







## Broker OnBoarding Management

EvolveOB Streamlines the onboarding process to seamlessly integrate producers with the system to interact with other modules. Onboarding automation allows for bulk case management while being flexible to client specific requirements. EvolveNEXT integrates with NIPR via API to validate producer information. Emails are sent to producers upon onboarding case creation as well as onboarding approval.

### Module Features

-  Onboarding case creation sources for Admins and Agencies
-  Allows for configuration of producer information, training material and contracts
-  Declare active license states
-  Upload and review of documents such as AHIP an W9
-  Utilized for recertification and new agreements
-  Add NPNS to an exclusion list to prevent certain producers from being onboarded

EvolveNEXT is the health care industry's leading sales channel management and incentive compensation software platform providing a one stop solution for all lines of business

## What separates Evolve from the competition?

One Stop Shop  
Sales Channel Management  
Onboarding, Commissions,  
Portal

Deep Domain Expertise  
Seamless Integration  
with External Systems

Rapid & Turnkey  
Implementation, Highly  
Responsive Customer  
Service



### Commissions Payment

#### EvolveICM

Producer Commission Management

#### EvolveHCS

Self -Service Hierarchy Change System

#### EvolvePDB

NIPR Daily Automatic Credentials Updates

#### EvolvePay

Direct Bank ACH Payments via NACHA



### Broker Contracting and Certification

#### EvolvePM

Producer Portal and Notification Management

#### EvolveDOI

Appointment Management

#### EvolveTMS

Training Management Solution

#### EvolveOB

Producer Onboarding

#### EvolveIBC

Integrated Background Check



### Broker Services

#### EvolveDOC

Document Management Solution

#### EvolveTSM

Ticketing and Sales Support Management

#### EvolveOEC

Centralized OEC Processing (Connecture, SunFire)

#### EvolveSCM

Marketing Material Order Management

#### EvolveTMO

Target Member Outreach (HEDIS & Star Ratings)



### Sales Execution

#### EvolveLMS

Lead Management System

#### EvolveSOA

Scope of Appointment

#### EvolveBAE

Broker Assisted Enroll

#### EvolveCM

Campaign Management

#### EvolveMSE

Member Self Enroll

#### EvolveHRA

Health Risk Survey and Incentive