2025 EvolveNXT
Medicare Broker Portal User Guide

Continue

MOLINA HEALTHCARE

6/12/2025

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- ID Cards & PCP Changes
- Workflows

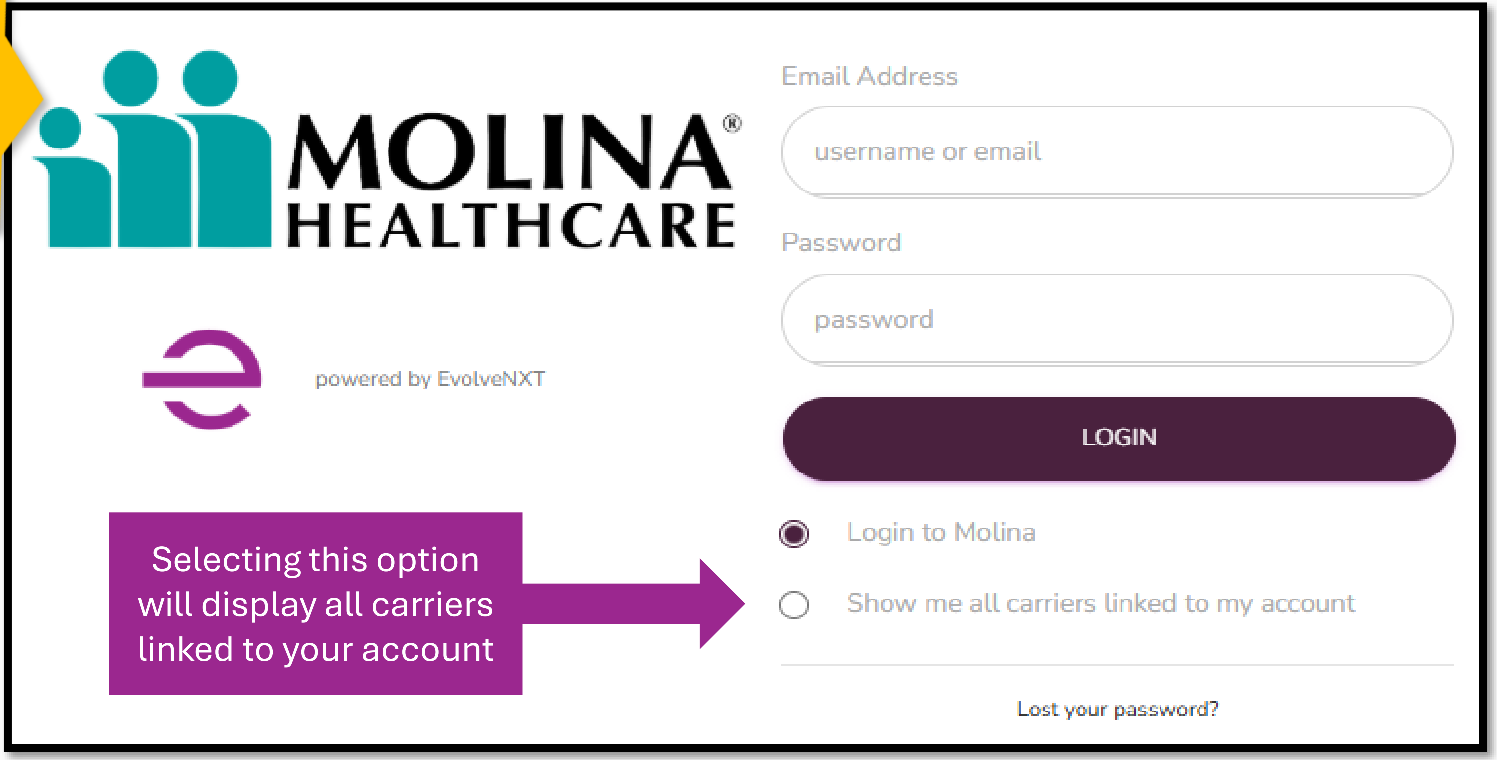
Broker Services Unit
Monday - Friday
6:00 AM – 6:00 PM MT
(866) 440-9788
broker@molinahealthcare.com

EvolveNXT is a comprehensive platform designed to streamline processes for Medicare broker agents, enabling efficient management of commissions, contracting, certification, and client records.
This guide will walk you through key features and functionalities to effectively navigate and utilize the portal.

Users access the Evolve portal through a single account that allows them to manage multiple carriers and lines of business. This streamlined setup eliminates the need for multiple usernames and passwords, providing a more efficient and unified account management experience.

To navigate this User Guide and the portal, use the **Navigation bar** on the left-hand side.

Same broker portal account for Molina Medicare and Marketplace



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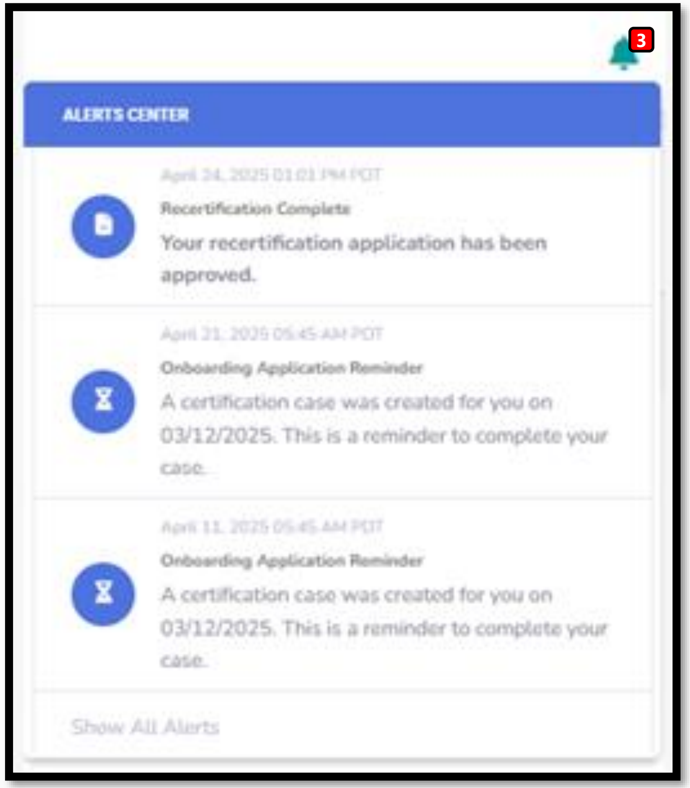
Notifications

If you have unread notifications, a red bade with a number will appear on the notification bell icon. Click the bell to open the Alerts Center.

- Click on a specific alert to view more information
- Select "Show All Alerts" to see the complete list of notifications

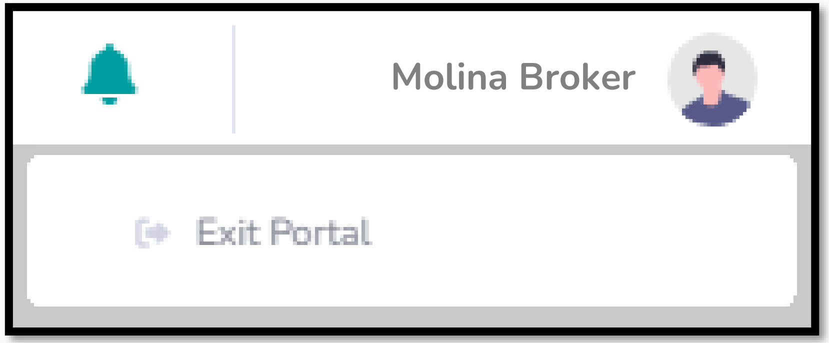


Switch Profiles

Principle-type brokers can switch between their broker and agency profiles. To switch views, click on your profile name and select the desired profile.

Exit the Portal

When you're done using the portal, make sure to log out securely by selecting "Exit Portal" from the profile menu.



Dashboard - Overview

Molina Broker

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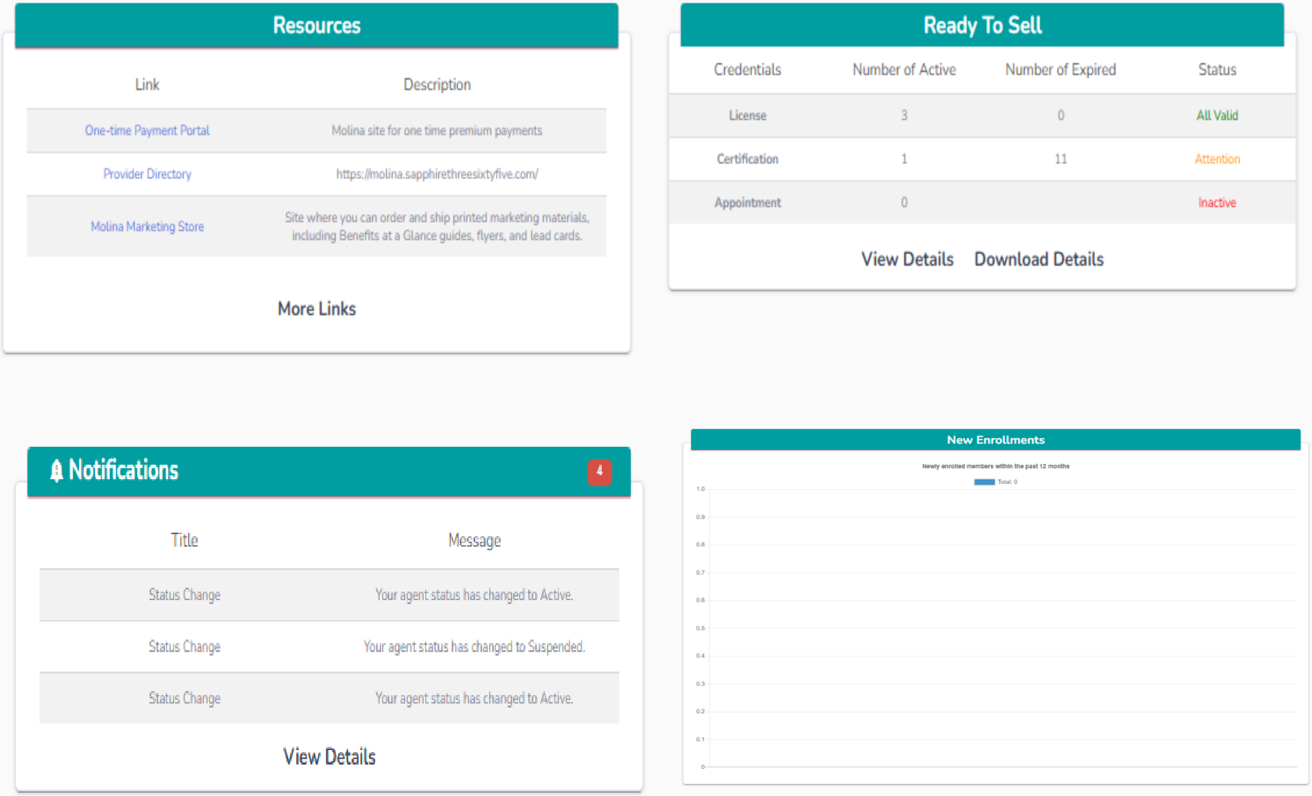
The **Dashboard** gives you quick access to essential information through a variety of widgets, including:

Resources | **Ready To Sell** | **Notifications** | **New Enrollments** |

Click **More Links, View Details** or **Download Details** on the widget to see more information.



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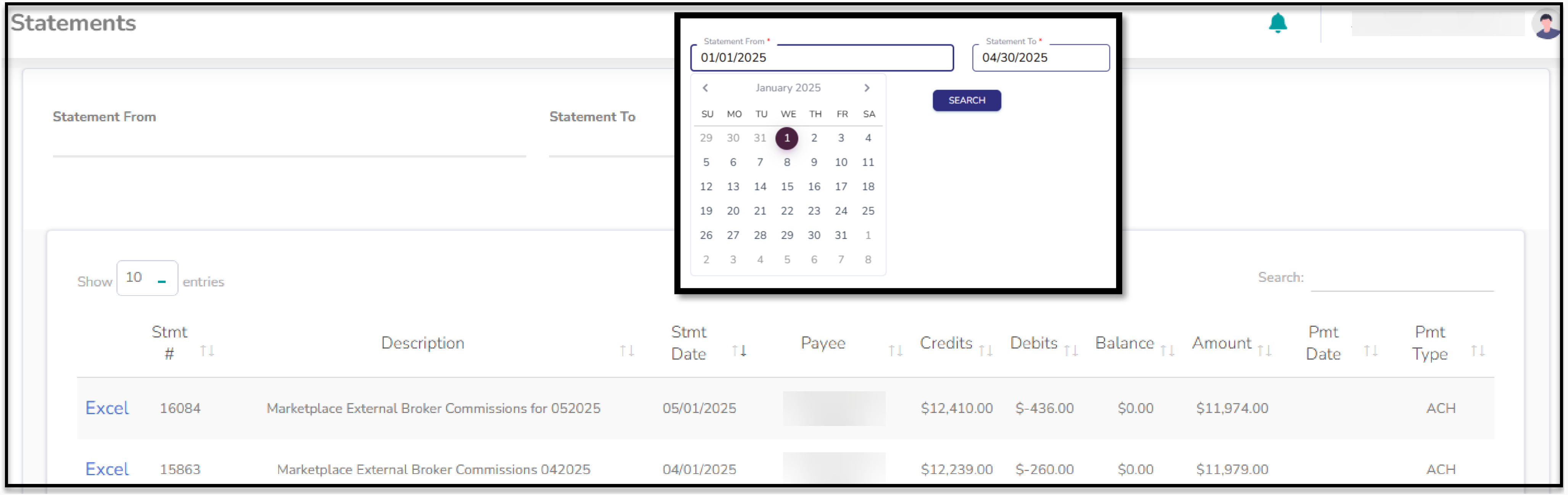
Statements

Molina Broker

💰 Statements – Easily access your payout statements to track income, review payout details and monitor performance.

Enter a date range to search for specific statements. To view all historical statements, leave the From and To fields blank and click Search. Statements will be displayed by Statement Date.

Download the Excel document to view further payout details by member.



Please note that only agents classified as *Downline Only* will have access to Statements. All other agent types should reach out to their agency or contact Molina's Broker Support Unit for any payout-related inquiries.

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Book of Business (BoB)

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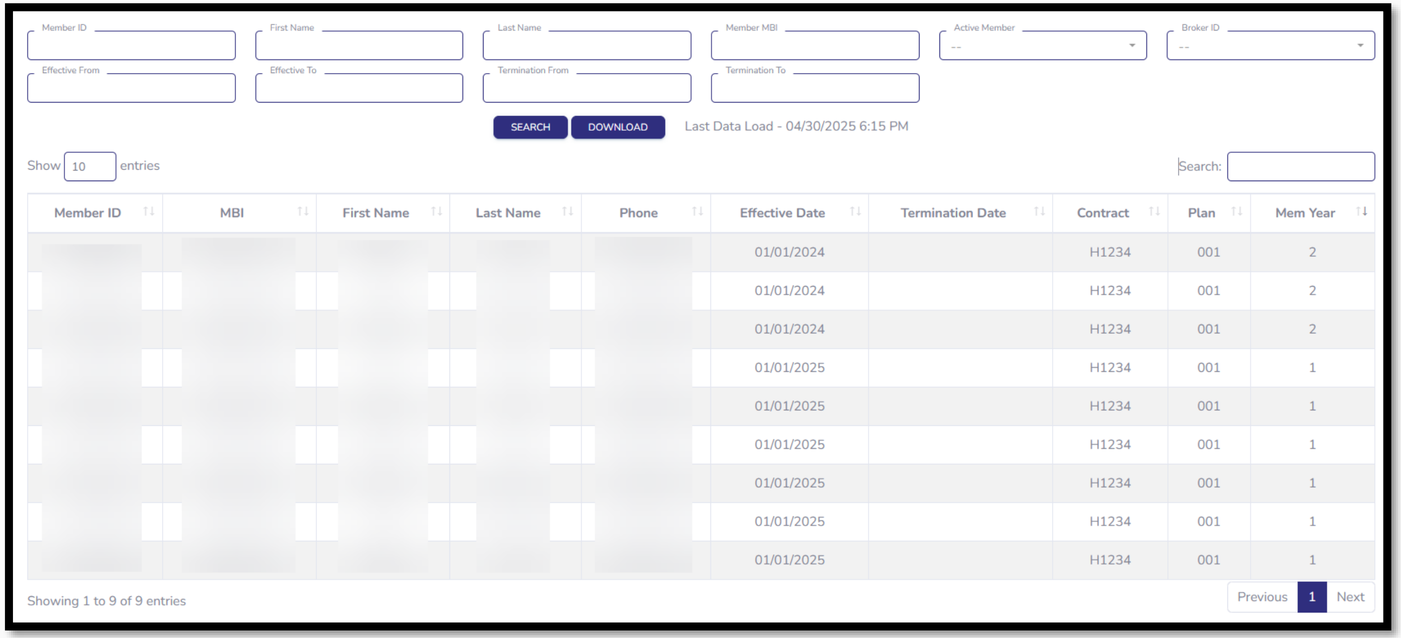
Your Book of Business (BoB) gives you access to your member data—helping you manage relationships, track commissions and stay organized.

Depending on your Role and RTS status, you'll see options for Medicare and Marketplace BoB.

Medicare BoB Search

To view all members: Click Search without entering any criteria.
To filter results: Enter your desired criteria, then click Search.
To download results: After entering your criteria, click Download.
The Excel file includes additional details-such as Member Address and Status that aren't displayed in the table.



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Medicare App Status

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Application statuses are readily accessible, allowing you to keep prospects updated on their progress. Address any issues or missing information promptly to avoid processing delays and effectively manage follow-ups.

For additional support with applications requiring further action, contact your local Broker Channel Manager or the Broker Support Unit.

Application ID | MBI | Application From | Application To

First Name | Last Name | Status | Broker ID

SEARCH DOWNLOAD

Application ID	MBI	Application Date	First Name	Last Name	Status	Broker ID
A M	***NV58	01/27/25			ELGWARNING	
A M	***RE51	01/23/25			DUPLAPPL	
A M	***KG18	01/23/25			COMPLETED	
A M	***WF01	11/22/24			HOLD	

View Full Status List

Medicare App Status

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contact your local Broker Channel Manager or the Broker Support Unit.

Application Status Code	Definition
APPROVED	Passed All Edits and Approved
BEQAPPR	Passed All Edits via BEQ process and Approved
BEQPENDING	BEQ Request Pending
CANCELED	Application is Canceled
COMPLETED	Moved to Membership
DENIEDELG	Eligibility Denied
DENIEDETYP	No Election Type Available
DENIEDOTHR	Application Denied for other reason
DUPLAPPL	Duplicate Application
DUPLENRL	Duplicate Enrollment
ELGCRITICL	Eligibility Error Critical
ELGNOTFND	Eligibility NOT Found
ELGWARNING	Eligibility Error Warning
ERROR	Non-critical Field Error

Application Status Code	Definition
ERRORCRITL	Critical Field Error
FORCEDAPPR	Forced Approval
HOLD	Application process halted
INCOMPLETE	Application is incomplete and saved
INCRFIELCT	Invalid election type
INCRFIGEN	RFI Generated
INCRFIREQ	RFI Requested
INCRFITRG	RFI letter trigger and follow-up trigger created
OPOUTNORSP	No response to OPTOUT received
OPOUTNO	Member elects to enroll
OPOUTGEN	OPT OUT Generated
READY	Application is ready to be processed
READYAPPR	Application Ready for approval
RFINORESP	No response received to RFI

Docs & Resources

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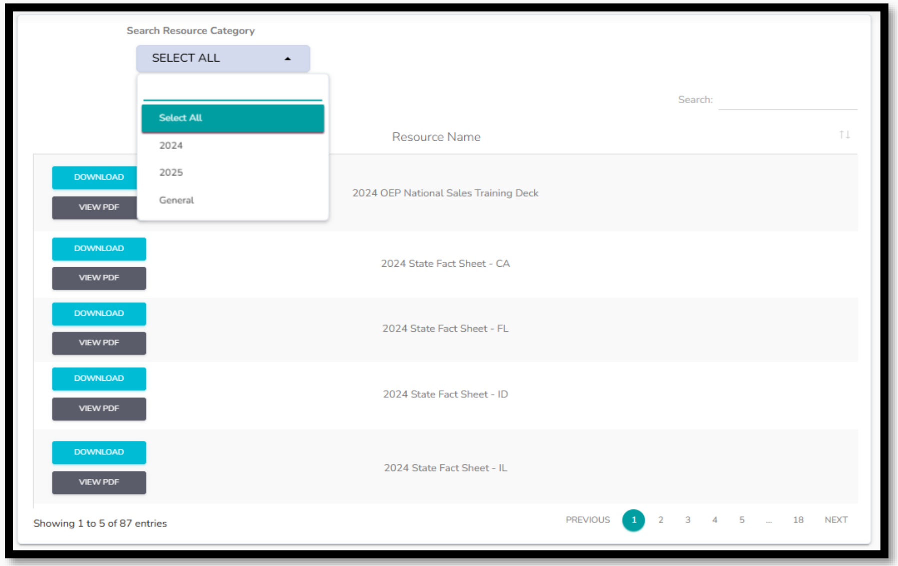
The **Shared Resources** will provide frequently used Broker and Member materials. You can search for available content using the drop-down menu or search field.

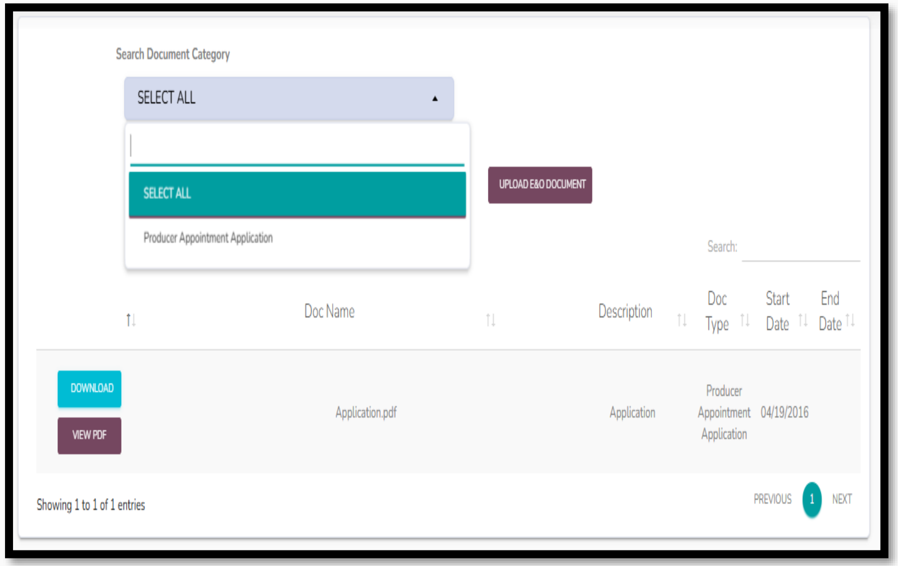
My Documents section, will list all uploaded documents related to contracting and allow you to upload an E&O Document.

Navigate the search results using, **Previous**, **Next** or **Page Numbers** to view results.

Shared Resources



My Documents



My Credentials

The **My Credentials** section is divided into four parts, each providing specific information related to your Ready To Sell status.

My Onboarding Cases
Recertification flow

My Status & Credentials
LOB, Active Contract,
Broker Status

My Sales States
MA & ACA Declared States

My ACA Certificate
ACA Certificates

Continue navigating this section by using the menu on left or using the buttons above

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My Credentials - My Onboarding Cases

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My Onboarding Cases section allows you to review and track your onboarding case history.

Search by Names:

	Creation Type	LoB	Type	Status	Email	NPN	Broker Type	Broker Sub Type	Sales Level	Name	Upline Name	Creation Date	Email Send Date	Year	Submitted By
	Individual	Medicare Advantage	Add LOB	Approved			Field Broker	Direct	Agent - 01			02/19/2025	02/19/2025	2025	

Showing 1 to 1 of 1 entries

First Previous 1 Next Last

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My Credentials - My Status & Credentials

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My Status & Credentials section will have the following Sub-screens:
My Status Info, **Sales States & Licenses**, **Certification Info**, **Application Info**, and **Appointment Info**.
Click on each menu icon to display the information.

My Status Info

MY STATUS INFO | SALES STATES & LICENSES | CERTIFICATION INFO | APPLICATION INFO | APPOINTMENT INFO

Search:

LOB	Active Contract	Active State License	Broker Status
ACA	Yes	Yes	Active/Certified

Sales States & Licenses

MY STATUS INFO | SALES STATES & LICENSES | CERTIFICATION INFO | APPLICATION INFO | APPOINTMENT INFO

The below table lists the Line of Business and states where you have declared sales intent, as well as your license status in each of those states. You can declare additional sales states in Manage My Licenses.

Search:

LOB	State	Resident	License Number	License Class Name	LOA Name	Start Date	End Date	License Status	State Sales Status
ACA	CA	No		Insurance Producer	Accident & Health or Sickness	06-21-2007	06-30-2027	Active	Active/Certified
ACA	FL	No		Agent	Health	05-18-2007		Active	Active/Certified
ACA	ID	No		Insurance Producer	Accident & Health or Sickness	08-13-2008	04-30-2027	Active	Suspended
ACA	IL	No		Insurance Producer	Health	08-12-2008	04-30-2026	Active	Active/Certified
ACA	KY	No		Agent	Health	08-12-2008	04-30-2026	Active	Suspended
ACA	MI	No		Non Resident Producer	Accident and Health	08-15-2008		Active	Active/Certified
ACA	MS	No		Insurance Producer	Accident & Health or Sickness	10-27-2009	04-30-2027	Active	Active/Certified
ACA	NM	No		Insurance Producer	Accident and Health or Sickness	02-01-2012	04-30-2026	Active	Active/Certified
ACA	NV	No		Non Res Producer/Producer Firm	Health	08-14-2008	08-31-2026	Active	Suspended
ACA	OH	No		Major Lines	Accident & Health	01-24-2003	04-30-2026	Active	Active/Certified

Showing 1 to 10 of 15 entries

PREVIOUS 1 2 NEXT

Application Info

MY STATUS INFO | SALES STATES & LICENSES | CERTIFICATION INFO | APPLICATION INFO | APPOINTMENT INFO

Search:

Application Year	Start Date	End Date	Application Status
2023	01/01/2014		Signed

Showing 1 to 1 of 1 entries

PREVIOUS 1 NEXT

Certification Info

MY STATUS INFO | SALES STATES & LICENSES | CERTIFICATION INFO | APPLICATION INFO | APPOINTMENT INFO

Search:

Certification Year	Certification Name	Start Date	End Date	Certification Progress
2025	FFM Certificate	07/31/2024	12/31/2025	100.00
2025	FFM Certificate	07/31/2024	12/31/2025	100.00
2025	California SBM	10/01/2024	12/31/2025	100.00
2025	New Mexico SBM	10/31/2024	12/31/2025	100.00
2024	FFM Certificate	08/11/2023	12/31/2024	100.00
2024	FFM Certificate	08/11/2023	12/31/2024	100.00
2024	California SBM	10/01/2023	12/31/2024	100.00
2023	FFM Certificate	09/20/2022	12/31/2023	100.00
2023	FFM Certificate	09/20/2022	12/31/2023	100.00
2023	New Mexico SBM	10/04/2021	12/31/2022	100.00

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PREVIOUS 1 2 NEXT

Appointment Info

MY STATUS INFO | SALES STATES & LICENSES | CERTIFICATION INFO | APPLICATION INFO | APPOINTMENT INFO

Search:

Start Date	End Date	Entity ID	Company Name	Company Product	State	Appointment Status
			MOLINA HEALTHCARE OF CALIFORNIA, INC.	ACA	CA	No Appointment Needed
09/15/2019			MOLINA HEALTHCARE OF FLORIDA, INC	ACA	FL	Appointed
09/16/2022			MOLINA HEALTHCARE OF FLORIDA, INC	ACA	FL	Appointed
11/15/2016			MOLINA HEALTHCARE OF FLORIDA, INC	ACA	FL	Appointed
11/02/2019			MOLINA HEALTHCARE OF UTAH INC	ACA	ID	Appointed
			MOLINA HEALTHCARE OF ILLINOIS, INC.	ACA	IL	No Appointment Needed
07/08/2021			MOLINA HEALTHCARE OF KENTUCKY, INC.	ACA	KY	Appointed
04/04/2016			MOLINA HEALTHCARE OF MICHIGAN, INC.	ACA	MI	Appointed

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My Credentials - My Sales States

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My Sales States section displays the full list of states and identifies License status for each.

Active: Molina's records show that you own a valid license in this state.
Inactive: Molina's records show that you own a license, but it is not currently active.

MA Declared States

AZ - Arizona - Active License	NV - Nevada - Active License
ID - Idaho - Active License	OH - Ohio - Active License
IL - Illinois - Active License	SC - South Carolina - Inactive License
KY - Kentucky - Inactive License	TX - Texas - Active License
MI - Michigan - Active License	UT - Utah - Active License
MS - Mississippi - **No License Found**	VA - Virginia - Inactive License
NE - Nebraska - **No License Found**	WA - Washington - Inactive License
NM - New Mexico - Active License	WI - Wisconsin - Active License

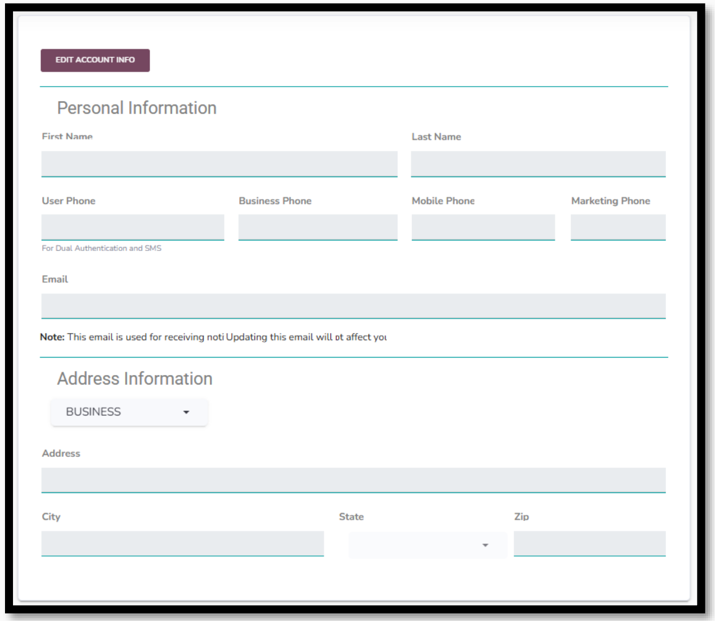
If you do not currently own a license in a state where you intend to sell for Molina, you may still declare sales intent.
However, you will need to acquire a license from that state's department of insurance before reaching ready to sell status in that state.

My Account

Account Info

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 provides a snapshot of the level, upline information, compensation assignment, Sub Type, and Broker Type. This tab will also provide upline history and the time pans reporting to different uplines or Sub Types.

My Hierarchy Info

Broker	NPN	Start Date	End Date	Sales Level	Upline Name	Assigned Comp Name	Sub Type	Broker Type
		03/18/2025	03/18/2025	01 - Agent			Principal - Selling	Field Broker
		03/18/2025		01 - Agent			Dual Assignment	Field Broker
		01/01/2020	03/17/2025	01 - Agent			Licensed Only Agent	Field Broker
		09/21/2016	03/17/2025	01 - Agent			Licensed Only Agent	Field Broker
		01/01/2001	01/01/2001	01 - Agent			Direct	Field Broker
		01/01/2000	01/01/2000	01 - Agent			Direct	Field Broker

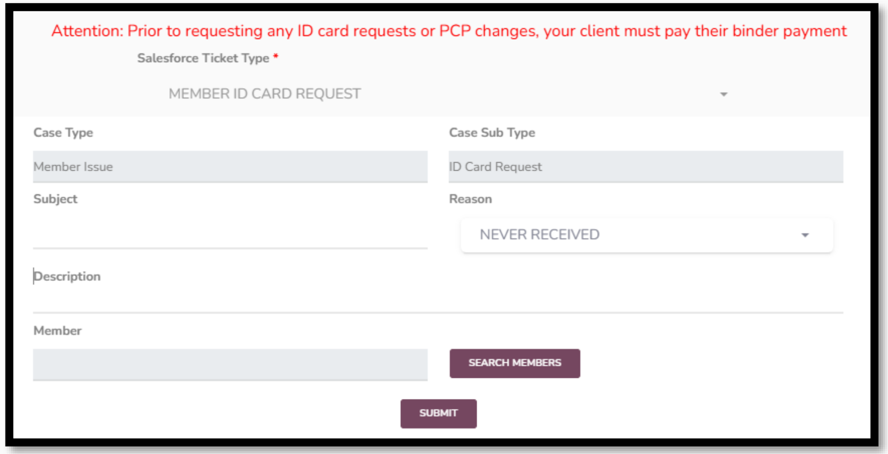
ID Cards & PCP Changes - Overview

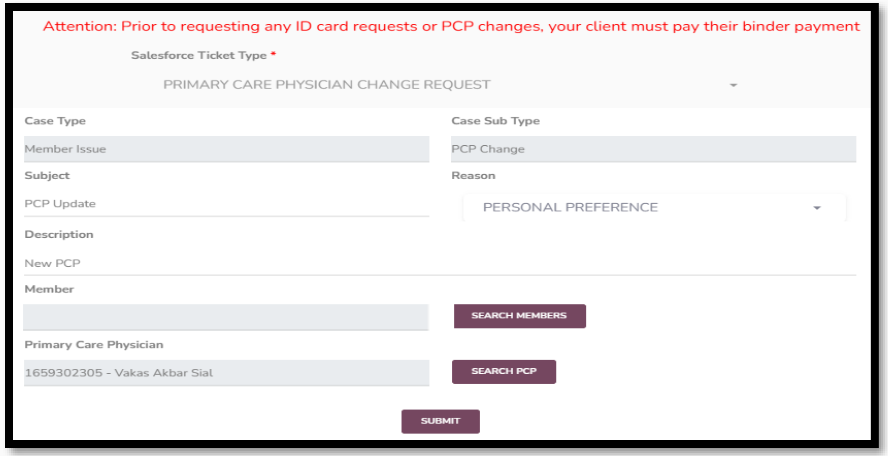
ID Cards & **PCP Changes** section will allow Brokers to submit **Member ID Card Request** and a **Primary Care Physician Change Request** on behalf of a member.

Click **Create Case**, and select Salesforce Ticket Type **Member ID Card Request** Or **Primary Care Physician Change Request.**

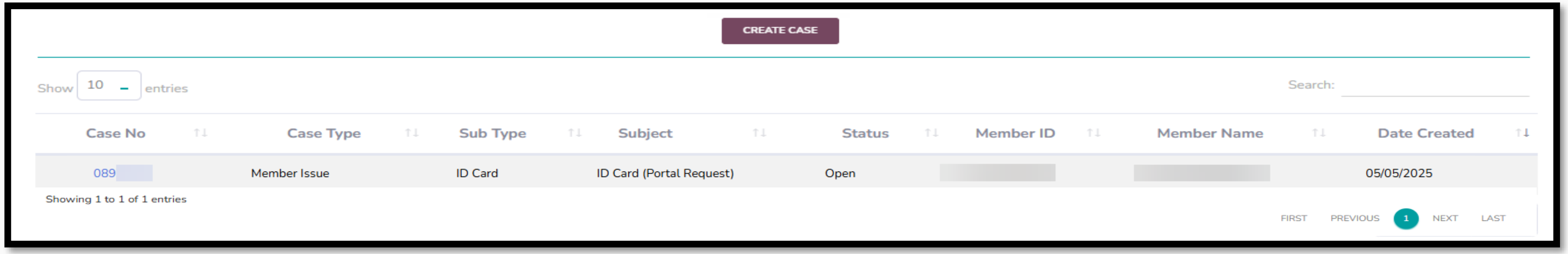
All cases you create will be listed for easy tracking. The Status column will display updates as each case is processed.

The Broker Services team will receive and process these requests within 1-2 business days.





To view Case Details, Status, and Notes, click on the **Case No.**



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ID Cards & PCP Changes - ID Card Request

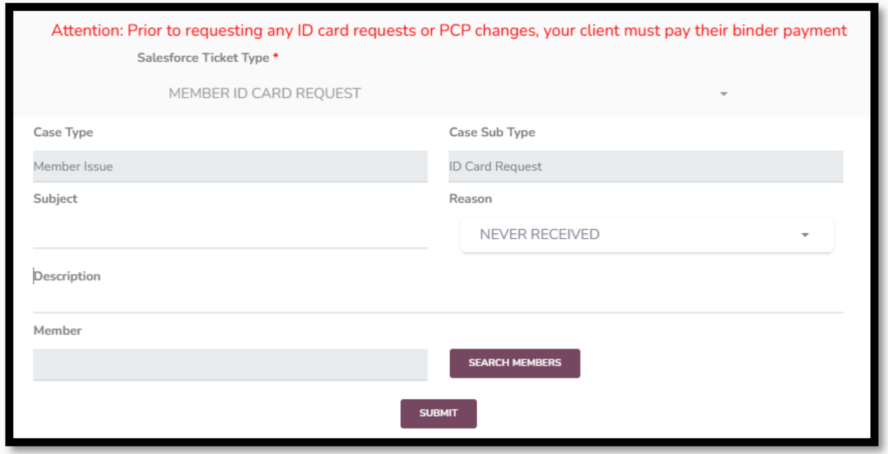
Molina Broker

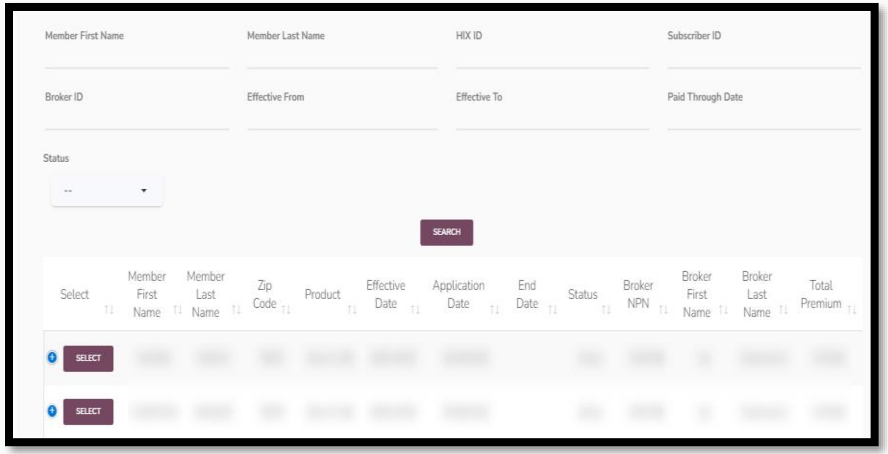
ID Card request**,** on behalf of a member.

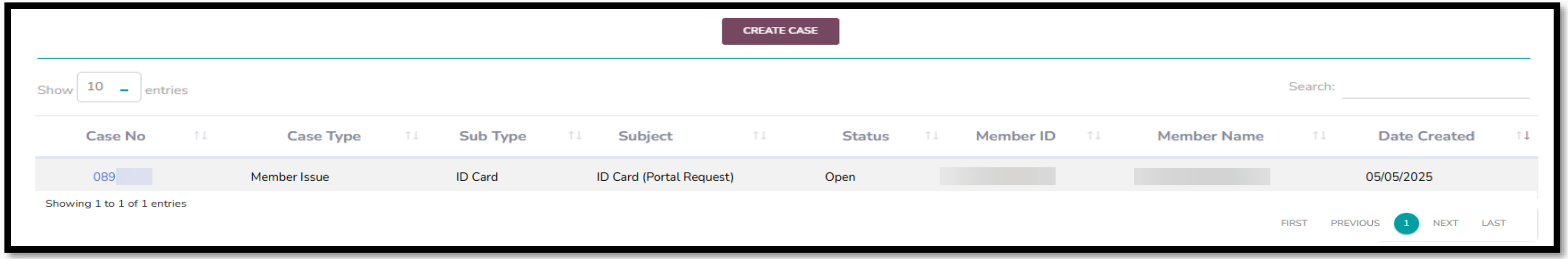
Click **Create Case**, to fill out the request form select a **Reason** and add a short Subject and Description of the request.

Search Members from your Book of Business. **Select** the appropriate member then **Submit** to create a Case.

Once the request is complete, the member will receive their ID card within 7-14 business days.







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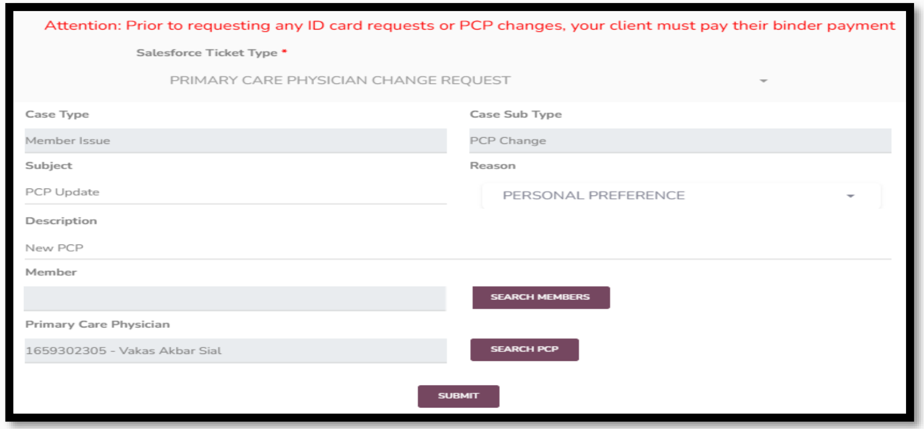
ID Cards & PCP Changes - PCP Change Request

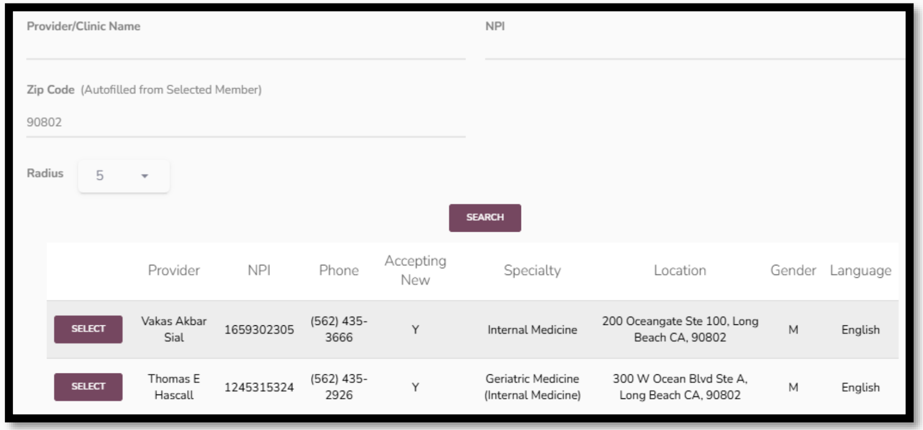
Molina Broker

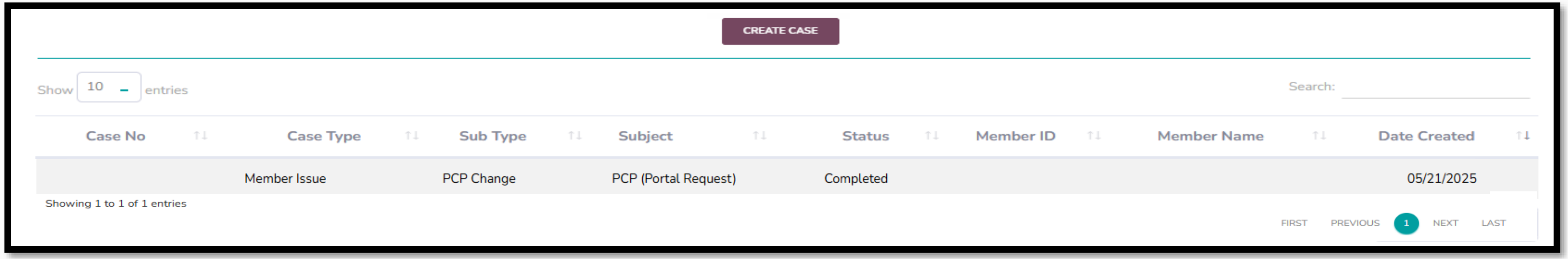
Primary Care Physician Change Request, on behalf of a member.

Click **Create Case**, to fill out the request form select a **Reason** and add a short Subject and Description of the request.
Search Members from your Book of Business.
Search PCP using Provider/Clinic Name, NPI and or Zip Code.
Results shown are from **Molina's Provider Directory**.
Select the appropriate PCP/Clinic Name then **Submit** to create a Case.

Once the request is complete, the member will receive their ID card within 7-14 business days.







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You will be notified with an alert next to **Workflow** menu option Workflows 6

Workflows by default it will be sorted by **Status**
(Pending, Denied, Approved) related to your Ready To Sell status.

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	Principal	Pending			N/A	04/01/2025 04:44 PM PDT
View / Cancel	SBM Certificate	Pending		Molina Admin	N/A	03/24/2025 01:31 PM PDT
View / Cancel	SBM Certificate	Pending		Molina Admin	N/A	03/03/2025 04:40 PM PST
View / Cancel	SBM Certificate	Pending		Molina Admin	N/A	02/17/2025 05:14 PM PST
View / Cancel	E&O Submission	Pending		Molina Admin	N/A	02/12/2025 12:43 PM PST
View / Cancel	E&O Submission	Pending		Molina Admin	N/A	02/12/2025 12:10 PM PST
View	Principal	Denied			N/A	03/18/2025 02:59 PM PDT

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