



CENTENE
Workbench

wellcare

TM

Centene Workbench: Hierarchy Level Portal Overview

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 |

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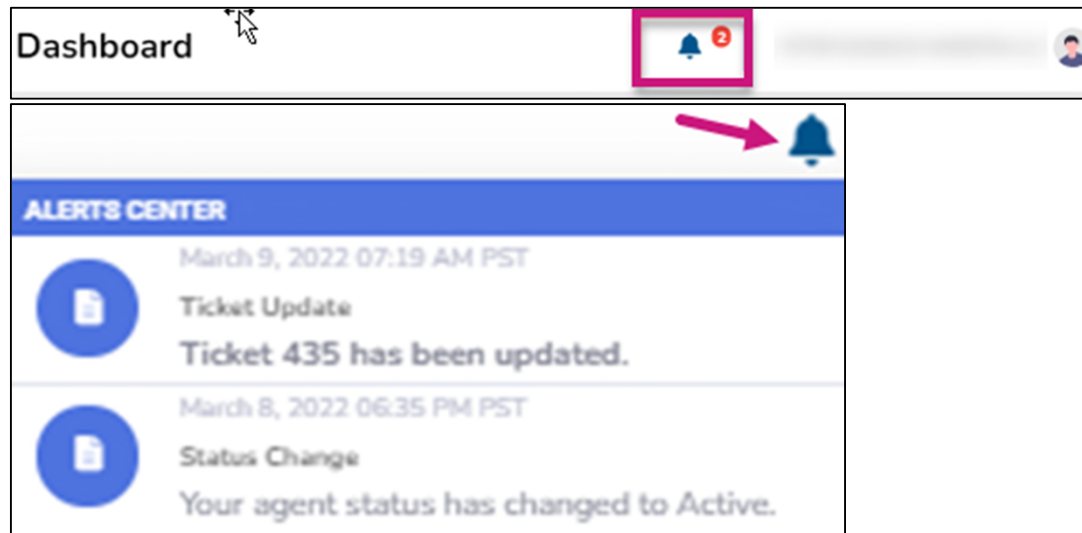
Dashboard



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](#).

| My Credentials | |
|----------------|------------------------|
| Broker Status | Active/Certified |
| State Licenses | 48 Active 2 Inactive |
| View Details | |

2. Commission Statement History

Provides a summary of recent commissions statement

| Commission Statement History | | |
|------------------------------|------------------------------|------------------|
| Statement Date | Statement Description | Total Commission |
| 01/01/2022 | 2022 Jan External commission | \$ |
| 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

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 | |



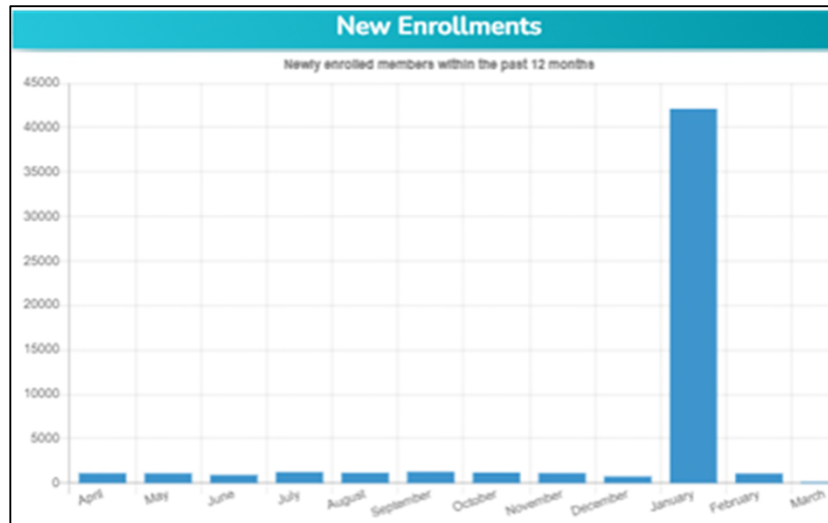
Dashboard

Widgets

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

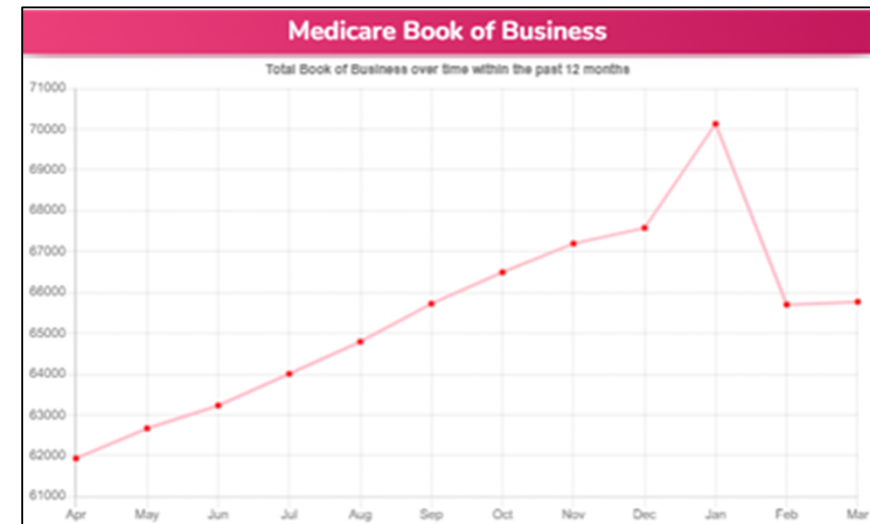
5. New Enrollments

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

| My Downline's Credentials | |
|---------------------------|---------------------------------------|
| Downline Status | 1933 Active/Certified 784 Suspended |
| Downline Licenses | 34803 Active 636 Inactive |
| View Details | |





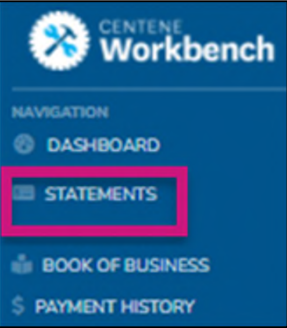
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Statements



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 | | 01/01/2022 | | | | | ACH | | |





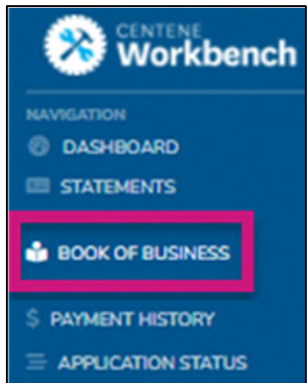
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Book of Business



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.

| | | | | |
|---|----------------------|----------------------|---------------------------------|---------------------------------|
| First Name | Last Name | Member MBI | Active Member | Broker NPN |
| <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="text" value="--"/> | <input type="text" value="--"/> |
| Effective From | Effective To | Termination From | Termination To | |
| <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> | |
| <input type="button" value="SEARCH"/> <input type="button" value="DOWNLOAD"/> | | | | |



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

| <div>SEARCHDOWNLOAD</div> <div>Search: <input type="text"/></div> | | | | | | | | | | |
|---|----------------------------|---------------------------|-----------------------|--------------------------------|----------------------------------|--------------------------|----------------------|--------------------------|----------------------------|-----------------------------|
| Member MBI ↑↓ | First Name ↑↓ | Last Name ↑↓ | Phone ↑↓ | Effective Date ↑↓ | Termination Date ↑↓ | Contract ↑↓ | Plan ↑↓ | Mem Year ↑↓ | Broker NPN ↑↓ | Broker Name ↑↓ |
| <div></div> | ALBERT | <div></div> | <div></div> | 01/01/2019 | | S4802 | 145 | 4 | <div></div> | <div></div> |
| <div></div> | HARRY | <div></div> | <div></div> | 01/01/2022 | | H5199 | 008 | 1 | <div></div> | <div></div> |





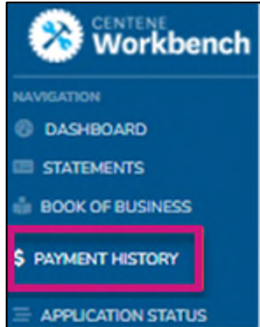
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Payment History



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

Payment History

Statment Date From: 03/01/2022 Statement Date To: 03/31/2022 Member MBI: Broker NPN: --

SEARCH

| Member MBI ↑↓ | First Name ↑↓ | Last Name ↑↓ | Broker NPN ↑↓ | Broker Name ↑↓ | Statement Date ↑↓ | Batch ID ↑↓ | Statement Number ↑↓ | Amount ↑↓ | Payment Type ↑↓ | Payment Date ↑↓ | Payment ID ↑↓ |
|---------------|---------------|--------------|---------------|----------------|-------------------|-------------|---------------------|-----------|-----------------|-----------------|---------------|
|---------------|---------------|--------------|---------------|----------------|-------------------|-------------|---------------------|-----------|-----------------|-----------------|---------------|





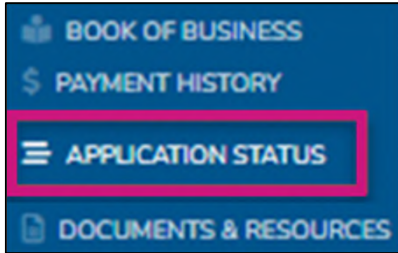
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Application Status



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

| | | | |
|---------------------------------------|----------------------|----------------------|----------------------|
| First Name | Last Name | Member MBI | Member Status |
| <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> |
| App Date From | App Date To | Broker NPN | |
| <input type="text"/> | <input type="text"/> | <input type="text"/> | |
| <input type="button" value="SEARCH"/> | | | |



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

| <div>SEARCHDOWNLOAD</div> <div>Search: <input type="text"/></div> | | | | | | | | | |
|---|------------------------------|---------------------------------|----------------------------------|------------------------------|-----------------------------|--------------------------|--------------------------|------------------------------|-------------------------------|
| App ID | Member MBI <small>↑↓</small> | App Sign Date <small>↑↓</small> | Effective Date <small>↑↓</small> | First Name <small>↑↓</small> | Last Name <small>↑↓</small> | Status <small>↑↓</small> | Reason <small>↑↓</small> | Broker NPN <small>↑↓</small> | Broker Name <small>↑↓</small> |
| | | 02/07/2022 | 03/01/2022 | DOLORES | | Enrolled-Active | | | |
| | | 02/12/2022 | 03/01/2022 | NATHANIEL | | Future Enroll | | | |





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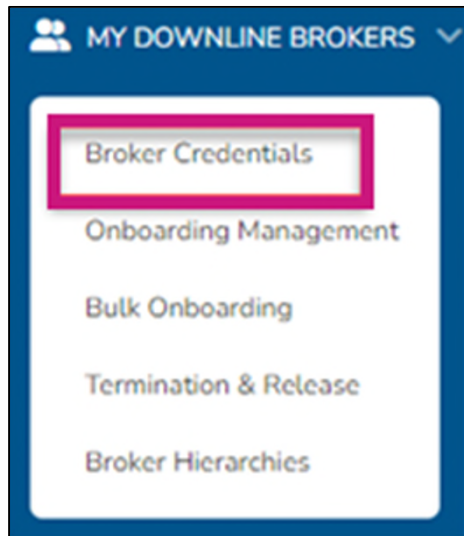
My Downline Brokers



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

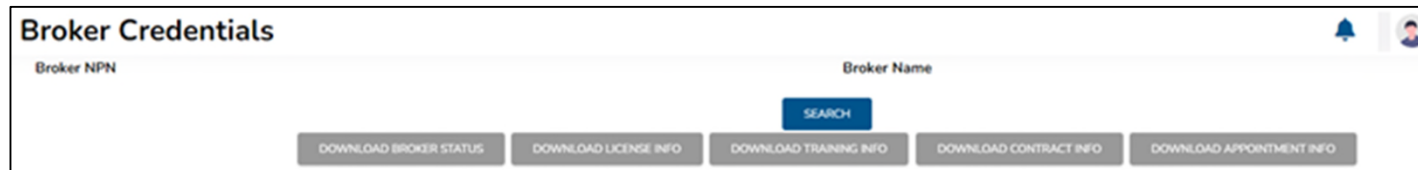
- This allows the view of what percentage of training has been completed for your downline brokers.

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.

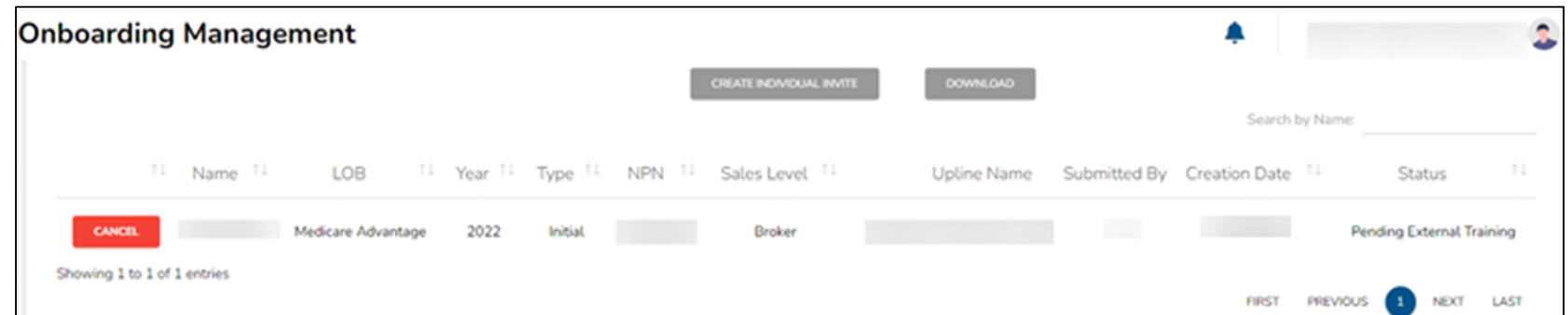
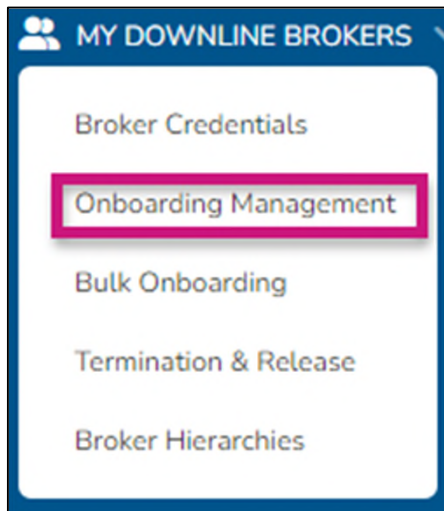


The screenshot shows a web interface titled "Broker Credentials". It features a search bar with a "Broker NPN" label on the left and a "Broker Name" label on the right. A blue "SEARCH" button is positioned below the search bar. At the bottom of the interface, there are five buttons: "DOWNLOAD BROKER STATUS", "DOWNLOAD LICENSE INFO", "DOWNLOAD TRAINING INFO", "DOWNLOAD CONTRACT INFO", and "DOWNLOAD APPOINTMENT INFO". In the top right corner of the interface, there is a bell icon and a user profile icon.

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.



Onboarding Management

CREATE INDIVIDUAL INVITE DOWNLOAD

Search by Name: _____

| Name | LOB | Year | Type | NPN | Sales Level | Upline Name | Submitted By | Creation Date | Status |
|------------------------|--------------------|------|---------|-----|-------------|-------------|--------------|---------------|---------------------------|
| CANCEL | Medicare Advantage | 2022 | Initial | | Broker | | | | Pending External Training |

Showing 1 to 1 of 1 entries

FIRST PREVIOUS 1 NEXT LAST

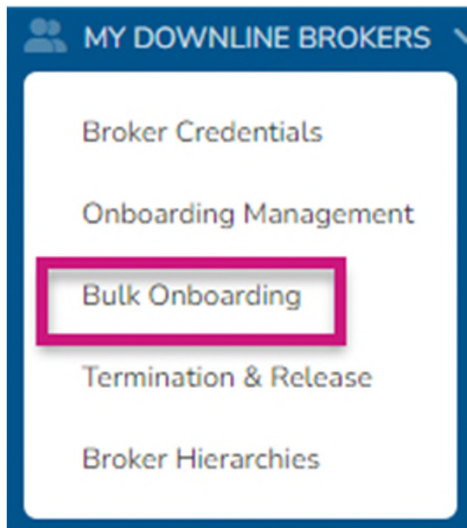
- Download the list of brokers or agencies into a CSV file
- Please refer to the How to Send Invites Guide for information on how to create individual invites



My Downline Brokers

Bulk Onboarding

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



| Bulk Onboarding | | | | | | | | |
|-----------------|--|-----------------------|--------|-----------------|------------|-----------|------------------------|--|
| | | | | | | | | |
| 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.

The image shows a sidebar on the left titled 'MY DOWNLINE BROKERS' with a dropdown arrow. It contains five menu items: 'Broker Credentials', 'Onboarding Management', 'Bulk Onboarding', 'Termination & Release' (highlighted with a red box), and 'Broker Hierarchies'. To the right, there are two panels. The top panel is titled 'Termination & Release' and has two buttons: 'TERMINATE TELE BROKER' and 'RELEASE BROKER'. Below these buttons is a table with columns: Action, Name, NPN, and Execution Date. The table contains five rows of data. The bottom panel is titled 'Release Producers' and has columns: Broker ID, Broker Name, NPN, Agent Type, and Release Eligibility. The 'Release Eligibility' column for the first row is highlighted with a red box and contains the text 'Invalid Producer Type'.

| Action | Name | NPN | Execution Date |
|-------------------------------|------|-----|------------------------|
| Broker Released From Downline | | | 02/21/2022 4:09 PM PST |
| Tele Termination | | | 02/21/2022 3:27 PM PST |
| Broker Released From Downline | | | 02/21/2022 3:23 PM PST |
| Tele Termination | | | 02/17/2022 3:06 PM PST |
| Broker Release From Downline | | | 02/17/2022 3:04 PM PST |

| Broker ID | Broker Name | NPN | Agent Type | Release Eligibility |
|-----------|-------------|-----|------------|-----------------------|
| | | | | Invalid Producer Type |

- 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.

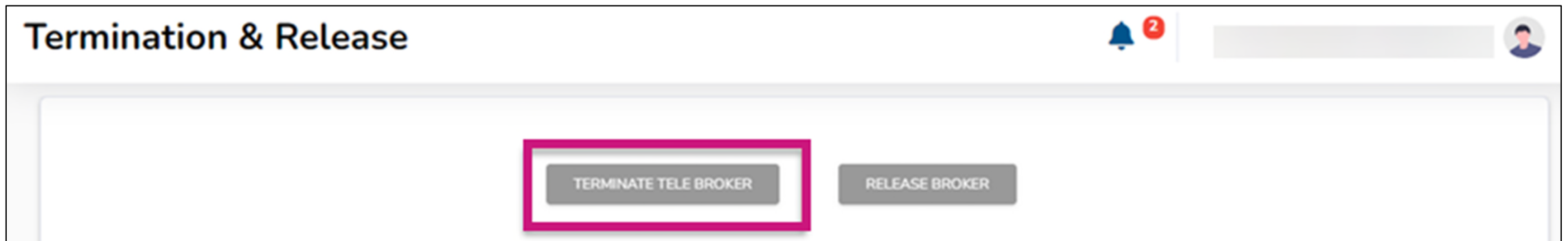


My Downline Brokers

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



Terminate Tele Brokers

You are able to terminate producers that fulfill the following criteria:
1. The producer reports to you directly, meaning they have you as their next upline producer.
2. They are of type Telesales Broker, Teledigital Broker, or Telesupport Broker.
Once a producer is terminated, they will no longer be part of your active downline

Please enter in the NPN's below in this format:
ExampleNPN1
ExampleNPN2
ExampleNPN3

VALIDATE

Terminate Tele Brokers

| Broker ID | Broker Name | NPN | Agent Type | Termination Eligibility |
|-----------|---------------|------------|------------|-------------------------|
| 0001 | John Doe | 0000000000 | Telesales | Yes |
| 0002 | Jane Smith | 0000000000 | Telesales | Yes |
| 0003 | Mike Johnson | 0000000000 | Telesales | Yes |
| 0004 | Sarah Brown | 0000000000 | Telesales | Yes |
| 0005 | David Wilson | 0000000000 | Telesales | Yes |
| 0006 | Emily Davis | 0000000000 | Telesales | Yes |
| 0007 | Chris Miller | 0000000000 | Telesales | Yes |
| 0008 | Alexander Lee | 0000000000 | Telesales | Yes |
| 0009 | Olivia White | 0000000000 | Telesales | Yes |
| 0010 | Noah Black | 0000000000 | Telesales | Yes |

Showing 1 to 10 of 30 entries

TERMINATE

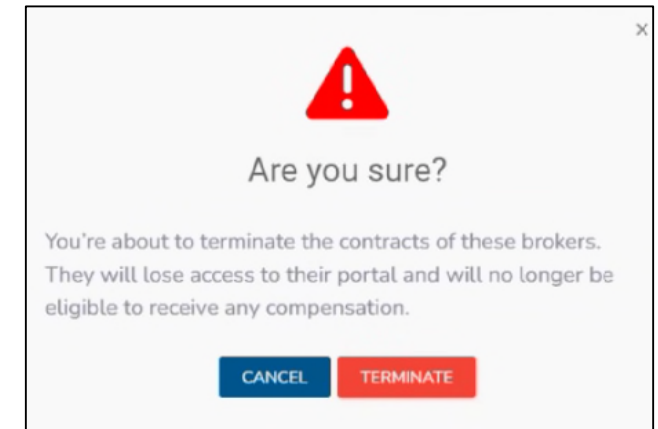
FIRST PREVIOUS 1 2 3 NEXT LAST



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



| Broker ID | Broker Name | APN | Agent Type | Termination Eligibility |
|-----------|-------------|-------|------------|-------------------------|
| 1001 | ABC BROKER | 12345 | TELE | YES |
| 1002 | DEF BROKER | 67890 | TELE | YES |
| 1003 | GHI BROKER | 11111 | TELE | YES |
| 1004 | JKL BROKER | 22222 | TELE | YES |
| 1005 | MNO BROKER | 33333 | TELE | YES |
| 1006 | PQR BROKER | 44444 | TELE | YES |
| 1007 | STU BROKER | 55555 | TELE | YES |
| 1008 | VWX BROKER | 66666 | TELE | YES |
| 1009 | YZA BROKER | 77777 | TELE | YES |
| 1010 | BCD BROKER | 88888 | TELE | YES |



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

| Terminate Tele Brokers | | | | |
|------------------------|-------------|-----|------------|--|
| Broker ID | Broker Name | NPN | Agent Type | Termination Eligibility |
| | | | | Broker must be your immediate downline |

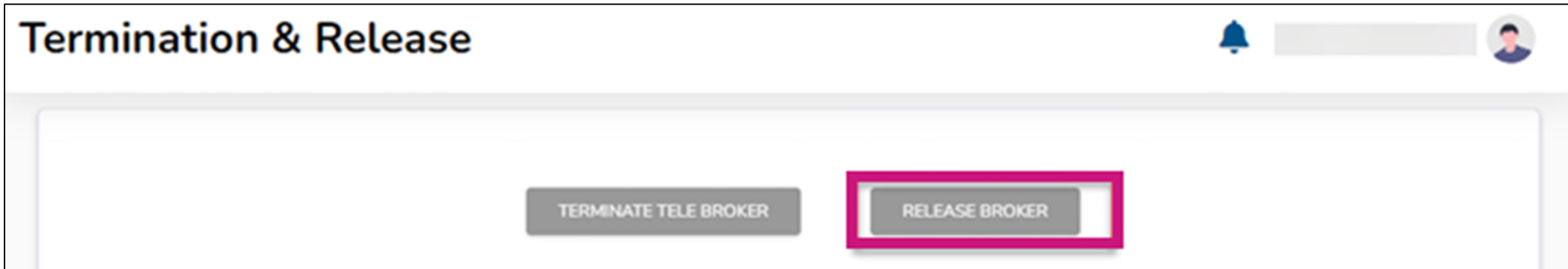


My Downline Brokers

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

RELEASE BROKER

Release Producers

You are able to release producers from your downline that fulfill the following criteria:

1. The producer reports to you directly, meaning they have you as their next upline producer.

2. They are of type Field Broker, Captive Broker, or Agency.

Once a producer is released, they will become a direct to Wellcare producer with no next upline.

Please enter in the NPNs below in this format:
ExampleNPN1
ExampleNPN2
ExampleNPN3

VALIDATE

Release Producers

| Broker ID | Broker Name | NPN | Agent Type | Release Eligibility |
|-----------|-------------|-----|------------|--|
| | | | Broker | Eligible |
| | | | Broker | Broker must be your immediate downline |
| | | | Broker | Eligible |
| | | | Broker | Eligible |
| | | | Broker | Eligible |
| | | | Broker | Eligible |
| | | | Broker | Eligible |
| | | | Broker | Broker must be your immediate downline |
| | | | Broker | Eligible |

Showing 1 to 10 of 10 entries

RELEASE

PAGE 1 OF 1



My Downline Brokers

Release Brokers, Cont.

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

RELEASE

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

TERMINATE TELE BROKER

RELEASE BROKER

Search:

| Action | Name | NPN | Execution Date |
|-------------------------------|------|-----|------------------------|
| Broker Released From Downline | | | 03/11/2022 9:58 AM PST |
| Broker Released From Downline | | | 03/11/2022 9:57 AM PST |
| Broker Released From Downline | | | 03/11/2022 9:57 AM PST |
| Broker Released From Downline | | | 03/11/2022 9:57 AM PST |
| Broker Released From Downline | | | 03/11/2022 9:57 AM PST |
| Broker Released From Downline | | | 03/11/2022 9:57 AM PST |
| Broker Released From Downline | | | 03/11/2022 9:57 AM PST |
| Broker Released From Downline | | | 03/11/2022 9:57 AM PST |
| Broker Released From Downline | | | 02/21/2022 4:09 PM PST |
| Tele Termination | | | 02/21/2022 3:27 PM PST |

Showing 1 to 10 of 34 entries

FIRST

PREVIOUS

1

2

3

4

NEXT

LAST

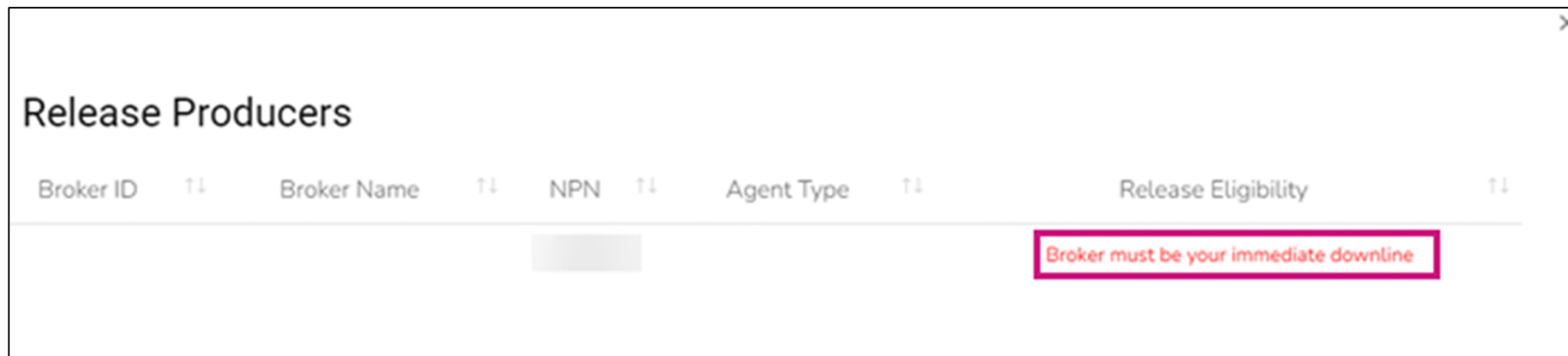


My Downline Brokers

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



The screenshot shows a web interface titled "Release Producers" with a table. The table has five columns: "Broker ID", "Broker Name", "NPN", "Agent Type", and "Release Eligibility". Each column header has a small upward and downward arrow icon. The "Release Eligibility" column contains a red error message: "Broker must be your immediate downline". The message is enclosed in a red rectangular border. The table is otherwise empty.

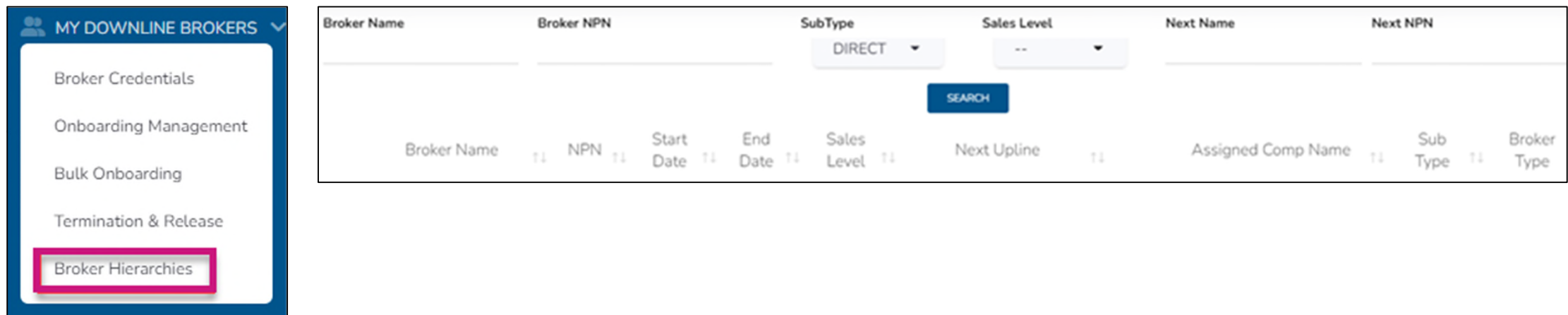
| Broker ID | Broker Name | NPN | Agent Type | Release Eligibility |
|-----------|-------------|-----|------------|--|
| | | | | Broker must be your immediate downline |



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.



The image shows a sidebar on the left with the title 'MY DOWNLINE BROKERS' and a dropdown arrow. Below the title are five menu items: 'Broker Credentials', 'Onboarding Management', 'Bulk Onboarding', 'Termination & Release', and 'Broker Hierarchies'. The 'Broker Hierarchies' item is highlighted with a red rectangular box. To the right of the sidebar is a search interface for 'Broker Hierarchies'. It features a table with columns: 'Broker Name', 'Broker NPN', 'SubType', 'Sales Level', 'Next Name', and 'Next NPN'. The 'SubType' column has a dropdown menu currently set to 'DIRECT'. The 'Sales Level' column has a dropdown menu currently set to '--'. Below these dropdowns is a blue 'SEARCH' button. Below the search filters is a table with columns: 'Broker Name', 'NPN', 'Start Date', 'End Date', 'Sales Level', 'Next Upline', 'Assigned Comp Name', 'Sub Type', and 'Broker Type'. Each column has a small upward and downward arrow icon next to it, indicating that the columns are sortable.

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





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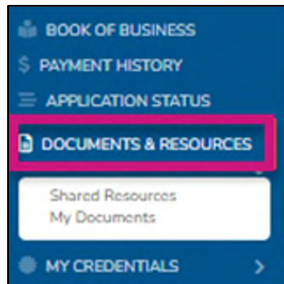
Documents & Resources



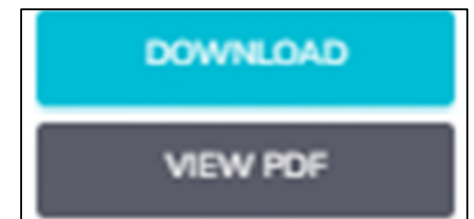
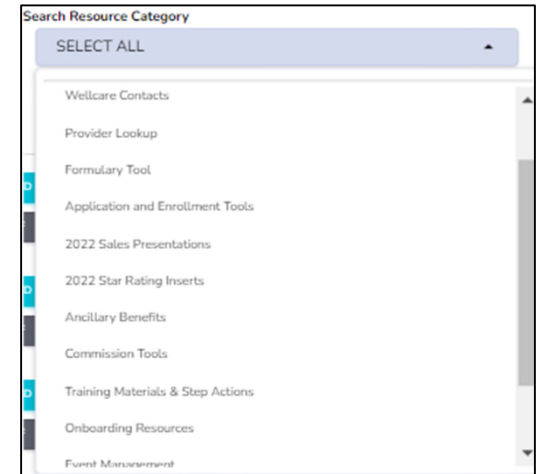
Document Resources

Shared Resources

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



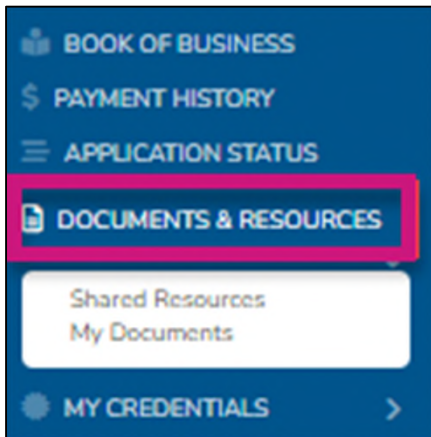
- Use the **Search Resource Category** option to look for specific document topics
- Use the open text Search field as an alternative
- If the resource is a PDF, view the document within the portal, or download it.



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.





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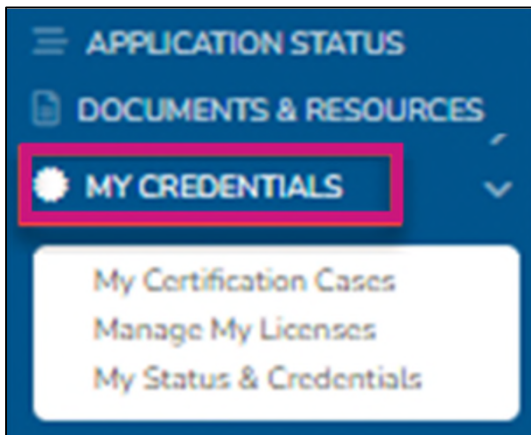
My Credentials



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

The licenses shown in the "Active States" section below reflect states you are currently approved to market/ sell Wellcare Medicare Advantage and/ or Prescription Drug Plans. If you would like to activate any additional state licenses, please select from the options listed in the "Available States" section. After you are finished selecting state(s), make sure to click on "Add Selected State" to save your changes.

| Active States | Available States |
|--|--|
| <input checked="" type="checkbox"/> LA - Louisiana | <input type="checkbox"/> AR - Arkansas |
| <input checked="" type="checkbox"/> MO - Missouri | <input type="checkbox"/> TX - Texas |
| <input checked="" type="checkbox"/> MS - Mississippi | |

ADD SELECTED STATES



My Credentials

My Status & Credentials

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

| My Status & Credentials | | | | |
|-------------------------|---|-----------------|---|-----------------|
| MY STATUS | | | | |
| LICENSE INFO | | | | |
| TRAINING INFO | | | | |
| CONTRACT INFO | | | | |
| APPOINTMENT INFO | | | | |
| Search: | | | | |
| Active Resident License | T | Active Contract | T | Active Training |
| Yes | | Yes | | Yes |
| Broker Status | | | | T |
| Active/Certified | | | | |

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

| My Status & Credentials | | | | | | | | | |
|-----------------------------|---|----------|---|----------------|---|------------------------|---|-------------------------------|------|
| MY STATUS | | | | | | | | | |
| LICENSE INFO | | | | | | | | | |
| TRAINING INFO | | | | | | | | | |
| CONTRACT INFO | | | | | | | | | |
| APPOINTMENT INFO | | | | | | | | | |
| Search: | | | | | | | | | |
| State | T | Resident | T | License Number | T | License Class Name | T | LOA Name | T |
| NI | | Yes | | | | Insurance Producer | | Accident & Health or Sickness | |
| PA | | No | | | | NON RES PRODUCER INDIV | | Accident & Health | |
| Showing 1 to 2 of 2 entries | | | | | | | | PREVIOUS | NEXT |

- 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.

My Status & Credentials

MY STATUS

LICENSE INFO

TRAINING INFO

CONTRACT INFO

APPOINTMENT INFO

Search:

| Training Year | Training Name | Start Date | End Date | Training Progress |
|---------------|---|------------|------------|-------------------|
| 2022 | 2022 Wellcare ACT Journey to a Successful Season - Broker | 09/26/2021 | 09/30/2022 | 100.00 |

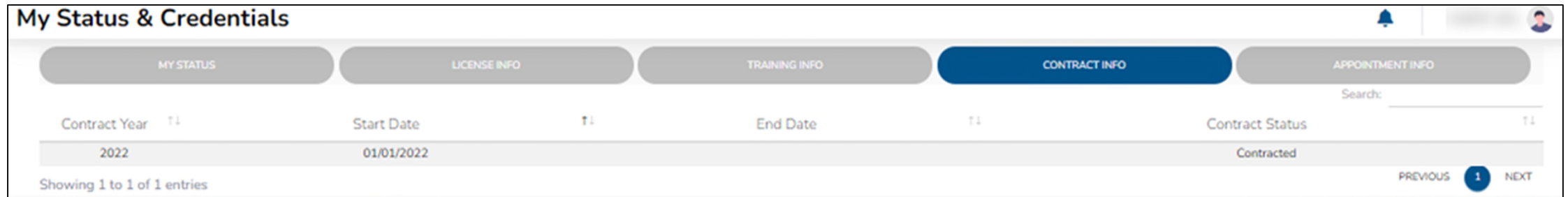
- Every year track progress through the Training Progress column.
- Training Progress Percent Breakdown:
 - 25% = AHIP Only Completed
 - 50% = AHIP + ACT Journey Completed
 - 75% = AHIP + ACT Journey & Product Completed
 - 100% = AHIP + ACT Journey & Product + ACT Exam (Passed)



My Credentials

My Status & Credentials, Cont.

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



My Status & Credentials

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

Search: _____

| Contract Year | Start Date | End Date | Contract Status |
|---------------|------------|----------|-----------------|
| 2022 | 01/01/2022 | | Contracted |

Showing 1 to 1 of 1 entries

PREVIOUS 1 NEXT

- 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

Start Date

End Date

Entity ID

Company Name

Company Product

State

Appointment Status

10/08/2020

MA - Comm

PA

Appointed

09/27/2021

CCP

PA

Appointed

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





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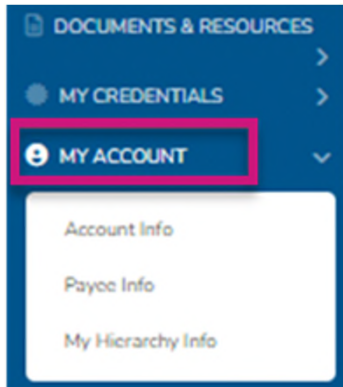
My Account



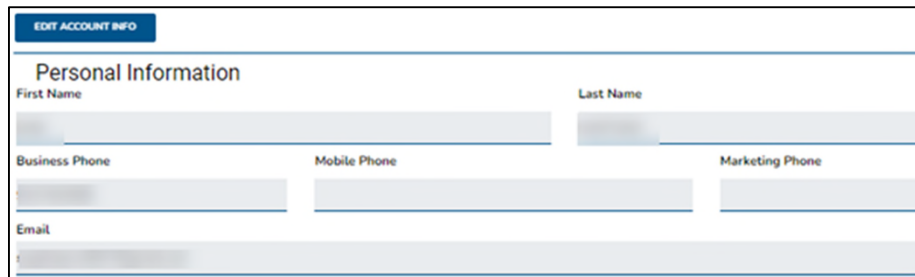
My Account

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

A screenshot of a web form titled 'EDIT ACCOUNT INFO'. The form is divided into sections. The first section is 'Personal Information' and contains two input fields: 'First Name' and 'Last Name'. Below this, there are three input fields for phone numbers: 'Business Phone', 'Mobile Phone', and 'Marketing Phone'. At the bottom of the form, there is an 'Email' input field. All input fields are currently empty.

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

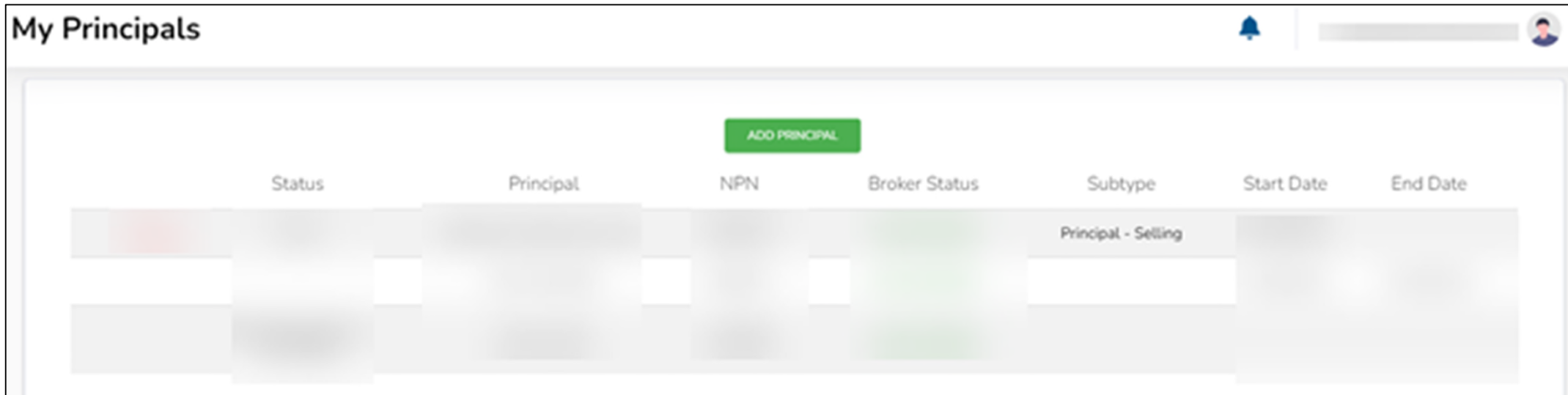


My Account

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



The screenshot displays the 'My Principals' interface. At the top left is the title 'My Principals'. To its right are a blue bell icon and a user profile icon. Below these is a green button labeled 'ADD PRINCIPAL'. The main area contains a table with the following headers: Status, Principal, NPN, Broker Status, Subtype, Start Date, and End Date. The table has two rows of data, which are blurred. The first row shows a red status indicator, a principal name, an NPN number, a green broker status indicator, and the subtype 'Principal - Selling'. The second row shows a grey status indicator, a principal name, an NPN number, a green broker status indicator, and the subtype 'Principal - Selling'.

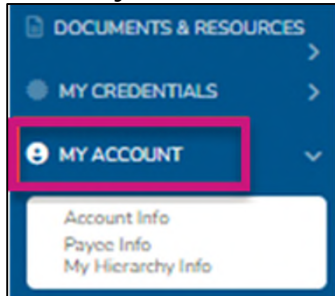
| Status | Principal | NPN | Broker Status | Subtype | Start Date | End Date |
|--------|-----------|-----|---------------|---------------------|------------|----------|
| | | | | Principal - Selling | | |
| | | | | Principal - Selling | | |



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.

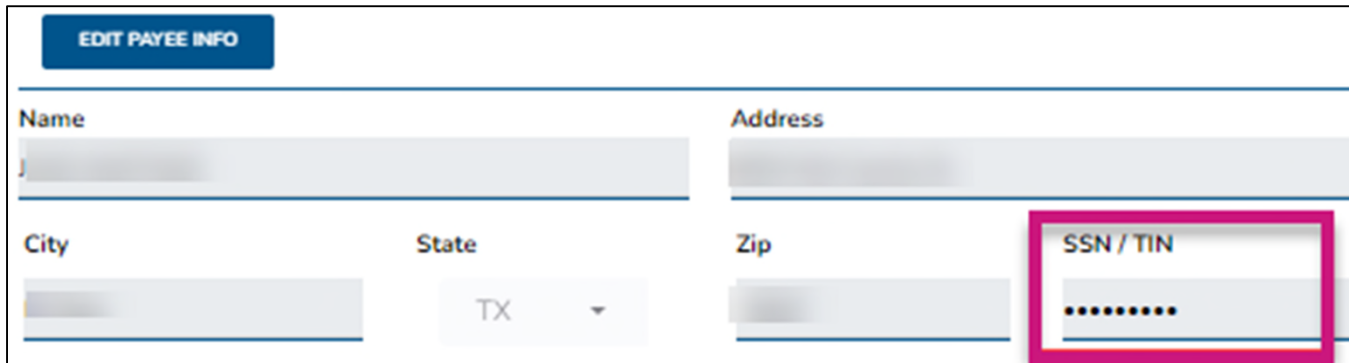
A screenshot of a web form titled 'EDIT PAYEE INFO'. The form has two main sections. The first section has two input fields: 'Name' and 'Address'. The 'Name' field contains the letter 'J'. The second section has four input fields: 'City', 'State', 'Zip', and 'SSN / TIN'. The 'State' field is a dropdown menu showing 'TX'. The 'SSN / TIN' field contains a series of dots. The form is enclosed in a blue border.

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



EDIT PAYEE INFO

Name

Address

City

State

TX

Zip

SSN / TIN

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

PAYMENT INFORMATION

W9 FORM

Payee

You are eligible to declare a private company, that you legally represent or own, to be your payee. This means that any money earned is paid to the Tax ID of this company. It also means that the 1099 tax form issued to you will be in the name and Tax ID of this company. If you chose to declare a payee, you will be prompted to sign a W9 form for your declared company payee. If you chose to not declare a company as your payee, then you will be the payee on record. This means that the 1099 tax form issued to you will be in your name and SSN. You will be prompted to sign a W9 form with your information.

Do you want to declare a private company to be your payee? *

As you declared "yes", you will need to provide additional information regarding your payee in the section below. The information you enter below will be used to electronically generate a IRS W-9 Form.

Business Entity Information

| | |
|----------------------|---------|
| Taxpayer ID Number * | |
| Business Name DBA * | |
| Business Address * | |
| Business City * | El Paso |
| Business State * | Texas |
| Business Zip * | 79907 |



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**

The screenshot displays a web form titled 'PAYMENT INFORMATION' with a 'W9 FORM' tab. The 'W-9 Information' section includes a 'Taxation Type' dropdown menu, a checkbox for legal authorization, and a declaration statement. The 'Banking Information' section contains fields for 'Payment Method' (set to ACH), 'Account Type' (set to Checking), 'Account Number' (masked with dots), 'Verify Account Number' (masked with dots), 'Routing Number' (masked with dots), and 'Financial Institution'. At the bottom, there are 'ABORT' and 'CONTINUE' buttons.

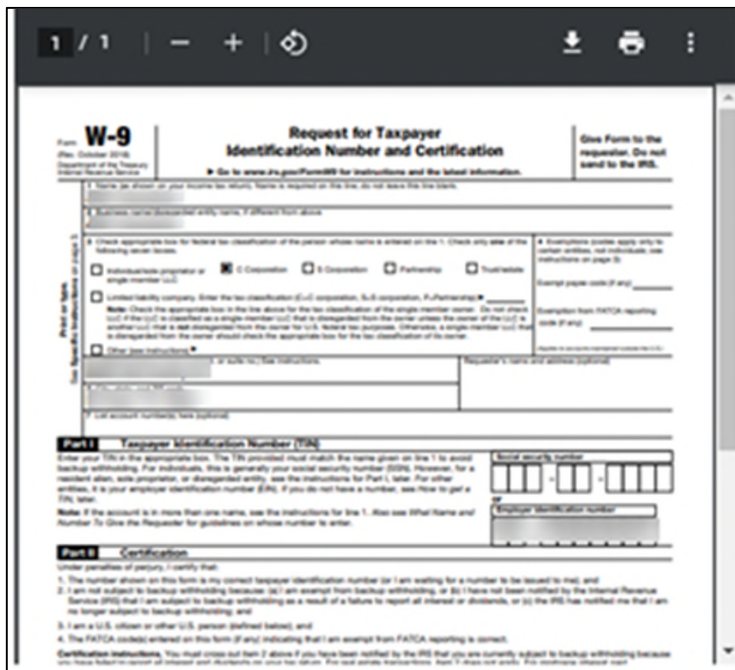
| PAYMENT INFORMATION | | W9 FORM |
|----------------------------|---|-----------------|
| W-9 Information | | |
| Taxation Type * | -- | |
| <input type="checkbox"/> | I declare that I am legally authorized to execute contracts and agreements on behalf of myself or the legal entity I represent. * | |
| Banking Information | | |
| Payment Method | ACH (Direct Deposit) | |
| Account Type * | Checking | |
| [?] Account Number: * | | 👁 |
| Verify Account Number * | | 👁 |
| [?] Routing Number: * | | |
| Financial Institution * | | |
| ABORT | | CONTINUE |



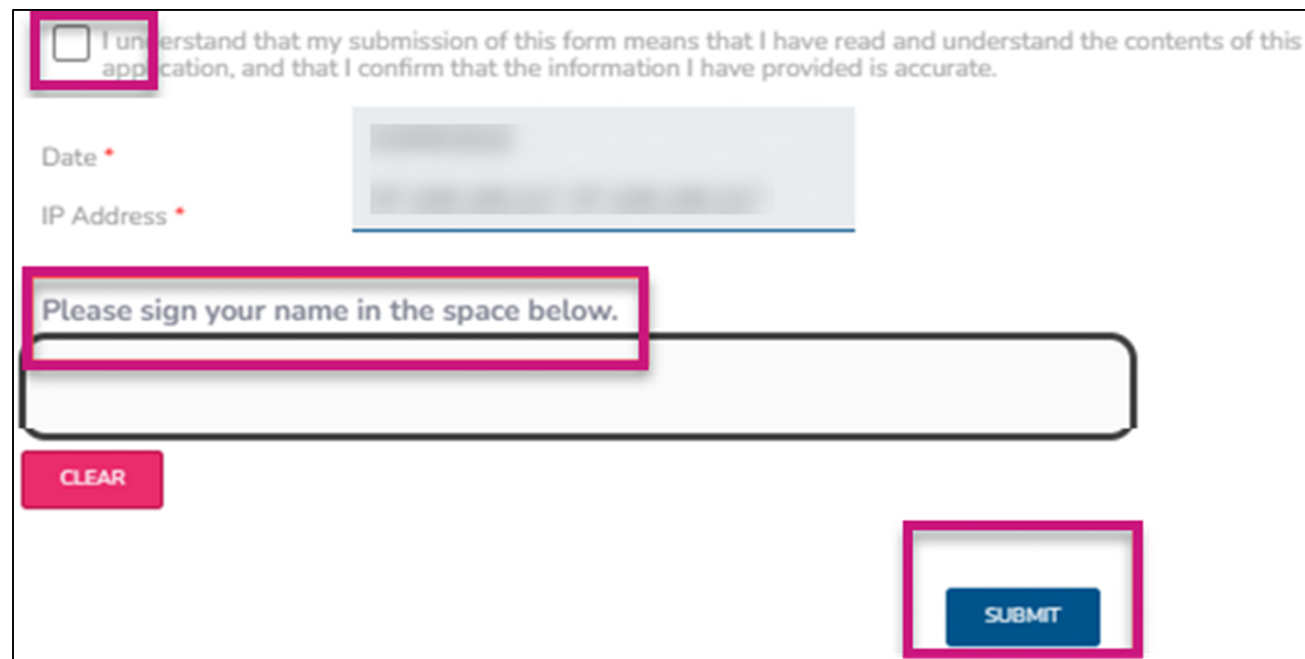
My Account

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



Form W-9: Request for Taxpayer Identification Number and Certification. The form is titled "W-9" and "Request for Taxpayer Identification Number and Certification". It includes instructions for the taxpayer to provide their name, address, and tax identification number. The form is divided into two main sections: "Part I: Taxpayer Identification Number (TIN)" and "Part II: Certification".



Digital signature and submission form. It includes a checkbox for "I understand that my submission of this form means that I have read and understand the contents of this application, and that I confirm that the information I have provided is accurate." Below this is a "Date" field and an "IP Address" field. A large text box is labeled "Please sign your name in the space below." Below the text box is a "CLEAR" button. At the bottom right is a "SUBMIT" button.



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.

EDIT BANKING INFO

Banking Method
ACH

Account Number
.....

Verify Account Number
.....

Routing Number
.....

Financial Institution
Bank of America

Account Type
CHECKING

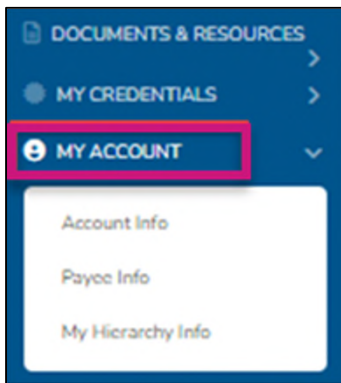
☒ Hide Information



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 Hierarchy Info | | | | | | | | | | |
|-------------------|--------|-----|------------|----------|-------------|-------------|--------------------|---------------|--------------|--|
| | Broker | NPN | Start Date | End Date | Sales Level | Upline Name | Assigned Comp Name | Sub Type | Broker Type | |
| CHANGE | | | 10/02/2021 | | 01 - Broker | | | Downline Only | Field Broker | |



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

Producer Type and Hierarchy Management

Sub-Type Options: NOTHING SELECTED

Perform an Upline or Payment Change

Producer Type and Hierarchy Management

Sub-Type Options: PERFORM AN UPLINE OR PAYMENT CHANGE

Upline Options: NOTHING SELECTED

- Request to have my commissions paid to my next upline instead of paying to me.
- Request to leave my current upline and join new one.
- Leave my current upline and become direct to Wellcare.
- Request to have my commissions paid to me instead of to my next upline



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

Producer Type and Hierarchy Management

Sub Type Options: PERFORM AN UPLINE OR PAYMENT CHANGE

Upline Options: NOTHING SELECTED

Request to have my commissions paid to me instead of paying to next upline.
Request to leave my current upline and join new one.
Leave my current upline and become direct to Wellcare.

Confirmation

Your request will take effect immediately once submitted. If you wish to proceed, please continue.

CANCEL SUBMIT CHANGE



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.

The image shows two screenshots of a web form titled "Producer Type and Hierarchy Management". The top screenshot shows the form with the "Sub Type Options" dropdown set to "PERFORM AN UPLINE OR PAYMENT CHANGE" and the "Upline Options" dropdown set to "REQUEST TO LEAVE MY CURRENT UPLINE AND JOIN". The "Will your new upline be receiving your commissions or will they be paid to you?" dropdown is set to "--". The bottom screenshot shows the same form with the "Will your new upline be receiving your commissions or will they be paid to you?" dropdown set to "I WILL GET PAID MY COMMISSIONS.". The "Next Upline" field is empty, and the "UPDATE" button is highlighted with a red rectangle.

| Producer Type and Hierarchy Management | |
|---|---|
| Sub Type Options | PERFORM AN UPLINE OR PAYMENT CHANGE |
| Upline Options | REQUEST TO LEAVE MY CURRENT UPLINE AND JOIN |
| Will your new upline be receiving your commissions or will they be paid to you? | -- |
| I will get paid my commissions. They pay my commissions to my upline. | |

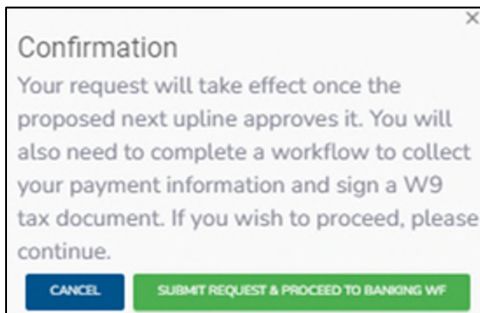
| Producer Type and Hierarchy Management | |
|---|---|
| Sub Type Options | PERFORM AN UPLINE OR PAYMENT CHANGE |
| Upline Options | REQUEST TO LEAVE MY CURRENT UPLINE AND JOIN |
| Will your new upline be receiving your commissions or will they be paid to you? | I WILL GET PAID MY COMMISSIONS. |
| Next Upline | |
| UPDATE | |



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 |





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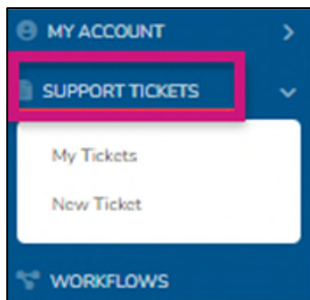
Support Tickets



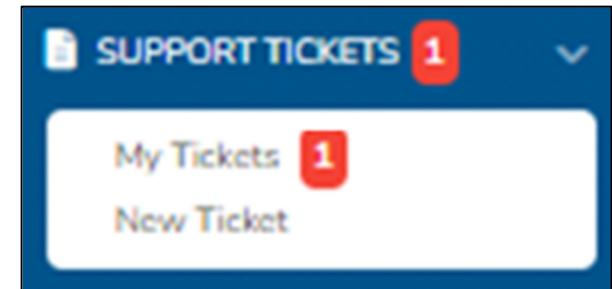
Support Tickets

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



| Ticket Number | | Status | Type | Subtype | | | |
|---------------|------------------------|----------------------------------|---|--------------------------|-------------------------|-------------------------|--|
| | | -- | -- | -- | | | |
| | | SEARCH | | | | | |
| 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 | |
| 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 | |
| Ticket 614 | Member Related Inquiry | Member Status Inquiry | What is the status of M. Smith? MBI: XXXXXXXXXX | Escalation: Enrollment | 03/09/2022 01:06 PM PST | 03/09/2022 01:12 PM PST | |



Support Tickets

My Tickets – Ticket Statuses

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

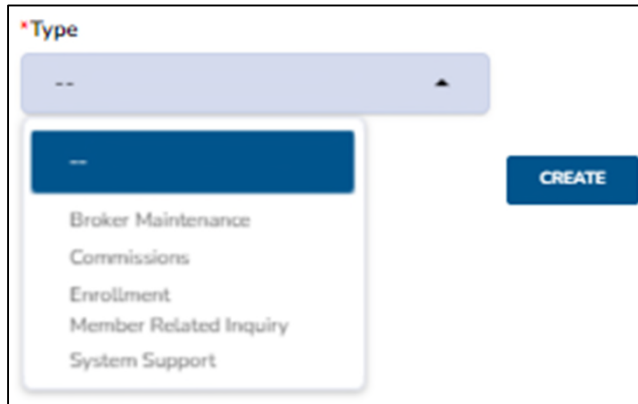
| Status | Status Meaning |
|-------------------------------|---|
| Resolved | Your inquiry has been worked and is resolved. The ticket is closed. |
| Pending Resolver | Your inquiry has been submitted and is in the queue to be assigned to a Sales Support rep. |
| Pending Broker Response | Sales Support 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

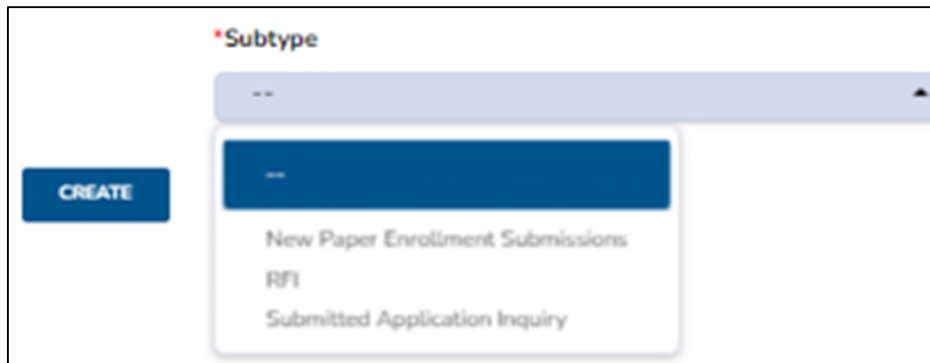
New Ticket

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



A screenshot of a web form titled '*Type'. It features a dropdown menu with a blue header bar containing three dashes. The dropdown is open, showing a list of options: 'Broker Maintenance', 'Commissions', 'Enrollment', 'Member Related Inquiry', and 'System Support'. To the right of the dropdown is a blue button labeled 'CREATE'.

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



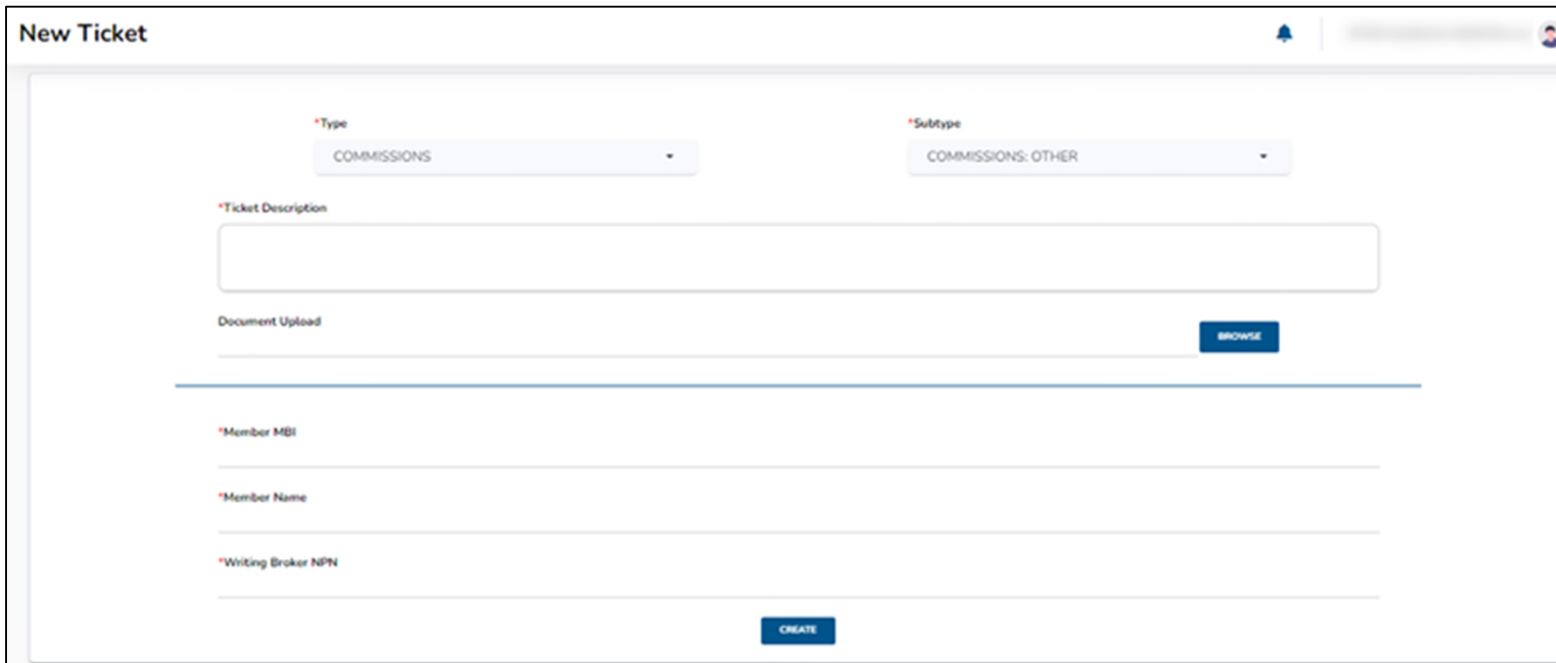
A screenshot of a web form titled '*Subtype'. It features a dropdown menu with a blue header bar containing three dashes. The dropdown is open, showing a list of options: 'New Paper Enrollment Submissions', 'RFI', and 'Submitted Application Inquiry'. To the left of the dropdown is a blue button labeled 'CREATE'.



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



The screenshot shows a web form titled "New Ticket". At the top right, there is a notification bell icon and a user profile icon. The form contains the following fields and controls:

- *Type**: A dropdown menu with "COMMISSIONS" selected.
- *Subtype**: A dropdown menu with "COMMISSIONS: OTHER" selected.
- *Ticket Description**: A large text input field.
- Document Upload**: A section with a horizontal line and a "BROWSE" button on the right.
- *Member MBI**: A text input field.
- *Member Name**: A text input field.
- *Writing Broker NPN**: A text input field.
- CREATE**: A blue button at the bottom center of the form.





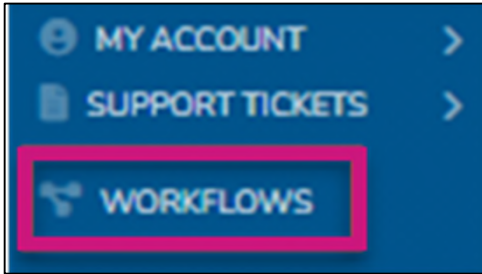
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Workflows



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

| Type | ↑↓ | Status | ↑↓ | Requestor | ↑↓ | Approver | ↑↓ | Last Updated |
|------|----|--------|----|-----------|----|----------|----|--------------|
|------|----|--------|----|-----------|----|----------|----|--------------|

Status

--

Type

--

SEARCH





CENTENE
Workbench

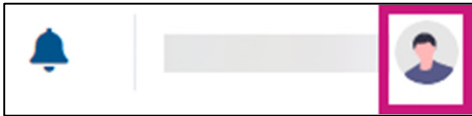
Switching Between Principal and Agency Portals



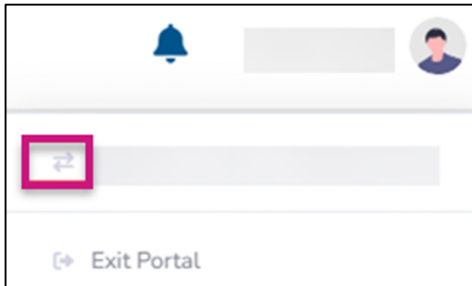
Switching Between Principal and Agency Portals

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.





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Questions?

