

2026 - 2027

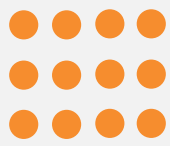
Broker Onboarding, Recertification, & Portal Guide



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Onboarding

[New Broker Invitation](#)

[New Broker Process](#)

[AHIP Prompt](#)

[Assigned Product Training](#)

[Product Exam](#)

[Onboarding Status](#)

Onboarding: New Broker Invitation

Once an onboarding invitation has been generated, you will receive an email from donotreply@evolvenxt.com. You will need the link in your email to navigate to the site using your credentials in the email.

Note: New onboarding invitations expire after 90 days. If the process is not completed within the timeframe, a new case will be required.

From: donotreply@evolvenxt.com
Subject: Zing Health Onboarding Invitation

You are invited to contract with Zing Health to market our Medicare Advantage plans.
To begin, please complete your onboarding workflow using the credentials and link below:

URL: <https://zing.evolvenxt.com/login.htm>

Login email address: {email}
Password: {temporary password}

Please note: This invitation will expire within 90 days. If the process is not completed within that timeframe, your link will deactivate, and you will be required to start over.

IMPORTANT: Before you can be marked as Ready to Sell (RTS), you must transmit your AHIP certification to Zing Health using the following link:
<http://ahipmedicaretraining.com/clients/zinghealth>

If you have trouble accessing the registration portal, please use the Lost Password function.
For further assistance, contact us at Brokers@myzinghealth.com or call 844-946-4226 (Monday–Friday, 8 AM – 5 PM CT).

If you are unsure why you are receiving this email, please reach out to your recruiting agency.
We look forward to partnering with you!
Thank you,
Zing Health



Onboarding: New Broker Process

Once logged in, you will see your onboarding case. Before proceeding, verify your Broker Type and Broker Sub Type are accurate. If you have questions, on either, please reach out to your upline for assistance. If you are an Agency Principal, you will complete this step for your agency first, and then for you as an individual broker.

If all information is accurate, select "START" to begin.

EVOLVENXT My Certification Cases

Search by Names:

	LoB	Type	Status	Email	NPN	Broker Type	Broker Sub Type	Sales Level	Name	Upline Name	Creation Date	Email Send Date	Year	Submitted By
START	Medicare Advantage	Initial	Created - New			Field Broker	Downline Only	Agent - 01			06/23/2026	06/23/2026	2027	

Showing 1 to 1 of 1 entries

Rep Type Description

Your Rep Type should align with your primary selling mode.

- **Agency** - contracted at a higher level to support a downline structure.
- **Field Broker** - Primarily selling locally at in person appointments
- **Telesales Broker** - Primarily selling over the phone as part of a call center structure

Sub Type Description

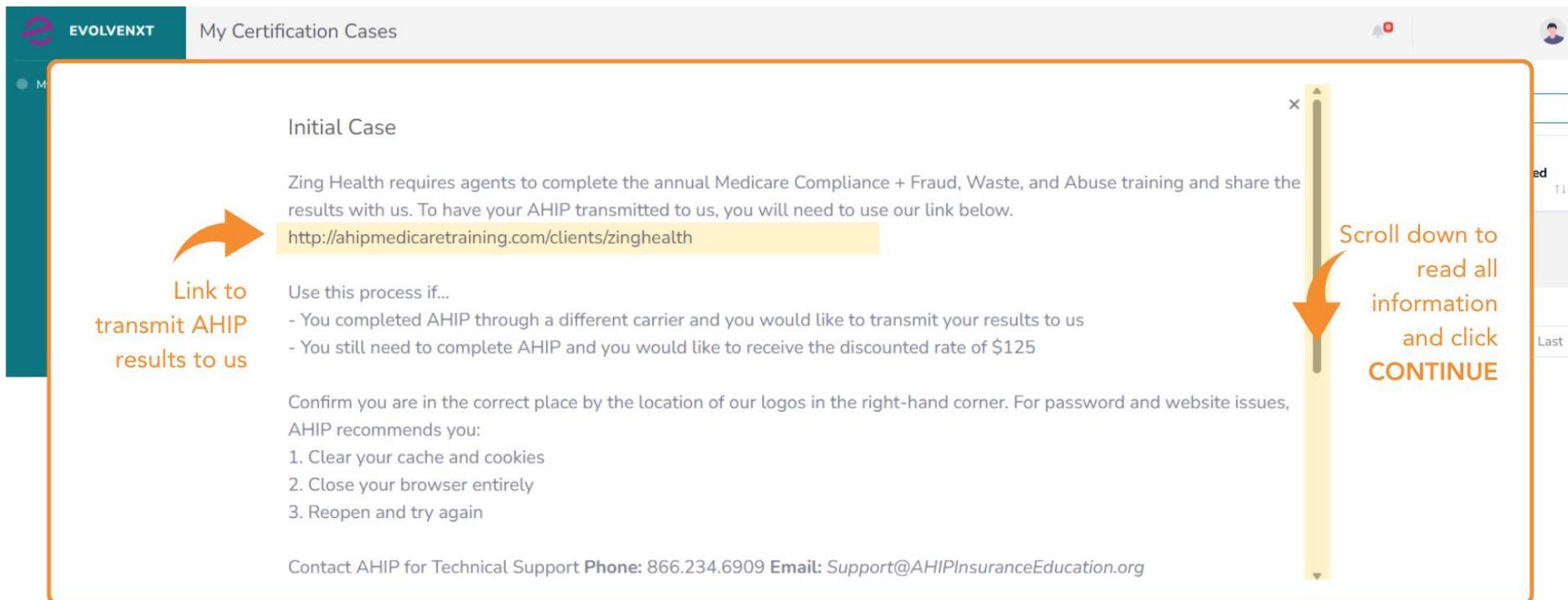
Your Sub Type dictates how you are paid. This should be confirmed annually with your upline.

- **Downline Only** - Broker has an upline, broker receives their own commissions.
- **Licensed Only Agent** - Broker has an upline, commissions are assigned to this upline. Broker does not own the book of business.
- **Dual Assignment** - Broker has an upline, commissions are assigned to this upline.
- **Principal - Selling** - Selling Principal of an Agency

Onboarding: AHIP Prompt

AHIP is not required to move forward in the onboarding process; however, it is required to become Ready-to-Sell. This prompt only appears during this step, so we strongly recommend transmitting your AHIP results prior to continuing.

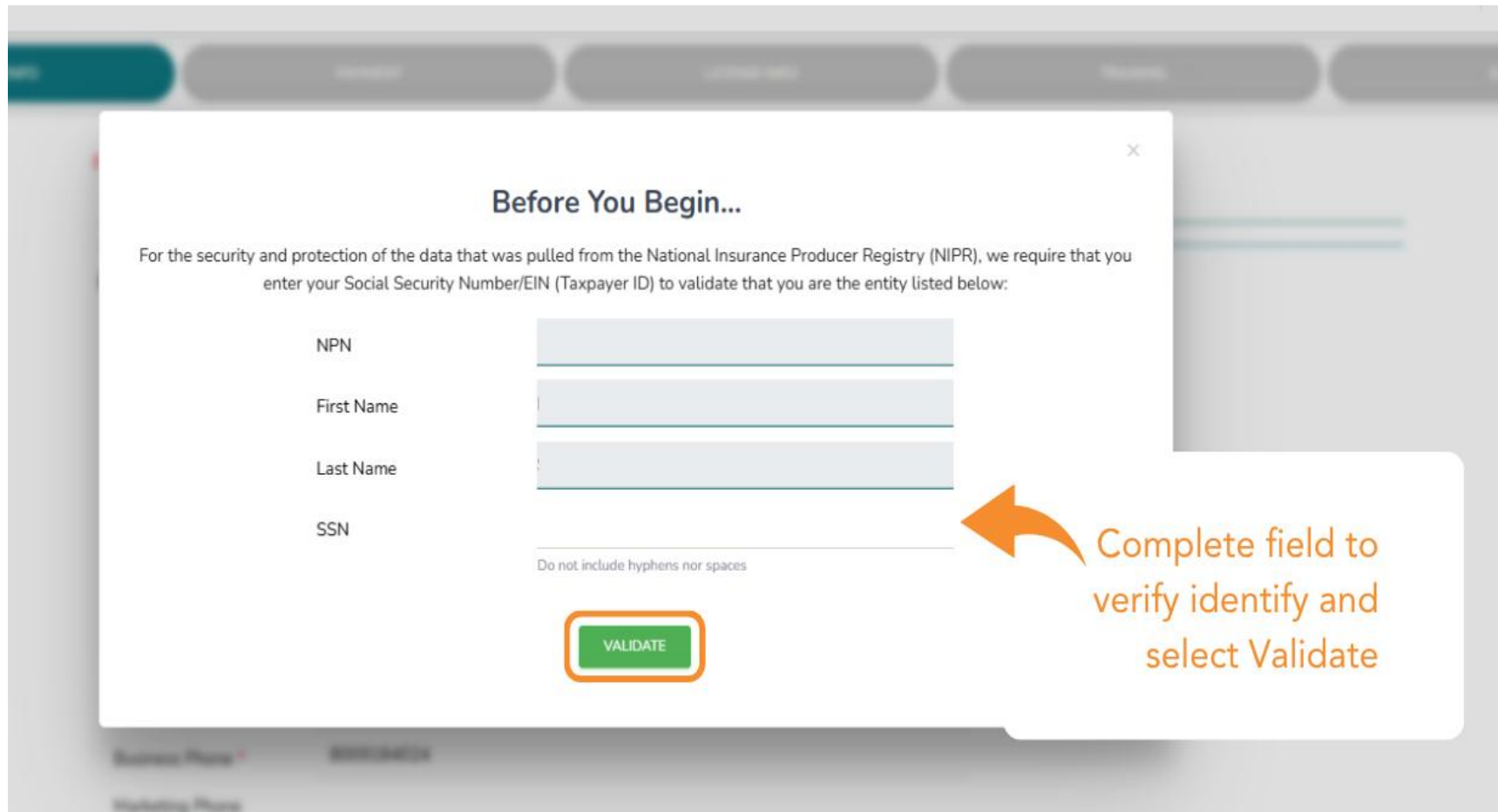
Please confirm you have the following information available: SSN, upline information, and payee/W-9 information, if applicable.



The screenshot shows a web interface for 'EVOLVENXT' with the title 'My Certification Cases'. A modal window titled 'Initial Case' is displayed. The text inside the modal reads: 'Zing Health requires agents to complete the annual Medicare Compliance + Fraud, Waste, and Abuse training and share the results with us. To have your AHIP transmitted to us, you will need to use our link below.' Below this is a highlighted link: <http://ahipmedicaretraining.com/clients/zinghealth>. An orange arrow points to this link with the text 'Link to transmit AHIP results to us'. Further down, it says 'Use this process if...' followed by two bullet points: '- You completed AHIP through a different carrier and you would like to transmit your results to us' and '- You still need to complete AHIP and you would like to receive the discounted rate of \$125'. Below that, it says 'Confirm you are in the correct place by the location of our logos in the right-hand corner. For password and website issues, AHIP recommends you:' followed by a numbered list: '1. Clear your cache and cookies', '2. Close your browser entirely', and '3. Reopen and try again'. At the bottom, it provides contact information: 'Contact AHIP for Technical Support Phone: 866.234.6909 Email: Support@AHIPInsuranceEducation.org'. On the right side of the modal, there is a vertical scrollbar with an orange arrow pointing down and the text 'Scroll down to read all information and click CONTINUE'. The background shows a sidebar with a home icon and a user profile icon.

Onboarding: Security Validation

For the security and protection of the data that was pulled from the National Insurance Producer Registry (NIPR), we require that you enter your Social Security Number/EIN (Taxpayer ID) to validate that you are the entity listed below:



The screenshot shows a web browser window with a modal dialog box titled "Before You Begin...". The dialog contains the following text: "For the security and protection of the data that was pulled from the National Insurance Producer Registry (NIPR), we require that you enter your Social Security Number/EIN (Taxpayer ID) to validate that you are the entity listed below:". Below this text are four input fields labeled "NPN", "First Name", "Last Name", and "SSN". The "SSN" field has a note below it that says "Do not include hyphens nor spaces". At the bottom of the form is a green button labeled "VALIDATE". An orange callout box with an arrow points to the "SSN" field, containing the text "Complete field to verify identify and select Validate".

View may vary based on your representative type.

Onboarding: Contact Info

Please note: selecting ABORT at any point through this process will close out your invitation and a new one will need to be created.

EVOLVENXT My Certification Cases

NAVIGATION

- MY CERTIFICATION CASES
- REQUIRED TRAINING

CONTACT INFO PAYMENT LICENSE INFO TRAINING SUBMIT

Fields marked with an asterisk (*) are required.

Personal Information

First Name *
Middle Initial
Last Name *
Job Title
SSN *
NPN *
DOB *
Mobile Phone *
Business Phone *
Marketing Phone
Email *
Secondary Email

Primary Address Information

Address 1 *
Address 2

Complete all fields to include those required.

Scroll to complete all information and proceed

View may vary based on your representative type.

Onboarding: Payment

If you are not paid by Zing Health, this section will not be included.

EVOLVENXT My Certification Cases

NAVIGATION

- MY CERTIFICATION CASES
- REQUIRED TRAINING

CONTACT INFO **PAYMENT** LICENSE INFO TRAINING SUBMIT

Fields marked with an asterisk (*) are required.

Payee

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.

Do you want to declare a private company to be your payee? *

Banking Information

Payment Method --

ABORT CONTINUE

Complete all fields to include those required and then proceed.

If you own an agency and wish to have your commissions pay to that account, select YES here and complete additional tax questions.

Onboarding: License Info

Select the states you wish to sell. To support appointment cost management, we ask you only declare states where you have an active business need. You can update your declared states at any point.

EVOLVENXT My Certification Cases

NAVIGATION
● MY CERTIFICATION CASES
// REQUIRED TRAINING 1

CONTACT INFO PAYMENT **LICENSE INFO** TRAINING SUBMIT

License Information

The table below indicates all states where ZING sells products for each line of business. Please choose and declare your sales intent per line of business from the available state options.

Active : Our records show that you own a valid health license in this state.
Inactive : Our records show that you own a health license but it is not currently active.
No License Found: Our records show that you do not own any health license in this state.

I acknowledge if I do not currently own a license in a state where I intend to sell for Zing, I may still declare sales intent. However, I will need to acquire a license from that state's department of insurance before reaching ready to sell status in that state and able to receive commissions. If I do not meet those requirements any enrollment will be considered a contaminated sale and commissions will be forfeited for the life of the policy.

Zing Declared States

<input type="checkbox"/> IL - Illinois - Inactive License	<input type="checkbox"/> MS - Mississippi - No License Found
<input type="checkbox"/> IN - Indiana - No License Found	<input type="checkbox"/> OH - Ohio - No License Found
<input type="checkbox"/> MI - Michigan - No License Found	<input type="checkbox"/> TN - Tennessee - No License Found

ABORT **CONTINUE**

Check box for acknowledgement

Update selling states as desired

Click to CONTINUE to proceed

View may vary based on your representative type.

Onboarding: Assigned Training

The screenshot displays the 'My Certification Cases' interface. At the top, there is a navigation bar with tabs for 'CONTACT INFO', 'PAYMENT', 'LICENSE INFO', 'TRAINING' (highlighted with an orange border), and 'SUBMIT'. On the left, a teal sidebar contains the 'EVOLVENXT' logo, a 'NAVIGATION' menu with 'MY CERTIFICATION CASES' selected, and a 'REQUIRED TRAINING' indicator with a red exclamation mark. In the top right corner, there is a notification bell icon with a red '2' and a user profile icon. The main content area is titled 'Open Assigned Trainings' and contains a single task card for '2027 Zing Training' with a 'NOT STARTED' status. A dropdown arrow icon on the left of this card is highlighted with an orange box. Below this, a 'History' section shows 'No training available'. At the bottom center, there is a red 'ABORT' button.

Click to expand tasks



Onboarding: Assigned Training Start

Upon clicking "Start" you will be given an opportunity to study for the exam and download training materials.

EVOLVENXT

Required Training

NAVIGATION

- MY CERTIFICATION CASES
- REQUIRED TRAINING 1

Open Assigned Trainings

2027 Zing Training

Not Started

2027 Zing Training

Zing Health 2026-2027 Product Certification

START

Zing Health 2026-2027 Product Exam

LOCKED

you must first complete the above training component(s) to unlock this component.

History

No training available

Click to begin training.

Onboarding: Assigned Product Training

Zing Health 2026-2027 Product Certification

The screenshot shows a PDF viewer interface. The title bar reads '2026 Product Certification - Final.pdf' and shows '1 / 90' pages and '91%' zoom. The main content area displays a slide with a teal header '2026-2027' and a large teal box containing the text 'Product Training'. The Zing Health logo is visible in the bottom right corner of the slide. A sidebar on the left shows a list of slide thumbnails numbered 1 through 4. A toolbar at the top right of the viewer contains icons for download, print, and a menu.

Click to download pdf training slides



Once all material is viewed, click the X to close window

Scroll down to view training slides within the system

Onboarding: Advance to Exam

Upon clicking "Start" your exam will begin and will count towards an attempt, whether you finish it or not.
Please move forward only when you are ready.

The screenshot displays the 'My Certification Cases' page in the EVOLVENXT system. The page features a navigation bar with tabs for CONTACT INFO, PAYMENT, LICENSE INFO, TRAINING, and SUBMIT. The TRAINING tab is highlighted with an orange border. Below the navigation bar, the page is titled 'en Assigned Trainings'. There are two main training entries:

- 2027 Zing Training:** This entry is currently 'IN PROGRESS (50%)' and is highlighted with an orange box. An orange arrow points from the text 'View progress' to this box.
- 2026 Zing Training:** This entry is 'COMPLETED' and contains two sub-items:
 - Zing Health 2026-2027 Product Certification:** This sub-item is 'COMPLETED'.
 - Zing Health 2026-2027 Product Exam:** This sub-item has a 'START' button highlighted with an orange box. An orange arrow points from the text 'Advance to exam' to this button. Below the exam title, a note reads: 'You must first complete the above training component(s) to unlock this component.'

At the bottom of the page, there is a 'History' section which currently displays 'No training available'.

Onboarding: Product Exam

Exam consists of 25 questions. You must achieve a passing score of 85% or higher to successfully complete the training course. There are 3 attempts permitted. Be sure to answer all questions prior to selecting the Submit button.

Zing Health 2026-2027 Product Exam

The Mastery Exam consists of 25 questions. You must achieve a passing score of 85% or higher to successfully complete this training course. There are 3 attempt(s) permitted. Be sure to answer all questions prior to selecting the **Submit** button.

Please note: you may only attempt this exam 3 more time(s).

Track attempts

1.

2.

3.



Should you need to exit at any point, click the X and your answers will be saved.

Scroll down to view and answer all 25 questions. Once sure of your answers click **SUBMIT**



Onboarding: Exam Results - Passed

Zing Health 2026-2027 Product Exam

View exam results

Congratulations! You have passed the exam.

IMPORTANT! You MAY NOT market or sell Medicare products until you have satisfied all certification requirements. Please review your Dashboard to confirm your RTS status.

Below is a breakdown of all the questions you have answered. Please review the additional information provided for any questions answered incorrectly.

YOUR SCORE

100%

The required passing score is 85%

Click the X to close out. You will be able to review this again as needed.

Before exiting, scroll down to review the questions you answered incorrectly

Onboarding: Exam Results - Failed

If you do not pass the exam on the first try, it is encouraged to review the questions you answered incorrectly and reference the training materials before proceeding.

Zing Health 2026-2027 Product Exam

View exam results and remaining attempts

You did not pass the exam. You have 2 attempts remaining.

RETRY

When ready to retake the exam, select **RETRY**

Below is a breakdown of all the questions you have answered. Please review the additional information provided for any questions answered incorrectly.

YOUR SCORE

32%

The required passing score is 85%

4.

Click the X to close out. You will be able to review this again as needed.

Before retaking exam, scroll down to review the questions you answered incorrectly

The screenshot shows a web interface for exam results. At the top, the title is 'Zing Health 2026-2027 Product Exam'. Below the title, a message states 'You did not pass the exam. You have 2 attempts remaining.' A blue button labeled 'RETRY' is visible. A callout box points to the 'RETRY' button with the text 'When ready to retake the exam, select **RETRY**'. Below this, a message says 'Below is a breakdown of all the questions you have answered. Please review the additional information provided for any questions answered incorrectly.' A circular progress indicator shows '32%' with a note 'The required passing score is 85%'. A scroll bar on the right side of the page is highlighted with a yellow bar, and an arrow points to it with the text 'Before retaking exam, scroll down to review the questions you answered incorrectly'. At the top right of the page, there is a close button (an 'X' in a square) with an arrow pointing to it and the text 'Click the X to close out. You will be able to review this again as needed.' A home icon is visible in the bottom right corner of the page.

Onboarding: Assigned Training Complete

If a certificate of completion is needed, please print screen. A downloadable certificate is not provided.

The screenshot displays the 'My Certification Cases' page in the EVOLVENXT system. The page is divided into several sections:

- Header:** 'My Certification Cases' with a notification bell icon showing 2 alerts and a user profile icon.
- Navigation Tabs:** CONTACT INFO, PAYMENT, LICENSE INFO, **TRAINING** (highlighted with an orange border), and SUBMIT.
- Open Assigned Trainings:** A message box stating 'There are currently no required training courses assigned to you.'
- History:** A list of completed training courses. One entry is visible: '2027 Zing Training' with a 'COMPLETED' status. An orange arrow points to a dropdown arrow icon on the left of this entry with the text 'View Results Again'.
- Buttons:** 'ABORT' (red) and 'CONTINUE' (teal, highlighted with an orange border). An orange arrow points to the 'CONTINUE' button with the text 'Click to move forward'.

Onboarding: Agreement

After the onboarding process is complete, you will be able to download both the agreement and your W-9. Critical fields in the contract will be automatically filled in.

The screenshot displays the EVOLVENXT user interface for 'My Certification Cases'. The top navigation bar includes 'CONTACT INFO', 'PAYMENT', 'LICENSE INFO', 'TRAINING', and a highlighted 'SUBMIT' button. Below the navigation bar, a message states: 'Fields marked with an asterisk (*) are required. Please click on the links below to review the documents and digitally sign as appropriate'. The main content area shows a document viewer for 'obdoc_download.htm' at 94% zoom. The document is titled 'ZING HEALTH INDEPENDENT BROKER AGREEMENT' and contains the following text:

ZING HEALTH
INDEPENDENT BROKER AGREEMENT

This Independent Broker Agreement ("Agreement") is entered into by and between Zing Health of Michigan, Inc., on behalf of itself and its subsidiaries and affiliates (collectively, "Zing Health"), and _____ ("Agent"). This Agreement shall be effective as of _____ ("Effective Date"). Zing Health and Agent each may be referred to herein as a "Party" or collectively as the "Parties."

RECITALS

WHEREAS, Zing Health has a contract with Centers for Medicare and Medicaid Services (CMS) to offer Medicare Advantage Plans to Medicare beneficiaries;

WHEREAS, Zing Health seeks to engage Agent to provide certain marketing, sales and enrollment services in connection with Zing Health's Medicare Advantage Plans; and

WHEREAS, Agent seeks to provide such marketing, sales and enrollment services, as well as related administrative services, to and on behalf of Zing Health.

NOW, THEREFORE, in consideration of the mutual covenants herein contained, acknowledged to be good and sufficient consideration, the Parties do hereby agree as follows:

ARTICLE 1

On the right side of the document viewer, a vertical scroll bar is visible. An orange arrow points to the scroll bar with the text: 'Scroll to view all information and sign'.

View may vary based on your representative type.

Onboarding: Agreement Signature Boxes

READ and
CHECK all
boxes.

- 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.
- I have read and understand the Zing Code of Conduct.
- I acknowledge that I have reviewed and fully understand the differences between Zing Health's plan offerings and how each plan type functions. Specifically, I understand: HMO Select Plans, PPO Open Choice Plans, PSP Elite Plans (Provider Specific Plans), and C-SNPs (Chronic Special Needs Plans). I confirm that I am confident in my ability to distinguish between these plan types and accurately explain them to Medicare beneficiaries.

Electronically sign
with finger, stylus, or
mouse



Please sign your name in the space below.

CLEAR

ABORT

SUBMIT



Click to
SUBMIT



Onboarding: Submission Successful

The screenshot shows the EVOLVENXT user interface. On the left is a teal navigation sidebar with the EVOLVENXT logo, a 'NAVIGATION' section containing 'MY CERTIFICATION CASES' and 'REQUIRED TRAINING 1', and a back arrow. The main header area includes the title 'My Certification Cases', a notification bell with a '2' badge, and a user profile icon. Below the header is a horizontal progress bar with five steps: 'CONTACT INFO', 'PAYMENT', 'LICENSE INFO', 'TRAINING', and 'SUBMIT'. The 'SUBMIT' step is highlighted with an orange border. The main content area displays a green 'Submission Successful!' message, a horizontal line, and the text 'Thank you for submitting your certification workflow.' A home icon is located in the bottom right corner of the page.

Onboarding: Status

Once your onboarding case has been submitted, it will move through the background check and appointment review process for any states where an appointment is required.

This process typically takes 24 to 36 hours. If your case has not been approved after that timeframe, please contact Zing Health Broker Support.

NAVIGATION
MY CERTIFICATION CASES

My Certification Cases

Search by Name: _____

Name	LOB	Year	Type	NPN	Sales Level	Affiliated Agency/Team	Submitted By	Creation Date	Status
	Medicare Advantage	2026	Initial		Agent - 01			06/04/2025	Pending Background Check

FIRST PREVIOUS 1 NEXT LAST

Selecting My Certification Cases will allow you to view your status



Recertification

[Current Partner Invitation](#)

[AHIP Prompt](#)

[Assigned Product Training](#)

[Product Exam](#)

Recertification: Current Partner

Once a recertification invitation has been generated, you will receive an email from donotreply@evolvenxt.com

Note: Recertification cases will expire December 31. If you are not RTS by that date, you will not be eligible to receive renewal commissions.

From: donotreply@evolvenxt.com
Subject: Zing Health Recertification Invitation

Dear {broker name},

You are invited to recertify with Zing Health to market our Medicare Advantage plans.

To access your recertification, please log in using your existing EvolveNXT credentials by clicking the link below:

Recertification URL:

<https://zing.evolvenxt.com/login>.

Please note: This invitation will expire on December 31. If you are not ready-to-sell by that date, you will not be eligible to receive renewal commissions.

IMPORTANT: Before you can be marked as Ready to Sell (RTS), you must transmit your AHIP certification to Zing Health using the following link:

<http://ahipmedicaretraining.com/clients/zinghealth>

If you have trouble accessing the EvolveNXT portal, please use the Lost Password function.

For further assistance, contact us at Brokers@myzinghealth.com or call 844-946-4226 (Monday–Friday, 8 AM – 5 PM CT).

If you are unsure why you are receiving this email, please reach out to your Zing Health upline.

We look forward to your continued partnership!

Thank you,

Zing Health



Recertification: Current Partner Process

Access your recertification by following the red prompts under My Credentials. If you are an Agency Principal, you will complete this step for your agency as well.

Before beginning, verify your Broker Type, Broker Sub Type and Upline are accurate. ***If there are errors, do not proceed and contact Zing Health Broker Support for assistance.***

If all information is correct, select "START" to begin.

My Certification Cases

LoB	Type	Status	Email	NPN	Broker Type	Broker Sub Type	Sales Level	Name	Upline Name	Creation Date	Email Send Date	Year	Submitted By
Medicare Advantage	Recertify	Created - New			Field Broker	Downline Only	Agent - 01			06/23/2026	06/23/2026	2027	
Medicare Advantage	Recertify	Approved			Field Broker	Downline	Agent -						
Medicare Advantage	Recertify	Approved			Field Broker								
Medicare Advantage	Initial	Approved			Field Broker								

Showing 1 to 4 of

Rep Type Description
Your Rep Type should align with your primary selling mode.

- **Agency** - contracted at a higher level to support a downline structure.
- **Field Broker** - Primarily selling locally at in person appointments
- **Telesales Broker** - Primarily selling over the phone as part of a call center structure

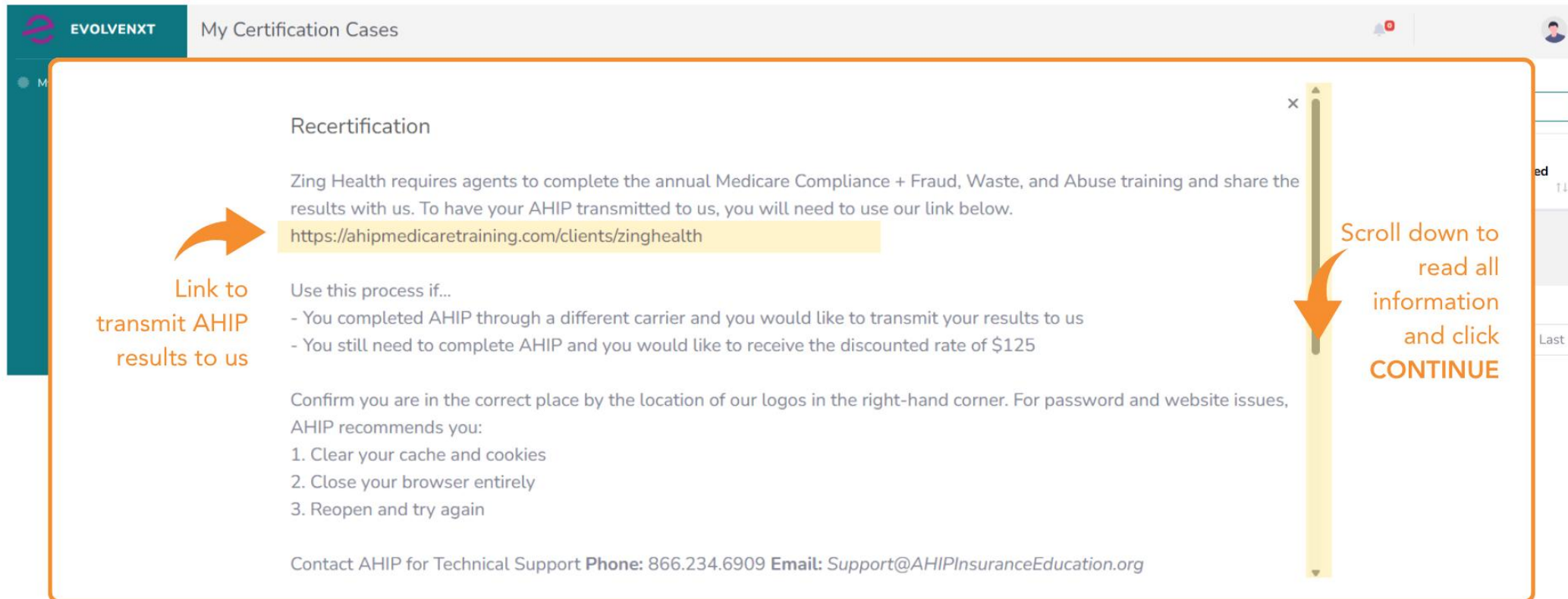
Sub Type Description
Your Sub Type dictates how you are paid. This should be confirmed annually with your upline.

- **Downline Only** - Broker has an upline, broker receives their own commissions.
- **Licensed Only Agent** - Broker has an upline, commissions are assigned to this upline. Broker does not own the book of business.
- **Dual Assignment** - Broker has an upline, commissions are assigned to this upline.
- **Principal - Selling** - Selling Principal of an Agency

View may vary based on your representative type.

Recertification: AHIP Prompt

AHIP is not required to move forward through the recertification process; however, it is required to become Ready-to-Sell. This prompt only appears during this step, so we strongly recommend transmitting your AHIP results prior to continuing.



EVOLVENXT My Certification Cases

Recertification

Zing Health requires agents to complete the annual Medicare Compliance + Fraud, Waste, and Abuse training and share the results with us. To have your AHIP transmitted to us, you will need to use our link below.

<https://ahipmedicaretraining.com/clients/zinghealth>

Use this process if...

- You completed AHIP through a different carrier and you would like to transmit your results to us
- You still need to complete AHIP and you would like to receive the discounted rate of \$125

Confirm you are in the correct place by the location of our logos in the right-hand corner. For password and website issues, AHIP recommends you:

1. Clear your cache and cookies
2. Close your browser entirely
3. Reopen and try again

Contact AHIP for Technical Support **Phone:** 866.234.6909 **Email:** Support@AHIPInsuranceEducation.org

Link to transmit AHIP results to us

Scroll down to read all information and click **CONTINUE**

Recertification: Contact Info

EVOLVENXT My Certification Cases

NAVIGATION

- MY CERTIFICATION CASES
- REQUIRED TRAINING 1

CONTACT INFO PAYMENT LICENSE INFO TRAINING SUBMIT

Fields marked with an asterisk (*) are required.

Personal Information

First Name *
Middle Initial
Last Name *
Job Title
SSN *
NPN *
DOB *
Mobile Phone *
Business Phone *
Marketing Phone
Email *
Secondary Email

Primary Address Information

Address 1 *
Address 2

Complete all fields to include those required.

Scroll to complete all information and proceed

Recertification: Payment

EVOLVENXT My Certification Cases

NAVIGATION

- MY CERTIFICATION CASES
- REQUIRED TRAINING

CONTACT INFO **PAYMENT** LICENSE INFO TRAINING SUBMIT

Fields marked with an asterisk (*) are required.

Payee

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.

Do you want to declare a private company to be your payee? *

Banking Information

Payment Method --

CONTINUE

Complete all fields to include those required and then proceed.

If you own an agency and wish to have your commissions pay to that account, select YES here and complete additional tax questions.

Recertification: License Info

Verify the states you wish to sell in. To support appointment cost management, we ask you only declare states where you have an active business need. You can update your declared states at any point throughout the year.

EVOLVENXT My Certification Cases

NAVIGATION
● MY CERTIFICATION CASES
// REQUIRED TRAINING 1

CONTACT INFO PAYMENT **LICENSE INFO** TRAINING SUBMIT

License Information

The table below indicates all states where ZING sells products for each line of business. Please choose and declare your sales intent per line of business from the available state options.

Active : Our records show that you own a valid health license in this state.
Inactive : Our records show that you own a health license but it is not currently active.
No License Found: Our records show that you do not own any health license in this state.

I acknowledge if I do not currently own a license in a state where I intend to sell for Zing, I may still declare sales intent. However, I will need to acquire a license from that state's department of insurance before reaching ready to sell status in that state and able to receive commissions. If I do not meet those requirements any enrollment will be considered a contaminated sale and commissions will be forfeited for the life of the policy.

Zing Declared States

<input type="checkbox"/> IL - Illinois - Inactive License	<input type="checkbox"/> MS - Mississippi - No License Found
<input type="checkbox"/> IN - Indiana - No License Found	<input type="checkbox"/> OH - Ohio - No License Found
<input type="checkbox"/> MI - Michigan - No License Found	<input type="checkbox"/> TN - Tennessee - No License Found

CONTINUE

Check box for acknowledgement

Update selling states as desired

Click to CONTINUE to proceed

Recertification: Assigned Training Start

Upon clicking "Start" you will be given an opportunity to study for the exam and download training materials.

EVOLVENXT

Required Training

Open Assigned Trainings

Not Started 2027 Zing Training

2027 Zing Training

START

Zing Health 2026-2027 Product Certification

LOCKED

Zing Health 2026-2027 Product Exam
You must first complete the above training component(s) to unlock this component.

History

Completed 2026 Zing Training

Click to begin training.

Recertification: Assigned Product Training

Zing Health 2026-2027 Product Certification

2026 Product Certification - Final.pdf | 1 / 90 | 91% | [Download] [Print] [More]

2026-2027

Product Training

Zing HEALTH™

Slide Number	Slide Title
1	Product Training
2	Welcome to Zing Health
3	Table of Contents
4	Agenda/Requirements

Click to download pdf training slides



Once all material is viewed, click the X to close window

Scroll down to view training slides within the system

Recertification: Advance to Exam

Upon clicking "Start" your exam will begin and will count towards an attempt, whether you finish it or not. **Please move forward only when you are ready.**

The screenshot displays the 'My Certification Cases' page in the EVOLVENXT system. The page features a navigation bar with tabs for CONTACT INFO, PAYMENT, LICENSE INFO, TRAINING (highlighted with an orange border), and SUBMIT. Below the navigation bar, the 'en Assigned Trainings' section lists two training items:

- 2027 Zing Training**: Status is 'IN PROGRESS (50%)'.
- 2026 Zing Training**: Contains two sub-items:
 - Zing Health 2026-2027 Product Certification**: Status is 'COMPLETED'.
 - Zing Health 2026-2027 Product Exam**: Status is 'START' (highlighted with an orange border). A note below it reads: "You must first complete the above training component(s) to unlock this component."

At the bottom, the 'History' section shows a dropdown menu with a 'Completed' status for '2026 Zing Training'.

Two callout boxes with orange arrows provide instructions: 'View progress' points to the 'IN PROGRESS (50%)' status of the 2027 training, and 'Advance to exam' points to the 'START' button of the 2026 exam.

Recertification: Product Exam

Exam consists of 25 questions. You must achieve a passing score of 85% or higher to successfully complete the training course. There are 3 attempts permitted. Be sure to answer all questions prior to selecting the Submit button.

Zing Health 2026-2027 Product Exam

The Mastery Exam consists of 25 questions. You must achieve a passing score of 85% or higher to successfully complete this training course. There are 3 attempt(s) permitted. Be sure to answer all questions prior to selecting the **Submit** button.

Please note: you may only attempt this exam 3 more time(s).

Track attempts

1.

2.

3.



Should you need to exit at any point, click the X and your answers will be saved.

Scroll down to view and answer all 25 questions. Once sure of your answers click SUBMIT



Recertification: Exam Results - Passed

Zing Health 2026-2027 Product Exam

View exam results

Congratulations! You have passed the exam.

IMPORTANT! You MAY NOT market or sell Medicare products until you have satisfied all certification requirements. Please review your Dashboard to confirm your RTS status.

Below is a breakdown of all the questions you have answered. Please review the additional information provided for any questions answered incorrectly.

YOUR SCORE

100%

The required passing score is 85%

Click the X to close out. You will be able to review this again as needed.

Before exiting, scroll down to review the questions you answered incorrectly

Recertification: Exam Results - Failed

If you do not pass the exam on the first try, it is encouraged to review the questions you answered incorrectly and reference the training materials before proceeding.

Zing Health 2026-2027 Product Exam

View exam results and remaining attempts → You did not pass the exam. You have 2 attempts remaining.

RETRY ← When ready to retake the exam, select **RETRY**

Below is a breakdown of all the questions you have answered. Please review the additional information provided for any questions answered incorrectly.

YOUR SCORE

32%

The required passing score is 85%

4.

Click the X to close out. You will be able to review this again as needed.

Before retaking exam, scroll down to review the questions you answered incorrectly

Recertification: Assigned Training Complete

If a certificate of completion is needed, please take a screenshot. A downloadable certificate is not provided.

The screenshot displays the 'My Certification Cases' page in the EVOLVENXT system. The page has a teal sidebar on the left with navigation options: 'NAVIGATION', 'MY CERTIFICATION CASES', and 'REQUIRED TRAINING' (with a red notification icon). The main content area is titled 'My Certification Cases' and features a horizontal menu with tabs for 'CONTACT INFO', 'PAYMENT', 'LICENSE INFO', 'TRAINING' (highlighted with an orange border), and 'SUBMIT'. Below the menu, there are two sections: 'Open Assigned Trainings' and 'History'. The 'Open Assigned Trainings' section contains a message: 'There are currently no required training courses assigned to you.' The 'History' section shows a single entry for '2027 Zing Training' with a green 'COMPLETED' status. An orange arrow points from the text 'View Results Again' to a small 'x' icon on the left of the training entry. Another orange arrow points from the text 'Click to move forward' to a 'CONTINUE' button located below the training entry. A home icon is visible in the bottom right corner of the page.

Recertification: Agreement

After the recertification process is complete, you will be able to download both the agreement and your W-9. Critical fields in the contract will be automatically filled in.

Attention agency partners: If you have a separately executed redlined agreement, that agreement will control in the event of any conflict. Completing the agreement in the system is still required as part of the Ready-to-Sell process.

The screenshot displays the EVOLVENXT user interface for 'My Certification Cases'. The navigation menu on the left includes 'MY CERTIFICATION CASES' and 'REQUIRED TRAINING'. The main content area has tabs for 'CONTACT INFO', 'PAYMENT', 'LICENSE INFO', 'TRAINING', and 'SUBMIT'. The 'SUBMIT' tab is highlighted with an orange border. Below the tabs, a red message states: 'Fields marked with an asterisk (*) are required. Please click on the links below to review the documents and digitally sign as appropriate.' Underneath, the 'Submit Onboarding' section shows a document viewer for 'obdoc_download.htm'. The document is a 'Zing HEALTH INDEPENDENT BROKER AGREEMENT' with sections for 'RECITALS' and 'ARTICLE 1'. A yellow arrow points to the document viewer with the text 'Scroll to view all information and sign'.

Recertification: Agreement

READ and
CHECK all
boxes.

- 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.
- I have read and understand the Zing Code of Conduct.
- I acknowledge that I have reviewed and fully understand the differences between Zing Health's plan offerings and how each plan type functions. Specifically, I understand: HMO Select Plans, PPO Open Choice Plans, PSP Elite Plans (Provider Specific Plans), and C-SNPs (Chronic Special Needs Plans). I confirm that I am confident in my ability to distinguish between these plan types and accurately explain them to Medicare beneficiaries.

Electronically sign
with finger, stylus, or
mouse



Please sign your name in the space below.

CLEAR

Click to
SUBMIT

SUBMIT



Recertification: Submission Successful

The screenshot displays the EVOLVENXT user interface for 'My Certification Cases'. The left sidebar contains the EVOLVENXT logo, a navigation menu with 'MY CERTIFICATION CASES' selected, and a 'REQUIRED TRAINING' indicator with a red notification icon. The main content area features a progress bar with steps: CONTACT INFO, PAYMENT, LICENSE INFO, TRAINING, and SUBMIT (highlighted with an orange border). Below the progress bar, a green heading reads 'Submission Successful!'. The text below states: 'Thank you for submitting your certification workflow. For the next step of your certification, you need to complete your training.' A teal button labeled 'GO TO TRAINING' is centered below this text. Further down, a message says: 'Once all certification requirements are met, you will become Active:Certified and will be ready to sell.' At the bottom, there are three input fields labeled 'Broker Name', 'Email', and 'NPN'. In the top right corner, there is a notification bell icon with a red '2' and a user profile icon. A home icon is visible on the far right edge of the page.

Broker Portal



[Dashboard](#)

[Ready to Sell Status](#)

[Commission Statements](#)

[Book of Business](#)

[Application Status](#)

[Docs & Resources](#)

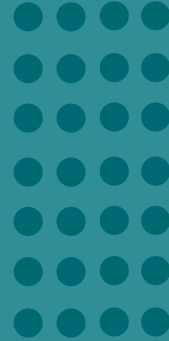
[My Credentials](#)

[My Account](#)

[My Hierarchy Info](#)

[Workflows](#)

[Agency Features](#)



Broker Portal: Dashboard - Overview

When you log into the portal, you are directed straight to your dashboard. This is divided into three categories: Overview (default), Enrollments, and Statements.

Overview shows your Current Status with Zing, your AEP Sales Eligibility, access to Quick Links we've loaded for you, and your credentials.

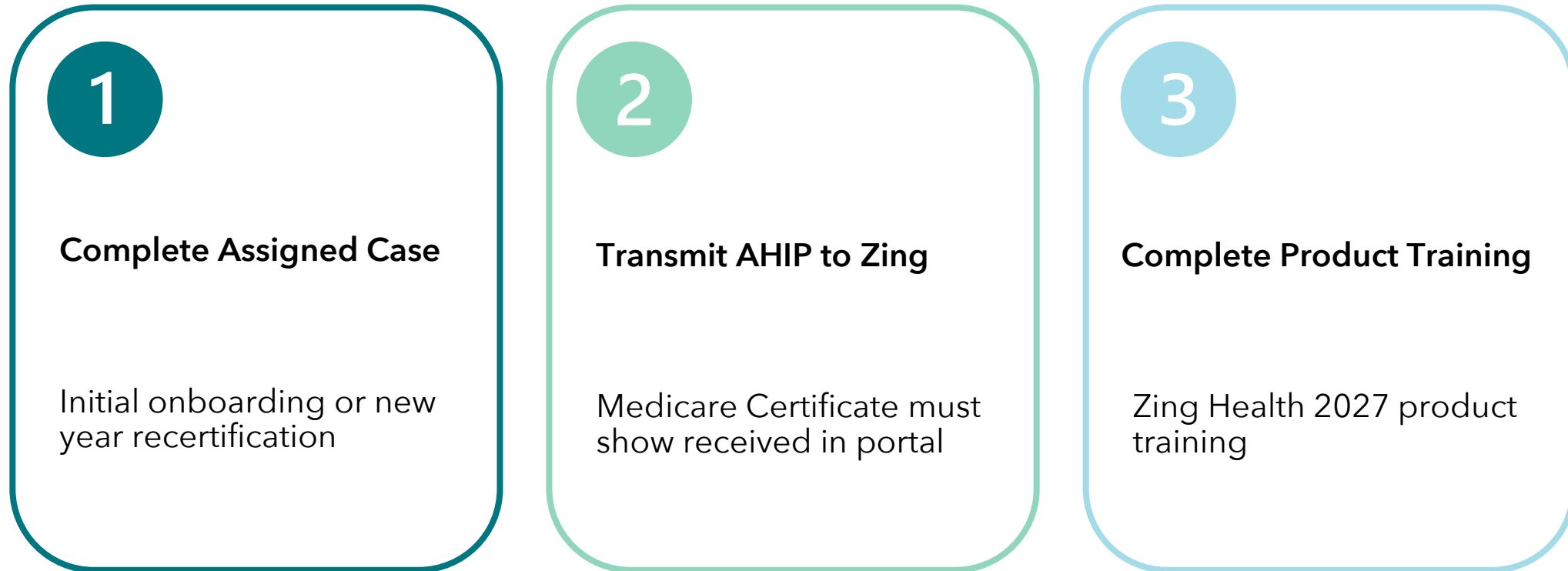
The screenshot shows the EVOLVENXT Broker Portal Dashboard. The 'Overview' tab is selected and highlighted with an orange border. The dashboard is divided into three main sections: Overview, Enrollments, and Statements. The Overview section contains three cards: 'Current Status' showing 'Zing - Active/Certified', '2027 AEP Sales Eligibility' with two green checkmarks for '2027 Recertification Approved' and '2027 Training Certificate Completed', and 'Quick Links'. A green callout box with an arrow points to the 'Quick Links' card, containing the text 'Click **Quick Links** to expand and view links'. Below these cards is a 'Credentials' table with the following data:

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

View may vary based on your representative type.

Broker Portal: Dashboard - Ready to Sell (RTS) Status

There are three steps to becoming RTS with Zing Health.



An agent is fully RTS only when all three items show complete in the broker portal.

Broker Portal: Dashboard - RTS Status Recertification Pending

Use the broker portal dashboard as your quick status check before selling Zing Health plans.

2027 AEP Sales Eligibility

- ❗ 2027 Recertification Pending
- ✅ 2027 Training Certificate Completed
- ✅ 2027 Product Training Completed

❗ 2027 Recertification Pending

What to Check:

Open **My Certification Cases** and review your pending assignments. Pay close attention to the plan year for the completed assignment.

If you do not have a 2027 recertification case assigned, please email brokers@myzinghealth.com.

1 Complete Assigned Case

2 Transmit AHIP to Zing

3 Complete Product Training

Broker Portal: Dashboard - RTS Status Training Cert Pending

Use the broker portal dashboard as your quick status check before selling Zing Health plans.

2027 AEP Sales Eligibility

- ✓ 2027 Recertification Completed
- ! 2027 Training Certificate Pending
- ✓ 2027 Product Training Completed

! 2027 Training Certificate Pending

What to Check:

Open **Training Info** found under **My Credentials > My Status & Credentials**. Once there, look for your 2027 Medicare Certificate. If you do not see it listed, you must transmit it to us.

Use this unique Zing link to transmit your AHIP:
<http://ahipmedicaretraining.com/clients/zinghealth>

💡 Find this link on the dashboard under **Quick Links**

1 Complete Assigned Case

2 Transmit AHIP to Zing

3 Complete Product Training

Broker Portal: Dashboard - RTS Status Product Training Pending

Use the broker portal dashboard as your quick status check before selling Zing Health plans.

2027 AEP Sales Eligibility

- ✓ 2027 Recertification Completed
- ✓ 2027 Training Certificate Completed
- ! 2027 Product Training Pending

! 2027 Product Training Pending

What to Check:

Open **Required Training** and successfully complete the assigned training for the 2027 plan year.

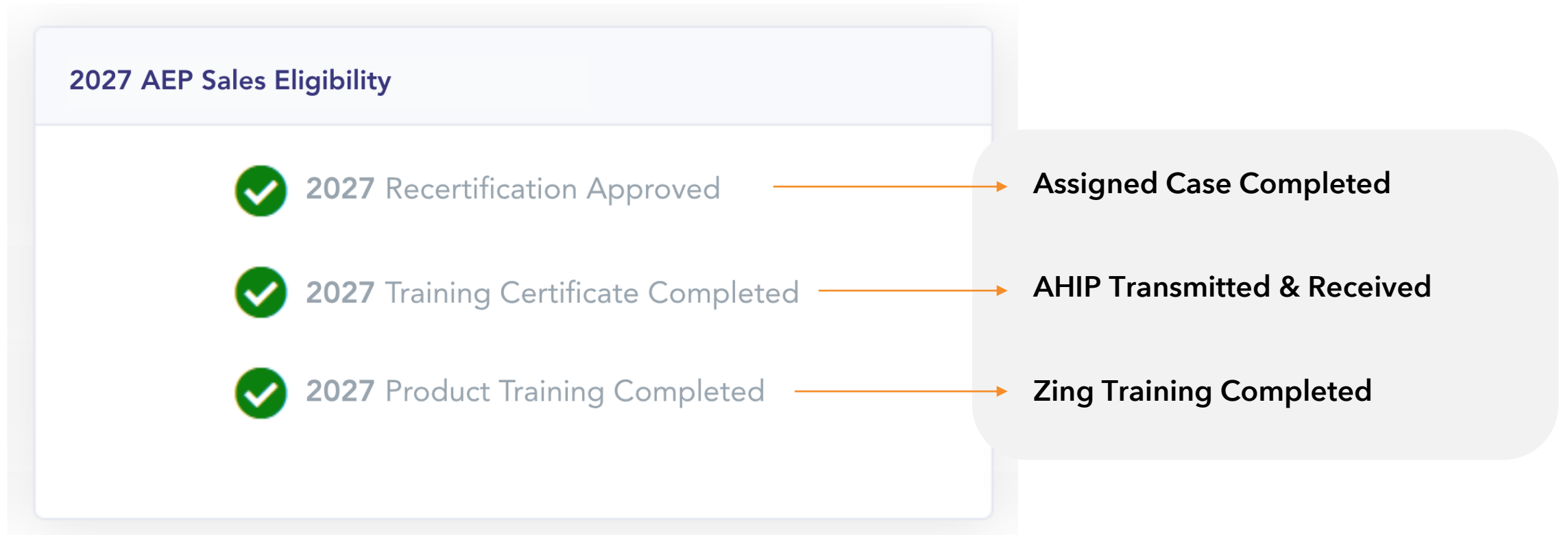
1 Complete Assigned Case

2 Transmit AHIP to Zing

3 Complete Product Training

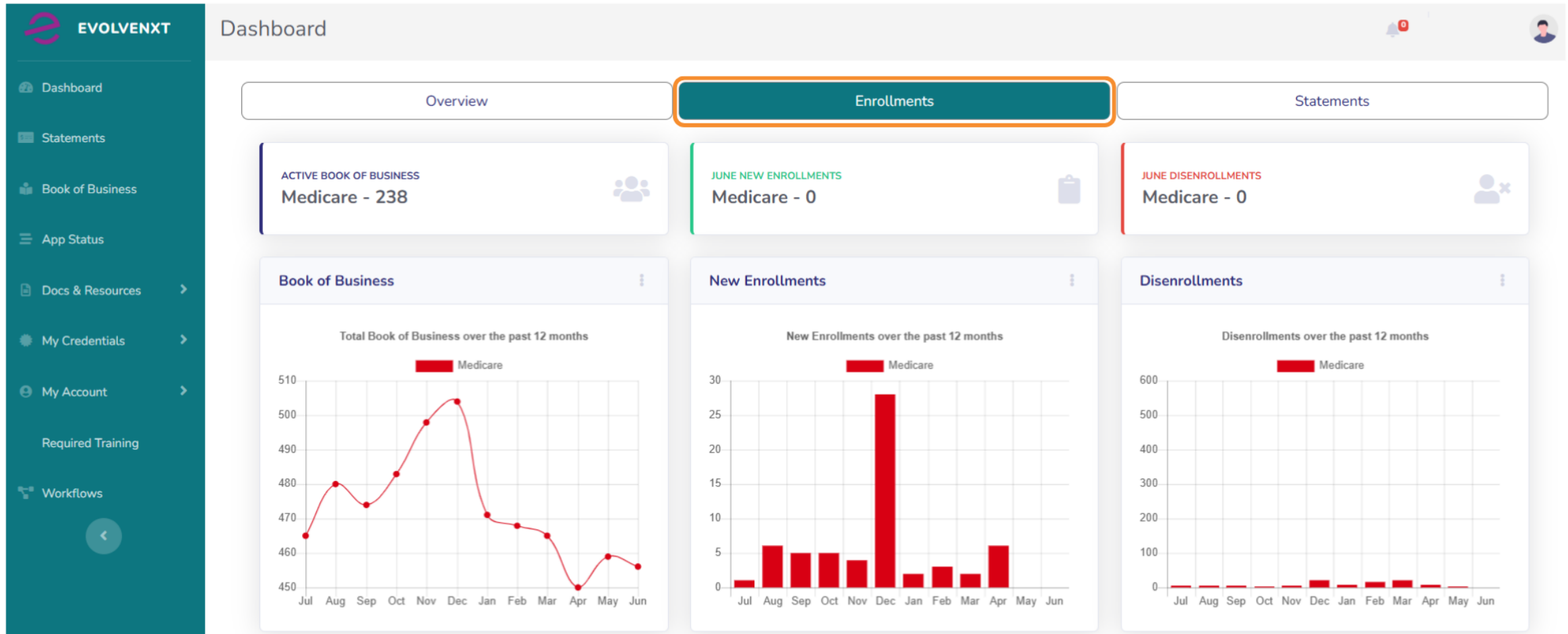
Broker Portal: Dashboard - RTS Status Confirmation

Use the broker portal dashboard as your quick status check before selling Zing Health plans.



Broker Portal: Dashboard - Enrollments

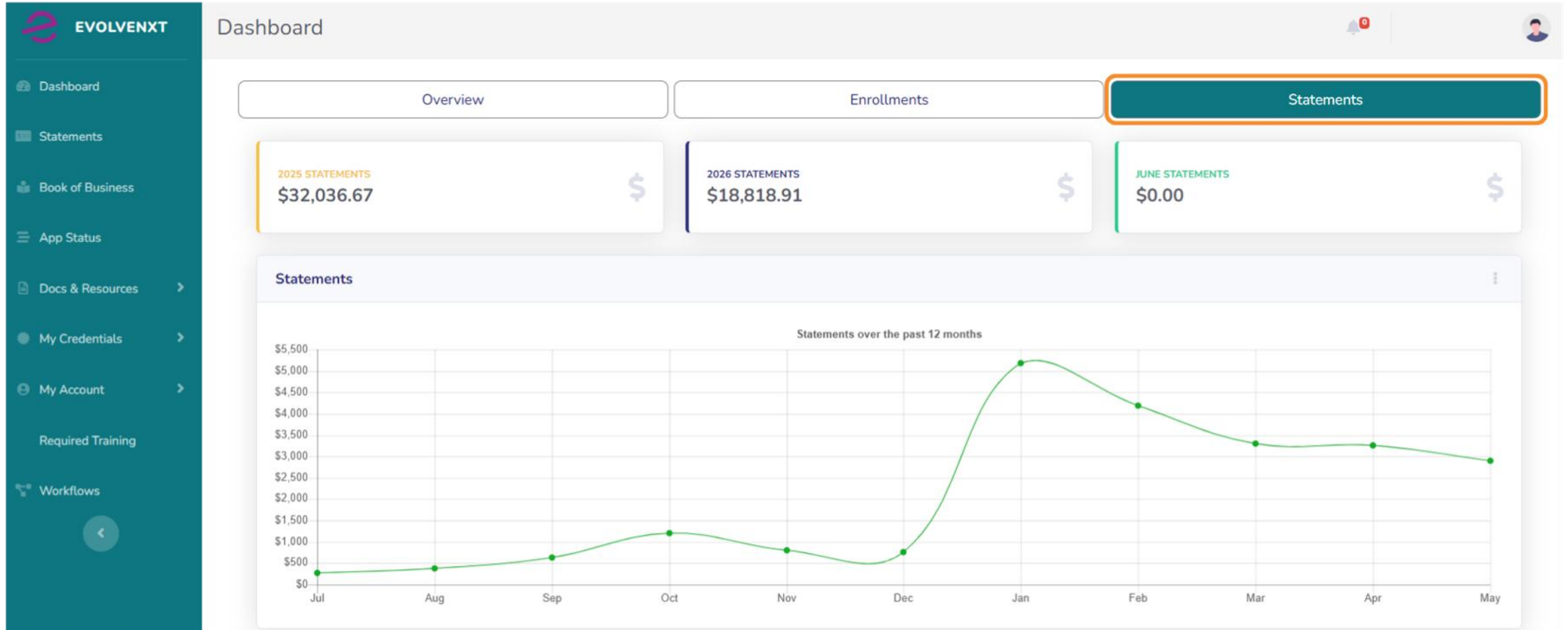
Enrollments is a summary view at your Active Book of Business, New Enrollments, and Disenrollments.



View may vary based on your representative type.

Broker Portal: Dashboard - Statements

Statements is a summary view of your prior year statements, current year statements, and current month statements.



View may vary based on your representative type.

Broker Portal: Commission Statements

If your commissions are paid to you by the health plan, you can view your commission statements. Once a statement is published, a new row with all details pertaining to that specific payment will be displayed. The Statement Date (Stmt. Date) corresponds with the payment date.

EVOLVENXT Statements

Statement From * Statement To *

SEARCH

Show entries

Tl	Stmt #	Description	Stmt Date	Payee	Credits	Debits	Balance	Amount	Pmt Date	Pmt Type
Excel PDF	23171	HRA 062725	06/27/2025		\$250.00	-\$100.00	\$0.00	\$150.00		AP
Excel PDF	20491	HRA 04252024	04/25/2025		\$1,000.00	-\$100.00	\$0.00	\$900.00		AP
Excel PDF	18074	HRA 032825	03/28/2025		\$1,400.00	-\$200.00	\$0.00	\$1,200.00		AP
Excel PDF	15159	HRA 02/28/2025	02/28/2025		\$350.00	-\$150.00	\$0.00	\$200.00		AP
Excel	13596	HRA 01/31/2025	01/31/2025		\$2,525.00	\$0.00	\$0.00	\$2,525.00		AP

Showing 1 to 10 of 27 entries

Previous 1 2 3 Next

View may vary based on your representative type.

Broker Portal: Book of Business

The **Book of Business** tab will display all members where you are the Agent of Record. Enter one of the filters below to look for a specific member or search for members by category.

Once the search criteria are entered, select **Search** to generate results. **Select Download** at any time to export your Book of Business into Excel.

Member ID Cards are available to download by clicking on the **ID Card** icon next to member name.

The screenshot displays the 'Book of Business' interface in the EVOLVENXT portal. It features a sidebar with navigation options: Dashboard, Statements, Book of Business (selected), App Status, Docs & Resources, My Credentials, My Account, Required Training, and Workflows. The main content area includes search filters for Member ID, First Name, Last Name, Member MBI, Active Member, Rep ID, Effective From, Effective To, Termination From, and Termination To. There are 'SEARCH' and 'DOWNLOAD' buttons, and a 'Last Data Load' timestamp of 06/04/2026 4:47 AM. Below the filters, a table shows 10 entries. Each row includes an 'ID Card' icon, Member ID, MBI, First Name, Last Name, Phone, Effective Date, Termination Date, Contract, Plan, and Mem Year. The table is paginated to show 1 to 10 of 123 entries.

ID Card	Member ID	MBI	First Name	Last Name	Phone	Effective Date	Termination Date	Contract	Plan	Mem Year
						01/01/2026		H4624	028	4
						01/01/2026		H4624	028	2
						01/01/2026		H4624	028	2
						01/01/2026		H4624	028	3
						01/01/2026		H4624	028	3
						01/01/2026		H4624	028	3
						04/01/2024	05/31/2024	H4624	028	3
						01/01/2026		H4624	028	3

Broker Portal: Application Status

The **App Status** tab will display all your submitted applications. Enter one of the filters below to look for a specific member or search for members by category. Once the search criteria are entered, select **Search** to generate results. Select **Download** at any time to export your applications submitted into Excel.

The **Status** column is a very useful resource as you track the application through the enrollment process, especially for your C-SNP applications and the required verification.

Click the **i** to view the status code and status description.

The screenshot shows the EVOLVENXT App Status interface. It features a search form with fields for Application ID, MBI, Application From, Application To, First Name, Last Name, Status, and Broker ID. Below the form are 'SEARCH' and 'DOWNLOAD' buttons. A table displays application records with columns for Application ID, MBI, Application Date, First Name, Last Name, Status, and Broker ID. The Status column is highlighted with an orange box, and an information icon (i) is visible next to the Status header.

Application ID	MBI	Application Date	First Name	Last Name	Status i	Broker ID
		02/11/26			Application Completed - CSNP Verification Pending	
		03/30/26			Application Completed - CSNP Verification Pending	
		04/22/26			Application Completed - CSNP Verified	
		02/16/26			Application Completed - CSNP Verified	
		01/02/26			Application Completed - CSNP Verified	
		05/21/26			Application Completed - CSNP Verification Pending	
		04/29/26			Application Completed - CSNP Verified	
		03/10/26			Application Completed - CSNP Verified	
		03/20/26			Application Completed - CSNP Verified	
		03/20/26			Application Completed - CSNP Verified	

Broker Portal: Docs & Resources

The **Docs & Resources** section allows you to view shared resources that the health plan has loaded along with executed agreements.

Shared Resources is where you will find information like the annual comp addendum, certification guides, and commission pay schedules.

My Documents stores your executed contract agreements, signed W-9s and additional documents that may have been shared with us.

The image displays two screenshots of the EVOLVENXT Broker Portal interface. The top screenshot shows the 'Shared Resources' section, and the bottom screenshot shows the 'My Documents' section. Both screenshots feature a teal sidebar with navigation options and a main content area with a table of documents.

Shared Resources Screenshot:

- Header: EVOLVENXT, Shared Resources (highlighted), notification icon, user profile icon.
- Search: Search Resource Category (Select All), Must Acknowledge (Select All), Search: [input field]
- Table:

	Description	Type
DOWNLOAD VIEW PDF	2026 Broker Certification Guide	Resource Guides
DOWNLOAD VIEW PDF	2026 Agent Comp Addendum	Comp Addendum
DOWNLOAD VIEW PDF	2026 Zing Health Broker Commission Pay Schedule	Comp Addendum

My Documents Screenshot:

- Header: EVOLVENXT, My Documents (highlighted), notification icon, user profile icon.
- Search: Search Document Category (SELECT ALL), Search: [input field]
- Table:

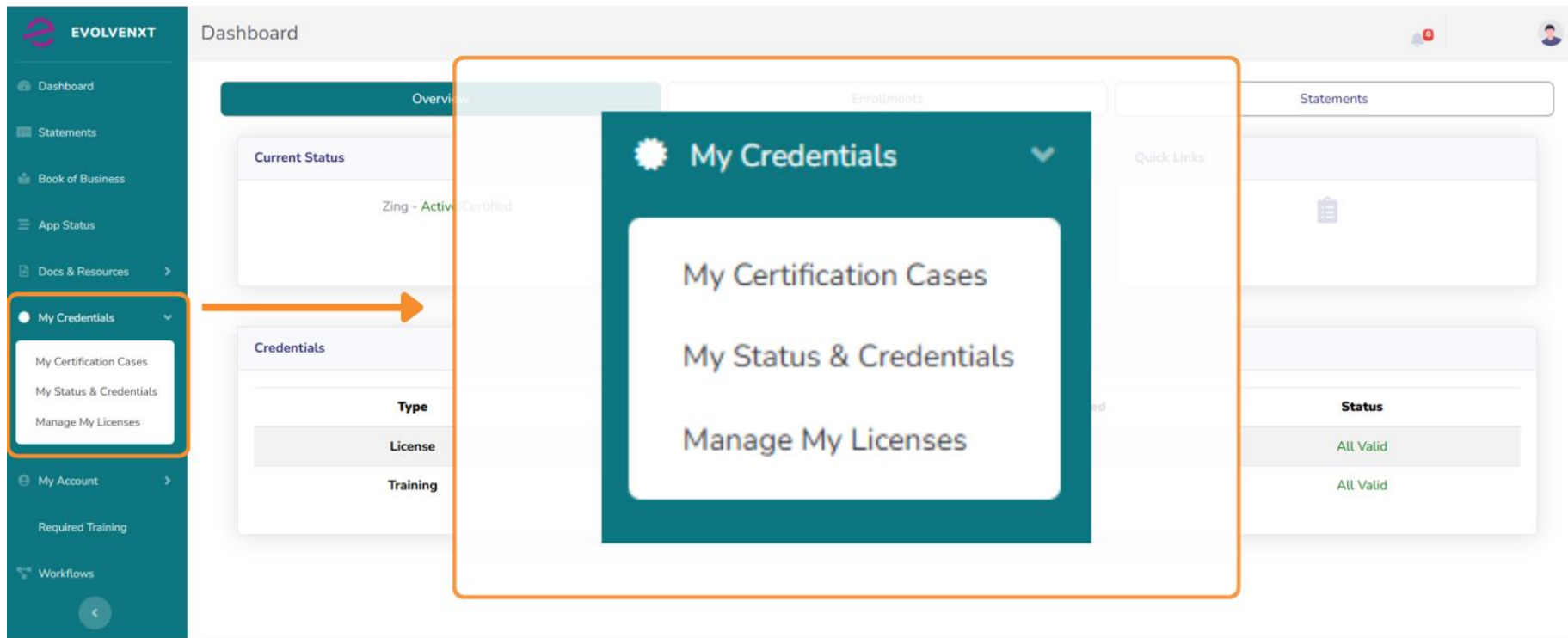
	Description	Doc Type
DOWNLOAD VIEW PDF	Signed MA Contract	Contract
DOWNLOAD VIEW PDF	Signed MA Contract	Contract
DOWNLOAD VIEW PDF	W9 - Signed	W9
DOWNLOAD VIEW PDF	Direct Release	others -test

Showing 1 to 4 of 4 entries

Broker Portal: My Credentials

Under **My Credentials**, you have three different sections: My Certification Cases, My Status & Credentials, Manage My Licenses.

Each section houses very important information you will need access to during your partnership with the health plan.



Broker Portal: My Credentials - Certification Cases

The **Certification Cases** page allows agents to review current and historical certification cases, including the status of each assigned case.

Completion of the annual certification or recertification case is required as part of the ready-to-sell process.

EVOLVENXT My Certification Cases

Search by Names:

LoB	Type	Status	Email	NPN	Broker Type	Broker Sub Type	Sales Level	Name	Upline Name	Creation Date	Email Send Date	Year	Submitted By
START Medicare Advantage	Recertify	Created - New			Field Broker	Downline Only	Agent - 01			06/23/2026	06/23/2026	2027	
Medicare Advantage	Recertify	Approved			Field Broker	Downline Only	Agent - 01			06/26/2025	06/26/2025	2026	
Medicare Advantage	Recertify	Approved			Field Broker	Downline Only	Agent - 01			06/25/2024	06/25/2024	2025	
Medicare Advantage	Initial	Approved			Field Broker	Downline Only	Agent - 01			06/27/2023	06/27/2023	2024	

Showing 1 to 4 of 4 entries

First Previous 1 Next Last

Broker Portal: My Credentials - My Status & Credentials

The **My Status & Credentials** page is divided into several sections that help agents review their current status with Zing Health. This includes certification status, sales states and licenses, training history, contract information, and state appointment details.

The screenshot shows the 'My Status & Credentials' page in the EVOLVENXT portal. The page is divided into five main sections, each with a title and descriptive text:

- My Status Info:** Under **My Status Info**, view your current status with Zing Health.
 - **Active/Certified**
 - **Suspended - Pending Training**
 - **Suspended - Pending License**
 - **Suspended - Pending Principal (agencies only)**
- Sales States & Licenses:** Under **Sales States & Licenses**, you will find a table that lists the Line of Business and states where you have declared sales intent, as well as your license status in each of those states.
- Training Info:** Under **Training Info**, you can easily view all trainings on file for you, including your AHIP.
 - 💡 If you are **Suspended-Pending Training**, looking here can help identify which training is missing. Both **Zing Training** and **Medicare Certificate** must be received each plan year.
- Contract Info:** Under **Contract Info**, view all plan years you've contacted with Zing Health.
- Appointment Info:** Under **Appointment Info**, view all declared states and your appointment status in each.

Broker Portal: My Credentials - Manage My Licenses

The **Manage My Licenses** page is used to update declared selling states. To support appointment cost management, agents should only declare states where they are licensed or have an active business need.

EVOLVENXT Manage My Licenses

The table below indicates all states where ZING sells products for each line of business. Please choose and declare your sales intent per line of business from the available state options.

Active : Our records show that you own a valid health license in this state.
Inactive : Our records show that you own a health license but it is not currently active.
No License Found: Our records show that you do not own any health license in this state.

If you do not currently own a license in a state where you intend to sell for ZING, you may still declare sales intent. However, you will need to acquire a license from that state's department of insurance before reaching ready to sell status in that state.

Zing Declared States

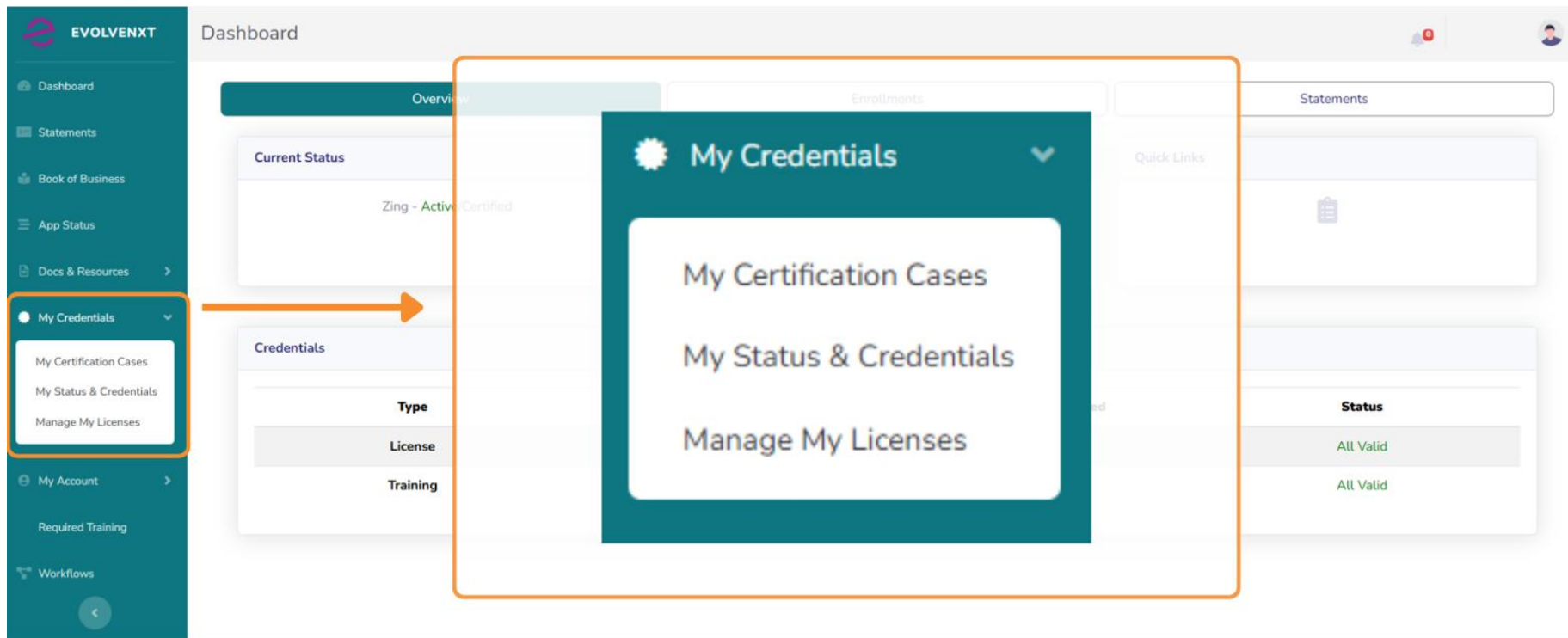
<input checked="" type="checkbox"/> IL - Illinois - Active License	<input type="checkbox"/> MS - Mississippi - No License Found
<input checked="" type="checkbox"/> IN - Indiana - Inactive License	<input type="checkbox"/> OH - Ohio - Active License
<input checked="" type="checkbox"/> MI - Michigan - Active License	<input checked="" type="checkbox"/> TN - Tennessee - No License Found

ADD SELECTED STATES

Broker Portal: My Account

Under **My Account**, you have three different sections: Account Info, Payee Info, and My Hierarchy Info.

Each section houses very important information you will need access to during your partnership with the health plan.



Broker Portal: My Account - Account Info

The **Account Info** page allows agents to update their contact information, including phone numbers, email address, and business, home, or shipping addresses. Agents should ensure their email and mobile phone number are accurate and regularly monitored, as Zing Health may use this information for important health plan communications, technology updates, and marketing-related messages.

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 ZING. Updating this email will not affect your portal login credentials.

Address Information

Address Type

Address

City State Zip

Broker Portal: My Account – Payee Info

The **Payee Info** page displays the name, address, tax, and banking information Zing Health has on file for payment and 1099 reporting. Agents can use Edit Payee Info to update their name or address, but any changes will require completion of a new W-9 before the updates can be saved.

For Dual Assignment or Licensed Only agents, adding payee information in the portal will not update the current payment setup. These agents should work directly with their upline if banking or payment changes are needed.

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

Broker Portal: My Account – My Hierarchy Info

The **My Hierarchy Info** page allows agents to view their current and historical upline relationships with the health plan. This page also displays the agent's Sub Type and Rep Type, which help identify how the agent is aligned for payment and their primary selling model.

Agents should review this information annually and contact their upline or the health plan if anything appears incorrect.

My Hierarchy Info

Rep	NPN	Start Date	End Date	Sales Level	Upline Name	Assigned Comp Name	Sub Type	Rep Type
CHANGE		10/01/2025		01 - Agent			Downline Only	Field Broker
		02/15/2022	09/30/2025	01 - Agent			Downline Only	Field Broker

Sub Type Description
Your Sub Type dictates how you are paid. This should be confirmed annually with your upline.

- **Downline Only** - Broker has an upline, broker receives their own commissions.
- **Licensed Only Agent** - Broker has an upline, commissions are assigned to this upline. Broker does not own the book of business.
- **Dual Assignment** - Broker has an upline, commissions are assigned to this upline.
- **Principal - Selling** - Selling Principal of an Agency

Rep Type Description
Your Rep Type should align with your primary selling mode.

- **Agency** - contracted at a higher level to support a downline structure.
- **Field Broker** - Primarily selling locally at in person appointments
- **Telesales Broker** - Primarily selling over the phone as part of a call center structure

View may vary based on your representative type.

Broker Portal: My Account – My Hierarchy Info | Change Request

If an agent needs to request a change to their upline affiliation or their Sub Type, they can begin the process from the **My Hierarchy Info** page by selecting **Change**. All change requests are subject to Zing Health’s release and intent-to-change policies, and additional documentation or approval may be required before the request can be finalized.

The screenshot shows the 'My Hierarchy Info' page in the EVOLVENXT portal. The page features a teal sidebar with navigation options: Dashboard, Statements, Book of Business, App Status, Docs & Resources, My Credentials, My Account (expanded to show Account Info, Payee Info, and My Hierarchy Info), Required Training, and Workflows. The main content area displays a table with the following data:

Rep	NPN	Start Date	End Date	Sales Level	Upline Name	Assigned Comp Name	Sub Type	Rep Type
CHANGE		10/01/2025		01 - Agent			Downline Only	Field Broker
		02/15/2022	09/30/2025	01 - Agent			Downline Only	Field Broker

View may vary based on your representative type.

Broker Portal: My Account – My Hierarchy Info | Change Request, Cont.

After selecting **Change** from the **My Hierarchy Info** page, a pop-up will appear where agents must choose one of two options: **Request Hierarchy Change** or **Request Payment Change with My Current Upline**. Agents should select the option that best reflects the type of change they are requesting.

Hierarchy Change should be used when requesting a change to upline affiliation.

Payment Change should be used when the agent's upline remains the same, but the payment arrangement needs to be updated.

The screenshot shows the EVOLVENXT interface. On the left is a teal sidebar with navigation items: Dashboard, Statements, Book of Business, App Status, Docs & Resources, My Credentials, My Account (expanded to show Account Info, Payee Info, and My Hierarchy Info), Required Training, and Workflows. The main content area is titled 'My Hierarchy Info' and contains a 'CHANGE' button. A pop-up window titled 'Producer Type and Hierarchy Management' is open, displaying a table with the following data:

Rep NPN	Rep Name	Rep Type	Current Sub Type
		Field Broker	Downline Only

Current Next Upline Broker/Agency	Current Commission Assign	Start Date	End Date
		10/01/2025	

Below the tables, the pop-up window shows 'Hierarchy Change Options' with a dropdown menu. The selected option is 'Request Hierarchy Change', with 'Request Payment change with my current Upline' also visible as an option.

Broker Portal: My Account – My Hierarchy Info | Hierarchy Change

To request a **Hierarchy Change**, agents must select the **Sub Type** they would like under the new upline, then search for the new upline by **Agency Name** or **Agency NPN**. Agents should also include any applicable comments, such as whether they have a release on file or are requesting to move without a release. Select **Update** once you are ready to submit the request.

My Hierarchy Info

CHANGE

Rep NPN	Rep Name	Rep Type	Current Sub Type
		Field Broker	Downline Only

Current Next Upline Broker/Agency	Current Commission Assign	Start Date	End Date
		10/01/2025	

Producer Type and Hierarchy Management

Hierarchy Change Options: Request Hierarchy Change

New Sub Type Options: Nothing selected

Next Upline: SEARCH

Add a comment to this workflow request:

UPDATE

Sub Type Description

- Downline Only - Broker has an upline, broker receives their own commissions.
- Licensed Only Agent - Broker has an upline, commissions are assigned to this upline. Broker does not own the book of business.
- Dual Assignment - Broker has an upline, commissions are assigned to this upline.
- Principal - Selling - Selling Principal of an Agency

View may vary based on your representative type.

Broker Portal: My Account – My Hierarchy Info | Payment Change

To update a current **Sub Type** without changing upline affiliation, agents should select **Request Payment Change with My Current Upline**. From there, agents can choose the desired **Sub Type**, add any supporting comments for Zing Health to review, and select **Update** to submit the request.

The screenshot shows the 'My Hierarchy Info' page in the EVOLVENXT portal. A 'CHANGE' modal is open, titled 'Producer Type and Hierarchy Management'. The modal contains two tables, a dropdown menu for 'Hierarchy Change Options', a dropdown for 'New Sub Type Options', a text input for 'Add a comment to this workflow request', and an 'UPDATE' button. A 'Sub Type Description' box is also visible, listing options like 'Downline Only', 'Licensed Only Agent', 'Dual Assignment', and 'Principal - Selling'.

Rep NPN	Rep Name	Rep Type	Current Sub Type
		Field Broker	Downline Only

Current Next Upline Broker/Agency	Current Commission Assign	Start Date	End Date
		10/01/2025	

Producer Type and Hierarchy Management

Hierarchy Change Options: Request Payment change with my current Upline

New Sub Type Options: Nothing selected

--
Licensed Only Agent
Dual Assignment

Add a comment to this workflow request: _____

Sub Type Description

- Downline Only - Broker has an upline, broker receives their own commissions.
- Licensed Only Agent - Broker has an upline, commissions are assigned to this upline. Broker does not own the book of business.
- Dual Assignment - Broker has an upline, commissions are assigned to this upline.
- Principal - Selling - Selling Principal of an Agency

UPDATE

View may vary based on your representative type.

Broker Portal: Required Training

Agents can view open assigned trainings and completed training history under **the Required Training** section. In addition to annual product certification, Zing Health may assign additional required trainings for compliance-related concerns or for agency partners required to complete annual attestations.

If an agent has an open assigned training, a red notification will appear in the left-hand navigation menu to indicate action is required.

The screenshot displays the 'Required Training' section of the EVOLVENXT portal. On the left is a teal navigation sidebar with the following items: Dashboard, Statements, Book of Business, App Status, My Documents, My Credentials, My Account, Required Training (highlighted with an orange box and a red notification icon), and Workflows. The main content area is titled 'Required Training' and features a user profile icon in the top right. Under the 'Open Assigned Trainings' heading, there is a dropdown menu showing '2027 Zing Training' with a red 'Not Started' status tag. Below this, a card for '2027 Zing Training' contains two components: 'Zing Health 2026-2027 Product Certification' with a green 'START' button, and 'Zing Health 2026-2027 Product Exam' with a grey 'LOCKED' button and a note: 'You must first complete the above training component(s) to unlock this component.' The 'History' section below shows a dropdown menu with '2026 Zing Training' and a green 'Completed' status tag.

Broker Portal: Workflows

The **Workflows** page allows agents to view and track requests or tasks assigned during their partnership with the health plan. Workflows are commonly used for hierarchy change requests, payment change requests, or other items that may require review, approval, or follow-up.

Agency partners and agents should monitor this section and complete any assigned workflows in a timely manner to avoid delays in processing.

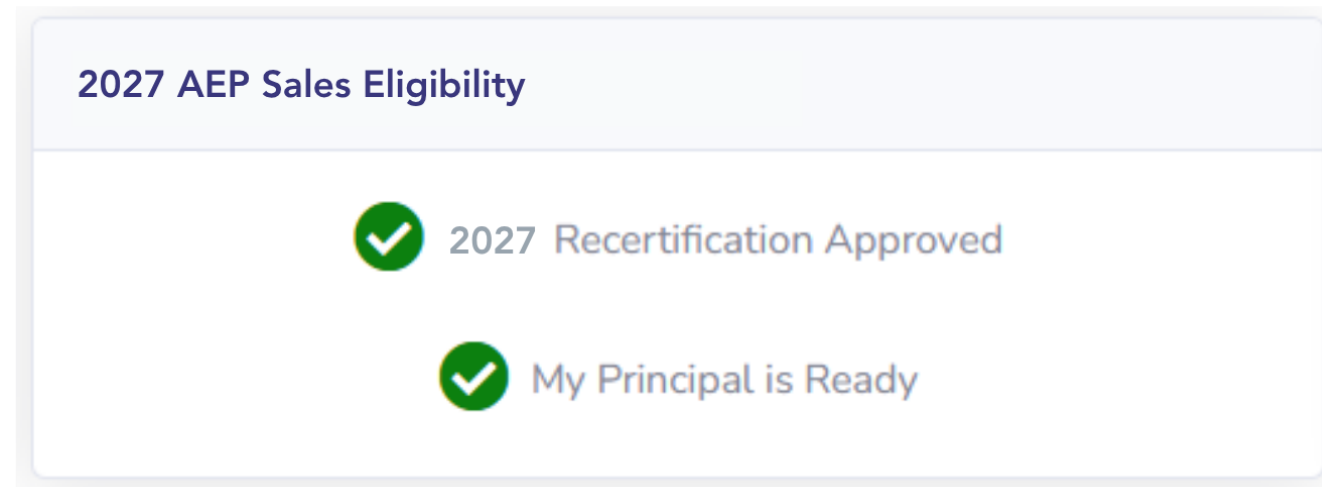
The screenshot shows the EVOLVENXT Workflows page. On the left is a teal sidebar with the following menu items: Dashboard, Statements, Book of Business, App Status, Docs & Resources, My Credentials, My Account, Required Training, and Workflows. The main content area has a header 'Workflows' with a notification icon and a user profile icon. Below the header are two dropdown menus for 'Status' and 'Type', both currently set to '--'. There are 'SEARCH' and 'DOWNLOAD' buttons. Below these is a 'Show 10 entries' control and a search box. A table with columns 'Type', 'Status', 'Requestor', 'Approver', 'Execution Date', and 'Last Updated' is shown, but it contains no data, displaying 'No data available in table' and 'Showing 0 to 0 of 0 entries'. There are 'Previous' and 'Next' navigation buttons at the bottom right of the table area.

Broker Portal: Agency - RTS Status

For an agency to reflect Ready-to-Sell, the agency must complete its assigned certification case, and the Principal must complete all required individual steps. Delays may impact the RTS status of downline agents and may prevent payment of override commissions.

Please note: no exam is required for the agency certification case. This step only requires completion of an updated, signed agreement.

Once all requirements are complete, the agency dashboard will reflect the agency's RTS status after an overnight refresh.



2027 AEP Sales Eligibility

- ✓ 2027 Recertification Approved
- ✓ My Principal is Ready



Broker Portal: Agency - Dashboard

Agencies have access to an additional Agency dashboard section where they can view Top Brokers, Downline Credentials, and AEP Downline Statuses.

This view helps agencies quickly monitor downline readiness and identify brokers who may still need to complete certification requirements.

EVOLVENXT Dashboard

Overview Enrollments Statements **Agency**

Top Brokers

NPN	Name	Active Members
		152
		118
		101

Downline Credentials

Downline Status	2830 Active/Certified 840 Suspended
Downline Licenses	14330 Active 1208 Inactive

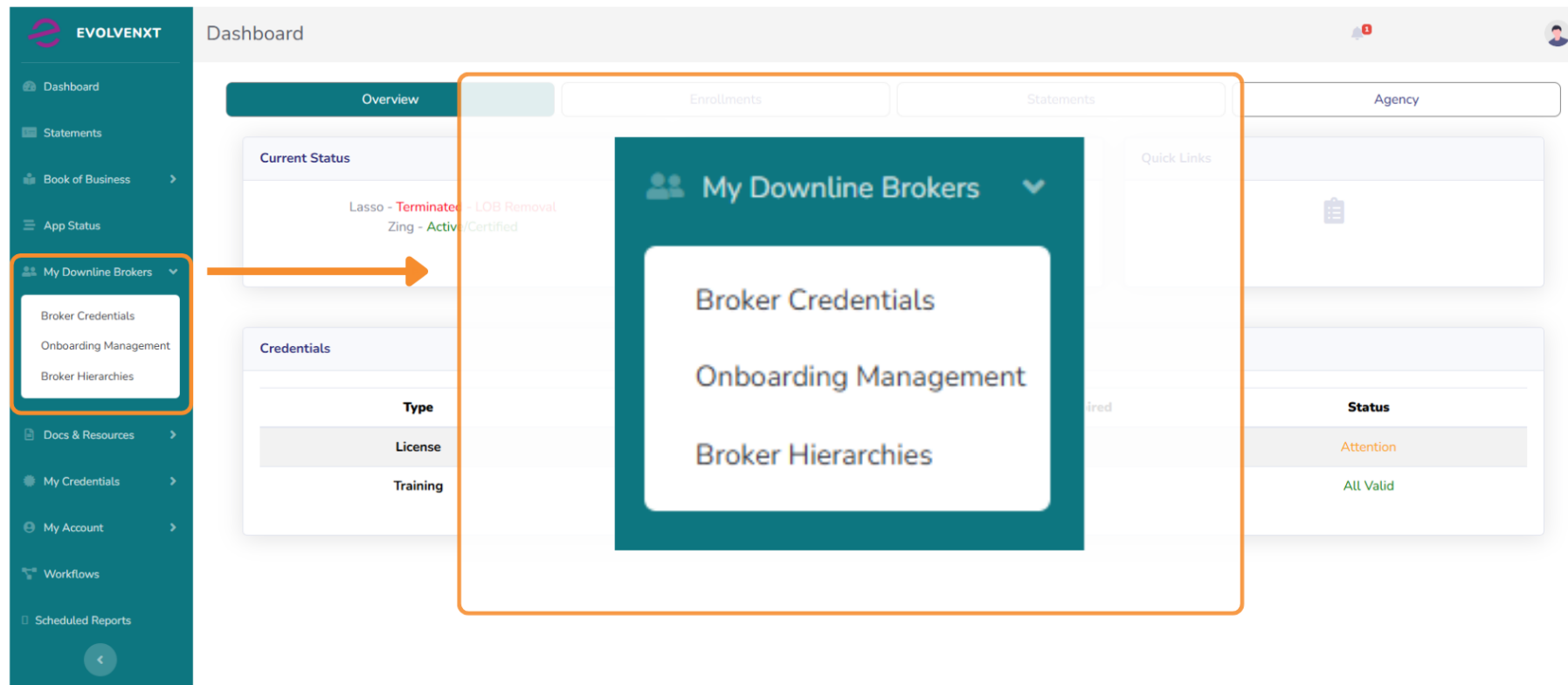
2027 AEP Downline Status

2027 AEP Ready Brokers	3307
2027 AEP Incomplete Brokers	366

Broker Portal: Agency - My Downline Brokers

Under **My Downline Brokers**, agencies can access three sections: Broker Credentials, Onboarding Management, and Broker Hierarchies.

Each section allows you to view and manage downline hierarchy information as needed.



View may vary based on your representative type.

Broker Portal: Agency - My Downline Brokers | Broker Credentials

The **Broker Credentials** page allows you to download credential-related reports on demand.

Available reports include: Rep Status, License Info, Training Info, Contract Info, and Appointment Info.

The screenshot displays the EVOLVENXT Broker Credentials interface. On the left is a teal sidebar with navigation options: Dashboard, Statements, Book of Business, App Status, My Downline Brokers (with a dropdown menu containing Broker Credentials, Onboarding Management, and Broker Hierarchies), Docs & Resources, My Credentials, My Account, Workflows, and Scheduled Reports. The main content area has a header with the 'Broker Credentials' title and a user profile icon. Below the header are two search input fields labeled 'Rep NPN' and 'Rep Name', followed by a 'SEARCH' button. Five report download cards are displayed, each with a title and a list of included report fields:

- DOWNLOAD REP STATUS**
 - Report fields included:
 - Agent Name
 - Broker Type
 - Sub Type
 - NPN
 - Broker Status
 - Status Reason
 - LOB
 - State
 - State Status
 - AEP Status
- DOWNLOAD LICENSE INFO**
 - Report fields included:
 - Agent Name
 - Broker Type
 - Sub Type
 - NPN
 - State
 - Status
 - Residency
 - License #
 - Class Name
 - Effective Date
 - Expiration Date
- DOWNLOAD TRAINING INFO**
 - Report fields included:
 - Agent Name
 - Broker Type
 - Sub Type
 - NPN
 - Year
 - Training Name
 - Training Score
 - Start Date
 - End Date
- DOWNLOAD CONTRACT INFO**
 - Report fields included:
 - Agent Name
 - Broker Type
 - Sub Type
 - NPN
 - Year
 - Start Date
 - End Date
 - Contract Status
- DOWNLOAD APPOINTMENT INFO**
 - Report fields included:
 - Agent Name
 - Broker Type
 - Sub Type
 - NPN
 - State
 - Start Date
 - End Date
 - Rule Name
 - Cocode
 - Company
 - LOA Product
 - Appointment Method
 - Appointment Staus

View may vary based on your representative type.

Broker Portal: Agency - My Downline Brokers | Onboarding Mgmt

The **Onboarding Management** page allows agencies to create onboarding invitations for newly recruited agents.

Agencies can also view previously sent invitations, track invitation status, and cancel any open invitations as needed.

The screenshot displays the 'Onboarding Management' interface. At the top, there are buttons for 'CREATE INDIVIDUAL INVITE' and 'DOWNLOAD', and a search bar. Below these is a table of onboarding invitations. The table has the following columns: Name, Email, LOB, Year, Type, NPN, Rep Type, Sales Level, Upline Name, Submitted By, Creation Date, and Status. The data rows are as follows:

Name	Email	LOB	Year	Type	NPN	Rep Type	Sales Level	Upline Name	Submitted By	Creation Date	Status
		Medicare Advantage	2027	Initial		Field Broker	Agent			06/24/2026	Created - New
		Medicare Advantage	2026	Initial		Field Broker	Agent			06/09/2026	Approved
		Medicare Advantage	2026	Initial		Field Broker	Agent			06/08/2026	Approved
		Medicare Advantage	2026	Initial		Agency	FMO			06/05/2026	Approved
		Medicare Advantage	2026	Initial		Field Broker	Agent			06/04/2026	Approved
		Medicare Advantage	2026	Initial		Field Broker	Agent			05/29/2026	Created - New

View may vary based on your representative type.

Broker Portal: Agency - Onboarding Mgmt | Create Invite

When creating an onboarding invitation, agencies will need the agent's NPN and a unique email address. When onboarding an agency, the agency invitation must be sent first before any downline agent invitations are created.

EVOLVENXT Onboarding Management

CREATE INDIVIDUAL INVITE DOWNLOAD

Create New Onboarding Case

Onboarding Type *
INITIAL

LoB *
ZING - MA

Rep Type *

Sub Type *

Sales Level *

NPN * Email *

Immediate Upline *

CHANGE NEXT UPLINE

CREATE CASE

Rep Type Options
Rep Type should align with the agents primary selling mode.

- Agency** - contracted at a higher level to support a downline structure.
- Field Broker** - Primarily selling locally at in person appointments
- Telesales Broker** - Primarily selling over the phone as part of a call center structure

Sub Type Description

- Downline Only** - Broker has an upline, broker receives their own commissions.
- Licensed Only Agent** - Broker has an upline, commissions are assigned to this upline. Broker does not own the book of business.
- Dual Assignment** - Broker has an upline, commissions are assigned to this upline. Broker owns the book of business.
- Principal - Selling** - Principal of an Agency

Principal Invitations

When sending a Principal invitation:

- Always select **Principal - Selling**, regardless if they sell or not.
- Must provide a different email than used for the agency.

Status	Created	Approved
Approved	06/08/2026	Approved
Approved	06/05/2026	Approved
Approved	06/04/2026	Approved

CANCEL

View may vary based on your representative type.

Broker Portal: Agency - My Downline Brokers | Broker Hierarchies

The **Broker Hierarchies** page allows agencies to search, review, and download their downline hierarchy structure..

EVOLVENXT Broker Hierarchies

Rep Name Rep NPN SubType

Sales Level Next Name Next NPN

Show entries

[SEARCH](#) [DOWNLOAD](#)

Search:

Rep Name	NPN	Start Date	End Date	Sales Level	Next Upline	Assigned Comp Name	Sub Type	Rep Type
		10/09/2020		01 - Agent			Downline Only	Field Broker
		10/12/2020		01 - Agent			Downline Only	Field Broker
		06/02/2021		01 - Agent			Licensed Only Agent	Field Broker
		09/26/2021		01 - Agent			Downline Only	Field Broker
		07/02/2021		01 - Agent			Licensed Only Agent	Field Broker
		07/01/2021		01 - Agent			Licensed Only Agent	Field Broker
		07/07/2021		01 - Agent			Downline Only	Field Broker
		10/12/2021		01 - Agent			Licensed Only Agent	Telesales Broker
		01/02/2023		01 - Agent			Licensed Only Agent	Field Broker
		10/18/2021		01 - Agent			Licensed Only Agent	Field Broker

Showing 1 to 10 of 3,671 entries

First Previous **1** 2 3 4 5 ... 368 Next Last

View may vary based on your representative type.

Broker Portal: Agency - My Credentials | Downline Credentials

The **Downline Credentials** page allows agencies to quickly review a downline broker's status, licensing, training, contracts, and appointments.

For example, when an agent is showing Suspended - Pending Training, agencies can search for the agent, select View Details, and review the information directly in the Broker Portal. This helps agencies resolve basic credential questions without relying on separate reports.

The screenshot displays the EVOLVENXT interface. On the left is a teal sidebar with navigation options: Dashboard, Statements, Book of Business, App Status, My Downline Brokers, Docs & Resources, My Credentials (selected), My Certification Cases, Downline Credentials, My Status & Credentials, Manage My Licenses, My Account, Workflows, and Scheduled Reports. The main content area is titled 'Downline Credentials' and features a search bar with 'Rep NPN' and 'Rep Name' fields and a 'SEARCH' button. Below the search bar is a table with columns: Rep Name, Rep NPN, Rep Status, and License Status. The table contains five rows, each with a 'View Details' link. The fourth row is highlighted, showing a status of 'Suspended - Pending Training' and '1 Active | 0 Expired' licenses. An orange box highlights the 'View Details' link for this row, with an arrow pointing to a detailed modal window. The modal window is titled 'REP NAME' and has tabs for 'My Status Info' (selected), 'Sales States & Licenses', 'Training Info', 'Contract Info', and 'Appointment Info'. Below the tabs is a table with columns: LOB, Active Contract, Active Training, and Rep Status. The table shows one entry for 'MA' with 'Active Contract' set to 'Yes', 'Active Training' set to 'No', and 'Rep Status' set to 'Suspended - Pending Training'. The modal also includes pagination controls at the bottom: 'Showing 1 to 1 of 1 entries' and buttons for 'First', 'Previous', '1', 'Next', and 'Last'. A home icon is visible in the top right corner of the page.

View may vary based on your representative type.

Broker Portal: Agency - Scheduled Reports

Agencies have access to a number of automated reports which can be sent via email directly from the system. The **Scheduled Reports** tab allows you to create new reports and view reports actively being sent.

EVOLVENXT Scheduled Reports

In this menu item, you can subscribe to the automated report delivery service. The delivery methods are either email or SFTP and the frequency can be configured as daily, weekly, or monthly. To initiate this service, click the **Create** button and complete the configuration options. To edit or deactivate an existing report automation, click the **View** button of that record.

CREATE

Search:

	Name	Active	Type	Frequency	First Delivery
VIEW	Master Rep Status Report	Yes	Email	Daily	2023-09-22
VIEW	Master Rep Status Report with Sub ToH	Yes	Email	Daily	2026-06-18

Showing 1 to 2 of 2 entries

Previous **1** Next

Broker Portal: Scheduled Reports (Agencies Only)

Choose from Rep License Report, Onboarding Report, Rep Status All Hierarchies Report, and Master Rep Status Team Level Report. Production and Application Status reports are currently in a testing phase.

The Master Rep Status Team Level Report provides the greatest detail and is the recommended report.

Report Details

Report Template

File Name*

First Delivery*

Rep License Report

Onboarding Report

Rep Status All Hierarchies Report

Master Rep Status Team Level Report

Delimiter

Data Wrapper

Export Time Format

File Export Delimiter

Email Recipients

Insert in a comma separated list if sending multiple.

To:

Cc:

Bcc:

SAVE



Questions? We're here to help!

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[Find your local contact](#)

