Centene Workbench: Level 01

Portal Overview

Last updated: Mar 2022- RDT

Introduction

This document reviews the Level 01 Portal of Centene Workbench. The processes covered are a breakdown of the portal functions, self-service Workflows, and ticketing system within the portal.

Icon Use

Icon	Function
	Return to Table of Contents

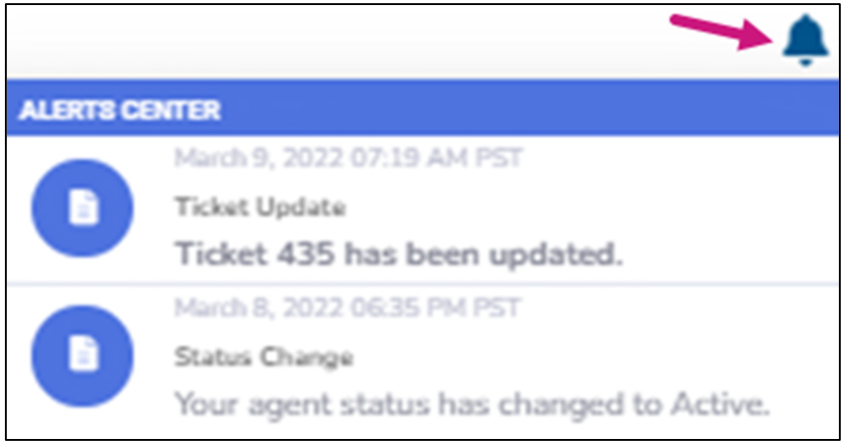
Table of Contents

Dashboard

Dashboard

Alerts

- To View a new alert or notification, refer to the red number next to the bell at the top of the Dashboard
- To see the notification, select the bell
- New unread notifications will be bolded
- To see more information, select the alert



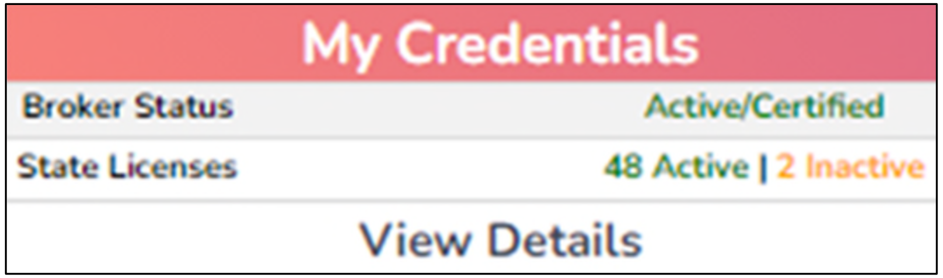
Dashboard

Widgets

The Dashboard displays several widgets to help manage your business, status, and credentials.

1. **My Credentials**
   Provides a summary of your status and state licenses

2. **Commission Statement History**
   Provides a summary of recent commissions statement



Note: To see more information, select **View Details**.

Dashboard

Widgets

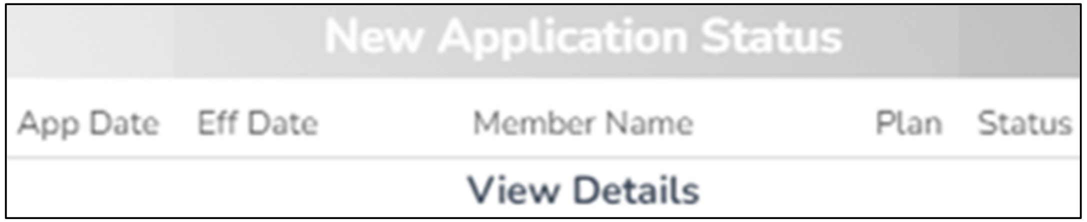
The Dashboard displays several widgets to help manage your business, status, and credentials.

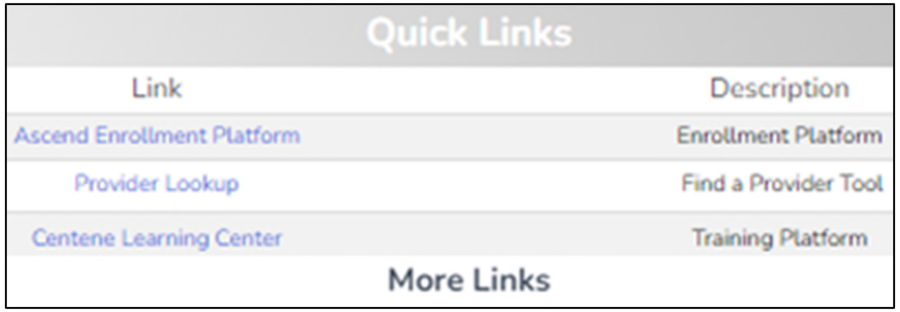
3. New Application Status

   Provides a summary of recently submitted applications

4. Quick Links

   Provides a quick access to the most commonly used links





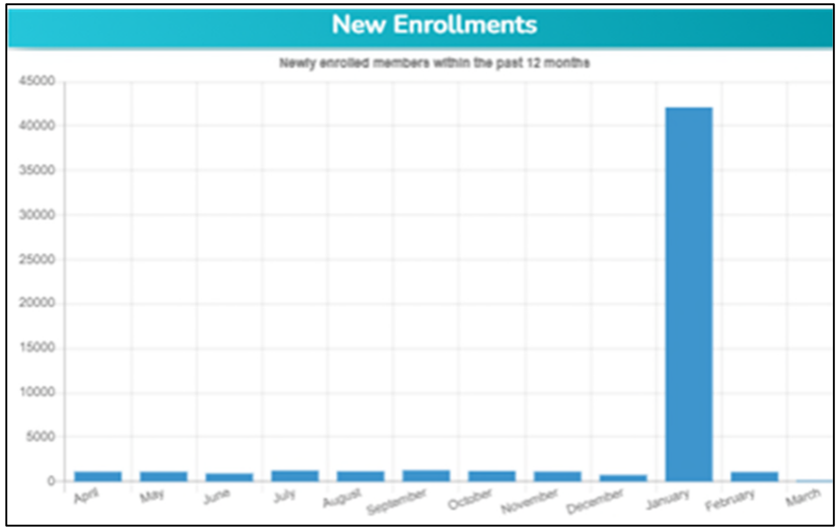
Note: To see more information, select **View Details**.

Dashboard

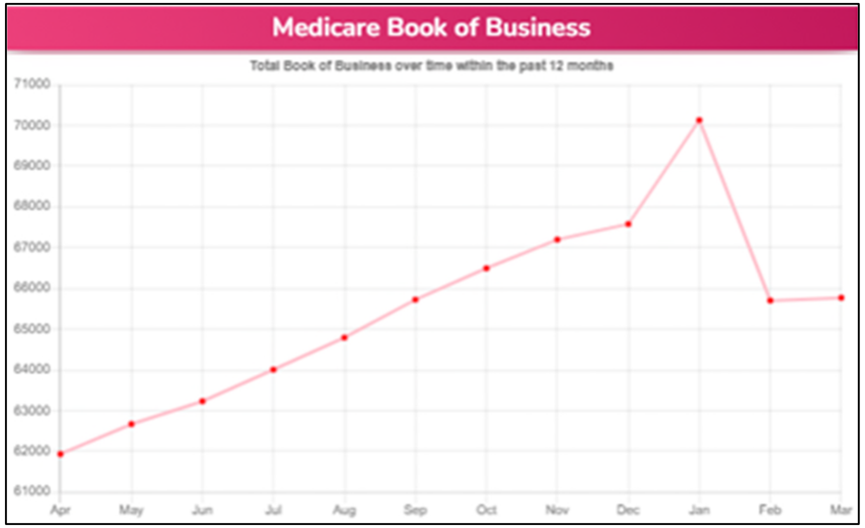
Widgets

The Dashboard displays several widgets to help manage your business, status, and credentials.

5. **New Enrollments**
   Provides a summary of newly enrolled members over a 12-month period



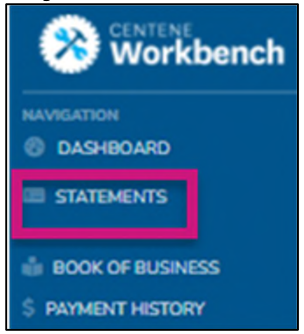
6. **Medicare Book of Business**
   Provides a summary of the total book of business over a 12-month period



Statements

Statements

If you are either Direct or Downline Only, you will receive statement information in your portal



- Once a statement is published, a new row with all details pertaining to that specific payment will display
- To view the entire statement, select the blue **Excel** button
  - The statement extract will then download
- Once a statement has been sent to AP and paid, the following columns will update and populate:
  - Payment Type
  - Payment Date
  - Payment ID

	Statement Number	Statement Date	Credits	Debits	Balance	Amount	Payment Type	Payment Date	Payment ID
Excel	[illegible]	01/01/2022	[illegible]	[illegible]	[illegible]	[illegible]	ACH		

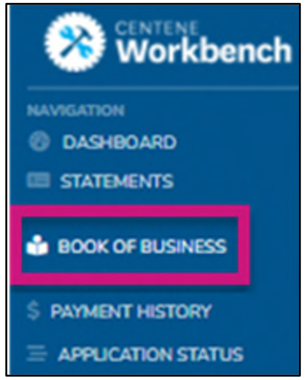
CENTENE Workbench

Book of Business

wellcare

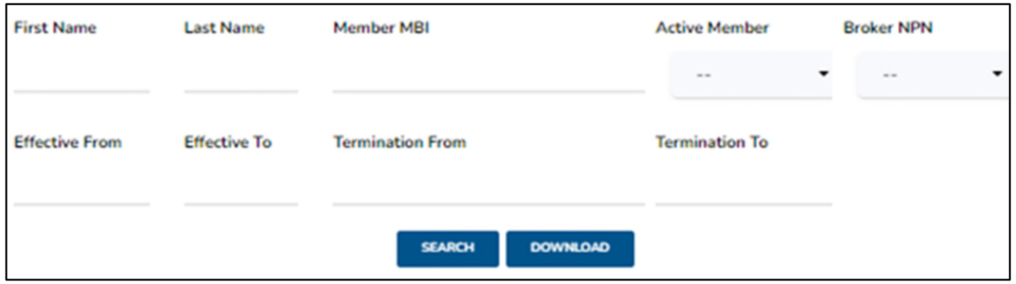
Book of Business

The Book of Business tab will display all members where you are the broker of record.



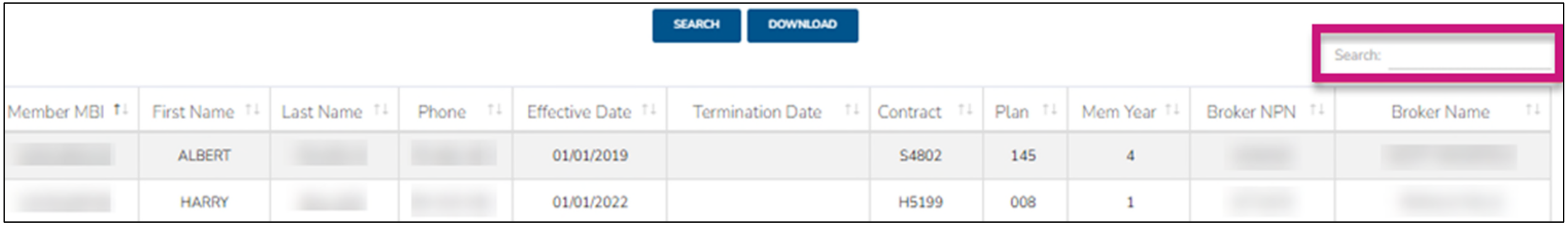
- Enter one of the below filters to look for a specific member, or members who fall under specific categories
  - Once the search criteria is entered, select **Search** to generate the results
- At any time, select **Download** to export your Book of Business into Excel

Note: The Book of Business download provides additional information about your members.



Book of Business

- Once you select the **Search** button, the member information pertaining to the search criteria will display
- From here, navigate through the list of members, or download to a CSV file for additional member information
- Also use the open text **Search** field to search for a member



Member MBI	First Name	Last Name	Phone	Effective Date	Termination Date	Contract	Plan	Mem Year	Broker NPN	Broker Name
[redacted]	ALBERT	[redacted]	[redacted]	01/01/2019		S4802	145	4	[redacted]	[redacted]
[redacted]	HARRY	[redacted]	[redacted]	01/01/2022		H5199	008	1	[redacted]	[redacted]

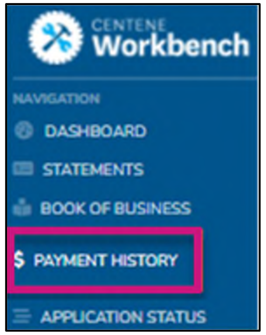
CENTENE Workbench

Payment History

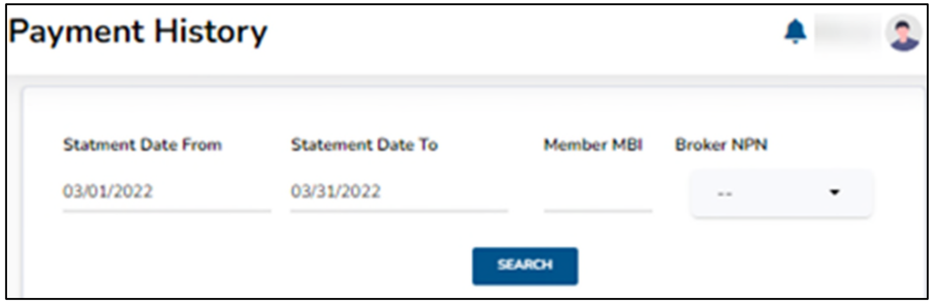
wellcare

Payment History

Payment History is a tool to assist with validating commission payments for specific members over a period of time.



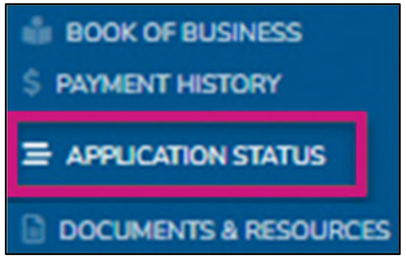
- Enter the specified date range and the Member MBI and select **Search**
- All Payments that were issued pertaining to that Member during the specified date range will generate
- Then Download to CSV



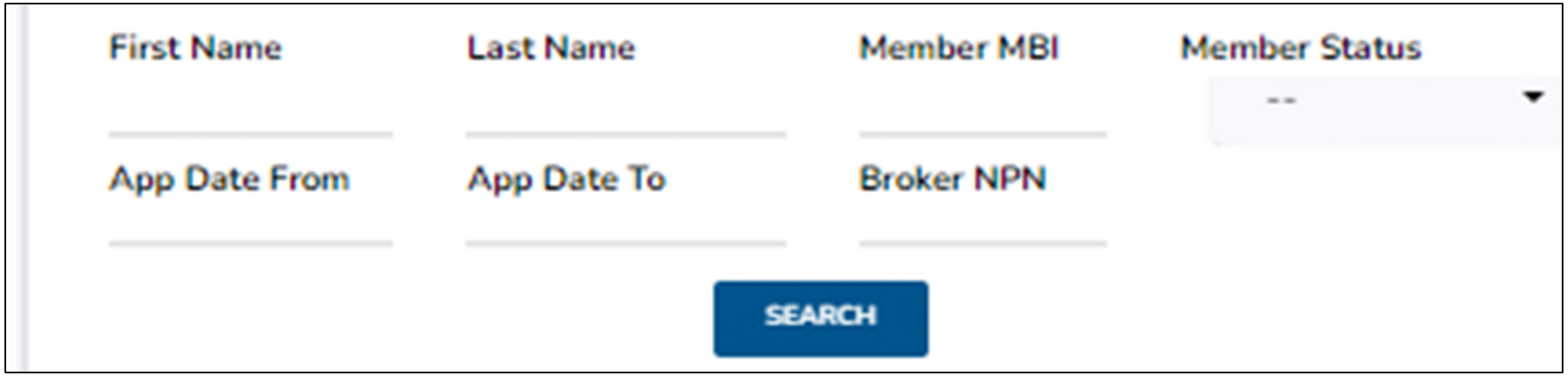
Application Status

Application Status

Application Status allows tracking of all submitted applications where you are the BOR.



- Use any of the below search fields to narrow down your generated results
- Select **Search** to show all applications



Application Status, Cont.

- Once **Search** is selected all applications and information will display
- Download the results into a CSV file is available at this time

SEARCH DOWNLOAD

Search:

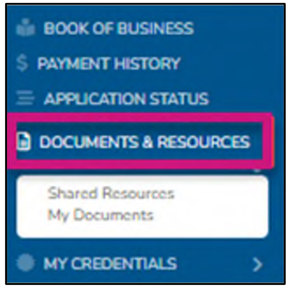
App ID	Member MBI	App Sign Date	Effective Date	First Name	Last Name	Status	Reason	Broker NPN	Broker Name
[illegible]	[illegible]	02/07/2022	03/01/2022	DOLORES	[illegible]	Enrolled-Active		[illegible]	[illegible]
[illegible]	[illegible]	02/12/2022	03/01/2022	NATHANIEL	[illegible]	Future Enroll		[illegible]	[illegible]

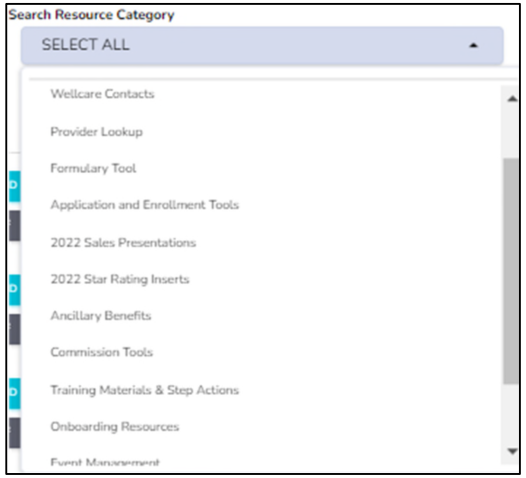
Documents & Resources

Document Resources

Shared Resources

The Shared Resources tab provides all broker related step action and resource documents.



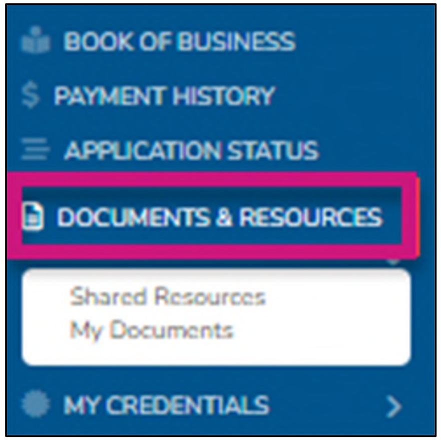


- Use the **Search Resource Category** option to look for specific document topics
- Use the open text Search field as an alternative
- If the resource is a PDF, view the document within the portal, or download it.

Document Resources

My Documents

The My Documents tab houses all documents that are specific to you and are only visible within your portal.



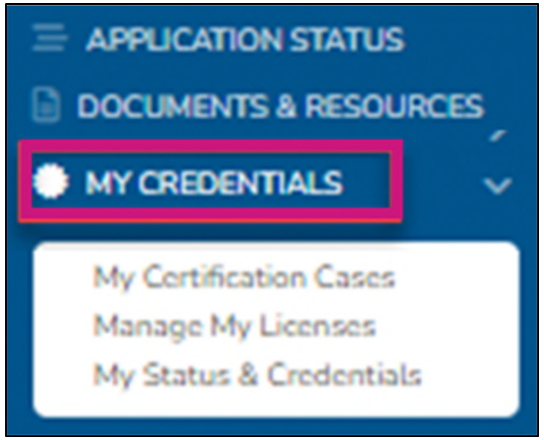
- Documents will include a copy of your Wellcare contract, W9s, any contract addendums that may be required in the future, etc.

My Credentials

My Credentials

My Certification Cases

The My Certification Cases tab allows you to review and track your onboarding history.



- Complete any annual recertification requirements.
  - Example: Contract changes to acknowledge

Note: If onboarding was through the old broker management system, no onboarding cases will be available at this time.

My Credentials

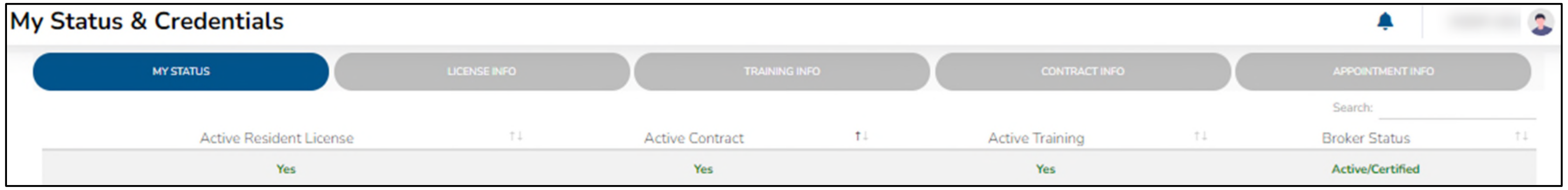
Manage My Licenses

- Active States displays which states you are currently approved to market/sell Wellcare plans
- Available States displays additional states that are available for you to add to your profile
  - After completing selecting a state (s), select the **Add Selected State** button to save your changes
  - Wellcare will then process any necessary appointments based on the state rules

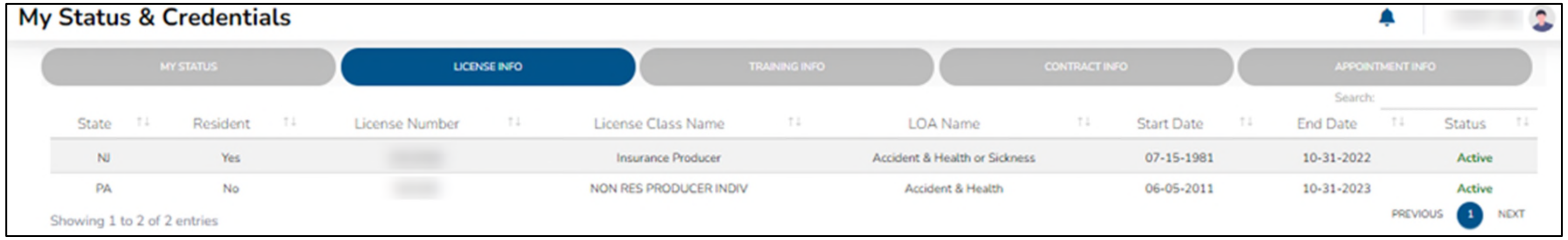
My Credentials

My Status & Credentials

The My Status tab displays information regarding your Resident License, current agreement with Wellcare, training requirements, and overall status.



The License Info tab provides more details regarding the state licenses you have elected to market/sell Wellcare products.



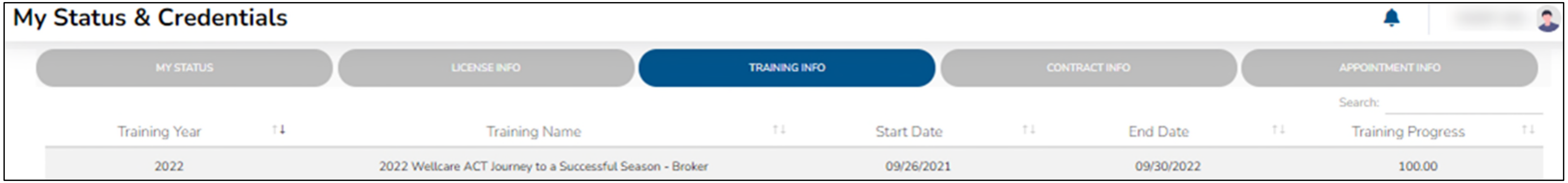
- Displays if the license is Resident or Non-Resident, the state of the license, the license number, the class and LOA name, the effective date and expiration dates, and the overall status of that license

Note: Once you have renewed a license with the State DOI, NIPR will automatically send the updated license information and it will reflect within your portal.

My Credentials

My Status & Credentials, Cont.

The Training Info tab displays AHIP and ACT history and status.

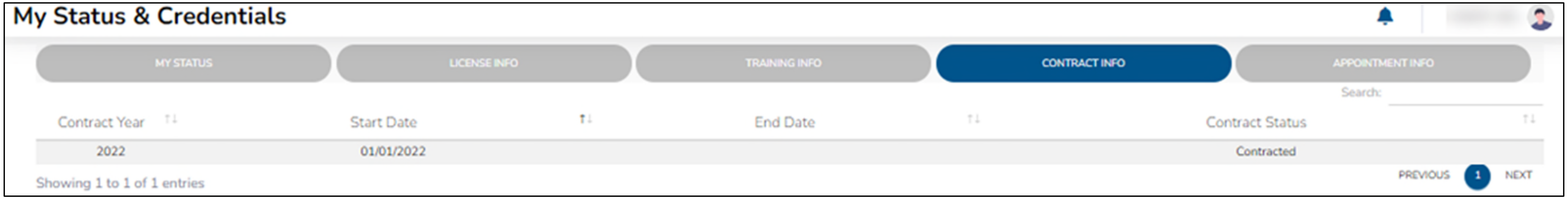


- Every year track progress through the Training Progress column.
- Training Progress Percent Breakdown:
  - 25% = AHIP Only Completed
  - 50% = AHIP + ACT Journey Completed
  - 75% = AHIP + ACT Journey & Product Completed
  - 100% = AHIP + ACT Journey & Product + ACT Exam (Passed)

My Credentials

My Status & Credentials, Cont.

The Contract Info tab provides details regarding contract status with Wellcare.

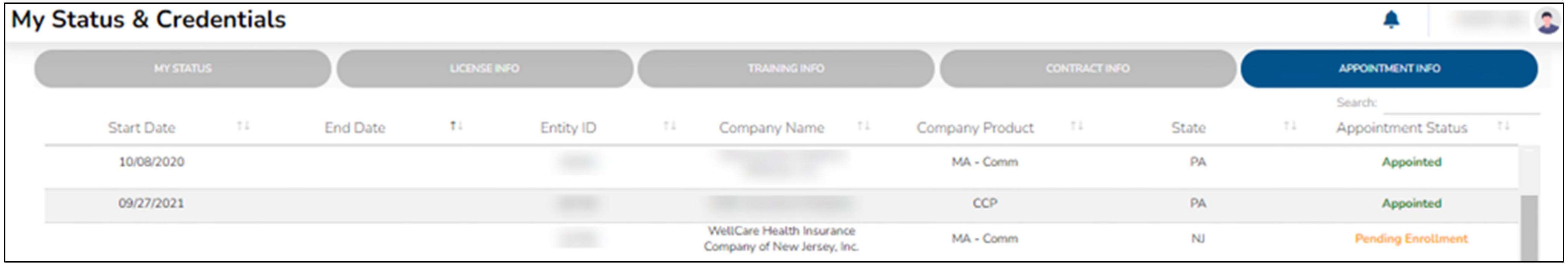


- The End Date will remain blank as long as the contract remains valid
- When there is a required contract addendum to acknowledge, a new line with the updated contract year and start date will display
    - The previous contract will be updated with an End Date

My Credentials

My Status & Credentials, Cont.

The Appointment Info tab provides details regarding Appointments with Wellcare and each state.



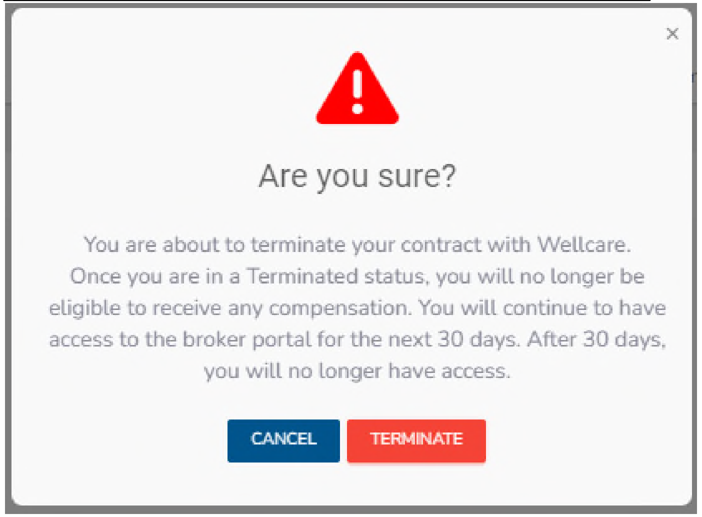
- Track the status of each appointment by using the Appointment Status column
  - Appointed = Appointed with Wellcare in that state.
  - Pending Enrollment = This state has a JIT (Just In Time) appointment rule. Wellcare will appoint the broker once an application is written in that state.
  - Ready for Appointment = the appointment has been added to the queue for processing.
  - None = the state is a non-appoint state, no appointment required.
  - Terminated = the appointment has been terminated with the state.

Note: Wellcare manages the appointments with each state. There is no action on your part. This tab is just for monitoring and tracking your credentials.

My Credentials

My Status & Credentials – Terminate Your Contract

- As a level 01 Broker, you can terminate your contract with Wellcare at any time
- Please be advised that once you are terminated, you will only have portal access for 30 days. After 30 days your access will be revoked
- To sell Wellcare products again, you will need to request a new invitation and complete all onboarding requirements

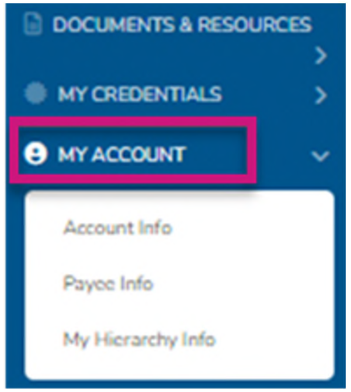


My Account

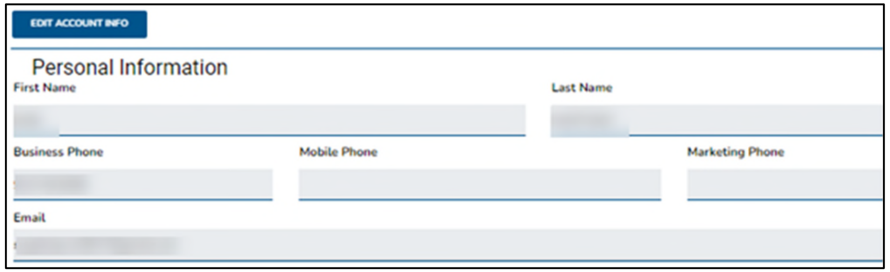
My Account

Account Info – Personal Information

Your Account Information captures your name and contact information on file.



- By selecting **Edit Account Info** you can update your phone number, add a marketing phone number, and/or update email etc.



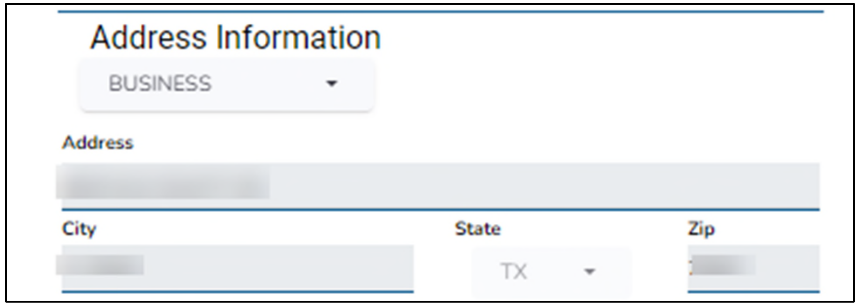
Note: When updating first or last name, you will be prompted to the Payee Info tab to make those updates and complete a W9 form.

My Account

Account Info – Address Information

Your Account Information captures your name and contact information on file.

- By selecting **Edit Account Info** update your Business or Shipping Address

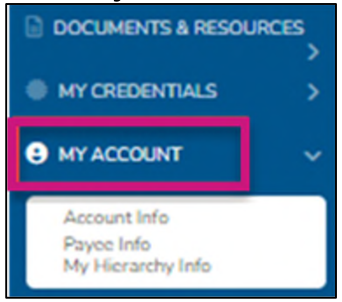


Note: When updating the Shipping Address, you will be prompted to the Payee Info tab to make those updates and complete a W9 form.

My Account

Payee Info

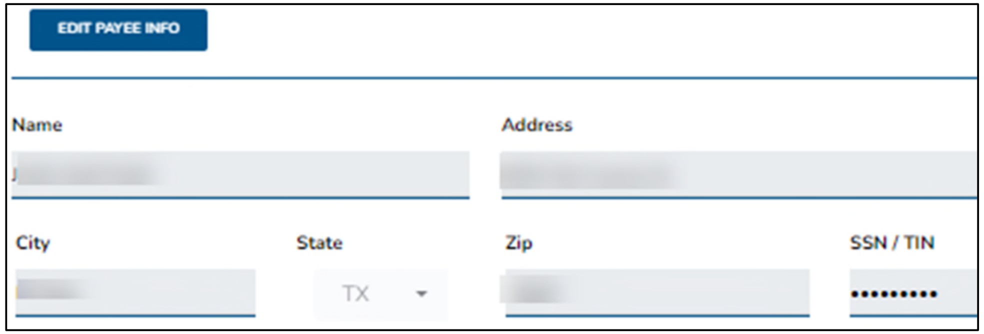
The Payee Info tab captures name and address on file for payment.



- Select the **Edit Payee Info** tab to update name or address
- The 1099 that will generate will match the information on this screen

Note: Updating name or address will cause a prompt to complete a new W9 form.

  - Once the W9 has been completed, promotion to the Account Info page will occur to make the updates as well. This will ensure payee info matches your information within your broker profile.

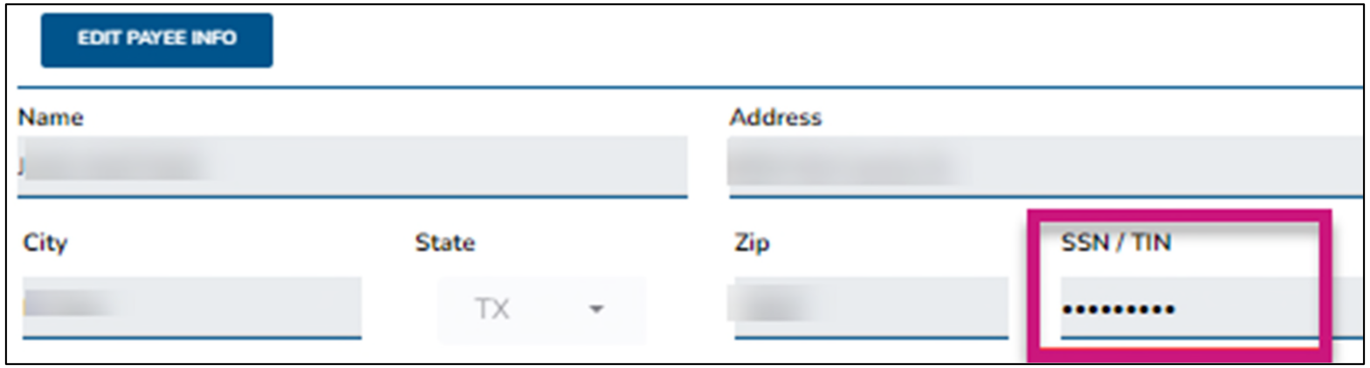


My Account

Payee Info – Create a Payee Profile

To declare a private company as your payee, select the **Edit Payee Info** button and update the information to reflect that of your company.

- Name = Name of the business / private company
- Address = Shipping Address
- SSN / TIN = the TIN of the business / private company
- Then select **Save**
- A prompt will display to complete a new W9.

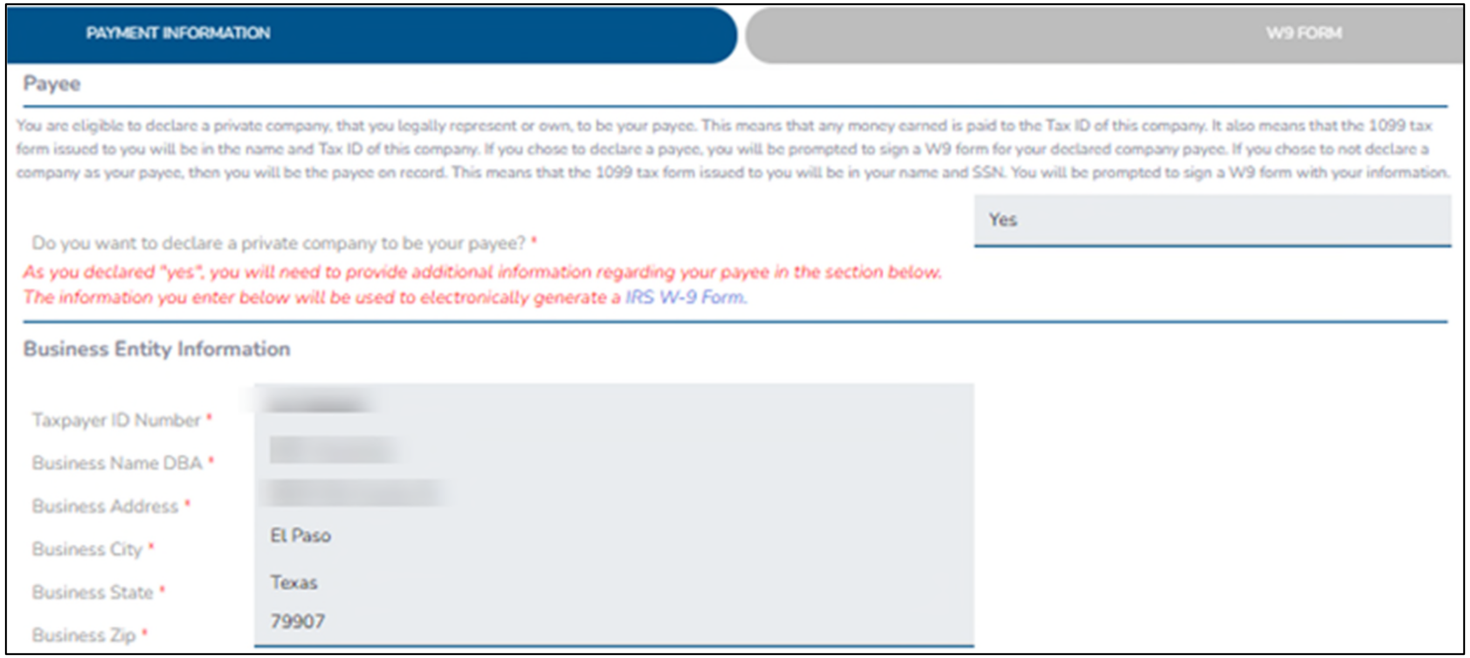


Note: When you declare a private company to be your payee, your 1099 will be in the name of this entity.
A Tax ID can only be used once as a Payee. Two brokers cannot share a Payee Profile.

My Account

Payee Info – Create a Payee Profile, Cont.

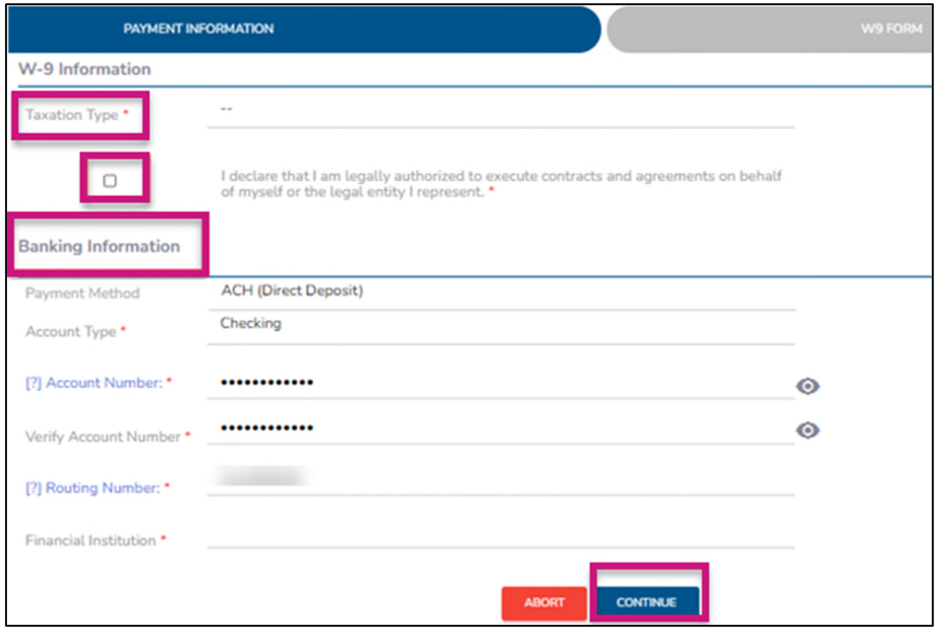
- The Business Entity Information will be prefilled from what was entered under the Edit Payee Info button
- To make any adjustments, edit these fields



My Account

Payee Info – Create a Payee Profile, Cont.

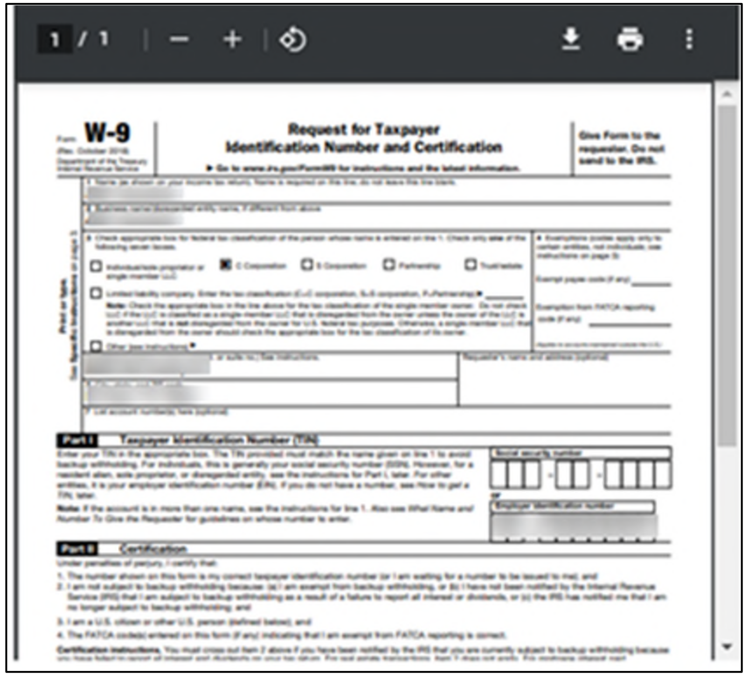
- Once the Business Entity Information is accurate, scroll down to the W-9 Information
- Assign the appropriate taxation type for your private company
- It is required to check the box, acknowledging that you are legally authorized to execute contracts and agreements on behalf of the company
- Proceed to the Banking Information and complete all required ACH fields
- Select **Continue**



My Account

Payee Info – Create a Payee Profile, Cont.

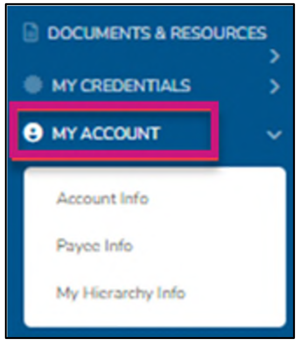
- The copy of the updated W-9 will populate
  - Download a copy at this time
- The final steps are to acknowledge the W9 is accurate and complete your signature
- Select the **Submit** button
- The workflow will be completed, and your Payee Info will be updated



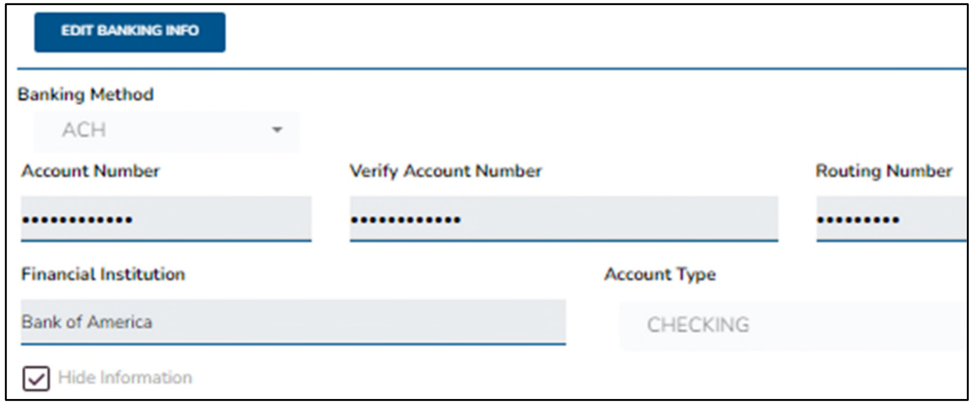
My Account

Payee Info – Edit Banking Info

If you are receiving your own commissions, edit your Banking Information to ensure ACH deposits go into the right account.



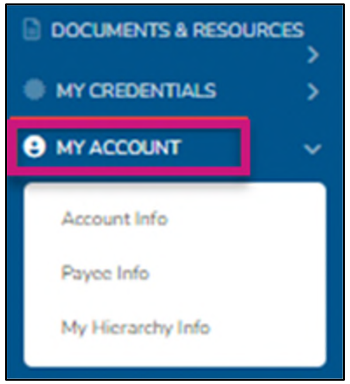
- Select the **Edit Banking Info** button and the fields will become editable to make changes.
- Uncheck the **Hide Information** box and the Account/Routing Numbers will become visible.



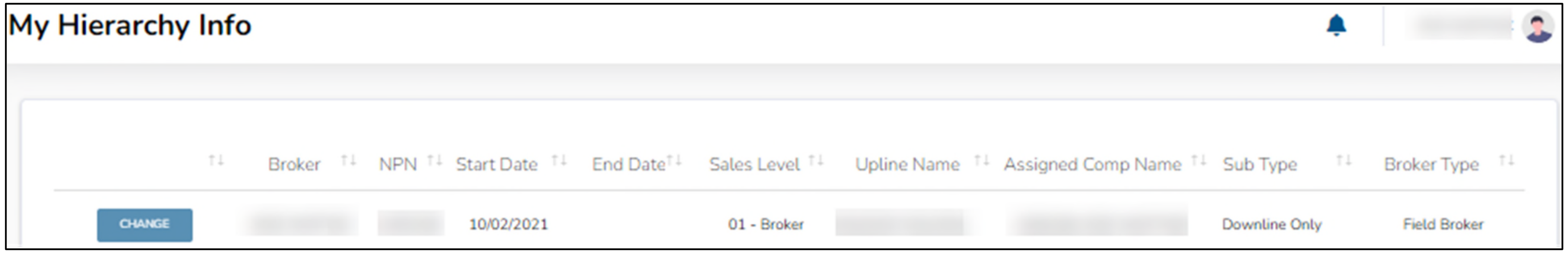
My Account

My Hierarchy Info

The My Hierarchy Info tab provides a snapshot of the level, upline information (if applicable), compensation assignment, Sub Type, and Broker Type.



- This tab will also provide upline history and the time spans where you were reporting to a different upline or were a different sub type.
- To make a change to your upline or compensation assignment, please select the **Change** button.

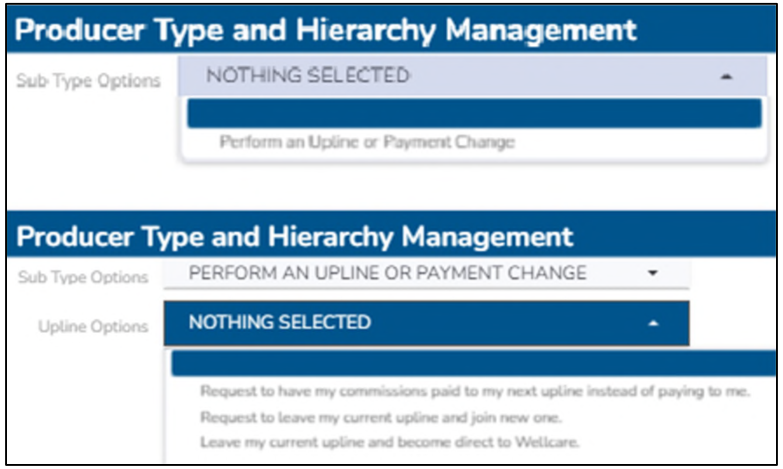


My Account

My Hierarchy Info – Make Changes

- Once the Change button has been selected, a new window will open
- The summary of the current situation will populate to confirm the current set up
- Select the **Perform an Upline or Payment Change** option from the drop-down menu
- Select from the following options:
  - Request to have my commissions paid to my next upline instead of paying to me
  - Request to have my commissions paid to me instead of to my next upline
  - Request to leave my current upline and join a new one
  - Leave my current upline and become direct to Wellcare

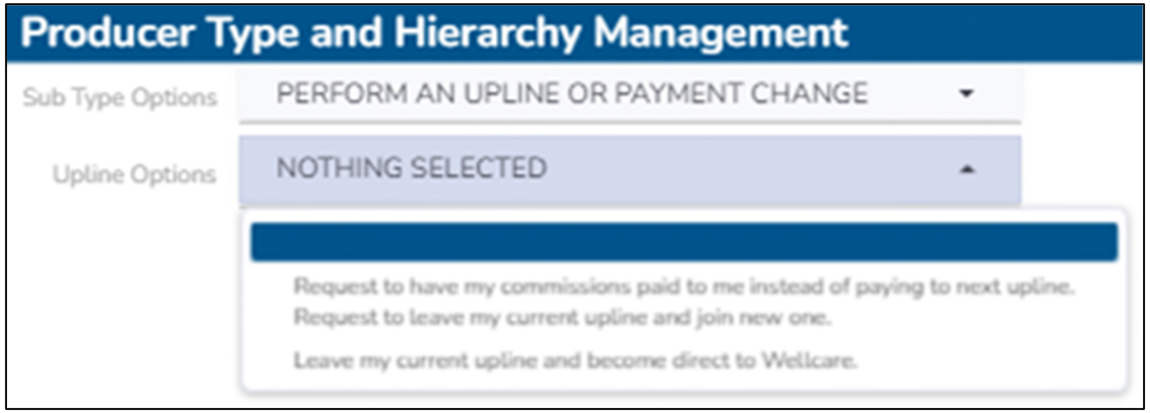
Note: The options available will be dependent on current subtype

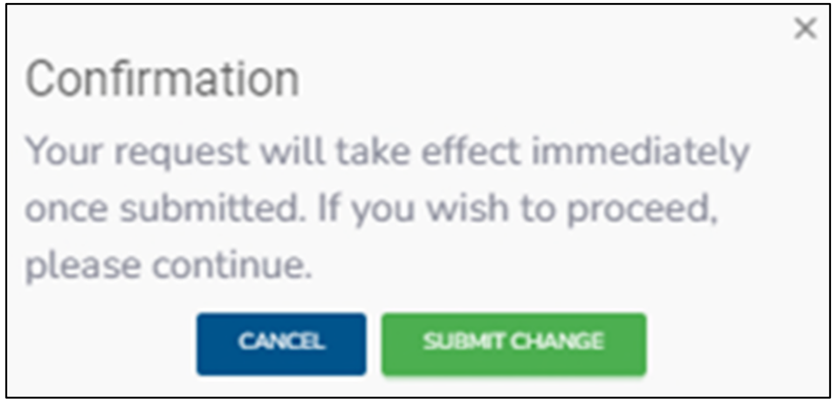


My Account

My Hierarchy Info – Make Changes, Cont.

- If the commission assignment is changed to self, a prompt will display to complete a W9 and provide ACH information.
- If a request to go Direct to Wellcare is selected, the request will process immediately.
  - If the previous subtype was Dual Assignment, it will also be required to complete a W9 and provide ACH information



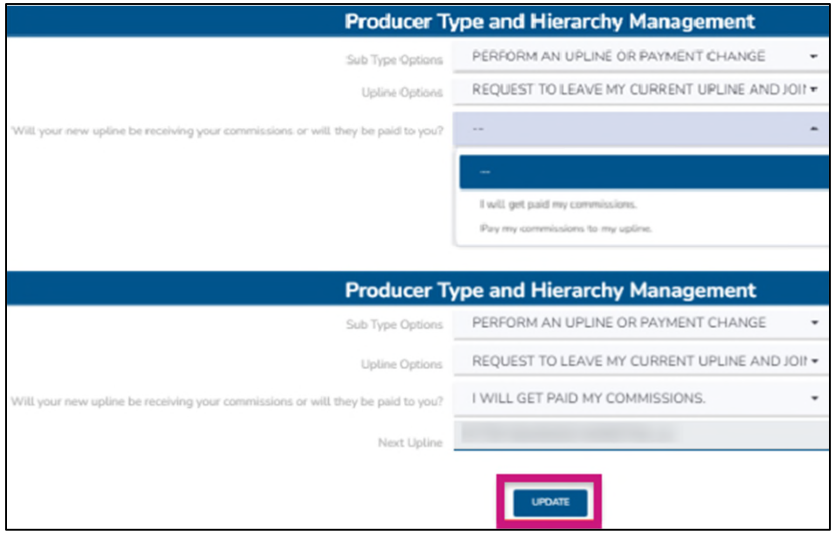


My Account

My Hierarchy Info – Make Changes, Cont.

- For a request to change your hierarchy, determine if you will receive your own commissions or if they will be assigned to your new requested upline
- Provide the name or NPN of this requested upline
- Once the correct next upline is selected, select **Update**

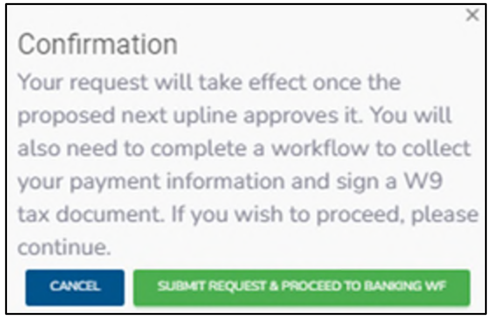
Note: If you are an LOA Field Broker, you must first request to be released from the LOA subtype. Please contact Sales Support or your upline for assistance to process these changes.



My Account

My Hierarchy Info – Make Changes, Cont.

- Select **Update**, then confirm to submit this request to the new proposed upline.
- The proposed upline will receive a request within their own portal to either accept or deny your request to join their hierarchy.
- If they accept, your hierarchy information will update as of the accepted date.
- If they deny, your current hierarchy information will remain active. Submit a new change request.



- Once the request is submitted, your current hierarchy line will update to Request Pending, and you will not be able to submit additional changes.
- To view more details about the submitted request, select **Request Pending** to be directed to Workflows. Cancel the request is an option from this window as well.

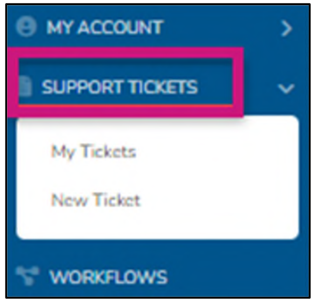
	Broker	NPN	Start Date	End Date	Sales Level	Upline Name	Assigned Comp Name	Sub Type	Broker Type
Request Pending			10/01/2021		01 - Broker			Dual Assignment	Field Broker

Support Tickets

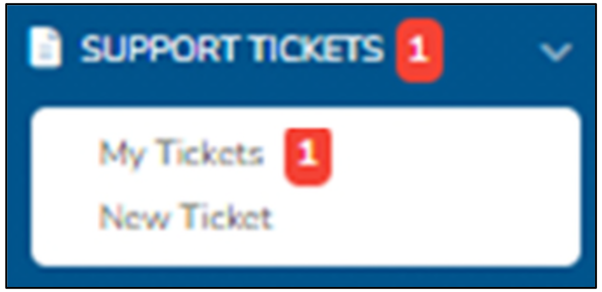
Support Tickets

My Tickets

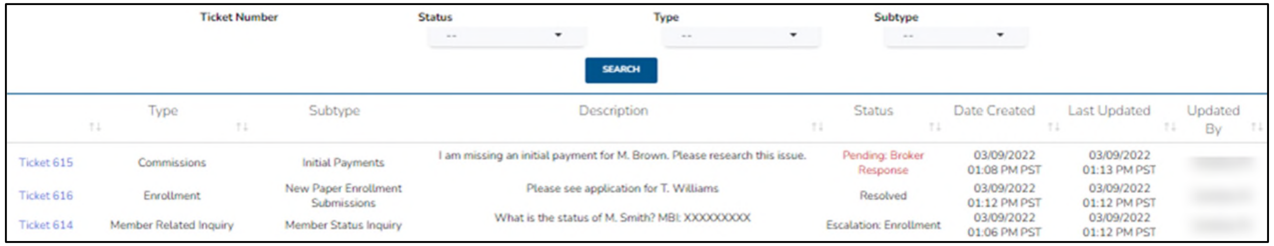
The My Tickets tab allows the tracking of the status and responses on all inquiries submitted.



- If there is an action item, there will be a red number next to My Tickets



- Use the following criteria to filter down the results: Ticket Number, ticket status, ticket type, and ticket subtype
- Tickets will automatically be filtered to show any **Pending Broker Response** tickets at the top



	Type	Subtype	Description	Status	Date Created	Last Updated	Updated By
Ticket 615	Commissions	Initial Payments	I am missing an initial payment for M. Brown. Please research this issue.	Pending: Broker Response	03/09/2022 01:08 PM PST	03/09/2022 01:13 PM PST	[illegible]
Ticket 616	Enrollment	New Paper Enrollment Submissions	Please see application for T. Williams	Resolved	03/09/2022 01:12 PM PST	03/09/2022 01:12 PM PST	[illegible]
Ticket 614	Member Related Inquiry	Member Status Inquiry	What is the status of M. Smith? MBI: XXXXXXXXX	Escalation: Enrollment	03/09/2022 01:06 PM PST	03/09/2022 01:12 PM PST	[illegible]

Support Tickets

My Tickets – Ticket Statuses

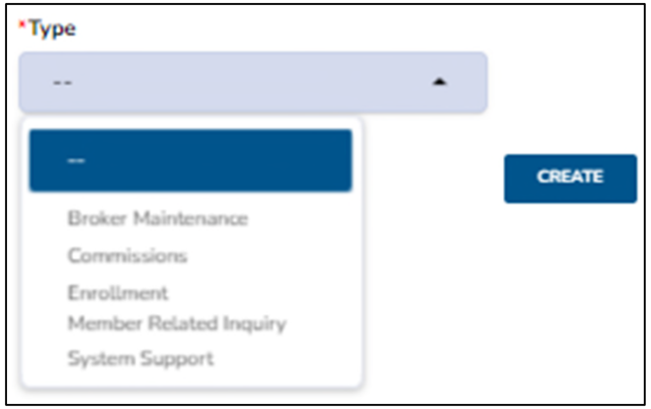
The My Tickets tab allows to track the status and responses on all inquiries submitted.

Status	Status Meaning
Resolved	Your inquiry has been worked and is resolved. The ticket is closed.
Pending Resolver	Your inquiry has been submitted and is in the queue to be assigned to a Sales Support rep.
Pending Broker Response	Sales Support requires additional information from you to resolve your inquiry.
Escalation: Enrollment	Your inquiry has been sent to Accounts Payable. Once they provide a response back to Sales Support, we will resolve your inquiry.
Escalation: Accounts Payable	Your inquiry has been sent to Accounts Payable. Once they provide a response back to Sales Support, we will resolve your inquiry.
Escalation: IT Solutions Team	Your inquiry has been sent to IT. Once they provide a response back to Sales Support, we will resolve your inquiry.

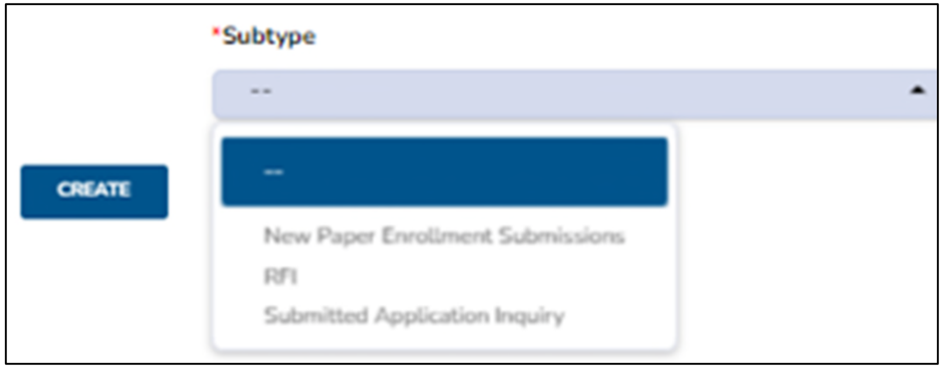
Support Tickets

New Ticket

To create a new ticket, select the ticket type for your inquiry.



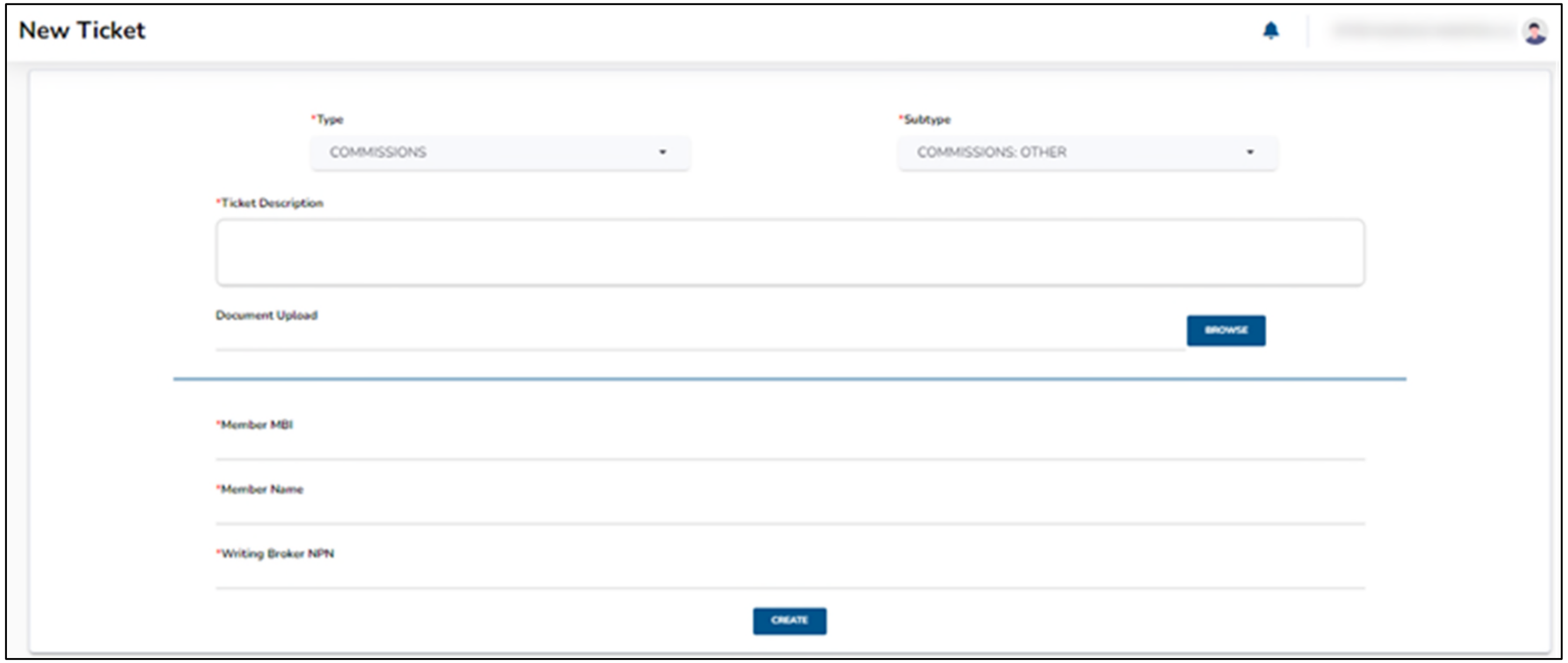
- Once the ticket type is selected, the ticket subtype can then be selected
  - This is a more specific description of your inquiry



Support Tickets

New Ticket, Cont.

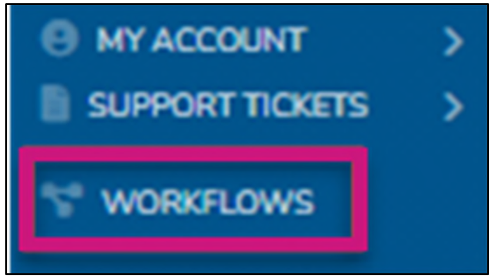
- Every ticket type requires a description
  - This is an open field to enter in details about the inquiry
- Depending on the subtype, specific data points will be required to submit the ticket
- For every inquiry, please provide as much information as possible so that Sales Support can best assist you!
- Once all requirements are completed, select **Create** to submit your inquiry



Workflows

Workflows

The Workflows tab tracks all cases that have been created by or assigned to you.



- Workflows include: completing a new W9, requesting a hierarchy change, becoming a principal of an agency, etc.
- Filter Workflows by Status and Type
- Track when the Workflow was last updated and who is the assigned approver
- Approve or deny hierarchy change requests

CENTENE Workbench

Questions?

wellcare