DOWNLOAD VIEW PDF	E&O 2022.pdf		Current E&O Certificate	08/31/2022	
DOWNLOAD VIEW PDF	2023 AHIP_Medicare_Certification.pdf		AHIP training	08/31/2022	
DOWNLOAD VIEW PDF	W9.pdf	W9 - Signed	W-9	08/31/2022	
DOWNLOAD VIEW PDF	Hometown_Health_Contract_Signed.pdf	Signed MACOMM Contract	Contract	08/31/2022	

23. This area will show you you're onboarding cases and any recertification cases that may need to be completed in future for ach Line of Business you are looking to sell for Hometown Health.

My Certification Cases

Search by Name:

Name	LOB	Year	Type	NPN	States	Upline Level	Affiliated Agency/Team	Status	Creation Date
	MA & Comm	2026	Recertify		NV	Agent	Awaregold Inc	Approved	08/26/2
	MA & Comm	2025	Recertify		NV	Agent	Awaregold Inc	Approved	08/14/2
	MA & Comm	2024	Recertify		NV	Agent	Awaregold Inc	Approved	08/03/2
	MA & Comm	2023	Recertify		NV	Agent	Awaregold Inc	Approved	08/18/2

Showing 1 to 4 of 4 entries

First Previous **1** Next Last

24. "My Status & Credentials"

EVOLVENXT

My Certification Cases

Search by Name:

Name	LOB	Year	Type	NPN	States	Upline Level	Affiliated Agency/Team	Status	Creation Date
	MA & Comm	2026	Recertify		NV	Agent	Awaregold Inc	Approved	08/26/2
	MA & Comm	2025	Recertify		NV	Agent	Awaregold Inc	Approved	08/14/2
	MA & Comm	2024	Recertify		NV	Agent	Awaregold Inc	Approved	08/03/2
	MA & Comm	2023	Recertify		NV	Agent	Awaregold Inc	Approved	08/18/2

Showing 1 to 4 of 4 entries

First Previous 1 Next Last

"My Status and Credentials" will show you each individual piece of individual information needed for you to be ready to sell. Click amongst the tabs to see if all of the necessary pieces are up to date and uploaded.

25.

EVOLVENXT

My Status & Credentials

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

LOB	Active Contract	Active Training	Active State License	Rep Status
MA	Yes	Yes	Yes	Active/Certified
COMM	Yes	-	Yes	Active/Certified

Showing 1 to 2 of 2 entries

First Previous 1 Next Last

26.

- Dashboard
- Statements
- Book of Business
- Docs & Resources
- My Credentials
- My Account
- Workflows

My Status & Credentials

My Status Info

Sales States & Licenses

Training Info

Contract Info

Appointment Info

The below table lists the Line of Business and states where you have declared sales intent, as well as your license status in each of those states. You can declare additional sales states in Manage My Licenses.

Search:

LOB	State	Resident	License Number	License Class Name	LOA Name	Start Date	End Date	License Status	State Status
COMM	NV	Yes		Res Producer/Producer Firm	Health	03-23-2015	03-31-2027	Active	Active
COMM	NV	Yes		Res Producer/Producer Firm	Health	03-23-2015	03-31-2027	Active	Active
COMM	NV	Yes		Res Producer/Producer Firm	Health	03-23-2015	03-31-2027	Active	Active
COMM	NV	Yes		Res Producer/Producer Firm	Health	03-23-2015	03-31-2027	Active	Active

27.

- Dashboard
- Statements
- Book of Business
- Docs & Resources
- My Credentials
- My Account
- Workflows

My Status & Credentials

My Status Info

Sales States & Licenses

Training Info

Contract Info

Appointment Info

Search:

Training Year	Training Name	Start Date	End Date	Training Progress
2026	Hometown Medicare Broker Training	09/03/2025	12/31/2026	94.44
2025	Hometown Medicare Broker Training	09/24/2024	12/31/2025	100.00
2024	Hometown Medicare Broker Training	08/18/2023	12/31/2024	95.83
2023	Hometown Medicare Broker Training	08/31/2022	12/31/2023	95.83

Showing 1 to 4 of 4 entries

Previous

1

Next

28.

EVOLVENXT

Dashboard

Statements

Book of Business

Docs & Resources

My Credentials

My Account

Workflows

My Status & Credentials

My Status Info

Sales States & Licenses

Training Info

Contract Info

Appointment Info

Search:

Contract Year	Start Date	End Date	Contract Status
2023	08/31/2022	12/31/2023	Signed
2024	08/22/2023	12/31/2024	Recertify
2025	09/26/2024		Recertify Complete
2026	09/04/2025		Recertify Complete

Showing 1 to 4 of 4 entries

Previous1Next

29.

EVOLVENXT

Dashboard

Statements

Book of Business

Docs & Resources

My Credentials

My Account

Workflows

My Status & Credentials

My Status Info

Sales States & Licenses

Training Info

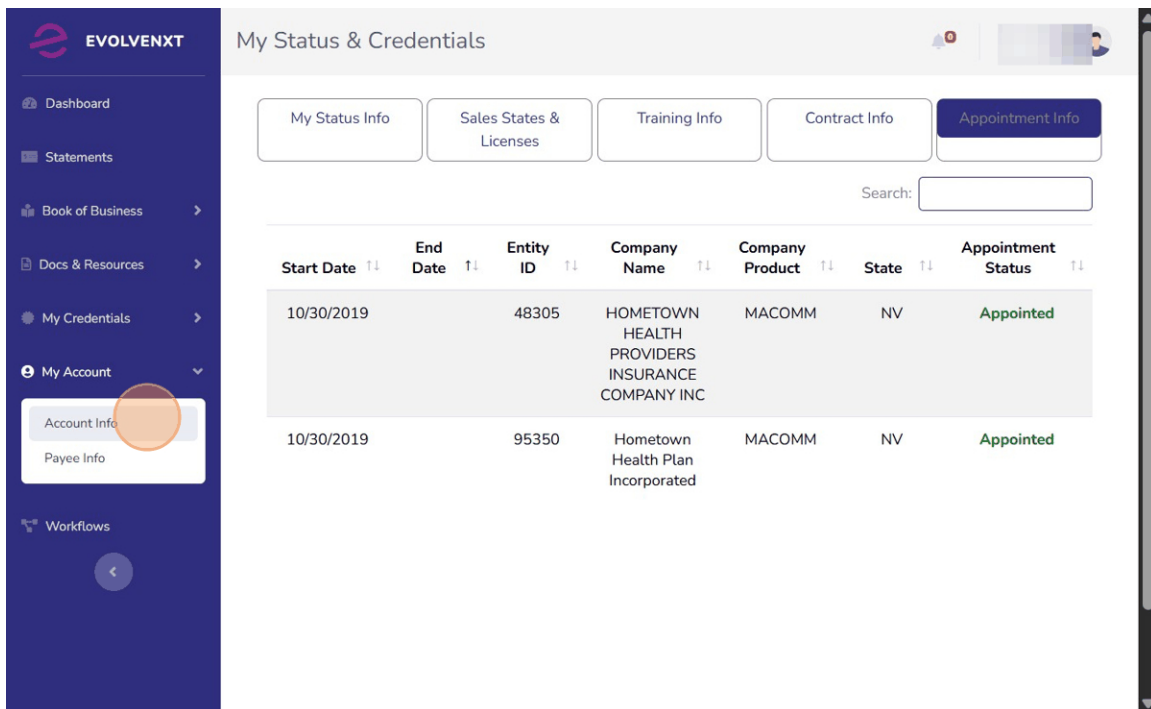
Contract Info

Appointment Info

Search:

Start Date	End Date	Entity ID	Company Name	Company Product	State	Appointment Status
10/30/2019		48305	HOMETOWN HEALTH PROVIDERS INSURANCE COMPANY INC	MACOMM	NV	Appointed
10/30/2019		95350	Hometown Health Plan Incorporated	MACOMM	NV	Appointed

30. Select "My Account"> "Account Info"



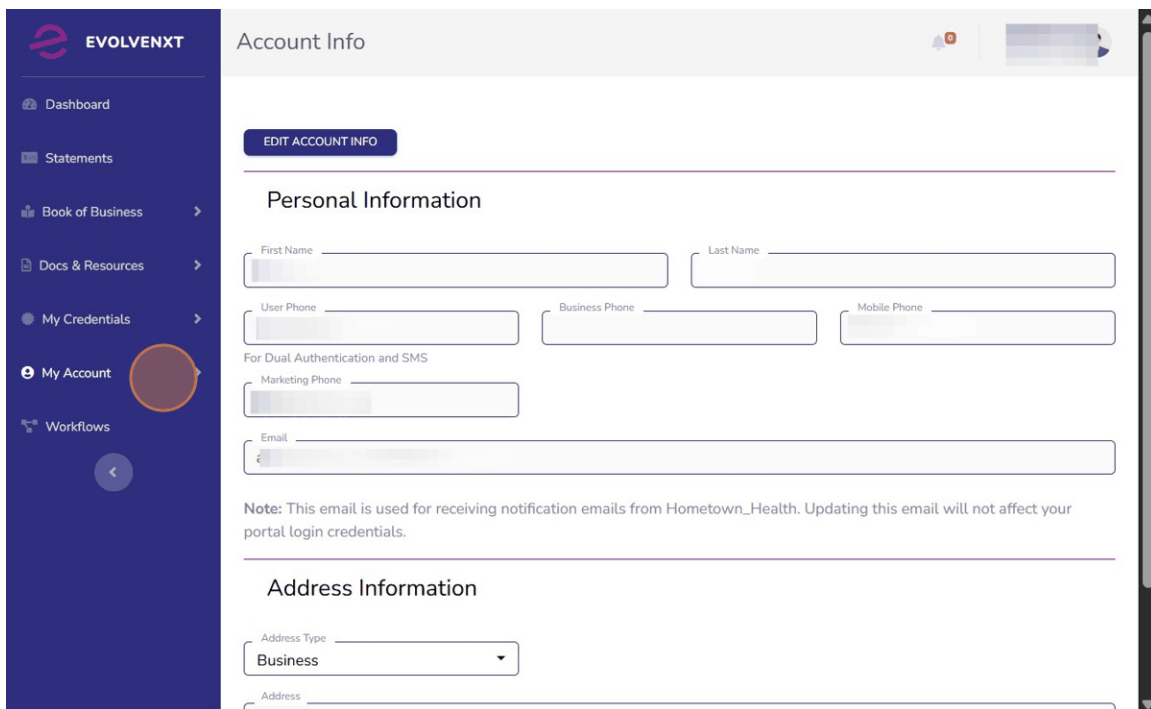
My Status & Credentials

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

Search:

Start Date	End Date	Entity ID	Company Name	Company Product	State	Appointment Status
10/30/2019		48305	HOMETOWN HEALTH PROVIDERS INSURANCE COMPANY INC	MACOMM	NV	Appointed
10/30/2019		95350	Hometown Health Plan Incorporated	MACOMM	NV	Appointed

31. This will show you the personal information you filled out during the Onboarding Process.



Account Info

EDIT ACCOUNT INFO

Personal Information

First Name Last Name

User Phone Business Phone Mobile Phone

For Dual Authentication and SMS

Marketing Phone

Email

Note: This email is used for receiving notification emails from Hometown_Health. Updating this email will not affect your portal login credentials.

Address Information

Address Type Business

Address

32. Select "Payee Info" to see your banking information

EVOLVENXT

Account Info

[EDIT ACCOUNT INFO](#)

Personal Information

First Name Last Name

User Phone Business Phone Mobile Phone

For Dual Authentication and SMS

Marketing Phone

Email

Note: This email is used for receiving notification emails from Hometown_Health. Updating this email will not affect your portal login credentials.

Address Information

Address Type

Address

33.

EVOLVENXT

Payee Info

[EDIT PAYEE INFO](#)

Note: Your payee address will be used for shipping documents such as the 1099 form and paper checks (where applicable).

Name Address

City State Zip SSN / TIN

Fed Tax Class Other Tax Code

☒ Hide Information

[EDIT BANKING INFO](#)

Banking Method

Account Number Verify Account Number Routing Number

Financial Institution Account Type

☒ Hide Information