



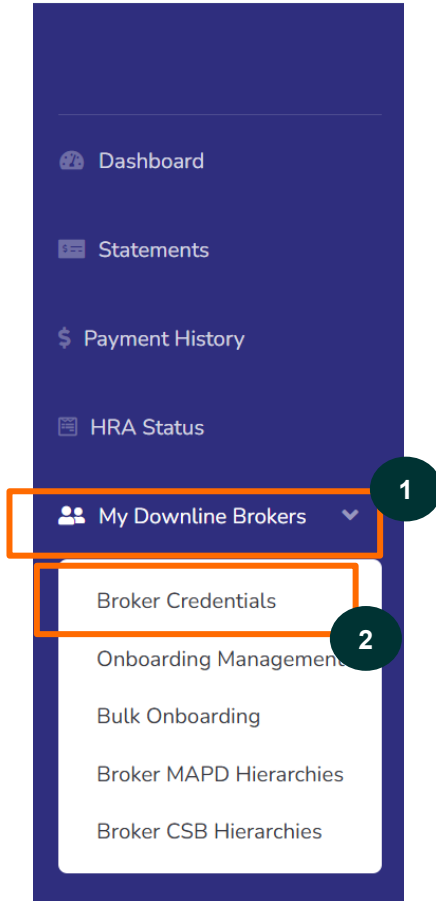
**Agency & External
Broker View:**



Agencies - View Downline Brokers: Broker Search

Let's take a look at how an **agency** can search for a broker and view its broker credentials.

1. Log in to HealthSpringForBrokers (HFB) and click **My Downline Brokers** from the left panel to display additional options.
2. Click **Broker Credentials** to search for brokers.
3. Click **SEARCH** to display the list of brokers in your downline.



Broker Credentials

(MIA) MULTIPLE INSURANCE ASSOCIATE CORPORATION

Rep NPN Rep Name

SEARCH

DOWNLOAD REP STATUS DOWNLOAD LICENSE INFO DOWNLOAD TRAINING INFO DOWNLOAD CONTRACT INFO DOWNLOAD APPOINTMENT INFO

Show entries

Rep Name	Rep Type	Rep NPN	Rep Status	License Status	CSB Recruiter Status	MA Recruiter Status
View Details	External Broker		Active/Certified	2 Active 0 Expired	N/A	N/A

Showing 1 to 1 of 1 entries (1 total records)

Previous **1** Next

Agencies - View Downline Brokers: Broker Credentials

4. Click **View Details** next to a broker's name to see more information about their profile
5. Navigate through the various tabs to view broker details, such as status, licenses, training info, contact info, and appointment info.

The screenshot displays the 'Broker Credentials' interface. On the left is a dark sidebar with navigation links: Dashboard, Statements, Payment History, HRA Status, My Downline Brokers, My Documents, My Credentials, Agency Users, My Account, Workflows, and Scheduled Reports. The main area is titled 'Broker Credentials' and includes search filters for 'Rep NPN' and 'Rep Name', a 'SEARCH' button, and download buttons for 'Rep Status', 'License Info', 'Training Info', and 'Appointment Info'. A table lists brokers with columns for Rep Name, Rep Type, Rep NPN, Rep Status, License Status, CSB Recruiter Status, and MAPD Recruiter Status. The first broker, Kendia Reyes, is highlighted with a green circle and the number 4, with a 'View Details' button next to her name. Below the table, a modal window for 'KENDIA REYES' is open, showing tabs for 'My Status Info', 'Sales States & Licenses', 'Training Info', 'Contract Info', and 'Appointment Info'. The 'My Status Info' tab is selected and highlighted with a green circle and the number 5. It shows a table with columns 'LOB' and 'Rep Status', containing two entries: SHL (Active/Certified) and MGAP (Active/Certified). At the bottom of the modal, it says 'Showing 1 to 2 of 2 entries' and includes pagination controls (First, Previous, 1, Next, Last).

Rep Name	Rep Type	Rep NPN	Rep Status	License Status	CSB Recruiter Status	MAPD Recruiter Status
Kendia Reyes	External Broker		Active/Certified	4 Active 0 Expired	Active	N/A
	External Broker		Active/Certified	3 Active 0 Expired	Active	N/A
	External Broker		Active/Certified	3 Active 0 Expired	Active	N/A
	External Broker		Active/Certified	2 Active 0 Expired	Active	N/A
	External Broker		Active/Certified	2 Active 0 Expired	Active	N/A
	Agency		Active/Certified	1 Active 0 Expired	Active	N/A

LOB	Rep Status
SHL	Active/Certified
MGAP	Active/Certified

Agencies - View Downline Brokers: Broker Hierarchies

Let's take a look at how an agency can view broker hierarchies.

1. Log in to HFB, select **Contracting**, and click **My Downline Brokers** from the left panel. The sub-section will expand.
2. Click **Broker Hierarchies** to navigate to the **Broker Hierarchies** screen.
3. Click **SEARCH** to view the broker hierarchies.

The screenshot shows the HFB interface. On the left, a dark blue sidebar contains a menu with 'My Downline Brokers' highlighted by a red box and a green circle with the number 1. Below it, the expanded menu shows 'Broker CSB Hierarchies' highlighted by a red box and a green circle with the number 2. The main content area is titled 'Broker CSB Hierarchies' and features a search form with fields for Rep Name, Rep NPN, SubType, Sales Level, Next Name, Next NPN, Writing ID, and Next Writing ID. A red box and green circle with the number 3 highlight the 'SEARCH' button. Below the search form, there is a table with 12 columns: Rep Name, NPN, Writing ID, Company, Distribution, Market Code, Start Date, End Date, Sales Level, Next Upline, Assigned Comp Name, Sub Type, and Rep Type. The table contains two entries. At the bottom right, there is a pagination control showing 'Showing 1 to 2 of 2 entries' and a set of buttons: First, Previous, 1 (highlighted), Next, Last.

Broker CSB Hierarchies

Rep Name Rep NPN SubType

Sales Level Next Name Next NPN

Writing ID Next Writing ID

Show entries

SEARCH **DOWNLOAD**

Search:

Rep Name	NPN	Writing ID	Company	Distribution	Market Code	Start Date	End Date	Sales Level	Next Upline	Assigned Comp Name	Sub Type	Rep Type
					CBCSO	01/02/2025		01 - LOA		A	Downline Only	External Broker
					CBCSO	11/22/2024		01 - LOA			Downline Only	External Broker

Showing 1 to 2 of 2 entries

First Previous **1** Next Last

Agencies - View Downline Brokers: Broker Hierarchies

4. A list of brokers will open with the relevant hierarchy details.

Fields in the Broker Hierarchy search page:

- **Rep Name:** Broker/Agency's name
- **NPN:** National Producer Number
- **Writing ID:** If broker sells for HSB, it's their HSB writing ID that associates the broker to proper charter
- **Company:** A numeric identifier used by HSB to refer to umbrella companies or "charters" containing product offerings for brokers to sell.
- **Market Code:** A numeric identifier internal to HCSC that separates brokers into groups or "distributions" based on their pay structure.
- **Start Date:** The date when a broker/agency is assigned to a hierarchy
- **End Date:** The date when a broker/agency is leaves a hierarchy
- **Sales Level:** Broker/Agency's sales level in the system
- **Next Upline:** The agency broker reports to
- **Assigned Comp Name:** Is where commissions are assigned
- **Sub Type:** Denotes how brokers are paid
- **Rep Type:** Explains the type of broker they are (external, telesales, internal, etc.)

Show entries

SEARCHDOWNLOAD

Search:

Rep Name	NPN	Writing ID	Company	Distribution	Market Code	Start Date	End Date	Sales Level	Next Upline	Assigned Comp Name	Sub Type	Rep Type
					CBCSO	01/02/2025		0				External Broker
					CBCSO	11/22/2024						External Broker

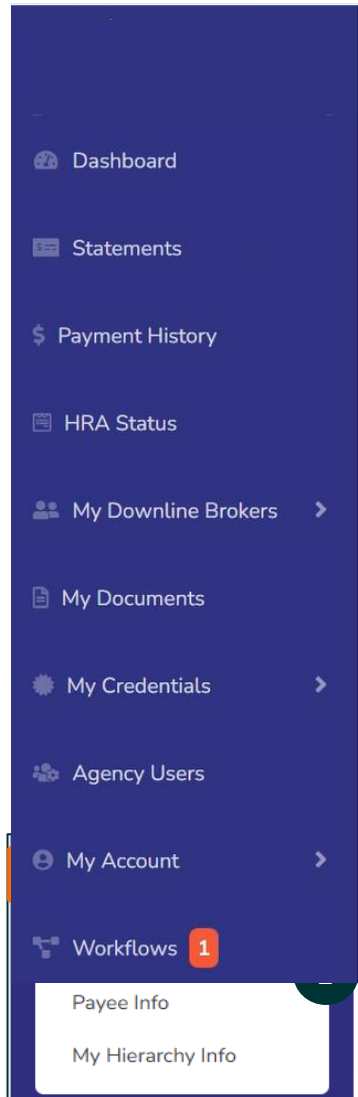
Showing 1 to 2 of 2 entries


FirstPrevious1NextLast

Broker View – Demographic Information

Let's look at how a broker can view their demographic information.

1. Log in to HFB, select **Contracting**, and click **My Account** from the left panel to expand the sub-section.
2. Click **Account Info** to view the existing personal and address information associated with the account.



Account Info 1 A ROSE JR 

[EDIT ACCOUNT INFO](#)

Personal Information

First Name Last Name

User Phone Business Phone Mobile Phone

For Dual Authentication and SMS

Marketing Phone

Email

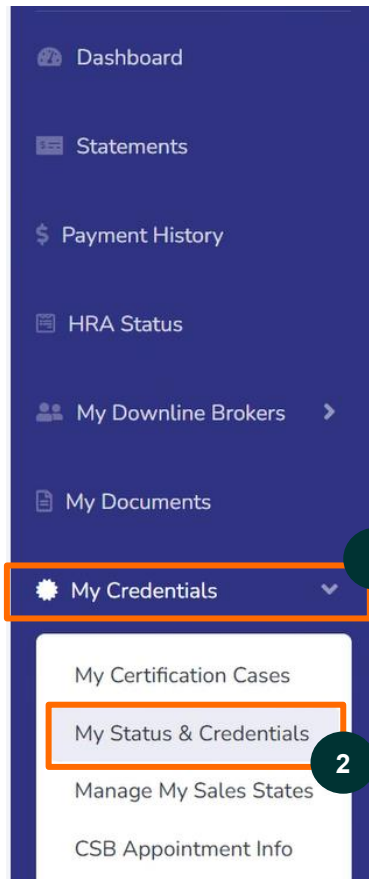
Note: This email is used for receiving notification emails from CignaUAT. Updating this email will not affect your portal login credentials.

Address Information

Broker View – Broker Credentials

Let's look at how a broker can view their credentials.

1. Log in to HFB, select **Contracting**, and click **My Account** from the left panel to expand the sub-section.
2. Click **My Status & Credentials** and navigate through the various tabs to view broker details, such as status, licenses, training info, contact info, and appointment info.



My Status & Credentials

Chad Wood

My Status Info Sales States & Licenses Training Info Contract 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
MGAP	TX	Yes		General Lines Agncy/Agnt		07-28-2021	09-30-2027	Active	Active/Certified
SHL	TX	Yes		General Lines Agncy/Agnt		07-28-2021	09-30-2027	Active	Active/Certified

Showing 1 to 2 of 2 entries

Previous 1 Next

Broker View – My Downline Brokers - Search

Let's take a look at how to search for a broker in your hierarchy

1. Log in to HFB and click **My Downline Brokers** from the left panel to display additional options.
2. Click **Broker Credentials** to search for brokers.
3. Click **SEARCH** to display the list of brokers in your downline.

Broker Credentials

Rep NPN Rep Name

SEARCH

DOWNLOAD REP STATUS DOWNLOAD LICENSE INFO DOWNLOAD TRAINING INFO DOWNLOAD APPOINTMENT INFO

How entries

Rep Name	Rep Type	Rep NPN	Rep Status	License Status	CSB Recruiter Status	MAPD Recruiter Status
No data available in table						

Showing 0 to 0 of 0 entries

Previous Next

Broker View – My Account – My HSB Hierarchy Info

Brokers can only see their direct up-line & downline

- 1. Log in to HFB and click **My Account** from the left panel to display additional options.
- 2. Click **My HSB Hierarchy Info** view broker hierarchy info.

Dashboard

Statements

Payment History

HRA Status

My Downline Brokers

My Documents

My Credentials

Agency Users

My Account

Account Info

Payee Info

My MAPD Hierarchy Info

My CSB Hierarchy Info

My CSB Hierarchy Info

CHANGE CSB

LOB	Rep	NPN	Writing ID	Company	Market Code	Start Date	End Date	Sales Level	Upline Name	Assigned Comp Name	Sub Type	Ad l
MSUP			.1271	36	CBCSO	07/07/2025		50 - AGA			Downline Only	0 r
									AGENCY			
SHL			.1271	12	CBCSO	02/06/2025		50 - AGA			Downline Only	0 r
MSUP			1271	60	CBCSO	02/06/2025		50 - AGA			Downline Only	0 r
MSUP			1271	63	CBCSO	02/06/2025		50 - AGA			Downline Only	0 r