

Certification Onboarding and Quick Start Guide

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I. Introduction

Our mission is to build a health care solution that would be good enough for our own family and loved ones. We are devoted to the health and wellness of our members by helping them navigate the healthcare system with service guides, utilizing world-class technology to enable a simplified experience, and partnering with top providers for better health outcomes. Learn more about the [Devoted Health Difference](#).

Important Things to Know

- You must hold an active health insurance license, be contracted, get certified, and be appointed before you can market Devoted benefits.
- If you have completed the Core Medicare training, we accept AHIP, Pinpoint or NABIP (formerly NAHU) certificates. If not, you can now complete the AHIP training by using the [link](#) in our onboarding workflow and get a \$50 discount at checkout.
- The Devoted Health Agent Certification & Exam informs you on how to compliantly market Devoted Health benefits and satisfy the annual CMS Medicare Compliance Program requirements.
- To receive renewals for business sold in prior years, you must be licensed and appointed to sell Medicare products per state laws and recertified annually.
- Completing the PY2026 Certification will also allow you to market PY2025 benefits in our current service areas.
- A face-to-face certification is not required.

Our PY2026 Onboarding & Certification available in our Agent Portal. Our goal is to keep our onboarding experience easy and allow agents to complete the process in a few simple steps.

Onboarding and certification steps:

- Account creation for our Agent Portal
- W-9 & Direct Deposit (*Direct Payees only*)
- Preferred Markets (selections here will determine your state appointment(s))
- Selling Needs
- Code of Conduct
- Agent Agreement
- Background Check

- Medicare Core Training or equivalency upload (AHIP, Pinpoint or NABIP (formerly NAHU))
 - CMS Fraud, Waste & Abuse & Compliance Training
- Devoted PY2026 Certification Training & Assessment
 - Agents have 3 attempts to pass the training exam with a minimum score of 85% *(If unable to pass within 3 attempts, agent will need to recertify for PY2026)*
 - Each time the exam is opened (initiated) it will count as an attempt, therefore, it must be completed in one sitting (~40 min).
- License Check
- Appointment

If these steps can't be completed all at once, your progress will be saved and you can continue from the dashboard at a later time.

Agents cannot market or sell Devoted Health benefits until they receive the “ready to sell”(RTS) email.

**PY2025 certification is only available for existing Devoted Health service areas.*

II. Getting Started

Account Creation

- Click on the link sent to you by your agency and start the account creation process. If you have any questions on how to obtain the link, please contact your agency directly.

Grow your business with Devoted Health Medicare Advantage plans

Good news: Devoted is growing again this year! Get certified to sell Devoted Health Medicare Advantage plans and enjoy seamless support every step of the way.

Register today



- To ensure you are affiliated with your agency correctly, you will need to confirm the agency and affiliation payee type as seen in the image below. *Please note, all affiliations will need to follow the release and transfer policy outlined in our broker manual.*

The screenshot shows a two-column interface. The left column, titled 'Welcome to our Agent Portal', lists four benefits: 'Register to sell Devoted Health', 'Submit applications online', 'Track your clients' status', and 'See your commissions'. Below these is a box labeled 'SALES AGENCY' containing 'One Person Agency (Parent)' and 'Indirect Payee'. The right column, titled 'Register to sell Devoted Health plans', states 'Our process is quick. You just need to create an account and complete a few steps.' It then says 'FIRST, CONFIRM YOUR AFFILIATION' and 'If the wrong information is listed, contact your agency administrator.' A red-bordered box contains the text 'Indirect Payee for One Person Agency (Parent)'. Below this is a checkbox with a checkmark and the text 'I acknowledge that the information is correct and that I have read and reviewed [Devoted Health's Release and Transfer Policy](#)'. At the bottom of the right column is a red 'Next' button.

- You will be prompted to enter your **Name, NPN, date of birth, email address, and zip code.**
 - This will create an account if you do not already have an Agent Portal account setup.
- If your information is already linked to an account, then you will be prompted to [log in](#) to your account using your credentials, or contact Agent Support for assistance at 1-877-764-9446.

The screenshot shows a form titled 'Tell us who you are'. It contains several input fields: 'Agency:' with a dropdown menu showing 'Four People Agency (Sub) - Direct Payee'; 'First Name:'; 'Last Name:'; 'National Producer Number:'. Below these is a link: 'Don't know your NPN? You can look it up at [NIPR](#)'. Then 'Birth Date:' with a date picker showing 'YYYY-MM-DD'; 'Email:'; and 'Zip:' with a placeholder 'XXXXX'. At the bottom is a red 'Submit' button.

Thanks! Check your email

You should get a welcome email that will prompt you to finish setting up your account. Don't see one? Call [1-877-764-9446](tel:1-877-764-9446)

Account Setup

- When your account is created, you will receive an email to verify your email address and set a password for your Agent Portal account. Please click the **Create Password** button as seen below:



Welcome to the Devoted Health Agent Portal — where you can sell Devoted easier and faster by submitting applications online, track your clients' status, and see your commissions.

How to Log In

We've already provided you with a username — you'll just need to create a password to access your account.

Username: [REDACTED]

[Create Password](#)

Use this [Quick Start Guide](#) to help you get started.

Need help?

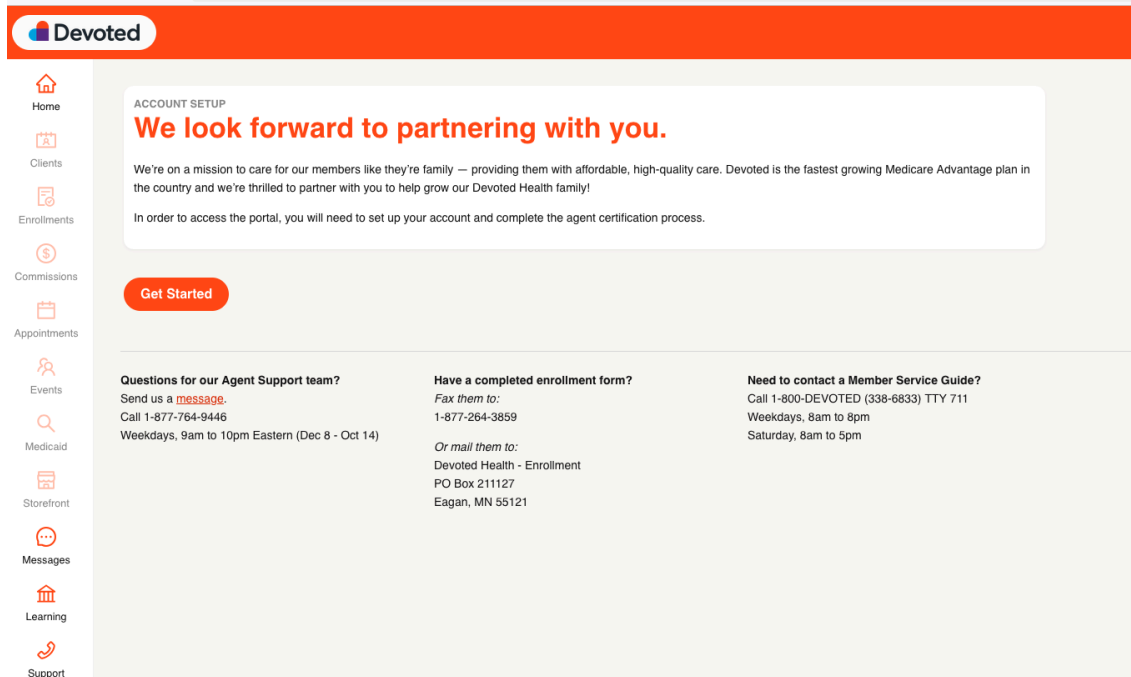
agent-support@devoted.com

☎ [1-877-764-9446](tel:1-877-764-9446)

Weekdays, 9am to 10pm Eastern (Dec 8 - Oct 14)

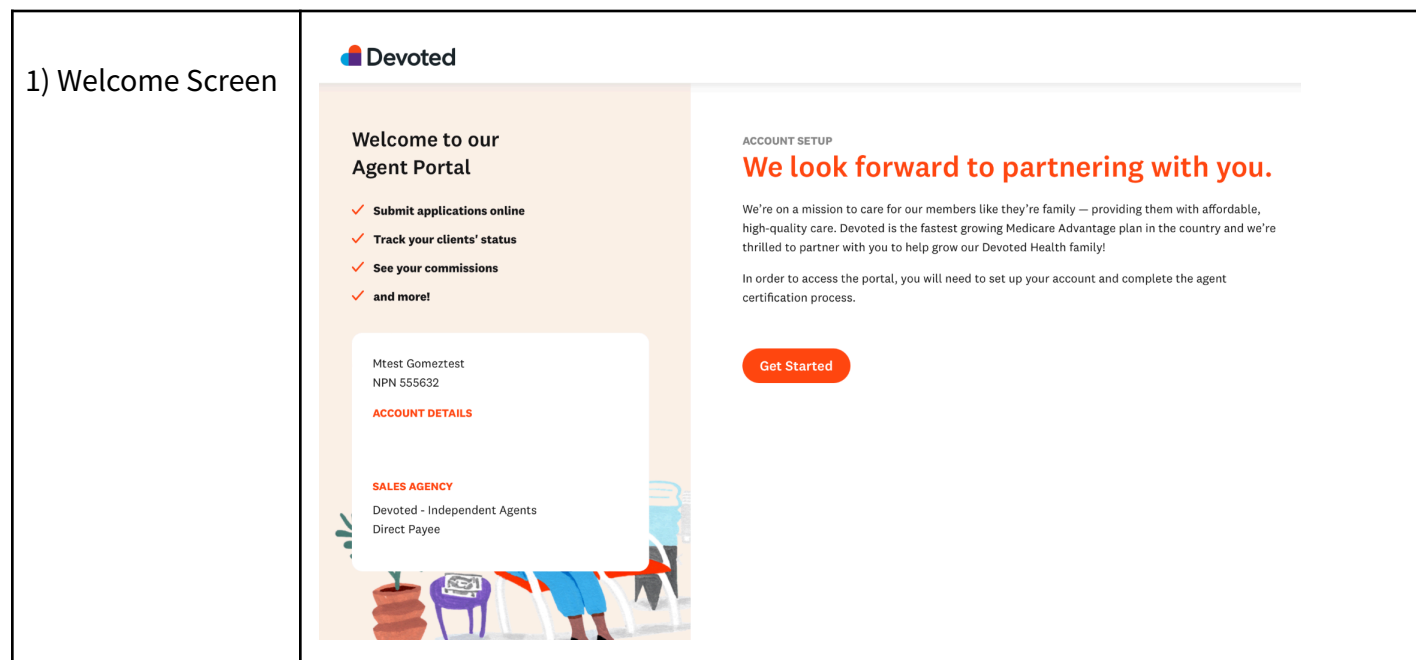
Devoted Health is an HMO and PPO plan with a Medicare contract. Our D-SNPs also have contracts with State Medicaid programs. Enrollment in our plans depends on contract renewal. Our service areas are the following counties in Florida: Broward, Hillsborough, Miami-Dade, Okaloosa, Palm Beach, Pinellas, Polk and Seminole Counties and the following counties in Texas: Montgomery, Waller, Harris and Fort Bend. Devoted Health complies with applicable Federal civil rights laws and does not discriminate on the basis of race, color, national origin, age, disability, or sex. ATENCIÓN: Si habla español, tiene a su disposición servicios gratuitos de asistencia lingüística. Llame al 1-800-338-6833 (TTY 711).

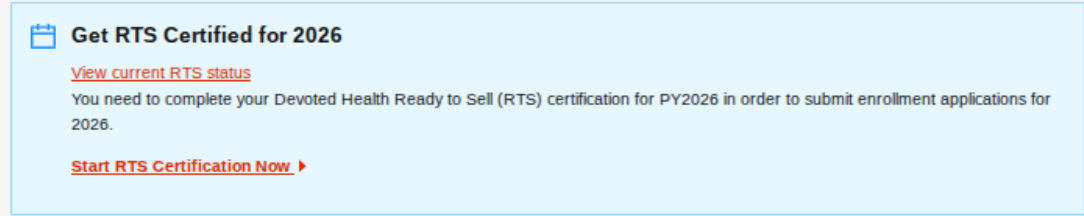
- You will be prompted to set your password. Once this is complete, you can log in to your Agent Portal account.



Start the process

You will be able to start our onboarding process by following the easy steps outlined in the images below:



1b) Existing Agent Portal Users	<ul style="list-style-type: none"> ● If you are an existing agent, you will log into your Agent Portal account and click on the banner to start your onboarding and certification process ● This will open up a new window as seen below and you should be able to start the process starting on step 3 <div data-bbox="500 407 1578 621">  <p>Get RTS Certified for 2026</p> <p>View current RTS status</p> <p>You need to complete your Devoted Health Ready to Sell (RTS) certification for PY2026 in order to submit enrollment applications for 2026.</p> <p>Start RTS Certification Now ▶</p> </div>
2) Contact Info & Preferred Language	<ul style="list-style-type: none"> ● Enter the full mailing address and mobile phone number. ● We recommend that you opt in to SMS by checking the box. This will allow you to receive text notifications for enrollment applications, trainings, events, etc. (You can opt out at any time) ● Next, select your language preference. ● Select continue when finished.

ACCOUNT SETUP

Finish setting up your Devoted Health account

We share important information via email, SMS, and mail. Let us know how to reach you.

* Mailing Address:

Mailing Address is required.

* City:

City is required.

* State:

* Zip:

Zip code is required.

* Cell Number:

Yes, I want to get messages from Devoted Health. Message and data rates may apply.

☐ Yes ☐ No

Back

Continue

Welcome to our Agent Portal

- ✓ Register to sell Devoted Health
- ✓ Submit applications online
- ✓ Track your clients' status
- ✓ See your commissions

Travis Hutchins TEST ACCOUNT
NPN 12312312345

ACCOUNT DETAILS



SALES AGENCY

Devoted Health - Independent Agent
Direct Payee



ACCOUNT SETUP

Which languages do you speak?

<input type="checkbox"/> English	<input type="checkbox"/> Spanish
<input type="checkbox"/> Chinese	<input type="checkbox"/> Creole
<input type="checkbox"/> Korean	<input type="checkbox"/> Russian
<input type="checkbox"/> Vietnamese	<input type="checkbox"/> French
<input type="checkbox"/> German	<input type="checkbox"/> Laotian

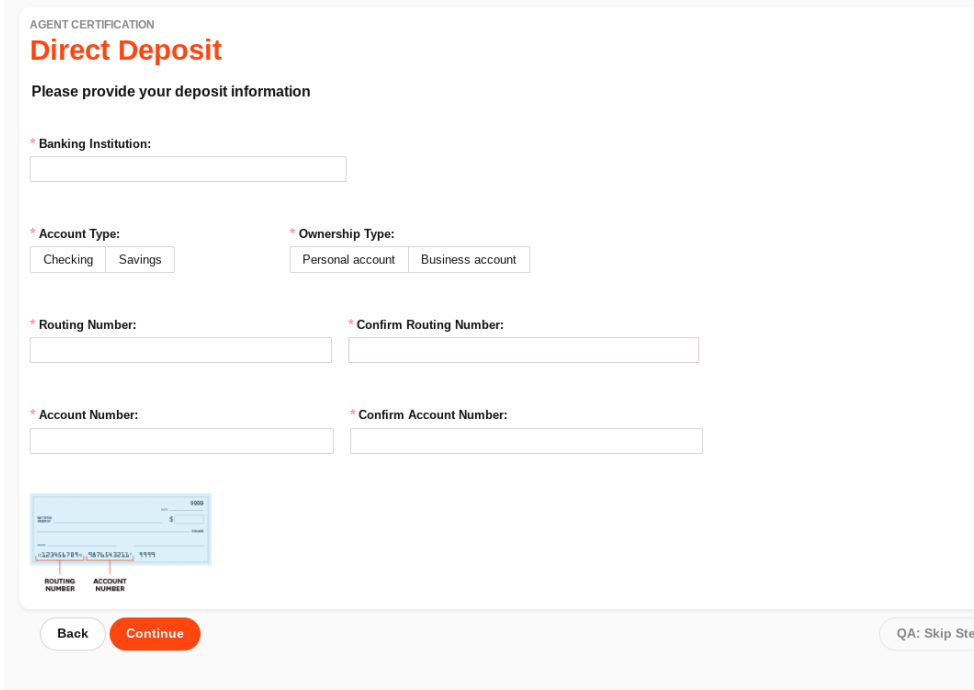
Other Languages:

Back

Continue

<p>3) Certification Overview - <i>All users</i></p>	<ul style="list-style-type: none"> ● “Overview” provides key information related to the certification process and next steps. <p>AGENT CERTIFICATION</p> <h3>Agent Certification Overview for 2026</h3> <p>How it works</p> <p>You'll need to complete our certification process to be ready to sell. The Center for Medicare & Medicaid Services (CMS), the federal agency that oversees Medicare, requires all employed or contracted agents to meet their licensing, appointment (if applicable), and certification requirements to sell or market Medicare products. You'll need to complete the following steps:</p> <ul style="list-style-type: none"> • Agent Agreement • Code of Conduct Acknowledgement • Background Check Consent • Certification Trainings <ul style="list-style-type: none"> ◦ Medicare Core Training or equivalent (AHIP, Pinpoint, or NABIP (formerly NAHU)) ◦ CMS, Fraud, Waste & Abuse Training or equivalent (AHIP, Pinpoint, or NABIP (formerly NAHU)) ◦ CMS Compliance Training or equivalent (AHIP, Pinpoint, or NABIP (formerly NAHU)) ◦ Devoted Health Product Training • Devoted Health Certification Exam <ul style="list-style-type: none"> ◦ You'll have 3 attempts to pass the exam with a minimum score of 85% ◦ Each time the exam is initiated it will count as an attempt and must be completed in one sitting (~30 mins) <p>We will save your progress if you can't finish the entire certification process all at once. We will also conduct a license check as part of the certification process.</p> <p>Once you complete the certification process and have "Ready to Sell" (RTS) status, you will receive notification both via email and in the agent portal for the appropriate plan years. You cannot market or sell Devoted Health benefits until you've received this email. If you've completed the certification process but have not received an email, please contact Devoted Health's Agent Support at 877-764-9446.</p> <p>How long does the certification process take?</p> <p>It takes approximately 4-12 business days to review and process the certification.</p> <ul style="list-style-type: none"> • Certificate Review: 1-2 business days • Background Check: 1-2 business days • Appointment: up to 7 business days (varies by state, new Devoted agents ONLY) <p>Have questions or need help?</p> <p>Call Agent Support at 877-764-9446, Weekdays, 9am to 10pm Eastern (Dec 8 - Oct 14)</p> <p>Start Certification</p>
<p>4) Taxpayer Identification and Attestation (W-9) - (<i>Direct Payee Only</i>)</p>	<ul style="list-style-type: none"> ● Enter your most up-to-date tax information. This will be used to process any required documents (e.g. 1099 forms, etc). <p>AGENT CERTIFICATION</p> <h3>Taxpayer Identification and Attestation</h3> <p>What type of Taxpayer Identification Number will you use?</p> <div> <input type="text" value="Social Security Number (SSN) or Individual Tax Identification Number (ITIN)"/> </div> <div> <input type="text" value="Social Security Number (SSN) or Individual Tax Identification Number (ITIN)"/> <input type="text" value="Employer Identification Number (EIN)"/> </div> <p>* Social Security Number / Individual Tax Payer identification Number:</p> <input type="text"/> <p>* Federal Tax Classification:</p> <input type="text" value="Select Federal Tax Classification ..."/> <p>* Individual Name (as shown on your income tax return):</p> <input type="text"/> <p>* Address:</p> <input type="text"/> <p>Where we will mail your tax documents</p> <p>* City: <input type="text"/> * State: <input type="text" value="State"/></p> <p>* Zip: <input type="text"/></p>

	<p>Certification</p> <p>Under penalty of perjury, I certify that:</p> <p><input type="checkbox"/> The number shown on this form is my correct taxpayer identification number (or I am waiting for a number to be issued to me); and</p> <p><input type="checkbox"/> I am not subject to backup withholding because: (a) I am exempt from backup withholding, or (b) I have not been notified by the Internal Revenue Service (IRS) that I am subject to backup withholding as a result of a failure to report all interest or dividends, or (c) the IRS has notified me that I am no longer subject to backup withholding; and</p> <p><input type="checkbox"/> I am a U.S. citizen or other U.S. person (defined in the instructions); and</p> <p><input type="checkbox"/> FACTA exemption codes are not being collected and do not apply therefore certification for FACTA reporting is not needed.</p> <p>Certification instructions. You must uncheck item 2 above if you have been notified by the IRS that you are currently subject to backup withholding because you have failed to report all interest and dividends on For mortgage interest paid, acquisition or abandonment of secured property, cancellation of debt, contributions to an individual retirement arrangement (IRA), and generally, payments other than interest and divk provide your correct TIN. See the instructions for Certifications (Part II), later.</p> <p>The Internal Revenue Service does not require your consent to any provision of this section other than the certifications required to avoid backup withholding.</p> <p>* Signature:</p> <div style="border: 1px solid black; height: 20px; width: 100%;"></div> <p>To sign, please type your full name exactly as follows: Vivian Hua</p> <div style="display: flex; justify-content: space-between; margin-top: 10px;"> Back Continue </div>
<p>5) Opt in to electronic 1099</p>	<ul style="list-style-type: none"> Individuals may receive their 1099 electronically instead of by paper by choosing the opt in option in this section. <div style="border: 1px solid #ccc; padding: 10px; margin-top: 10px;"> <p>AGENT CERTIFICATION</p> <h2 style="color: #e67e22;">Electronic delivery of your 1099</h2> <p>Click the button below to open the document in a new window.</p> <div style="text-align: center; margin: 10px 0;"> View Electronic 1099 Consent </div> <p>* Opt in to receive your 2025 1099 electronically?</p> <div style="display: flex; justify-content: space-around; margin: 5px 0;"> Yes No </div> <p>* Signature:</p> <div style="border: 1px solid #ccc; height: 20px; width: 100%;"></div> <p>To sign, please type your full name exactly as follows: Vivian Hua</p> </div>

<p>6) Direct Deposit - (Direct Payee only)</p>	<ul style="list-style-type: none"> ● Fill in your current direct deposit information. Note - you will be able to update this information at any time from the “My Account” option on the top right of the page. 
<p>7) Preferred Markets</p>	<ul style="list-style-type: none"> ● Select which model of sales applies to you (<i>field sales, telesales (your agency is approved by DH), or both</i>). ● Ensure to make a selection for each of the states you will like to be appointed in. If you do not select the applicable state(s) available, you will not be appointed for that state(s). You will also be prompted to select your primary selling market. The primary market counties will also be visible during your selection. <i>Please note this will not prevent you from selling/market in other markets, you can update in the future as noted in the “Update your State” License section.</i>

How and where you plan to sell in 2026

The following information helps us manage state appointments, and build better tools and trainings for our broker partners.

How do you plan to sell? *

☐ Field ☐ Telephonically ☐ Field and telephonically

In which state(s) do you plan to sell? *

☐ Alabama

☐ Arizona

☐ Arkansas

☐ Colorado

☐ Delaware

☐ Florida

☐ Georgia

☐ Hawaii

☐ Illinois

☐ Indiana

☐ Iowa

☐ Kansas

☐ Kentucky

☐ Louisiana

☐ Mississippi

☐ Missouri

☐ Nebraska

☐ New Mexico

☐ North Carolina

☐ Ohio

☐ Oklahoma

☐ Oregon

☐ Pennsylvania

☐ South Carolina

☐ Tennessee

☐ Texas

☐ Utah

☐ Virginia

☐ Washington

What is your primary market? *

Primary market:

Select Primary Market

8) Your Selling
Needs - *All users*

- Providing this information will let us know how we can better partner with you. We deeply value your feedback so please answer all of the questions to the best of your availability.

Tell us about your needs

Tell us a little bit about you

Select all that apply

- ☐ I am a veteran
- ☐ I am a Devoted member
- ☒ I have a family member who is on Devoted

How long have you worked in the Medicare Industry?

1-5 years

How did you hear about Devoted? (select up to 3) *

- ☒ FMO/Agency
- ☒ Referral by friend/colleague
- ☐ Client interested in Devoted Health
- ☐ Digital ad - Facebook
- ☐ Digital ad - Insurance Forum
- ☐ LinkedIn
- ☐ Email from Devoted
- ☐ Devoted Broker Manager/Employee
- ☐ Other

Please enter any other sources

Help us understand your selling needs and how we can best support you

What is your primary goal for certifying with Devoted Health? *

Support and service my existing Book of Business

What is the approximate size of your Medicare Advantage Book of Business currently?

1-50

What marketing demographics do you work with? (select all that apply) *

- ☒ None of the below
- ☐ Age-ins/retriring soon
- ☐ D-SNP/Low income
- ☐ Veteran
- ☐ Spanish speaking
- ☐ Business/Commercial retiree
- ☐ AEP focus only
- ☐ Other

Please enter any other marketing demographics

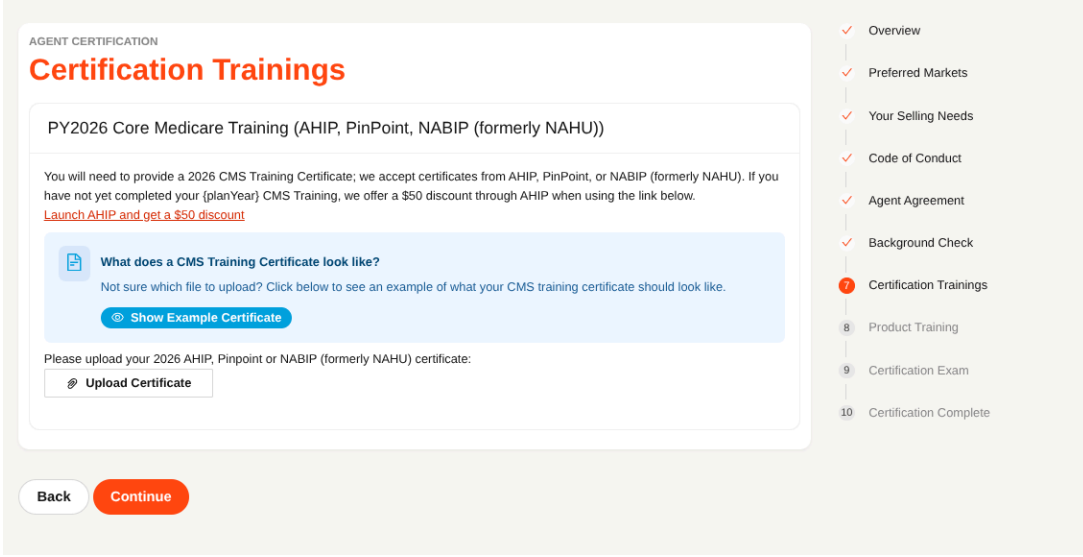
Which other lines of business do you actively sell? *

- ☒ None of the below
- ☐ Medicare Supplement
- ☐ Annuities
- ☐ Life Insurance
- ☐ Property & Casualty
- ☐ Voluntary Health (Hospital Indemnity, Dental, etc)
- ☐ Affordable Care Act
- ☐ Other

Please enter the other line of business

	<div> <p>What is your preferred Medicare Advantage carrier? (select up to 2)</p> <div> <input type="checkbox"/> Anthem <input checked="" type="checkbox"/> BlueCross BlueShield regional carrier <input type="checkbox"/> Centene / Wellcare <input type="checkbox"/> Cigna <input type="checkbox"/> CVS Aetna <input type="checkbox"/> Devoted Health <input type="checkbox"/> Humana / Careplus <input type="checkbox"/> United Healthcare <input type="checkbox"/> Other </div> <div>Please enter the other carrier</div> <p>Why do you prefer that carrier?</p> <div>test</div> <p>Approximately how much of your annual Medicare Advantage business do you sell during AEP, relative to OEP and lock-in? *</p> <div>0-25%</div> <p>Do you currently work in the community or table any retail locations? *</p> <div>I work in the community (ie. tables, festivals, etc) and/or table retail locations</div> <p>Is there anything else you'd like to share with us today?</p> <div>test</div> <div> <div>Back</div> <div>Continue</div> </div> </div>
<p>9) Code of Conduct - All users</p>	<ul style="list-style-type: none"> The code of conduct will be displayed, you can review or download a copy for your records. Once you have reviewed this information please select the acknowledgement buttons below to ensure you can proceed to the next step. <p>Code of Conduct Acknowledgement</p> <p>Click the button below to open the document in a new window.</p> <div>View Code of Conduct</div> <p><input checked="" type="checkbox"/> I acknowledge that I have read and understand the Code of Conduct. *</p> <p>* Code Of Conduct Signature:</p> <div>Vivian Hua</div> <p>✔ Signature accepted. Clear Signature</p>

<p>10) Agent Agreement - All users</p>	<ul style="list-style-type: none"> The applicable agent agreement will be displayed, you can review or download a copy for your records. Once you have reviewed this information please select the acknowledgement button to ensure you can proceed to the next step. <p>Agent Agreement</p> <p>Click the button below to open the document in a new window.</p> <p>View Agent Agreement</p> <p><input checked="" type="checkbox"/> I acknowledge that I have read and understand the Agent Agreement. *</p> <p>* Agreement Signature:</p> <p>Vivian Hua</p> <p>✔ Signature accepted. Clear Signature</p>
<p>11) Background Check Consent - All users</p>	<ul style="list-style-type: none"> The Background check consent will be displayed for your review. Once you have reviewed this information you must enter your social security number. Click in the box to sign the form and type in your full name. The date will be preset, please select the continue button. <p>AGENT CERTIFICATION</p> <p>Background Check Consent</p> <p>Click the button below to open the document in a new window.</p> <p>View Background Check Agreement</p> <p>I acknowledge that I give my consent for Devoted Health to run a background check.</p> <p>* Social Security Number:</p> <p>*****</p> <p>* Consent Signature:</p> <p>Travis Hutchins 2</p> <p>✔ Signature accepted. Clear Signature</p> <p>Signed: 6/17/2025</p> <p>Back Continue</p>

<p>12) Certification Trainings - <i>All users</i></p>	<ul style="list-style-type: none"> ● If you have a completed AHIP, PinPoint, or NABIP (formerly NAHU) certificate, upload a copy by selecting the upload certificate button. ● If you would like to review what certificates we will accept, this can be done by clicking on the Show sample button. ● You can complete the AHIP certificate by clicking the launch AHIP link - it will open up the AHIP site where you can get a \$50 discount at checkout. ● Please note If you have completed the AHIP course <u>while using our link you can have your score “transmitted” to Devoted Health</u> once you have access to your certificate. This can help us to confirm your results! 
<p>13) Certification Exam - <i>All users</i></p>	<ul style="list-style-type: none"> ● Access our Devoted Health Product Training by clicking the Launch Product Training button in the center of the page as seen below. <ul style="list-style-type: none"> ○ This will go through a presentation that will have an interactive experience and guide you through our product offerings, markets, and much more. ○ <i>Please note if you have to leave the training for any reason your progress will now be saved.</i> ● Once you have completed the training, you will select the Continue to Exam Instructions button at the bottom of the page. Then select Continue to Exam.

Product Training

PY2026 Devoted Health Product Training

The 2026 Agent Certification & Product Training informs you on how to compliantly market Devoted Health benefits and satisfy the annual CMS Medicare Compliance Program requirements.

Launch Product Training

Back

Continue to Exam Instructions

MENU

2026 Certification

2026 Agent Certification Training

Introduction

Start

Introduction

The Devoted Difference

Devoted Health's 5 Core Ingredients

More On Our Guides

What is the outcome?

We have Agent Support Associates tool

2.9 Agent Portal


Multiple Choice

Multiple Choice

2026 Coverage Area

2026 Agent Certification Training

2026 Agent Certification Training



RESOURCES

Certification Exam

State Capitals - 2026

Attempts Remaining: 3

Things to keep in mind

- You have 3 attempts to pass the exam
- Passing score = 85% or higher
- Each time the exam is initiated counts as an attempt
- You should complete the exam in one sitting (~30 mins)

What to expect next

Once you pass the exam, we will process your state appointments. You will receive an email notification when you are Ready to Sell and approved to market and sell Devoted Health benefits.

Back

Continue to Exam

- This will open up this screen where the test will be completed.
 - You will have 3 attempts total and 1 hour per attempt. Once you start an exam you cannot exit and come back as it will count as an attempt.
 - All questions and answers will be randomized in each attempt

Devoted

PY2026 Devoted Agent Certification Exam

Attempts Remaining

Things to keep in mind

- You have 3 attempts to pass the exam
- Passing score = 85% or higher
- Each time the exam is initiated counts as an attempt
- You should complete the exam in one sitting (~30 min)

Welcome to the Certification Exam

The Certification Exam verifies that you know how to compliantly market Devoted Health benefits, and satisfies the annual CMS Medicare Compliance Program training requirements.

You will have a total of 3 attempts to pass the exam with a score of 85% or higher. When you're ready, click the start button below to initiate the exam (this will count as an attempt). You have 60 minutes to complete the exam. You can refresh this page without losing your progress, but the timer will not stop.

Start Exam

- Once you have completed and passed the Exam, you will see the following page.
 - You will be given the option to continue to the final page of your certification. Congratulations!

Devoted

PY2026 Devoted Agent Certification Exam

Attempts Remaining

Things to keep in mind

- You have 3 attempts to pass the exam
- Passing score = 85% or higher
- Each time the exam is initiated counts as an attempt
- You should complete the exam in one sitting (~30 min)

HOW YOU SCORED

You PASSED the Devoted Health certification exam.

Great work! You've passed.

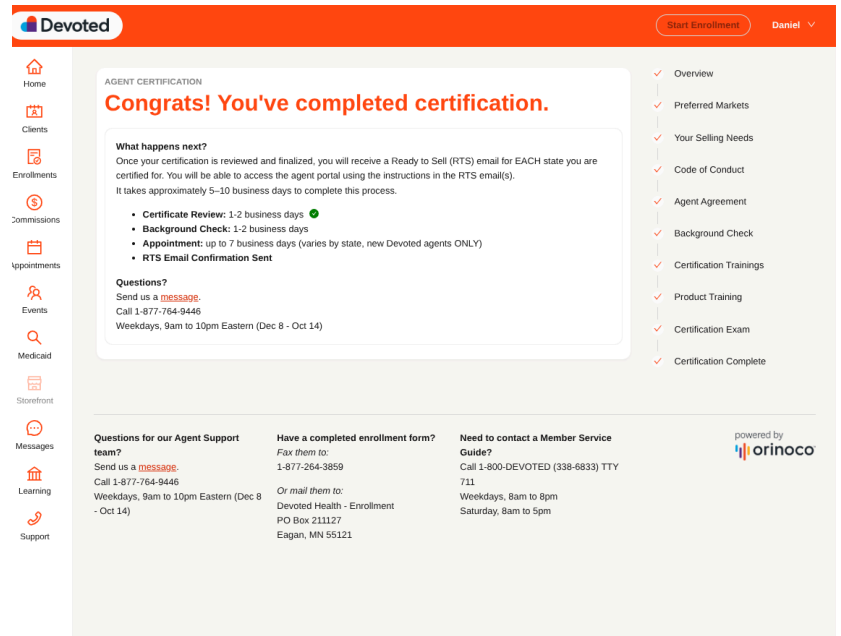
The last step is for Devoted Health to review and finalize your certification.

If you have any questions please contact Agent Support at agent-support@devoted.com or [1-877-764-9446](tel:1-877-764-9446).

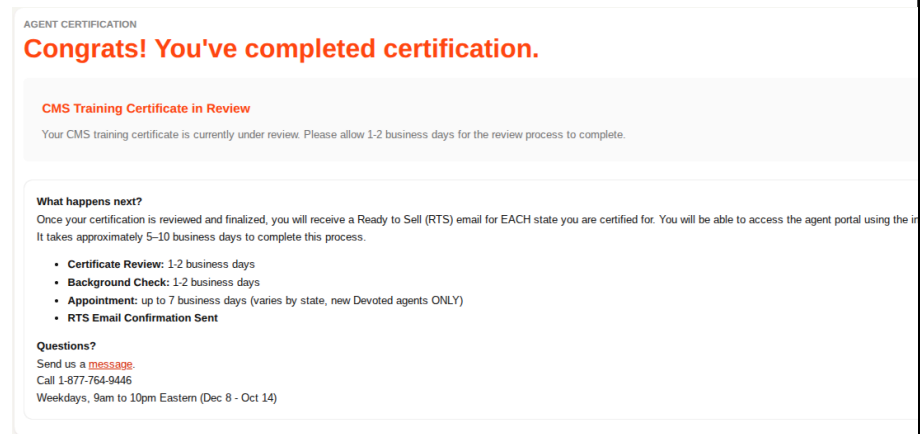
Continue

Certification
Complete - All
Users



- Once your certification is complete, the results for your CMS training certificate submission will be available to view.
 - If your certificate passed our requirements you will see a green checkmark next to Certificate review:



- If your submission is under review, you will see the following screen:



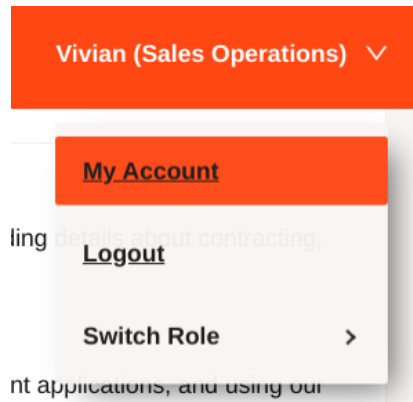
- If your submission failed our requirements, you will see the following screen which will give our requirements in detail and you will be asked to reupload a certificate which meets our

	<p>requirements:</p> <p>AGENT CERTIFICATION</p> <p>Congrats! You've completed certification.</p> <p>CMS Training Certificate Re-upload Required</p> <p>It appears the CMS certificate you provided was rejected after internal review. Your submission did not meet one or all of the following requirements:</p> <ul style="list-style-type: none"> • Certificates must be directly from one of our approved providers: AHIP, NABIP, or PinPoint. • Certificates must show that the completed course is for the most recent course/current plan year. • The name on your certificate matches exactly to your name in your Devoted agent portal account. <p>Re-submit your CMS certificate for review. Please allow 1-2 business days for our team to process the new certificate.</p> <p>- Agent Contracting Team</p> <p>PY2026 Core Medicare Training (AHIP, PinPoint, NABIP (formerly NAHU))</p> <p>You will need to provide a 2026 CMS Training Certificate; we accept certificates from AHIP, PinPoint, or NABIP (formerly NAHU).</p> <p> What does a CMS Training Certificate look like? Not sure which file to upload? Click below to see an example of what your CMS training certificate should look like.</p> <p>Show Example Certificate</p> <p>Please upload your 2026 AHIP, Pinpoint or NABIP (formerly NAHU) certificate:</p> <p> Upload Certificate</p> <p>Submit New Certificate</p> <ul style="list-style-type: none"> ○ After your second attempt has been uploaded please allow 10 seconds to pass and refresh your page. If you see a green check mark then your submission has passed. If not a member from our internal agent onboarding team will contact you to assist you.
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III. Update your Demographics & Financial Information

You can view and update your financial information in your Agent Portal account by following the steps outlined below:

- Login to your [Agent Portal](#) account.
 - If you need assistance with your username as password credentials please contact us.
- On the top right hand corner of the page you will see your name, select it and you will see a dropdown menu.
 - Select “My Account”.



- This will display your demographic and financial information as seen below:

Account Information
FIRST NAME
LAST NAME
BIRTH DATE
EMAIL
PHONE
TEXT MESSAGE CONSENT

Contact Information
STREET ADDRESS
STREET ADDRESS 2
CITY
STATE
ZIP

- If you need to update your financial information
- Click on the “Edit” button in the W-9 or Direct Deposit section to make the necessary changes

W-9 Edit

We are missing important details for you. Please complete this section to avoid disruption to your agent account.

[Add W-9 Information](#)

Direct Deposit Edit

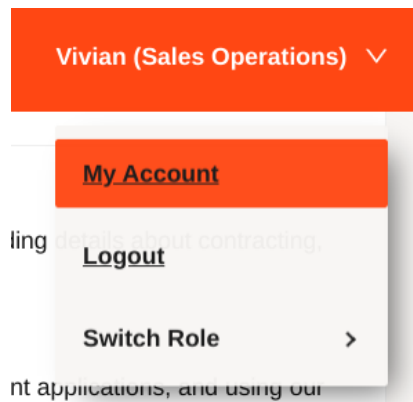
We are missing important details for you. Please complete this section to avoid disruption to your agent account.

[Add Direct Deposit](#)

Update your State Licenses

You can easily update the states where you're licensed directly in your Agent Portal. Just follow the steps below:

- Log in to your Agent Portal account. In the top right corner, click on “ My Account”.



- Go to the “Ready to Sell Overview” section.
- Click on “Update States.”

2026 READY-TO-SELL OVERVIEW Update States

Ready To Sell	Outstanding	Certification

- Select or remove states as needed. Choose the states you are currently licensed to sell in. Once you've made your updates, click “Save.”

☐ Mississippi
 ☒ North Carolina
 ☐ Oregon
 ☒ South Carolina
 ☒ Texas
 ☐ Missouri
 ☐ Ohio
 ☐ Pennsylvania
 ☐ Tennessee
 ☐ Washington

Important:

Agents are only permitted to market and sell in states where they are both licensed and have selected the state in their Devoted Health profile.

IV. Messages

Onboarding Status

If you have any questions or concerns during onboarding, you may contact our Devoted team by calling into the Agent Support line or send a message on your Agent Portal account. The messages icon is located on the side menu to the left of the page. Our Agent Support team will respond to your message within 2 business days.

AGENT CERTIFICATION

Agent Certification Overview for 2026

How it works

You'll need to complete our certification process to be ready to sell. The Center for Medicare & Medicaid Services (CMS), the federal agency that oversees Medicare, requires all employed or contracted agents to meet their licensing, appointment (if applicable), and certification requirements to sell or market Medicare products. You'll need to complete the following steps:

- **Agent Agreement**
- **Code of Conduct Acknowledgement**
- **Background Check Consent**
- **Certification Trainings**
 - Medicare Core Training or equivalent (AHIP, Pinpoint, or NABIP (formerly NAHUJ))
 - CMS, Fraud, Waste & Abuse Training or equivalent (AHIP, Pinpoint, or NABIP (formerly NAHUJ))
 - CMS Compliance Training or equivalent (AHIP, Pinpoint, or NABIP (formerly NAHUJ))
 - Devoted Health Product Training
- **Devoted Health Certification Exam**
 - You'll have 3 attempts to pass the exam with a minimum score of 85%
 - Each time the exam is initiated it will count as an attempt and must be completed in one sitting (~30 mins)

We will save your progress if you can't finish the entire certification process all at once. We will also conduct a license check as part of the certification process.

Once you complete the certification process and have "Ready to Sell" (RTS) status, you will receive notification both via email and in the agent portal for the appropriate plan years. You cannot market or sell Devoted Health benefits until you've received this email. If you've completed the certification process but have not received an email, please contact Devoted Health's Agent Support at [877-764-9446](tel:877-764-9446).

How long does the certification process take?

It takes approximately 4-12 business days to review and process the certification.

- **Certificate Review:** 1-2 business days
- **Background Check:** 1-2 business days
- **Appointment:** up to 7 business days (varies by state, new Devoted agents ONLY)

Have questions or need help?

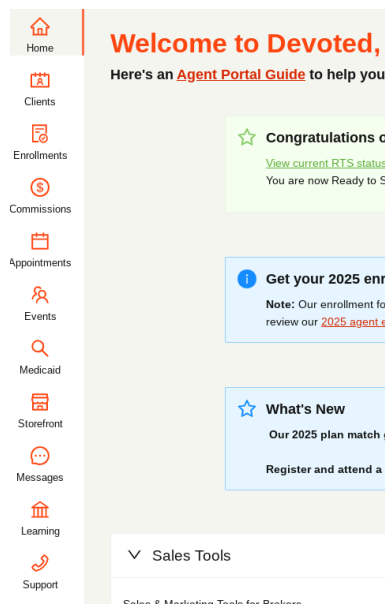
Call Agent Support at [877-764-9446](tel:877-764-9446). Weekdays, 9am to 10pm Eastern (Dec 8 - Oct 14)

Overview

- Preferred Markets
- Your Selling Needs
- Code of Conduct
- Agent Agreement
- Background Check
- Certification Trainings
- Product Training
- Certification Exam
- Certification Complete

In Review and Active Status

When you have completed certification, the rest of the icons on the side menu will also be displayed. *Please note, agents in review status will not be able to access the Storefront until certified.*



Rejected CMS Certification

If the CMS certification submitted during onboarding does not meet the requirements, you will be notified at the end of the certification process.. The notification will look like this:

AGENT CERTIFICATION

Congrats! You've completed certification.

CMS Training Certificate Re-upload Required

It appears the CMS certificate you provided was rejected after internal review. Your submission did not meet one or all of the following requirements:


- Certificates must be directly from one of our approved providers: AHIP, NABIP, or PinPoint.
- Certificates must show that the completed course is for the most recent course/current plan year.
- The name on your certificate matches exactly to your name in your Devoted agent portal account.

Re-submit your CMS certificate for review. Please allow 1-2 business days for our team to process the new certificate.

- Agent Contracting Team


PY2026 Core Medicare Training (AHIP, PinPoint, NABIP (formerly NAHU))

You will need to provide a 2026 CMS Training Certificate; we accept certificates from AHIP, PinPoint, or NABIP (formerly NAHU).

 **What does a CMS Training Certificate look like?**
Not sure which file to upload? Click below to see an example of what your CMS training certificate should look like.

[Show Example Certificate](#)

Please upload your 2026 AHIP, Pinpoint or NABIP (formerly NAHU) certificate:

 **Upload Certificate**

[Submit New Certificate](#)

- To upload the new certificate, click on the “Upload Certificate” button and then the “Submit New Certificate” button. Once a new certificate is submitted please allow 10 seconds to pass before refreshing the page.
- Once a certificate is accepted, this will be confirmed by the following screen showing a check mark within a green circle next to the Certificate Review section.


AGENT CERTIFICATION

Congrats! You've completed certification.

What happens next?

Once your certification is reviewed and finalized, you will receive a Ready to Sell (RTS) email for EACH state you are certified for. You will be able to access the agent portal using the instructions in the RTS email(s).

It takes approximately 5–10 business days to complete this process.

- **Certificate Review:** 1-2 business days 
- **Background Check:** 1-2 business days
- **Appointment:** up to 7 business days (varies by state, new Devoted agents ONLY)
- **RTS Email Confirmation Sent**

Questions?

Send us a [message](#).

Call 1-877-764-9446

Weekdays, 9am to 10pm Eastern (Dec 8 - Oct 14)

Questions for our Agent Support team?
Send us a [message](#).
Call 1-877-764-9446

Have a completed enrollment form?
Fax them to:
1-877-264-3859

Need to contact a Member Service Guide?
Call 1-800-DEVOTED (338-6833) TTY 711
Weekdays, 8am to 8pm

Important

Please allow 2 business days for our Sales Operations team to review the newly uploaded certificate.

Questions?

Contact us at 1-877-764-9446 or send us a message on your Agent Portal account. Or contact your local [Devoted Sales Leader](#).