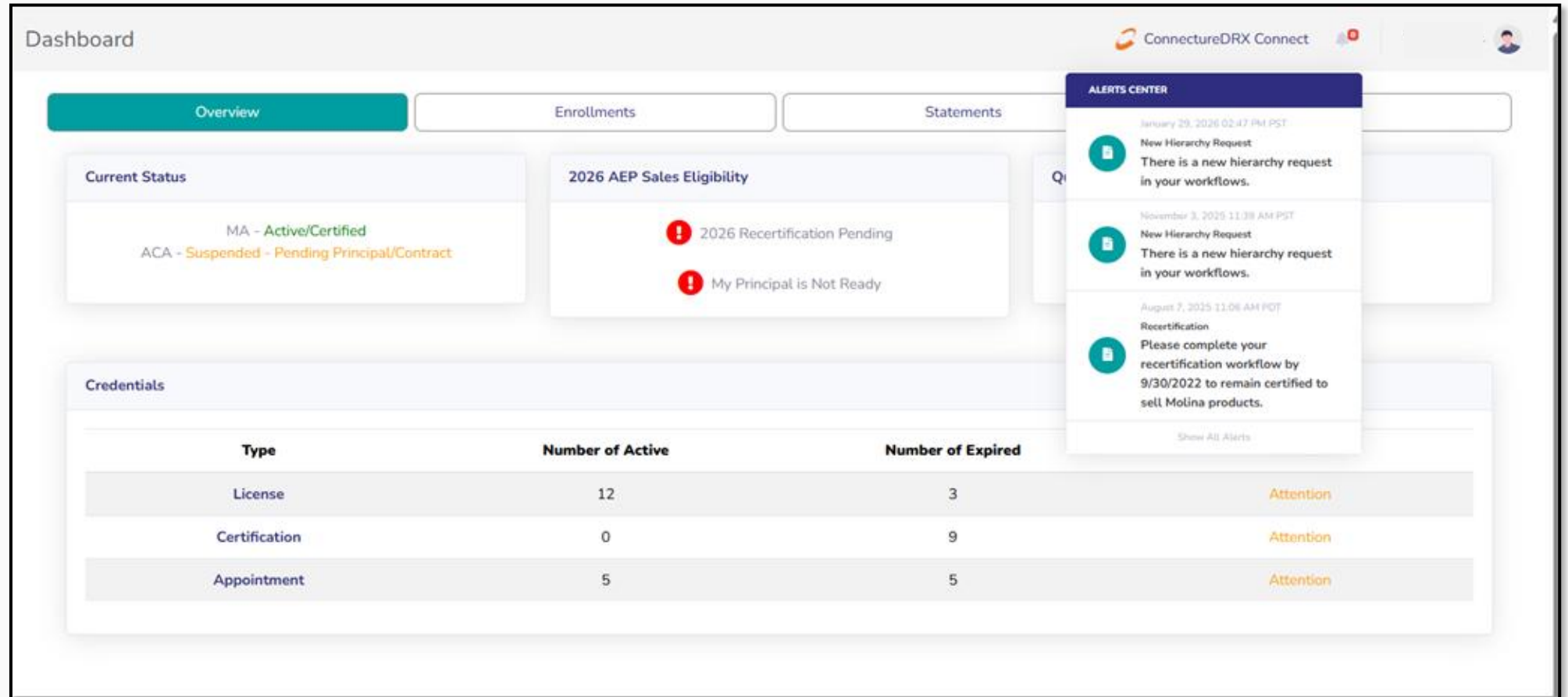


Evolve HCS Module – Transfers (Agencies)



Initial request goes to Proposed New Upline –
a **Notification Bell** will alert you “there is a new hierarchy request in your workflow”



The screenshot shows the 'Dashboard' interface with a sidebar on the left containing navigation links: Dashboard, Statements, Book of Business, Medicare App Status, Docs & Resources, My Credentials, My Account, Medicare Training, ID Cards & PCP Changes, Workflows (highlighted with a red badge with the number 1), and Member Eligibility. The main content area has tabs for Overview, Enrollments, and Statements. The 'Overview' tab is active, showing 'Current Status' (MA - Active/Certified, ACA - Suspended - Pending Principal/Contract) and '2026 AEP Sales Eligibility' (2026 Recertification Pending, My Principal is Not Ready). A 'Credentials' table is also visible. On the right, an 'ALERTS CENTER' dropdown menu is open, displaying three alerts: 'New Hierarchy Request' (January 29, 2026), 'New Hierarchy Request' (November 3, 2025), and 'Recertification' (August 7, 2025).

Type	Number of Active	Number of Expired	Attention
License	12	3	Attention
Certification	0	9	Attention
Appointment	5	5	Attention

Workflows will also have a number listed to alert you

NAVIGATION

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

1

[Member Eligibility](#)

Workflows by default will be sorted by **Status**
(Pending, Denied, Approved) Hierarchy Change Requests.

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

Status

--

Type

--

SEARCH

Show

10

entries

Search:

	Type	Status	Requestor	Approver	Execution Date	Last Updated
View	Hierarchy - ACA	Pending			N/A	01/29/2026 02:47 PM PST
View	Hierarchy - ACA	Pending			N/A	11/03/2025 11:39 AM PST
View	Hierarchy - ACA	Cancelled			N/A	09/12/2025 11:26 AM PDT
View	Hierarchy	Approved - Pending Banking Info			2025-09-12	09/06/2025 01:22 PM PDT

Showing 1 to 4 of 4 entries

Previous

1

Next

Click **View** on the **Pending** hierarchy request to see details

NAVIGATION

- Dashboard
- Statements
- Book of Business
- Medicare App Status
- My Downline Brokers
- Docs & Resources
- My Credentials
- Agency Users
- My Account
- ID Cards & PCP Changes

Review Comments and select if you will **Accept** or **Deny** the broker to move over to your Agency

Workflow Comments

Comment	User	Date	File
The broker is requesting to join as Licensed Only Agent sub type.		01/29/2026 02:47 PM PST	

[Previous](#)
1
[Next](#)

You have the option to approve or deny joining your hierarchy as a **Licensed Only Agent** broker.
 If you approve this request, then current upline must approve this workflow as well to release from their hierarchy.
 They hierarchy change will take effect depending on the release approval from current Hierarchy.

Note: There is an active blackout period from **2025-10-01 00:00:00.0** to **2026-01-31 00:00:00.0**. If your execution date falls within this period, then the execution time will be set to **02-01-2026**.

Add a comment to this workflow request:

ACCEPT

DENY

Confirmation
×

Are you sure you want to approve this workflow?

CANCEL

APPROVE WORKFLOW

Upon choosing to **Accept** Broker, you'll receive confirmation to **Approve Workflow**

NAVIGATION

- Dashboard
- Statements
- Book of Business
- Medicare App Status
- My Downline Brokers
- Docs & Resources
- My Credentials
- Agency Users
- My Account
- ID Cards & PCP Changes

Workflows 1

Additional request goes to Old Upline for release

Workflows

ConnectureDRX Connect 

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

Click **View** on the **Pending Release Request** to see details

- NAVIGATION
- Dashboard
- Statements
- Book of Business
- Medicare App Status
- My Downline Brokers
- Docs & Resources
- My Credentials
- Agency Users
- My Account
- ID Cards & PCP Changes
- Workflows

Review summary of what happens should you release broker and select **Release** or **Deny**

Workflow Comments

You have the option to approve or deny leaving your hierarchy.
If you approve this request, then will leave your hierarchy effective 2026-01-30.

Note: There is an active blackout period from 2025-10-01 00:00:00.0 to 2026-01-31 00:00:00.0. If your execution date falls within this period, then the execution time will be set to 02-01-2026.

Add a comment to this workflow request:

RELEASE

DENY

Upon choosing to **Release** broker, you'll receive confirmation to **Approve Workflow**

Workflow Comments

If you a6-01-30.

Note: There is an active blackout period from 2025-10-01 00:00:00.0 to 2026-01-31 00:00:00.0. If your execution date falls within this period, then the execution time will be set to 02-01-2026.

Confirmation

Are you sure you want to Approve this request?

CANCELAPPROVE WORKFLOW

NAVIGATION

- Dashboard
- Statements
- Book of Business
- Medicare App Status
- My Downline Brokers
- Docs & Resources
- My Credentials
- Agency Users
- My Account
- ID Cards & PCP Changes

Workflows

You'll be back on the **Workflows** screen and see status updated to **Approved: Within Hierarchy Change Hold Period**

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	Approved: Within Hierarchy Change Hold Period			2025-11-06	01/29/2026 02:47 PM PST