CENTENE
Workbench

wellcare

Centene Workbench: Hierarchy Level Portal Overview

Last updated: Apr 2022- RDT

Introduction

This document reviews the Hierarchy Level Portal of Centene Workbench. The processes covered are a breakdown of the portal functions, self-service Workflows, ticketing system, principal/agency relationship within portal, sending invites, downline tracking and more.

Icon Use

Icon	Function
	Return to Table of Contents

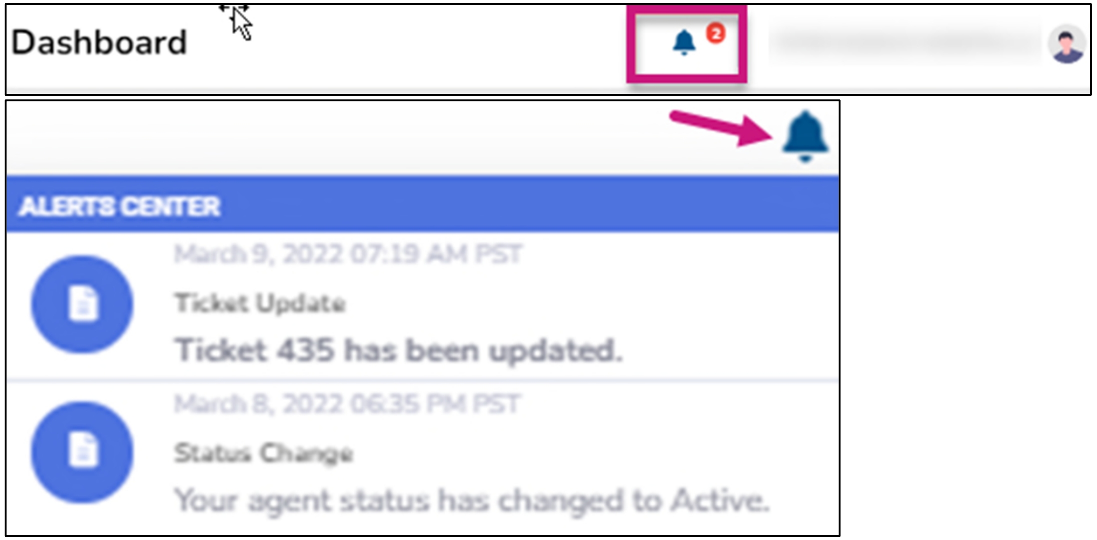
Table of Contents

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



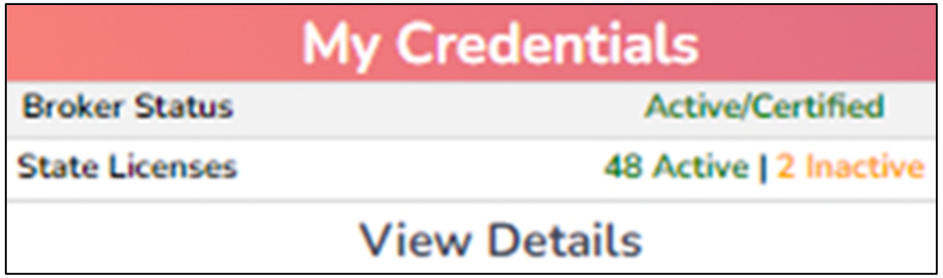
Dashboard

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

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



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

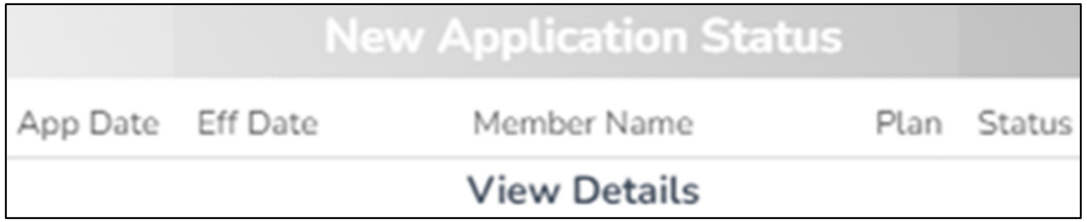
Dashboard

Widgets

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

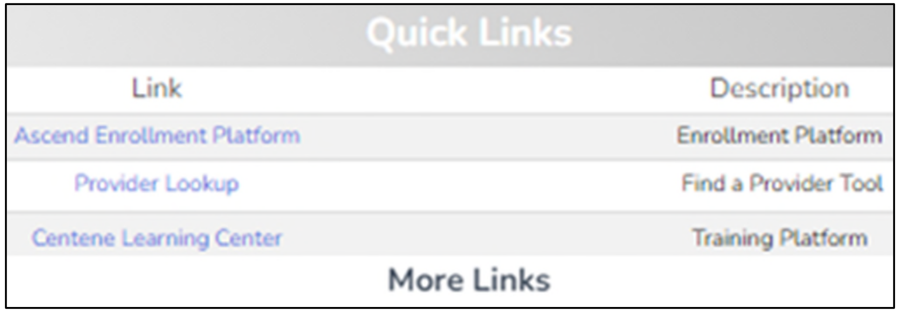
3. **New Application Status**
   Provides a summary of recently submitted applications

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



New Application Status				
App Date	Eff Date	Member Name	Plan	Status
View Details				

4. **Quick Links**
   Provides a quick access to the most commonly used links



Quick Links	
Link	Description
Ascend Enrollment Platform	Enrollment Platform
Provider Lookup	Find a Provider Tool
Centene Learning Center	Training Platform
More Links	

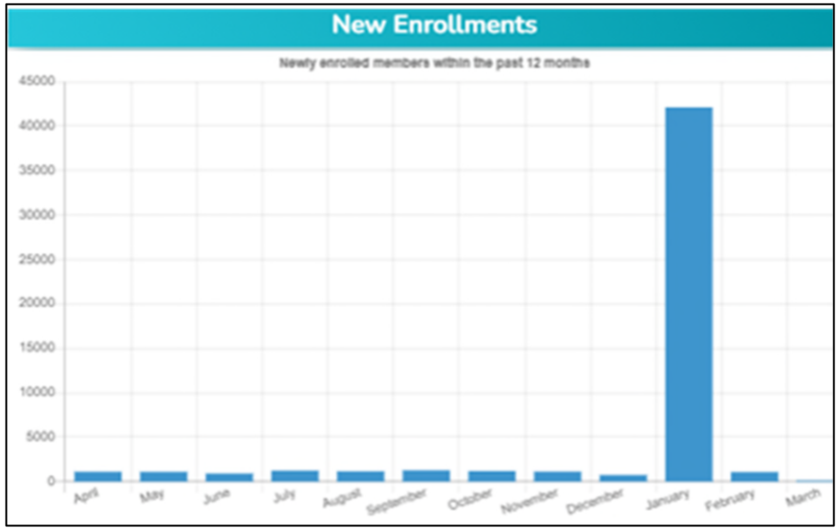
Dashboard

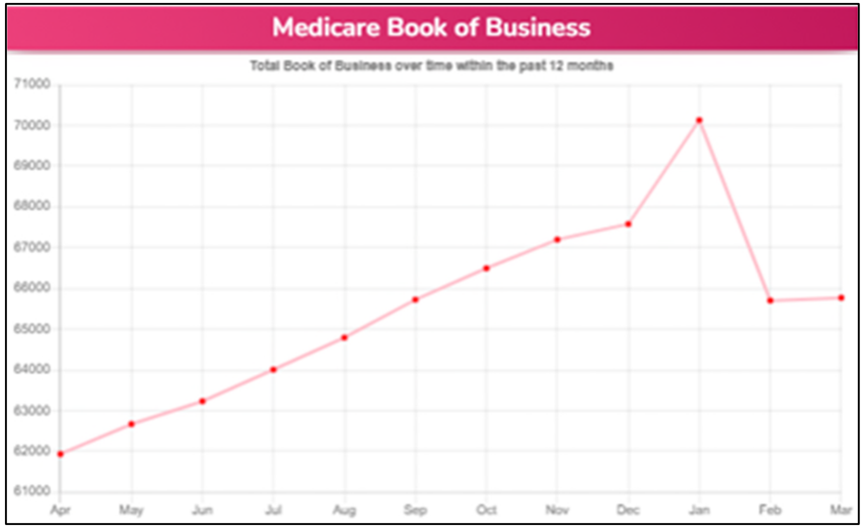
Widgets

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





Dashboard

Widgets

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

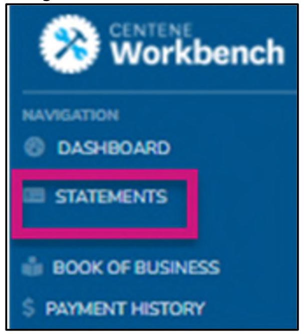
7. My Downline’s Credentials

   Provides a status for downline brokers and provides a status for the downline licenses

Statements

Statements

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



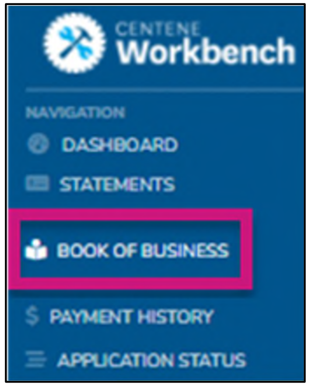
- Once a statement is published, a new row with all details pertaining to that specific payment will display
- To view the entire statement, select the blue **Excel** button
  - The statement extract will then download
- Once a statement has been sent to AP and paid, the following columns will update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

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

Book of Business

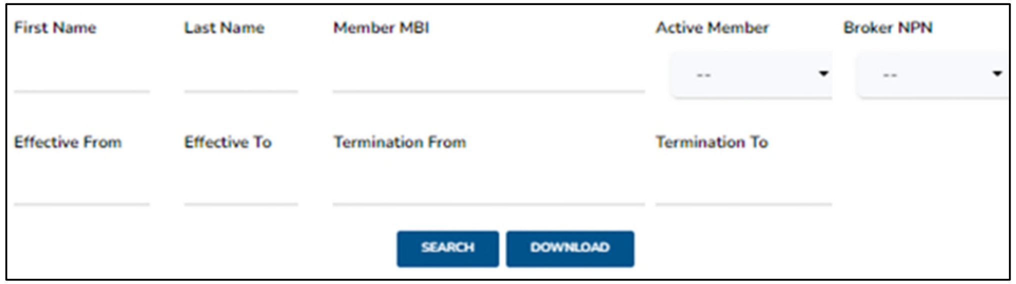
Book of Business

The Book of Business tab will display all members where you are the broker of record. It will also show all members belonging to your downlines.



- 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
- The option to look up specific members and/or payment related to a specific downline NPN is also available

SEARCH DOWNLOAD

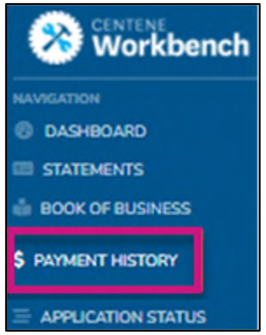
Search:

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

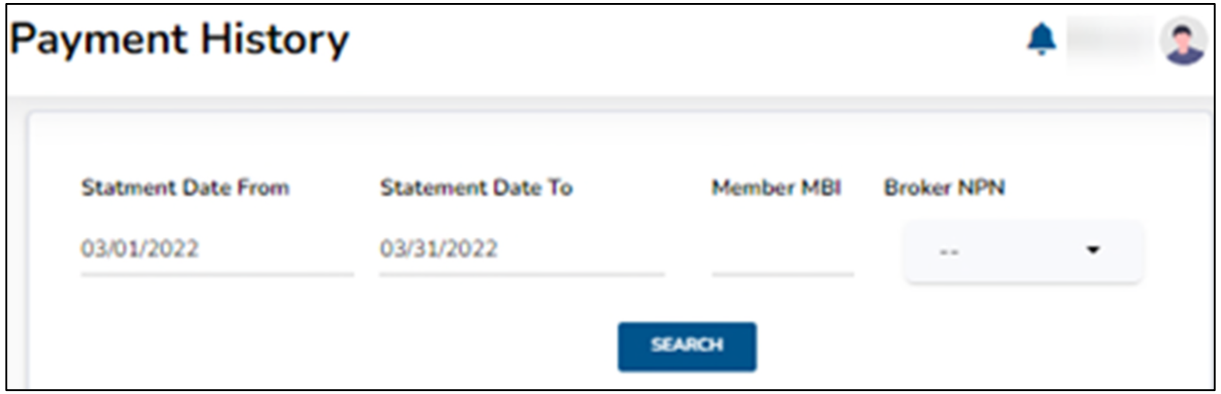
Payment History

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 either a Member MBI, Broker NPN, or both and select **Search**
- All Payments that were issued pertaining to that Member during the specified date range will generate
- Then Download to CSV

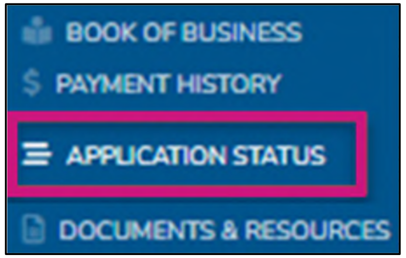


Member MBI	First Name	Last Name	Broker NPN	Broker Name	Statement Date	Batch ID	Statement Number	Amount	Payment Type	Payment Date	Payment ID

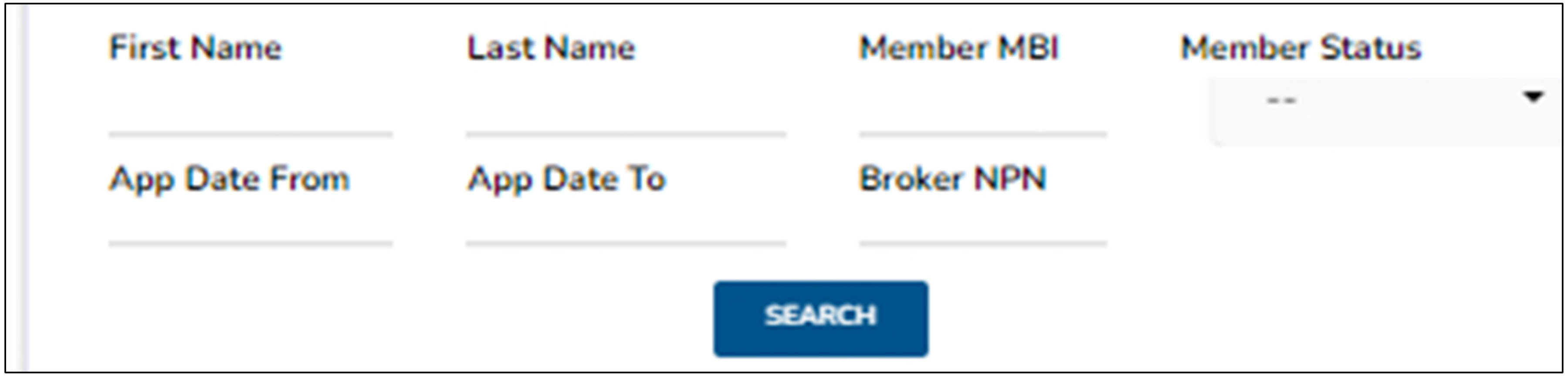
Application Status

Application Status

Application Status allows tracking of all broker of record submitted applications.



- 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:

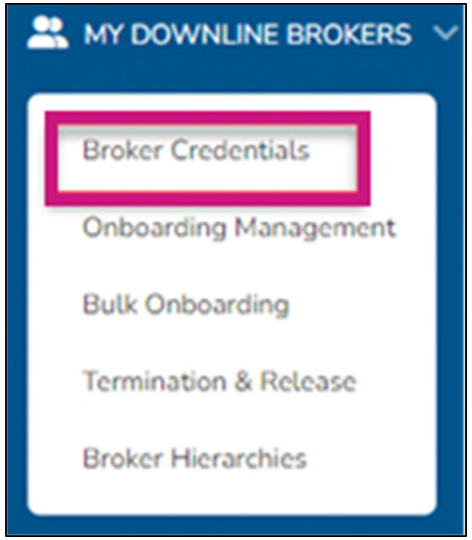
App ID	Member MBI	App Sign Date	Effective Date	First Name	Last Name	Status	Reason	Broker NPN	Broker Name
[illegible]	[illegible]	02/07/2022	03/01/2022	DOLORES	[illegible]	Enrolled-Active		[illegible]	[illegible]
[illegible]	[illegible]	02/12/2022	03/01/2022	NATHANIEL	[illegible]	Future Enroll		[illegible]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

My Downline Brokers

My Downline Brokers

Broker Credentials

- The Broker Credentials tab allows the download of different reports for downline brokers
- There are five separate reports that can be downloaded
- By using the Broker NPN or Broker Name search features, you can generate data for a specific downline broker



My Downline Brokers

Broker Credentials, Cont.

Types of Reports:

Broker Status

- This allows the download a list of your downline brokers status (active, suspended, etc.).

License Info

- This allows the view of all licenses that your downline brokers hold. The report provides resident and non- resident markers as well as the expiration dates.

Training Info

- This allows the view of what percentage of training has been completed for your downline brokers.

Contract Info

- Contract info provides information on your downlines contract status. This will be most useful during recertification if a contract addendum is required!

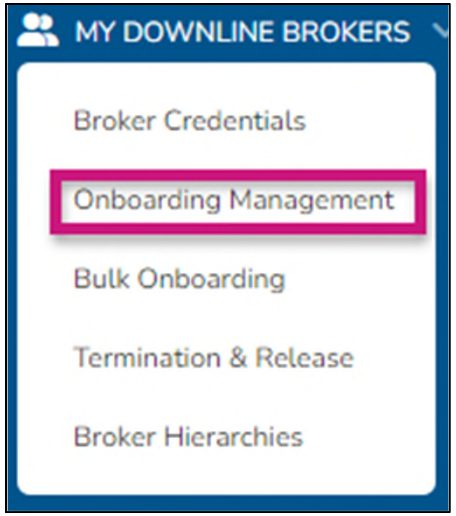
Appointment Info

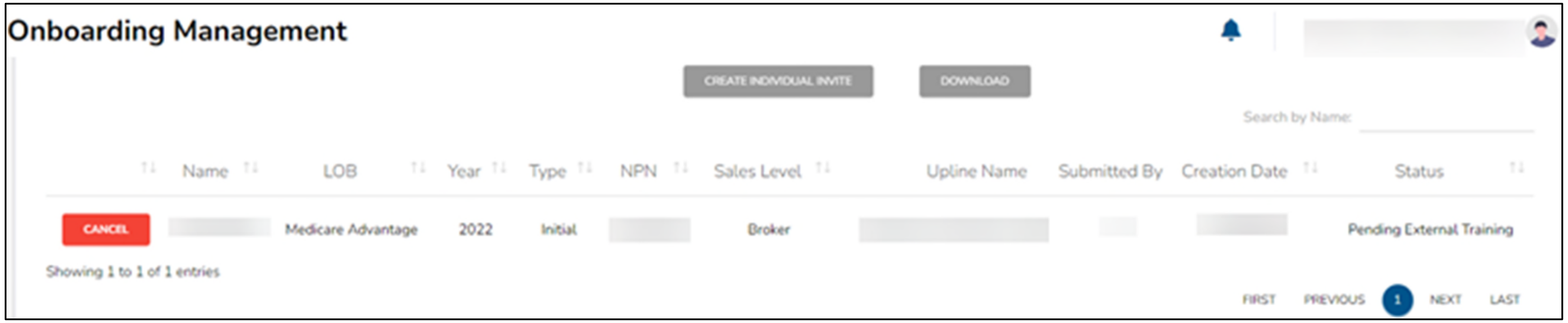
- This allows the view of the states that brokers have appointments in, along with the requirement for each state.

My Downline Brokers

Onboarding Management

Onboarding management gives the visibility to see pending and completed onboarding invites sent to brokers or agencies to join your downline.



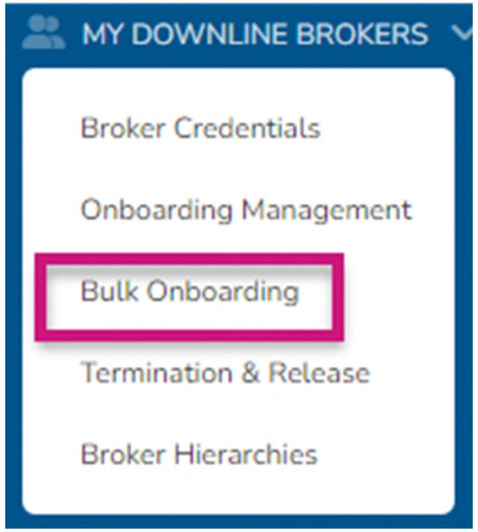


- Download the list of brokers or agencies into a CSV file
- Please refer to the How to Send Invites Guide for information on how to create individual invites

My Downline Brokers

Bulk Onboarding

Bulk onboarding allows several invites to be sent at one time.



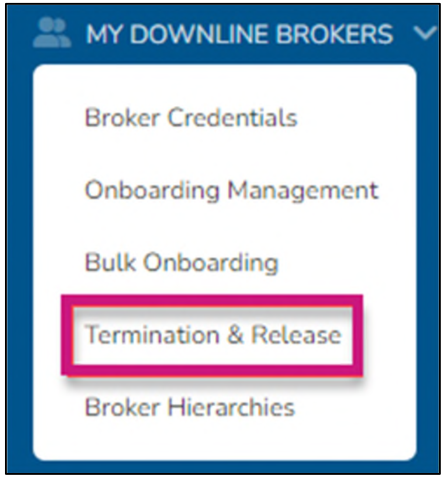
File	File Name	Status	Result	Successful Rows	Error Rows	User Name	Loaded
275	Copy of Worksheet in Bulk Invitations.xlsx	Pre Processed/Pending		0	0		02/18/2022 7:47 AM PST
274	Copy of Worksheet in Bulk Invitations.xlsx	Pre Processed/Pending		0	0		02/18/2022 7:46 AM PST

- View all bulk files that have been submitted along with which rows were successful and which rows populated an error
- Please refer to the How to Send Invites guide for information on how to create bulk templates and process bulk invites

My Downline Brokers

Termination & Release

Termination & Release allows the ability to remove brokers from your immediate downline.



- Allows the ability to view the brokers that have been released along with the date they were released on
- Brokers that are terminated will be eligible to re-contract
- Brokers that are released are moved Direct to Wellcare

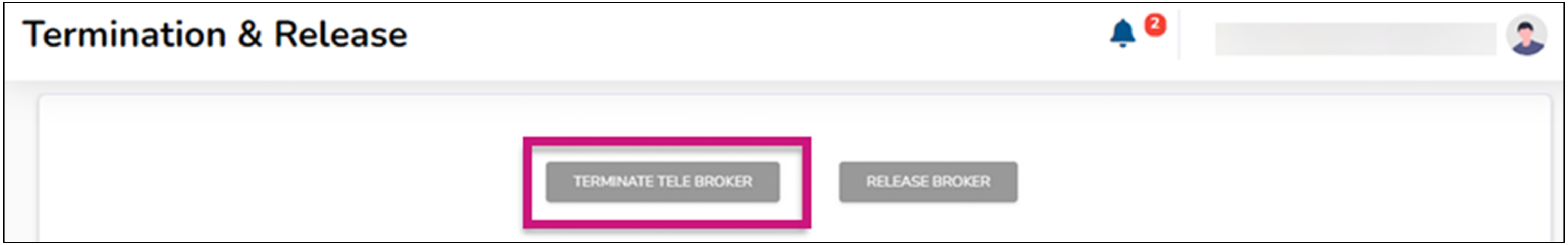
Note: Field Brokers cannot be terminated and Teledigital brokers cannot be released, and an Invalid Producer Type error will display.

My Downline Brokers

Terminate Tele Brokers

The Terminate Tele Broker option is to be used when terminating Teledigital brokers from your downline.

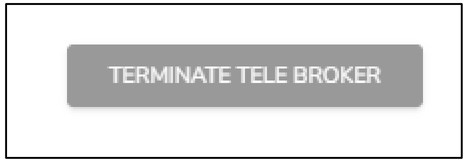
Note: You can only term brokers that have you as their immediate upline.



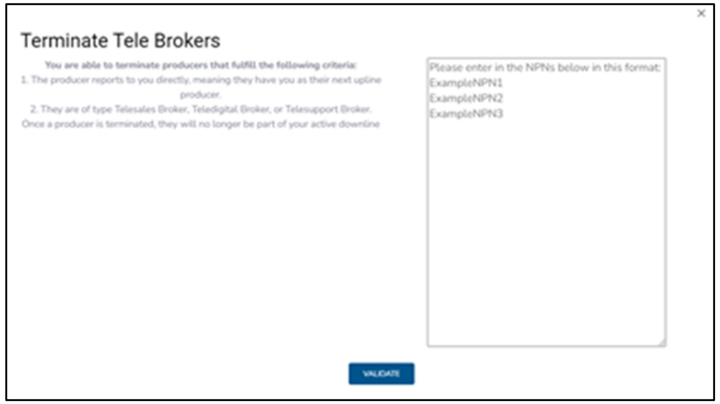
My Downline Brokers

Terminate Tele Brokers, Cont.

- To terminate Teledigital brokers select the tab labeled: **Terminate Tele Broker**



- Copy and paste in the NPN's for the brokers to be terminated. Select: **Validate**



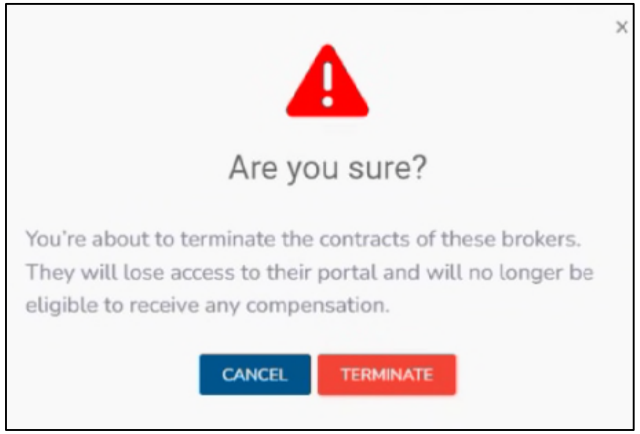
- The screen will update to display which brokers are eligible for termination

My Downline Brokers

Terminate Tele Brokers, Cont.

- Once termination eligibility has been confirmed, select: **Terminate**

- A final confirmation box popup will appear, select **Terminate** to complete the termination process



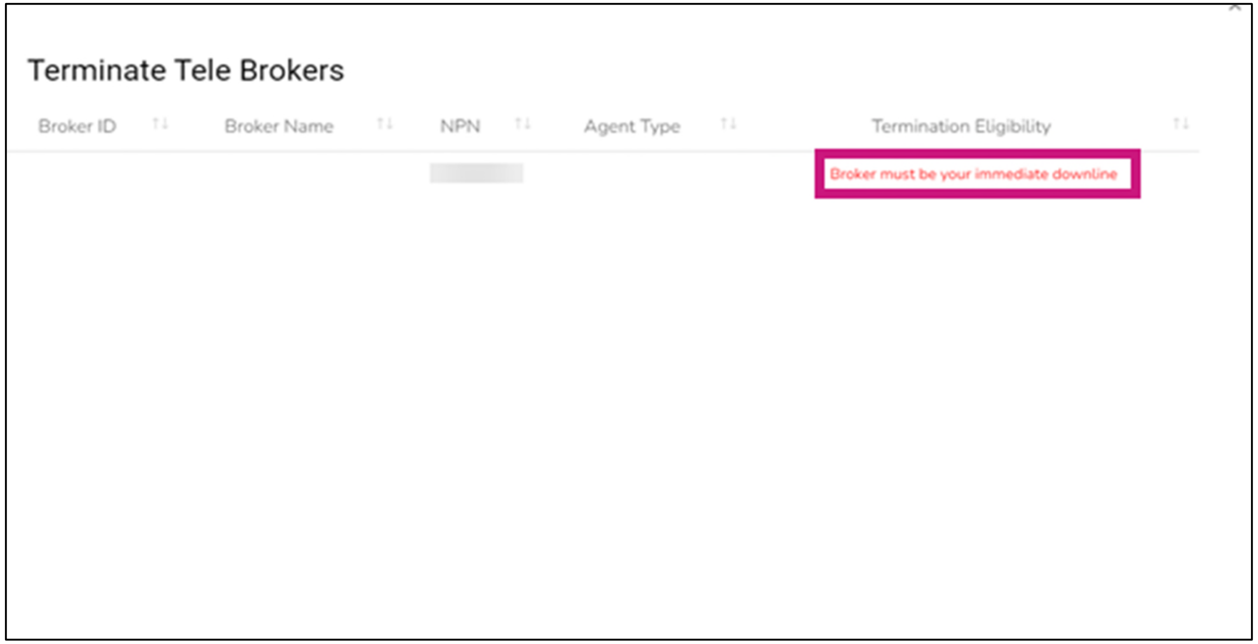
- A final confirmation screen will appear including all Teledigital broker terminations submitted, including the latest and all previous submissions

My Downline Brokers

Terminate Tele Brokers, Cont.

Terminating a Teledigital broker that is not in your immediate downline will cause the following error to display:

- Broker must be your immediate downline

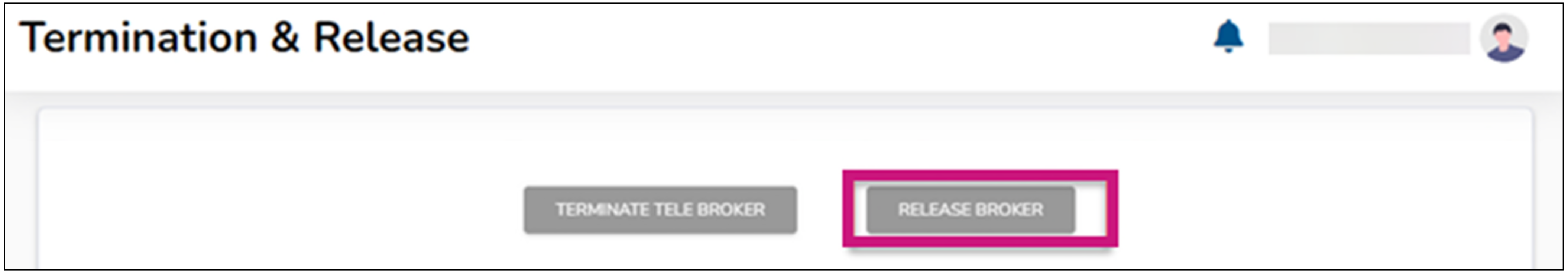


My Downline Brokers

Release Brokers

The Release Broker button is selected when releasing brokers from your downline.

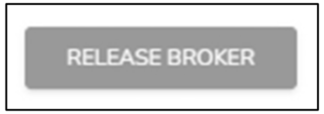
Note: Only release brokers that have you as their immediate upline.

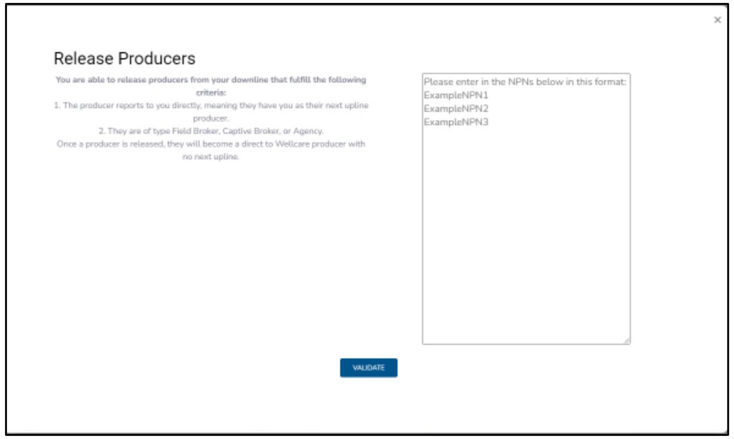


My Downline Brokers

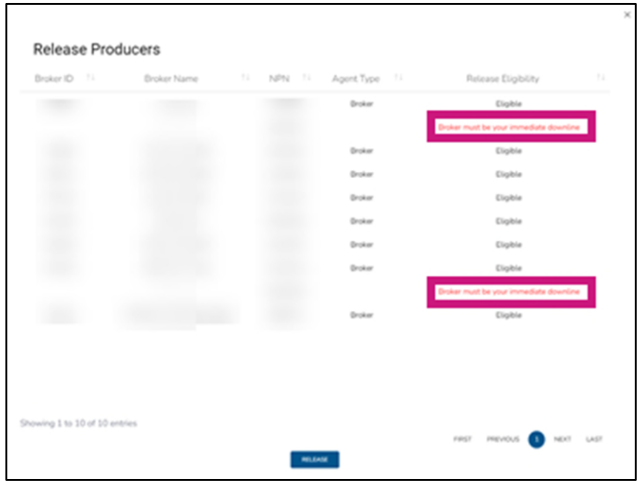
Release Brokers, Cont.

- To release brokers, select the **Release Broker** button





- Copy and paste in the NPN's for the brokers to be released. Select: **Validate**



- The screen will update to display which brokers are eligible for release

My Downline Brokers

Release Brokers, Cont.

- Once release eligibility has been confirmed, select **Release**

- A final confirmation screen will appear including all brokers that have terminations or releases submitted, including the latest and all previous submissions

My Downline Brokers

Release Brokers, Cont.

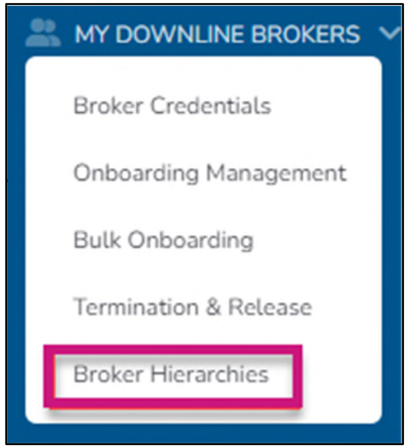
Attempting to release a broker that is not in your immediate downline will display the following error:

- Broker must be in your immediate downline

My Downline Brokers

Broker Hierarchies

The broker hierarchy tab allows to view all brokers in your downline providing visibility into their sub type, sales level, comp assignment, and next upline.



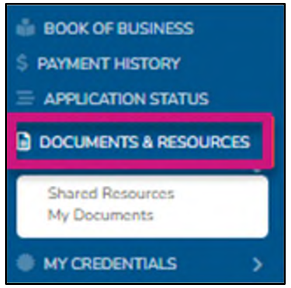
- Search by a specific downline NPN or broker name
- Search by specific sub types along with searching by specific sales levels

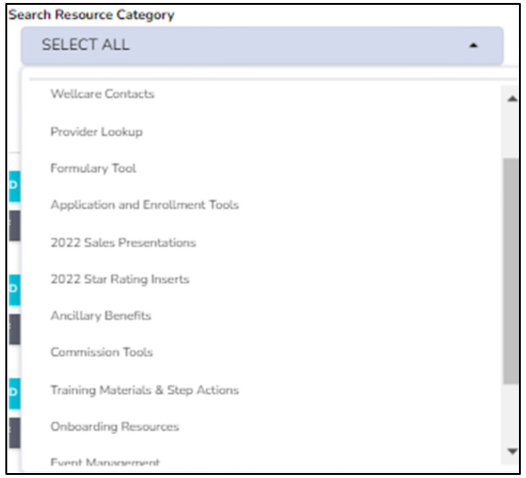
Documents & Resources

Document Resources

Shared Resources

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



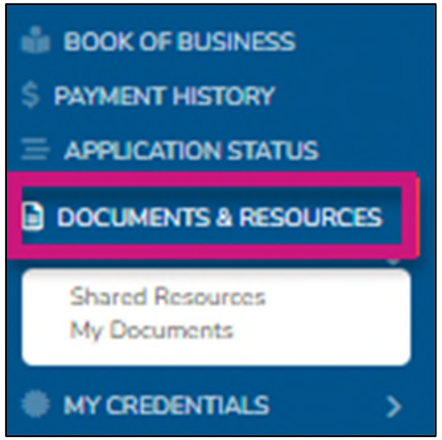


- Use the **Search Resource Category** option to look for specific document topics
- Use the open text Search field as an alternative
- If the resource is a PDF, view the document within the portal, or download it.

Document Resources

My Documents

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



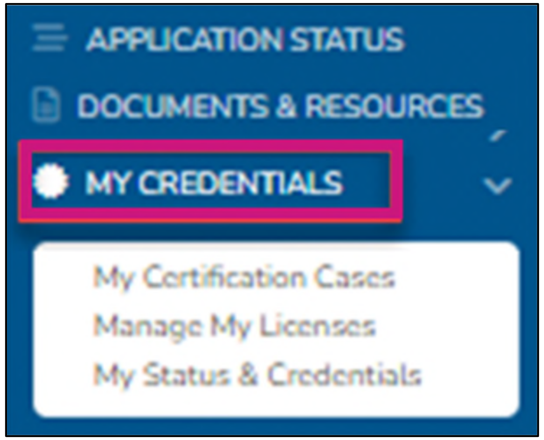
- Documents will include a copy of your Wellcare contract, W9s, any contract addendums that may be required in the future, etc.

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

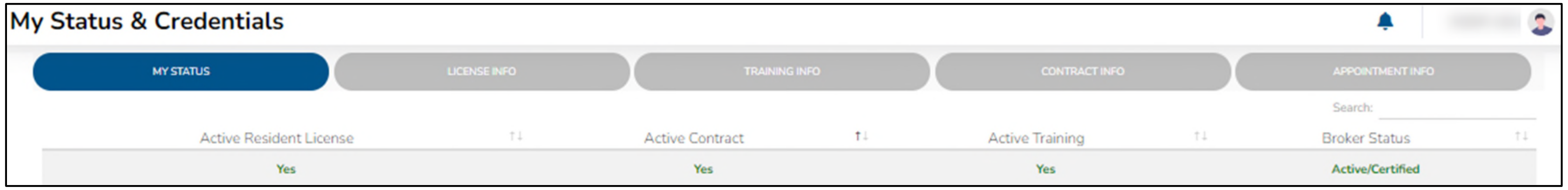
Manage My Licenses

- 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

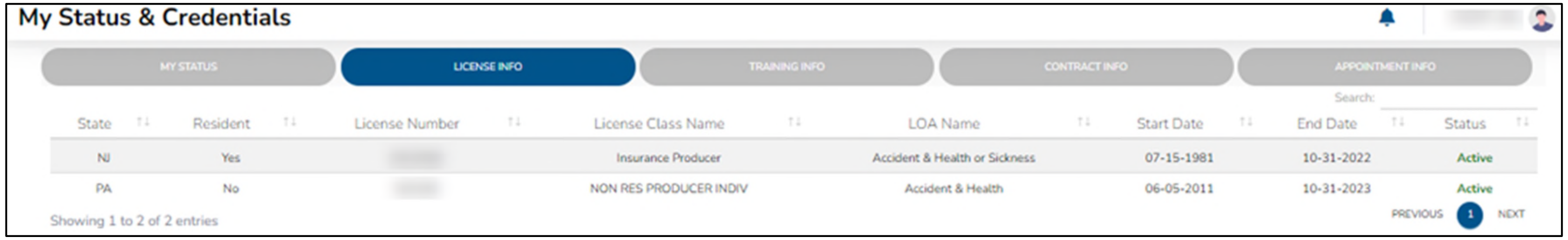
My Credentials

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.



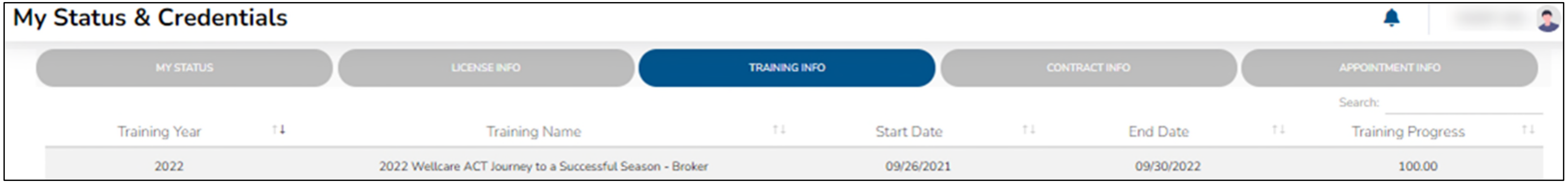
- Displays if the license is Resident or Non-Resident, the state of the license, the license number, the class and LOA name, the effective date and expiration dates, and the overall status of that license

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.

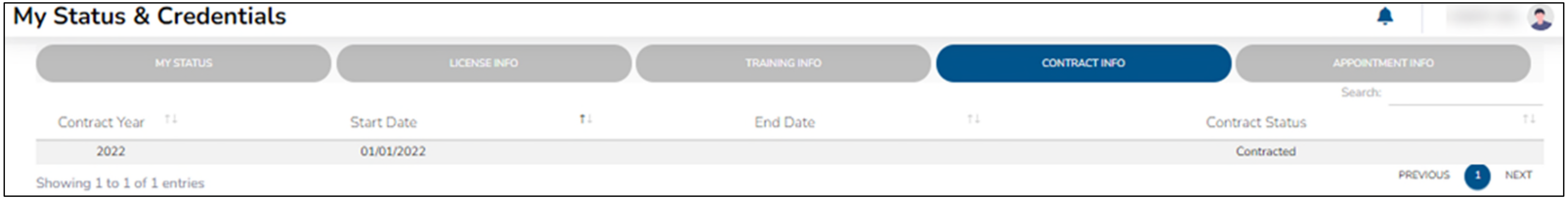


- Every year track progress through the Training Progress column.
- Training Progress Percent Breakdown:
  - 25% = AHIP Only Completed
  - 50% = AHIP + ACT Journey Completed
  - 75% = AHIP + ACT Journey & Product Completed
  - 100% = AHIP + ACT Journey & Product + ACT Exam (Passed)

My Credentials

My Status & Credentials, Cont.

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

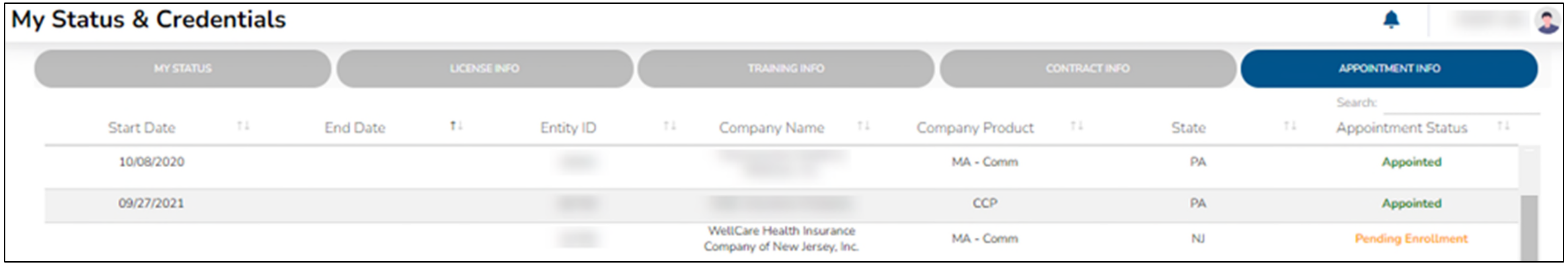


- The End Date will remain blank as long as the contract remains valid
- When there is a required contract addendum to acknowledge, a new line with the updated contract year and start date will display
  - The previous contract will be updated with an End Date

My Credentials

My Status & Credentials, Cont.

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


My Status & Credentials

MY STATUS | LICENSE INFO | TRAINING INFO | CONTRACT INFO | APPOINTMENT INFO

Search:

Start Date	End Date	Entity ID	Company Name	Company Product	State	Appointment Status
10/08/2020		[illegible]	[illegible]	MA - Comm	PA	Appointed
09/27/2021		[illegible]	[illegible]	CCP	PA	Appointed
		[illegible]	WellCare Health Insurance Company of New Jersey, Inc.	MA - Comm	NJ	Pending Enrollment

- 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

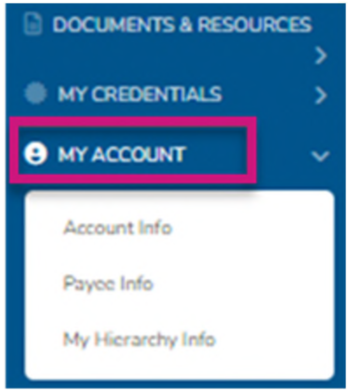
- Due to potential downline impact, any brokers that are level 10 – GA or higher are unable to terminate their contract
- If you wish to terminate your contract, please contact Sales Support

My Account

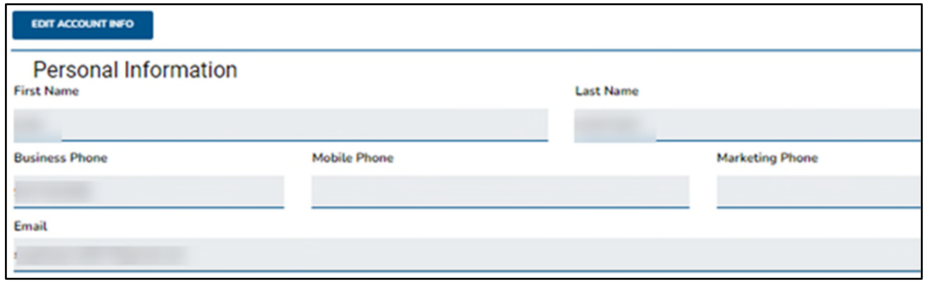
My Account

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 your email address



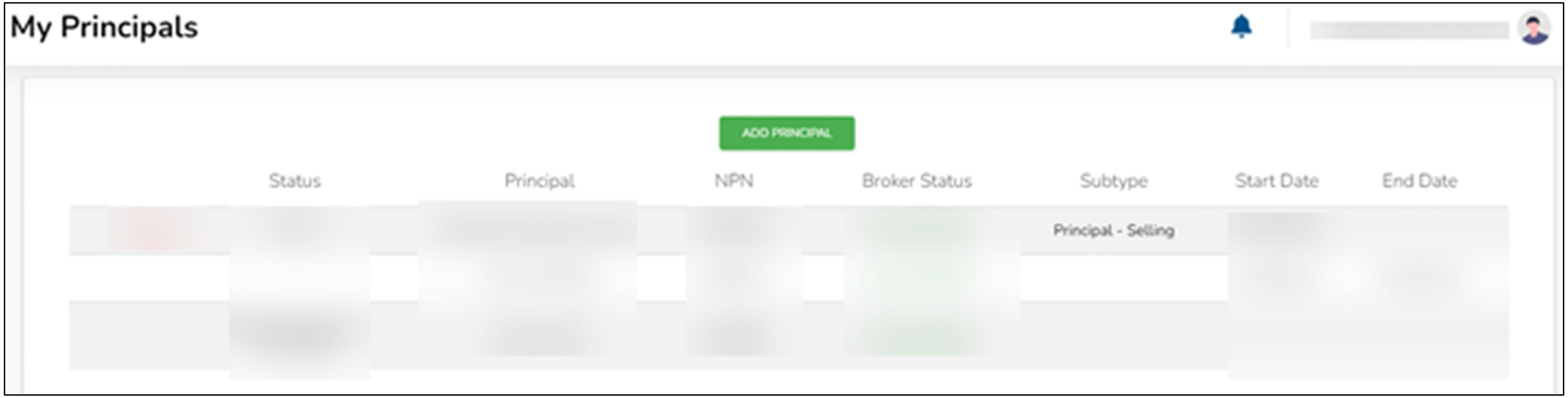
Note: Name and Business Address is pulled directly from NIPR and cannot be changed as it must match your license.

My Account

My Principals – Applicable to Agencies Only

The My Principals tab allows a view of all principals for your agency.

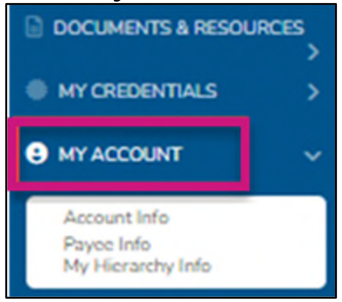
- View which principals are listed as the selling principal and non-selling principal
- Use the add principal button to invite a new principal
- View the start and end date for the principals along with if a request is pending, denied or approved



My Account

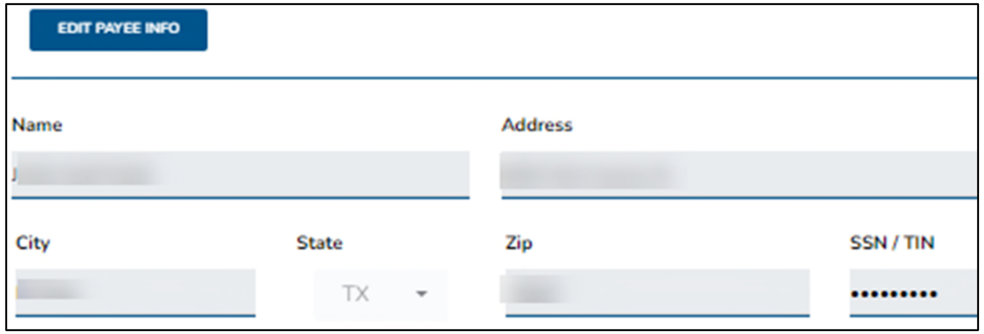
Payee Info

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. You must complete this W9 update for your changes to be saved.

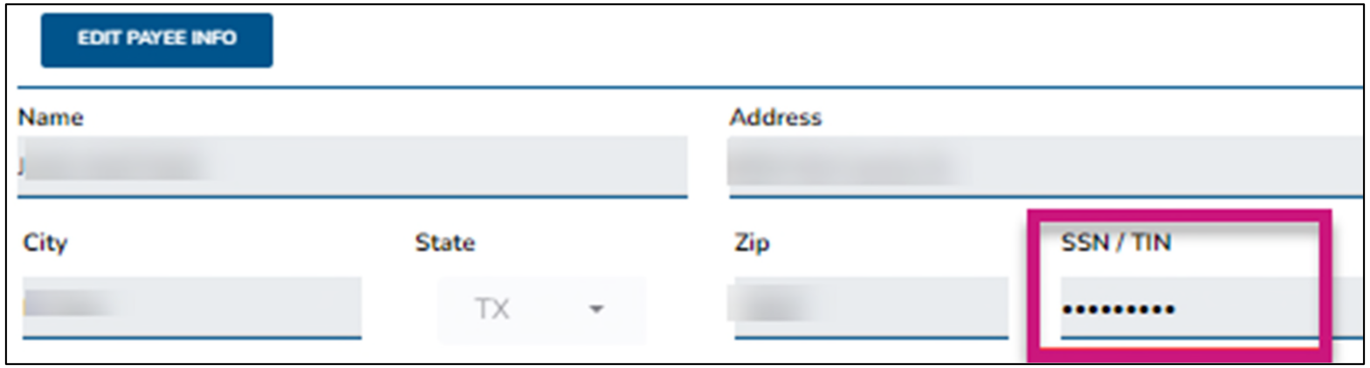


My Account

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

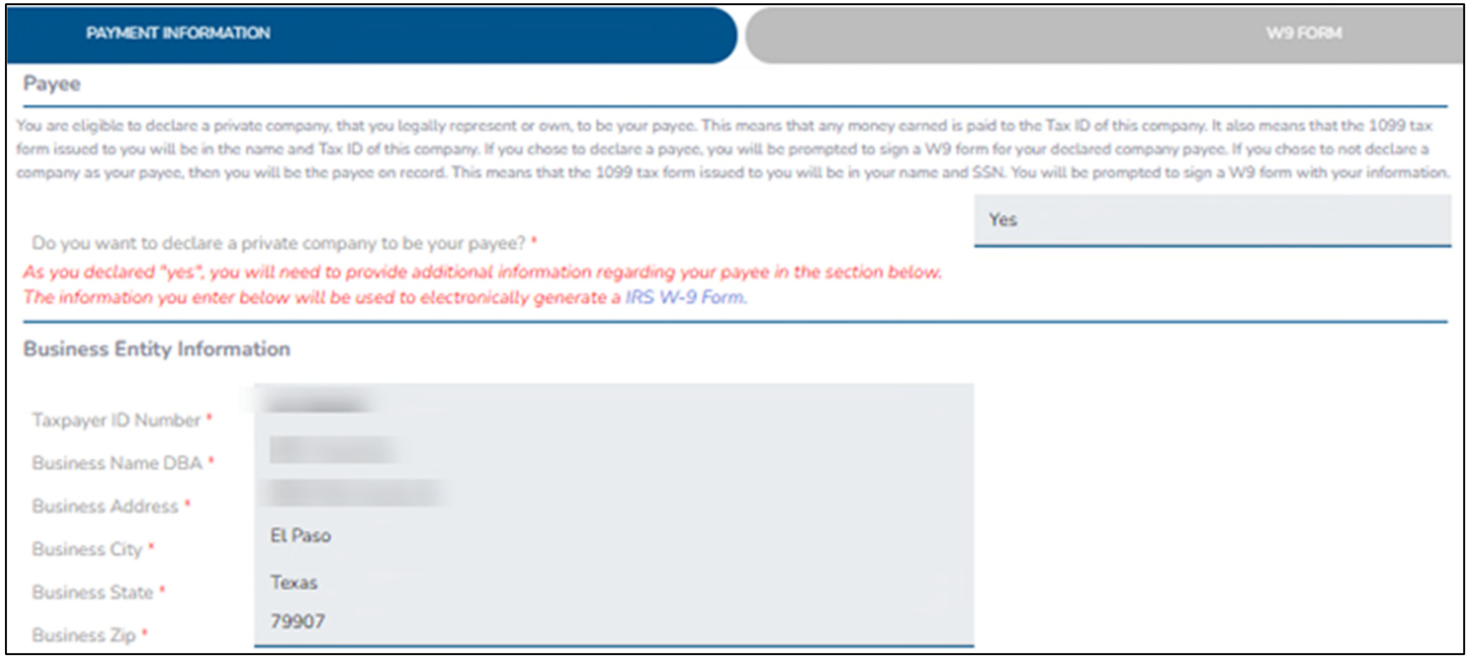


Note: When you declare a private company to be your payee, your 1099 will be in the name of this entity.
A Tax ID can only be used once as a Payee. Two brokers cannot share a Payee Profile.

My Account

Payee Info – Create a Payee Profile, Cont.

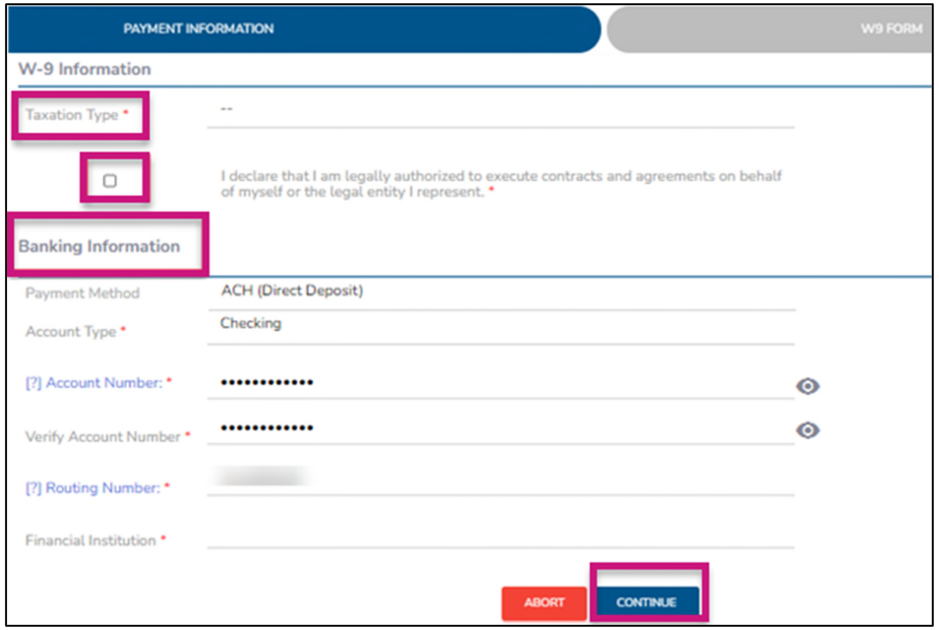
- The Business Entity Information will be prefilled from what was entered under the Edit Payee Info button
- To make any adjustments, edit these fields



My Account

Payee Info – Create a Payee Profile, Cont.

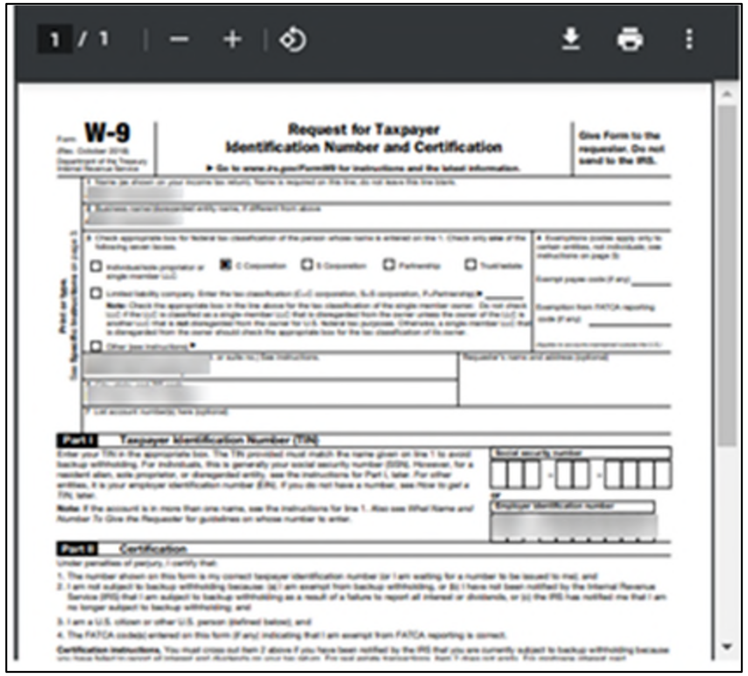
- Once the Business Entity Information is accurate, scroll down to the W-9 Information
- Assign the appropriate taxation type for your private company
- It is required to check the box, acknowledging that you are legally authorized to execute contracts and agreements on behalf of the company
- Proceed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

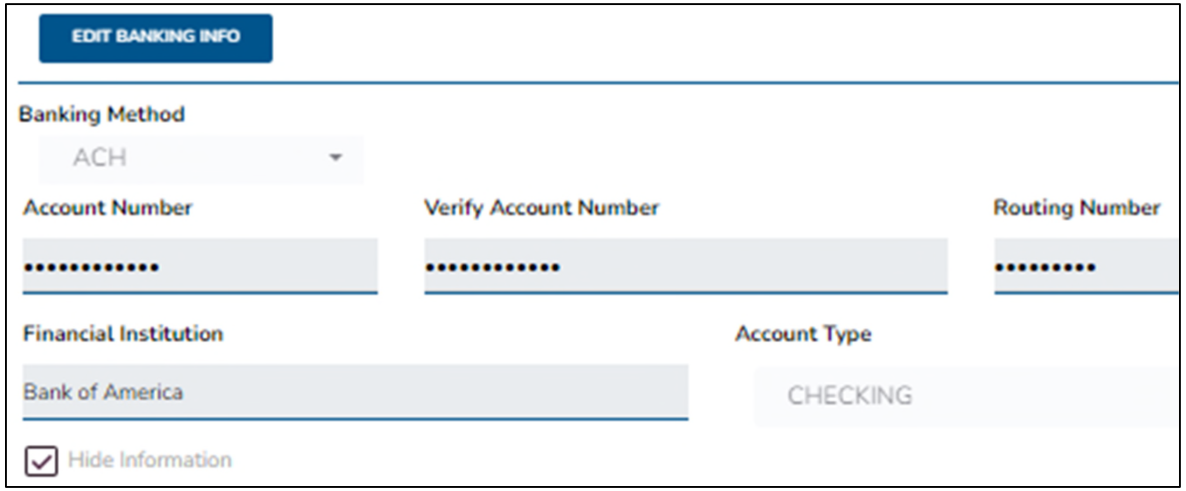


My Account

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.

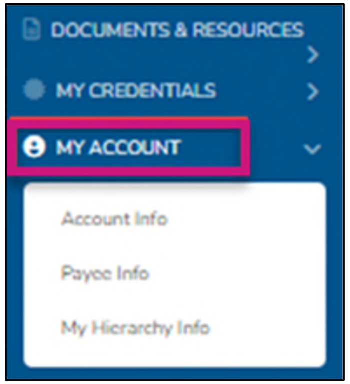
- Select the **Edit Banking Info** button and the fields will become editable to make changes.
- Uncheck the **Hide Information** box and the Account/Routing Numbers will become visible.



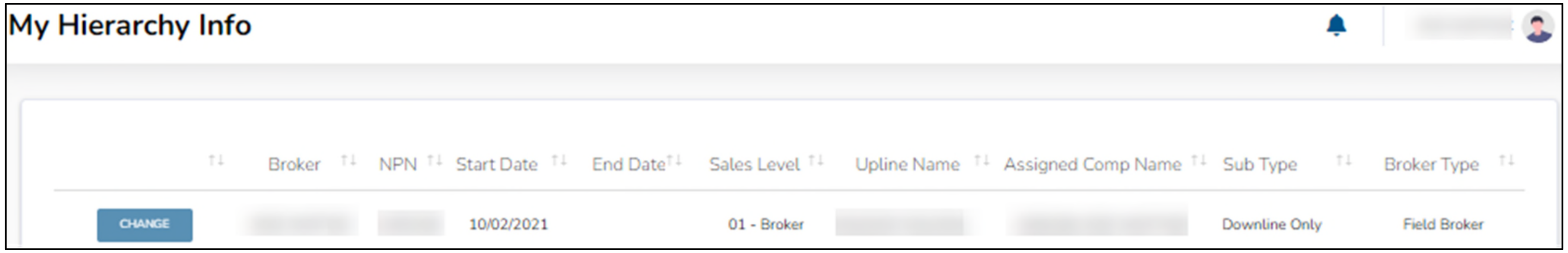
My Account

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.

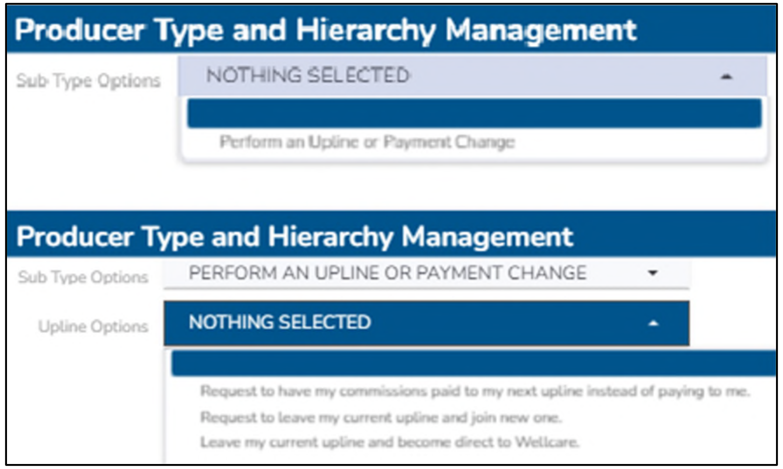


My Account

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

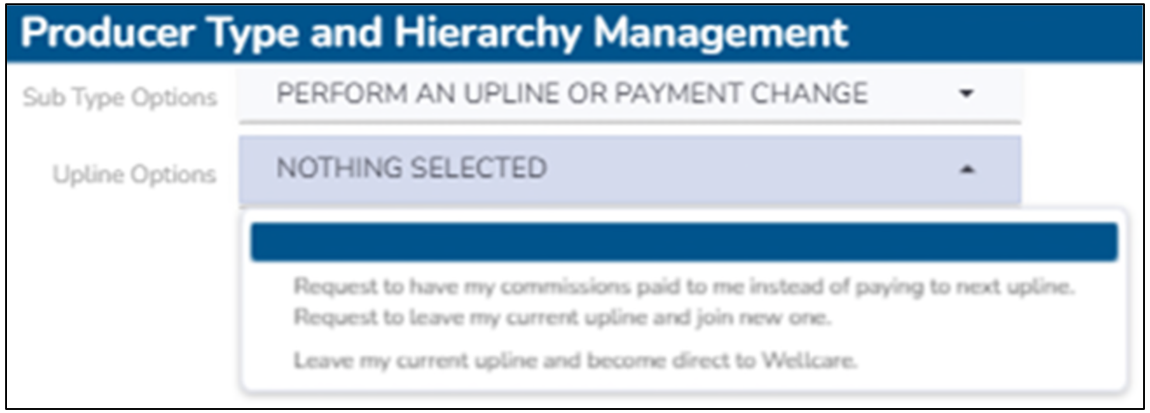
Note: The options available will be dependent on current subtype

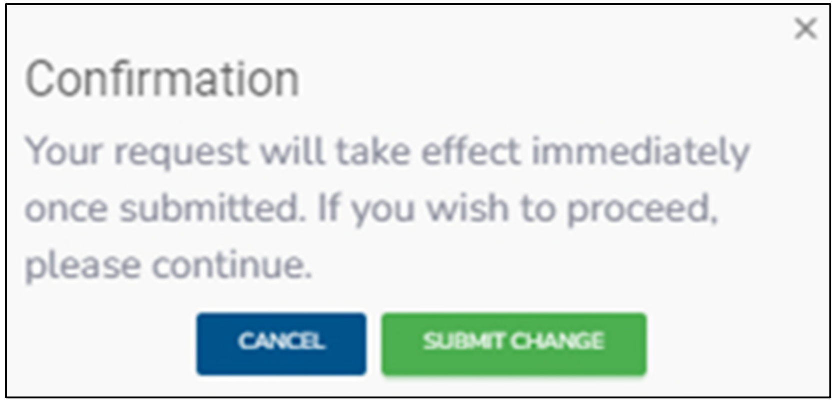


My Account

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



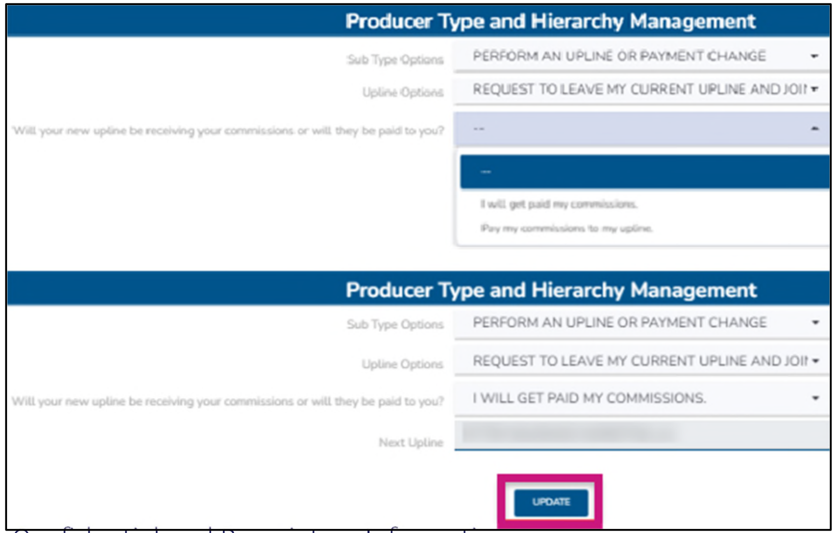


My Account

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**

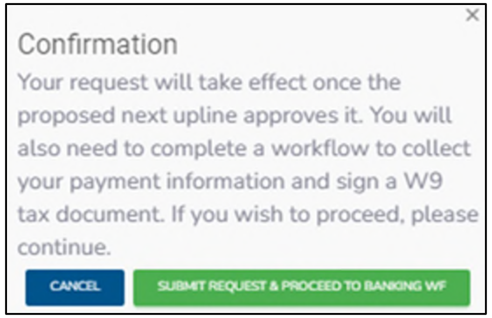
Note: If you are an LOA Field Broker, you must first request to be released from the LOA subtype. Please contact Sales Support or your upline for assistance to process these changes.



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.



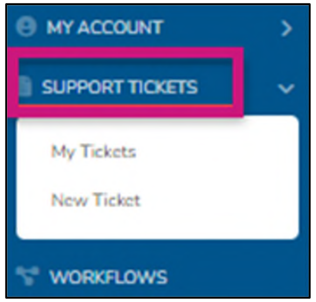
- Once the request is submitted, your current hierarchy line will update to Request Pending, and you will not be able to submit additional changes.
- To view more details about the submitted request, select **Request Pending** to be directed to Workflows. Cancel the request is an option from this window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

Support Tickets

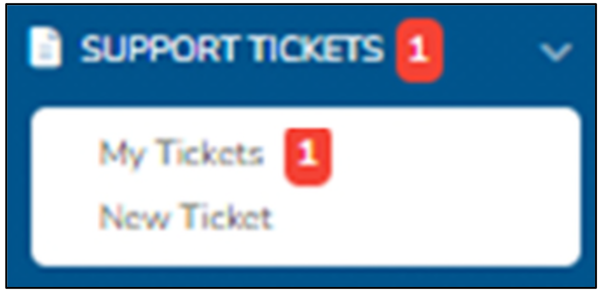
Support Tickets

My Tickets

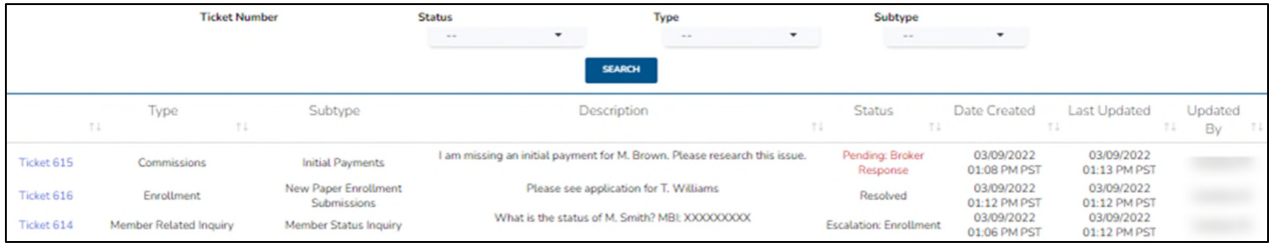
The My Tickets tab allows the tracking of the status and responses on all inquiries submitted.



- 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



Support Tickets

My Tickets – Ticket Statuses

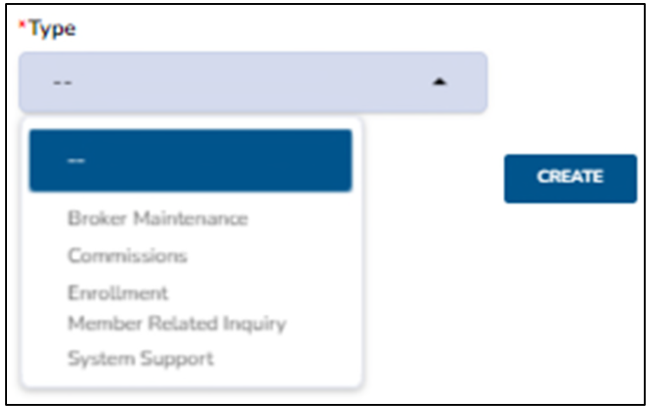
The My Tickets tab allows to track the status and responses on all inquiries submitted.

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.

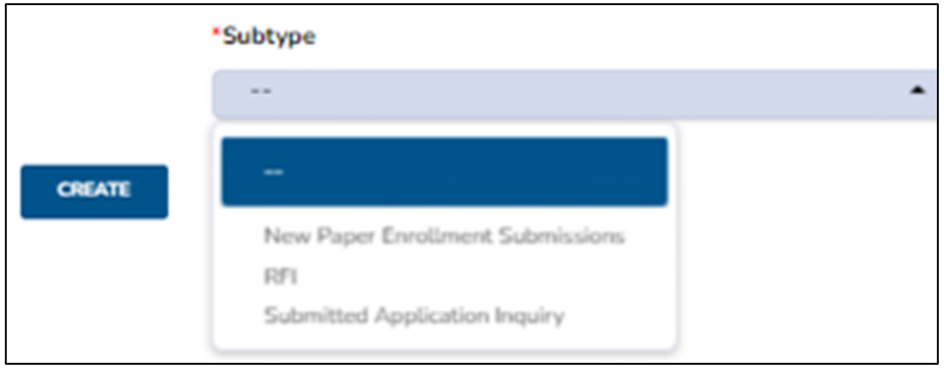
Support Tickets

New Ticket

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



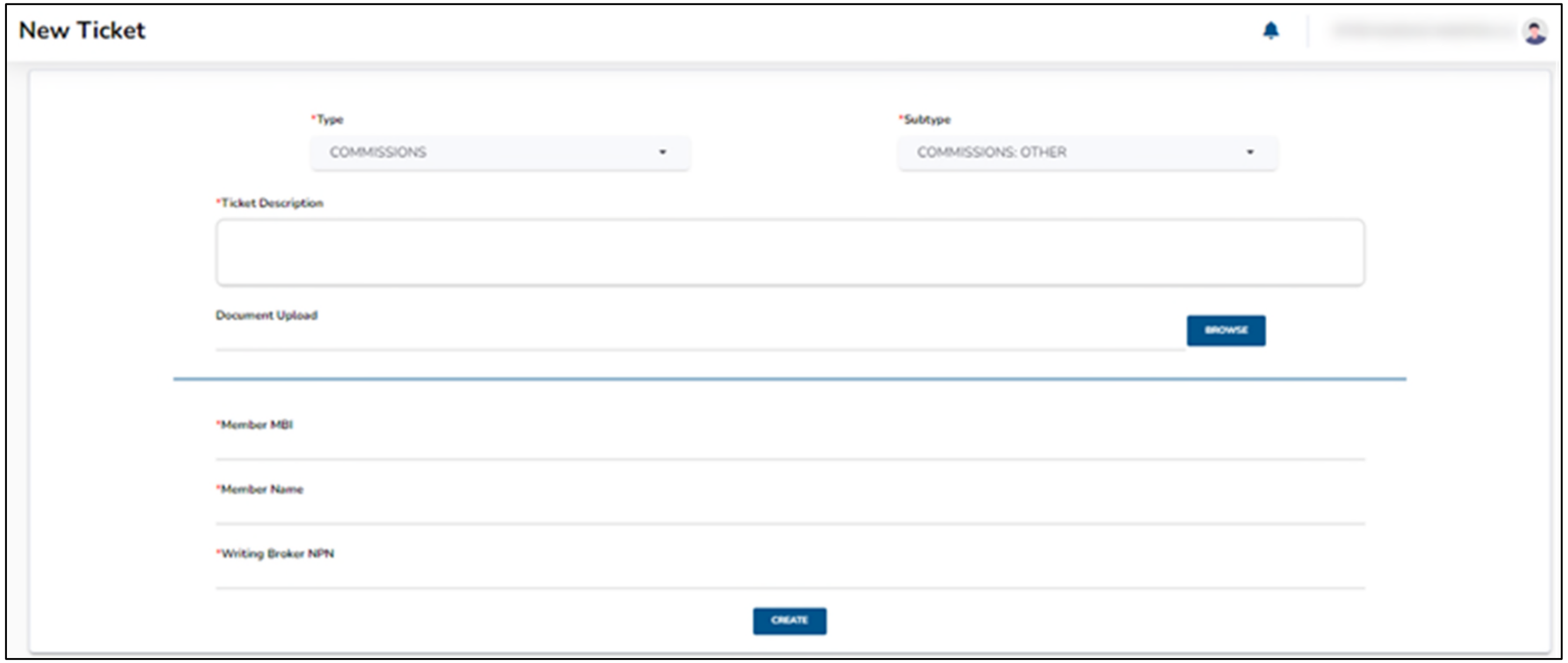
- Once the ticket type is selected, the ticket subtype can then be selected
  - This is a more specific description of your inquiry



Support Tickets

New Ticket, Cont.

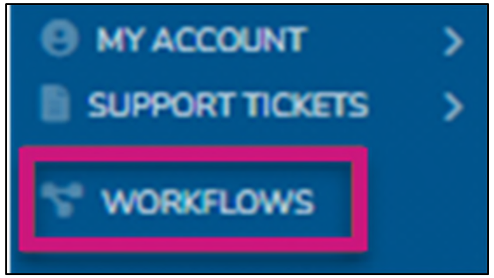
- Every ticket type requires a description
  - This is an open field to enter in details about the inquiry
- Depending on the subtype, specific data points will be required to submit the ticket
- For every inquiry, please provide as much information as possible so that Sales Support can best assist you!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

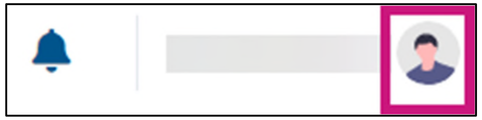
Switching Between Principal and Agency Portals

wellcare

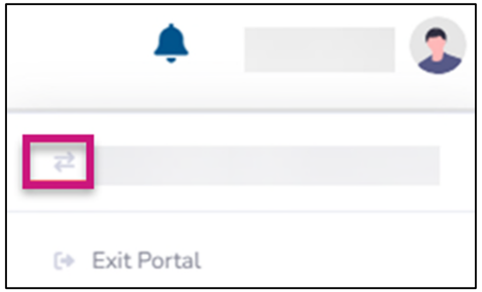
Switching Between Principal and Agency Portals

Switching from Principal Portal to Agency Portal

- Principals of agencies can switch from their principal profile to the agency profile.
- Agencies cannot switch from the agency profile to the principal profile, this is for those agencies that have more than one principal. This protects the privacy of each principal.
- When switching profiles, select the **Person** icon.



- Back and forth arrows will populate next to the agency name.



- Select the agency name to switch to their profile.
- To switch back to the principal profile, log out and login using the principal SSO credentials.

CENTENE Workbench

Questions?

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