Getting Started with Producer Onboarding

ESSENCE HEALTHCARE®

Let's Medicare Together®

This guide provides step-by-step instructions to help you get started with Essence. It will walk you through verifying your personal information, setting up your banking details, completing all required training, signing the Producer Agreement, and initiating your background check.

Please note that some steps may differ between different agents. It will be noted in each section in red.

Last updated July, 2026

Table of Contents

Users will receive an email invitation from Producer Support to log in and begin the setup process outlined below.

Step 1:

Set up your multi-factor authentication (MFA).

Choose Your Authentication Method

Step 1

OPTION 1

Salesforce Authenticator
(Recommended)

- Best for a quick, one-tap login. Use this if you are setting up an authenticator for the first time.
- Provides one-tap “Approve” or “Deny” push notifications directly to your phone.

CONTINUE TO THE NEXT PAGE

OPTION 2

Other Authenticator App
(Google, Microsoft, Authy)

- Best for keeping all your codes in one app. Use this if you already use an authenticator like Google, Microsoft, or Authy.
- Requires you to manually open the app and type a 6-digit code.

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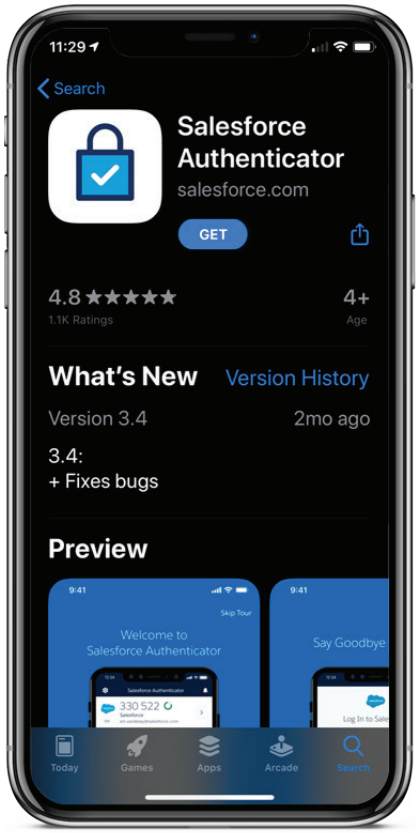
Using Salesforce Authenticator

Salesforce's Authenticator app is a multi-factor authentication (MFA) tool that adds an extra layer of security to the producer portal login. After entering your username and password, you approve the login from your mobile device. First, the Salesforce App needs to be registered and connected to your account.

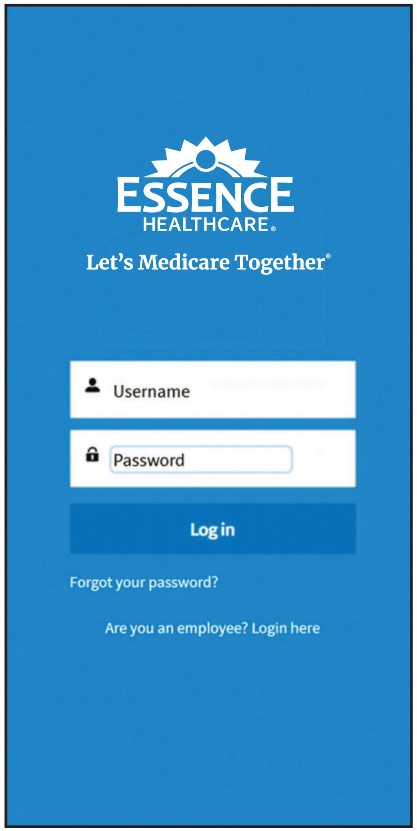
1

Install Salesforce Authenticator on your mobile device. It's available from the Apple App Store or Google Play.



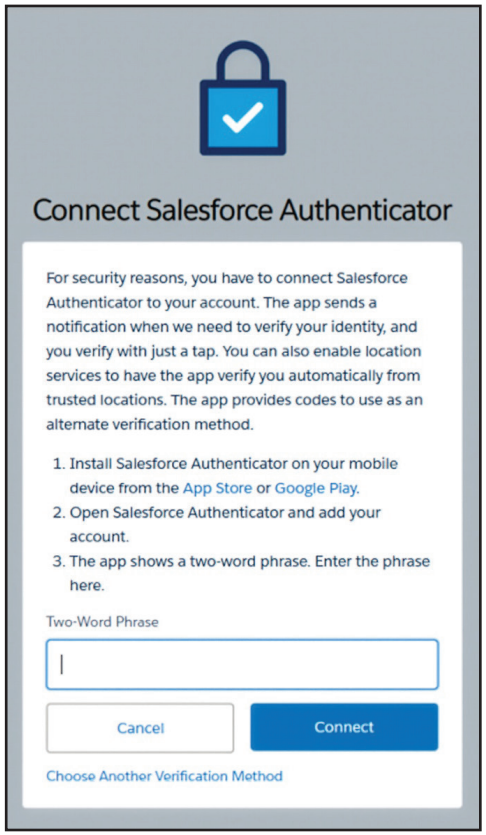
2

On your computer, log in to your producer portal account. You may be prompted to verify your identity with a one-time passcode via email or text.



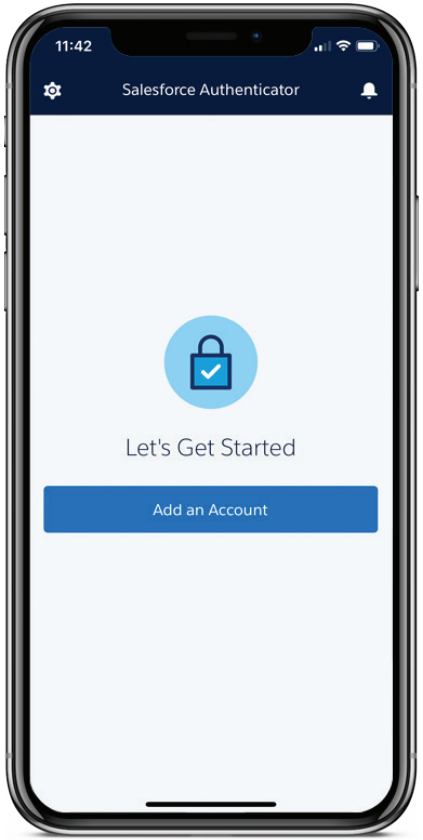
3

Look for this screen to begin connecting your app.



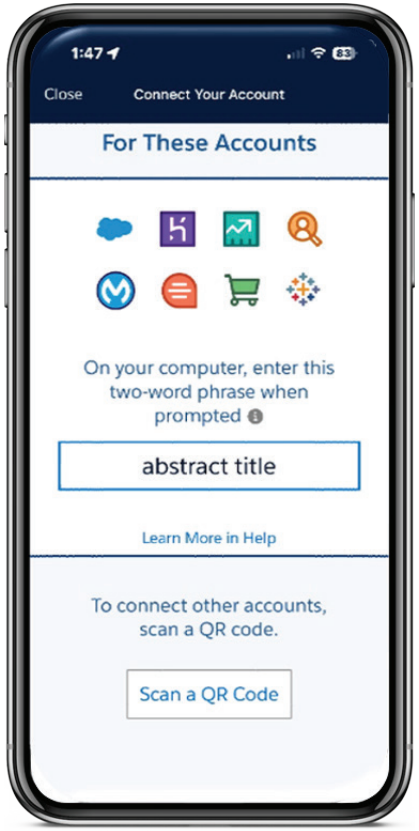
4

On your mobile device, open Salesforce Authenticator and tap **Add an Account.**



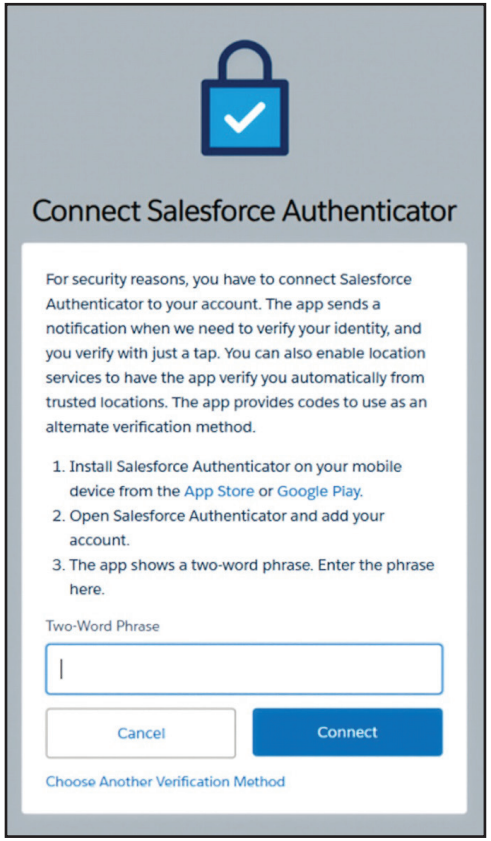
5

The app displays a two-word phrase.



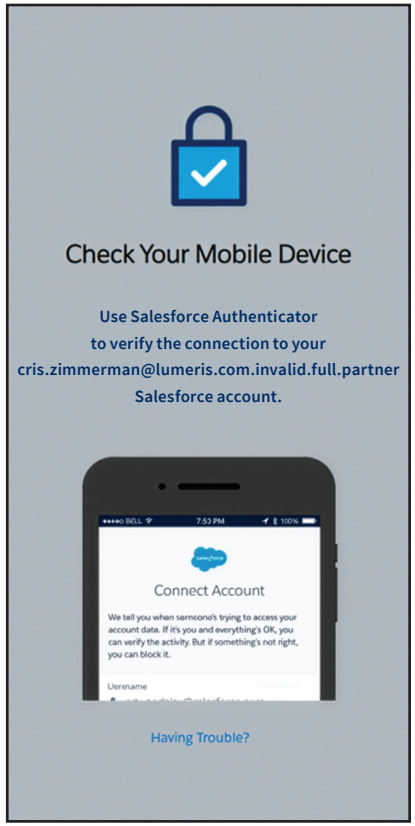
6

On your computer, enter the phrase in the Two-Word Phrase field. Then click **Connect.**



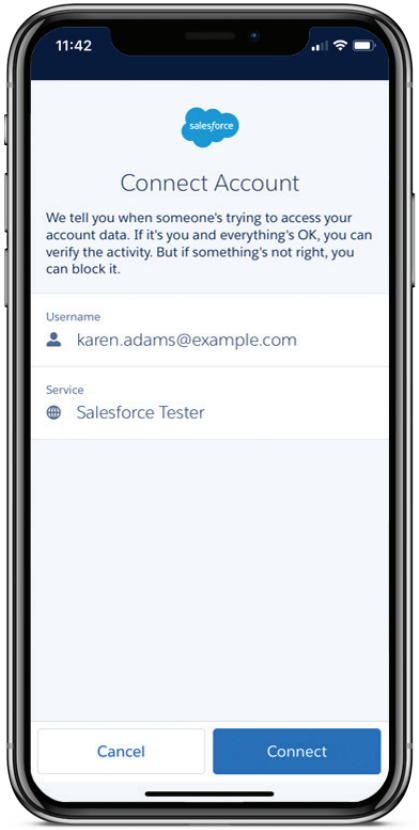
7

Salesforce Authenticator is connected to your account. You're prompted to confirm the connection details in the app.



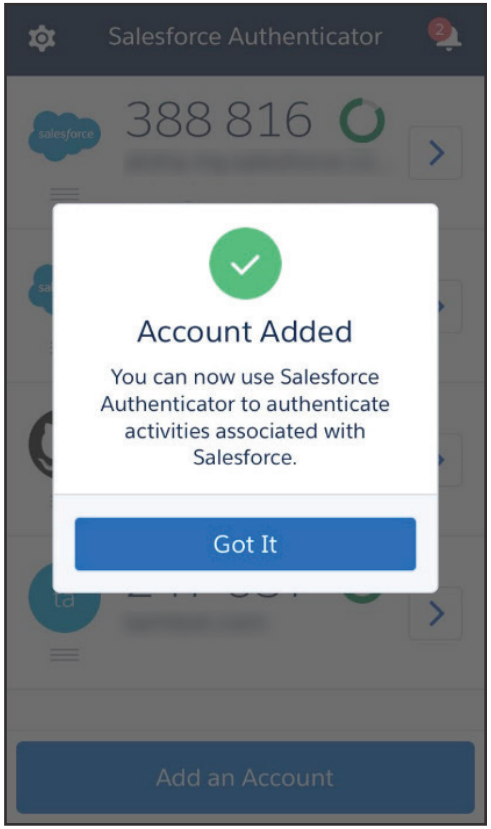
8

In Salesforce Authenticator, verify that the connection details are correct, then tap **Connect.**



9

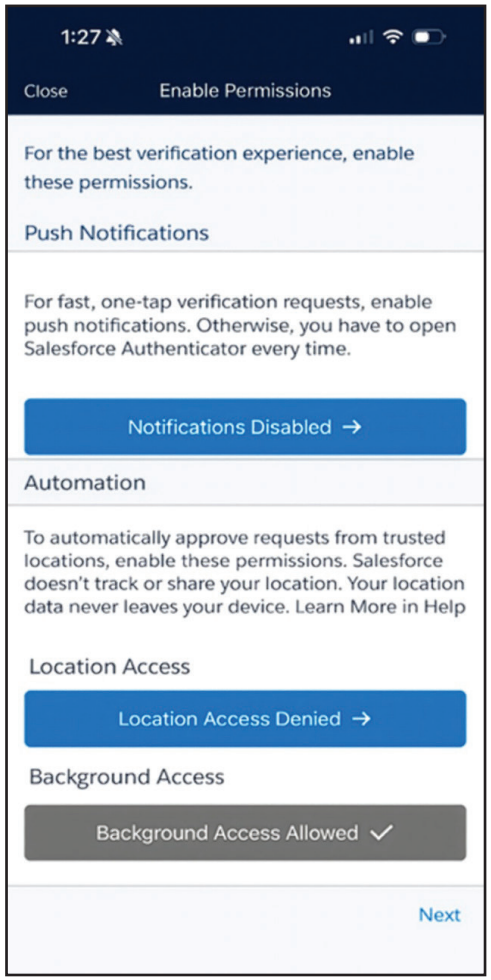
And that's it! You've successfully connected Salesforce Authenticator to your account.



10

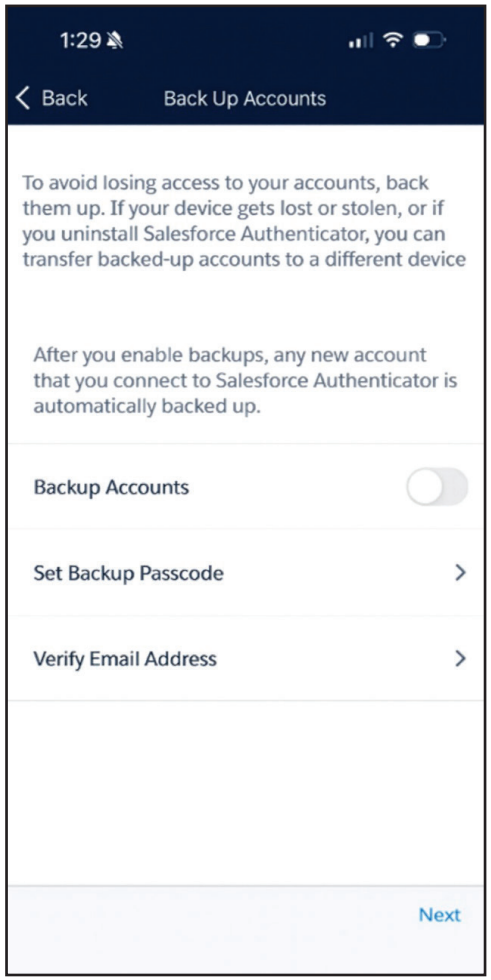
After clicking **Got it,** enable notifications by clicking on the **Notifications Disabled** button.

Location Access is optional.



11

Once, notifications are enabled, it is recommended to back up your accounts and complete that set up.



Logging in to the Producer Portal using Salesforce Authenticator after Initial Set-Up

Step 1

Username Format: name@emailprovider.com.essence

1

On the login screen, enter your username and password, as usual.

2

The producer portal prompts you to use Salesforce Authenticator to verify your identity.

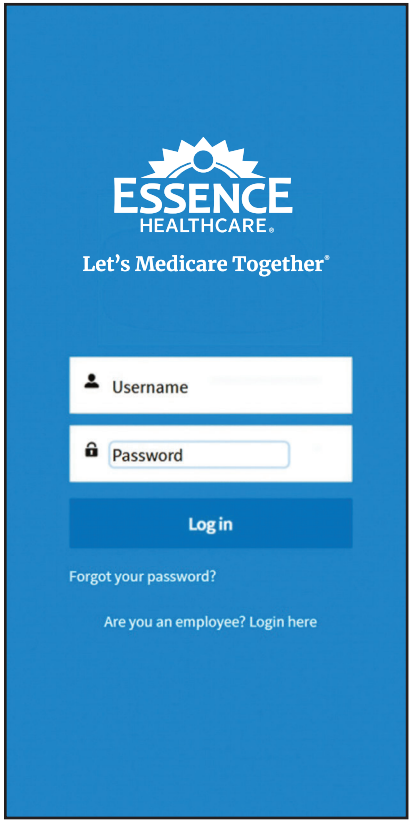
3

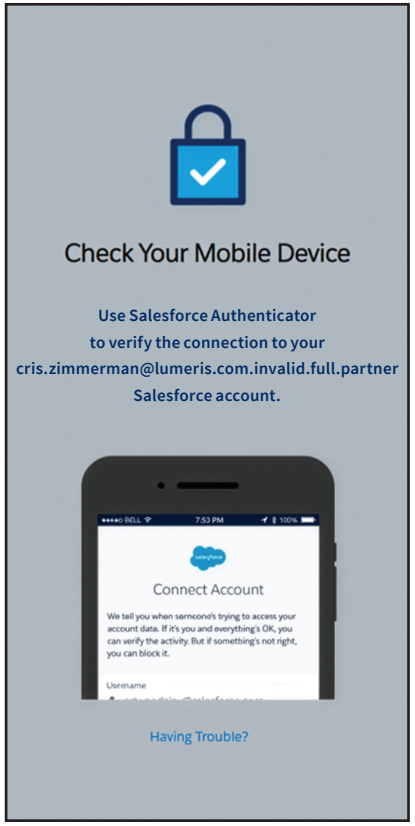
On your mobile device, respond to the push notification to open Salesforce Authenticator.

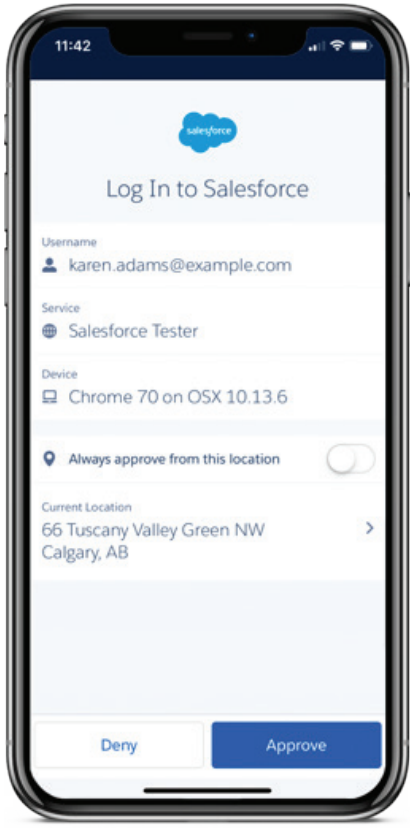
4

In Salesforce Authenticator, verify that the login request is from you, then tap **Approve.**

You're successfully logged in to your account.







Using A Third-Party Authenticator (Microsoft Authenticator, Google, Authy)

Use this option if you have already installed and use a third-party authenticator such as Microsoft Authenticator or Google Authenticator. After entering your username and password, you approve the login from your mobile device. First, the third-party app needs to be registered and connected to your account.

1

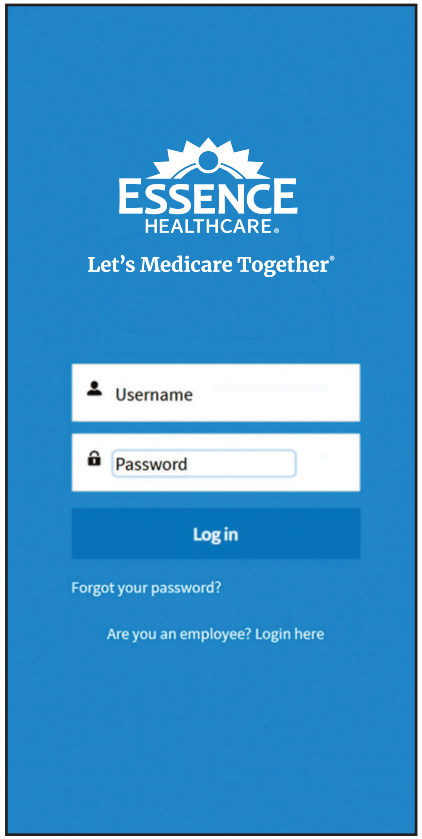
Use an already installed third-party authenticator on your mobile device. Apps are available from the Apple App Store or Google Play.

Download on the App Store

GET IT ON Google Play

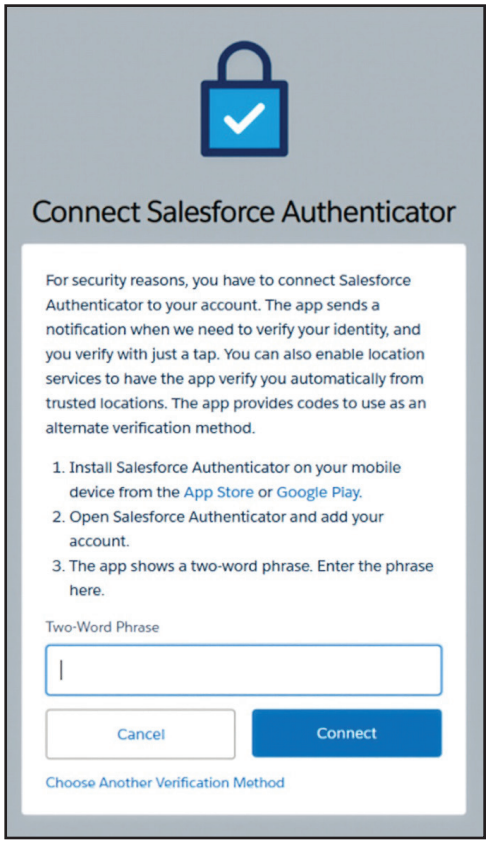
2

On your computer, log in to your account.



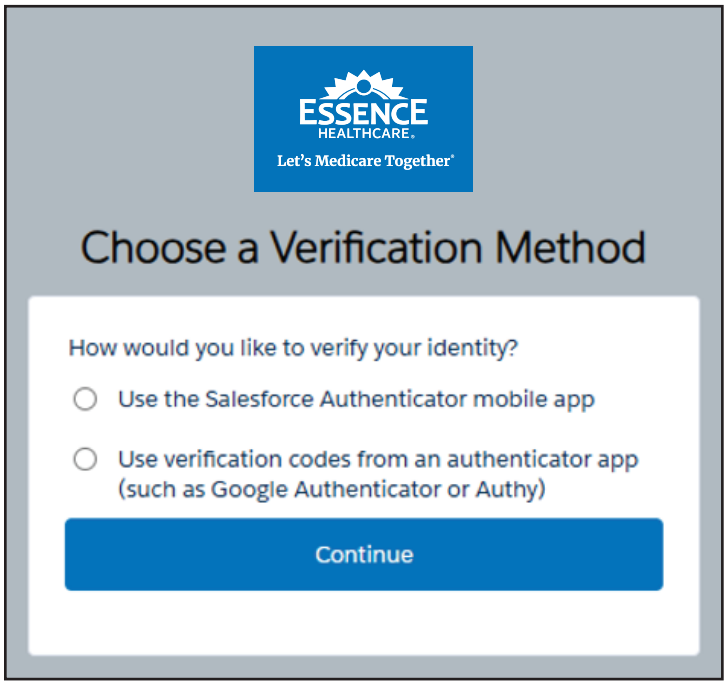
3

Select **Choose Another Verification Method** underneath the option to enter in the Two-Word Phrase.



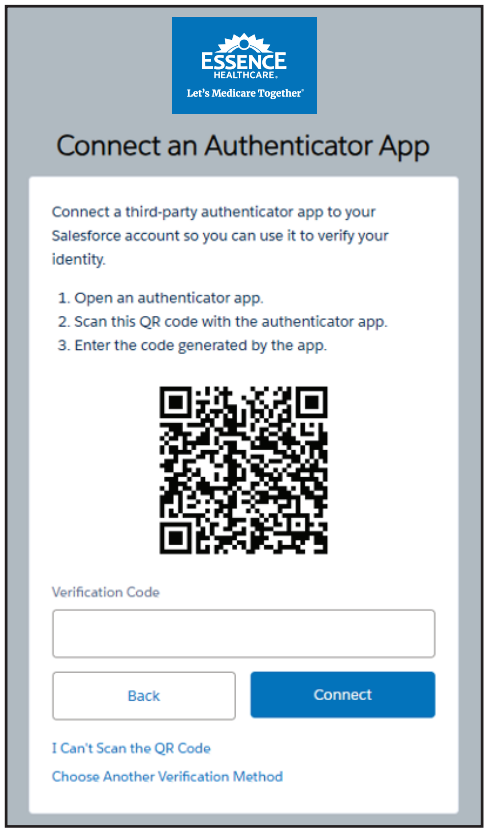
4

Select **Use verification codes from an authenticator app (such as Google Authenticator or Authy).** Click **Continue.**



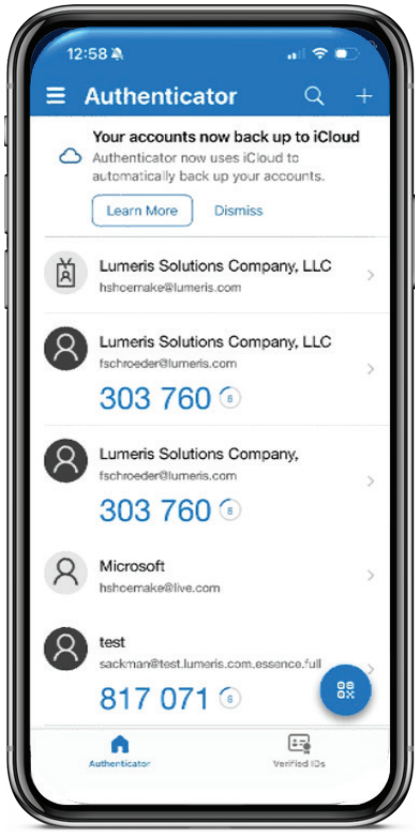
5

The Connect an Authenticator app screen displays.



6

On your mobile device, open your authenticator app and select the option to scan a QR code.



7

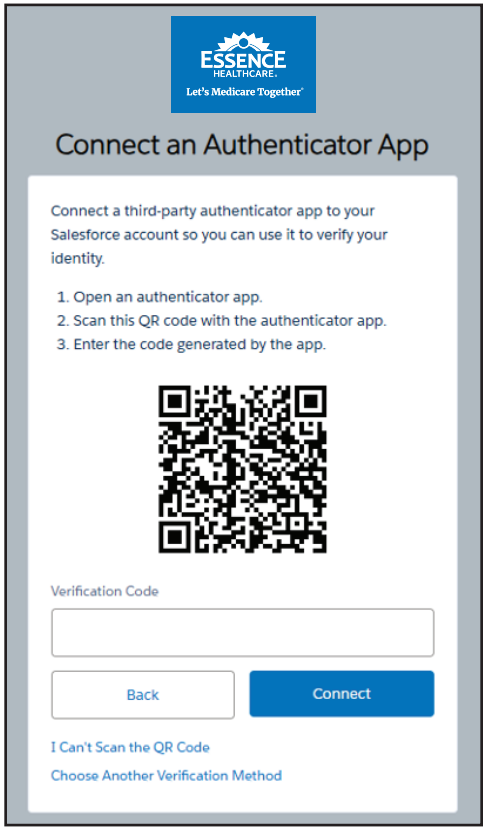
Use the authenticator app to scan the QR barcode that's displayed on your computer.

8

The authenticator app is now connected to your account. The app automatically starts generating time-based one-time passcodes. (make sure the username matches)

9

On your computer, enter the code generated by the authenticator app in the Verification Code field. Then click **Connect.**

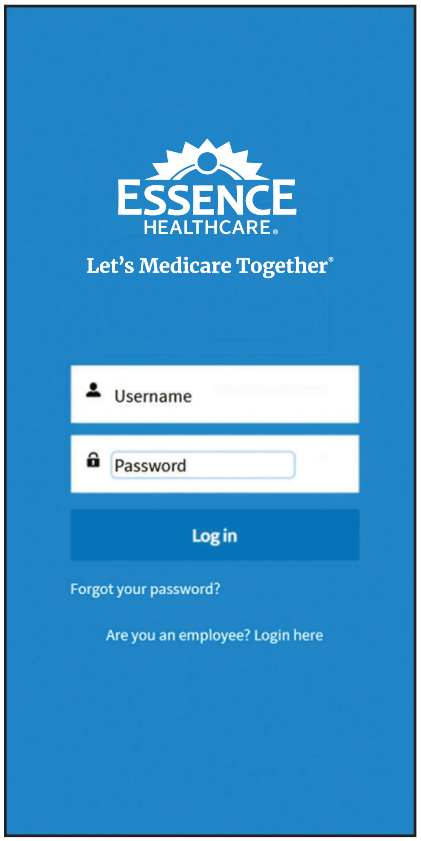


Logging in to the Producer Portal using a Third-Party Authenticator after Initial Set-Up

Step 1

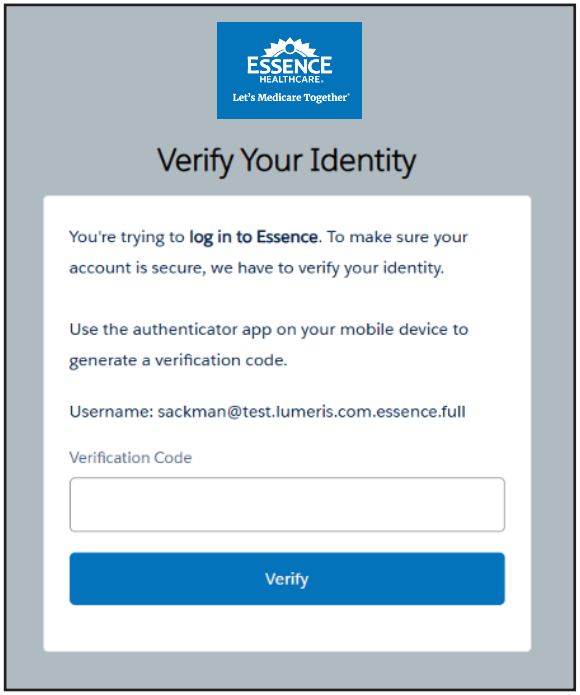
1

On the login screen, enter your username and password.



2

You will be prompted to enter a code from your authenticator app to verify your identity.



3

On your mobile device, open your authenticator app to get a time-based one-time passcode. Enter the code into the Verification Code box on your computer.

Step 2:

Verify your personal and business information.

Licensed Only Agent and General Agent Onboarding Steps

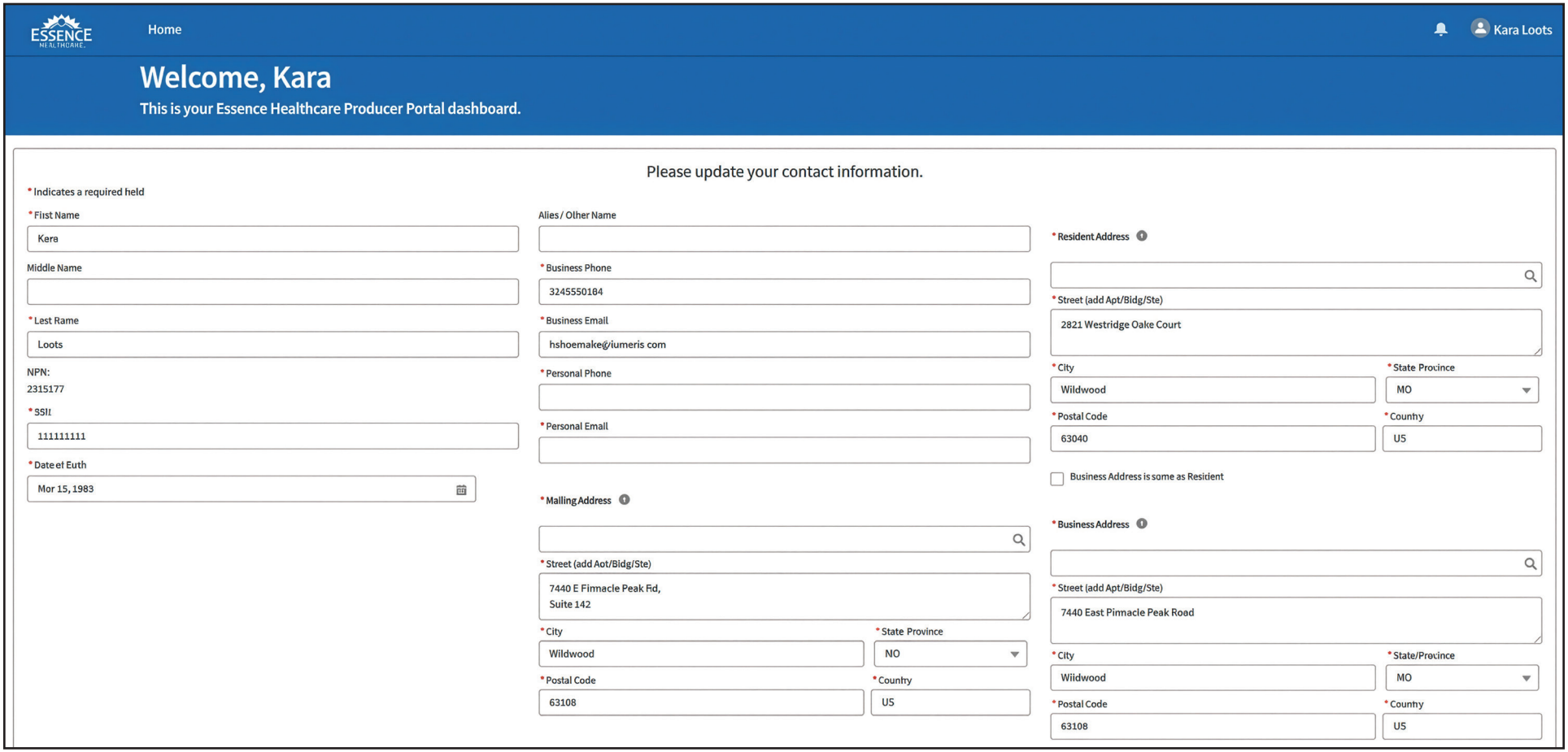
Step 2

General Agent: Anyone with a NPN and contracted with Essence to sell our plan.

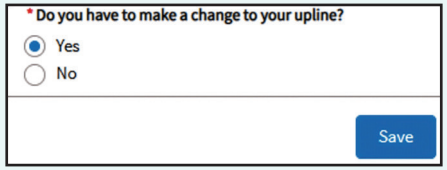
Licensed Only Agent (LOA): A licensed agent with commissions that go directly to the agency.

Please confirm that all your contact information is accurate. All fields marked with a red asterisk are required to be filled out before moving on.

The option to make any changes to your upline is in the bottom left corner.

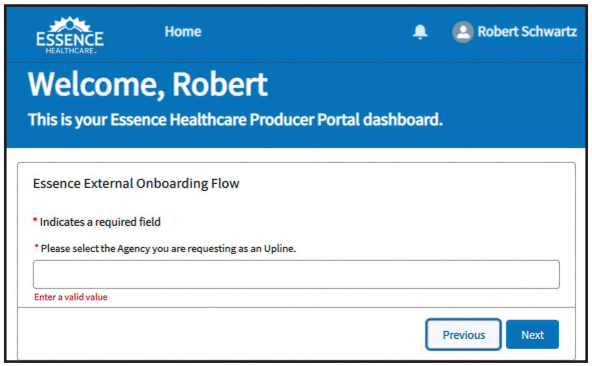


Do you need to make changes to your upline? **Yes**



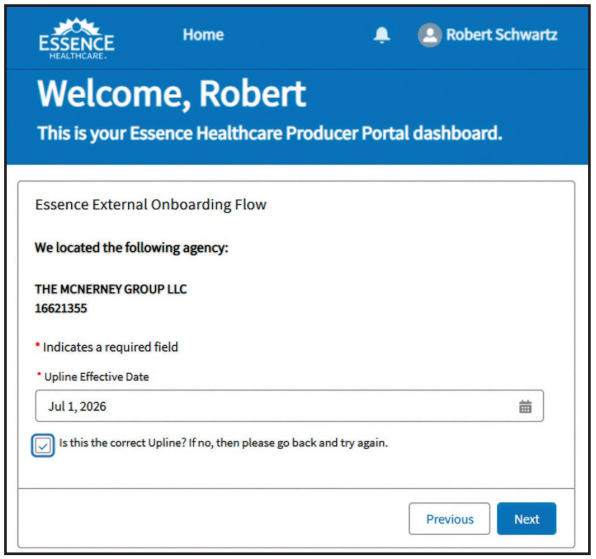
1

Click **Next** after selecting the upline agency from the drop-down list.



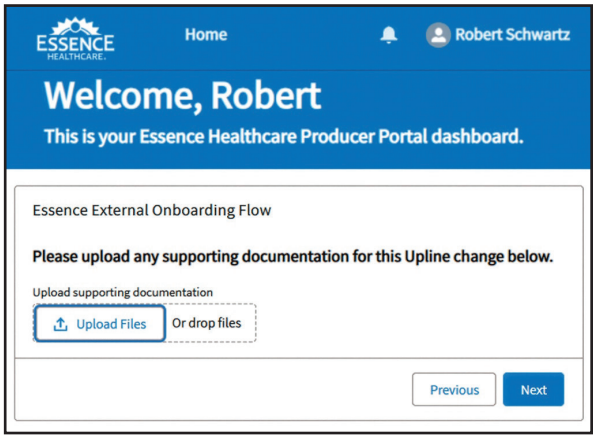
2

Enter the effective date of the upline and click **Next.**

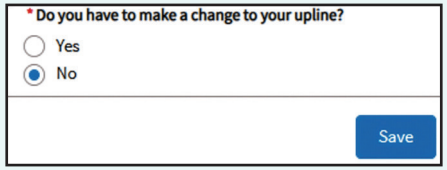


3

Upload your current upline release form in the Upload files and click **Next.**



Do you need to make changes to your upline? **No**

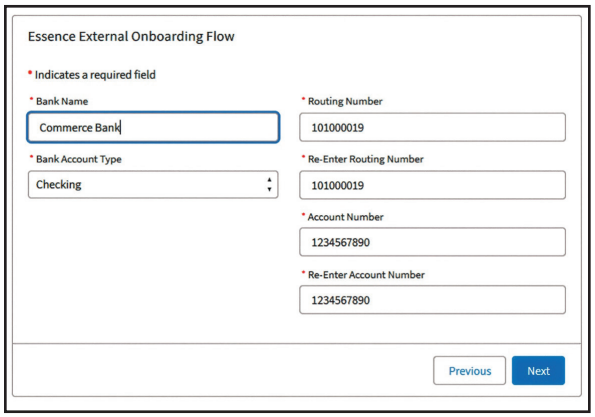


IMPORTANT! The banking steps are for General Agents **ONLY.** If you are a Licensed Only Agent, you will not have these steps and will move on to the Checkr background check steps **here.**

1

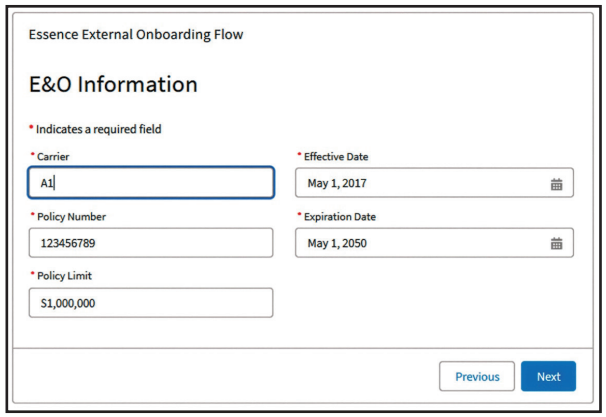
If **No,** the screen will move you to the screen where you can enter your banking information.

Click **Next** to move to the next screen.



2

Enter in your E&O information, then click **Next.**

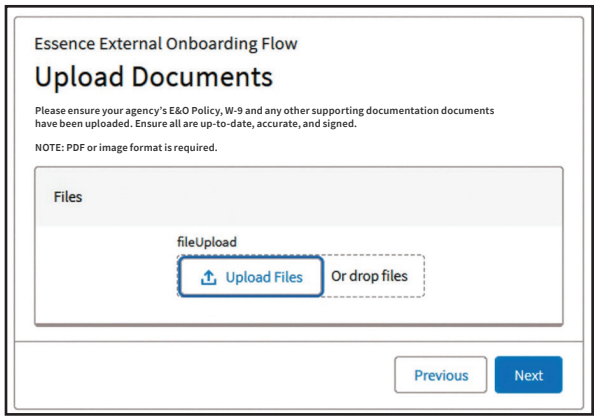


3

This page allows you to upload any supporting documents such as your E&O policy or W-9.

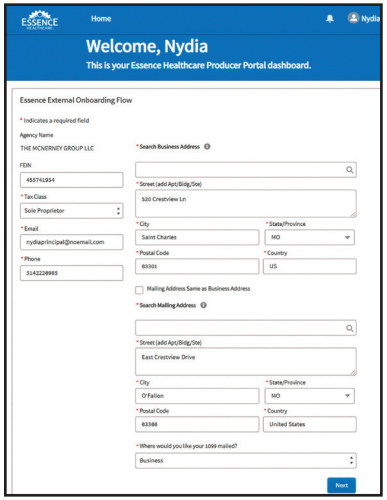
NOTE: the document needs to be in PDF or Image format.

Click **Next** after completion.



Principal Agent Onboarding Steps

The principal agent is responsible for onboarding the agency while also completing their own onboarding as an agent.



1

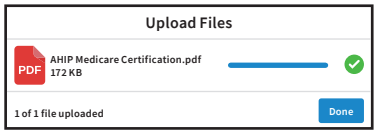
If you are a principal agent, you will verify the agency information first.

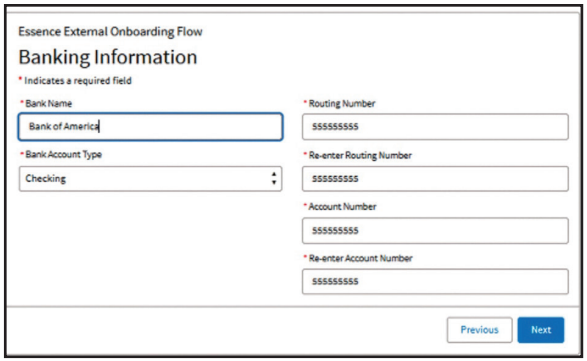
Click **Next** after verifying all information is accurate.

The **TAX class is a drop-down box** that allows you to select different options pertaining to your agency's classification.

The **1099 drop down box** allows you to select if you want your 1099 mailed to the agency's business address or the mailing address provided.

Once the green check is displayed, you click **Done.**

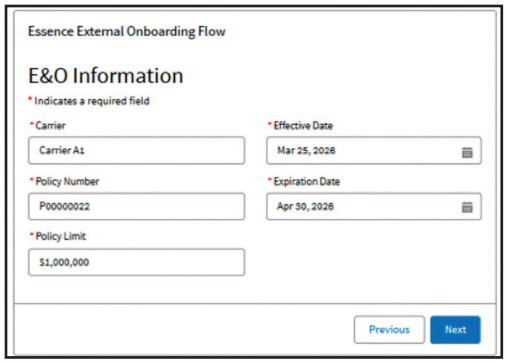




2

Verify the banking information for the agency is accurate. You will have the option to update your banking information on the next page.

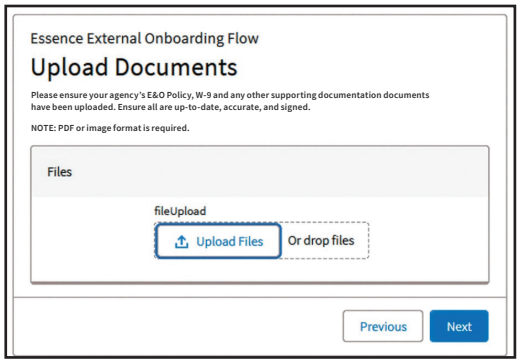
Click **Next** when all information is correct.



3

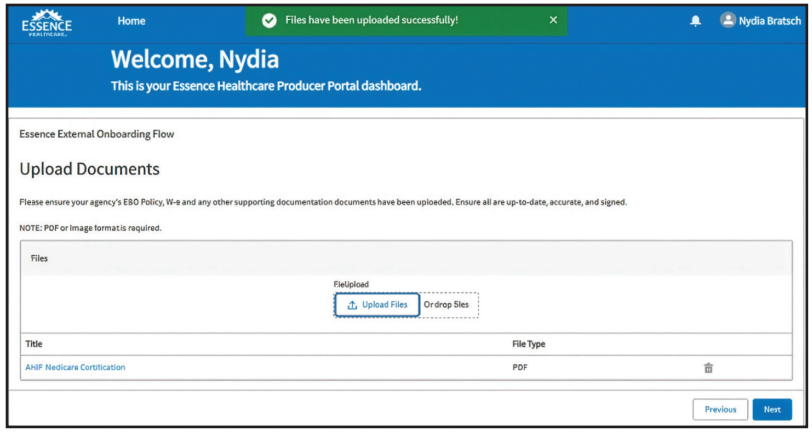
Verify the E&O information is correct. Click **Next.**

NOTE: the policy limit field must have a minimum of one million.



4

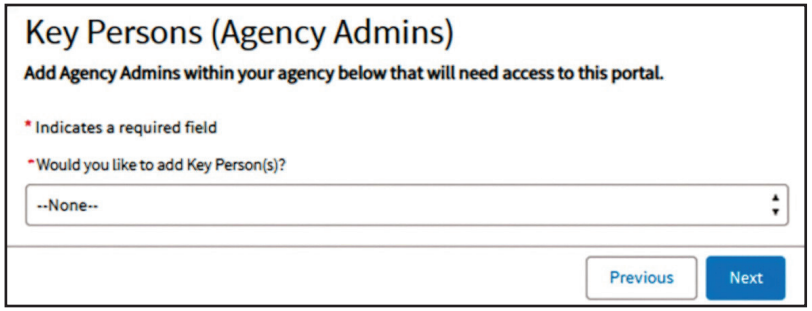
This step allows you to add any supporting documentation for the agency such as the E&O policy or W-9's. Click **Upload Files** to attach documentation.



5

Your document will display under **Upload Files** section, and a green banner will display on top saying **files have been uploaded successfully.** If you need to delete the file, click on the image of the **trashcan.**

Click **Next** after all files have been uploaded.

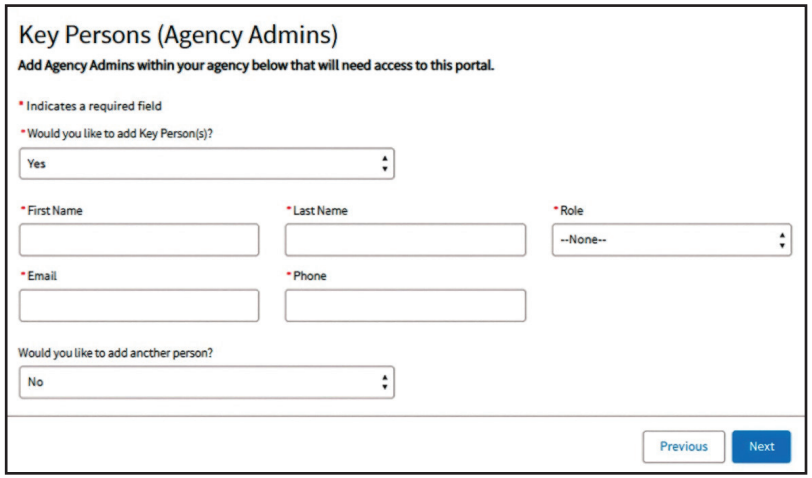


6

The next step is to identify any key persons (agency administrators) that need access to the portal.

Use the drop-down box to answer **Yes** or **No.**

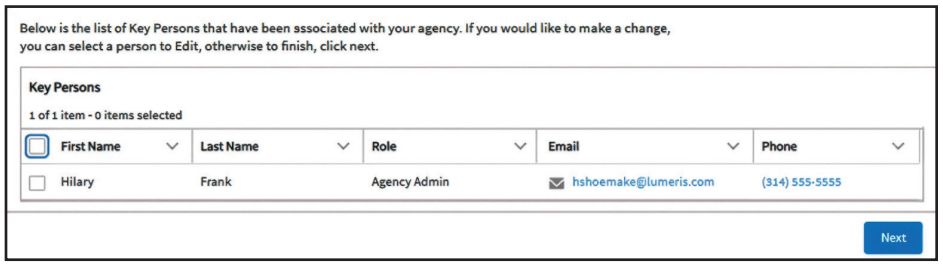
NOTE: An agency admin is someone that is typically unlicensed that assists the agents on behalf of the principal agent.



7

If **Yes,** enter in the information for admin. You have the option to add additional administrators on this page.

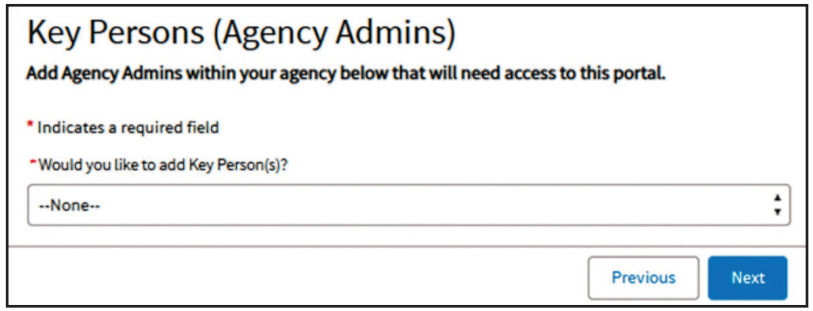
Click **Next** when finished adding all administrators.



8

If you need to edit the administrator's information you can click the box next to the key persons name and make any changes.

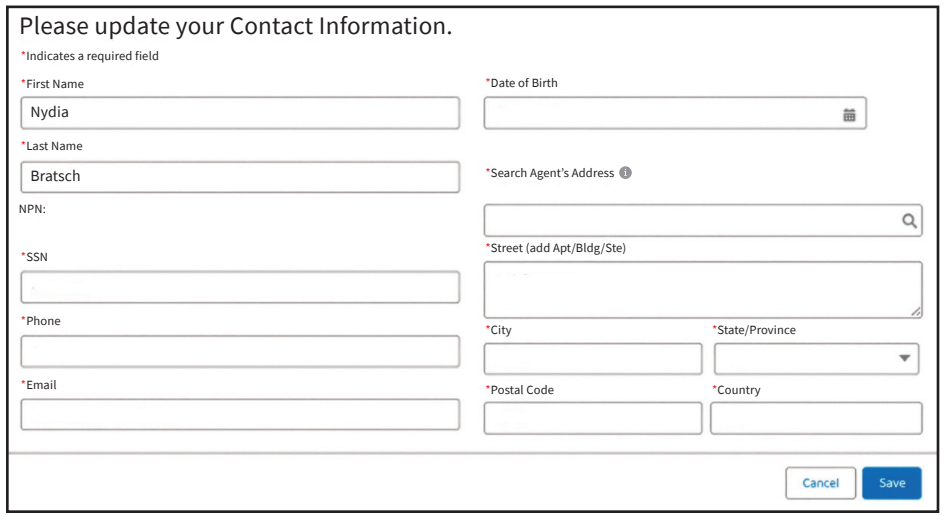
Once, everything is correct click **Next.**



9

If **No,** click **Next.**

NOTE: An agent administrator may already be assigned. If you know this, select **No** and click **Next.** You will be able to review the key person information on the next page.



10

Once the key person information is completed, you have completed the agency demographics and now need to verify your own personal information.

Click **Save** when all information is verified.

NOTE: Adding a key person will generate an invite to the producer portal on behalf of the agency. If a key person is a licensed agent with Essence, they will receive an invite to onboard as an agent in addition to the invite from the principal to help manage the agency.

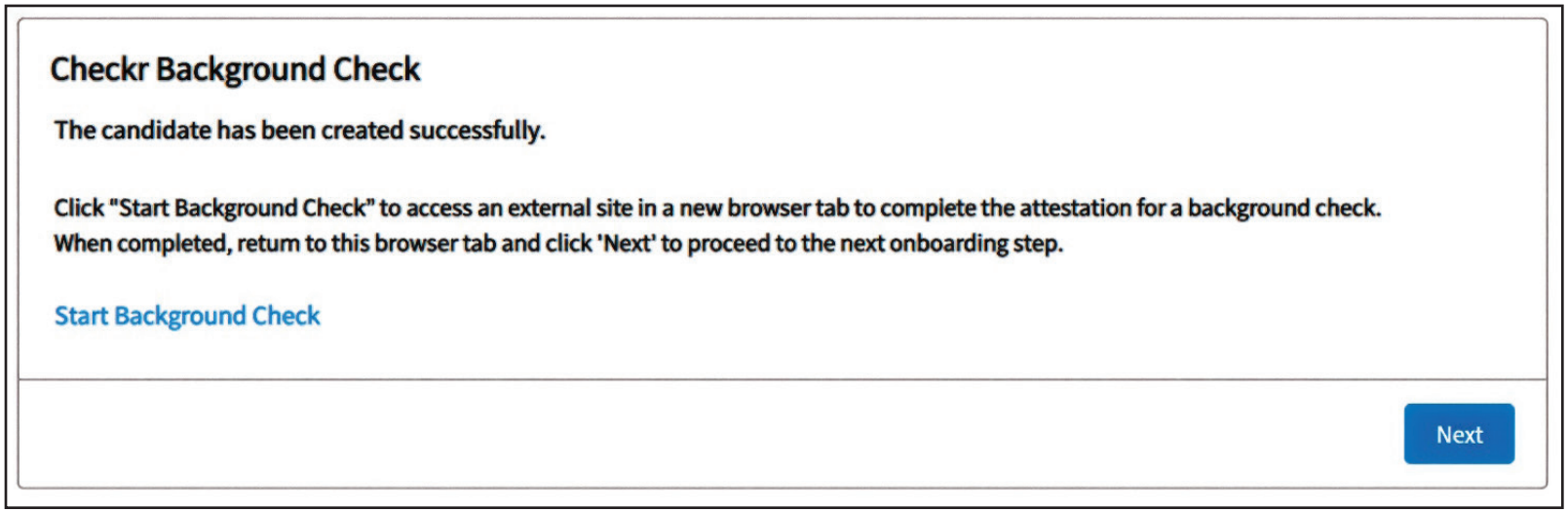
Step 3:

Complete the background check.

For General Agents, Licensed Only Agents and Principal Agents

This screen is where you complete your background check through Checkr.

Click on **Start Background Check** in the left-hand corner.

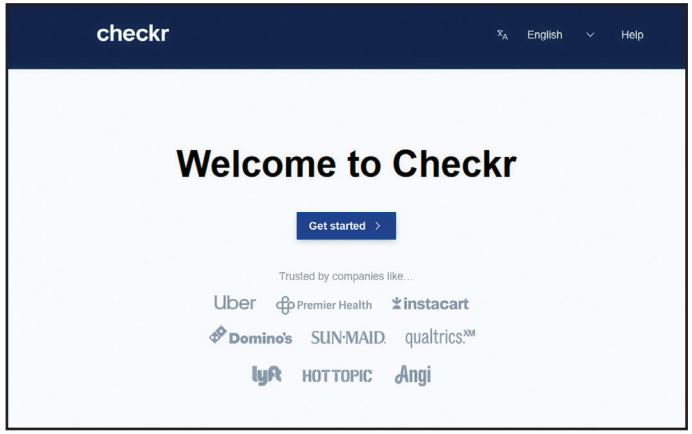


Checkr Background Check

Step 3

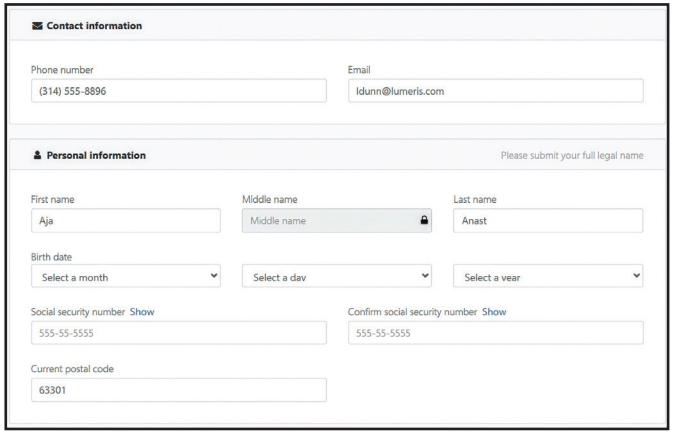
1

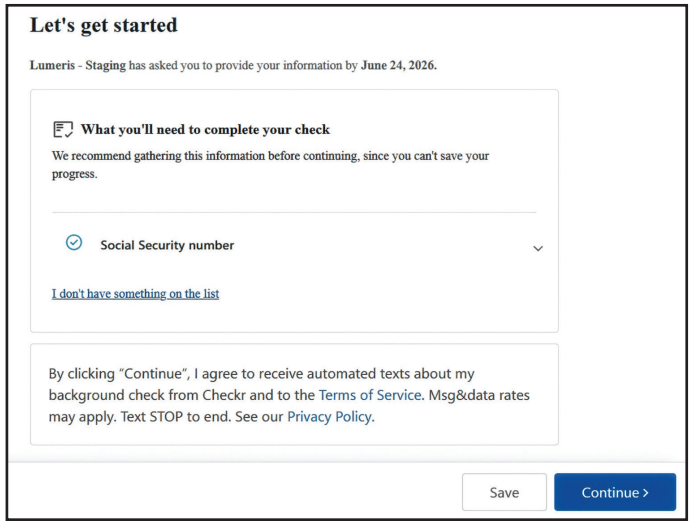
Checkr will open and you will click **Get Started.**
Checkr will open within the page of the onboarding.



2

Click **Continue** to move to the next screen to enter in your personal information.





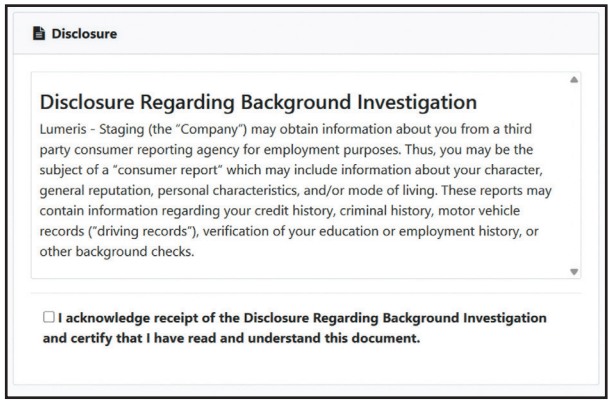
3

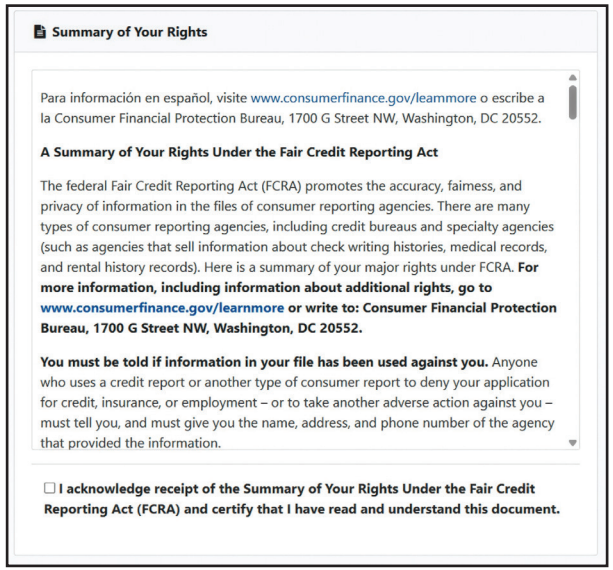
Verify that your personal information is correct.
You will need to enter your social security number and confirm.

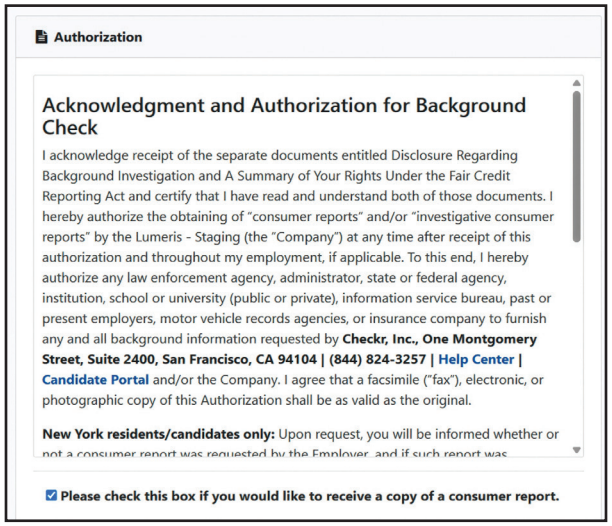
Click **Continue.**

4

Acknowledge the Attestations and click **Continue.** There will be three documents for acknowledgment.

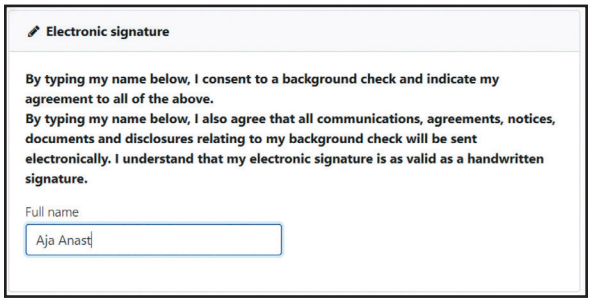






5

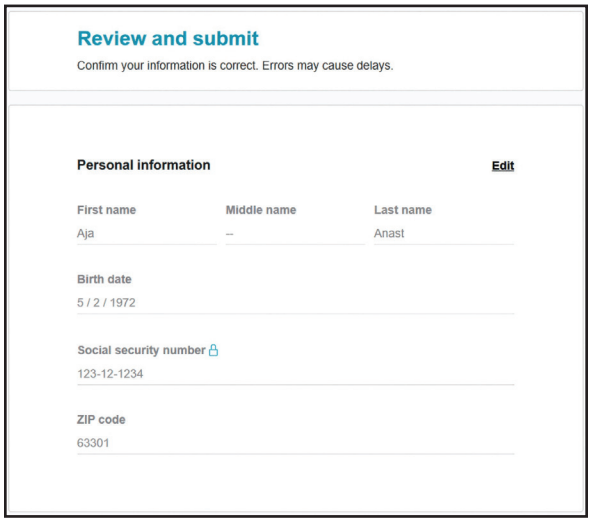
Type in your name to sign for consent to the background check and agreement to the three documents above.



6

Review your information and click edit to make any changes.

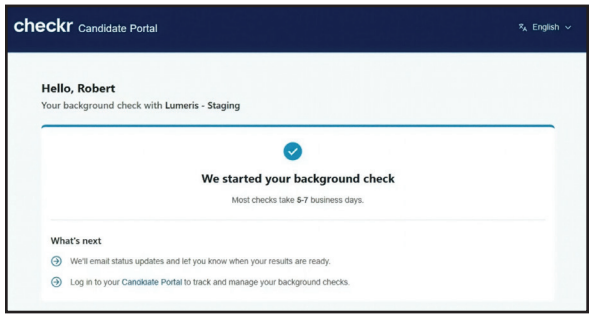
If everything is correct, click **Submit.**



7

You will receive confirmation that the background check has started.

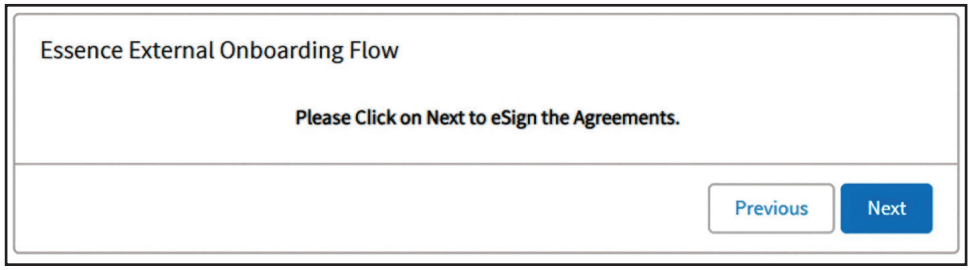
Please allow 5–7 business days for the check to clear.



Step 4:

Sign the producer agreements.

Docusign Agreements



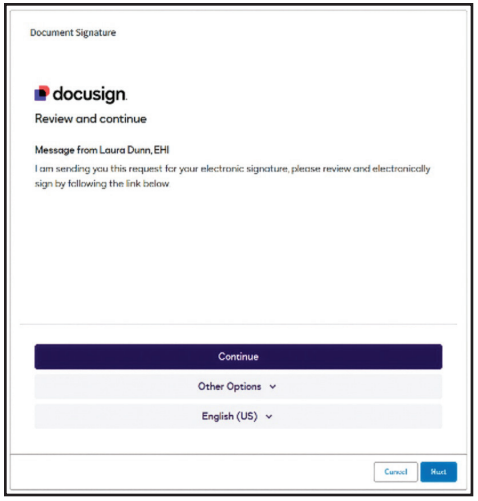
1

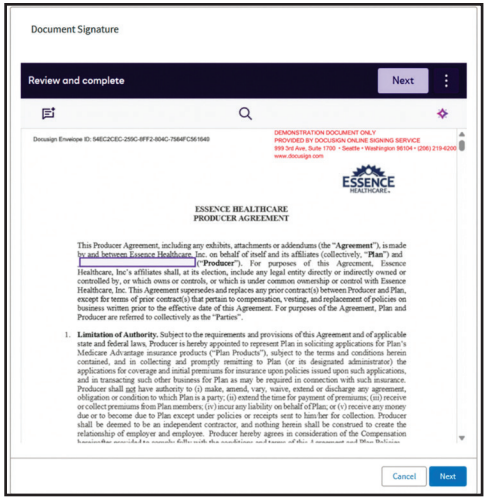
After completing Checkr, you will now be directed to sign the Essence Healthcare Producer Agreements using Docusign.

Click **Next** in the bottom right of the screen.

2

Click on **Sign Agreement** in the center of the page.



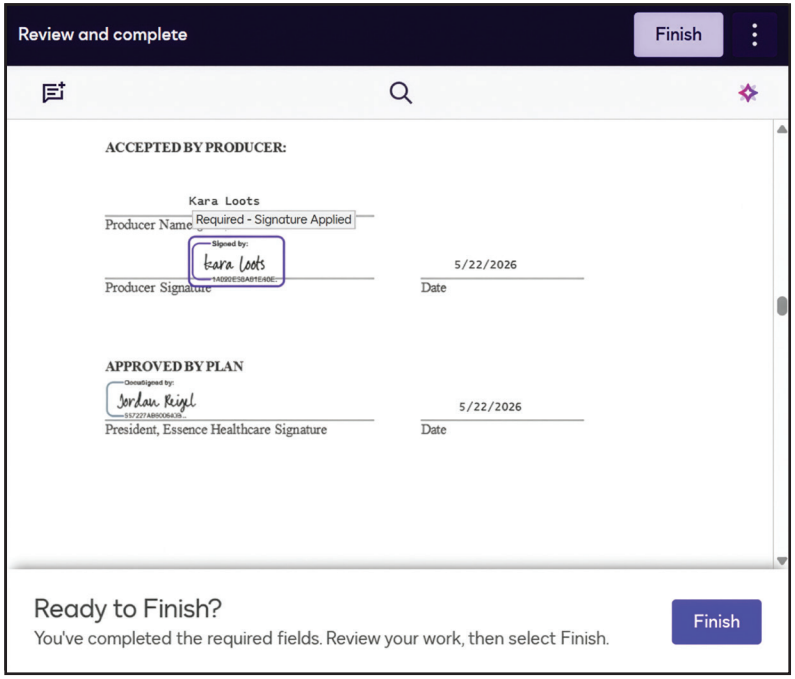


3

Docusign will open within the onboarding page.

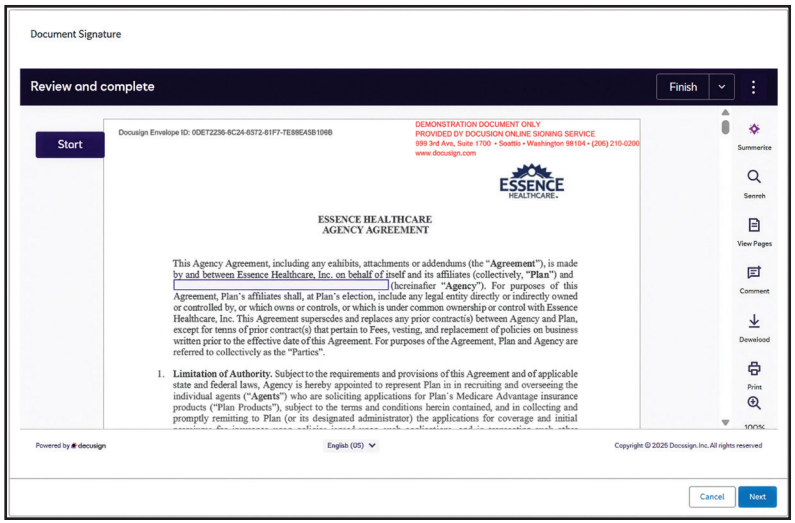
Click **Continue** in **purple** in the center of the page.
The Essence Healthcare Producer Agreement will open.

Click **Next** in **purple** to fill out the correct fields in the document.



4

Click the **Finish** button in the upper right corner or the center of the document after applying a signature.



5

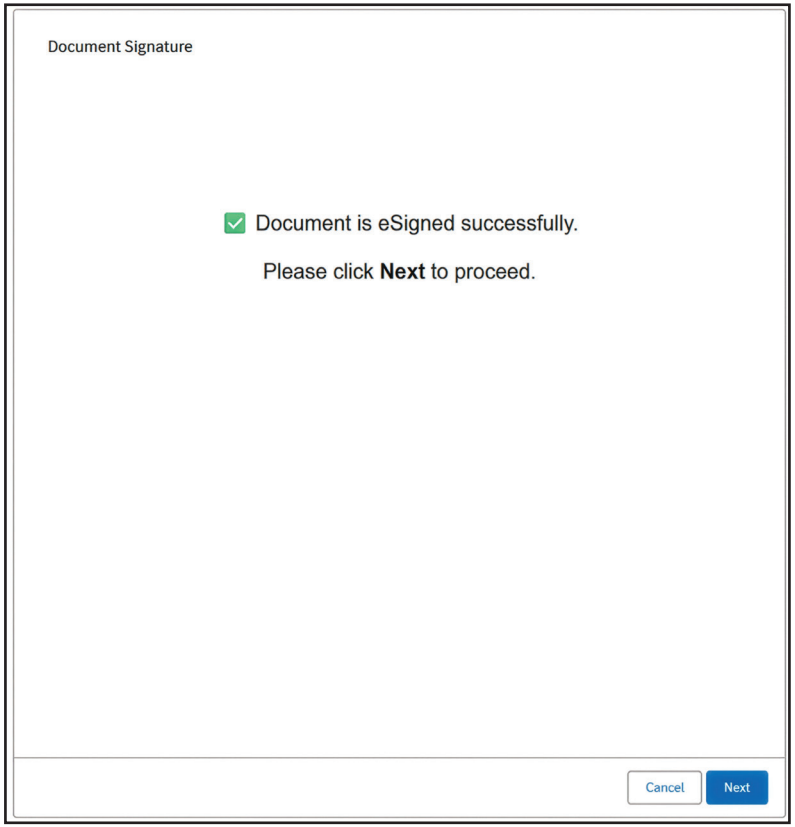
Principal Agents ONLY: You will sign the Agency Agreement and Producer agreement in one document during this step.

In the first box, you will enter the Agency name and then click the **purple Next** to sign your name to satisfy the producer agreement.

6

Click the **Next** button in the bottom right corner after receiving confirmation that the Docusign has been completed successfully.

This document will be saved to the producer's home page, and a signed copy will be emailed via DocuSign.

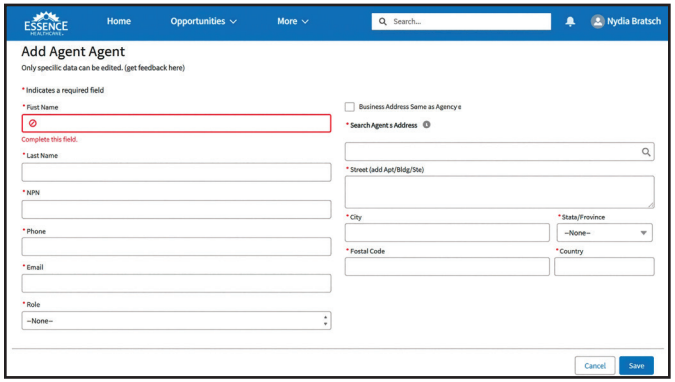


Principal Agents ONLY:

You have the option to:

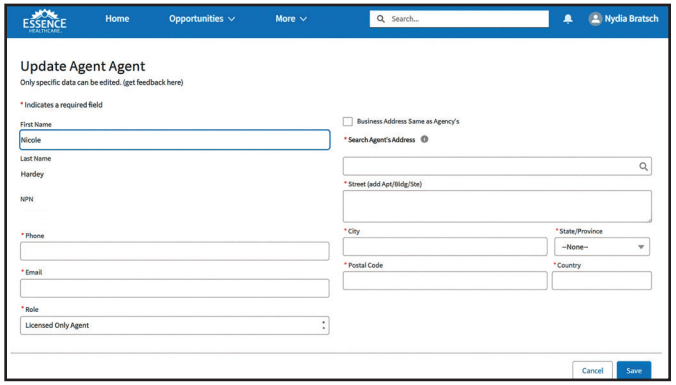
1

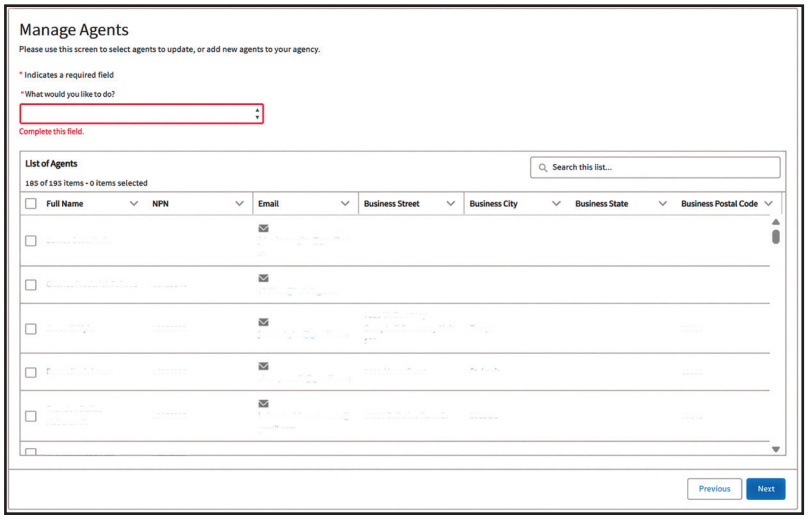
Add agent



2

Update agent: edit existing agents





3

Proceed to the next step: if no changes are needed

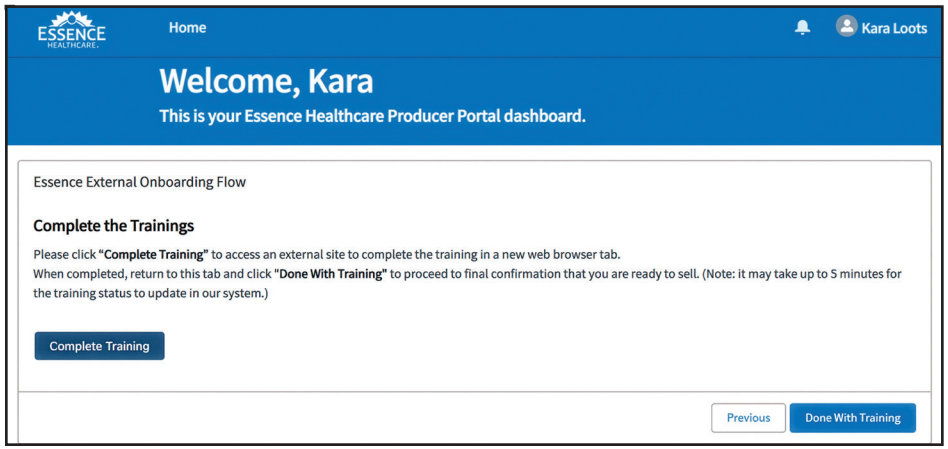
Click **Next** after selecting the correct option.

Step 5:

Complete the required training and certification.

Essence Healthcare Certification Course and Exam

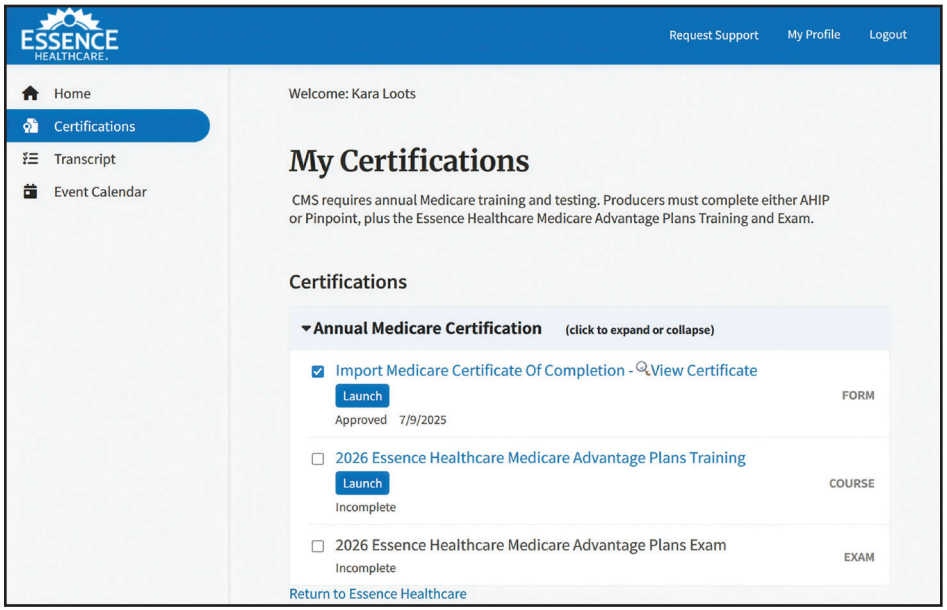
Step 5



1

This page will prompt you to complete the required training.

Click the **Complete Training** button on the left-hand side to access the training website.

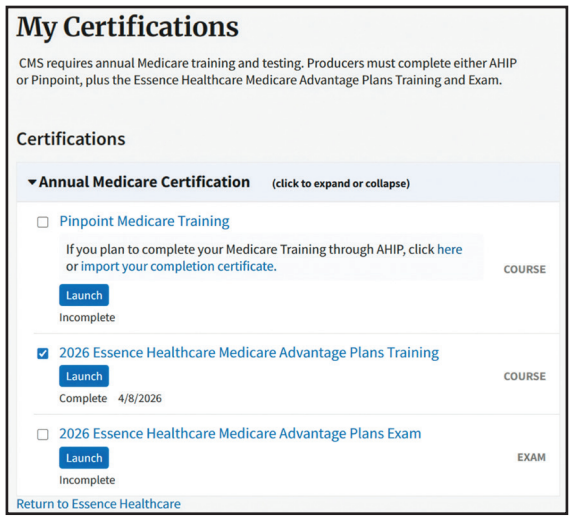


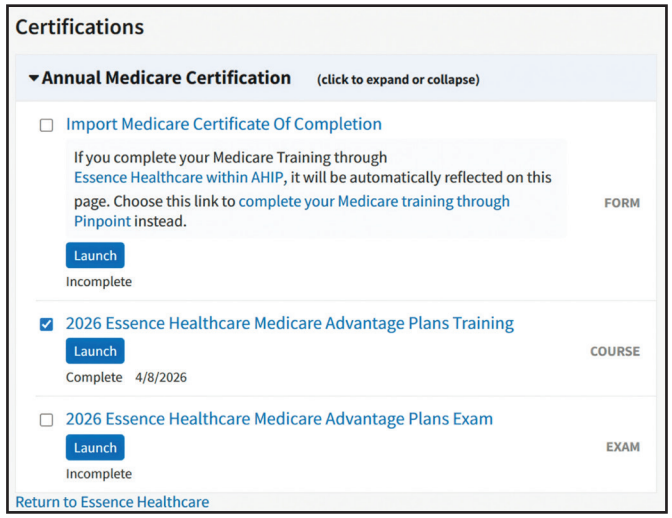
2

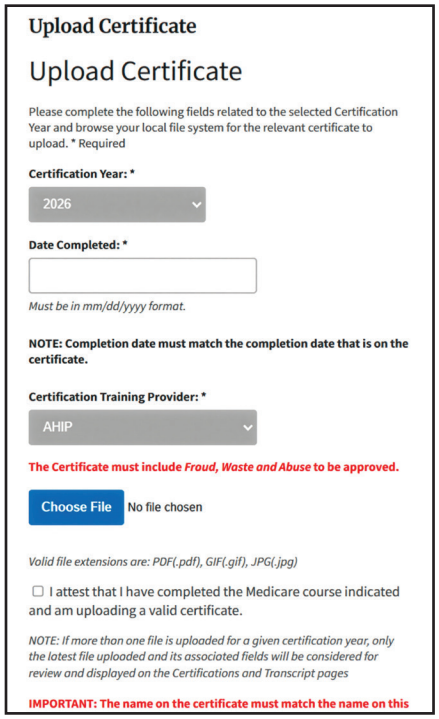
This will open a **new** tab where the producer can upload their annual certification and complete the Essence Healthcare certification course and exam.

3

You can click on **Import your completion certificate** to upload your annual certification. The option to complete your Medicare training through Pinpoint or AHIP will become available. If you want to only upload your Medicare Certificate of Completion, you can click **Launch** or **Import Medicare Certificate of Completion** to upload.







4

If you have already completed your AHIP certification, your NPN will act as a key identifier and will automatically credit your AHIP completion.

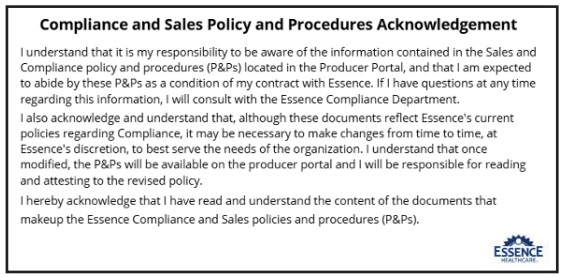
5

Click **Launch** to access the Essence Healthcare Medicare Advantage Plans Training course. This will open the course in a new tab.

Click **Next** in the bottom right corner of the course to go through each slide. This step needs to be completed before you can complete the plan year exam.

6

Important: You will acknowledge the compliance and sales policy and procedures within the Essence Healthcare certification course.



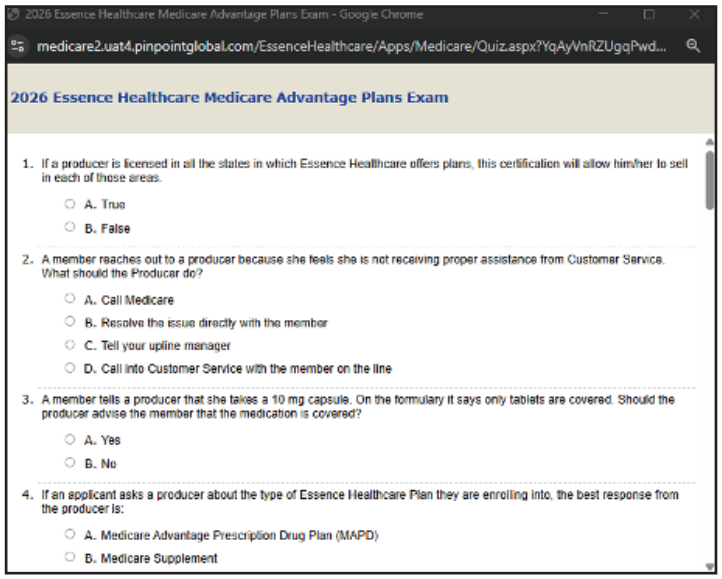
7

Once you get to the last slide, click on **Exit Course** to return to the training website

8

Click **Launch** on the Essence Healthcare Medicare Advantage Plans Exam to complete the certification exam. This will open the exam in a new window. You will get 3 attempts to get a passing score of 85%.

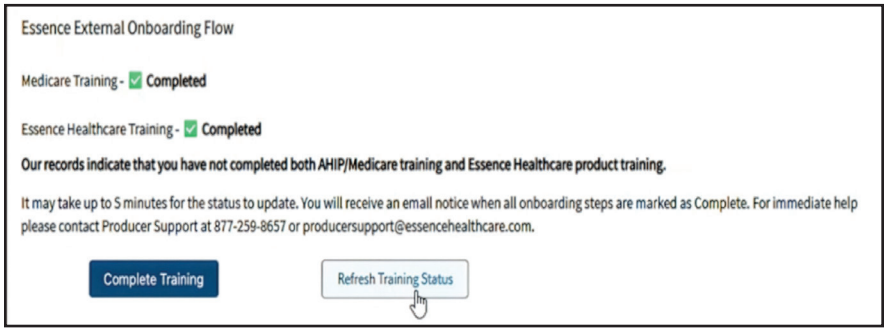
Click **Submit** when finished.

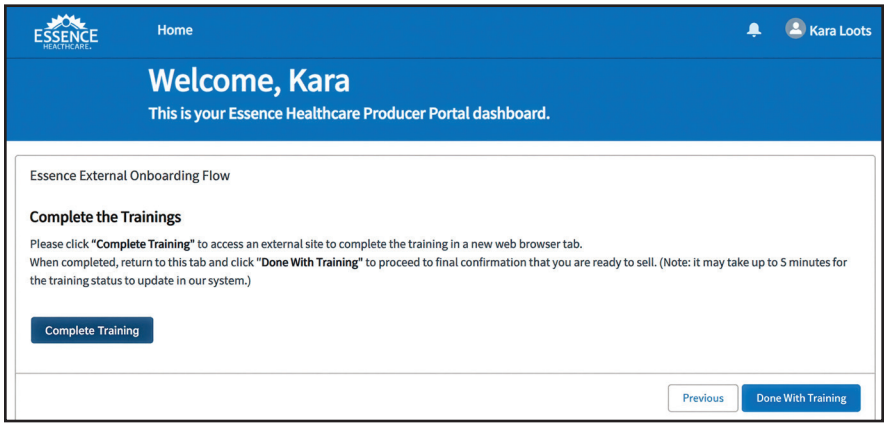


8

After training is completed, **close the tab** to return to the Essence Healthcare onboarding process. Click **Done With Training** in the bottom right-hand corner.

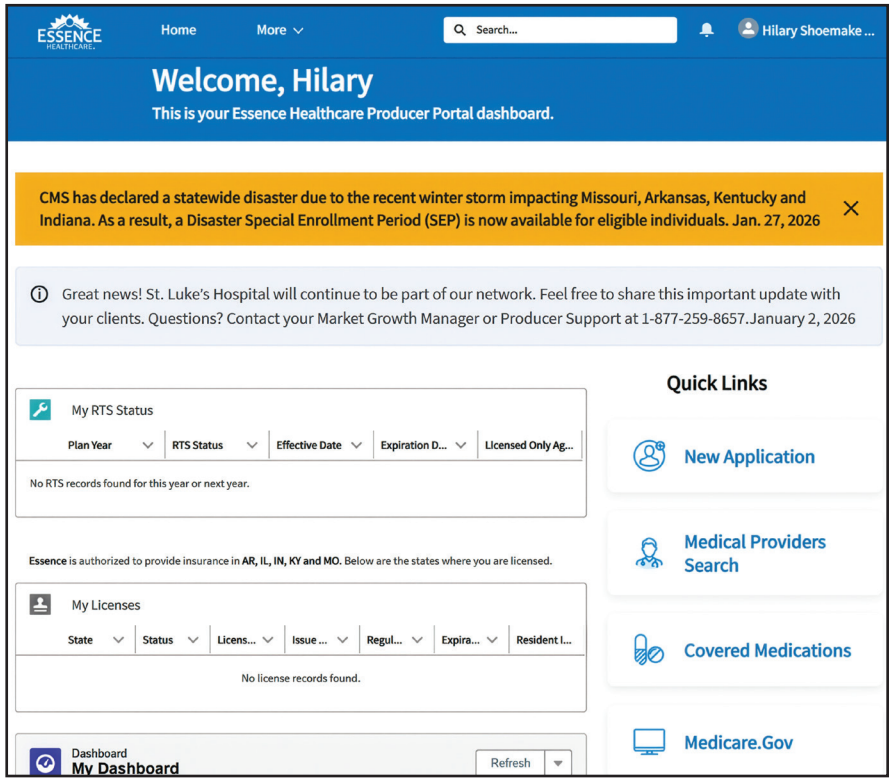
NOTE: It may take up to 5 minutes for the status to refresh. You may need to click **Refresh Training Status** to get the completed status before clicking the **Done With Training** button.



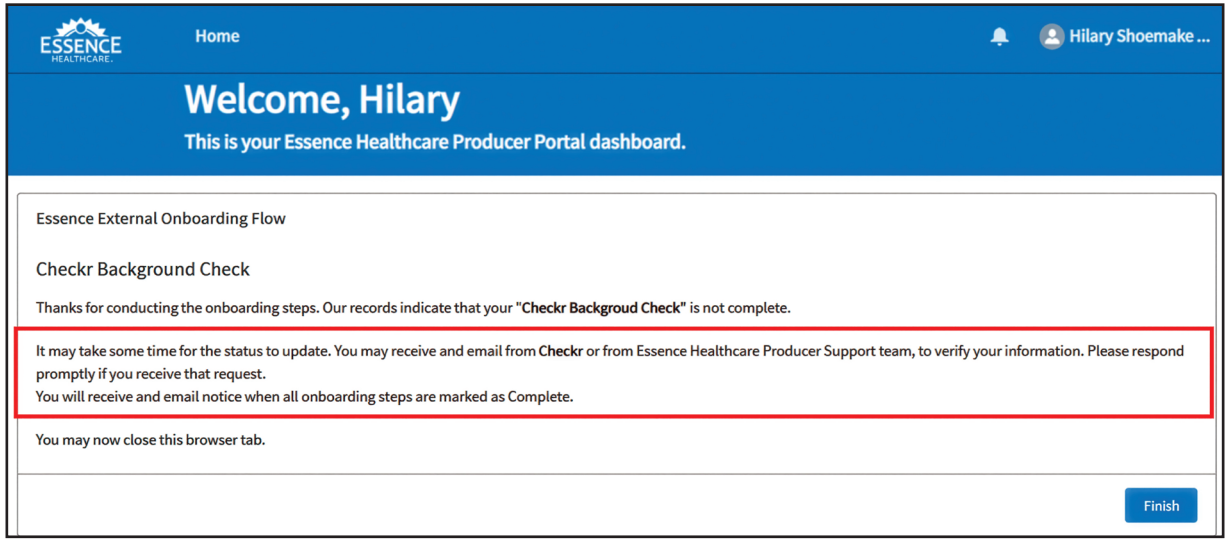


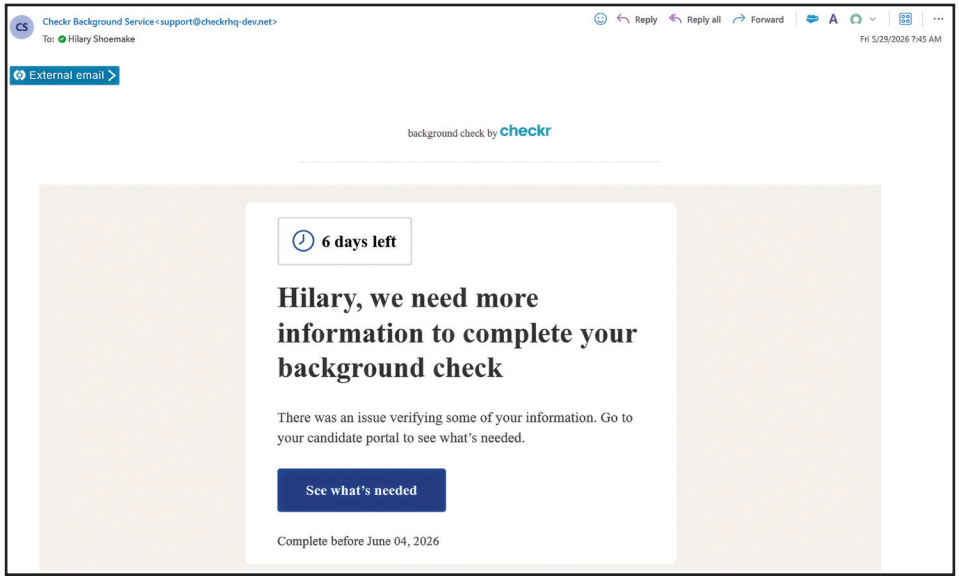
9

Welcome to Essence Healthcare! You have landed on the home page to the producer portal.



Please review any additional information displayed on your screen. There may be an important prompt requiring action outside the Producer Portal before you can complete onboarding.





Appendix

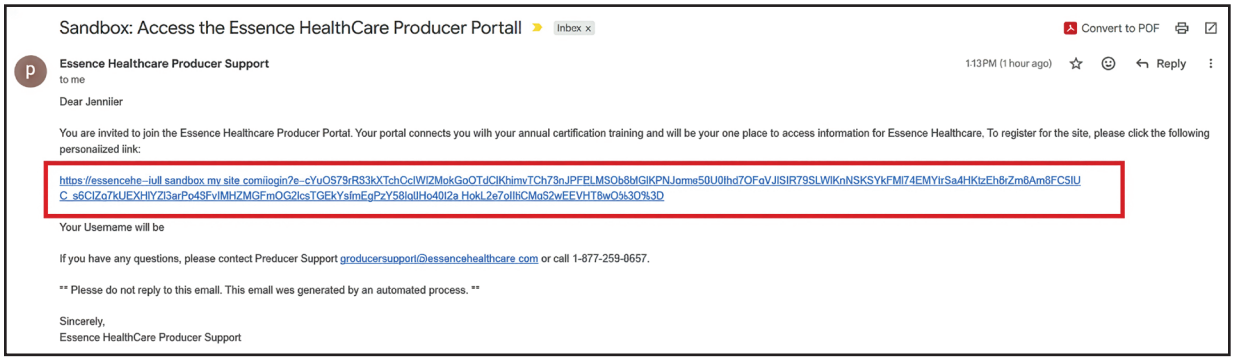
Select your FMO Upline

FMO Selection for Principal Agents

Thank you for your continuous partnership with Essence Healthcare. Please see the steps to select your FMO. If you have any questions, please contact Producer Support at producersupport@essencehealthcare.com or call 1-877-259-8657.

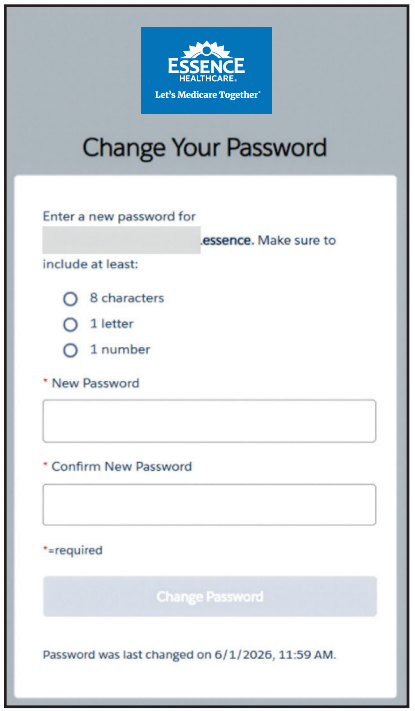
1

Click on the invite link that was sent by email.



2

You will be prompted to change your password.

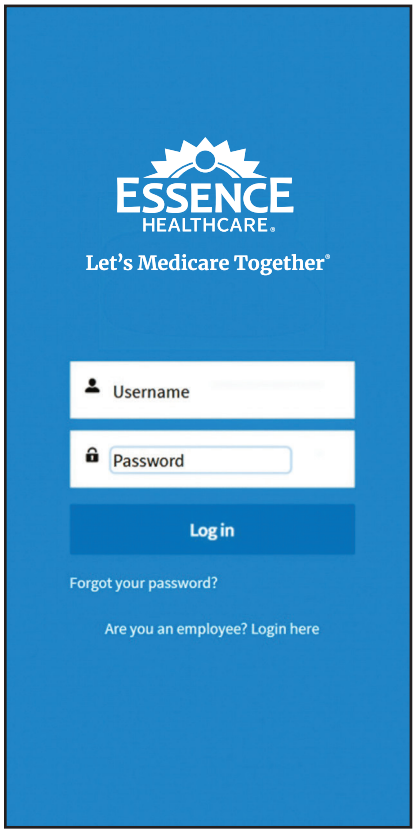


3

Once, your password has been changed, you will need to log in to the portal.

Your username is in the invite email.

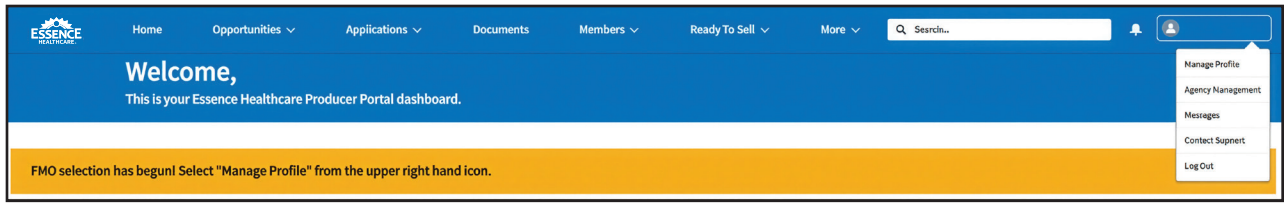
Set up your multi-factor authentication (MFA). For more information on the multi-factor authentication registration, refer to pages 5 through 12 for instructions.



4

After MFA setup, you will land on the home page of the Essence Healthcare Producer Portal page.

1. Click on your name in the right-hand corner.
2. Click on **Manage Profile** from the drop down.



5

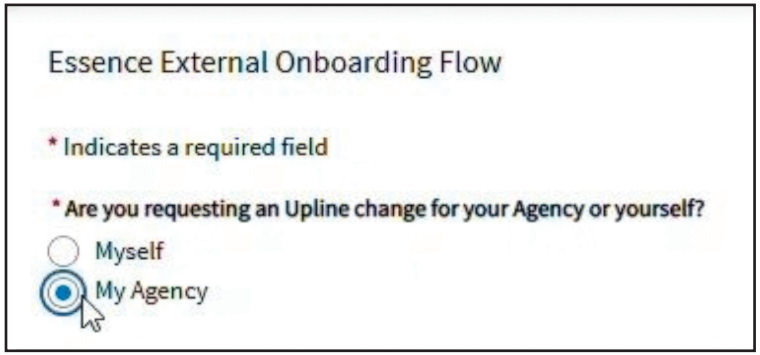
Select the **Upline Change Request** option (last option).

Click **Next.**

6

Select **My Agency.**

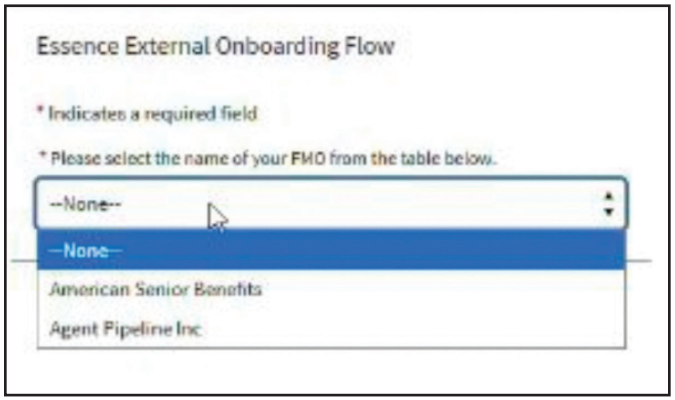
Click **Next.**



7

Choose the FMO name from the drop-down menu. They are listed in alphabetical order.

Click **Next.**



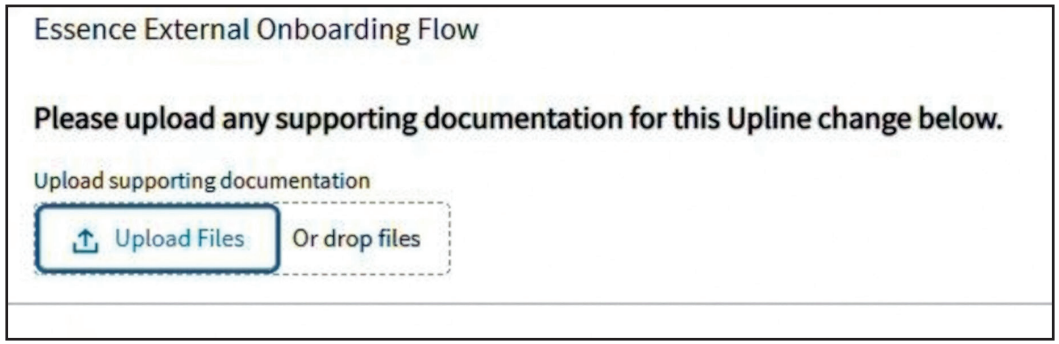
8

Confirm the correct FMO has been selected by checking the box under the Upline Effective Date. Add the **Upline Effective Date.** Click **Next.**

NOTE: The Upline Effective Date should be the 1st of next month..

9

The request for supporting documentation can be disregarded. Click **Next** to bypass.



10

You will receive confirmation that the request for the FMO selection has been received. Click **Next.**

Click **Finish** to save your selections.
You have successfully completed your FMO selection with Essence Healthcare!

Congratulations! You're Ready to Sell.

You've successfully completed your portal setup and training. You're now officially Ready-to-Sell and equipped to start offering our plans to your clients.

Bookmark this link for easy access: https://producer.essencehealthcare.com

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Let's Medicare Together®