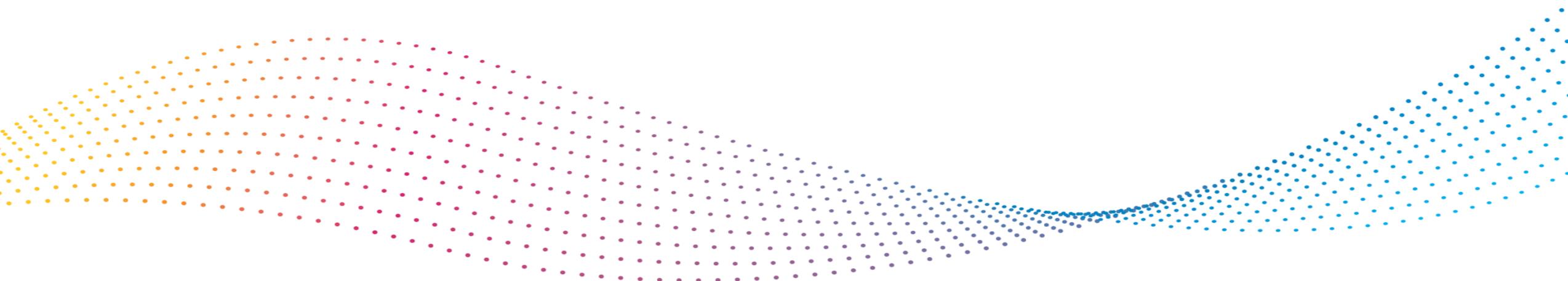


AGENT CONNECT USER GUIDE

2021





AGENT CONNECT USER GUIDE

TABLE OF CONTENTS

Table of Contents

Use the quick links on this page to quickly take you to specific sections in this document.



You may also use CTRL+F to perform a keyword search.

INTRODUCTION

Agent Connect is Centene's Broker secure website that is used for Broker Support Ticketing, Communication, Online Tools, Reporting and other Resources. This guide is intended to help you navigate through Agent Connect and make it easy to do business with us.

AGENT CONNECT & AGENT WORKFLOW ACCESS

SINGLE SIGN-ON PORTAL (SSO)

- [Single Sign-On Overview](#)
- [Setting Up Your Single Sign-On Portal](#)
- [Navigating In Your Single Sign-On Portal](#)
- [Forgotten Password / Password Reset](#)
- [Agent Connect Login and Switch Capability to View as Agency Principal](#)
- [Login to Agent Workflow](#)

AGENT MATERIALS

- [Locating Enrollment Forms and Other Materials in Agent Connect](#)
- [Locating Training Documents and Other Useful Guides in Agent Connect](#)

CREATING SUPPORT TICKETS

- [Creating Support Ticket in Agent Connect Portal](#)
- [Attaching File to Support Ticket](#)
- [Monitoring Support Tickets for Response](#)

IMPORTANT CONTACTS

- [WellCare Contacts and Resources](#)
- [District Sales Manager Contacts](#)

MEMBER APPLICATION TRACKING

- [Tracking Member Application submission using Application Search Tool](#)
- [Locating and Resolving Member application that is in RFI Status](#)

COMMISSIONS

- [Locating and Downloading Commission Statements](#)
- [Downloading Statement Extract](#)
- [Viewing Payment History](#)
- [Viewing Book of Business](#)
- [Downloading Book of Business](#)

SECTION 1 - AGENT PROFILE CHANGES

- [Agent 360 Validation](#)
- [Demographic Changes](#)

SECTION 2 - HIERARCHY & COMMISSION ASSIGNMENT CHANGES, EFT OPTIONS

- [Hierarchy Change/Assignment](#)
- [Hierarchy Change/Assignment – Rejected](#)
- [Hierarchy Change/Assignment – Complete](#)
- [Commission Change/Assignment](#)
- [Commission Assignment Complete](#)
- [EFT Set Up Options](#)

SECTION 3 - REQUIRED FORMS & ACKNOWLEDGEMENT

- [IRS W9 Tax Form](#)

SECTION 4 - LICENSING

- [Confirm Licenses](#)

SECTION 5 - REVIEW & SUBMIT CHANGES

- [Review and Submit Changes](#)
- [Confirmation](#)



AGENT CONNECT USER GUIDE

SINGLE SIGN-ON PORTAL (SSO)



Single Sign-On Portal (SSO)

OVERVIEW

The Single Sign-On (SSO) Portal will enable you access to Agent Connect and the Custom Point Materials Portal via a personalized single sign-on access link.

- You will receive an email similar to this with the **Subject:** Centene: Complete Your PingOne Single Sign-On Registration
- The email will include your SSO portal username (which is your **NPN**) and a temporary password
- By selecting **the URL link provided**, you can begin the process of setting your permanent credentials .

From: <IdentityAccessManager@Wellcare.com>

Subject: Centene: Complete Your PingOne Single Sign-On Registration

Date: April 27, 2021 at 10:33:52 AM EDT

This email is your official invitation to begin using the PingOne Single Sign-On Portal. Please access the URL below and utilize the following login credentials to complete registration:

Username : 100001

Password : \$password

Portal Url : <https://desktop.pingone.com/cnc-callidus-brk>

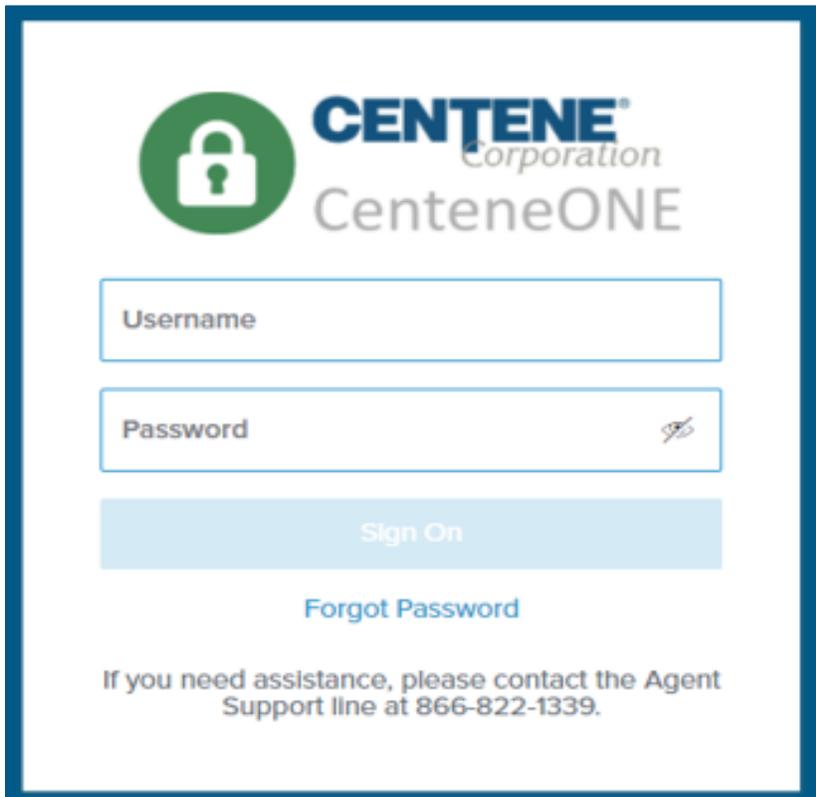
Thank you for your partnership.

This is an auto-generated email – please do not reply.

Single Sign-On Portal (SSO)

SETTING UP YOUR SINGLE SIGN-ON PORTAL

Step 1: From the Log In page below, sign in using your **NPN** in the **Username** field and the Temporary Password provided via email (example below) in the **Password** field. After selecting the **Sign On** button, a **Change Password** screen will appear.



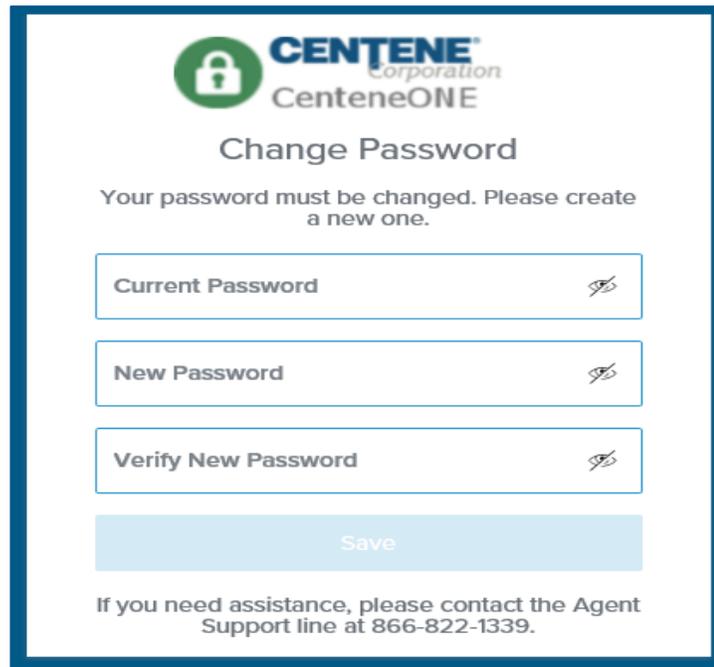
*If you did not receive the introductory email with log-in credentials, select the following link (or copy / paste it to your internet browser), and use the instructions in the **FORGOTTEN PASSWORD / PASSWORD RESET** section of this presentation to complete portal set up.*

<https://desktop.pingone.com/cnc-callidus-brk>

Single Sign-On Portal (SSO)

SETTING UP YOUR SINGLE SIGN-ON PORTAL

Step 2: Change your password by entering the temporary one in the **Current Password** field and a new password that meets the minimum password requirements in the **New Password** and **Verify New Password** field. (Take a moment to note your password in a secure location.)

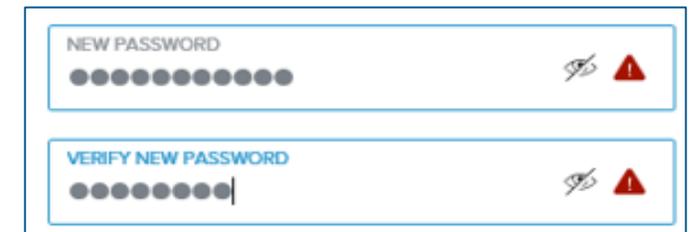


The screenshot shows the CenteneONE Change Password interface. At the top is the Centene Corporation logo and the text 'Change Password'. Below this is a message: 'Your password must be changed. Please create a new one.' There are three input fields: 'Current Password', 'New Password', and 'Verify New Password', each with a toggle icon. A 'Save' button is located below the fields. At the bottom, there is a note: 'If you need assistance, please contact the Agent Support line at 866-822-1339.'

- Minimum Password Requirements:
- ✓ Differs from current password
 - ✓ No more than 2 repeated characters
 - ✓ 5 unique characters
 - ✓ 8 characters
 - 1 special character
 - ✓ 1 number
 - ✓ 1 UPPERCASE character
 - ✓ 1 lowercase character



*If the new passwords entered do not match, a red triangle will appear on the right side of the **New Password** and **Verify New Password** fields. Correct the entries so that the fields match.*



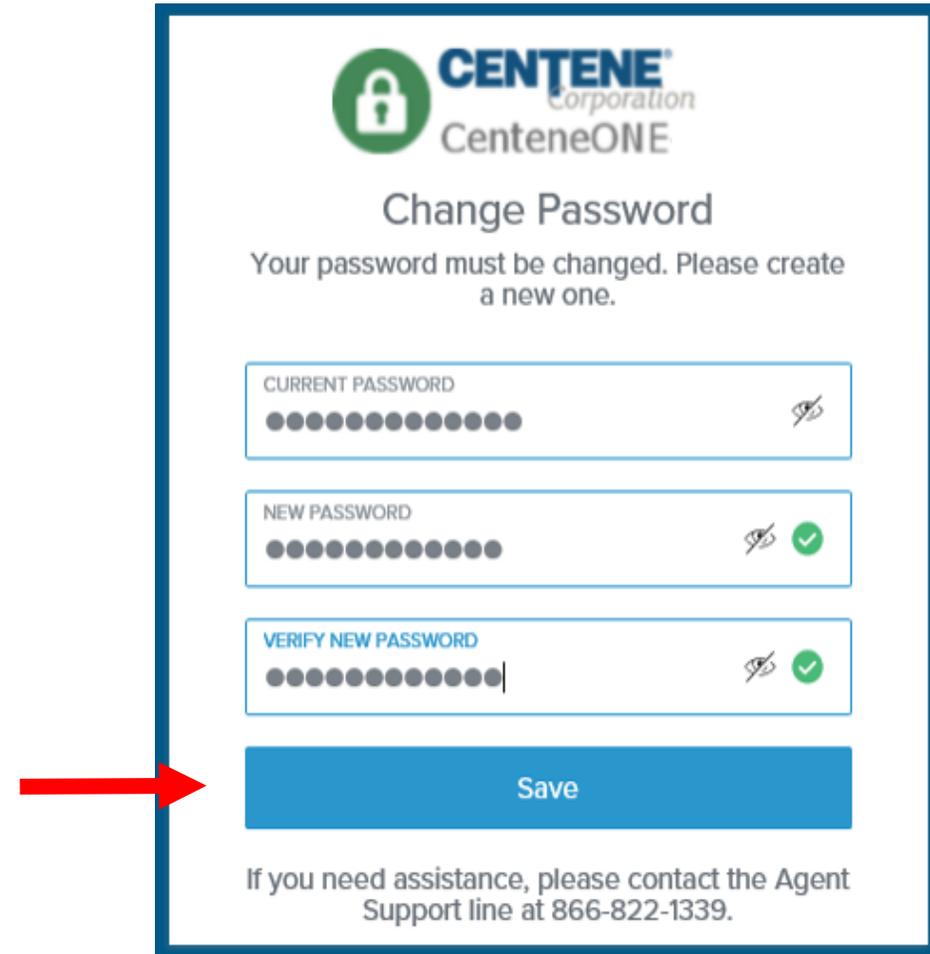
This close-up shows the 'NEW PASSWORD' and 'VERIFY NEW PASSWORD' fields. Both fields contain masked characters (dots) and have a red triangle warning icon on the right side, indicating a mismatch between the two fields.

Single Sign-On Portal (SSO)

SETTING UP YOUR SINGLE SIGN-ON PORTAL

Step 3: When matching and compliant passwords have been entered in the **New Password** and **Verify New Password** fields, a green circle with a checkmark will appear in the **New Password** and **Verify New Password** fields. The **Save** button will become active.

Select the **Save** button.



CENTENE
Corporation
CenteneONE

Change Password

Your password must be changed. Please create a new one.

CURRENT PASSWORD
●●●●●●●●●● 

NEW PASSWORD
●●●●●●●●●●  

VERIFY NEW PASSWORD
●●●●●●●●●●  

Save

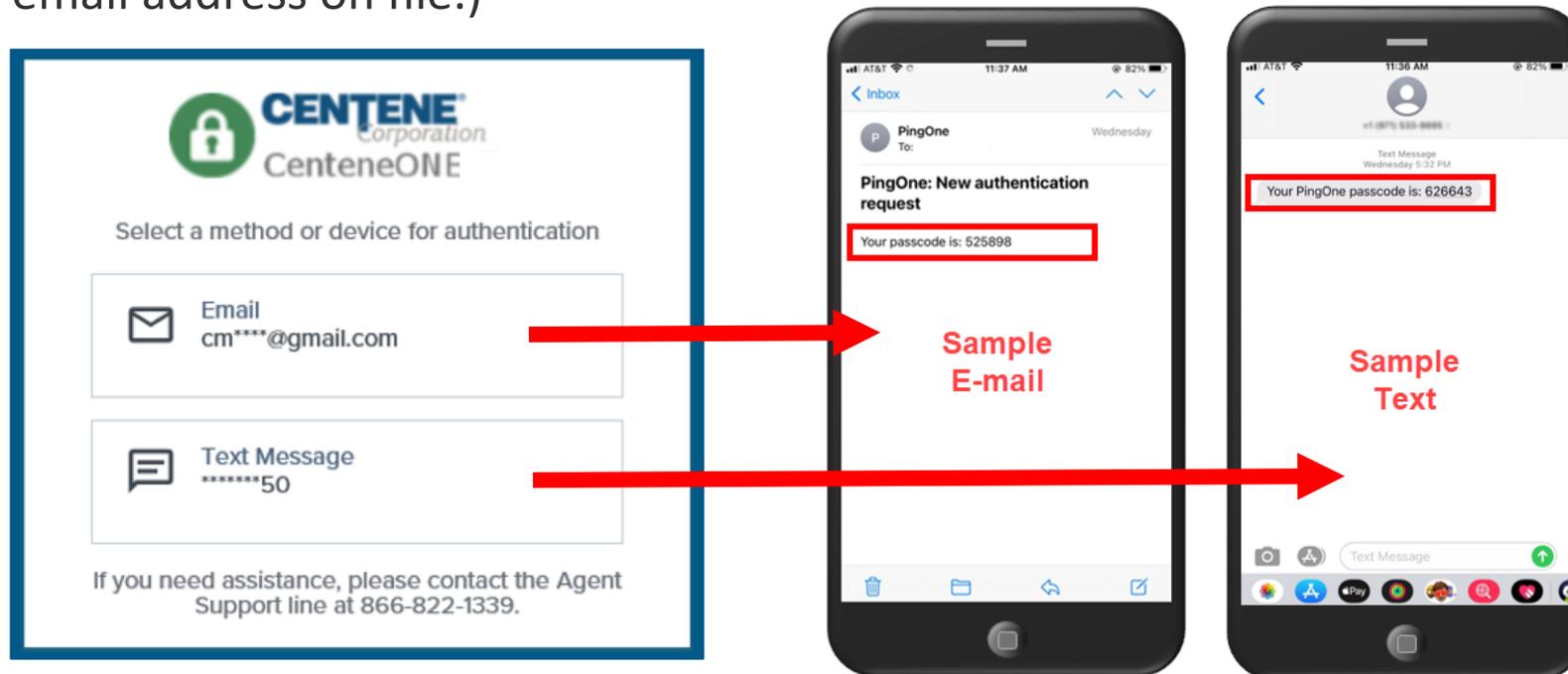
If you need assistance, please contact the Agent Support line at 866-822-1339.

Single Sign-On Portal (SSO)

SETTING UP YOUR SINGLE SIGN-ON PORTAL

Step 4: If you only have an email on file, a code will be sent to your email and you will advance to an authentication code entry screen. If you have both an email and a cell phone number on file, an authentication option screen will appear.

Select the **Email** option or the **Text Message** option, based on your preference. (Selecting **Text Message** will text an authentication code to the cell phone number on file. Selecting **Email** will email the code to the email address on file.)



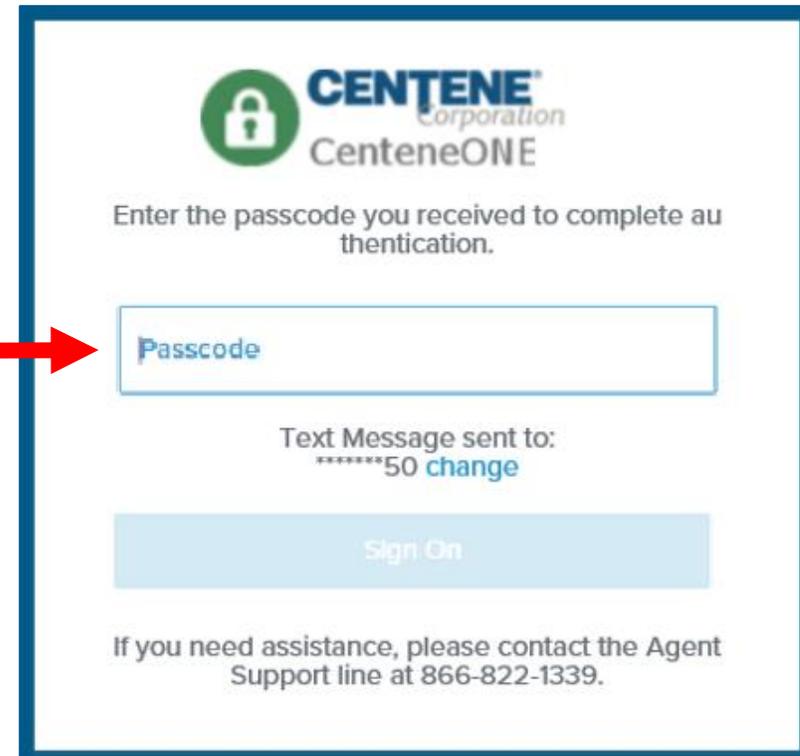
Single Sign-On Portal (SSO)

SETTING UP YOUR SINGLE SIGN-ON PORTAL

Step 5: When the authentication code entry screen appears, type the code you received via email or text in the **Passcode** field. (Notice that the screen will tell you where the passcode was sent to, in case you cannot locate it.)



The screenshot shows the SSO authentication screen for email delivery. At the top is the CENTENE Corporation CenteneONE logo. Below the logo, the text reads "Enter the passcode you received to complete authentication." A red arrow points to a text input field labeled "Passcode". Below the field, it says "Email sent to: cm****@gmail.com". At the bottom is a light blue "Sign On" button. At the very bottom, it says "If you need assistance, please contact the Agent Support line at 866-822-1339."



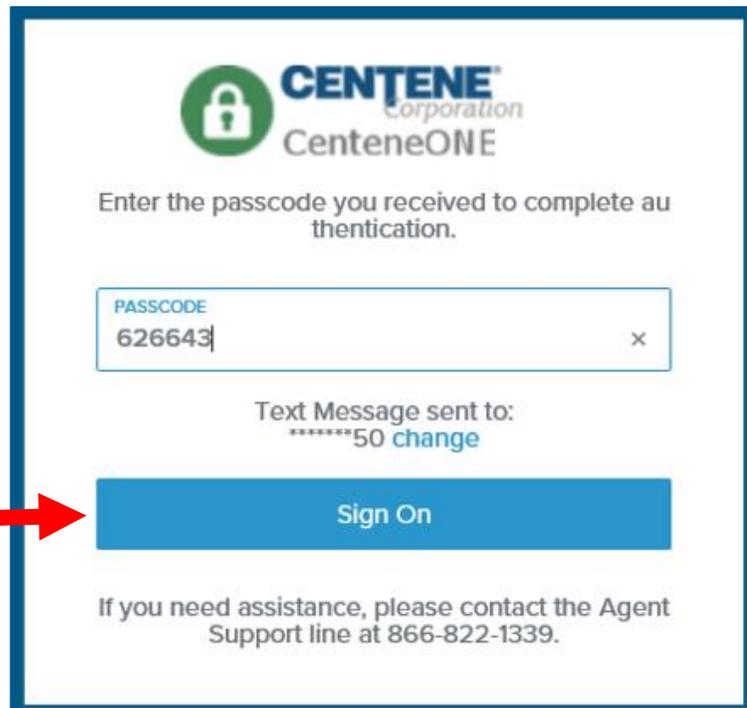
The screenshot shows the SSO authentication screen for text message delivery. At the top is the CENTENE Corporation CenteneONE logo. Below the logo, the text reads "Enter the passcode you received to complete authentication." A red arrow points to a text input field labeled "Passcode". Below the field, it says "Text Message sent to: *****50 change". At the bottom is a light blue "Sign On" button. At the very bottom, it says "If you need assistance, please contact the Agent Support line at 866-822-1339."

Single Sign-On Portal (SSO)

SETTING UP YOUR SINGLE SIGN-ON PORTAL

Step 6: When you have populated the authentication code in the **Passcode** field, the **Sign On** button will become active.

Select the **Sign On** button.

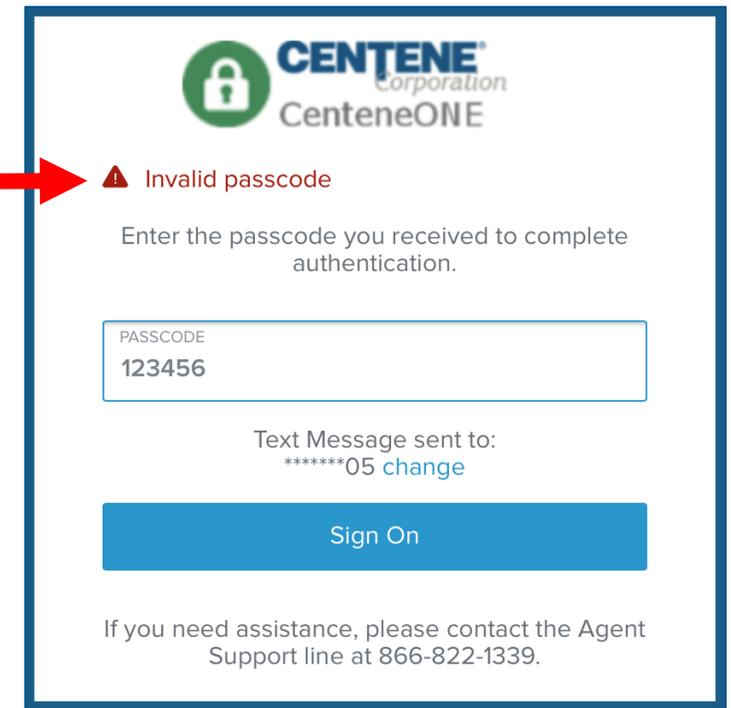


The screenshot shows the Centene Corporation CenteneONE SSO portal. At the top is the logo. Below it, the text reads "Enter the passcode you received to complete authentication." A text input field labeled "PASSCODE" contains the number "626643". Below the field, it says "Text Message sent to: *****50 change". A blue "Sign On" button is highlighted with a red arrow pointing to it from the left. At the bottom, it says "If you need assistance, please contact the Agent Support line at 866-822-1339."



*(If you entered the wrong code, the **Invalid passcode** error will appear.*

*Correct the code, and select the **Sign On** button.)*



The screenshot shows the same Centene SSO portal. The "PASSCODE" field now contains "123456". Above the field, a red warning icon and the text "Invalid passcode" are displayed. Below the field, it says "Text Message sent to: *****05 change". The "Sign On" button is no longer highlighted. A red arrow points from the warning message to the "Invalid passcode" text. At the bottom, it says "If you need assistance, please contact the Agent Support line at 866-822-1339."

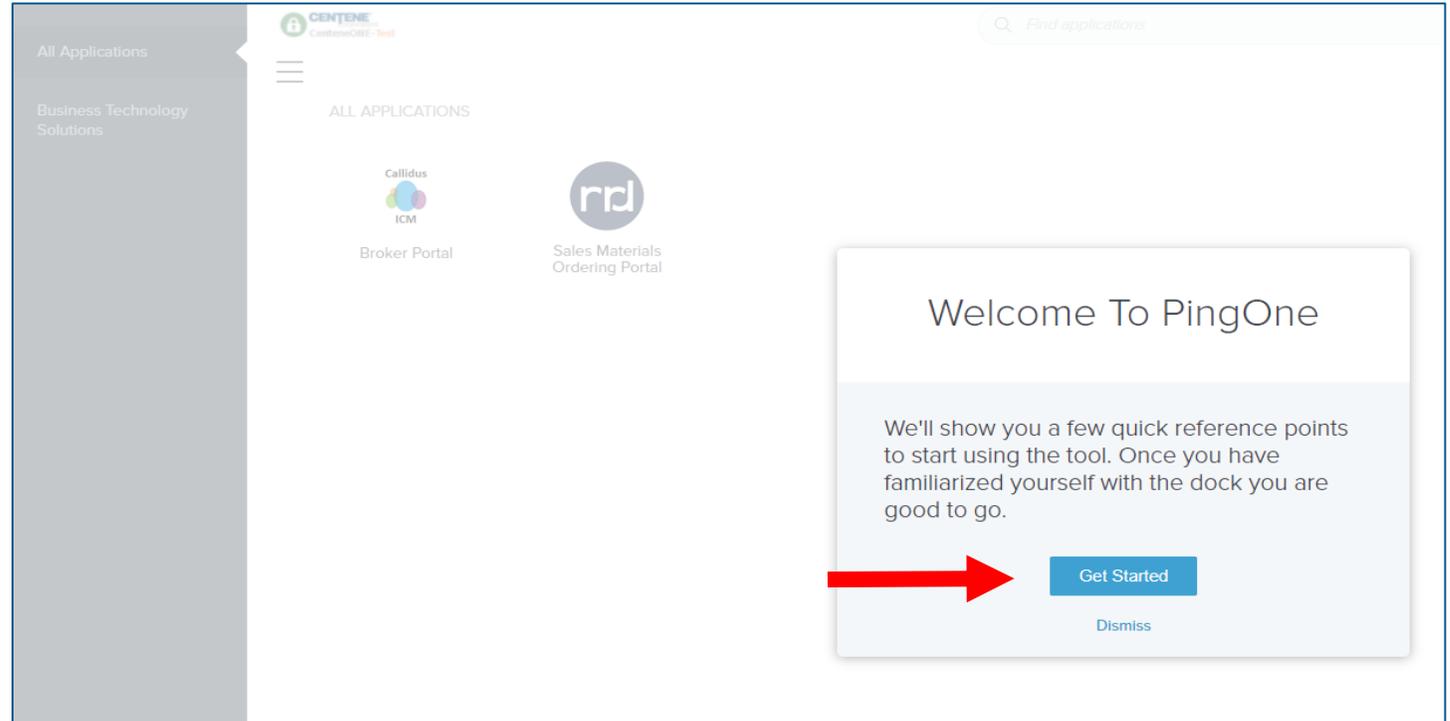
Single Sign-On Portal (SSO)

NAVIGATING IN YOUR SINGLE SIGN-ON PORTAL

Step 1: Upon selecting the **Sign On** button, you will be routed to the **PingOne Single Sign-On Portal**.

Select the **Get Started** button.

You will be provided with some navigational tips regarding the portal. (If you select the **Dismiss** link, you will bypass the additional information.)



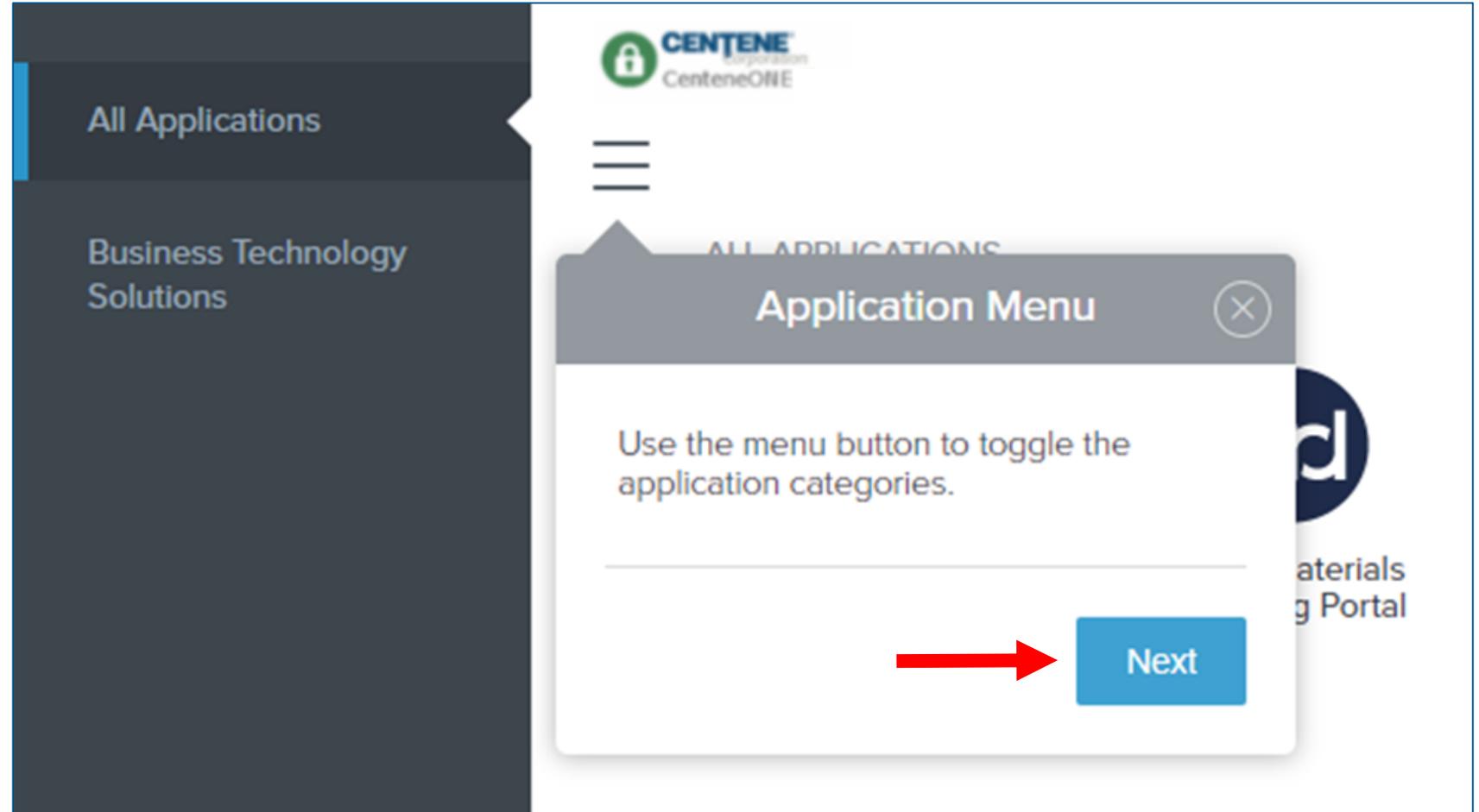
Single Sign-On Portal (SSO)

NAVIGATING IN YOUR SINGLE SIGN-ON PORTAL

Step 2: Notice the **Application Menu** button.

It will allow you to toggle the application categories.

Select the **Next** button.



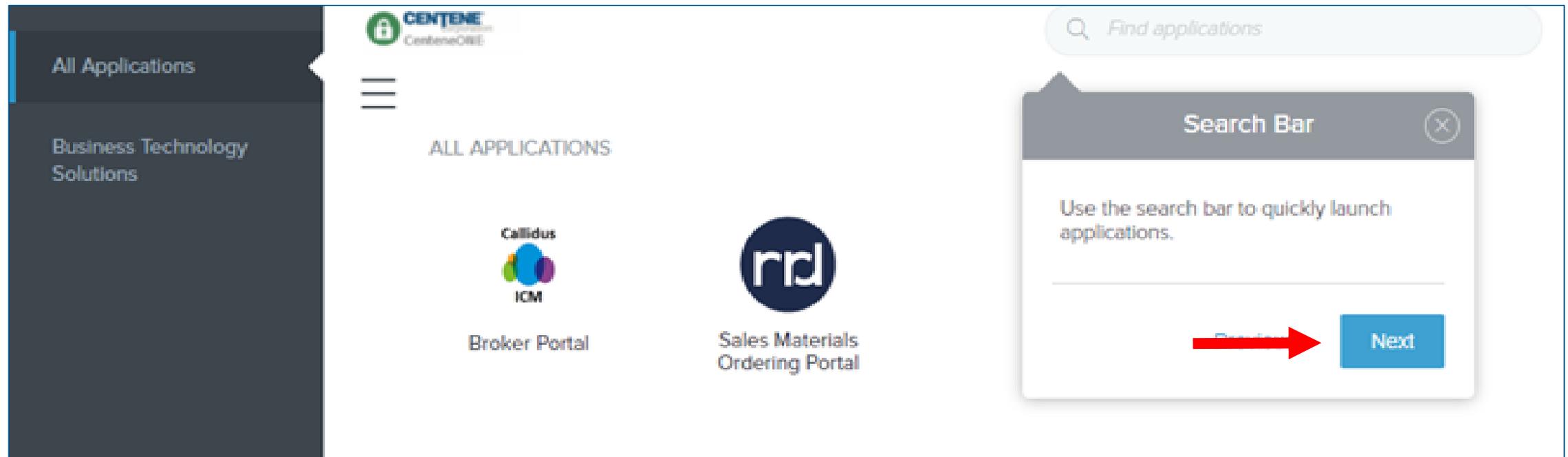
Single Sign-On Portal (SSO)

NAVIGATING IN YOUR SINGLE SIGN-ON PORTAL

Step 3: Notice the **Search Bar**.

Use it to search for and quickly launch applications.

Select the **Next** button.



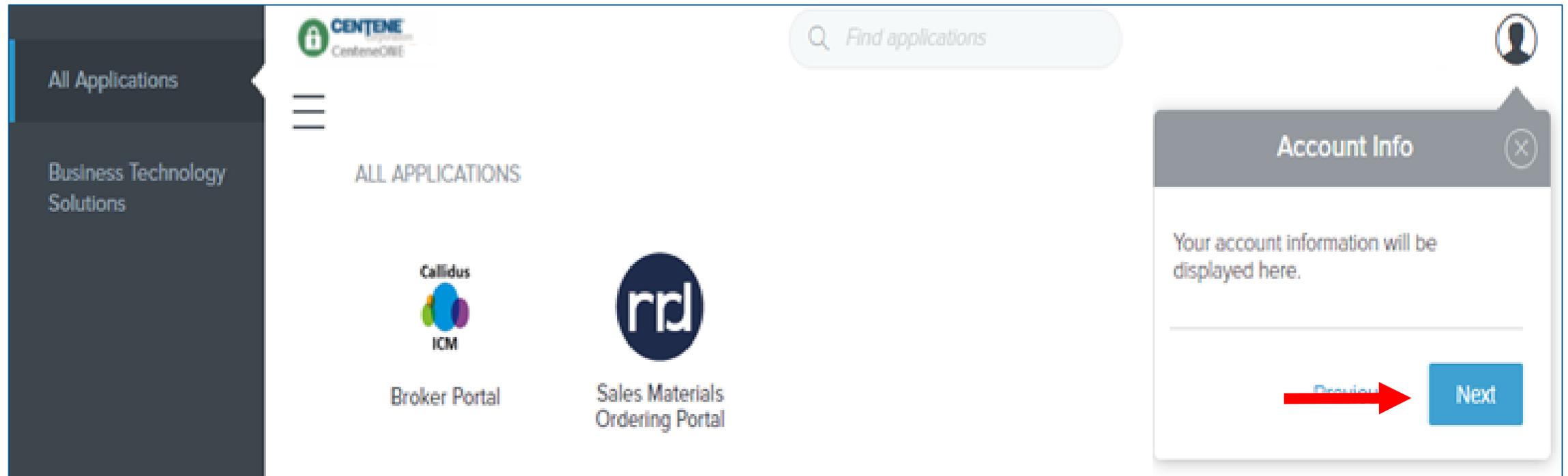
Single Sign-On Portal (SSO)

NAVIGATING IN YOUR SINGLE SIGN-ON PORTAL

Step 4: Notice the **Account Info** section.

Account information is accessed here.

Select the **Next** button.



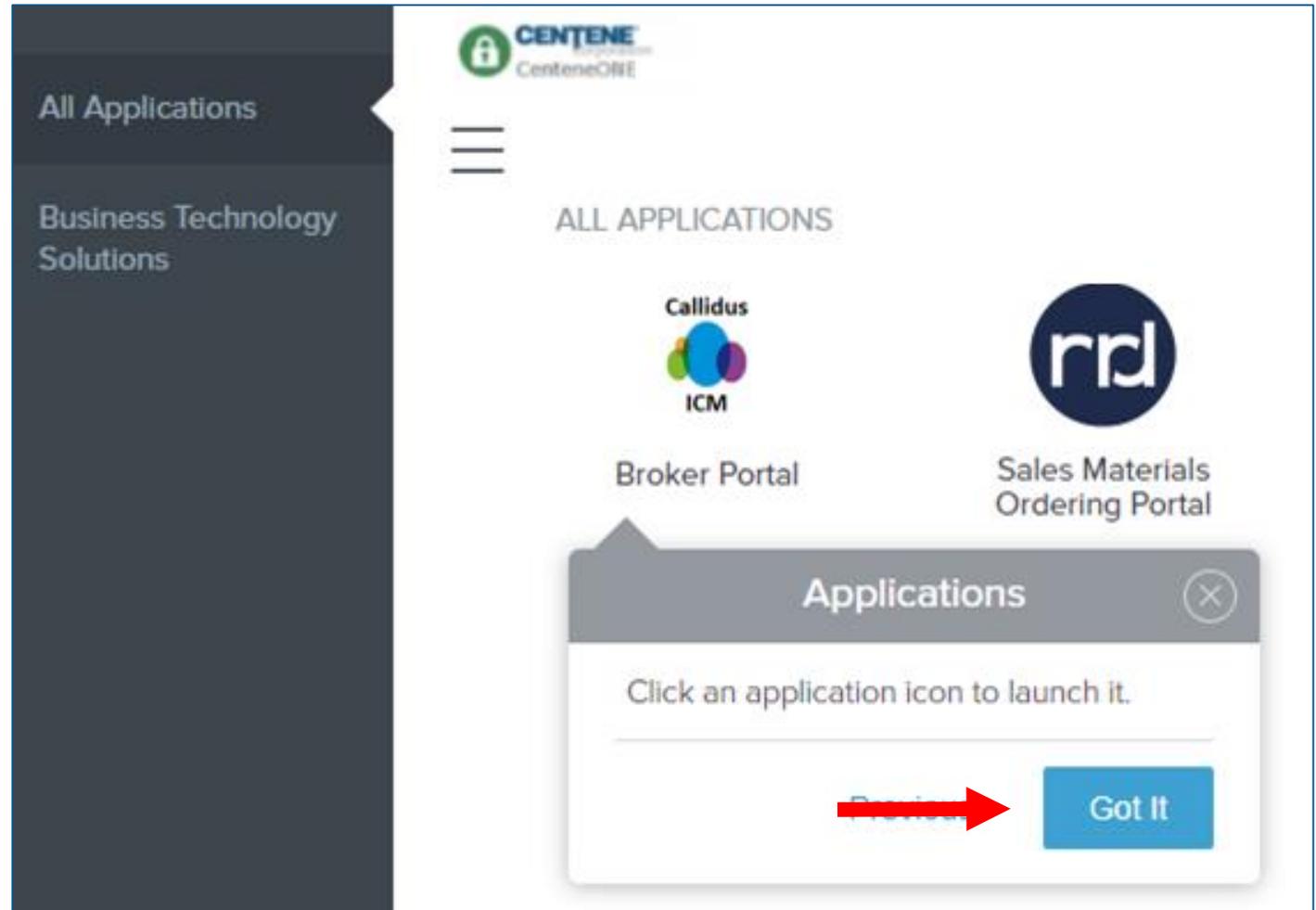
Single Sign-On Portal (SSO)

NAVIGATING IN YOUR SINGLE SIGN-ON PORTAL

Step 5: Notice the **Applications** section.

Applications can be launched by selecting their icons.

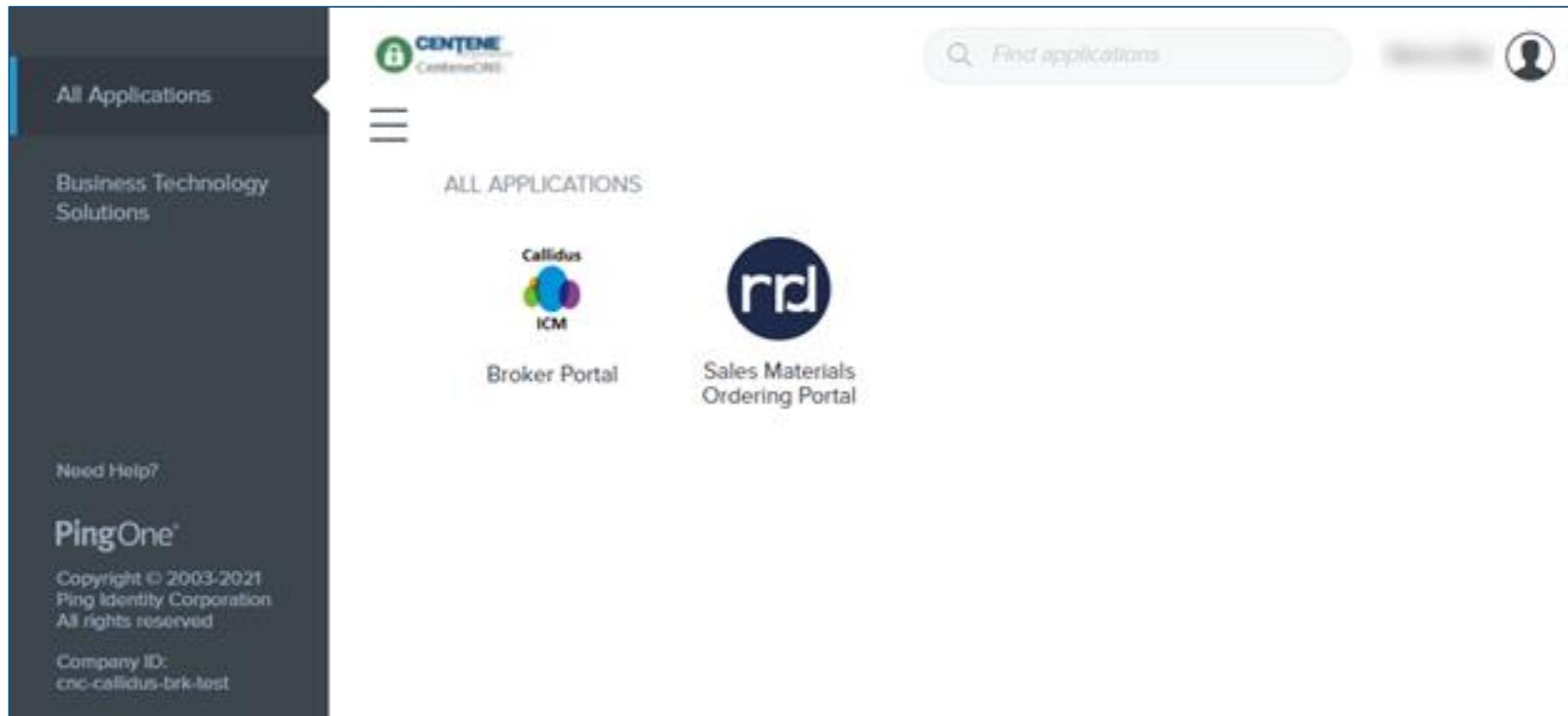
Select the **Got It** button to proceed.



Single Sign-On Portal (SSO)

NAVIGATING IN YOUR SINGLE SIGN-ON PORTAL

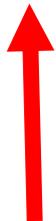
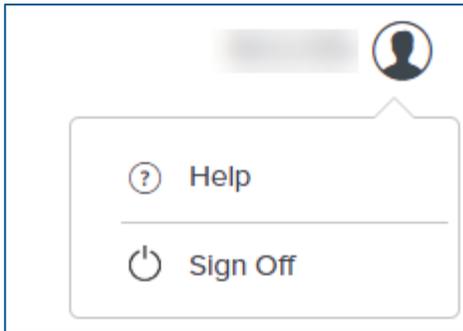
The Single Sign-On Portal is ready for use. Explore and access applications like Agent Connect (Broker Portal) and Custom Point (Sales Materials Ordering Portal) to leverage the tools and support you need.



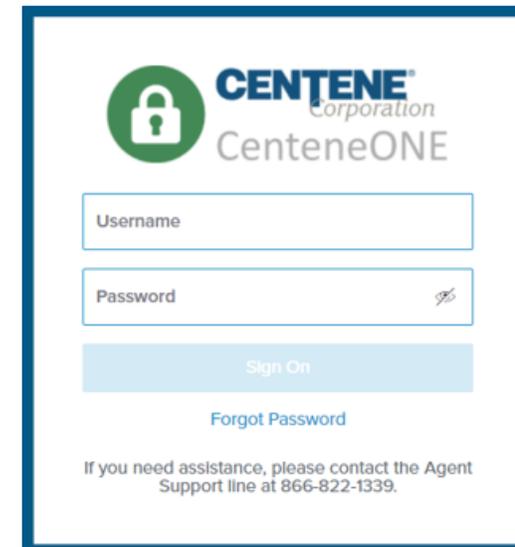
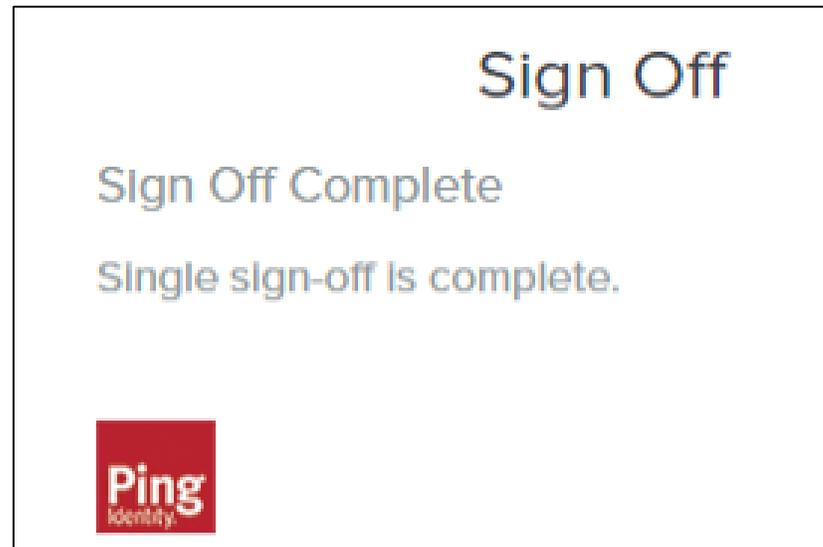
Single Sign-On Portal (SSO)

NAVIGATING IN YOUR SINGLE SIGN-ON PORTAL

Notice also, in the **Account Info** section, the dropdown reveals both **Help** and **Sign Off** options.



When you select **Sign Off**, the following informational prompt will appear and then the **Log In** screen will appear again.



Note: You will need to authenticate every time you log in from this point forward.

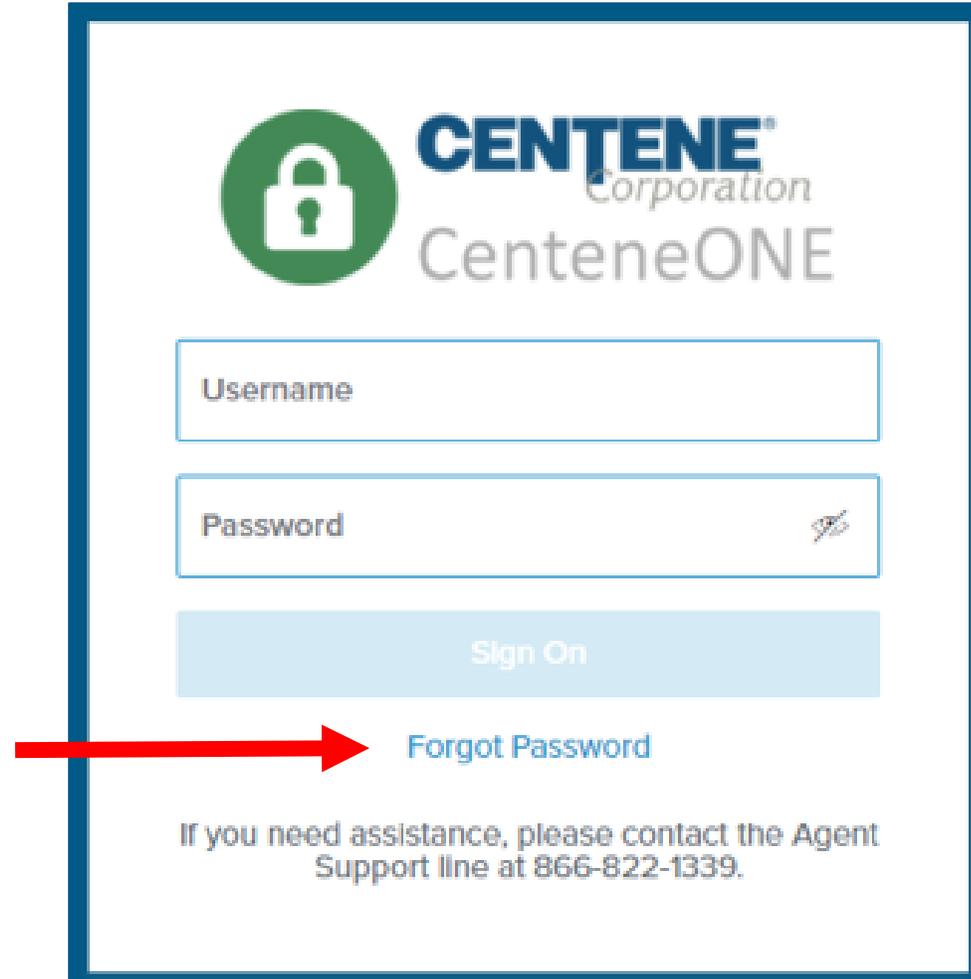
Single Sign-On Portal (SSO)

FORGOTTEN PASSWORD / PASSWORD RESET

Step 1: If you have:

- forgotten your password
- need to reset it, or
- never received log-in credentials,

select the **Forgot Password** link near the bottom of the **Log In** screen.



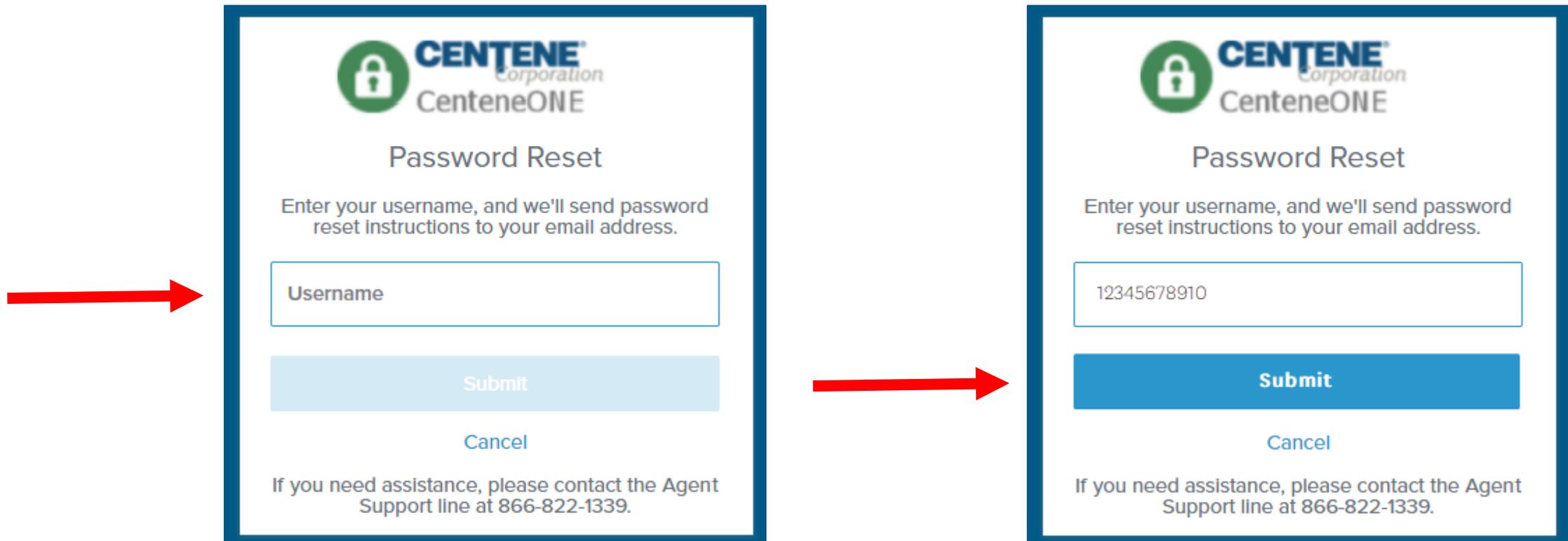
The screenshot shows the CenteneONE login interface. At the top left is a green padlock icon. To its right is the text 'CENTENE Corporation' in blue and grey, with 'CenteneONE' in grey below it. Below the logo are two input fields: 'Username' and 'Password'. The 'Password' field has a small eye icon on the right. Below these fields is a light blue 'Sign On' button. At the bottom of the form area, there is a blue link labeled 'Forgot Password'. A red arrow points from the left towards this link. Below the link, there is a line of text: 'If you need assistance, please contact the Agent Support line at 866-822-1339.'

Single Sign-On Portal (SSO)

FORGOTTEN PASSWORD / PASSWORD RESET

Step 2: The **Password Reset** screen will appear. Type your username (NPN) in the **Username** field. The **Submit** button will become active.

Select the **Submit** button.



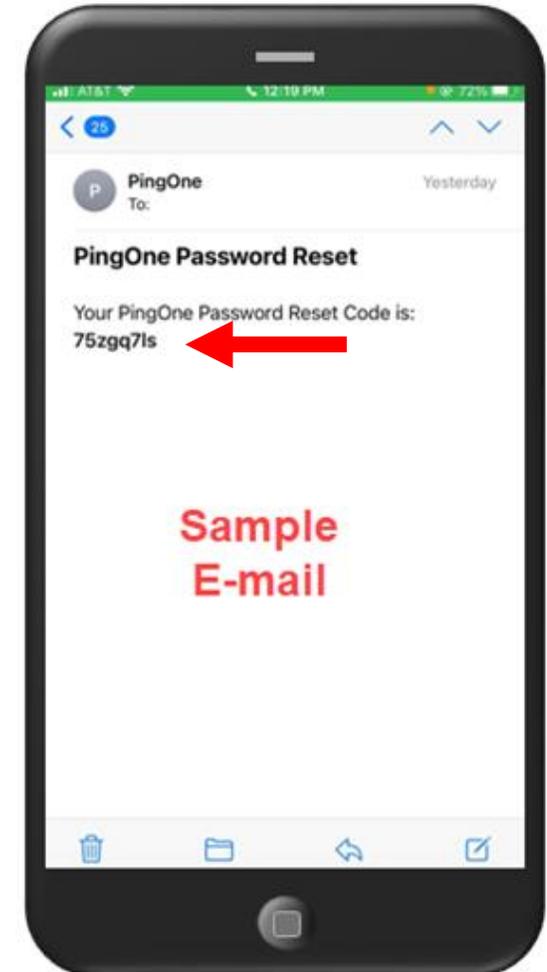
Single Sign-On Portal (SSO)

FORGOTTEN PASSWORD / PASSWORD RESET

Step 3: The **Enter New Password** screen will appear.

You will receive a password reset email. Retrieve the reset code from the email.

If you didn't get an email, you can select the **Didn't receive an email? Resend** link and another email will generate.



Single Sign-On Portal (SSO)

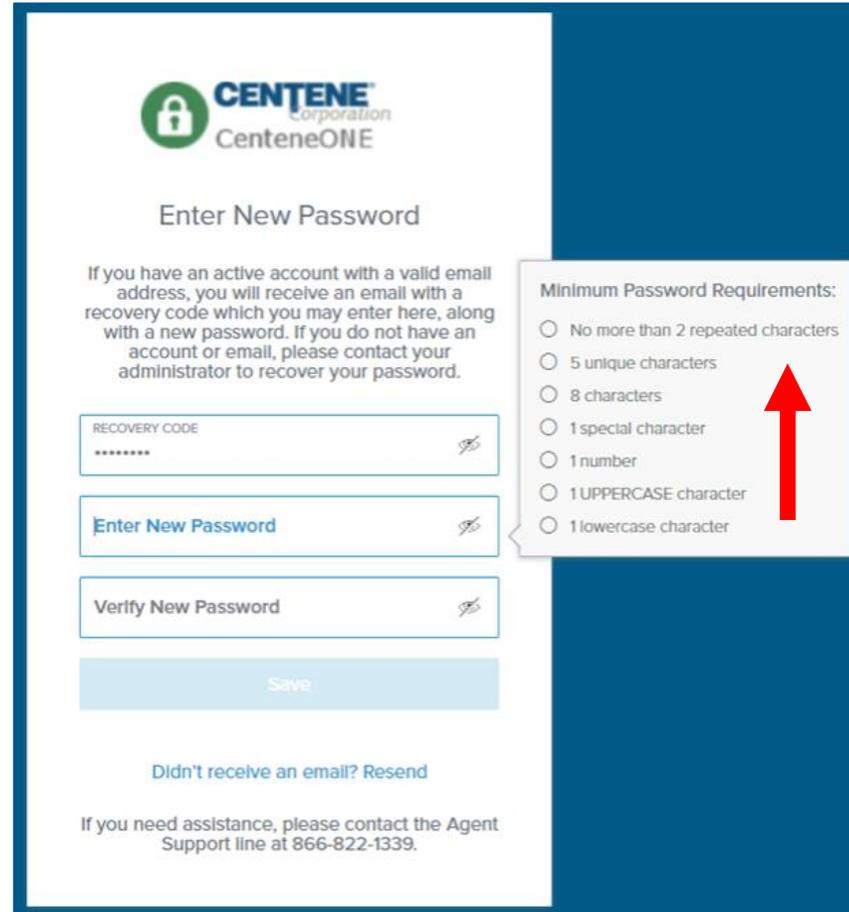
FORGOTTEN PASSWORD / PASSWORD RESET

Step 4: Enter the password reset code from the email in the **Recovery Code** field.

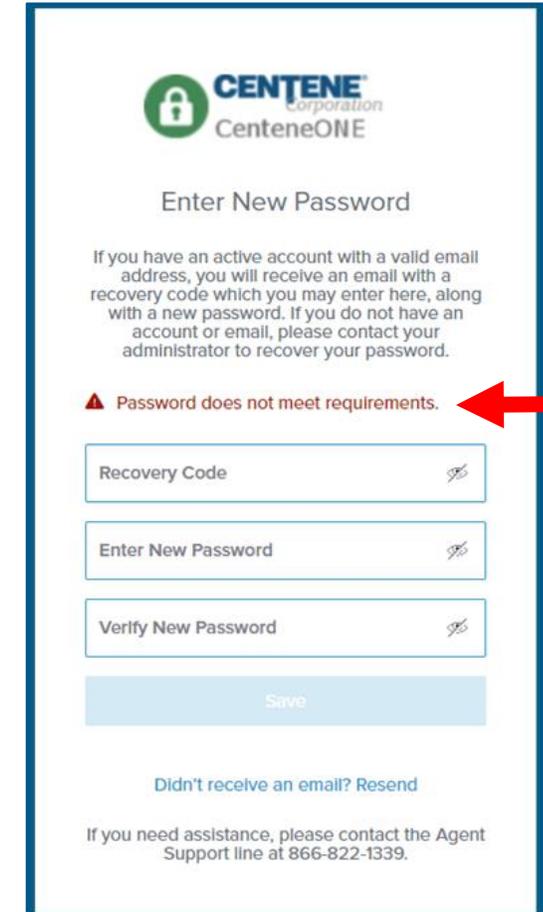
Create and enter a password that has never been used before (that meets the minimum password requirements) in the **Enter New Password** and **Verify New Password** fields.

If the password has been used or does not meet the minimum requirements, a **Password does not meet requirements** error will appear.

Adjust your new password to meet the requirements.



The screenshot shows the 'Enter New Password' page for CenteneONE. It includes a recovery code field, 'Enter New Password' and 'Verify New Password' fields, and a 'Save' button. A tooltip titled 'Minimum Password Requirements:' is overlaid on the 'Enter New Password' field, listing requirements: No more than 2 repeated characters, 5 unique characters, 8 characters, 1 special character, 1 number, 1 UPPERCASE character, and 1 lowercase character. A red arrow points to the tooltip.



The screenshot shows the 'Enter New Password' page with an error message: 'Password does not meet requirements.' A red arrow points to this message. The page layout is identical to the previous screenshot, but the password requirements tooltip is absent.

Single Sign-On Portal (SSO)

FORGOTTEN PASSWORD / PASSWORD RESET

Step 5: When the new password has been entered successfully, select the activated **Save** button.

CENTENE
Corporation
CenteneONE

Enter New Password

If you have an active account with a valid email address, you will receive an email with a recovery code which you may enter here, along with a new password. If you do not have an account or email, please contact your administrator to recover your password.

RECOVERY CODE

NEW PASSWORD
●●●●●●●●

VERIFY NEW PASSWORD
●●●●●●●●

Save

Didn't receive an email? Resend

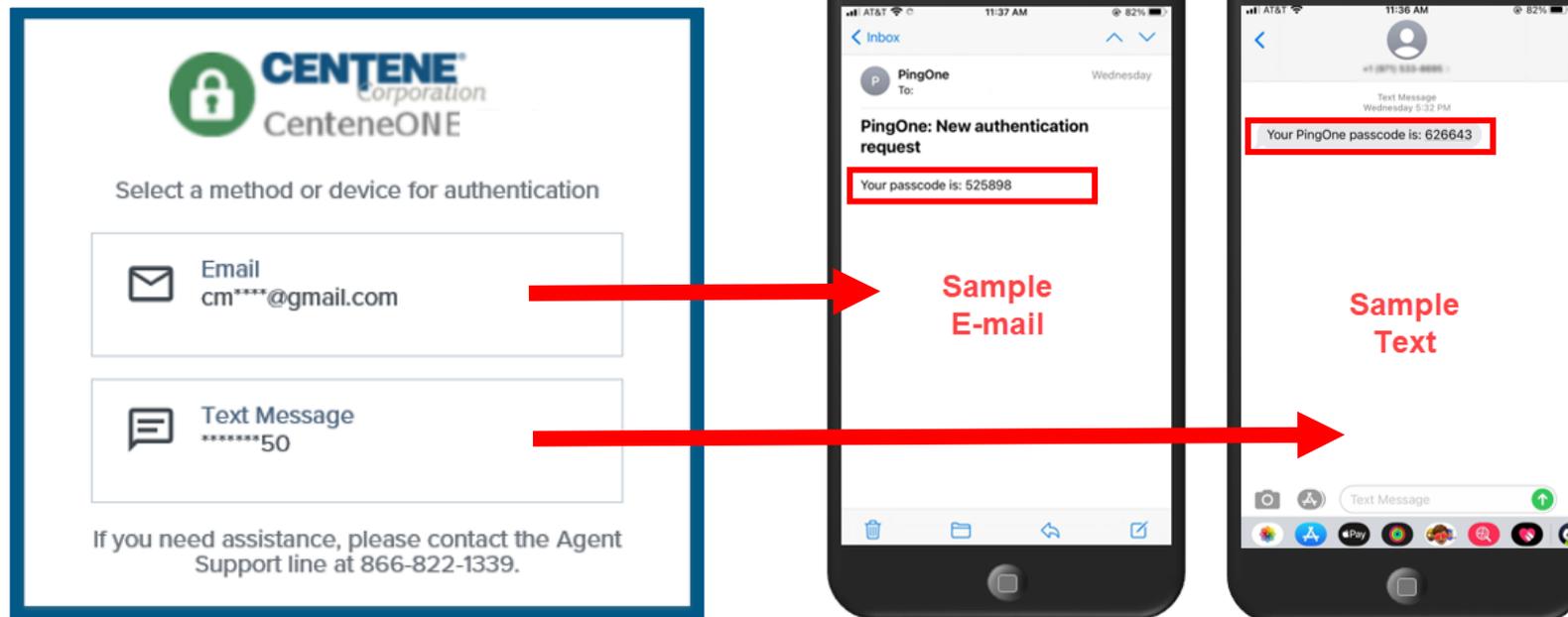
If you need assistance, please contact the Agent Support line at 866-822-1339.

Single Sign-On Portal (SSO)

FORGOTTEN PASSWORD / PASSWORD RESET

Step 6: The authentication process will occur. If you only have an email on file, a code will be sent to your email and you will advance to an authentication code entry screen. If you have both an email and a cell phone number on file, an authentication option screen will appear.

Select the **Email** option or the **Text Message** option, based on your preference. (Selecting **Text Message** will text an authentication code to the cell phone number on file. Selecting **Email** will email the code to the email address on file.)



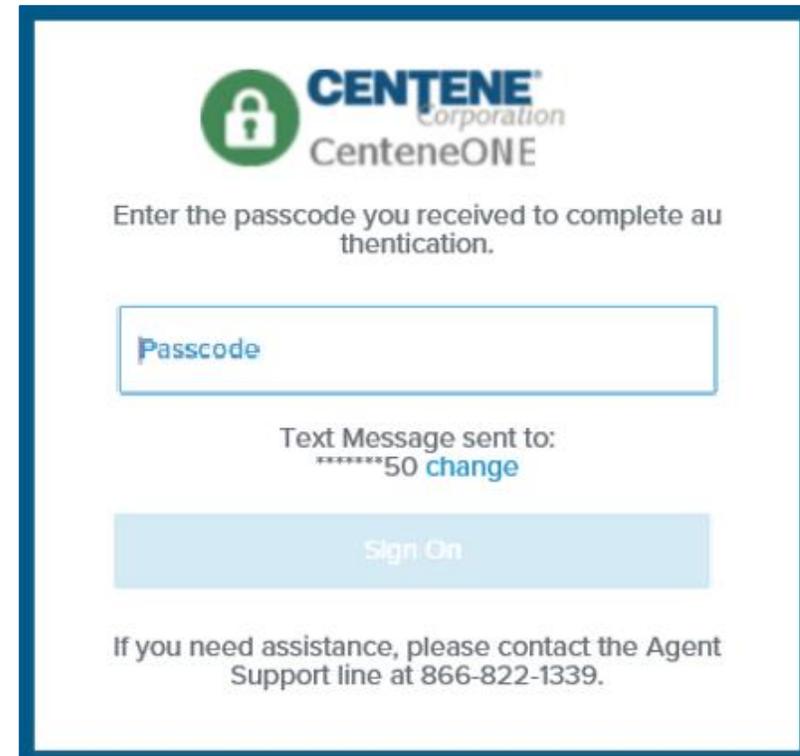
Single Sign-On Portal (SSO)

FORGOTTEN PASSWORD / PASSWORD RESET

Step 7: When the authentication code entry screen appears, type the code you received via email or text in the **Passcode** field. (Notice that the screen will tell you where the passcode was sent to, in case you cannot locate it.)



The screenshot shows the SSO portal authentication screen for email delivery. At the top is the CENTENE Corporation CenteneONE logo. Below the logo is the instruction: "Enter the passcode you received to complete authentication." A text input field labeled "Passcode" is provided. Below the field, it says "Email sent to: cm****@gmail.com". A light blue "Sign On" button is at the bottom. At the very bottom, it says "If you need assistance, please contact the Agent Support line at 866-822-1339."



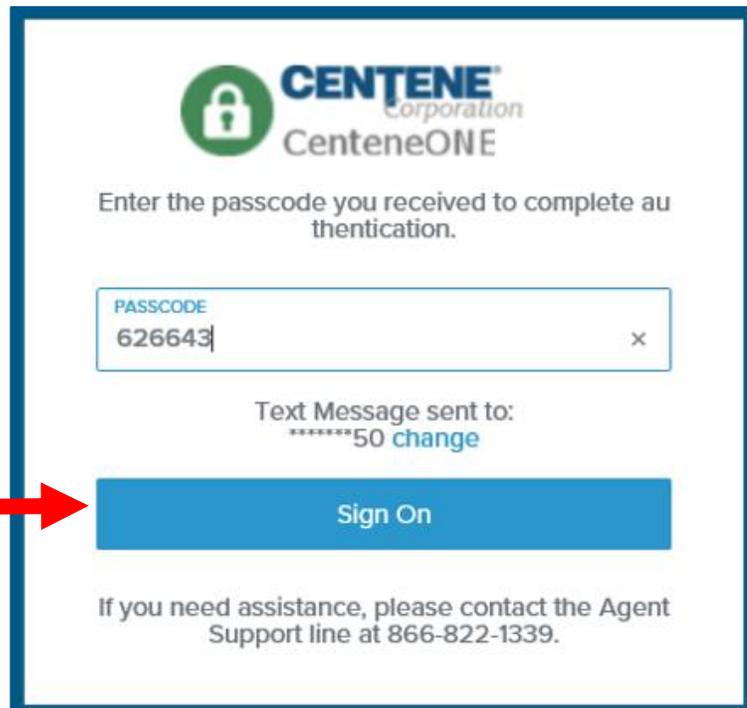
The screenshot shows the SSO portal authentication screen for text message delivery. At the top is the CENTENE Corporation CenteneONE logo. Below the logo is the instruction: "Enter the passcode you received to complete authentication." A text input field labeled "Passcode" is provided. Below the field, it says "Text Message sent to: *****50 change". A light blue "Sign On" button is at the bottom. At the very bottom, it says "If you need assistance, please contact the Agent Support line at 866-822-1339."

Single Sign-On Portal (SSO)

FORGOTTEN PASSWORD / PASSWORD RESET

Step 8: When you have populated the authentication code in the **Passcode** field, the **Sign On** button will become active.

Select the **Sign On** button.

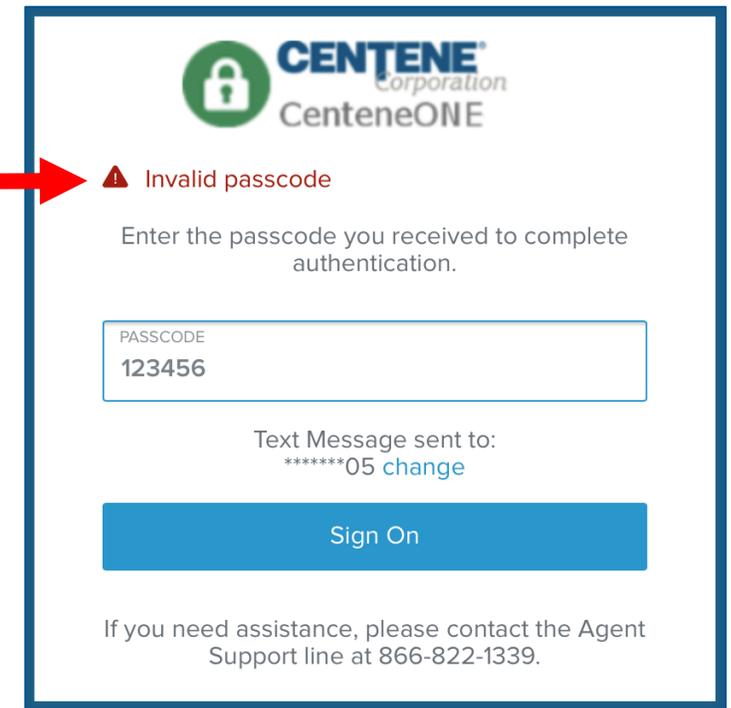


The screenshot shows the SSO portal interface. At the top is the CENTENE Corporation CenteneONE logo. Below it, the text reads "Enter the passcode you received to complete authentication." There is a text input field labeled "PASSCODE" containing the value "626643". Below the input field, it says "Text Message sent to: *****50 change". A blue "Sign On" button is visible, with a red arrow pointing to it from the left. At the bottom, there is a note: "If you need assistance, please contact the Agent Support line at 866-822-1339."



*(If you entered the wrong code, the **Invalid passcode** error will appear.*

*Correct the code, and select the **Sign On** button.)*

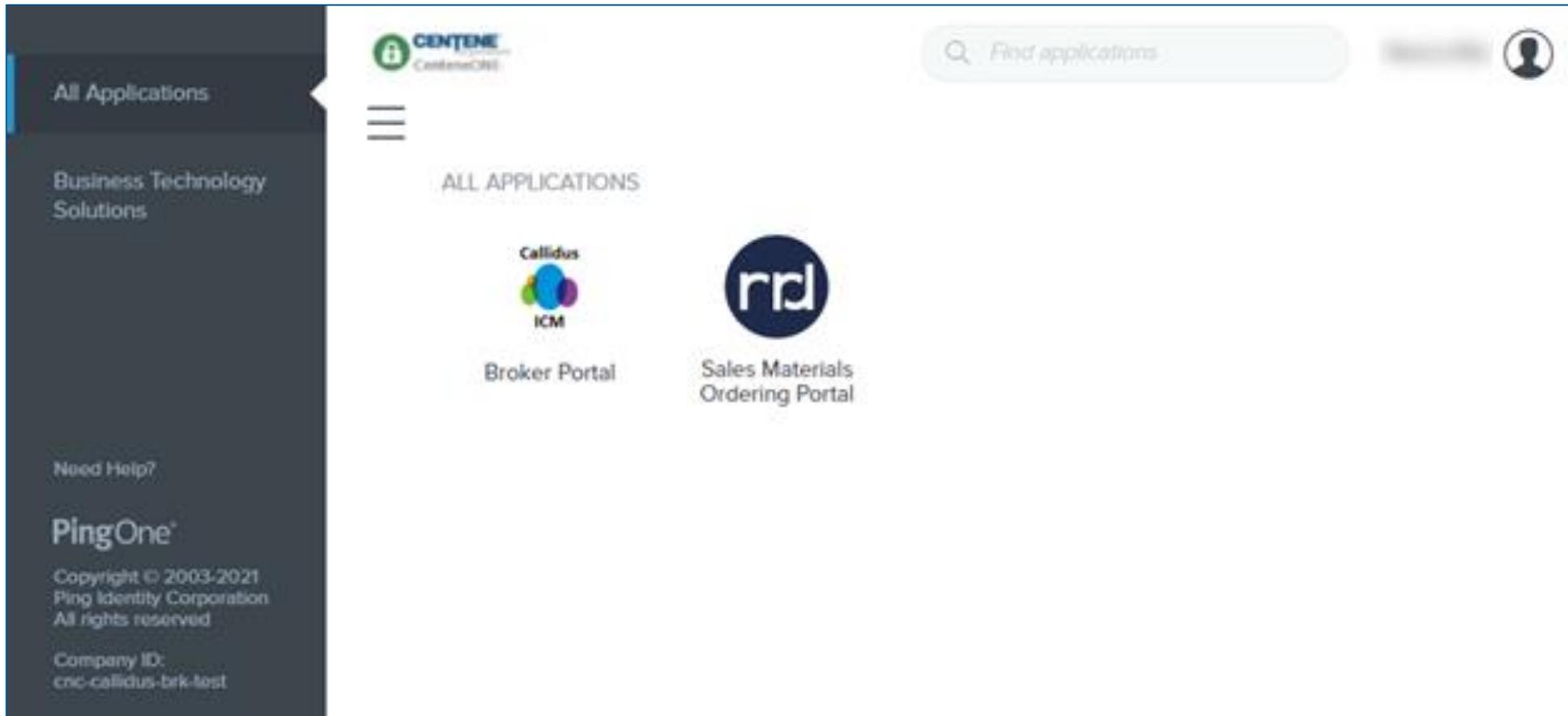


The screenshot shows the SSO portal interface after an error. At the top is the CENTENE Corporation CenteneONE logo. Below it, the text reads "Enter the passcode you received to complete authentication." There is a text input field labeled "PASSCODE" containing the value "123456". Below the input field, it says "Text Message sent to: *****05 change". A blue "Sign On" button is visible. A red arrow points from the left to a red warning icon (a triangle with an exclamation mark) and the text "Invalid passcode" above the button. At the bottom, there is a note: "If you need assistance, please contact the Agent Support line at 866-822-1339."

Single Sign-On Portal (SSO)

FORGOTTEN PASSWORD / PASSWORD RESET

Successful sign on will route you to the Single Sign-On Portal.



Single Sign-On Portal (SSO)

AGENT CONNECT LOGIN & SWITCH CAPABILITY TO VIEW AS AGENCY PRINCIPAL

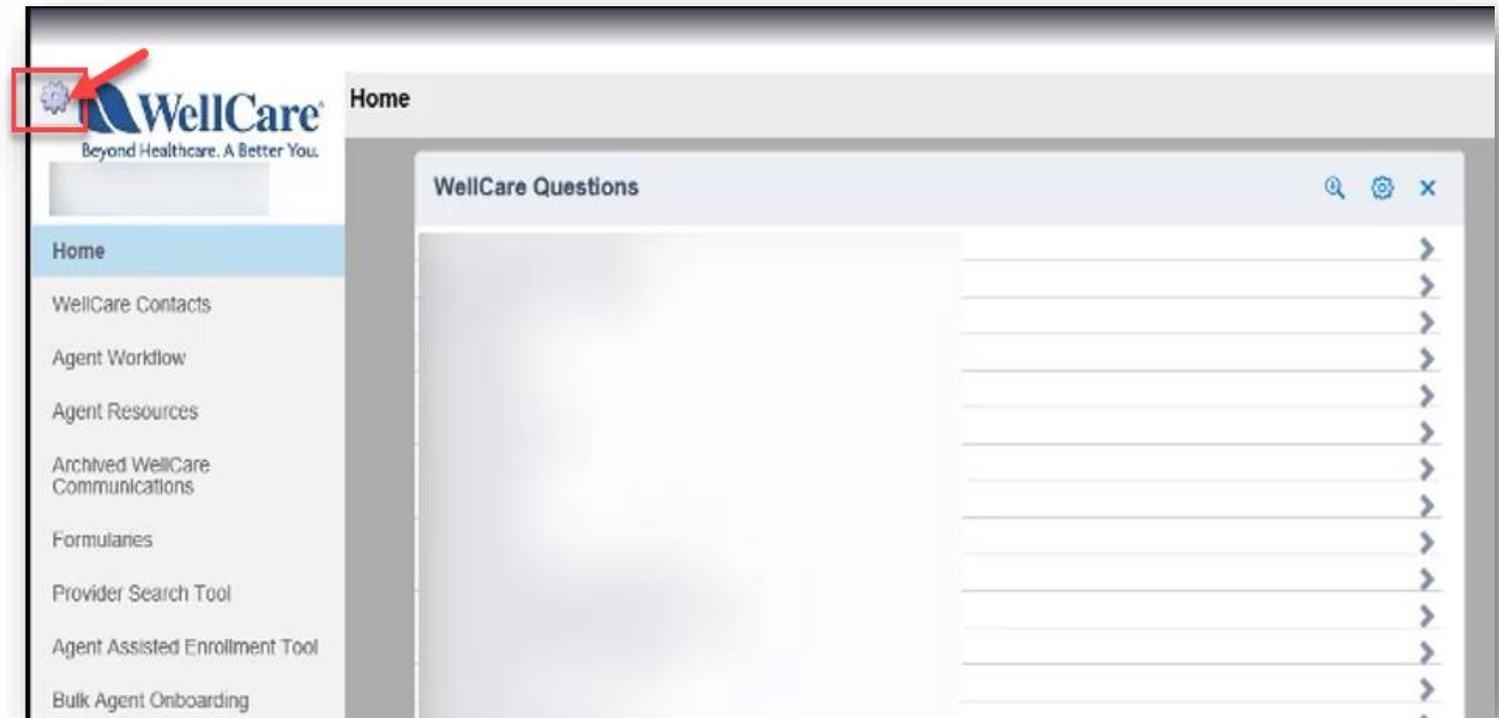
Principal brokers who own Agencies have the ability to switch views between the two broker portals without logging out and relogging in.

This is helpful when locating Commission Statements and Book of Business, which are likely to be found in the Agency portal.

Step 1: To switch portal views, click the gear icon in the upper left-hand corner of the screen.



NOTE: Only Principal brokers have this ability. Downline brokers do not.



Single Sign-On Portal (SSO)

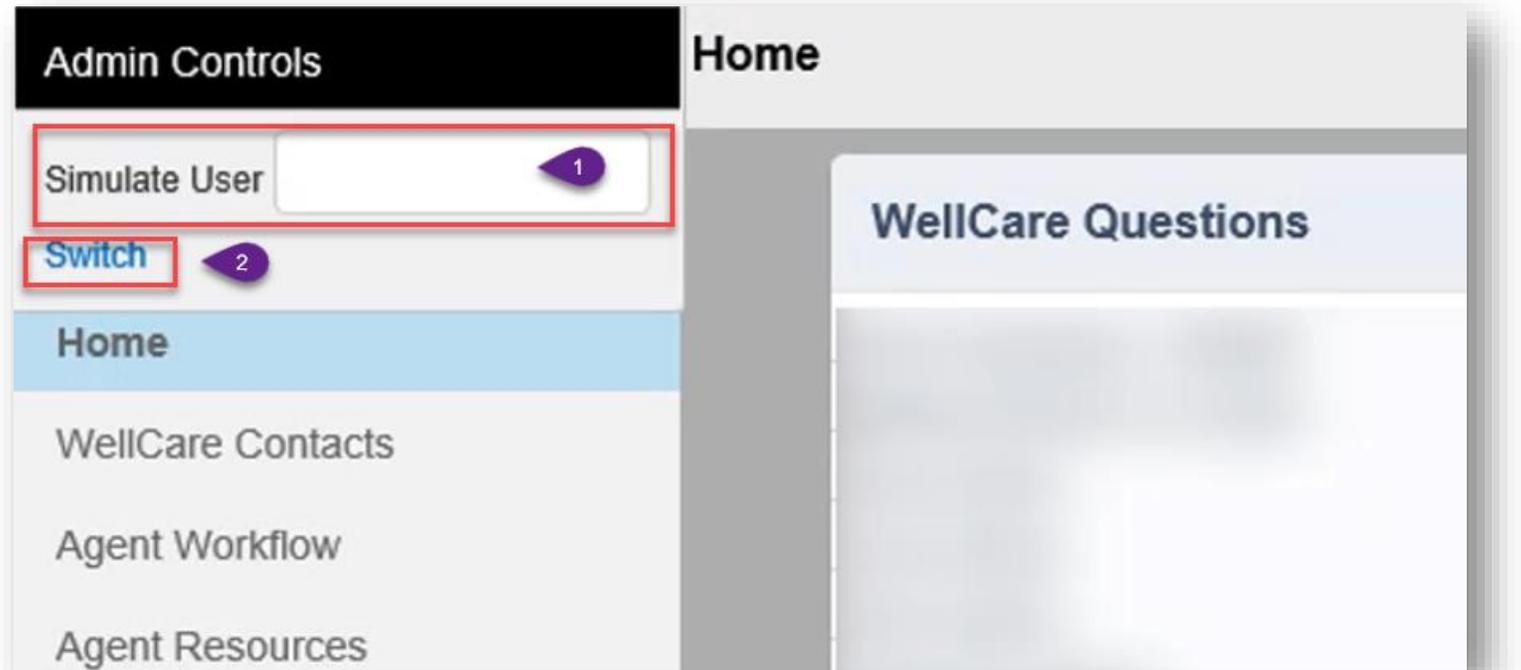
AGENT CONNECT LOGIN & SWITCH CAPABILITY TO VIEW AS AGENCY PRINCIPAL

Step 2: In the **Simulate User** field, enter your personal or Agency Producer ID. Then click **Switch** to access the new portal.

Now you can make changes and access tickets and information in the correct portal.



NOTE: Only principal brokers have this ability. Downline brokers do not.

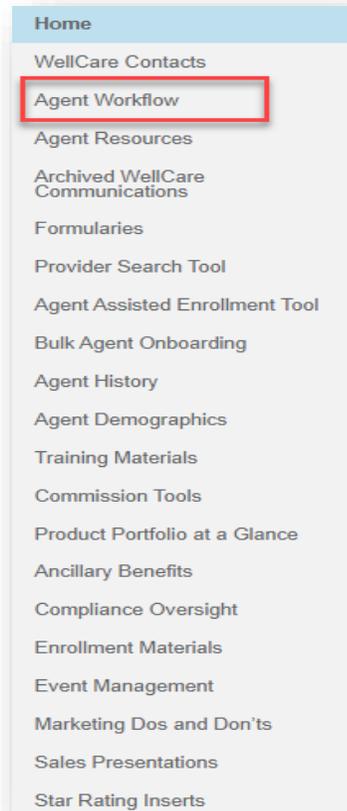


Single Sign-On Portal (SSO)

LOGIN TO AGENT WORKFLOW

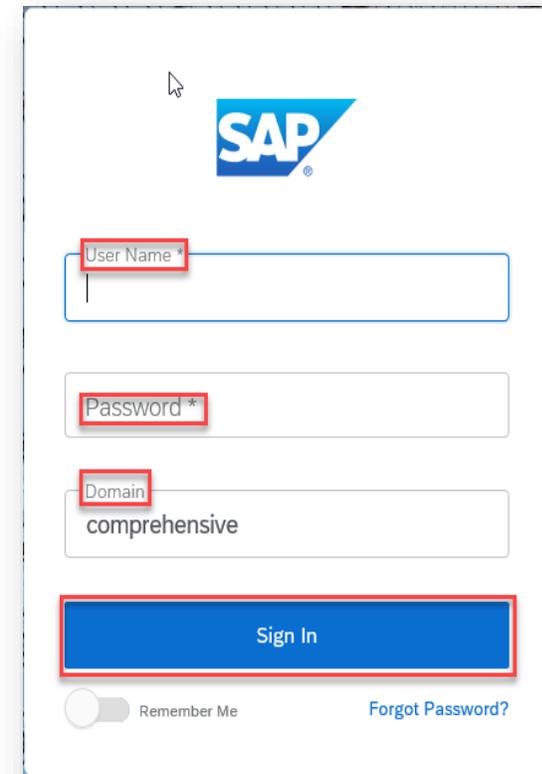
Login to Agent Workflow from your portal homepage with your Login name (email) and initial temporary password to make changes to your broker profile.

Step 1: Select **Agent Workflow** from the left menu within your Agent Connect profile.



Step 2: Once you have reached the login page, enter your login credentials and click **Submit**.

 **NOTE:** Domain name is **COMPREHENSIVE**

A login form with the SAP logo at the top. It contains three input fields: 'User Name *', 'Password *', and 'Domain' (with the text 'comprehensive' entered). Below the fields is a blue 'Sign In' button. At the bottom, there is a 'Remember Me' checkbox and a 'Forgot Password?' link.

Single Sign-On Portal (SSO)

LOGIN TO AGENT WORKFLOW

Step 3: Complete the asterisked fields and click **Change Password**. You will then be redirected to your homepage.



The screenshot shows a web form for changing a password. At the top, a light blue box contains a red arrow pointing to the instructions and an information icon. The instructions are:

- Please set a new password. Your password must be changed to protect the integrity of your account.
- Password must contain Letters and numbers
- Password must have more than 8 characters.
- Password must have less than 20 characters.

Below the instructions are two input fields: "New Password *" and "Confirm Password *". At the bottom of the form, there are two buttons: "Change Password" (highlighted with a red and yellow border) and "Log Off".



AGENT CONNECT USER GUIDE

AGENT MATERIALS

ENROLLMENT MATERIALS

LOCATING ENROLLMENT FORMS AND OTHER MATERIALS IN AGENT CONNECT

There are many Enrollment forms and other marketing materials you can find in Agent Connect for instant download and availability. Other materials can be ordered through **Custom Point**.

You can access these documents in Agent Connect by clicking on **Enrollment Materials** on the left menu.

Just a few examples of the Enrollment materials available in Agent Connect:

- MA/MAPD & PDP Paper Enrollment Applications
- SOA Form
- DocuSign various Enrollment Applications & SOA forms
- Summary of Benefits
- Enrollment Resource Guide
- CSNP Form (English, Korean, Spanish)
- And more!

Home

Agent Information

WellCare Contacts

Agent Workflow

Agent Resources

Archived WellCare Communications

Formularies

Provider Search Tool

Agent Assisted Enrollment Tool

Bulk Agent Onboarding

Agent History

Agent Demographics

Training Materials

Commission Tools

Compliance Oversight

Enrollment Materials 

Event Management

Marketing Dos and Don'ts

Agents First Look

Quick Start Guide

Sales Presentations

Star Rating Inserts

TRAINING MATERIALS

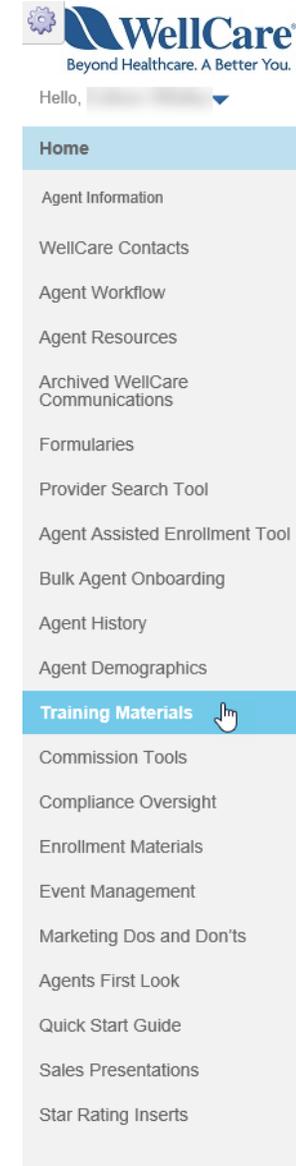
LOCATING TRAINING DOCUMENTS AND OTHER USEFUL GUIDES IN AGENT CONNECT

There are many training documents and other informative guides you can find in Agent Connect for instant download and availability.

You can access these documents in Agent Connect by clicking on **Training Materials** on the left menu.

Just a few examples of the Training Materials available in Agent Connect:

- Annual Certification Training PDF
- Agent Connect User Guide
- Hierarchy Onboarding Training Guide (English, Spanish)
- And more!





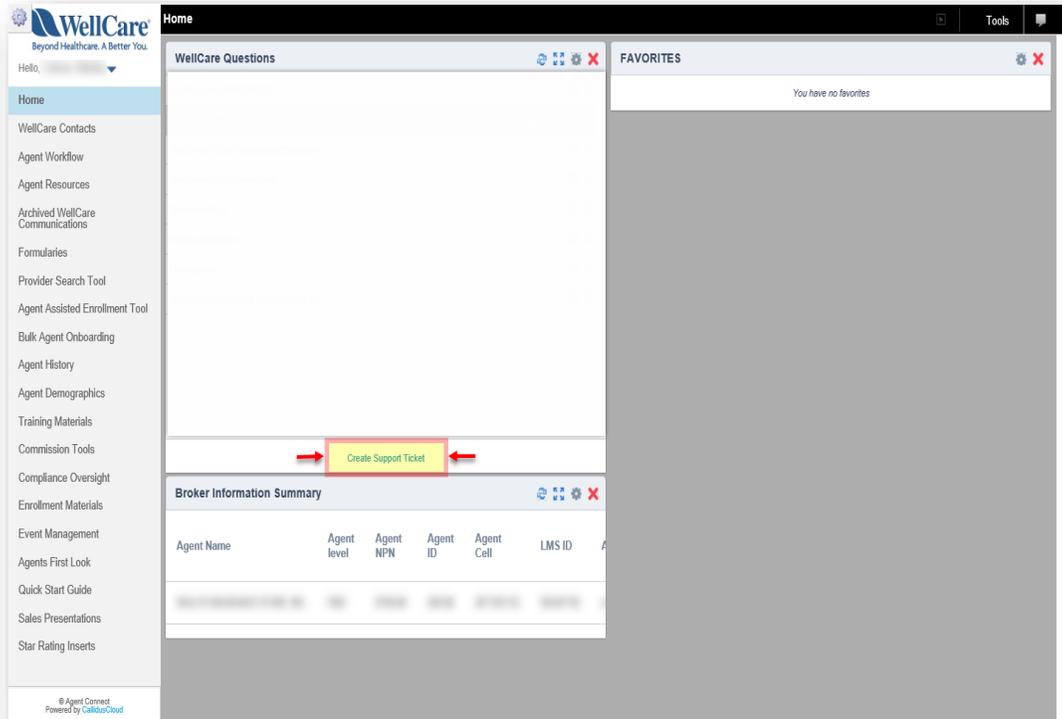
AGENT CONNECT USER GUIDE

CREATING SUPPORT TICKETS

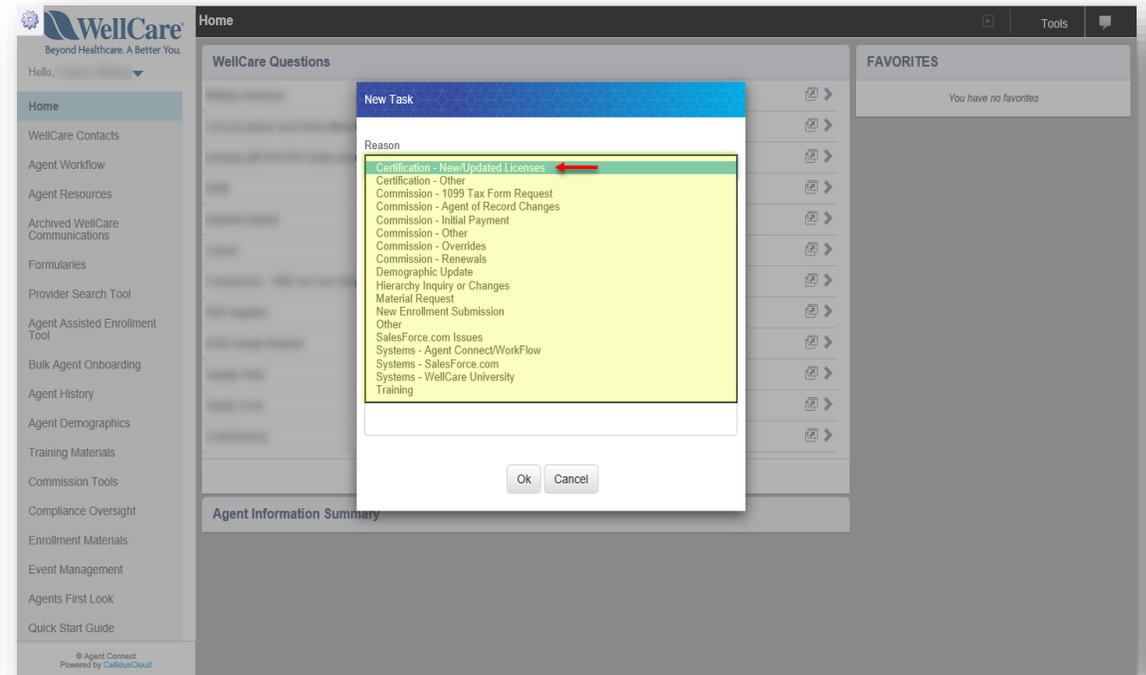
CREATING SUPPORT TICKETS

CREATING SUPPORT TICKET IN AGENT CONNECT PORTAL

Step 1: Click **Create Support Ticket** in your WellCare Questions widget.



Step 2: Once the window populates, select a topic that best relates to your inquiry from the drop-down menu. Click **OK**.



CREATING SUPPORT TICKETS

CREATING SUPPORT TICKET IN AGENT CONNECT PORTAL

To attach a file to a ticket after submission, take the following steps:

Step 1: Click the **boxed arrow** symbol to the right of the subject line, after you have submitted the ticket →

Step 2: Next, click on the ticket **Subject**. This is a hyperlink and will open to full ticket view as shown on the right →



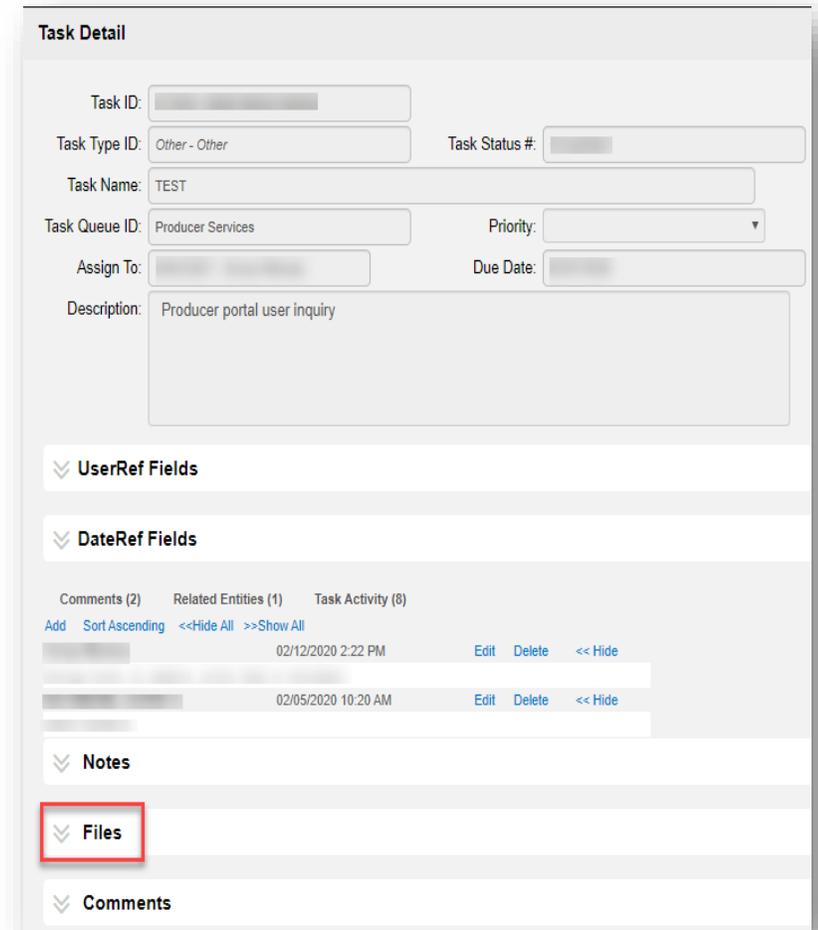
Step 3: A new window with your previously submitted ticket will open. Scroll to the bottom of the window, and click the arrows to the left of the word **Files**

Step 4: Click **Attach File**



Step 5: Click **Choose File** and select the file on your computer that you wish to upload and attach to ticket.

Step 6: Click **Save**

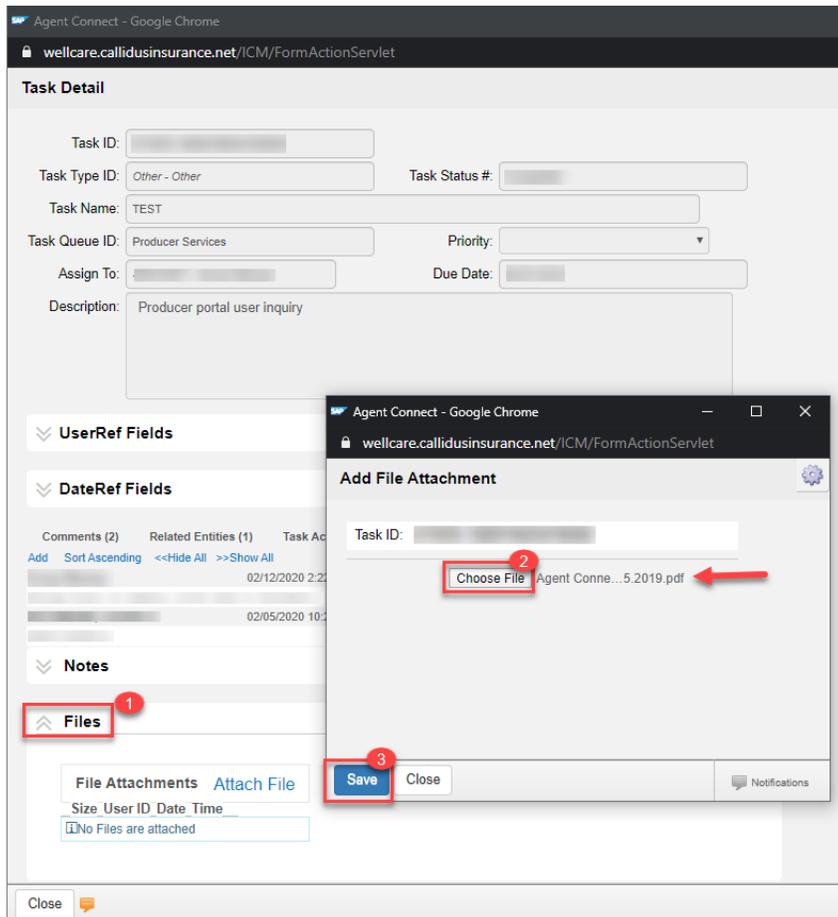


CREATING SUPPORT TICKETS

ATTACHING FILE TO SUPPORT TICKET

To attach a file to a ticket after submission, take the following steps (continued)

Step 7: The attached file will reflect under **File Attachments** in the **Files section** of the ticket. Click **Close** to return to your homepage.

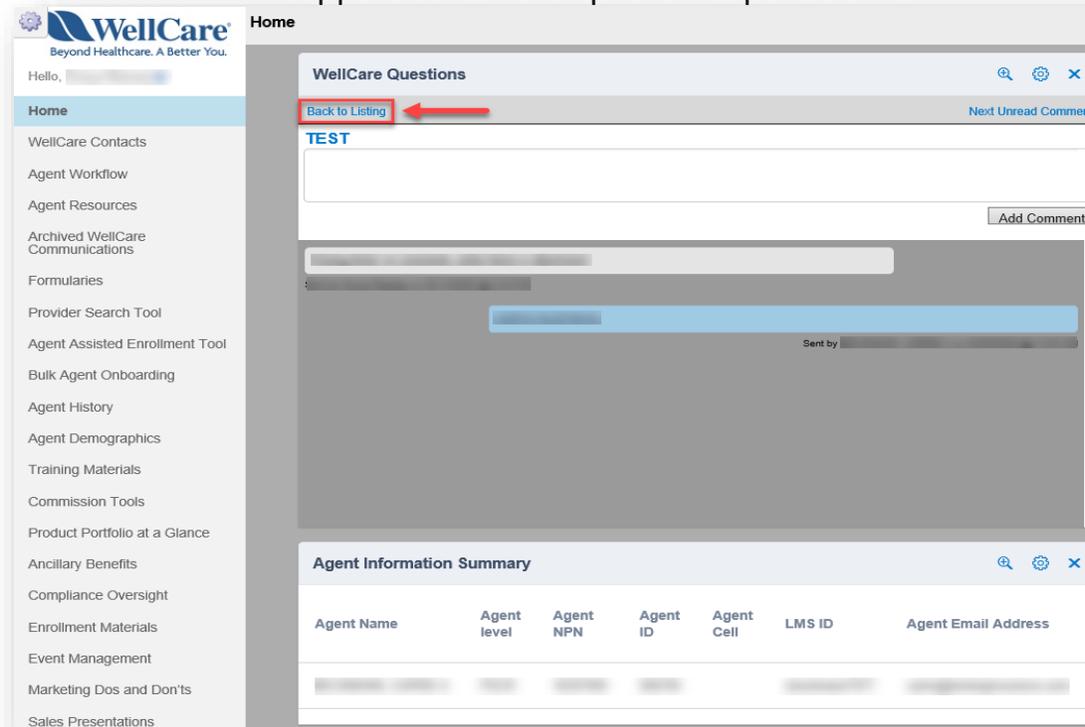


CREATING SUPPORT TICKETS

MONITORING SALES SUPPORT RESPONSE TO YOUR TICKET

- Once Sales Support has responded to your ticket, the ticket Subject will appear in **BOLD** font.
- Click the  symbol to open and review the ticket response.
- If you have additional comments to this inquiry, you can reply back to Sales Support by typing your comments in the text box and select **Add Comment**.
 - It is best practice for each NEW issue, please create a **NEW** support ticket for a quicker response time.

To return to the Home page for your ticket history, click the **Back to Listing** link at the top of the screen.



The screenshot displays the WellCare agent portal. On the left is a navigation menu with the WellCare logo and tagline "Beyond Healthcare. A Better You." The menu items include: Home, WellCare Contacts, Agent Workflow, Agent Resources, Archived WellCare Communications, Formularies, Provider Search Tool, Agent Assisted Enrollment Tool, Bulk Agent Onboarding, Agent History, Agent Demographics, Training Materials, Commission Tools, Product Portfolio at a Glance, Ancillary Benefits, Compliance Oversight, Enrollment Materials, Event Management, Marketing Dos and Don'ts, and Sales Presentations. The main content area is titled "WellCare Questions" and shows a ticket with the subject "TEST". A red box highlights the "Back to Listing" link at the top left of the ticket view, with a red arrow pointing to it. Other elements include a "Next Unread Comment" link, an "Add Comment" button, and an "Agent Information Summary" table below the ticket details.

Agent Name	Agent level	Agent NPN	Agent ID	Agent Cell	LMS ID	Agent Email Address



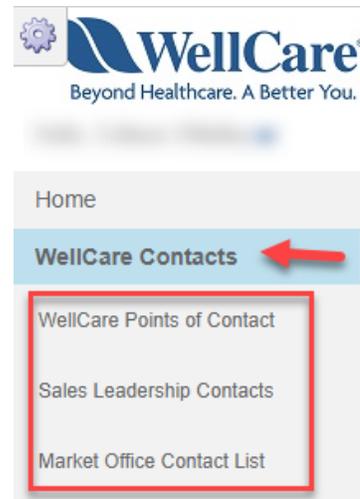
AGENT CONNECT USER GUIDE

IMPORTANT CONTACTS

IMPORTANT CONTACTS

WELLCARE CONTACTS AND RESOURCES

Login to Agent Connect, select **WellCare Contacts** located on the left menu. Then select **WellCare Points of Contact** to view list.



This is a 3 page PDF document that you can download for quick reference!

WellCare Contacts and Resources

Contact Point	Purpose	Contact Information
Applications and Enrollment		
Telephonic Scope of Appointment (SOA)	Document SOA via phone	MAPD: 877-780-3920 PDP: 877-297-3625
Medicaid Eligibility	Verify Medicaid eligibility	866-211-0544
Online Formulary Tool	Utilize during sales presentations	https://www.wellcare.com/Producers/Formularies
Online Provider Directory	Utilize during sales presentations	https://www.wellcare.com/FAP
Online Application Submission	Submit electronic enrollment applications	https://portal.wellcare.com/agentassistedapp
Paper Application Fax Submission	Submit paper enrollment applications	MAPD: 866-473-9124 PDP: 866-388-1521
RFI Line (Request for Information)	Application assistance	MAPD: 877-677-5609 PDP: 877-677-5608
Disenrollment Processing	Member disenrolls from a plan	Fax: 866-430-7452
Sales Support		
Agent Services	Telephonic assistance regarding certifications, commissions, etc.	866-822-1339
Payspan	Register for Direct Deposit	877-331-7154



IMPORTANT CONTACTS

SALES LEADERSHIP CONTACTS

Login to Agent Connect, select **WellCare Contacts** located on the left menu. Then select **Sales Leadership Contacts** to view list by regions.



Regional Sales Leadership



This is a 9 page PDF document that you can download for quick reference!



AGENT CONNECT USER GUIDE

MEMBER APPLICATION TRACKING

MEMBER APPLICATION TRACKING

TRACKING NEW MEMBER APPLICATION SUBMISSION USING APPLICATION SEARCH TOOL

The Application Search Tool is designed to assist the broker with tracking their Member application submissions through the various stages. It is recommended that you use this essential tool frequently to ensure your members receive the coverage they need without delay.

Step 1: From the left menu, click **Agent History**. Then select **Application Search Tool** from the sub-menu

Step 2: Use the fields at the top of the screen to narrow your application search criteria. Enter your search terms and then click **Search**

The screenshot shows the WellCare Application Search Tool interface. The left sidebar menu has 'Agent History' and 'Application Search Tool' highlighted. The main area contains search filters for SignatureDate, Application Status, Producer ID, Member Name, Plan ID, Effective Date, and ApplicationID. A 'Search' button is visible below the filters. Below the filters is a table with columns: Producer Name, Producer ID, ApplicationID, Member Name, Plan ID, Application Status, RFI Description, SignatureDate, and Effective Date.

MEMBER APPLICATION TRACKING

TRACKING MEMBER APPLICATION SUBMISSION USING APPLICATION SEARCH TOOL (continued)

The application information is displayed.

The **Application Status** indicates the application's current stage/status.

Examples: Approved, Pending Review, Terminated, RFI etc.

Producer Name	Producer ID	ApplicationID	Member Name	Plan ID	Application Status	RFI Description	SignatureDate	Effective Date
					Pending Review		06/12/2020	07/01/2020
					RFI	RFI - HICN Not Found	06/11/2020	07/01/2020
					Future Enroll		06/08/2020	07/01/2020
					Future Enroll		06/02/2020	08/01/2020
					Future Enroll		06/01/2020	07/01/2020
					Enrolled-Active		05/28/2020	06/01/2020
					Enrolled-Active		05/26/2020	06/01/2020
					Future Enroll		05/26/2020	07/01/2020
					Enrolled-Active		05/16/2020	06/01/2020
					Future Enroll		05/15/2020	07/01/2020
					Future Enroll		05/12/2020	07/01/2020
					Future Enroll		05/12/2020	07/01/2020
					Enrolled-Active		05/01/2020	06/01/2020
					Enrolled-Active	RFI - HICN Not Found	04/28/2020	06/01/2020
					Enrolled-Active		04/28/2020	05/01/2020
					Pending Review		04/28/2020	06/01/2020
					Future Enroll		04/23/2020	07/01/2020
					Enrolled-Active		04/23/2020	06/01/2020
					Future Enroll		04/23/2020	07/01/2020
					Enrolled-Active		04/22/2020	05/01/2020

MEMBER APPLICATION TRACKING

LOCATING & RESOLVING MEMBER APPLICATION THAT IS IN RFI STATUS

An **RFI** (Request for Information) application status indicates there is an error on the application that needs to be corrected.

Step 1: To search for all applications that may have RFI status, in the **Application Status** field, select **RFI** on the drop-down list.

Step 2: Click **Search**

Step 3: Click on the member line you wish to view, this will open the **Customer Application Detail** screen.

The screenshot shows the WellCare Application Search Tool interface. The 'Application Status' dropdown menu is open, showing 'RFI' selected. The 'Search' button is highlighted. A table of application results is visible on the right.

Plan ID	Application Status	RFI Description	SignatureDate	Effective Date
	Pending Review		06/12/2020	07/01/2020
	RFI	RFI - HICN Not Found	06/11/2020	07/01/2020
	Future Enroll		06/08/2020	07/01/2020
	Future Enroll		06/02/2020	08/01/2020
	Future Enroll		06/01/2020	07/01/2020
	Enrolled-Active		05/28/2020	06/01/2020
	Enrolled-Active		05/26/2020	06/01/2020
	Future Enroll		05/26/2020	07/01/2020
	Enrolled-Active		05/16/2020	06/01/2020
	Future Enroll		05/15/2020	07/01/2020
	Future Enroll		05/12/2020	07/01/2020
	Future Enroll		05/12/2020	07/01/2020

MEMBER APPLICATION TRACKING

LOCATING & RESOLVING MEMBER APPLICATION THAT IS IN RFI STATUS (continued)

Step 4: Once on the Customer Application Detail screen, scroll down to the **RFI Description** section, view the RFI Description field, this will identify the reason the application is in RFI status.

Step 5: If you would like assistance with resolving the issue(s) for this member, **contact the Broker**
Support line: (866)-822-1339

NOTE: Once the member is **active in their plan (within the effective date)**, the member will appear in your **Book of Business**.



WellCare
Beyond Healthcare. A Better You.

Hello, [User Name]

Home
WellCare Contacts
Agent Workflow
Agent Resources
Archived WellCare Communications
Formularies
Provider Search Tool
Agent Assisted Enrollment Tool
Bulk Agent Onboarding
Agent History
Statements
Payment History
Book of Business
Book of Business Extract
Application Search Tool
Customer Application Detail
Training History

Customer Application Detail

Name and Contact Information

First Name: [Field] Last Name: [Field]
AdrLine1: [Field] AdrLine2: [Field]
City: [Field] State: [Dropdown]
Zip: [Field]
Home Phone: [Field] Email: [Field]

Personal Information

Medicare ID: [Field] Applicant ID: [Field]

RFI Description

RFI Description: RFI - HICN Not Found

Files

Comments



AGENT CONNECT USER GUIDE

COMMISSIONS

COMMISSIONS

LOCATING & DOWNLOADING COMMISSION STATEMENTS

Within the Agent History tab in Agent Connect you have the ability to download your **Commission Statements**. Take the following steps to export:

Step 1: On left menu, click **Agent History**, then click the **Statements** sub-tab under the Agent History menu located on the left side of screen.

Click on the Statement hyperlink once you have verified which statement date you would like to view.

Step 2: A pop-up screen will appear upon clicking the Statement hyperlink. Click **Open** or **Save** to view and download the Statement for your records.

The screenshot displays the WellCare Agent Connect interface. On the left, the 'Agent History' menu is highlighted, with the 'Statements' sub-tab selected. The main content area shows a table of commission statements with columns for Member Effective Year, Member Effective Month, and Statement Date. A red arrow points to the 'Statement' hyperlink in the first row of the table. A red box highlights this hyperlink. Below the table, a pop-up dialog box from Internet Explorer asks 'What do you want to do with 15578704249570000.pdf?' and offers options: 'Open', 'Save', and 'Save as'. The 'Open' option is selected.

Member Effective Year	Member Effective Month	Statement Date	Statement
2020	5	05/26/2020	Statement
2020	4	04/21/2020	Statement
2020	3	03/24/2020	Statement
2020	3	03/23/2020	Statement
2020	2	03/03/2020	Statement

COMMISSIONS

DOWNLOADING STATEMENT EXTRACT

The Statement Extract function allows you to convert a PDF statement into an Excel document!

Step 1: On left menu, click **Agent History**, then click the **Statements** sub-tab under the Agent History menu located on the left side of screen.

Click on the row of the Statement you would like to extract.

WellCare
Beyond Healthcare. A Better You.

Hello, [User Name]

Statements

Member Effective Year: [Dropdown] Member Effective Month: [Dropdown]
Statement Date: [Text]

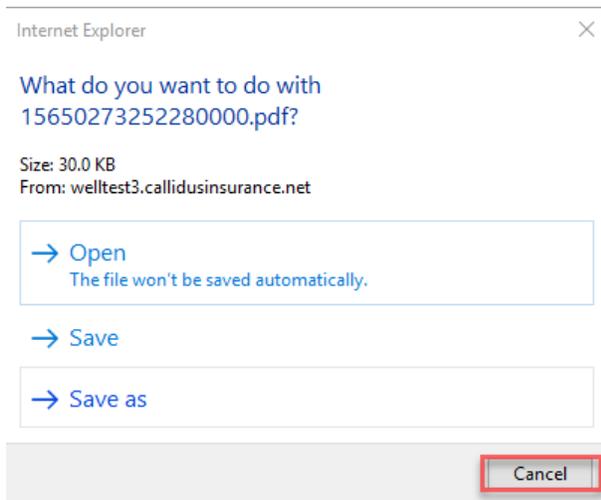
Search Clear

Member Effective Year	Member Effective Month	Statement Date	Statement
<input checked="" type="checkbox"/> 2019	7	08/05/2019	Statement
<input checked="" type="checkbox"/> 2019	7	07/25/2019	Statement
<input checked="" type="checkbox"/> 2019	7	07/22/2019	Statement
<input checked="" type="checkbox"/> 2019	7	07/15/2019	Statement
<input checked="" type="checkbox"/> 2019	7	07/08/2019	Statement
<input checked="" type="checkbox"/> 2019	6	07/01/2019	Statement
<input checked="" type="checkbox"/> 2019	6	06/25/2019	Statement
<input checked="" type="checkbox"/> 2019	6	06/18/2019	Statement
<input checked="" type="checkbox"/> 2019	6	06/11/2019	Statement
<input checked="" type="checkbox"/> 2019	5	06/03/2019	Statement
<input checked="" type="checkbox"/> 2019	5	05/28/2019	Statement
<input checked="" type="checkbox"/> 2019	5	05/20/2019	Statement
<input checked="" type="checkbox"/> 2019	5	05/14/2019	Statement
<input checked="" type="checkbox"/> 2019	4	05/07/2019	Statement
<input checked="" type="checkbox"/> 2019	4	04/27/2019	Statement
<input checked="" type="checkbox"/> 2019	4	04/22/2019	Statement
<input checked="" type="checkbox"/> 2019	4	04/16/2019	Statement
<input checked="" type="checkbox"/> 2019	4	04/10/2019	Statement
<input checked="" type="checkbox"/> 2019	4	04/02/2019	Statement
<input checked="" type="checkbox"/> 2019	3	03/27/2019	Statement
<input checked="" type="checkbox"/> 2019	3	03/20/2019	Statement
<input checked="" type="checkbox"/> 2019	3	03/13/2019	Statement
<input checked="" type="checkbox"/> 2019	3	03/05/2019	Statement
<input checked="" type="checkbox"/> 2019	2	02/26/2019	Statement
<input checked="" type="checkbox"/> 2019	2	02/19/2019	Statement

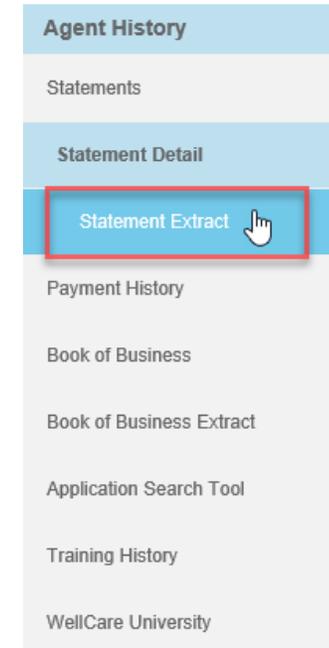
COMMISSIONS

DOWNLOADING STATEMENT EXTRACT

Step 2: A pop-up screen will appear upon clicking the Statement row. Click **Cancel**.



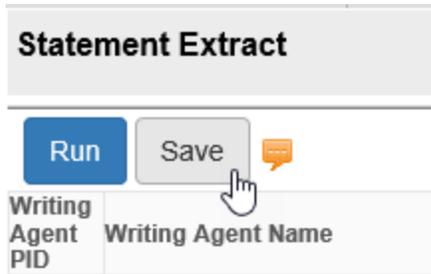
Step 3: A Statement Extract sub- tab will appear. Click **Statement Extract**.



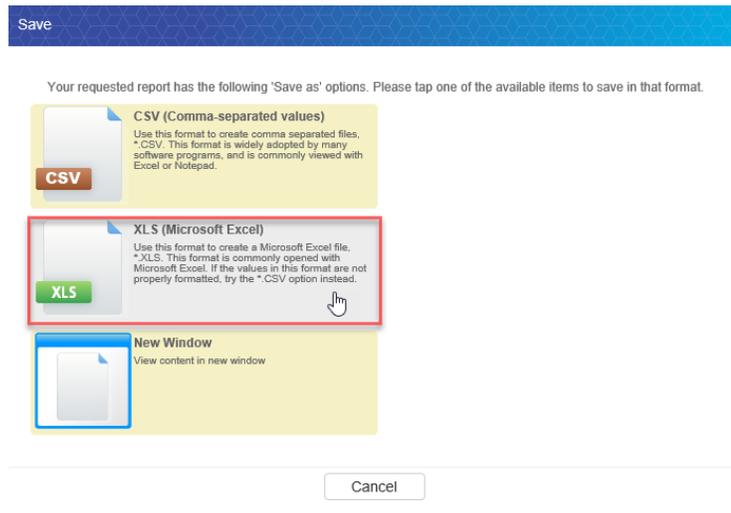
COMMISSIONS

DOWNLOADING STATEMENT EXTRACT

Step 4: Select Run to generate the report. **Select Save to download in Excel format.**



Step 5: A pop-up will appear at the bottom of the screen, asking you to **Open** or **Save** the Statement Extract.

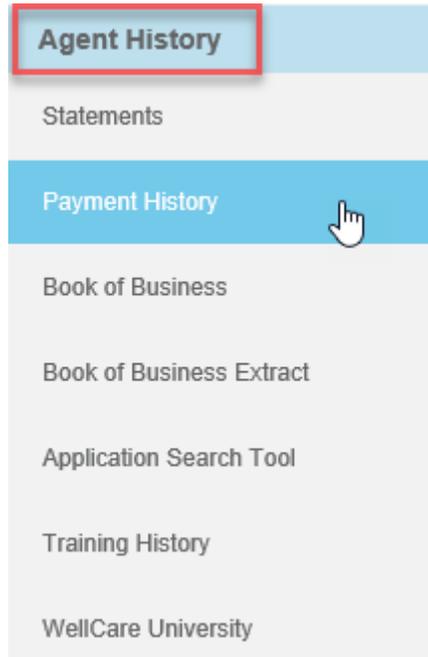


COMMISSIONS

VIEWING PAYMENT HISTORY

Within the Agent History tab, you have the ability to perform your own audits under the **Payment History** sub- tab. Take the following steps to export:

Step 1: Click the **Payment History** sub-tab under the Agent History menu located on the left side of screen.



Step 2: Refine your search by using the available search fields (Ex: Enter a Subscriber ID to locate all transactions relating to a specific member). **Click Search.**

A search form titled 'Payment History' is shown. It contains the following fields: Payment Period (text input with a calendar icon), Producer ID (text input with a search icon), Period (text input with a calendar icon), Rec Type (dropdown menu), Payment Status (dropdown menu), Hold Code (dropdown menu), Release Date (text input with a calendar icon), and Subscriber ID (text input with a search icon). Below the form are two buttons: 'Search' (blue) and 'Clear' (white).

COMMISSIONS

VIEWING PAYMENT HISTORY

Step 3: The information will populate.

The screenshot shows a 'Payment History' search interface. At the top, there are several input fields for filtering: 'Payment Period', 'Period', 'Payment Status', 'Release Date', 'Producer ID', 'Rec. Type', 'Hold Code', and 'Subscriber ID'. Below the search form is a table with columns for various data points including Producer ID, Producer Name, Period, Subscriber ID, Member Name, Product, Signed Date, CMS Cont. FBP, HICN, Oed, Effective Date, Termination Cycle Year, Member P. Market, Plan Type, Commission Voucher Release Date, and Adjuster. The table contains multiple rows of data, with some rows highlighted in red.

Step 4: Export the populated results by clicking the  button on the upper right hand of your screen.

Select 'All records matching search criteria' bullet. Click **OK**.

The screenshot shows the 'Export Data Form Search Form' dialog box. It has a title bar with a close button. The 'Export Data Selection' section contains two radio buttons: 'All records matching search criteria limited to 75000 records' (which is selected and highlighted with a red box) and 'All records matching search criteria (limited to 75000)'. The 'Format' section includes a checked 'Include Header Row?' checkbox and several radio button options: 'Excel 97-2003 (*.xls) (limited to 65536)' (selected), 'Excel (*.xlsx)', 'Comma Delimited (CSV)', and 'Delimited: .' with a text input field. At the bottom, there are 'Ok' and 'Cancel' buttons, with the 'Ok' button highlighted by a red box and a mouse cursor pointing to it.

Step 5: Open or Save the Excel download.

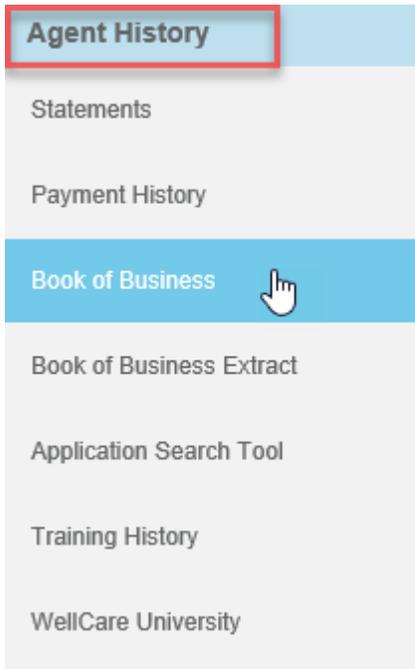
The screenshot shows a file save dialog box with the title 'Do you want to open or save BrokerHistoryBrokerPortalSF115924176795110000.xls (9.50 KB) from wellcare.callidusinsurance.net?'. The dialog has three buttons: 'Open', 'Save' (with a dropdown arrow), and 'Cancel'. The 'Open' and 'Save' buttons are highlighted with a red box.

COMMISSIONS

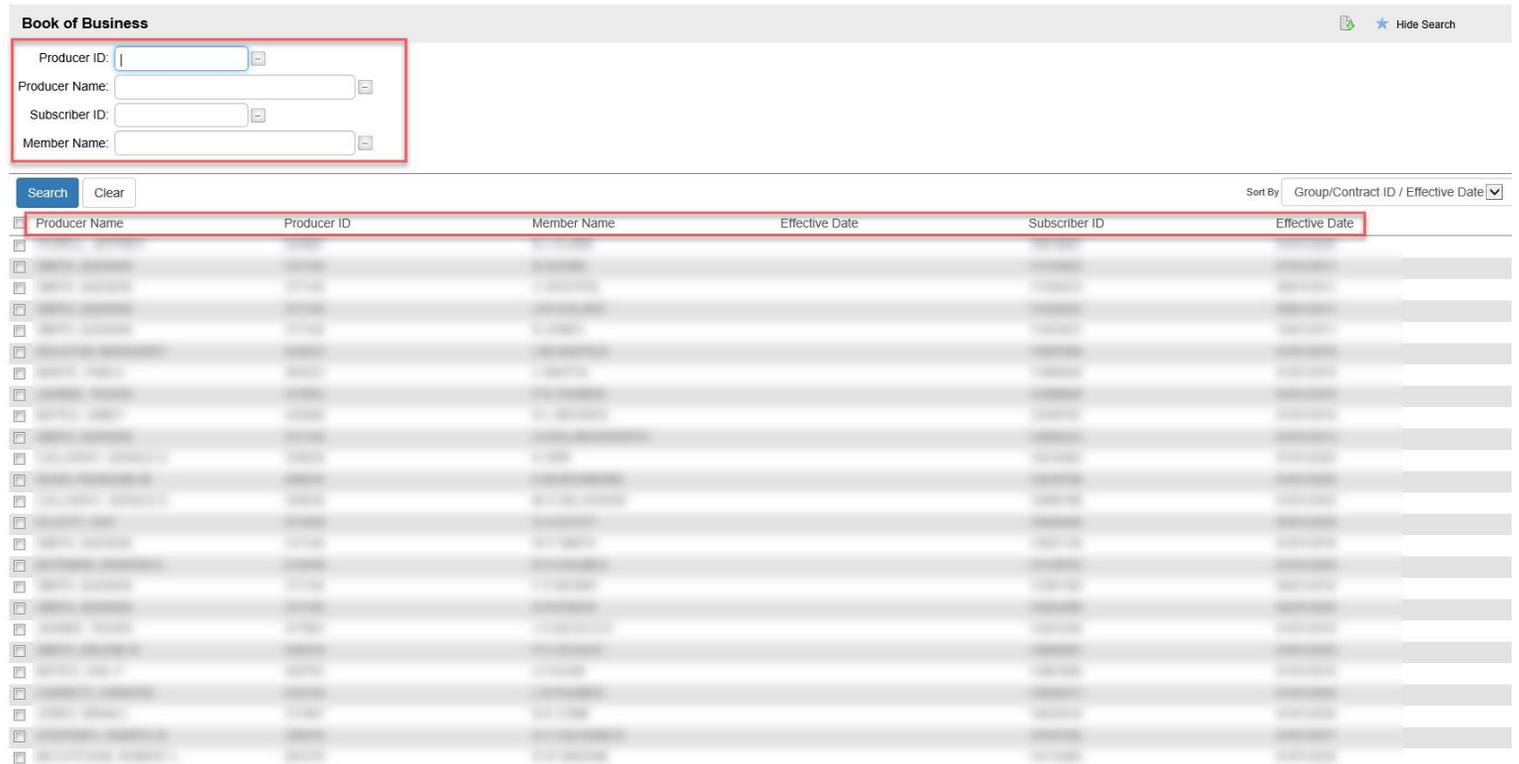
VIEWING YOUR BOOK OF BUSINESS

Within the Agent History tab in Agent Connect you have the ability to view your **Book of Business**. Take the following steps:

Step 1: Click the **Book of Business** sub-tab under the Agent History menu located on the left side of screen.



Step 2: Search for specific members using the available fields, or view your book as a whole!



COMMISSIONS

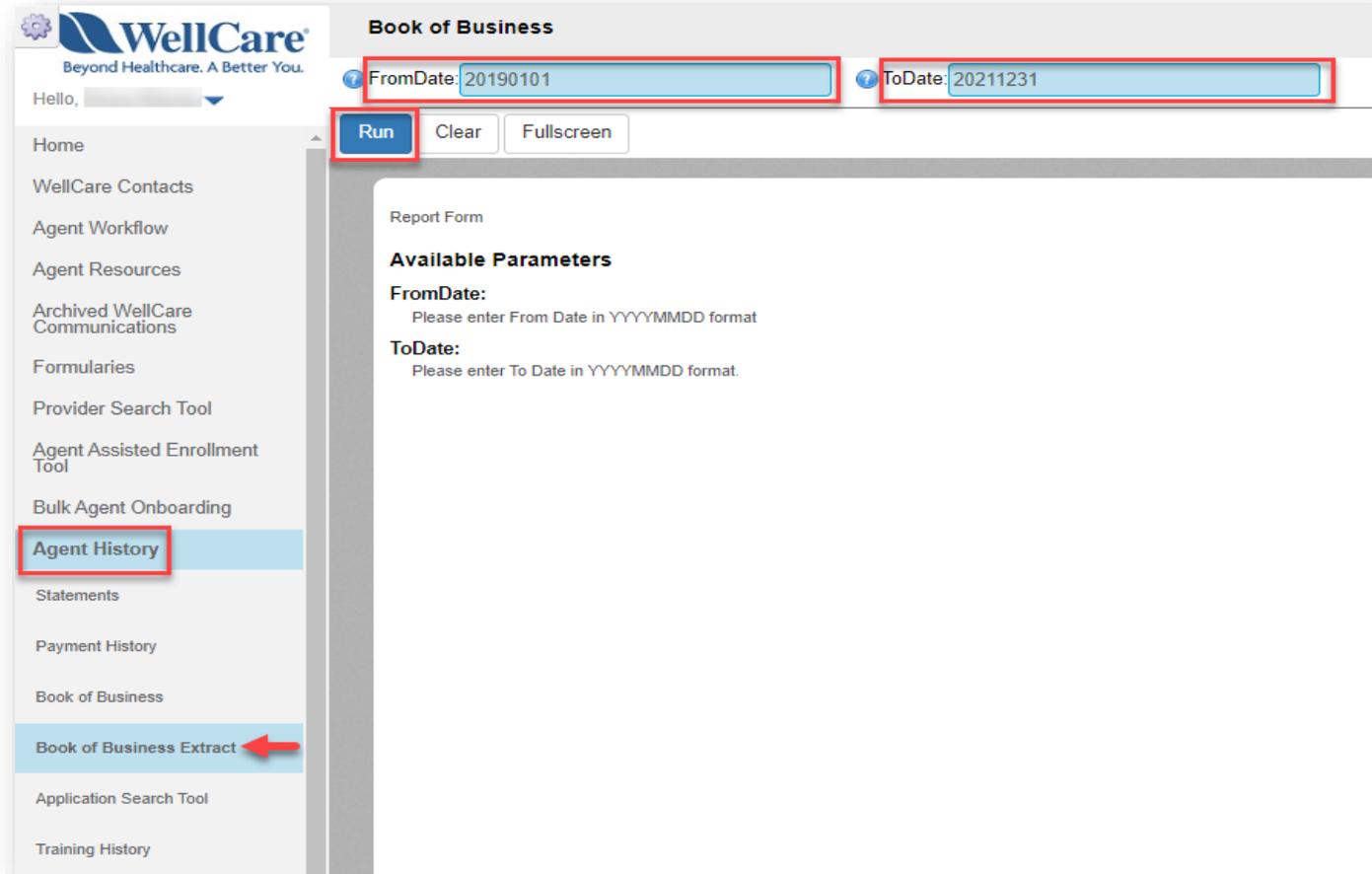
DOWNLOADING BOOK OF BUSINESS

Within the Agent History tab in Agent Connect you have the ability to download your **Book of Business**. Take the following steps to export:

Step 1: Click the **Book of Business Extract** sub-tab under the Agent History menu located on the left side of screen.

Enter the dates you are searching using **YYYYMMDD** format in the **FromDate** and **ToDate** fields at the top of the screen.

Step 2: Click **Run** to populate results.



COMMISSIONS

DOWNLOADING BOOK OF BUSINESS (continued)

Step 3: Click **Save**. Select **CSV** (Comma-separated values) or **XLS** (Microsoft Excel) option to export the data into an Excel spreadsheet document.

The screenshot displays the WellCare 'Book of Business' interface. The top navigation bar includes the WellCare logo and the text 'Beyond Healthcare. A Better You.' Below this, a user greeting 'Hello, Sonya Massey' is visible. A toolbar contains buttons for 'Run', 'Clear', 'Fullscreen', 'Send', and 'Save', with a red arrow pointing to the 'Save' button. A table with columns for 'Broker ID', 'Broker Name', 'Policy Number', 'Member ID', 'Member Name', 'CMS Contract #', 'Policy Effective Date', 'Policy Termination Date', 'HICN', 'Member DOB', 'Member Phone', 'Member Address', 'Member Address 2', 'Member City', 'Member State', 'Member Zip', and 'PolStatus' is shown below the toolbar. A sidebar on the left lists various navigation options, with 'Agent History' and 'Book of Business Extract' highlighted by red boxes and arrows. A 'Save' dialog box is open in the foreground, titled 'Save', and contains the following text: 'Your requested report has the following "Save as" options. Please tap one of the available items to save in that format.' The dialog box offers three options: 'CSV (Comma-separated values)', 'XLS (Microsoft Excel)', and 'New Window'. The 'CSV' and 'XLS' options include brief descriptions of their respective file formats. A 'Cancel' button is located at the bottom right of the dialog box.



AGENT CONNECT USER GUIDE

AGENT PROFILE CHANGES

AGENT PROFILE CHANGES

AGENT 360 VALIDATION

Agent 360 allows you to view and manage your profile information. You are able to change your demographic information, manage commission assignments and change your hierarchy assignment.

Step 1: Login to Agent Workflow

Step 2: Click Agent 360

Step 3: Enter your PID, NPN or SSN and click Search

The screenshot displays the Agent 360 validation interface. On the left, a navigation sidebar includes 'Home', 'AGE Agent360' (highlighted with a red arrow), 'INV ManualMassTransactions', and 'Find Cases'. The main content area, titled 'Agent 360', features a welcome message and a list of actions: 'Change your demographic information', 'Manage commission assignment elections', and 'Request hierarchy re-assignment'. Below this is an 'Agent Search' section with a note: 'For security purposes, please validate your identity by providing one of the following identifiers: Producer ID, NPN, or SSN. Note: If the record indicates an INELIGIBLE status, this indicates a maintenance activity involved with your record. Please try again at a later time. If you have any questions, please contact WellCare at salesupport@wellcare.com.' The search section contains three input fields: 'Producer ID:', 'NPN:', and 'SSN:'. A 'Search' button is highlighted with a red box and arrows, and a 'Submit' button is located below it.

AGENT PROFILE CHANGES

AGENT 360 VALIDATION (continued)

Step 4: Select your information by selecting the radio button (or circle) next to **Search Results**

NOTE: You can only access your information. If you attempt to input another person's information not associated with you, you will receive an error.

Agent 360

Welcome to Wellcare's Agent 360!
Agent360 allows you to view and manage your profile information in the following categories:

- Change your demographic information
- Manage commission assignment elections
- Request hierarchy re-assignment

Agent Search

For security purposes, please validate your identity by providing one of the following identifiers: **Producer ID, NPN, or SSN.**
Note: If the record indicates an **INELIGIBLE** status, this indicates a maintenance activity involved with your record. Please try again at a later time. If you have any questions, please contact WellCare at salesupport@wellcare.com.

Producer ID: NPN: SSN:

Search

Agent Search Results

Below are the records found using the information supplied. Choose a record below to proceed. Please verify that the information listed is your own before continuing.

Search Results

	First Name	Last Name	Producer ID	Date of Birth	Status
<input checked="" type="radio"/>			300014		ELIGIBLE

1 total rows, displaying from 1 to 1

Submit

AGENT PROFILE CHANGES

DEMOGRAPHIC CHANGES TO YOUR PROFILE

Section 1 Allows you to make changes to your name, email address, phone number, and personal addresses. **It is required that you must complete EFT information in order to make any changes to your agent 360 profile.**

NOTE: You must complete all steps applicable in Agent 360 (1-4), then click Submit in Step 5 (Review and Submit) for your updates to be processed.

NOTE: Changes made to NAME and/or SHIPPING address will require a new W9 to be signed. You will be prompted to complete this within Section 3.

Demographics

1 Agent Demographics 2 Hierarchy Assignment 3 W9 4 Confirm Licenses 5 Review and Submit

NOTE: YOU MUST COMPLETED ALL STEPS APPLICABLE IN AGENT 360 THEN CLICK SUBMIT FOR YOUR INFORMATION/CASE TO BE PROCESSED.

Demographics
This section allows you to view and update your demographic information. Certain changes may require you to re-sign your W-9 form. Please verify all information is up to date before continuing.

Process ID: Agent 360-SelfServ-

Agent Summary

Agent Name: [Redacted]
Agent Producer ID: [Redacted]

Agent/Principal Information

Please enter/modify the following demographic information below.

Legal First Name: [Redacted] Date of Birth: [Redacted] SSN: [Redacted]
MI: [Redacted] Email: * [Redacted] NPN: [Redacted]
Legal Last Name:* [Redacted] Nickname: [Redacted]

Address Information

Click the **New/Edit** option on an address to modify the existing address fields and the **Copy From** option allows you to pre-populate a given address from another entry. Please note that P.O. Boxes and hyphens are not allowed.

Home Address	Business Address	Shipping Address
<input checked="" type="radio"/> New/Edit <input type="radio"/> Copy From Home	<input checked="" type="radio"/> New/Edit <input type="radio"/> Copy From Home	<input checked="" type="radio"/> New/Edit <input type="radio"/> Copy From Home <input type="radio"/> Copy From Business
Address Line 1:* [Redacted] Address Line 2: [Redacted] City:* [Redacted] State:* [Redacted] Zip Code:* [Redacted] Home Phone: [Redacted] Home Cell: [Redacted]	Address Line 1:* [Redacted] Address Line 2: [Redacted] City:* [Redacted] State:* [Redacted] Zip Code* [Redacted] Business Phone: [Redacted] Business Cell: [Redacted]	Address Line 1:* [Redacted] Address Line 2: [Redacted] City:* [Redacted] State:* [Redacted] Zip Code:* [Redacted] Shipping Phone: [Redacted] Shipping Cell: [Redacted]



AGENT CONNECT USER GUIDE

HIERARCHY & COMMISSION ASSIGNMENT CHANGES

HIERARCHY & COMMISSION ASSIGNMENT CHANGES

HIERARCHY CHANGE / ASSIGNMENT

Quick Glance - This slide shows a screen shot of the actual page. The following slides will zoom in further and provide step by step instructions to make these changes.

Upline and Commission Change

1 Agent Demographics Assignment 2 **Hierarchy Assignment** 3 W9 4 Confirm Licenses 5 Review and Submit

Process ID: Agent 360-SellServ-45571

Hierarchy Assignment
Please review/update your hierarchy and commission assignment information.

Agent Summary

Agent Name: SMITH, ANDREW J	Company Name: N/A	FMO: WELLCARE FMO
Agent Producer ID: 598083	Company Producer ID: N/A	

Upline
Below is your current upline information.

Name: WELLCARE FMO	Full Assignment Model: No
Producer ID: 300014	Title: WellCare FMO

Request Upline Change
You can propose a change to your current upline by checking the box below.

Request Transfer

Commission Assignment
Below is your current assignment information.

Name: WELLCARE FMO
Producer ID: 300014

Assignment Search
Change Commission Assignment
If you would like to change your commission assignment check the Change Commission Assignment box below.

Request Transfer

You can choose the options below to change the assignment of your commissions. If you choose the Other Hierarchy option, you can select your proposed new commission assignment from available downlines for your upline's hierarchy. Utilize the Search option to select assignment outside your upline's direct reports. Upon choosing your proposed new commission assignment, confirm the change by clicking the Confirm Request button.

Self My Company My Upline Other Hierarchy Search

Producer ID: Search

Assignment Search Results
Choose Assignment
Below you will find the available uplines in your current or newly chosen hierarchy. Upon selecting, click the Confirm Request button to request an assignment to the selected upline.

Producer ID	Name	Title	Full Assignment	Eligible
Nothing found to display				

0 total rows, displaying from 0 to 0

Confirm Request

Assignment Summary
This section displays your assignment information. An assignment designated as CURRENT denotes the information WellCare has on record. An assignment designated as NEW will be your assignment once the appropriate approval processes have been completed. If you would like to remove a change to your upline or current assignment you can click the Remove link beside the item you wish to remove.

	Type	Status	Upline Producer ID	Upline Name	Upline Title	FMO Producer ID	FMO Name
Remove	Hierarchy Change	CURRENT	300014	WELLCARE FMO	WellCare FMO	300014	WELLCARE FMO
Remove	Commission Assignment	CURRENT	300014	WELLCARE FMO	WellCare FMO	300014	WELLCARE FMO

HIERARCHY & COMMISSION ASSIGNMENT CHANGES

HIERARCHY CHANGE PROCESS

Step 1: Check the box next to **Request Transfer**

Step 2: Enter the PID, Name or Company name for the proposed hierarchy. Click **Search**

Step 3: Select the proposed hierarchy and click **Confirm Request**

Upline and Commission Change

1 Agent Demographics 2 **Hierarchy Assignment** 3 Wb 4 Confirm Licenses 5 Review and Submit

Hierarchy Assignment
Please review/update your hierarchy and commission assignment information. Process ID: Agent 360-SelfServ-1261

Agent Summary

Agent Name: [REDACTED] Company Name: N/A FMO: WELLCARE FMO
Agent Producer ID: [REDACTED] Company N/A Producer ID:

Upline
Below is your current upline information.
Name: WELLCARE FMO Full Assignment Model: No
Producer ID: 300014 Title: WellCare FMO

Request Upline Change
You can propose a change to your current upline by checking the box below.
 Request Transfer

Upline Search
You can search for your proposed new upline using the upline's Producer ID, First Name, or Last Name and clicking the Search button. Upon choosing your proposed new upline, confirm the change by clicking the Confirm Request button.

Producer ID: [REDACTED] First Name: [REDACTED] Entity Name/Last Name: [REDACTED]
[Search]

Upline Search Results

Producer ID	Name	Full Assignment	Title	Eligible
[REDACTED]	[REDACTED]	No	FMO	ELIGIBLE

1 total rows, displaying from 1 to 1

[Confirm Request]

HIERARCHY & COMMISSION ASSIGNMENT CHANGES

HIERARCHY CHANGE/ASSIGNMENT – REJECTED

! If a hierarchy change proposal is **REJECTED**, the agent who submitted the request will receive an email notification confirming the rejection. **The process ends here.**



HIERARCHY & COMMISSION ASSIGNMENT CHANGES

HIERARCHY CHANGE/ASSIGNMENT – COMPLETE

! Once the hierarchy change request has been **APPROVED**, all parties involved will receive an email notification confirming hierarchy update processing.



HIERARCHY & COMMISSION ASSIGNMENT CHANGES

COMMISSION CHANGE / ASSIGNMENT & EFT OPTIONS

Commission Assignment is the contracted Agent who you elect to receive your commission check.

Select one of the following:

- **Self/ My Company** (You receive your own commissions or assign to your agency if you are the principal)
- **My Upline** (Your direct Upline receives your commissions)
- **Other Hierarchy** (Another hierarchy within your hierarchy's downline receives your commissions)
- **Search** (Input any Producer ID to receive your commissions)

Click **Confirm Request**

The screenshot shows a web form titled "Commission Assignment". At the top, the title "Commission Assignment" is highlighted with a red box. Below the title, it says "Below is your current assignment information." followed by fields for "Name:" and "Producer ID:". Below these fields is a section titled "Assignment Search" with a search icon. Underneath is a section titled "Change Commission Assignment" with the instruction: "If you would like to change your commission assignment check the Change Commission Assignment box below." There is a checkbox labeled "Request Transfer". Below that, a paragraph explains the options: "You can choose the options below to change the assignment of your commissions. If you choose the Other Hierarchy option, you can select your proposed new commission assignment from available downlines for your upline's hierarchy. Utilize the Search option to select assignment outside your upline's direct reports. Upon choosing your proposed new commission assignment, confirm the change by clicking the Confirm Request button." Below this paragraph, a row of radio buttons is highlighted with a red box: "Self" (selected), "My Company", "My Upline", "Other Hierarchy", and "Search". At the bottom, there is a "Producer ID:" label, an input field, and a blue "Search" button.

HIERARCHY & COMMISSION ASSIGNMENT CHANGES

COMMISSION CHANGE / ASSIGNMENT OPTIONS

Self/ My Company:

- Select **Checking** or **Savings** to confirm your Account Type
- Enter your **Routing Number**, and your Bank Name will populate
- Enter your **Account Number**. You must enter this number twice for verification purposes
- Click **Next**

Electronic Funds Transfer (EFT)

I authorize Centene Corp, hereinafter called the Company, to make payment of any amount owing me (us) by initiating credit entries into the account and at the bank listed below. This agreement will remain until I give written notice to change financial institutions, terminate service or until the Company notifies me that this service has been terminated. I hereby authorize the Company and the financial institution to electronically deposit any payment into my designated account and to correct my account for any amounts deposited to which I am not entitled.

Fill in complete banking information in the section indicated below. If routing number is unknown, please contact your bank.
Please note that EFT/Banking information changes will take effect within two payment cycles.

EFT Flag: 0

Account Type: Checking Savings

Routing Number: *

Bank Name:

Account Number: *

Confirm Account Number: *

Click **Previous** to return to the previous step. Once all required information has been entered, click **Next** to continue.

Previous

HIERARCHY & COMMISSION ASSIGNMENT CHANGES

COMMISSION CHANGE / ASSIGNMENT OPTIONS

Self/ My Company: Bypass EFT box will be checked when we have your EFT information on file. Uncheck this box to edit/ update your EFT information. For security purposes, if you are already set up with EFT, your current banking information will not display.

Assignment Summary

Electronic Funds Transfer (EFT)

I authorize Centene Corp, hereinafter called the Company, to make payment of any amount owing me (us) by initiating credit entries into the account and at the bank listed below. This agreement will remain until I give written notice to change financial institutions, terminate service, or until the Company notifies me that this service has been terminated. I hereby authorize the Company and the financial institution to electronically deposit any payment into my designated account and to correct my account for any amounts deposited to which I am not entitled.

Fill in complete banking information in the section indicated below. If routing number is unknown, please contact your bank.
Please note that EFT/Banking information changes will take effect within two payment cycles.

If you already set up EFT, your current banking information will not display below for security purposes.
Need to update your banking information?
Click the EFT Information (checkbox) for the banking fields to appear.
No update to current banking information? Click Next to proceed

EFT Flag: 1

Bypass EFT: Bypass

EFT Flag: 1

Bypass EFT: Bypass

Account Type: Checking Savings

Routing Number: *

Account Number: *

Bank Name:

Confirm Account Number: *

HIERARCHY & COMMISSION ASSIGNMENT CHANGES

COMMISSION CHANGE / ASSIGNMENT OPTIONS

My Upline:

- Check the Request Transfer box
- Select the My Upline option
- Confirm Request
- Once approved, your Commission Assignment information will display under the Agent Summary

! **NOTE:** Selecting My Upline will update and remove any previously provided EFT information.

The screenshot shows a web form titled "Assignment Search". It has a sub-header "Change Commission Assignment" and a note: "If you would like to change your commission assignment check the Change Commission Assignment box below." There is a checked checkbox for "Request Transfer". Below this, a paragraph explains the options: "You can choose the options below to change the assignment of your commissions. If you choose the Other Hierarchy option, you can select your proposed new commission assignment from available downlines for your upline's hierarchy. Utilize the Search option to select assignment outside your upline's direct reports. Upon choosing your proposed new commission assignment, confirm the change by clicking the Confirm Request button." There are four radio buttons: "Self", "My Upline" (which is selected), "Other Hierarchy", and "Search". Below the radio buttons is a "Confirm Assignment" section with a "Confirm Request" button.

The screenshot shows the "Agent Summary" page. It displays agent information: "Agent Name: [redacted]", "Agent Producer ID: [redacted]", "Company Name: N/A", "Company Producer ID: N/A", and "FMO: WELLCARE FMO". Below this is the "Upline" section, which states "Below is your current upline information." and shows "Name: WELLCARE FMO", "Producer ID: 300014", "Full Assignment Model: No", and "Title: WellCare FMO". There is a "Request Upline Change" section with a note "You can propose a change to your current upline by checking the box below." and an unchecked checkbox for "Request Transfer". At the bottom is the "Commission Assignment" section, which states "Below is your current assignment information." and shows "Name: WELLCARE FMO" and "Producer ID: 300014".

HIERARCHY & COMMISSION ASSIGNMENT CHANGES

COMMISSION CHANGE / ASSIGNMENT OPTIONS

Other Hierarchy:

- Check the Request Transfer box
- Select the Other Hierarchy option
- Choose Your Assignment- select the available uplines within your hierarchy that are eligible for commission assignment
- Confirm Request
- Review the Assignment Summary and click Next

Assignment Search

Change Commission Assignment

If you would like to change your commission assignment check the Change Commission Assignment box below.

Request Transfer

You can choose the options below to change the assignment of your commissions. If you choose the **Other Hierarchy** option, you can select your proposed new commission assignment from available downlines for your upline 's hierarchy. Utilize the **Search** option to select assignment outside your upline's direct reports. Upon choosing your proposed new commission assignment, confirm the change by clicking the **Confirm Request** button.

Self My Upline Other Hierarchy Search

Assignment Search Results

Choose Assignment

Below you will find the available uplines in your current or newly chosen hierarchy. Upon selecting, click the **Confirm Request** button to request an assignment to the selected upline.

Producer ID	Name	Title	Full Assignment	Eligible
300014	WELLCARE FMO	WellCare FMO	No	ELIGIBLE

1 total rows, displaying from 1 to 1

Confirm Request

Assignment Summary

This section displays your assignment information. An assignment designated as **CURRENT** denotes the information WellCare has on record. An assignment designated as **NEW** will be your assignment once the appropriate approval processes have been completed. If you would like to remove a change to your upline or current assignment you can click the **Remove** link beside the item you wish to remove.

Type	Status	Upline Producer ID	Upline Name	Upline Title	FMO Producer ID	FMO Name
Remove Hierarchy Change	CURRENT					
Remove Commission Assignment	NEW					

Click **Abort** to cancel your Agent 360 process. Please note that you must be certified to be able to conduct business on behalf of WellCare. **Abort**

Click **Previous** to return to the previous step. Once all required information has been entered, click **Next** to continue. **Previous** **Next**

! **NOTE:** Selecting Other Hierarchy will update and remove any previously provided EFT information.

HIERARCHY & COMMISSION ASSIGNMENT CHANGES

COMMISSION CHANGE / ASSIGNMENT OPTIONS

Search:

- Check the Request Transfer box
- Select the Search option
- Enter the Producer ID
- Search
- Choose Assignment- select the available uplines within the hierarchy that are eligible for commission assignment
- Confirm Request
- Review the Assignment Summary and click Next

NOTE: Selecting Search will update and remove any previously provided EFT information.

Assignment Search

Change Commission Assignment

If you would like to change your commission assignment check the Change Commission Assignment box below.

Request Transfer

You can choose the options below to change the assignment of your commissions. If you choose the Other Hierarchy option, you can select your proposed new commission assignment from available downline for your upline's hierarchy. Utilize the Search option to select assignment outside your upline's direct reports. Upon choosing your proposed new commission assignment, confirm the change by clicking the Confirm Request button.

Self My Upline Other Hierarchy Search

Producer ID:

Assignment Search Results

Choose Assignment

Below you will find the available uplines in your current or newly chosen hierarchy. Upon selecting, click the Confirm Request button to request an assignment to the selected upline.

Producer ID	Name	Title	Full Assignment	Eligible
<input type="radio"/>		FMO	No	ELIGIBLE

1 total rows, displaying from 1 to 1

Assignment Summary

This section displays your assignment information. An assignment designated as CURRENT denotes the information WellCare has on record. An assignment designated as NEW will be your assignment once the appropriate approval processes have been completed. If you would like to remove a change to your upline or current assignment you can click the Remove link beside the item you wish to remove.

	Type	Status	Upline Producer ID	Upline Name	Upline Title	FMO Producer ID	FMO Name
Remove	Hierarchy Change	CURRENT					
Remove	Commission Assignment	NEW					

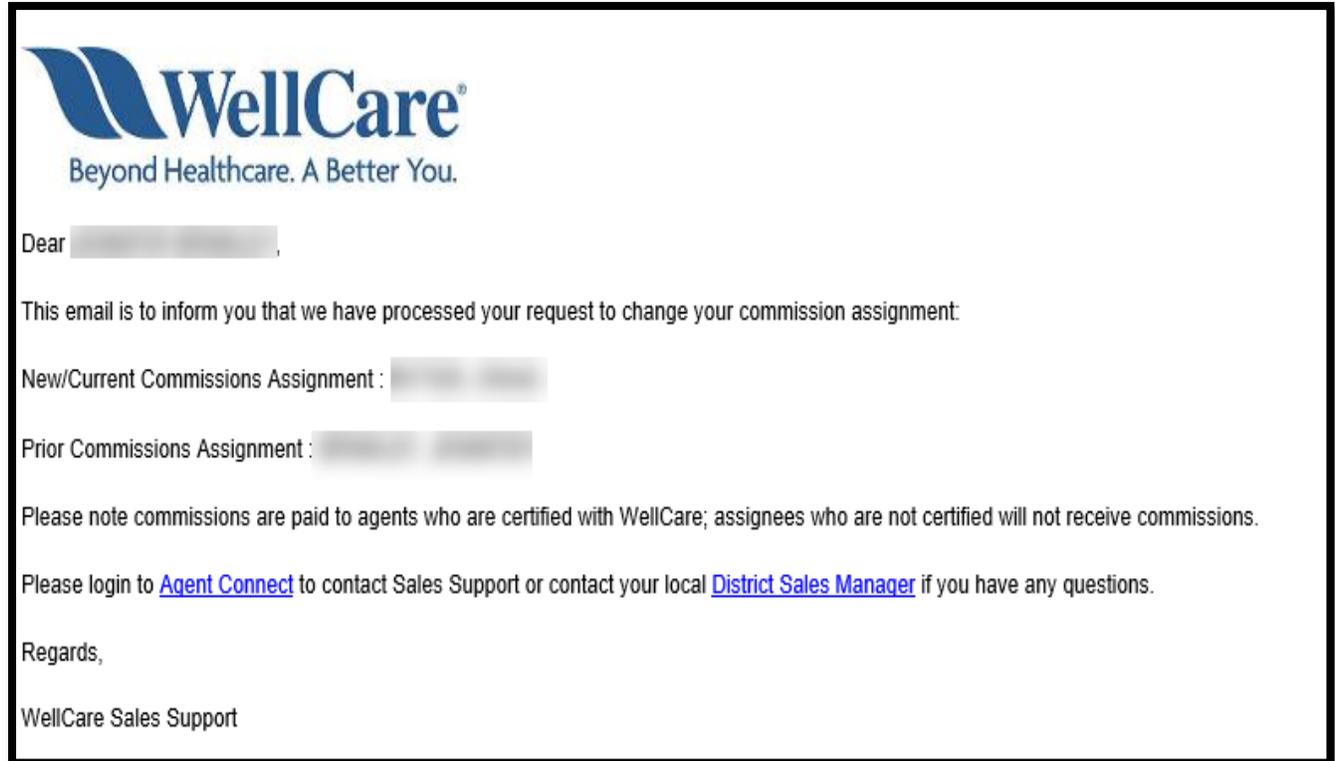
Click Abort to cancel your Agent 360 process. Please note that you must be certified to be able to conduct business on behalf of WellCare.

Click Previous to return to the previous step. Once all required information has been entered, click Next to continue.

HIERARCHY & COMMISSION ASSIGNMENT CHANGES

COMMISSION ASSIGNMENT – COMPLETE

! You will receive an email confirmation when the commission assignment has been **APPROVED** in the system.





AGENT CONNECT USER GUIDE

REQUIRED FORMS & ACKNOWLEDGEMENT

REQUIRED FORMS & ACKNOWLEDGEMENT

IRS W9 TAX FORM

Section 3 - If you elected to update your Name and/or Shipping address in Section 1, Section 3 is where you will sign a new W9 to reflect your changes.

Step 1: If there are changes to make to your **Tax Classification**, update in this section.

Step 2: Check the box to Acknowledge and agree to the terms.

Step 3: Sign the W9 with your electronic signature

Step 4: Select Next to continue

Sign W9

1 Agent Demographics 2 Hierarchy Assignment 3 W9 4 Confirm Licenses 5 Review and Submit

W-9
You are requested to review and e-sign a W-9 form.
The final signed document can be viewed by clicking the link in the Signed W-9 field. You can make corrections and resign the document.
To continue the Agent 360 process click Next.

Process ID:
Agent 360-SelfServ-1261

W-9
Review W-9
Please click the link below to open and view the W-9. Please carefully review the content of the document prior to signing it.

W-9: W-9

Tax Classification
Please choose your applicable exemption codes from the fields below. Note that if there is a code that does not apply, choose N/A (Not Applicable).

Exempt Code Explanations

Payee Code: N/A FATCA Code: N/A

Federal Tax Classification: Sole Proprietor C Corporation S Corporation Partnership Limited Liability LLC Class Code Trust / Estate Exempt Payee

Electronic Signature

Acknowledgement
I hereby acknowledge that I have read and reviewed the W-9; by applying my signature below, I agree to the terms outlined by these documents.

acknowledge I read and understand the content of the document and agree to its terms

Signature: Date: 02/05/2018

Please click Sign button to apply your signature to the W-9.

Signed W-9
Please click the link below to access/view the signed document.
Before proceeding, please review the contents of the document for accuracy.

Signed W-9:

Click Abort to cancel your Agent 360 process. Please note that you must be certified to be able to conduct business on behalf of WellCare. Abort

Click Previous to return to the previous step. Once all required information has been entered, click Next to continue. Previous Next



AGENT CONNECT USER GUIDE

LICENSING

LICENSING

CONFIRM LICENSES

Section 4 - If your license information shown is incorrect or needs to be updated, complete the following steps:

Step 1: Check the license information box

Step 2: Provide a reason

Step 3: Click **Next**

NOTE: Use the Search field to filter on individual licenses.



Confirm Licenses

1 Agent Demographics 2 Hierarchy Assignment 3 W9 4 **Confirm Licenses** 5 Review and Submit

Confirm Licenses
Below is your current license information on record with WellCare. If there are any inconsistencies with the displayed information, please check the checkbox located in the **License Information** section.

Process ID: Agent 360-SelfServ-1261

Agent Summary

Agent Name: [REDACTED] Company Name: N/A FMO: WELLCARE FMO
Agent Producer ID: [REDACTED] Company Producer ID: [REDACTED]

License Information

Your license information on record with WellCare is current as of the provided date labeled **NIPR Verification Date**. If your information is not up-to-date, please check the checkbox below and specify any inconsistencies in the text box provided.

My license information below is not accurate. NIPR Verification Date: 01/29/2018
Please specify: [REDACTED]

Note: Your licenses are able to be sorted by clicking on the **State** and **Resident?** column headers in the table. Your licenses can also be searched on by state using the **Search** button at the top right of the table.

Licenses

State	License ID	Resident?	Status	License Class	Issue Date	Termination Date	Lines of Authority
							LOA Name LOA Status LOA Issue Date LOA Termination Date Agent - Accident and Sickness ACTIVE 11/19/2007 01/01/2200
							Agent -Life ACTIVE 11/19/2007 01/01/2200

1 total rows, displaying from 1 to 1

Click **Abort** to cancel your Agent 360 process. Please note that you must be certified to be able to conduct business on behalf of WellCare. **Abort**

Click **Previous** to return to the previous step. Once all required information has been entered, click **Next** to continue. **Previous** **Next**



AGENT CONNECT USER GUIDE

REVIEW & SUBMIT CHANGES

AGENT PROFILE CHANGES

REVIEW AND SUBMIT CHANGES

Section 5 - Review all changes made in Sections 1-4 to ensure new information is correct. Click **Submit** and **Yes** to confirm the Agent 360 proposed changes.

! Note: For security purposes, your current EFT information is not displayed (if applicable). By navigating to previous screens, you will be able to make changes to the information.

Review and Submit

1
2
3
4
5

This is the last opportunity to review and make corrections to the below information. For security purposes, your current EFT information is not displayed below (if applicable). By navigating to previous screens, you will be able to make changes to the information. Once reviewed, click **SUBMIT** to complete your Agent 360 process.

Process Id:
Agent 360-SelfServ-

Agent Summary

Agent Name: [REDACTED]	Company Name: N/A	FMO: WELLCARE FMO
Agent Producer ID: [REDACTED]	Company Producer ID: N/A	PM EFT Flag: 1

Hierarchy Summary

Your current/modified hierarchy information is below.

Type	Status	Upline Producer ID	Upline Name	Upline Title	FMO Producer ID	FMO Name
Hierarchy Change	CURRENT	[REDACTED]	[REDACTED]	WellCare FMO	300014	WELLCARE FMO
Commission Assignment	CURRENT	[REDACTED]	[REDACTED]	PDCR	300014	WELLCARE FMO

Producer Demographics

Please review the information below for accuracy.

Principal Information

Legal First Name: [REDACTED]	Date of Birth: [REDACTED]	SSN: [REDACTED]
MI: [REDACTED]	Email: [REDACTED]	NPN: [REDACTED]
Legal Last Name: [REDACTED]	Nickname: [REDACTED]	

Address Information

Please verify your address information below before continuing.

Home Address	Business Address	Shipping Address
Address Line 1: [REDACTED]	Address Line 1: [REDACTED]	Address Line 1: [REDACTED]
Address Line 2: [REDACTED]	Address Line 2: [REDACTED]	Address Line 2: [REDACTED]
City: [REDACTED]	City: [REDACTED]	City: [REDACTED]
State: [REDACTED]	State: [REDACTED]	State: [REDACTED]
Zip Code: [REDACTED]	Zip Code: [REDACTED]	Zip Code: [REDACTED]
Home Phone: [REDACTED]	Business Phone: [REDACTED]	Shipping Phone: [REDACTED]
Home Cell: [REDACTED]	Business Cell: [REDACTED]	Shipping Cell: [REDACTED]

Click Abort to cancel your Agent 360 process. Please note that you must be certified to be able to conduct business on behalf of WellCare.

Abort

Click Previous to return to the previous step. Once all required information has been entered, click Submit to complete your Agent 360 Process.

Submit



Questions?

Please contact Broker Support by calling **(866)-822-1339**

Monday through Friday

8am to 8pm ET

- Or -

Create a **Sales Support ticket** in Agent Connect
