

Evolve HCS Module – Transfers (Brokers)



Account Info

EDIT ACCOUNT INFO

Personal Information

First Name

Last Name

User Phone

Business Phone

Mobile Phone

Marketing Phone

For Dual Authentication and SMS

Email

Note: This email is used for receiving notifications. Updating this email will affect you.

Address Information

BUSINESS

Address

City

State

Zip

[Account Info](#) section under **My Account** will allow Brokers to update their personal information, Business, Home and Shipping Address

Click **Edit Account Info** to make edits and click **Save** to capture any edits made.

[My Hierarchy Info](#) section under **My Account** will display one level of hierarchy between the agency and agent

My Hierarchy Info

⌵ ⌴	Broker	⌵ ⌴	NPN	⌵ ⌴	Start Date	⌵ ⌴	End Date	⌵ ⌴	Sales Level	⌵ ⌴	Upline Name	⌵ ⌴	Assigned Comp Name	⌵ ⌴	Sub Type	⌵ ⌴	Broker Type	⌵ ⌴	
					01/01/2014				01 - Agent						Licensed Only Agent		Field Broker		
Showing 1 to 1 of 1 entries																			
															FIRST	PREVIOUS	1	NEXT	LAST

NAVIGATION

- Dashboard
- Statements
- Book of Business
- Medicare App Status
- Docs & Resources
- My Credentials
- My Account
- Account Info
- My Hierarchy Info
- Medicare Training
- ID Cards & PCP Changes
- Workflows
- Member Eligibility

The [My Hierarchy Info](#) page provides details about the broker's current contracting and hierarchy structure. It also includes historical data, showing previous assignments by Line of Business and their associated effective dates.

Brokers can submit requests to update their Hierarchy and/or assigned Sub Types directly from this page by clicking **Change**.

	LOB	Broker	NPN	Start Date	End Date	Sales Level	Upline Name	Assigned Comp Name	Sub Type	Broker Type
CHANGE	Medicare Advantage	Roberto Sanchez	121220186	10/13/2022		01 - Agent	STONESTEP PLAN ADVANTAGE, LLC	STONESTEP PLAN ADVANTAGE, LLC	Downline Only	Field Broker
CHANGE	ACA	Roberto Sanchez	121220186	01/21/2022		01 - Agent	STONESTEP PLAN ADVANTAGE, LLC	STONESTEP PLAN ADVANTAGE, LLC	Licensed Only Agent	Field Broker
	Medicare Advantage	Roberto Sanchez	121220186	02/01/2018	01/02/2019	01 - Agent	STONESTEP PLAN ADVANTAGE, LLC	STONESTEP PLAN ADVANTAGE, LLC	Dual Assignment	Field Broker
	Medicare Advantage	Roberto Sanchez	121220186	10/03/2017	01/31/2018	01 - Agent	STONESTEP PLAN ADVANTAGE, LLC	STONESTEP PLAN ADVANTAGE, LLC	Dual Assignment	Field Broker

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Select the appropriate change request from the **Hierarchy Change Options**, then select a **New Sub Type Options**, then **Search**.

Broker NPN	Broker Name	Broker Type	Current Sub Type
12322181	Roberto Escobar	Field Broker	Downline Only

Current Next Upline Broker/Agency	Current Commission Assign	Start Date	End Date
PLAN ADVISORS, LLC	Roberto Escobar	10/13/2022	

Producer Type and Hierarchy Management

Hierarchy Change Options

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Request Hierarchy Change

New Sub Type Options ⓘ

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Join a new upline as a **Licensed Only Agent** sub type

SEARCH

Hierarchy Change Option	New Sub Type Options	Next Step...
Request Hierarchy Change	Join a new upline as a Licensed Only Agent sub type	Search for Next Upline

NAVIGATION

Dashboard

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Medicare App Status

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My Credentials

My Account

Account Info

My Hierarchy Info

Medicare Training

ID Cards & PCP Changes

Workflows

Member Eligibility

This screen appears – click **Search** again and it will give a list of Upline Names and NPN's

New Next Upline Search

Upline Name

Upline NPN

Search

	Broker Name	Broker NPN
SELECT		
SELECT		
SELECT		
SELECT		
SELECT		
SELECT		

From the list **Select** the Next Upline

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Broker NPN	Broker Name	Broker Type	Current Sub Type
		Field Broker	Licensed Only Agent
Current Next Upline Broker/Agency	Current Commission Assign	Start Date	End Date
		11/16/2024	

Producer Type and Hierarchy Management

Hierarchy Change Options

Request Hierarchy Change

New Sub Type Options

Join a new upline as Licensed Only Agent sub type

Next Upline

SEARCH

Add a comment to this workflow request:

UPDATE

Please note: The information in this workflow may be visible to all involved stakeholders, including your current hierarchy.

Add comments if applicable then click **Update**

Review processing and timeframe summary then **Submit Request**

Hierarchy Change Request Summary

Your request will be submitted to for review and approval. If approved, the change will take effect as outlined below:

- Execution Date:**
 Hierarchy change requests may take up to **90 days** to process. If both your **requested new hierarchy** and your **current hierarchy** approve the request, the change will be executed on the **next business day following approval**.
 - If your requested new hierarchy denies the request, you will receive a notification through your portal.
 - If your current hierarchy denies the request, the change will automatically take effect on the **91st day**, following a constructive release.

Note: There is an active blackout period from **10-01-2025** to **01-31-2026**. If your execution date falls within this period, then the execution time will be set to the day after the blackout period ends, on **02-01-2026**.

CANCEL

SUBMIT REQUEST

NAVIGATION

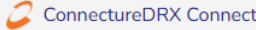
[Dashboard](#)
[Statements](#)
[Book of Business](#)
[Medicare App Status](#)
[Docs & Resources](#)
[My Credentials](#)
[My Account](#)
[Medicare Training](#)
[ID Cards & PCP Changes](#)
[Workflows](#)
[Member Eligibility](#)

You will be notified with an alert next to **Workflow** menu option

Workflows by default it will be sorted by **Status**
(Pending, Denied, Approved) related to your Hierarchy Change Request

Use the **Status** and **Type** dropdown filters or **Search** to narrow down results.

Workflows





Status

Type

SEARCH

Show 10 entries

Search:

	Type	Status	Requestor	Approver	Execution Date	Last Updated
View	Hierarchy - ACA	Pending			N/A	11/03/2025 11:39 AM PST
View	Hierarchy - ACA	Pending Release Approval			N/A	01/29/2026 02:47 PM PST

Submitted request now shows **Pending Release Approval**