

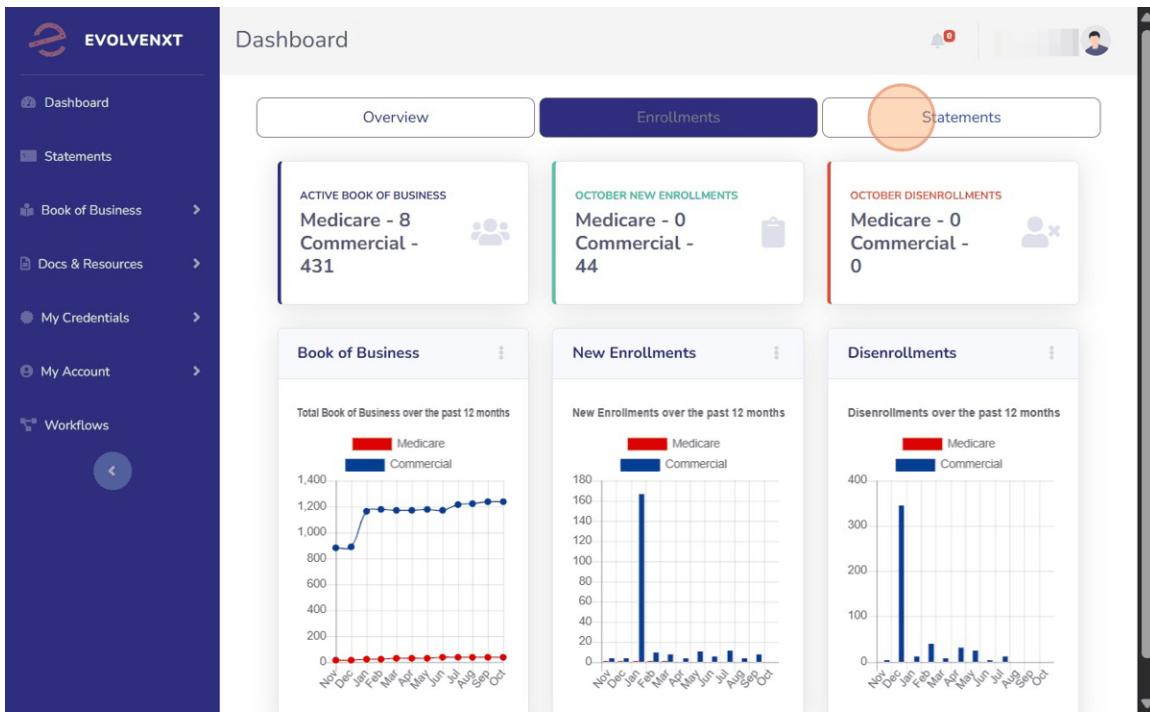
Portal User Guide for Brokers

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

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.

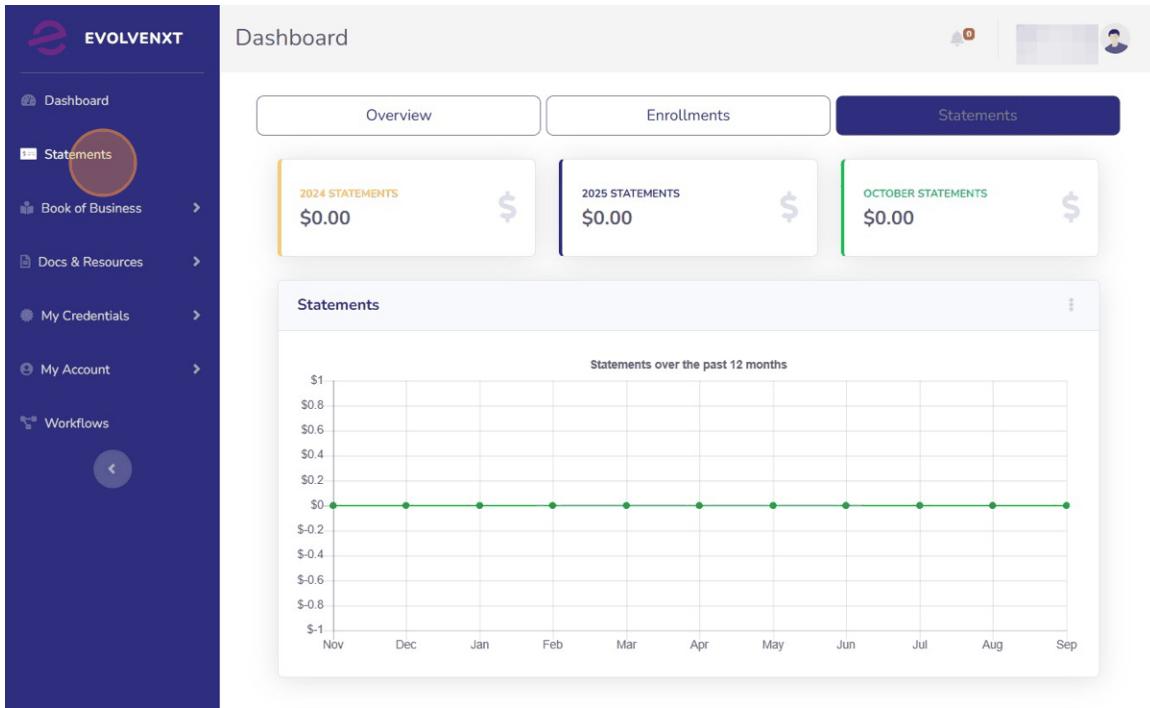
The main "Overview" tab (see above) will provide more general info than the other tabs such as "status", "credentials", and more

2.



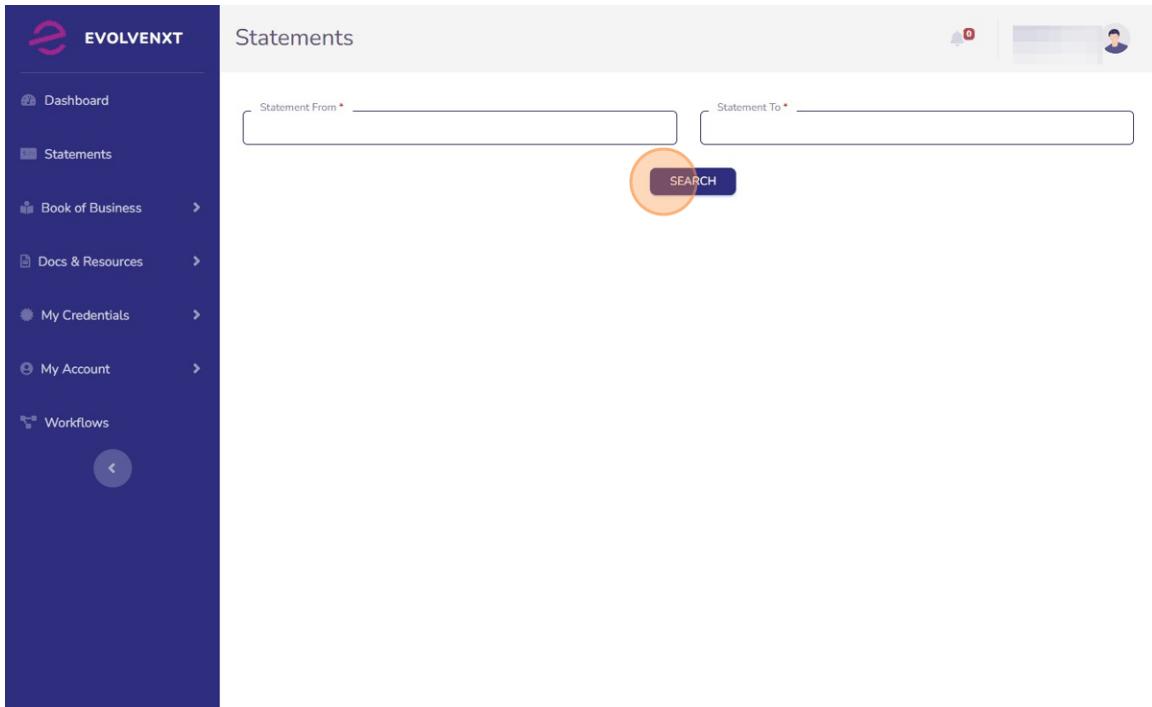
The screenshot shows the Evolvenxt dashboard with the "Statements" tab selected. The left sidebar includes links for Dashboard, Statements (which is highlighted with an orange circle), Book of Business, Docs & Resources, My Credentials, My Account, and Workflows. The main content area has three cards: "ACTIVE BOOK OF BUSINESS" (Medicare - 8, Commercial - 431), "OCTOBER NEW ENROLLMENTS" (Medicare - 0, Commercial - 44), and "OCTOBER DISENROLLMENTS" (Medicare - 0, Commercial - 0). Below these are three charts: "Book of Business" (line chart showing a steady increase from Nov to Oct), "New Enrollments" (bar chart showing a single high value in Oct), and "Disenrollments" (bar chart showing a single high value in Oct).

3. Click "Statements"

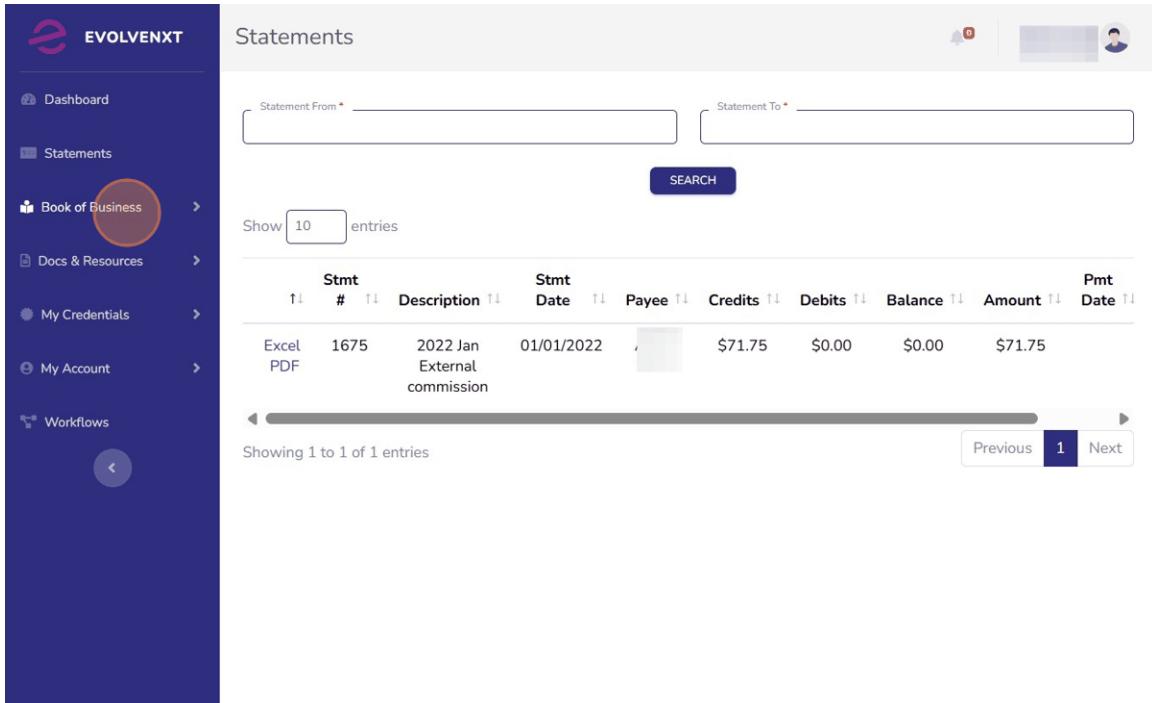


The screenshot shows the Evolvenxt dashboard with the "Statements" tab selected. The left sidebar includes links for Dashboard (which is highlighted with an orange circle), Statements, Book of Business, Docs & Resources, My Credentials, My Account, and Workflows. The main content area has three cards: "2024 STATEMENTS" (\$0.00), "2025 STATEMENTS" (\$0.00), and "OCTOBER STATEMENTS" (\$0.00). Below these is a chart titled "Statements over the past 12 months" showing a flat line at \$0.00 from November to September.

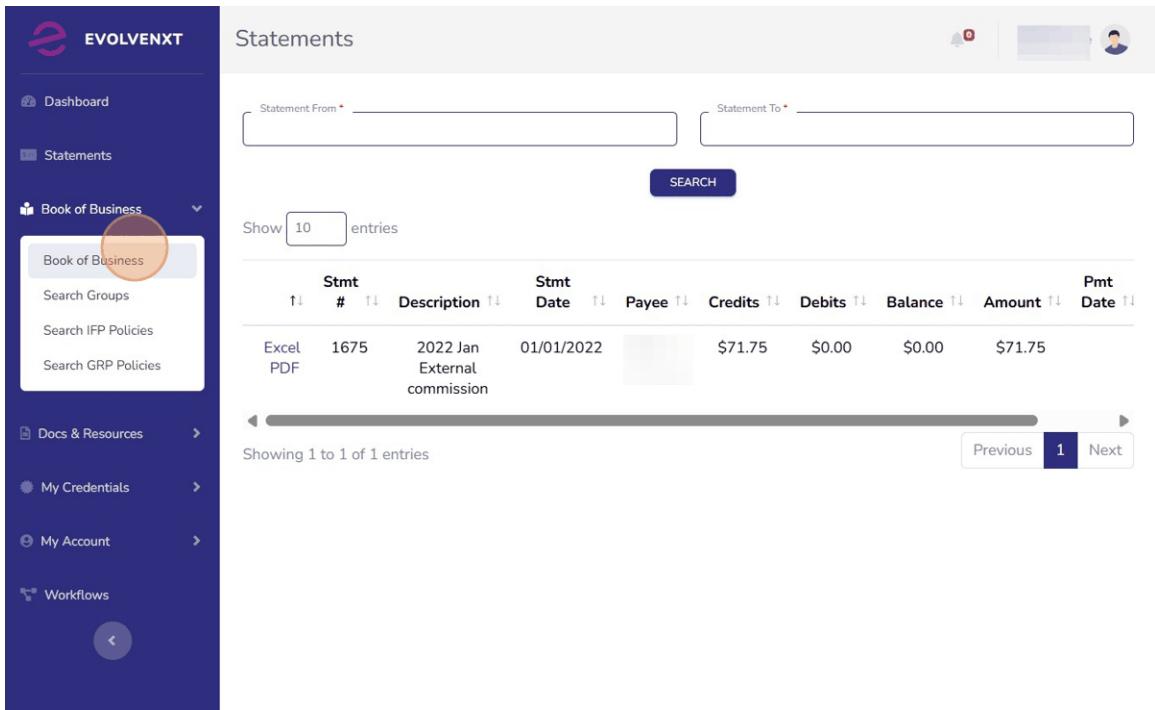
4. When navigating to statements click "search" to see a list of all of your statements.



5.

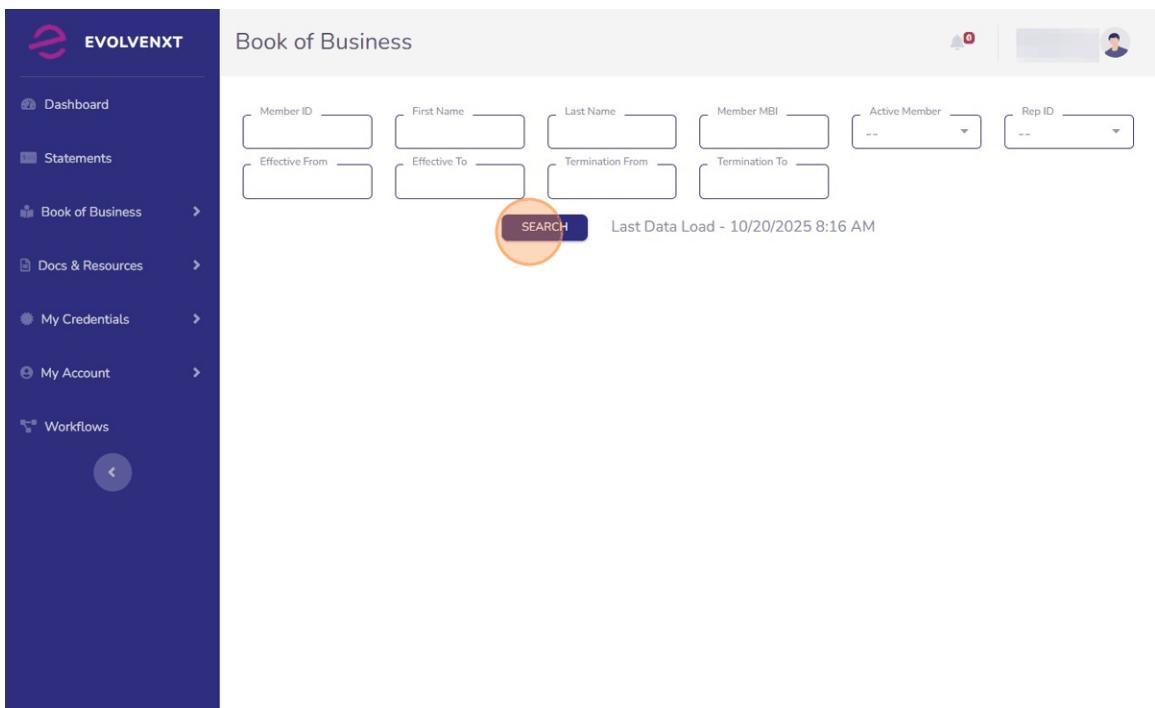


6. Select "Book of Business" under the "book of business" dropdown to view each of your members



The screenshot shows the EVOLVENXT interface. On the left, a sidebar menu includes 'Dashboard', 'Statements', 'Book of Business' (which is highlighted with an orange circle), 'Search Groups', 'Search IFP Policies', 'Search GRP Policies', 'Docs & Resources', 'My Credentials', 'My Account', and 'Workflows'. The main content area is titled 'Statements' and shows a table of statements. The table has columns: Stmt, #, Description, Stmt Date, Payee, Credits, Debits, Balance, Amount, Pmt Date. One entry is listed: Excel PDF, 1675, 2022 Jan External commission, Stmt Date 01/01/2022, Payee \$71.75, Credits \$0.00, Debits \$0.00, Balance \$0.00, Amount \$71.75, Pmt Date. Below the table, it says 'Showing 1 to 1 of 1 entries'. Navigation buttons 'Previous' and 'Next' are shown, with '1' in the middle.

7.



The screenshot shows the EVOLVENXT interface. On the left, a sidebar menu includes 'Dashboard', 'Statements', 'Book of Business' (which is highlighted with an orange circle), 'Docs & Resources', 'My Credentials', 'My Account', and 'Workflows'. The main content area is titled 'Book of Business' and shows a search form with fields: Member ID, First Name, Last Name, Member MBI, Active Member, Rep ID, Effective From, Effective To, Termination From, Termination To. A 'SEARCH' button is highlighted with an orange circle. Below the form, it says 'Last Data Load - 10/20/2025 8:16 AM'.

8.

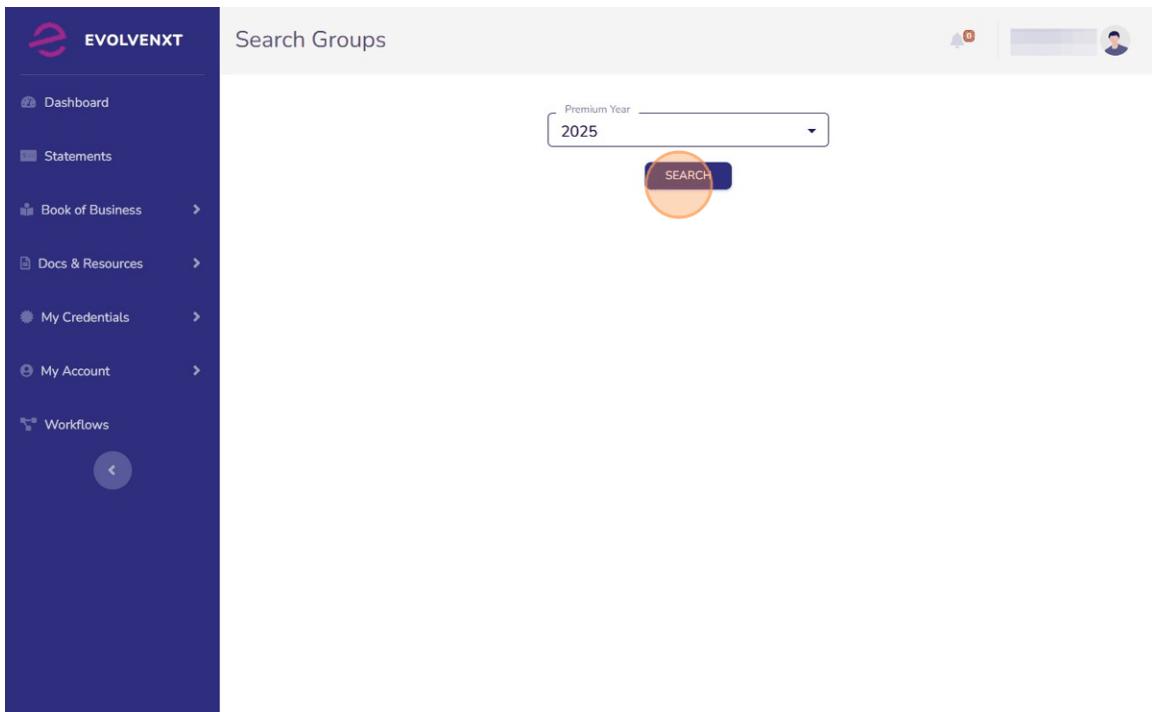
Member ID	MBI	First Name	Last Name	Phone	Effective Date	Termination Date	Contract	Policy
*****KD63	KENNETH				01/01/2024		H2960	
*****CF43	JULIE				01/01/2024		H2960	
*****NC19	MERLE				01/01/2024		H2960	
*****YQ01	MARIA				06/01/2025		H2960	
*****QT87	ROBERT				01/01/2025		H2960	
*****DR62	LORI				03/01/2025		H2960	
*****FQ28	RAEJEAN				02/01/2025		H2960	
CO0052051	*****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.

Member ID	MBI	First Name	Last Name	Phone	Effective Date	Termination Date	Contract	Policy
*****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.

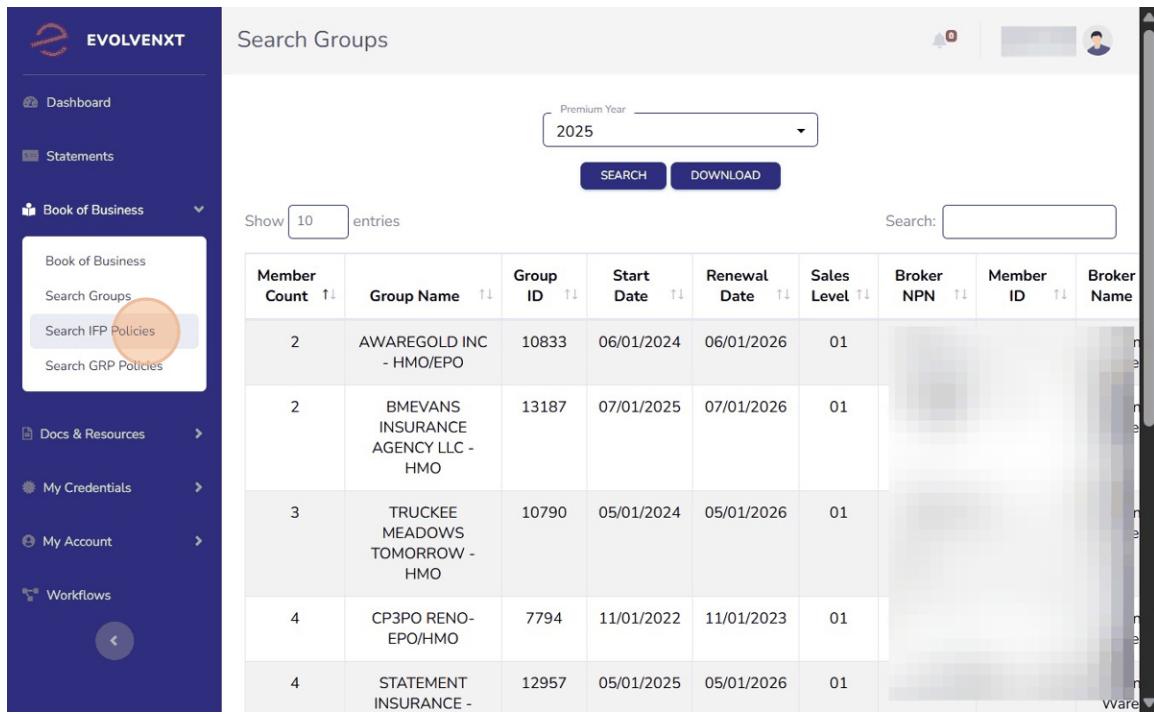


11.

The screenshot shows the 'Search Groups' page with a list of groups. The 'Book of Business' menu item is highlighted with a red circle. The table lists the following groups:

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			

12.



EVOLVENXT

Dashboard

Statements

Book of Business

Book of Business

Search Groups

Search IFP Policies (highlighted)

Search GRP Policies

Docs & Resources

My Credentials

My Account

Workflows

Premium Year: 2025

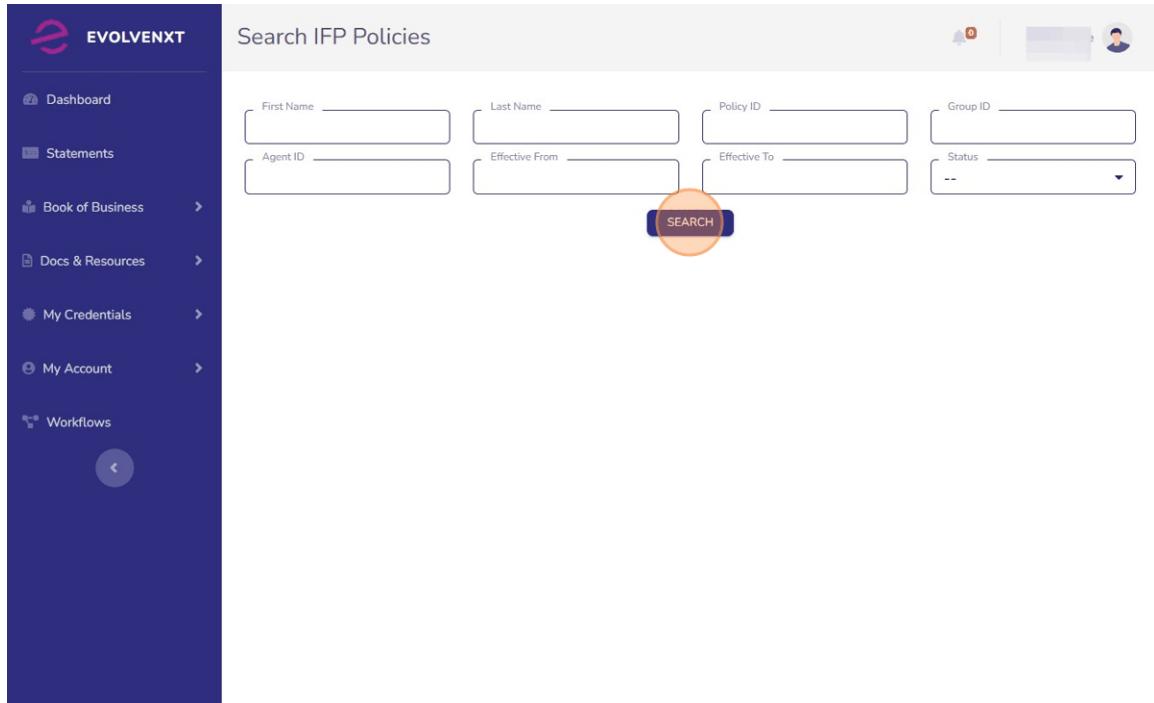
SEARCH DOWNLOAD

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

Dashboard

Statements

Book of Business

Book of Business

Search Groups

Search IFP Policies (highlighted)

Search GRP Policies

Docs & Resources

My Credentials

My Account

Workflows

First Name:

Last Name:

Policy ID:

Group ID:

Agent ID:

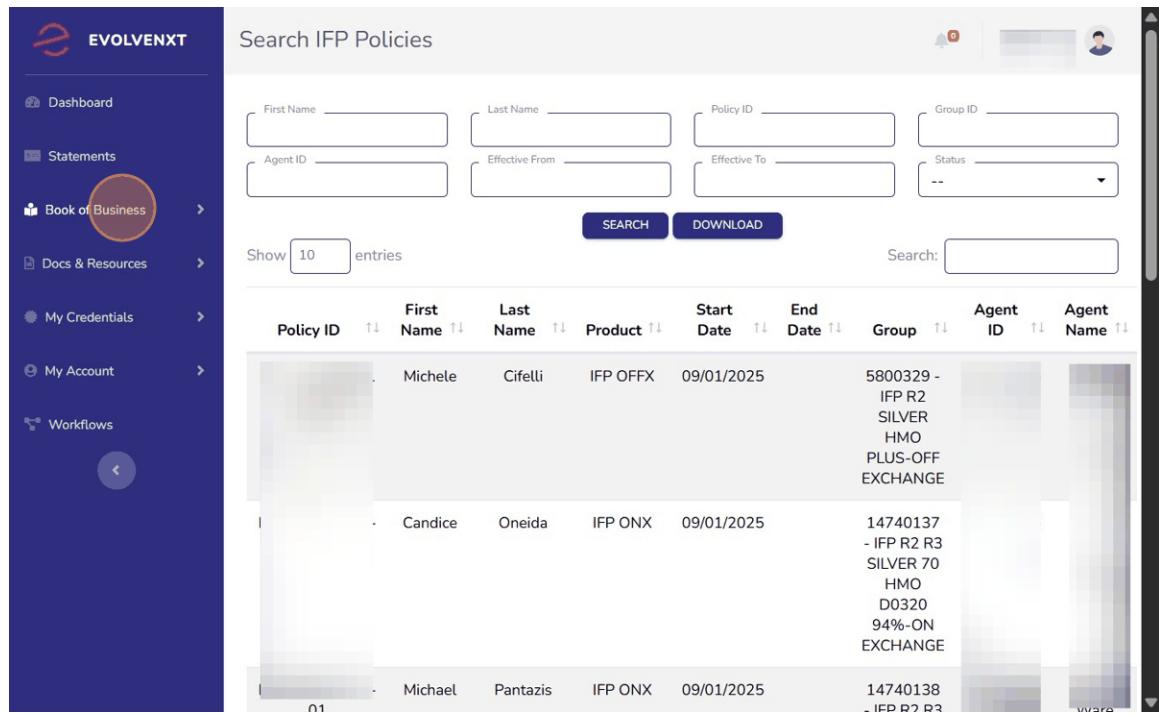
Effective From:

Effective To:

Status:

SEARCH

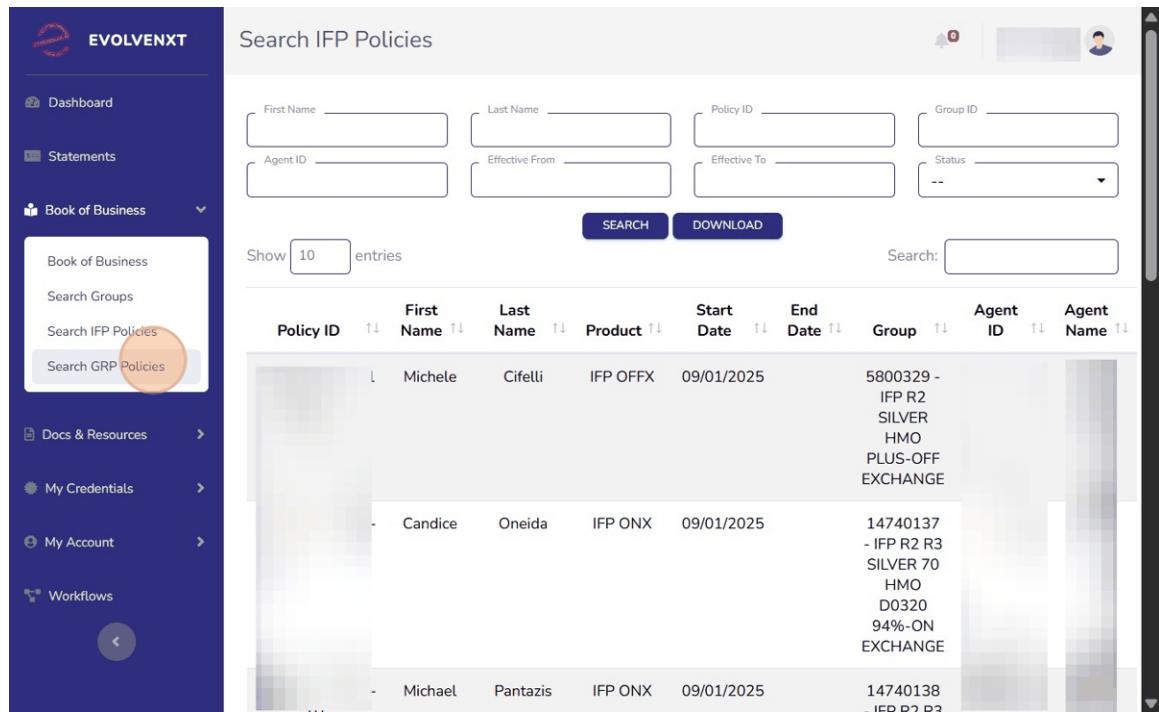
14.



Search IFP Policies

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

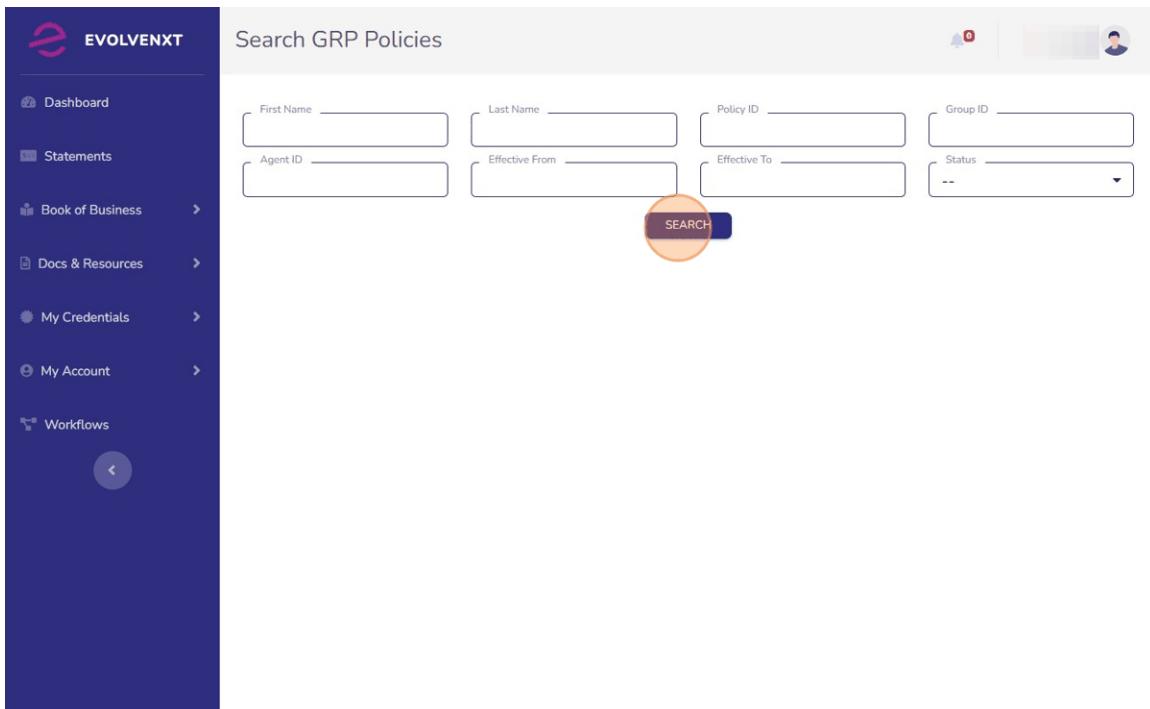
15.



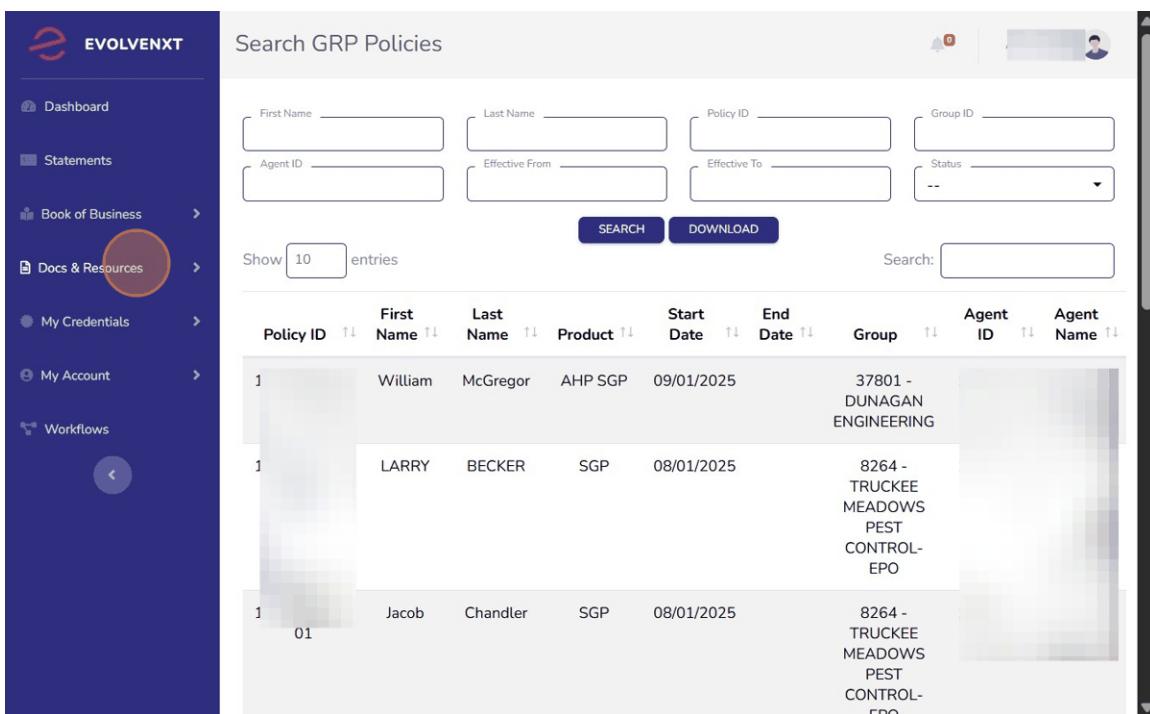
Search IFP Policies

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

16.



17. Select "Docs & Resources"



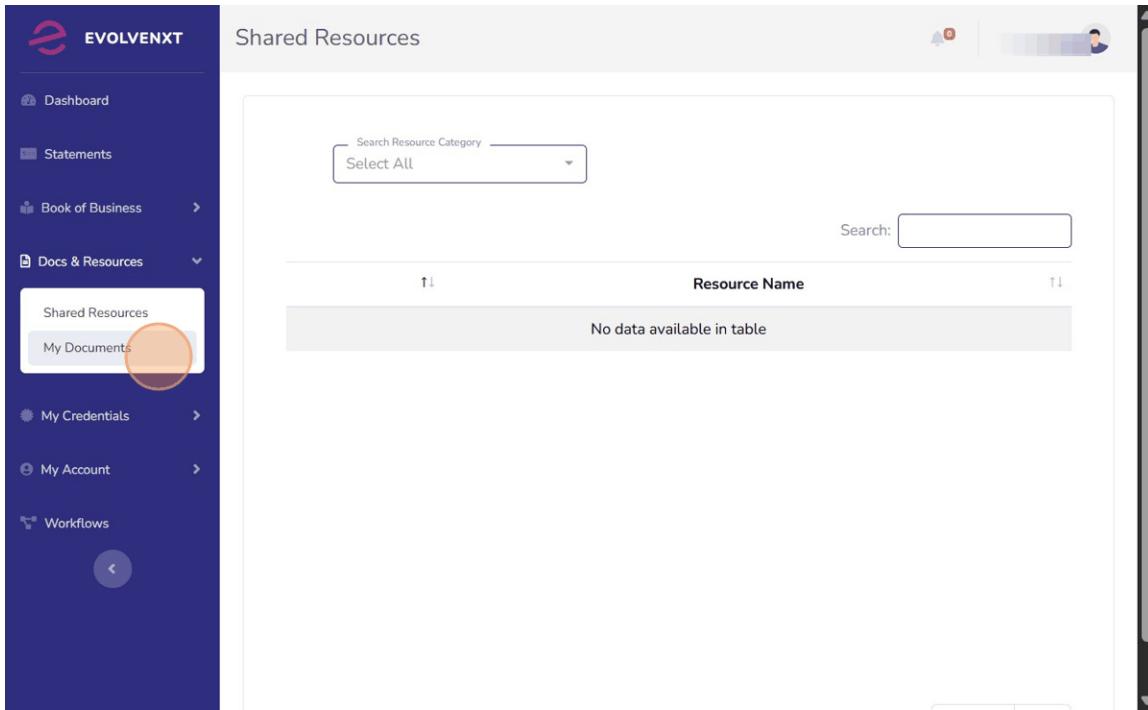
18. Select "Shared Resources"

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 any documentation that has been shared to you by your health plan

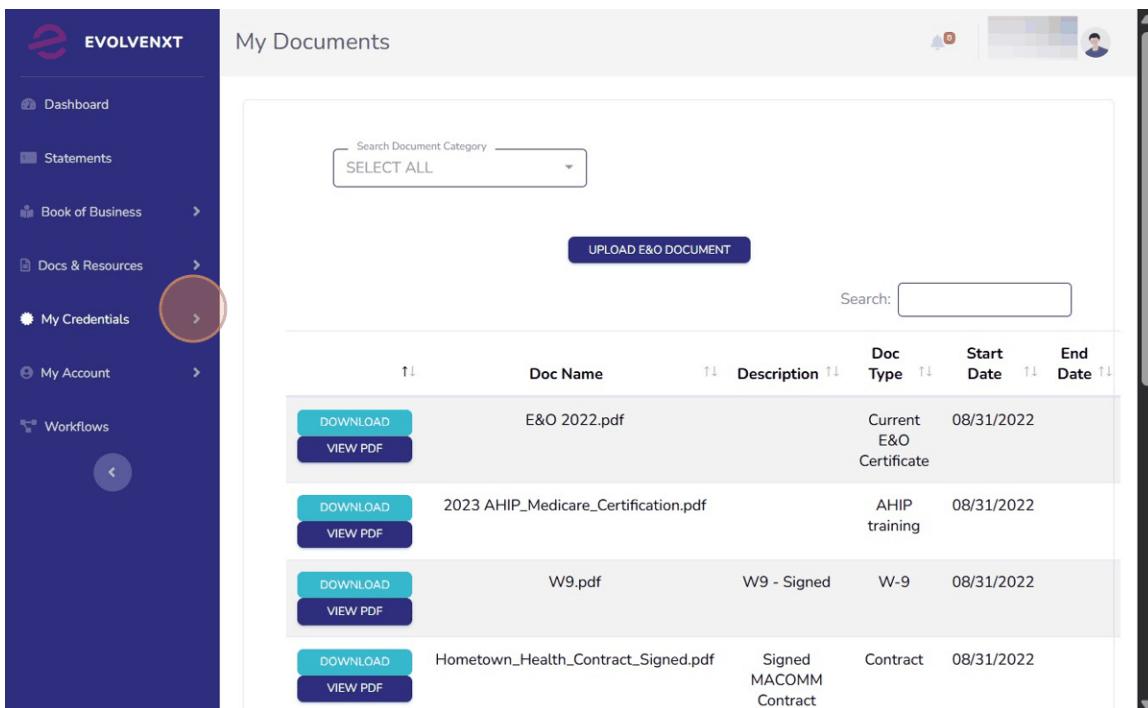
Resource Name
No data available in table

20. Click "My Documents"



The screenshot shows the 'Shared Resources' page. The sidebar on the left has a 'Docs & Resources' section with 'Shared Resources' and 'My Documents' listed. The 'My Documents' link is highlighted with an orange circle. The main content area is titled 'Shared Resources' and shows a table with a single row: 'No data available in table'. There are search and filter options at the top of the table.

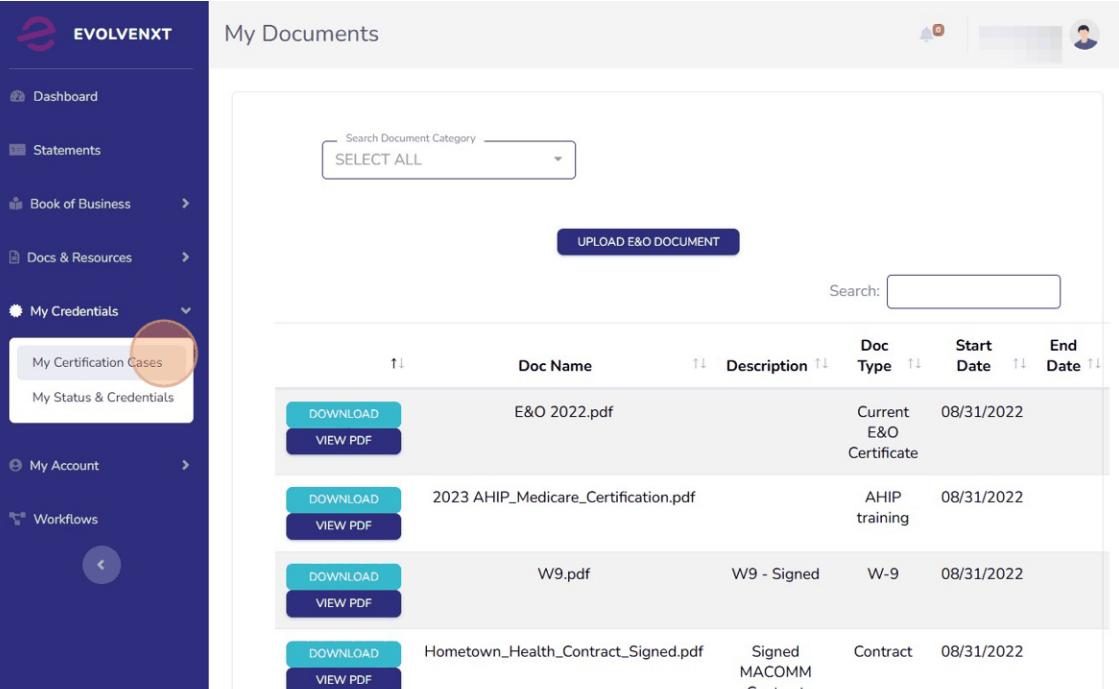
21. This will show you any documents you uploaded during the onboarding process such as your W9 or AHIP Cert.



The screenshot shows the 'My Documents' page. The sidebar on the left has a 'Docs & Resources' section with 'My Credentials' listed. The 'My Credentials' link is highlighted with an orange circle. The main content area is titled 'My Documents' and shows a table of uploaded documents. The table has columns: Doc Name, Description, Doc Type, Start Date, and End Date. Each row includes 'DOWNLOAD' and 'VIEW PDF' buttons. The data in the table is as follows:

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

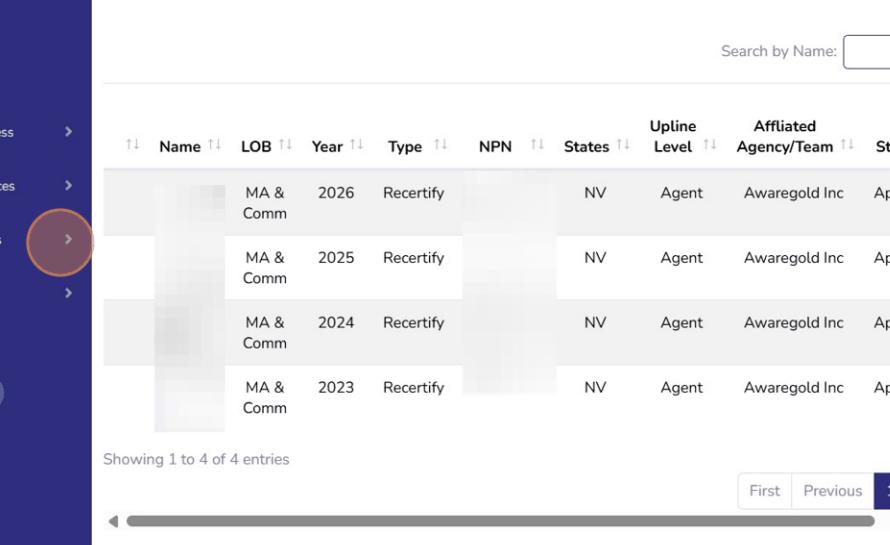
22. Select "My Credentials">> "My Certification Cases"



The screenshot shows the 'My Documents' section of the EVOLVENXT platform. On the left, a sidebar menu includes 'Dashboard', 'Statements', 'Book of Business', 'Docs & Resources', 'My Credentials' (with 'My Certification Cases' and 'My Status & Credentials' sub-options, the latter circled in orange), 'My Account', and 'Workflows'. The main area displays a search bar for 'Document Category' with a dropdown menu showing 'SELECT ALL'. A large blue button labeled 'UPLOAD E&O DOCUMENT' is centered. Below it is a search bar with the placeholder 'Search:'. A table lists four documents with columns: Doc Name, Description, Doc Type, Start Date, and End Date. Each document row includes 'DOWNLOAD' and 'VIEW PDF' buttons.

	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 MACCOMM 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

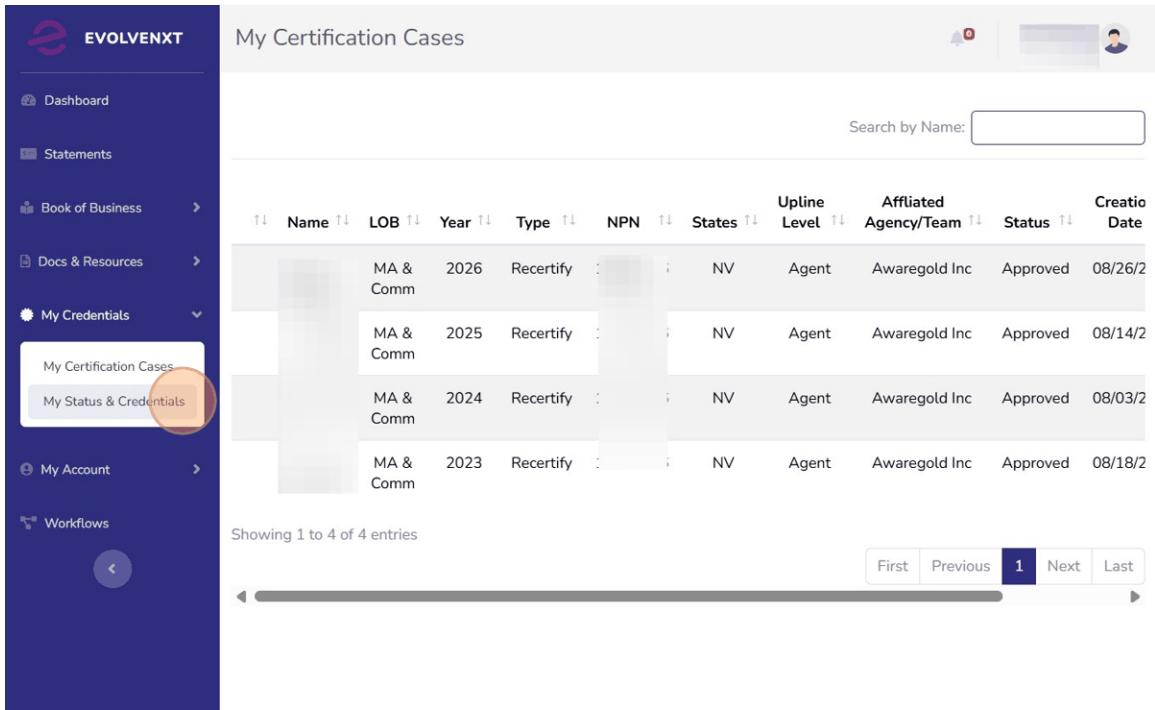
Search by Name:

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

Showing 1 to 4 of 4 entries

First Previous **1** Next Last

24. "My Status & Credentials"



My Certification Cases

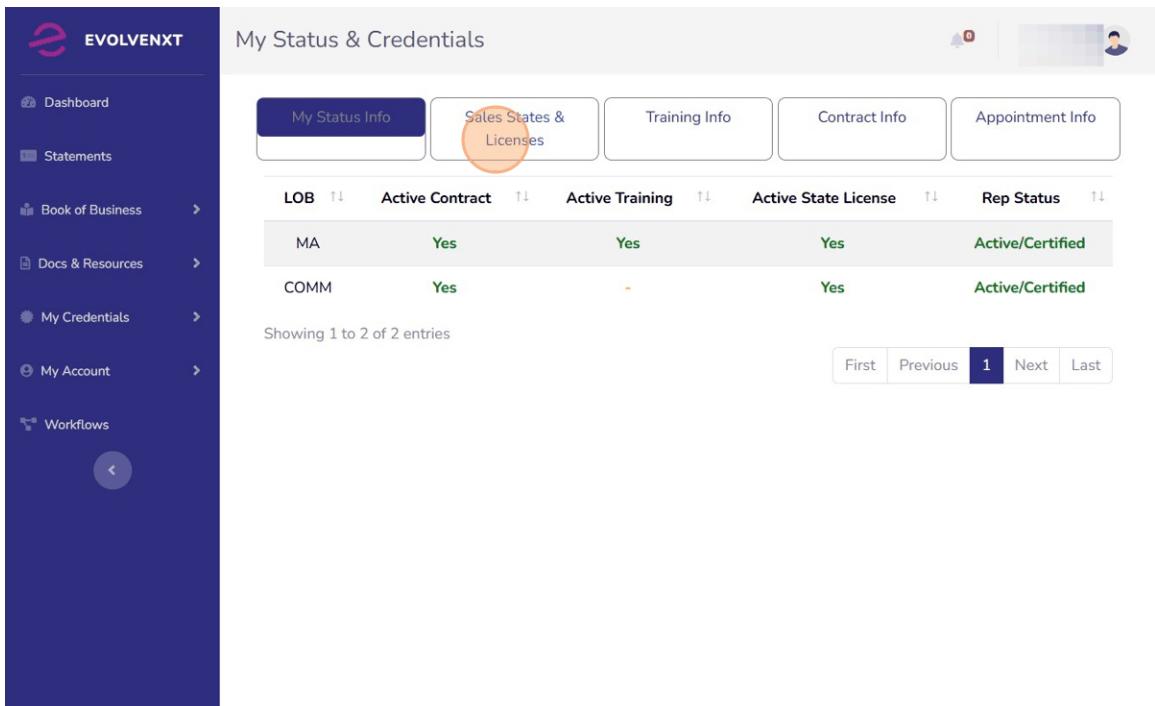
Name	LOB	Year	Type	NPN	States	Upline Level	Affiliated Agency/Team	Status	Created Date
MA & Comm	2026	Recertify			NV	Agent	Awaregold Inc	Approved	08/26/2
MA & Comm	2025	Recertify			NV	Agent	Awaregold Inc	Approved	08/14/2
MA & Comm	2024	Recertify			NV	Agent	Awaregold Inc	Approved	08/03/2
MA & Comm	2023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



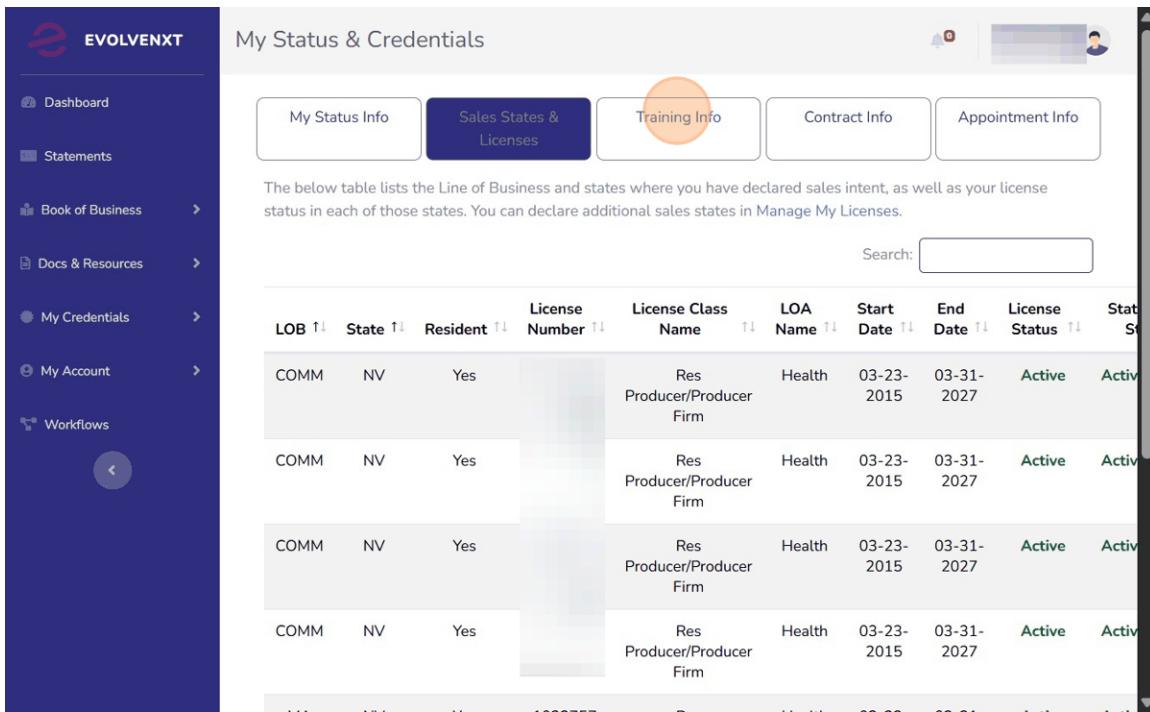
My Status & Credentials

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.



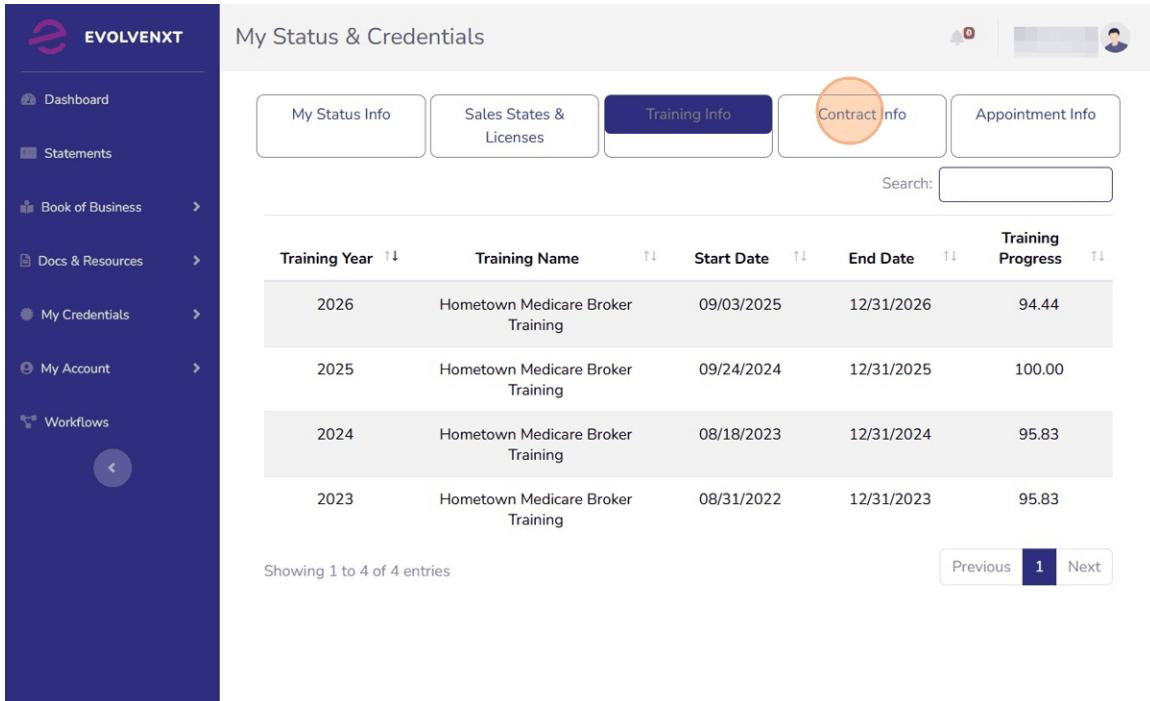
My Status & Credentials

Training 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.

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

27.



My Status & Credentials

Contract Info

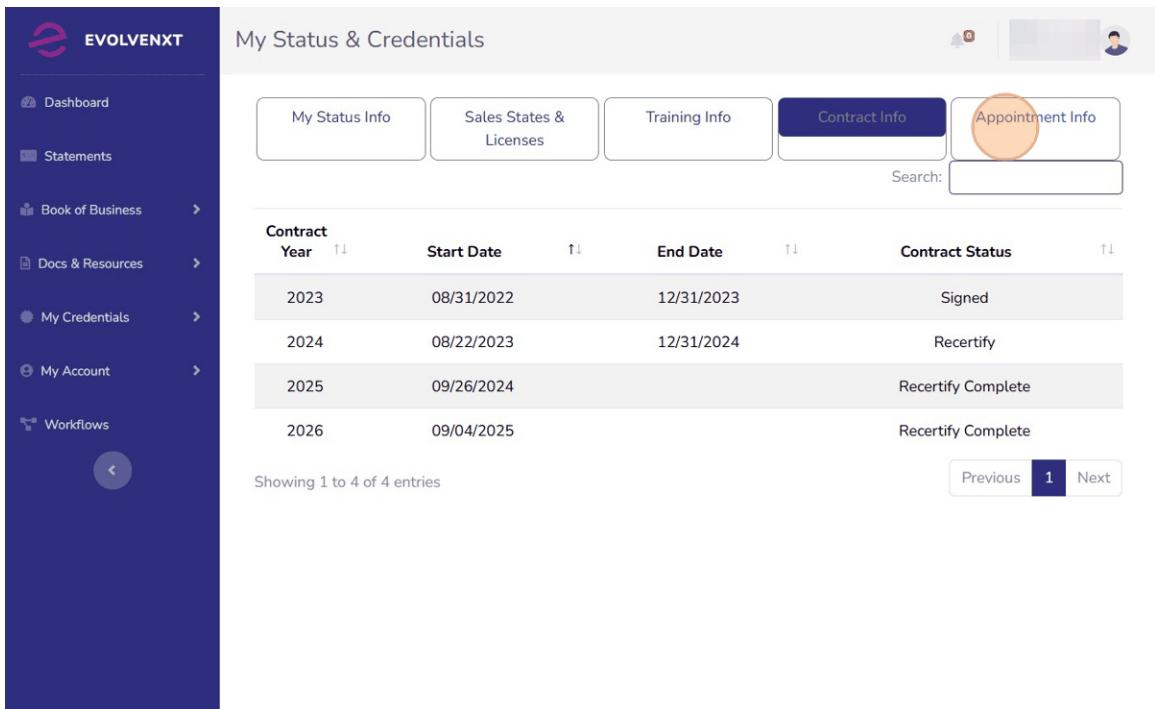
Training Year

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

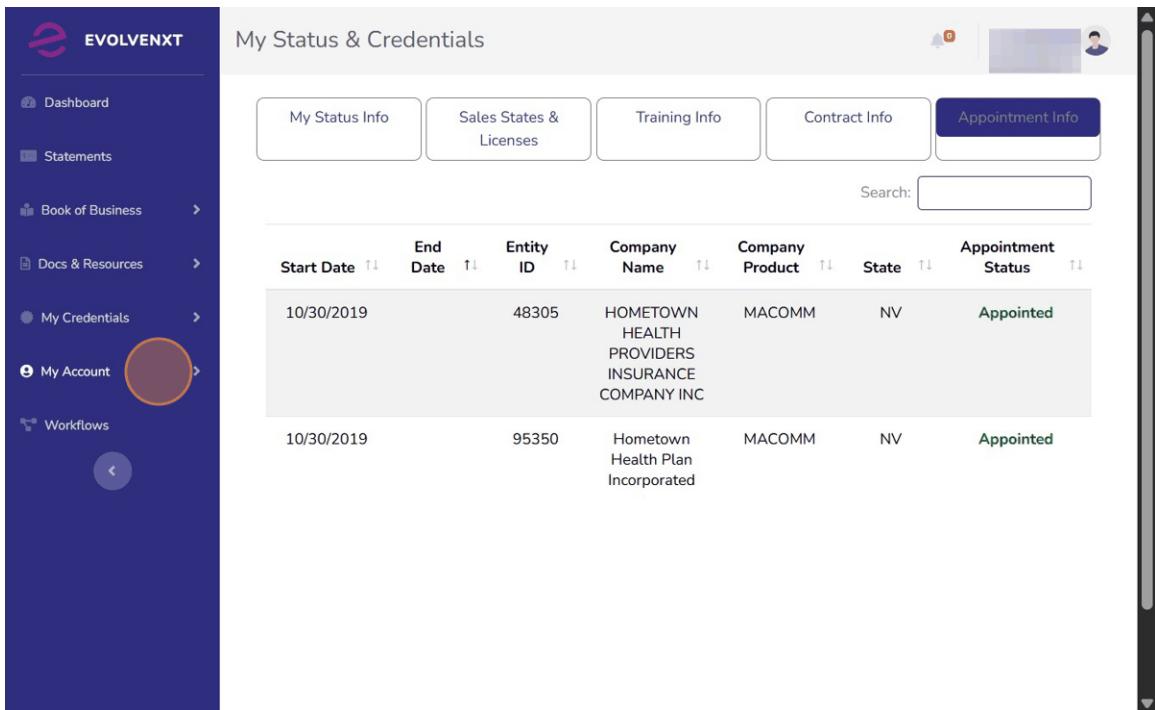
Previous 1 Next

28.



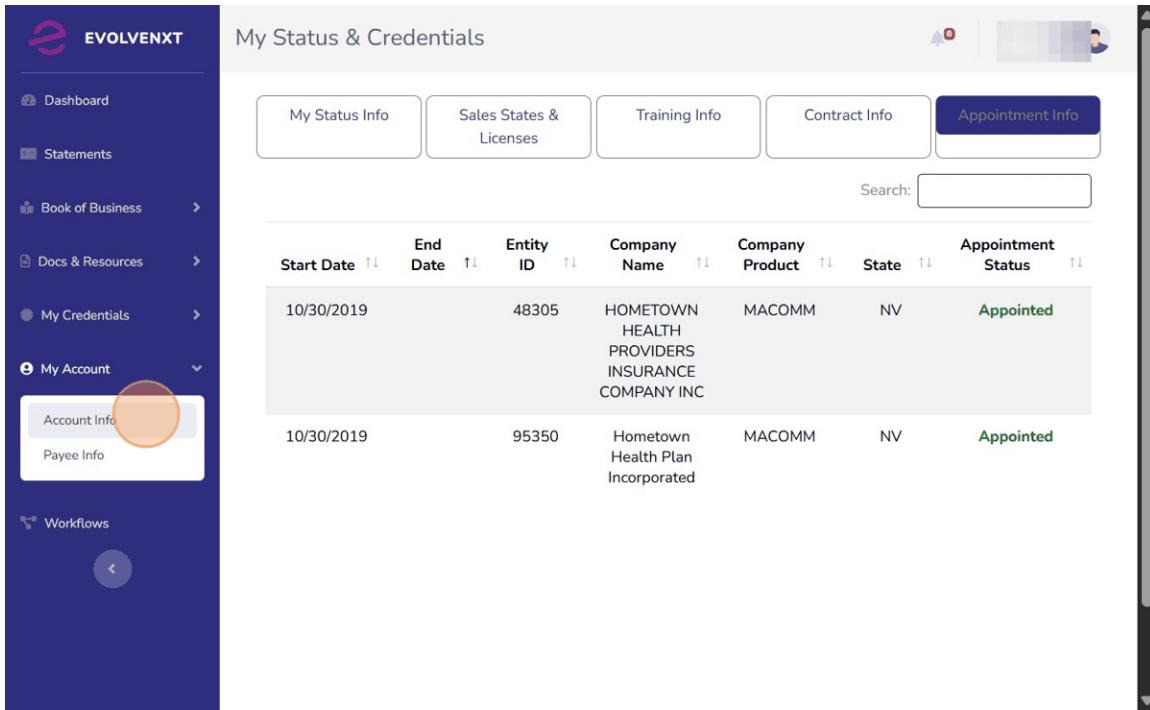
The screenshot shows the 'My Status & Credentials' page. The left sidebar includes 'Dashboard', 'Statements', 'Book of Business', 'Docs & Resources', 'My Credentials', 'My Account', and 'Workflows'. The main content area is titled 'My Status & Credentials' and features a navigation bar with 'My Status Info', 'Sales States & Licenses', 'Training Info', 'Contract Info' (which is highlighted in blue), and 'Appointment Info' (which is highlighted in orange). A search bar is located below the navigation bar. The 'Contract Info' section displays a table with columns: 'Contract Year' (2023, 2024, 2025, 2026), 'Start Date' (08/31/2022, 08/22/2023, 09/26/2024, 09/04/2025), 'End Date' (12/31/2023, 12/31/2024, Recertify Complete, Recertify Complete), and 'Contract Status' (Signed, Recertify, Recertify Complete, Recertify Complete). Below the table, it says 'Showing 1 to 4 of 4 entries' and has 'Previous', '1', and 'Next' buttons.

29.



The screenshot shows the 'My Status & Credentials' page. The left sidebar includes 'Dashboard', 'Statements', 'Book of Business', 'Docs & Resources', 'My Credentials', 'My Account' (which is highlighted in orange), and 'Workflows'. The main content area is titled 'My Status & Credentials' and features a navigation bar with 'My Status Info', 'Sales States & Licenses', 'Training Info', 'Contract Info', and 'Appointment Info' (which is highlighted in purple). A search bar is located below the navigation bar. The 'Appointment Info' section displays a table with columns: 'Start Date' (10/30/2019, 10/30/2019), 'End Date' (10/30/2019, 10/30/2019), 'Entity ID' (48305, 95350), 'Company Name' (HOMETOWN HEALTH PROVIDERS INSURANCE COMPANY INC, Hometown Health Plan Incorporated), 'Company Product' (MACCOMM, MACCOMM), 'State' (NV, NV), and 'Appointment Status' (Appointed, Appointed). A vertical scroll bar is visible on the right side of the page.

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



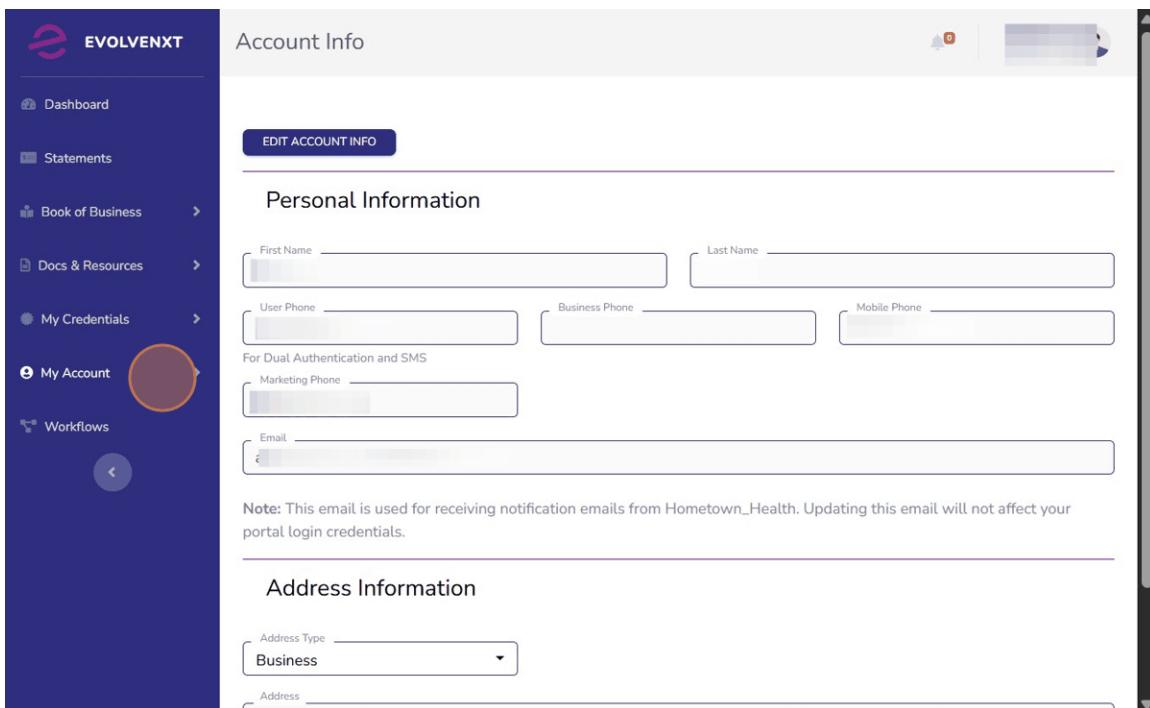
My Status & Credentials

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	MACCOMM	NV	Appointed
10/30/2019		95350	Hometown Health Plan Incorporated	MACCOMM	NV	Appointed

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



Account Info

EDIT ACCOUNT INFO

Personal Information

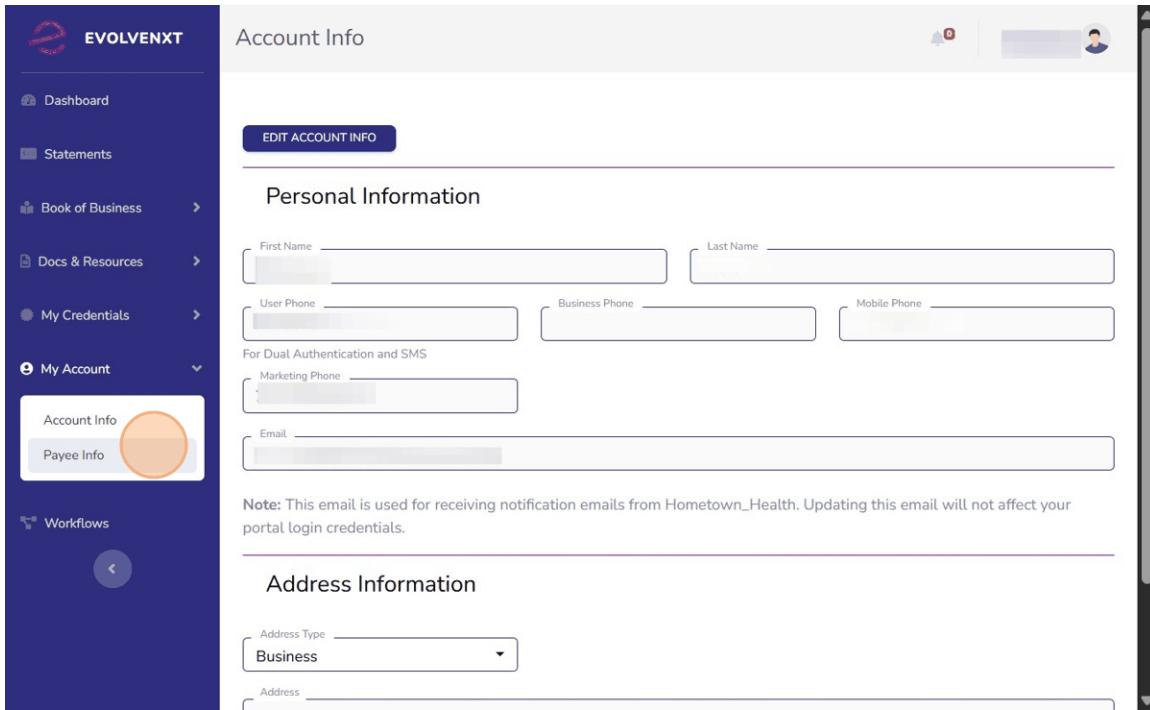
First Name Last Name
User Phone Business Phone Mobile Phone
For Dual Authentication and SMS
Marketing Phone
Email

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

Address Information

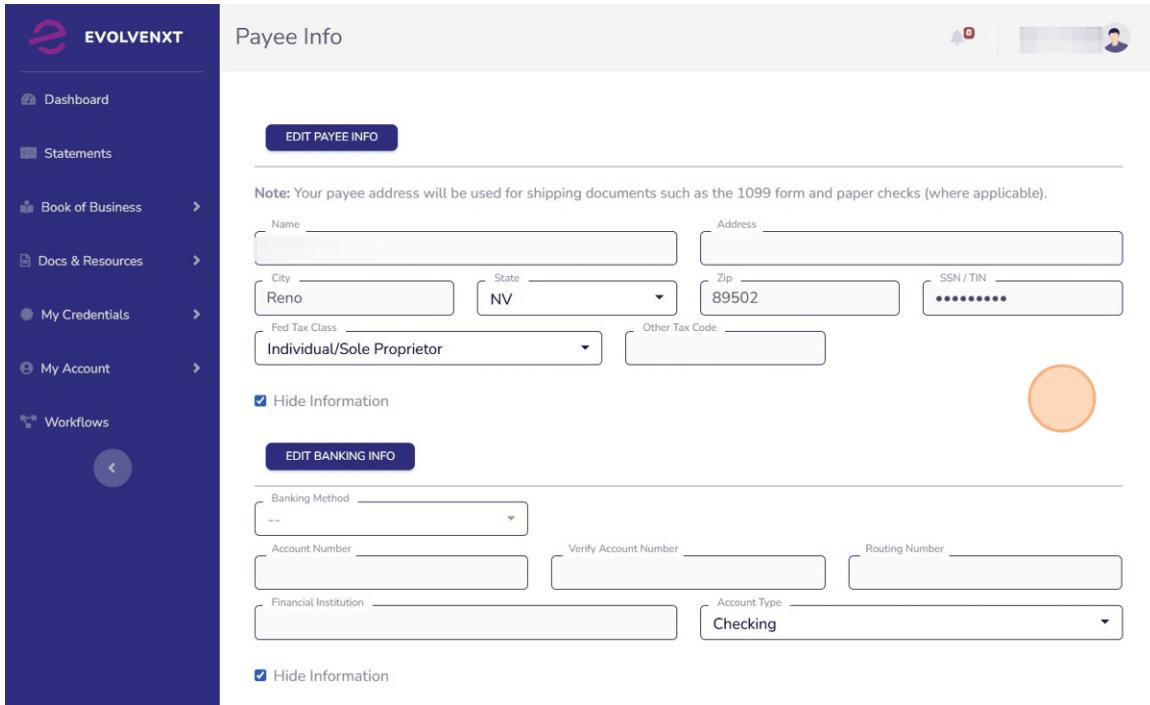
Address Type
Address

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



The screenshot shows the 'EVOLVENXT' portal interface. The left sidebar has a dark blue background with white text and icons. The 'My Account' section is expanded, showing 'Account Info' and 'Payee Info'. The 'Payee Info' option is highlighted with an orange circle. The main content area is titled 'Account Info' and contains a 'Personal Information' section with fields for First Name, Last Name, User Phone, Business Phone, Mobile Phone, Marketing Phone, and Email. A note below the email field states: 'Note: This email is used for receiving notification emails from Hometown_Health. Updating this email will not affect your portal login credentials.' Below that is an 'Address Information' section with a dropdown for Address Type set to 'Business' and a text field for Address.

33.



The screenshot shows the 'EVOLVENXT' portal interface. The left sidebar has a dark blue background with white text and icons. The 'My Account' section is expanded, showing 'Payee Info'. The 'Payee Info' section is titled 'Payee Info' and contains a 'EDIT PAYEE INFO' button. A note below the button states: 'Note: Your payee address will be used for shipping documents such as the 1099 form and paper checks (where applicable).'. The form includes fields for Name, Address, City (Reno), State (NV), Zip (89502), SSN / TIN (*****), Fed Tax Class (Individual/Sole Proprietor), and Other Tax Code. Below this is an 'EDIT BANKING INFO' button. The banking info section includes fields for Banking Method (dropdown with '=='), Account Number, Verify Account Number, Routing Number, Financial Institution, Account Type (dropdown with 'Checking'), and a 'Hide Information' checkbox. A large orange circle highlights the 'Edit Banking Info' button.