

# Broker Onboarding Journey

How Devoted engages with brokers, from certification to app submission and member retention

## MARCH TO MAY

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### Precertification

- If you're a new agent, you can register with Devoted if you're with an agency or if you work as an independent agent by visiting our [Broker Certification page](#).
  - Located in a new PY27 Devoted state? Registering ensures that you get important updates, including information on our PY27 certification and broker rollout events.
  - Located in a state where Devoted plans are already offered? You can complete Devoted's existing certification course to become "Ready-to-Sell" (RTS) with us for PY26.

## JUNE

2

### PY27 Devoted certification

- PY27 certification opens on 6/23 to become RTS.
  - Certification blackout period: 6/13 to 6/22
  - By certifying for PY27, agents in our existing states will automatically become RTS for PY26.
- Look out for a "Welcome to Devoted" email to confirm that you're RTS.

## JUNE TO SEPTEMBER

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### Initial onboarding

- After certifying, look out for several communications from Devoted Health.
  - You'll receive an invitation to attend one of our agent onboarding training sessions.
  - We'll also email you to introduce local sales teams, essential tools, and resources.
- Attend a local Devoted introductory event (in select states) and/or a local broker rollout event.
- Review our PY27 benefits in our First Look, and compare plans via our Broker Plans-at-a-Glance (B-PAG), a spreadsheet planning tool.
- Take a sneak peek at our provider directory via the Agent Portal in late August.
- Order PY27 enrollment materials.
  - Preorder paper enrollment kits starting in late August.
  - Download digital enrollment kits starting in early September.
- Join one of our national webinars, where we'll do a deep dive on supplemental benefits, broker tools, and more leading up to the Annual Enrollment Period (AEP).
- Connect with our local teams! Meet Devoted broker managers, community outreach specialists, and more at a training or social event in your market — and start scheduling events for AEP.

## OCTOBER TO DECEMBER

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### AEP

- Start selling! Our Agent Support and local teams are dedicated to helping you achieve your AEP goals.
- Stay organized! Selling is easier with Devoted's Agent Portal.
  - Submit and track applications and Scopes of Appointment (SOAs).
  - Track member statuses.
  - Access digital member ID cards and view the status of physical ID cards.
  - Download and upload Chronic Condition Special Needs Plan (C-SNP) verification forms.
  - View commissions statements (if applicable).
  - Access our Learning Center for frequently asked questions (FAQs) and other resources.
- Look out for an email with our post-AEP survey to provide valued feedback.

## ONGOING

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### Onboarding and retaining new members

- Support your clients through their first 90 days of enrollment.
  - Encourage primary care provider (PCP) selection and help your clients book their first appointment.
  - Host New Member Orientations to help members make the most of their benefits.

#### Key dates

- **6/13 to 6/22:** Devoted certification blackout period
- **6/23:** PY27 Devoted certification opens
- **Late June:** Introductory Devoted events kickoff
- **Late June:** PY27 Devoted Insiders (product portfolio preview) released
- **Mid-August:** PY27 Broker Plans-at-a-Glance (B-PAG) released
- **Late August:** PY27 broker rollout events kickoff
- **Late August:** PY27 First Look released

#### Key resources

- [Broker Homepage](#)
  - [Agent Portal Homepage](#)
  - [Member Experience Onboarding Journey](#)
  - [Local Sales Leader Contact Page](#)
- Contact your local sales leader if you have any questions.