Pivot Health

IMPORTANT!

If you are already contracted with Pivot Health, please refer to **Transfer Instructions for Pivot Health**.

Contracting Instructions

Agency owners:

Please request your contracting to **office@benavest.com** instead.

Step 1: Contracting Directions (Independent agents only)

Please refer to Agent Contracting Directions below.
Your browser does not support PDF. Click here to download.

Contracting Directions (LEAD AGENTS)

If you are a Benavest Lead Agent, please refer to **Lead Agent Contracting Directions** below.
Your browser does not support PDF. Click **here** to download.

Once forms are submitted, the contracting process will be as follows:

- Contract pulled and reviewed by the carrier
- If anything additional is needed an email will be sent by the carrier to request additional items. Once additional items are received, processing of the contract will begin.
- Processing takes roughly 24-72 business hours.

Step 2: Welcome Letter

Welcome email that provides instructions to access the Pivot portal. Email will include your **writing agent identification number**, as well as your Account Executive contact information to assist you with writing your first piece of business

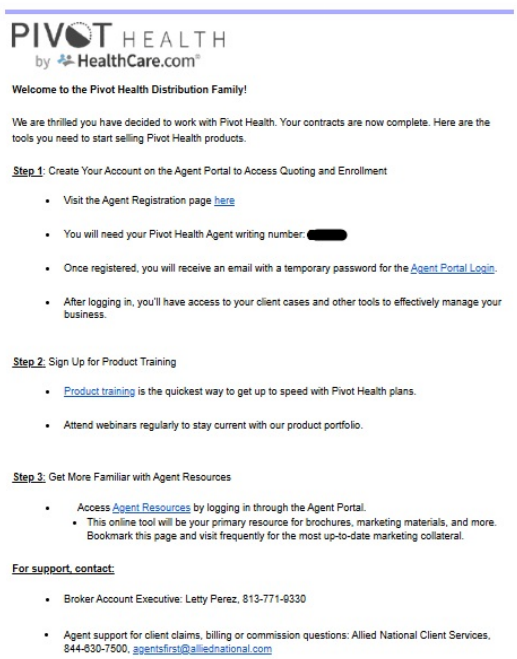
> From: ***phcontracting@healthcare.com***
> Subject: ***Pivot Health Contracting Confirmation - Agent Name - Writing Number***

SAMPLE EMAIL

Pivot Health Contracting Confirmation - [redacted] External

Summarize this email

Pivot Health Contracting <phcontracting@healthcare.com>
[redacted]



PIVOT HEALTH
by HealthCare.com

Welcome to the Pivot Health Distribution Family!

We are thrilled you have decided to work with Pivot Health. Your contracts are now complete. Here are the tools you need to start selling Pivot Health products.

Step 1: Create Your Account on the Agent Portal to Access Quoting and Enrollment

- Visit the Agent Registration page here
- You will need your Pivot Health Agent writing number: [redacted]
- Once registered, you will receive an email with a temporary password for the Agent Portal Login.
- After logging in, you'll have access to your client cases and other tools to effectively manage your business.

Step 2: Sign Up for Product Training

- Product training is the quickest way to get up to speed with Pivot Health plans.
- Attend webinars regularly to stay current with our product portfolio.

Step 3: Get More Familiar with Agent Resources

- Access Agent Resources by logging in through the Agent Portal.
  - This online tool will be your primary resource for brochures, marketing materials, and more. Bookmark this page and visit frequently for the most up-to-date marketing collateral.

For support, contact:

- Broker Account Executive: Letty Perez, 813-771-9330
- Agent support for client claims, billing or commission questions: Allied National Client Services, 844-630-7500, agentsfirst@alliednational.com

REMINDER: Pivot Health will send you a welcome email once they appoint you. Please forward these emails to office@benavest.com.

Transfer Instructions for Pivot Health

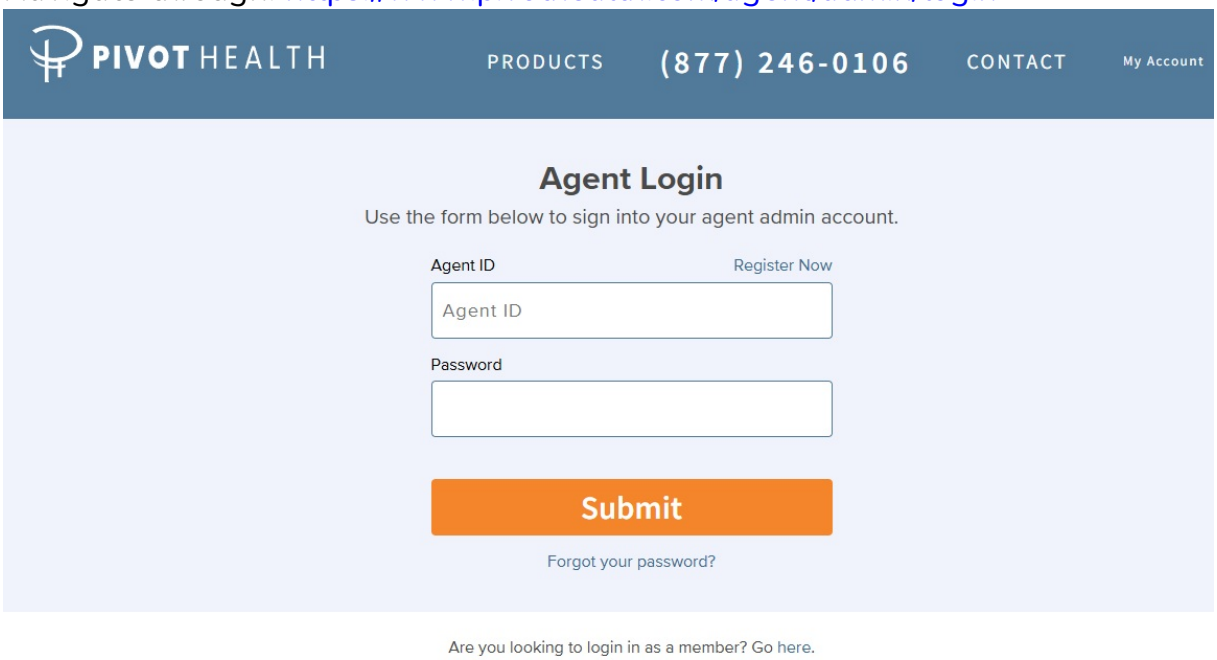
Follow these steps if you are currently appointed under **Pivot Health**
Email: office@benavest.com
Subject: Pivot Health Transfer Request
Benavest Contracting Admin will send you the transfer instructions.

I do not know who is my current GA

Due to privacy policy, the carrier will not give us this information.
You must contact Pivot Health Rule to know who is your current GA.

Carrier Portal

Navigate through: https://www.pivothealth.com/agent/admin/login



Carrier Support Contact Details

agentsfirst@alliednational.com
844-630-7500

Benavest Contact Details

office@benavest.com
(800) 893-7201 x 1610
(954) 947-8694

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