



# **2024 AGENT ONBOARDING AND CERTIFICATION MANUAL**

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# INTRODUCTION



Each year, the Centers for Medicare & Medicaid Services (CMS) provides Medicare Advantage Organizations (MAOs)/Part D sponsors training and testing requirements for their agents and brokers. These requirements include Medicare Basics, FWA and Plan Specific Product training. Agents are also required to maintain active license status and stay up to speed on ATRIO Health Plan policies.

ATRIO Health Plans utilizes EvolveNXT to deliver our annual onboarding and certification. We have designed a streamlined and simple process to get you certified and ready to sell ATRIO Health Plans.

The program includes ensuring current agent information is on file, how you would like to be paid, license and appointment verification, background check, Medicare Certification and Errors & Omissions upload, and ATRIO Health Plans product training and exam.

We have created this manual to help guide you through the process step-by-step.

# CERTIFICATION EMAIL AND LINK



Existing users will see their dashboard upon logging into your EvolveNXT portal. Your home screen/dashboard consists of several useful widgets including: Quick Links, Credentials, Book of Business Birthdays, and Enrollment activities. The navigation bar on the left guides you to the different sections of your portal.

**Dashboard**

NAVIGATION

- DASHBOARD
- BOOK OF BUSINESS
- APPLICATION STATUS
- ENROLLMENT & FORMS >
- LMS
- DOCUMENTS & RESOURCES >
- MY STATUS & CREDENTIALS
- MY ACCOUNT >

**Quick Links**

Link	Description
<a href="#">Agent Training Calendar</a>	Agent Training Calendar
<a href="#">2022 Benefit First Look</a>	2022 Benefit First Look
<a href="#">ATRIO Health Plans Website</a>	ATRIO Health Plans Website

[More Links](#)

**My Credentials**

Broker Status: **Suspended - Pending State License/Training**

State Licenses: **0 Active | 0 Expired**

[View Details](#)

**Birthdays** **582**

[View Details](#)

**New Enrollments**

Newly enrolled members within the past 12 months

Month	Newly Enrolled Members
September	30
October	20
November	25
December	20
January	450
February	60
March	40
April	55
May	45
June	45
July	45
August	25

**Medicare Book of Business**

Total Book of Business over time within the past 12 months

Month	Total Book of Business
Sep	5400
Oct	5420
Nov	5450
Dec	5480
Jan	5920
Feb	5980
Mar	6020
Apr	6080
May	6120
Jun	6180
Jul	6220
Aug	6250

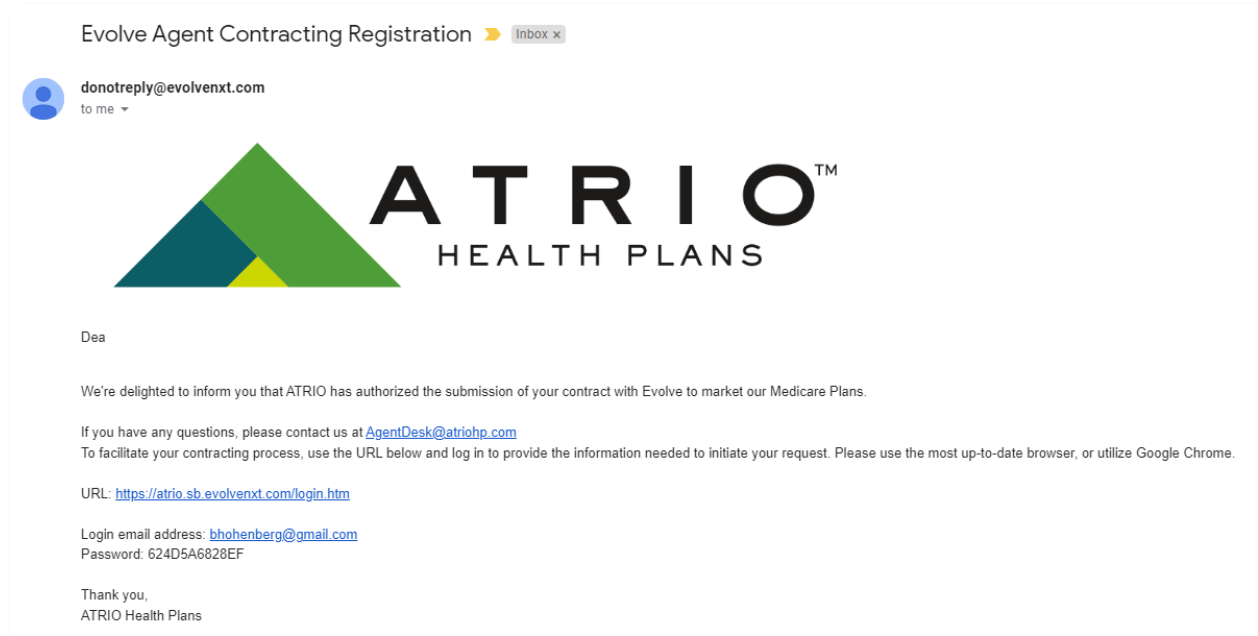
# CERTIFICATION EMAIL AND LINK



The process begins with the delivery of an Onboarding and Certification email from ATRIO Health Plans.

The email will be coming from [donotreply@evolvenxt.com](mailto:donotreply@evolvenxt.com)

Click on the URL to begin the certification process.



# MY CERTIFICATION CASES



Existing users will access their new 2024 ATRIO certification case by clicking “My Credentials” in the left hand navigation bar. Then select “My Certification Cases”. The red “1” lets you know you have a new notification in that section.

My Certification Cases

Search by Name: \_\_\_\_\_

Name	LOB	Year	Type	NPN	Sales Level	Affiliated Agency/Team	Submitted By	Creation Date	Status
218 INSURANCE PARTNERS	Medicare Advantage	2023	Recertify	20179410	Broker		Jessica W.	08/09/2022	Unsubmitted - Contract Info

Showing 1 to 1 of 1 entries

FIRST PREVIOUS 1 NEXT LAST

Agents that are new to ATRIO and Evolve in 2024 will need to complete the initial certification. Your screen will only show the “My Certification Cases” option.

My Certification Cases

Search by Name: \_\_\_\_\_

Name	LOB	Year	Type	NPN	Sales Level	Affiliated Agency/Team	Submitted By	Creation Date	Status
Brandon Helbig	Medicare Advantage	2023	Initial	18699774	Broker		Brandon H.	08/05/2022	Created - New

Showing 1 to 1 of 1 entries

FIRST PREVIOUS 1 NEXT LAST

Click Start/Continue to access your certification.

# MY CERTIFICATION CASES



You will be prompted to verify your NPN and SSN which validates against the info we pull from NIPR.

Once you enter your info, click “Validate”.

A screenshot of the ATRIO Health Plans user interface. The page title is "My Certification Cases". A navigation sidebar on the left contains the ATRIO logo and "MY CERTIFICATION CASES". A modal window titled "Before You Begin..." is displayed in the center. The modal contains a form with the following fields: NPN (18699774), First Name (Brandon), Last Name (Helbig), and SSN (empty). Below the SSN field is a red error message: "This field is required." and a note: "Do not include hyphens nor spaces." A green "VALIDATE" button is at the bottom of the modal. The background shows a blurred view of the main page with several buttons.

# CONTACT INFO



Next you will enter your contact info. Existing users will have your info already populated.

Broker Type and Upline information are carried over from your previous year information or set when creating your initial onboarding link.

Please read to ensure your information is listed correctly. This is how you will elect to be paid.

If your info is incorrect, click “Abort” and reach out to [agentdesk@atriohp.com](mailto:agentdesk@atriohp.com) for assistance.

If your info is correct, check the box and click “Continue”

My Certification Cases

CONTACT INFO PAYMENT LICENSE INFO DOCUMENTS TRAINING SUBMIT

Address 1 \*  
Address 2  
City \*  
State \* --  
Zip Code \*

Broker Information

Broker Type Field Broker

Upline Information

LOB Medicare Advantage  
Sub Type Direct  
Sales Level 01 - Broker  
Next Upline

You are onboarding as a 1099, Direct to ATRIO Health Plan. This means that you do not have an upline and you will receive your own commissions. Your commissions cannot be assigned to another contracted entity and you will have to complete banking information for payment. After you are Active/Certified, you will have the ability to request to join a hierarchy and assign commissions to this entity. If this is not the model you wish to onboard as, please click the Abort option below and request a new invitation from your preferred hierarchy or agency.

ABORT CONTINUE



# PAYMENT



Those agents being paid commissions directly by ATRIO will be prompted to enter (or verify for existing users) payment information.

If you want to declare a private company to be your payee or DBA, you can select this option here and add the information needed to populate your W9.

A screenshot of the ATRIO web application interface. The page title is "My Certification Cases". The navigation menu includes "CONTACT INFO", "PAYMENT" (which is highlighted), "LICENSE INFO", "DOCUMENTS", "TRAINING", and "SUBMIT". The user's name "BRANDON HELBIG" is visible in the top right corner. The main content area is titled "Payee" and contains the following text: "You are eligible to declare a private company, that you legally represent or own, to be your payee. This means that any money earned is paid to the Tax ID of this company. It also means that the 1099 tax form issued to you will be in the name and Tax ID of this company. If you chose to declare a payee, you will be prompted to sign a W9 form for your declared company payee. If you chose to not declare a company as your payee, then you will be the payee on record. This means that the 1099 tax form issued to you will be in your name and SSN. You will be prompted to sign a W9 form with your information." Below this text is a question: "Do you want to declare a private company to be your payee?" with a dropdown menu currently set to "No". The "Banking Information" section contains the following fields: "Payment Method" (ACH (Direct Deposit)), "Account Type" (Checking), "[7] Account Number" (masked with asterisks), "Verify Account Number" (masked with asterisks), "[7] Routing Number" (234523455), and "Financial Institution" (Big Bank). At the bottom of the form are "ABORT" and "CONTINUE" buttons.

# LICENSE INFO



Next, you will select the states in which you wish to sell ATRIO plans in 2024.

All states in which ATRIO is offered and you have an active license will show as a selectable option.

A screenshot of the ATRIO web application interface. The page title is "My Certification Cases". On the left is a dark teal navigation sidebar with the ATRIO logo and "MY CERTIFICATION CASES" selected. At the top right, there is a user profile for "BRANDON HELBIG" with a notification bell icon. Below the navigation is a horizontal menu with tabs: "CONTACT INFO", "PAYMENT", "LICENSE INFO" (which is highlighted in dark teal), "DOCUMENTS", "TRAINING", and "SUBMIT". The main content area is titled "License Information" and contains the following text: "The licenses shown below reflect active licenses you hold in states where Wellcare offers Medicare Advantage and/or Prescription Drug plans. Please elect licenses where you plan to market / sell Wellcare products. Please note, you will be able to update your elections within your portal at any time. Your Resident State License is automatically selected." Below this text is a form field containing a checked checkbox and the text "OR - Oregon". At the bottom of the form are two buttons: a red "ABORT" button and a dark teal "CONTINUE" button.

# DOCUMENTS



Next, all agents will be required to upload their current E&O insurance. Just the declaration page is required.

You are also required to upload your Annual Medicare Certification. Here you will upload the certificate from AHIP/NAHU/Gorman Health Group.

Click the blue boxes to open the document upload popup.

.pdf, .jpeg, .img file types will work

My Certification Cases

NAVIGATION

- MY CERTIFICATION CASES

CONTACT INFO PAYMENT LICENSE INFO **DOCUMENTS** TRAINING SUBMIT

Please ensure you upload at least 1 file per each required type.

Required documents:

- Current E&O Certificate
- Annual Medicare Certification Accepted AHIP/NAHU/Gorman

All other documents shown, if any, are optional uploads.  
TO UPLOAD A SPECIFIC FILE TYPE, CLICK ON THE CORRESPONDING BOX.

Uploaded Documents

No documents loaded.

Add Document(s)

UPLOAD Current E&O Certificate

UPLOAD Annual Medicare Certification Accepted AHIP/NAHU/Gorman

ABORT CONTINUE

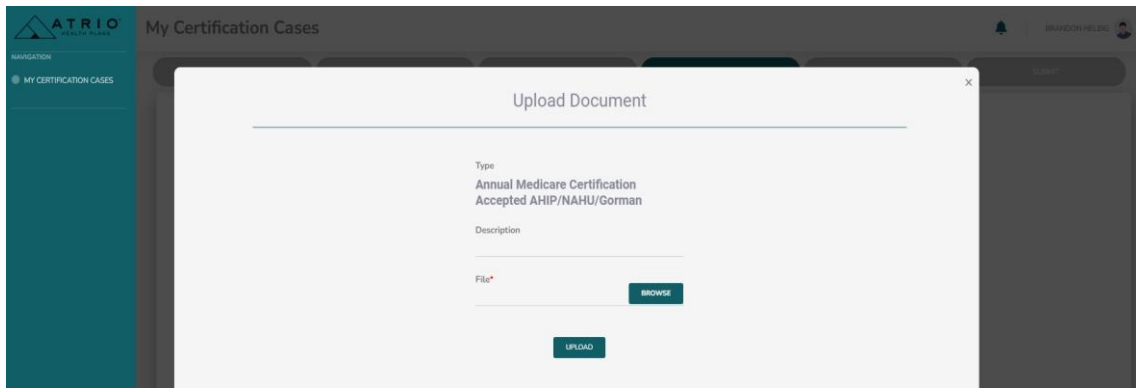
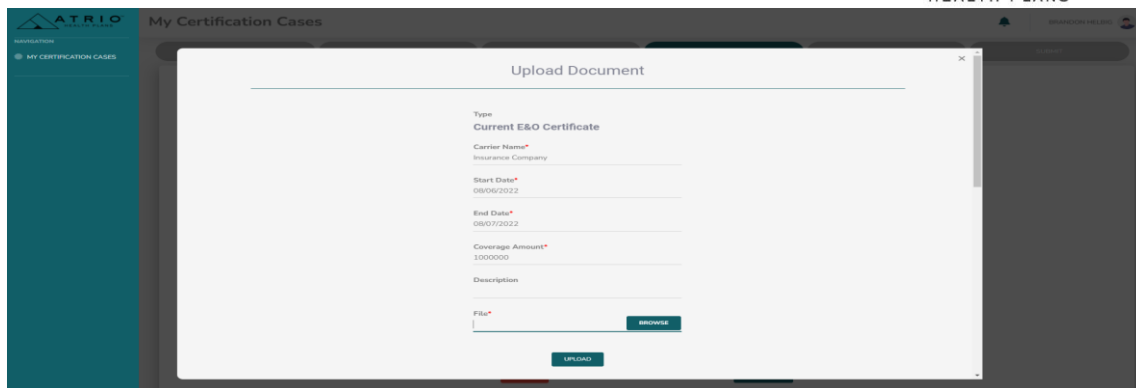
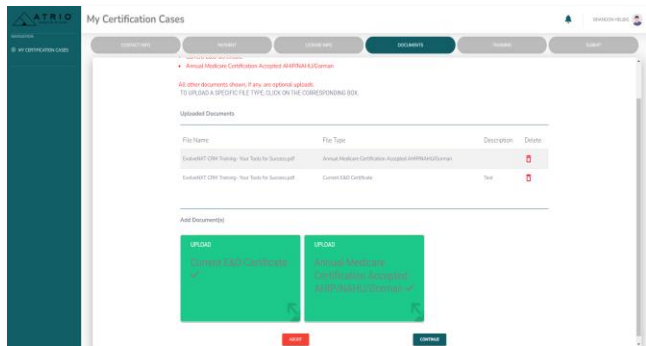
# DOCUMENTS

When uploading the E&O, you will need to key in your Coverage, Start and End Date, and Coverage amount.

Click Browse, select the file, and upload.

Follow the same process for uploading your Medicare Certificate.

When both have been uploaded, you will see the green boxes below.



# TRAINING



After uploading your documents, you will move on to the 2023/2024 ATRIO Health Plans product training course.

Click “Take Training” to begin. You will have the option to download the material as well as scrolling through the presentation.

The exam is 20 questions. You have 3 attempts to pass the exam with an 85% or better.

Once your status shows as “Passed” you will be able to continue.

My Certification Cases

CONTACT INFO PAYMENT LICENSE INFO DOCUMENTS **TRAINING** SUBMIT

Training Information

Available Trainings

Training Name	Training Type	Status
Atrio Training	Product	Incomplete

Component Name	Started	Completed	Score	Pass / Fail
Atrio Certification				

TAKE TRAINING

ABORT

My Certification Cases

CONTACT INFO PAYMENT LICENSE INFO DOCUMENTS **TRAINING** SUBMIT

Training Information

Available Trainings

Training Name	Training Type	Status
Atrio Training	Product	Passed

Component Name	Started	Completed	Score	Pass / Fail
Atrio Certification	08/05/2022 04:23 PM PDT	08/05/2022 04:31 PM PDT	45.00	Failed

Component Name	Started	Completed	Score	Pass / Fail
Atrio Certification	08/05/2022 04:31 PM PDT	08/05/2022 04:39 PM PDT	100.00	Passed

RESULTS

RESULTS

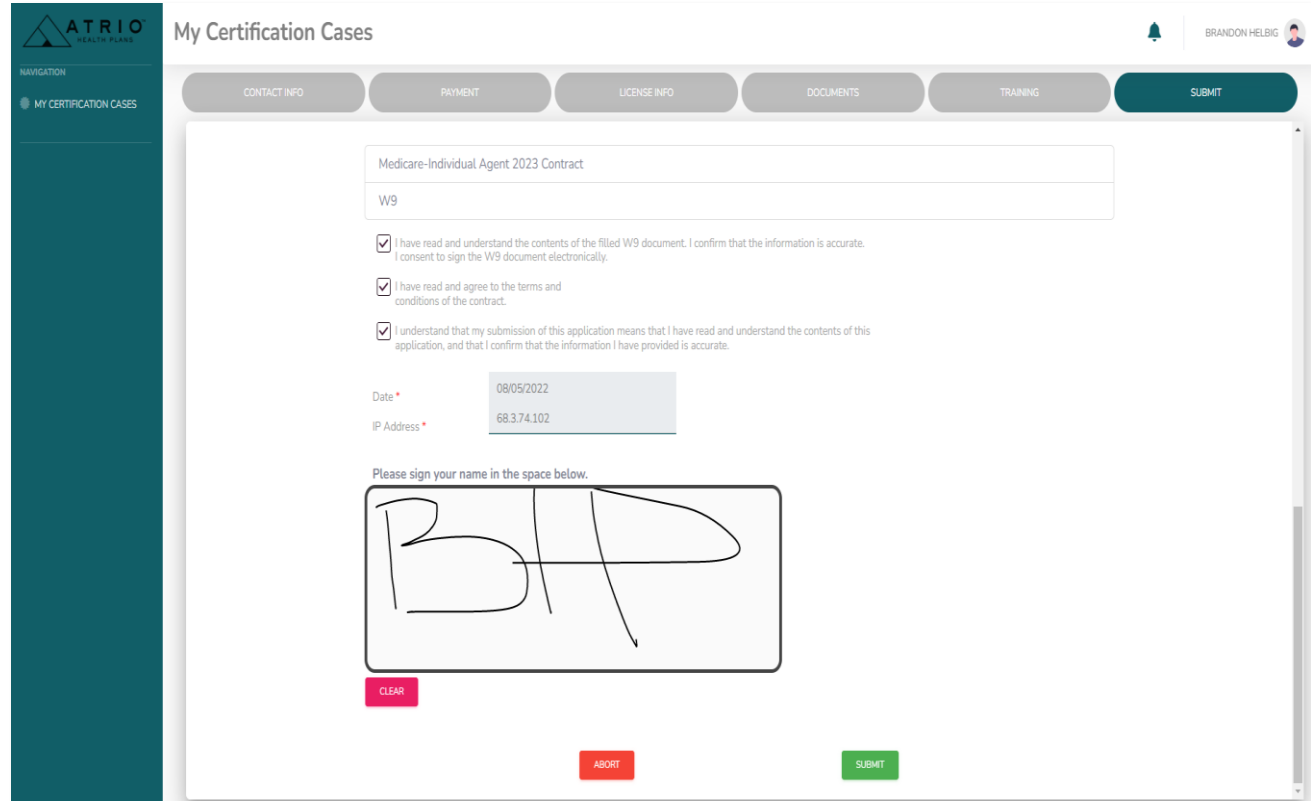
ABORT CONTINUE

# SUBMIT

The final step will present you with our ATRIO Health Plans Agent Contract and your W9 which has been populated with the information you entered on the Payment step.

You can open and read both documents by clicking on them.

You will then check the boxes and sign on the screen as shown.



ATRIO HEALTH PLANS

NAVIGATION

MY CERTIFICATION CASES

### My Certification Cases

CONTACT INFO PAYMENT LICENSE INFO DOCUMENTS TRAINING **SUBMIT**

Medicare-Individual Agent 2023 Contract

W9

- I have read and understand the contents of the filled W9 document. I confirm that the information is accurate. I consent to sign the W9 document electronically.
- I have read and agree to the terms and conditions of the contract.
- I understand that my submission of this application means that I have read and understand the contents of this application, and that I confirm that the information I have provided is accurate.

Date • 08/05/2022

IP Address • 68.3.74.102

Please sign your name in the space below.

CLEAR

ABORT

SUBMIT

# NEXT STEPS



Once submitted, you will see a “Submission Successful” screen where you have the opportunity to download copies of both your contract and W9.

Your case has been submitted to ATRIO staff for review and background check processing. Please allow 1-2 business days for review.

Once, accepted you will receive a confirmation email letting you know you are ready to sell ATRIO Health Plans for both 2023 and 2024 plan years.

A screenshot of the ATRIO Health Plans web application. The page title is "My Certification Cases". The user is identified as "BRANDON HELBIG". The navigation menu includes "CONTACT INFO", "PAYMENT", "LICENSE INFO", "DOCUMENTS", "TRAINING", and "SUBMIT". The main content area displays a "Submission Successful!" message with the following text: "Thank you for submitting your certification workflow. Below is a copy of your signed document(s). Please download and/or print a copy for your records. Once all certification requirements are met, you will become Active/Certified and will be ready to sell." There are two download links: "Download W-9" and "Download Contract". A table below provides user information:

Broker Name	Aaron Burns
Email	bhohenberg@gmail.com
NPN	9156077

# HAVE QUESTIONS?

Contact ATRIO Agent Support at 541-492-2166  
or [AgentDesk@atriohp.com](mailto:AgentDesk@atriohp.com)