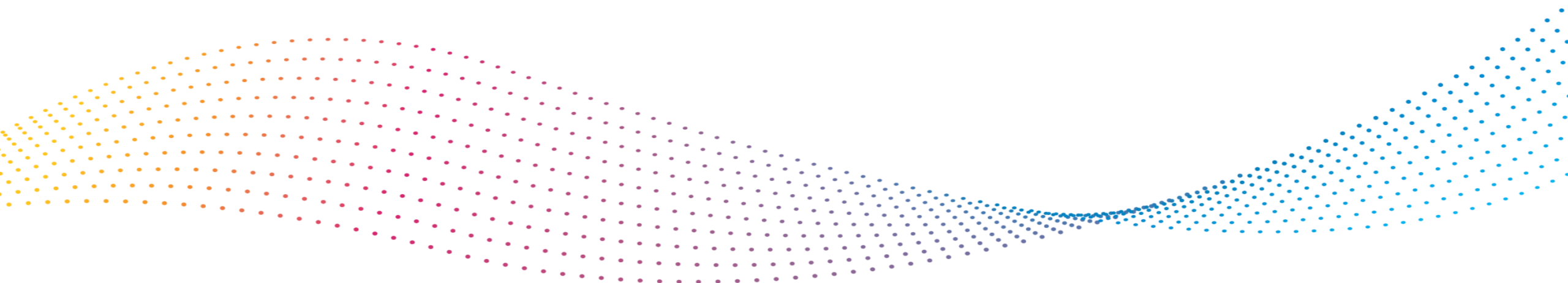


AGENT CONNECT USER GUIDE

2021





AGENT CONNECT USER GUIDE

TABLE OF CONTENTS

Table of Contents

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



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

INTRODUCTION

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

AGENT CONNECT & AGENT WORKFLOW ACCESS

SINGLE SIGN-ON PORTAL (SSO)

- [Register your Single Sign-On Portal: via Email from NO-REPLY@SAILPOINT.COM](#)
- [Register your Single Sign-On Portal: via IdentityNow website](#)
- [Forgot Login Credentials / Problems Signing In](#)
- [Agent Connect Login and Switch Capability to View as Agency Principal](#)
- [Login to Agent Workflow](#)

AGENT MATERIALS

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

CREATING SUPPORT TICKETS

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

IMPORTANT CONTACTS

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

MEMBER APPLICATION TRACKING

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

COMMISSIONS

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

SECTION 1 - AGENT PROFILE CHANGES

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

SECTION 2 - HIERARCHY & COMMISSION ASSIGNMENT CHANGES, EFT OPTIONS

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

SECTION 3 - REQUIRED FORMS & ACKNOWLEDGEMENT

- [IRS W9 Tax Form](#)

SECTION 4 - LICENSING

- [Confirm Licenses](#)

SECTION 5 - REVIEW & SUBMIT CHANGES

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



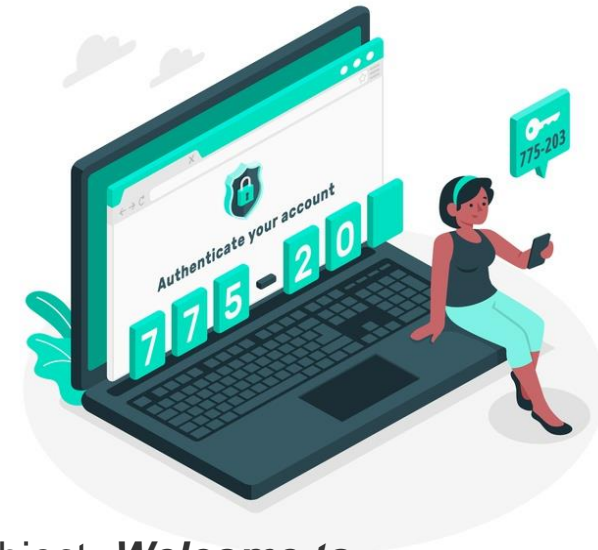
AGENT CONNECT USER GUIDE

SINGLE SIGN-ON PORTAL (SSO)

Single Sign-On Portal (SSO)

OVERVIEW

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



- You will receive an email from no-reply@sailpoint.com with the subject: **Welcome to WellCare Network IdentityNow**
- The email will include your SSO portal username (which is your **6-digit WellCare agent ID**)
- By selecting **Register Now**, you can begin the process of setting your permanent credentials



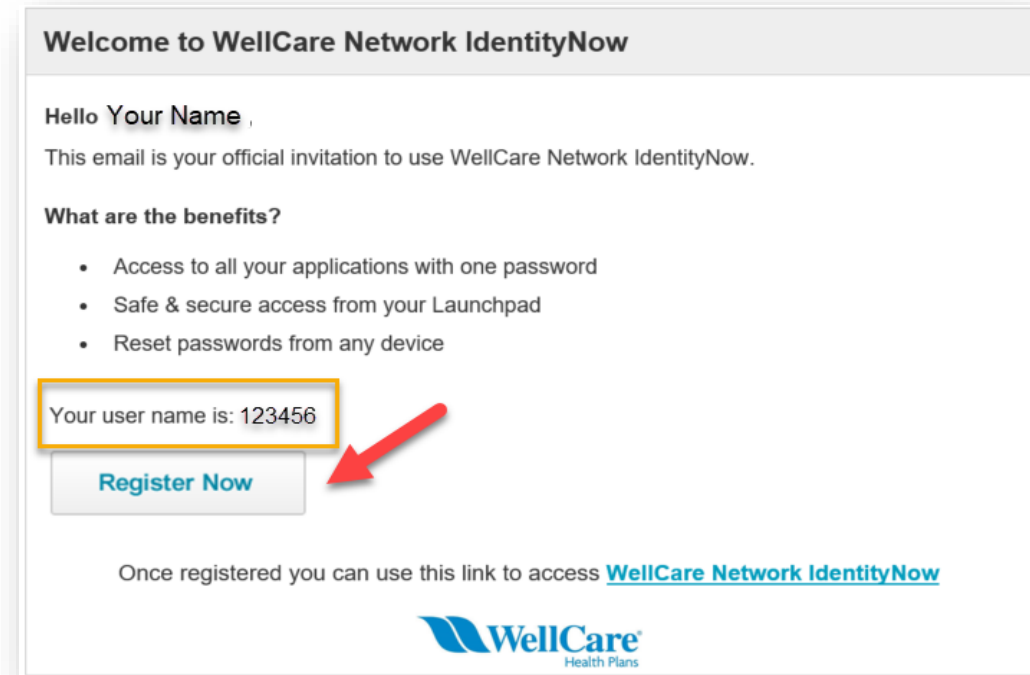
NOTE: Agencies do not have their own Single Sign-On Portal. If you are the Principal of an Agency, please refer to Page 22 for instructions on how to switch views to your agency's portal.

Single Sign-On Portal (SSO)

REGISTER YOUR SINGLE SIGN-ON PORTAL: via EMAIL

From NO-REPLY@SAILPOINT.COM

- Locate the email sent to you from no-reply@sailpoint.com
- Note your Username provided
- Select **Register Now**



Single Sign-On Portal (SSO)


SETTING PERMANENT LOGIN CREDENTIALS

Step 1: Choose a Password

1. Choose a password

Password

Confirm Password

1. Choose a password 

Password

.....

Confirm Password

.....|

Password Requirements:

Your new password must meet the following requirements.

- Minimum characters: 8
- Minimum letters: 1
- Minimum uppercase: 1
- Minimum lowercase: 1
- Minimum digits: 1
- Minimum special characters: 1
- Cannot match any attribute of your identity
- Cannot match any attribute of your account



If your password meets requirements and each entry matches, you will see the **check mark** next to CHOOSE A PASSWORD as shown on the left.



Single Sign-On Portal (SSO)

SETTING PERMANENT LOGIN CREDENTIALS

Step 2: Enter your alternate contact details

2. Enter your alternate contact details

Alternate Phone

Alternate Email

2. Enter your alternate contact details ✓

Alternate Phone

(813) 555-5555

Alternate Email

AgentJohnDoe@example.com

Ensure to use the proper format for both the phone number and email address.

❗ Not a valid phone number. Must be in the format (201) 555-5555 or +1 201-555-5555.

❗ This field should be an e-mail address in the format "user@example.com"










If your alternate phone and emails meet requirements, you will see the check mark next to ENTER YOUR ALTERNATE CONTACT DETAILS as shown on the left image.

Single Sign-On Portal (SSO)

SETTING PERMANENT LOGIN CREDENTIALS

Step 3: Choose and answer 6 security questions

3. Choose and answer security questions 

1. What is your mother's maiden name?		Smith
2. What is your favorite pet's name?		Rover
3. What is your father's middle name?		Peter
4. What city were you born in?		Tampa
5. What is your maternal grandmother's first name?		Claire
6. What is the name of the first street you lived on?		Maple



You must choose 6 questions and provide 6 answers. Once you have selected and answered all 6 questions you will see a check mark.

Please choose answers you will remember easily

Single Sign-On Portal (SSO)

LOGGING INTO YOUR SINGLE SIGN-ON PORTAL

After selecting Register Now, you will be taken to your Single Sign-On Portal login page. **Ensure to bookmark/save** the [WellCare Network IdentityNow](#) link in your browser!

Type in the username provided to you, and the permanent password you set up.

Select **Sign In**



Sign in with your user name

User Name

Password

☒ Remember Me [Problems signing in?](#)

Sign In



Sign in with your user name

User Name

Password

☒ Remember Me [Problems signing in?](#)

Sign In

Single Sign-On Portal (SSO)

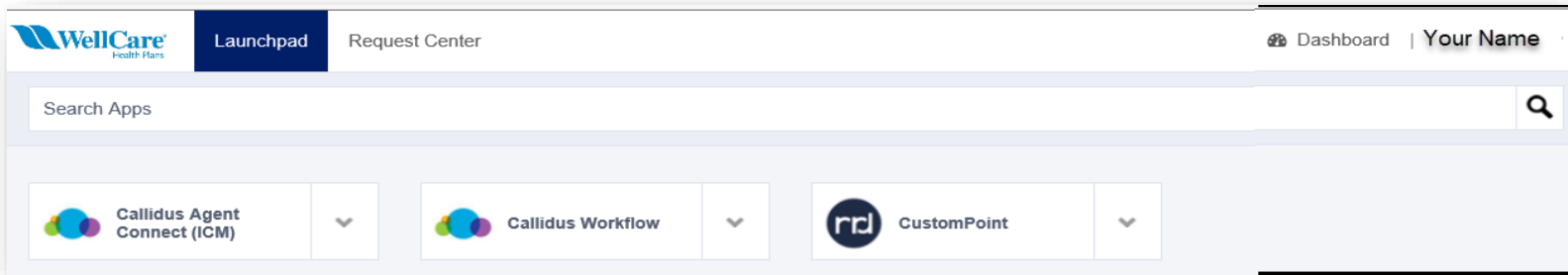
LOGGING INTO YOUR SINGLE SIGN-ON PORTAL

After selecting Sign In, you will be in your Single Sign-On Portal!



NOTE: Access to Agent Workflow will be available in the Phase 3 release!

Select the icons to be directed to the appropriate system.



Custom Point is available 72 hours after all 2021 certification requirements are complete and Agent is Active Certified status

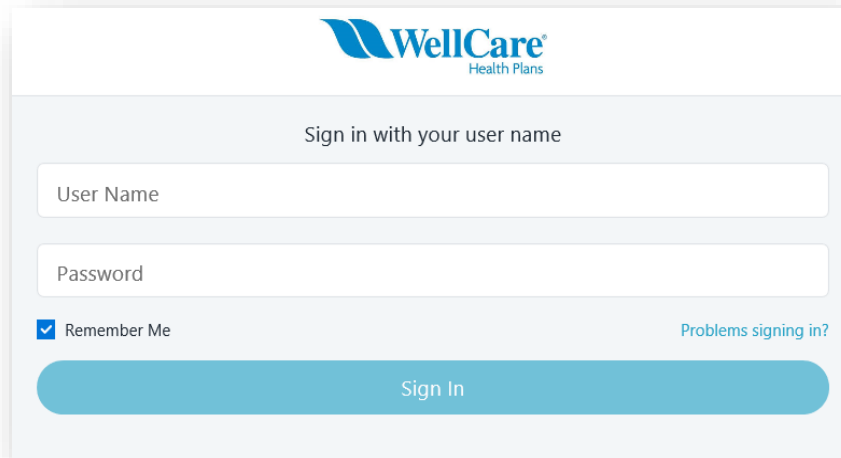
Single Sign-On Portal (SSO)

REGISTER YOUR SINGLE SIGN-ON PORTAL: via IdentityNow Website

Access the IdentityNow site: <https://wellcare.identitynow.com/>

Step 1: Enter your 6-digit WellCare Agent ID in the User Name field

Step 2: Select ***Problem Signing In?***



The image shows the WellCare Health Plans login portal. At the top is the WellCare Health Plans logo. Below it is the text "Sign in with your user name". There are two input fields: "User Name" and "Password". Below the "User Name" field is a checkbox labeled "Remember Me" which is checked. To the right of the "Remember Me" checkbox is a link that says "Problems signing in?". At the bottom is a large blue button labeled "Sign In".

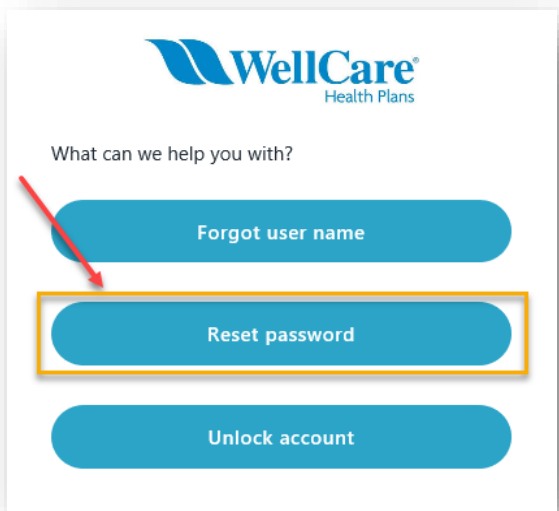


The image shows the WellCare Health Plans login portal with annotations. At the top is the WellCare Health Plans logo. Below it is the text "Sign in with your user name". There are two input fields: "User Name" and "Password". The "User Name" field contains the text "124256" and has a red arrow pointing to it. Below the "User Name" field is a checkbox labeled "Remember Me" which is checked. To the right of the "Remember Me" checkbox is a link that says "Problems signing in?". A red arrow points to the "Problems signing in?" link. At the bottom is a large blue button labeled "Sign In".

Single Sign-On Portal (SSO)

REGISTERING YOUR SINGLE SIGN-ON PORTAL

Step 3: Select **Reset Password**



The screenshot shows the WellCare Health Plans login page. At the top is the WellCare Health Plans logo. Below it is the text "What can we help you with?". There are three blue buttons: "Forgot user name", "Reset password", and "Unlock account". A red arrow points to the "Reset password" button, which is also highlighted with a yellow border.

Step 4: Enter your 6-digit WellCare Agent ID in the **User Name** field

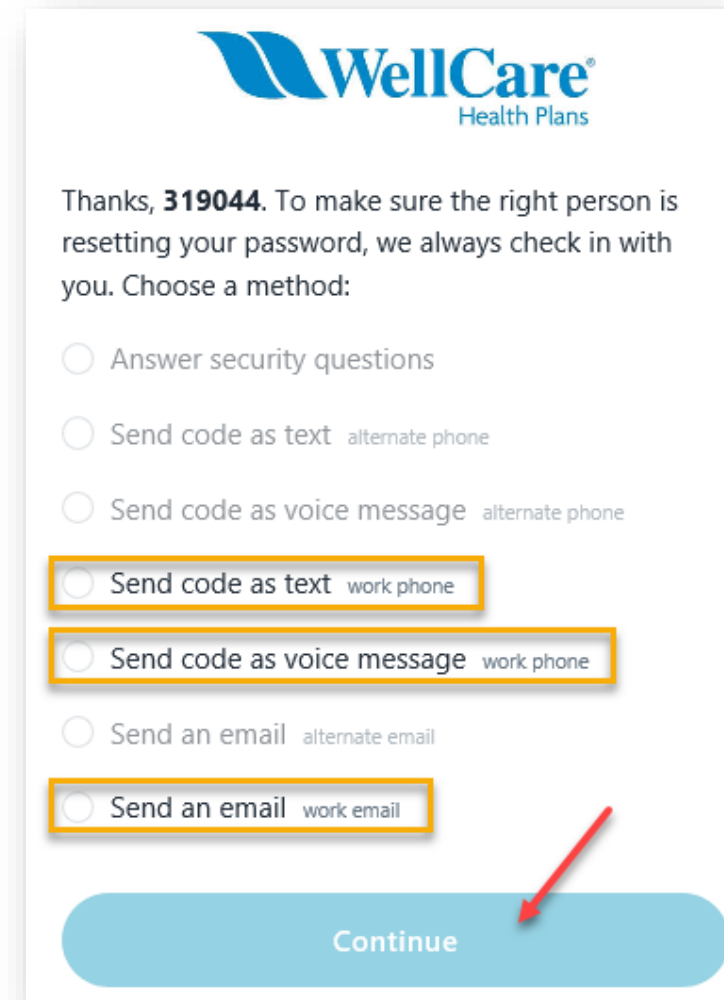


The screenshot shows the WellCare Health Plans password reset page. At the top is the WellCare Health Plans logo. Below it is the text "To reset your password, let's start with your user name.". There is a "User Name" label above a text input field. The input field contains the text "124256". A red arrow points to the input field. Below the input field is a blue "Continue" button.

Single Sign-On Portal (SSO)

REGISTERING YOUR SINGLE SIGN-ON PORTAL

Step 5: Choose one of the three available options to receive the password reset code then select **Continue**



WellCare[®]
Health Plans

Thanks, **319044**. To make sure the right person is resetting your password, we always check in with you. Choose a method:

- ☐ Answer security questions
- ☐ Send code as text alternate phone
- ☐ Send code as voice message alternate phone
- ☐ Send code as text work phone
- ☐ Send code as voice message work phone
- ☐ Send an email alternate email
- ☐ Send an email work email

Continue

Single Sign-On Portal (SSO)

REGISTERING YOUR SINGLE SIGN-ON PORTAL

Step 6: Enter the Password Reset Code provided, then select **Continue**

Your Password Reset Code is
582072

Today at 12:00 PM

Dear Agent Name

A request has been made to reset your WellCare Network IdentityNow password. If you made this request, please copy the following code into the prompt in WellCare Network IdentityNow to verify your identity:

582072

This code expires as soon as it's used, or on Wednesday 28 August 2019 (16:10:20 UTC).

If you did not make this request, please contact your IT administrator immediately.

Thanks,
The WellCare Network IdentityNow Team



Please verify your identity using:

Send an email

Code

.....

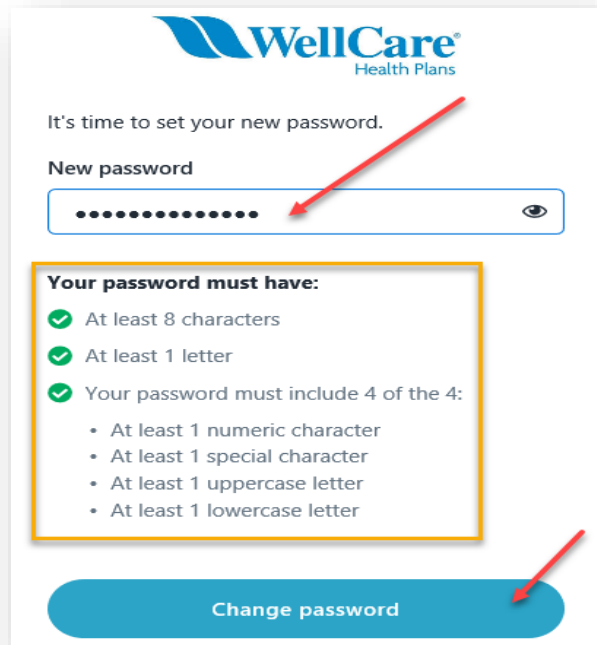


Continue

Single Sign-On Portal (SSO)

REGISTERING YOUR SINGLE SIGN-ON PORTAL

Step 7: Type in a **NEW** password, then select **Change Password**



WellCare[®]
Health Plans

It's time to set your new password.

New password

.....

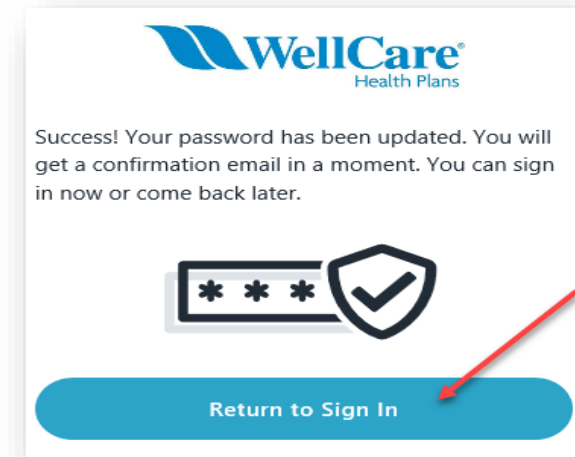
Your password must have:

- ✓ At least 8 characters
- ✓ At least 1 letter
- ✓ Your password must include 4 of the 4:
 - At least 1 numeric character
 - At least 1 special character
 - At least 1 uppercase letter
 - At least 1 lowercase letter

Change password

*Ensure to note the password requirements. If your password meets requirements and each entry matches, you will see three green **check marks** as shown above.*

Step 8: If your password was successfully changed, select **Return to Sign In**.



WellCare[®]
Health Plans

Success! Your password has been updated. You will get a confirmation email in a moment. You can sign in now or come back later.

Return to Sign In

Single Sign-On Portal (SSO)

REGISTERING YOUR SINGLE SIGN-ON PORTAL

Step 9: To continue the setup of your account and access your Single Sign-On portal, type in your **Username** (6-digit agent ID) and the **password** you just created.



The screenshot shows the WellCare Health Plans login interface. At the top is the WellCare Health Plans logo. Below it, the text "Sign in with your user name" is displayed. There are two input fields: the first contains the username "124256" and the second contains a masked password represented by dots. A red arrow points to the username field, and another red arrow points to the password field. Below the password field is a checkbox labeled "Remember Me" which is checked, and a link "Problems signing in?". At the bottom is a large blue "Sign In" button, with a red arrow pointing to it.



Please refer to slides 6 through 9 for setting up your permanent login credentials and logging in!

Single Sign-On Portal (SSO)

FORGOT LOGIN CREDENTIALS / PROBLEMS SIGNING IN

If your User Name or Password is not accepted, select **Problems Signing In?** located above the Sign In button.

There are three options to assist with logging in:

1. **Forgot User Name**
2. **Reset Password**
3. **Unlock Account**




The screenshot shows the WellCare Health Plans login interface. At the top is the WellCare Health Plans logo. Below it is the text 'Sign in with your user name'. There are two input fields: 'User Name' and 'Password'. Below the 'User Name' field is a checkbox labeled 'Remember Me' which is checked. To the right of the 'Password' field is a link that says 'Problems signing in?'. A red arrow points from this link towards the 'Sign In' button. The 'Sign In' button is a large blue button at the bottom of the form.

Single Sign-On Portal (SSO)

REGISTERING YOUR SINGLE SIGN-ON PORTAL

Option 1

Forgot User Name will prompt you to enter your email address. Enter your email address and click **Send Email** button.



Enter the email address for your account

Email address


Send email

Single Sign-On Portal (SSO)

REGISTERING YOUR SINGLE SIGN-ON PORTAL

Option 2


Reset Password option will prompt you to enter your User Name, then choose a method to verify your identity before resetting your password.



To reset your password, let's start with your user name.

User Name

Continue



Thanks, **319044**. To make sure the right person is resetting your password, we always check in with you. Choose a method:

☐

Answer security questions

☐

Send code as text alternate phone

☐

Send code as voice message alternate phone

☐

Send code as text work phone

☐

Send code as voice message work phone

☐

Send an email alternate email

☐

Send an email work email


Continue

Single Sign-On Portal (SSO)

REGISTERING YOUR SINGLE SIGN-ON PORTAL

Option 3


Unlock Your Account option will prompt you to enter your User Name, then choose a method to verify your identity before resetting your password.



To unlock your account, let's start with your user name.

User Name

Continue



Thanks, **319044**. To make sure the right person is unlocking your account, we always check in with you. Choose a method:

☐

 Answer security questions

☐

 Send code as text alternate phone

☐

 Send code as voice message alternate phone

☐

 Send code as text work phone

☐

 Send code as voice message work phone

☐

 Send an email alternate email

☐

 Send an email work email

Continue

 Complete all required steps in order to re-access your portal!

Single Sign-On Portal (SSO)

AGENT CONNECT LOGIN & SWITCH CAPABILITY TO VIEW AS AGENCY PRINCIPAL

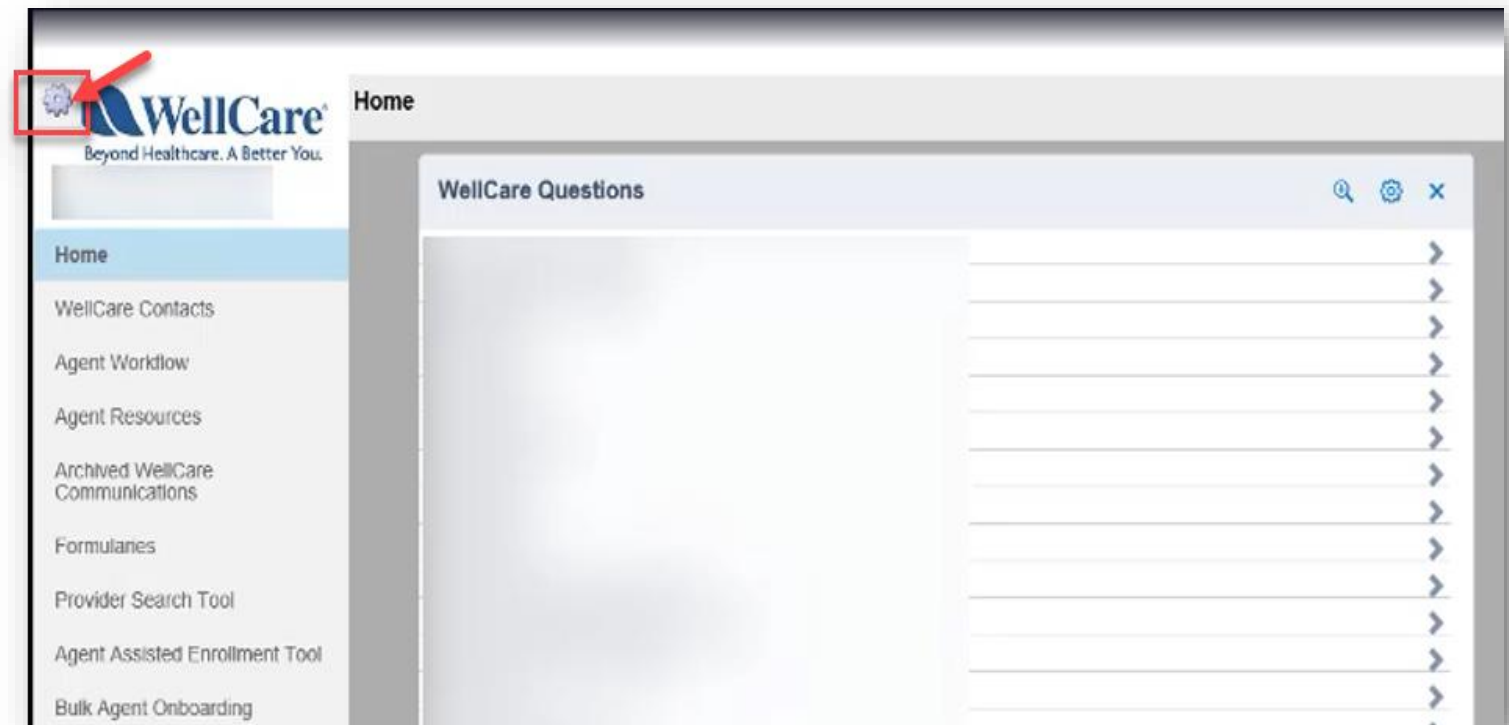
Principal brokers who own Agencies have the ability to switch views between the two broker portals without logging out and relogging in.

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

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



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



Single Sign-On Portal (SSO)

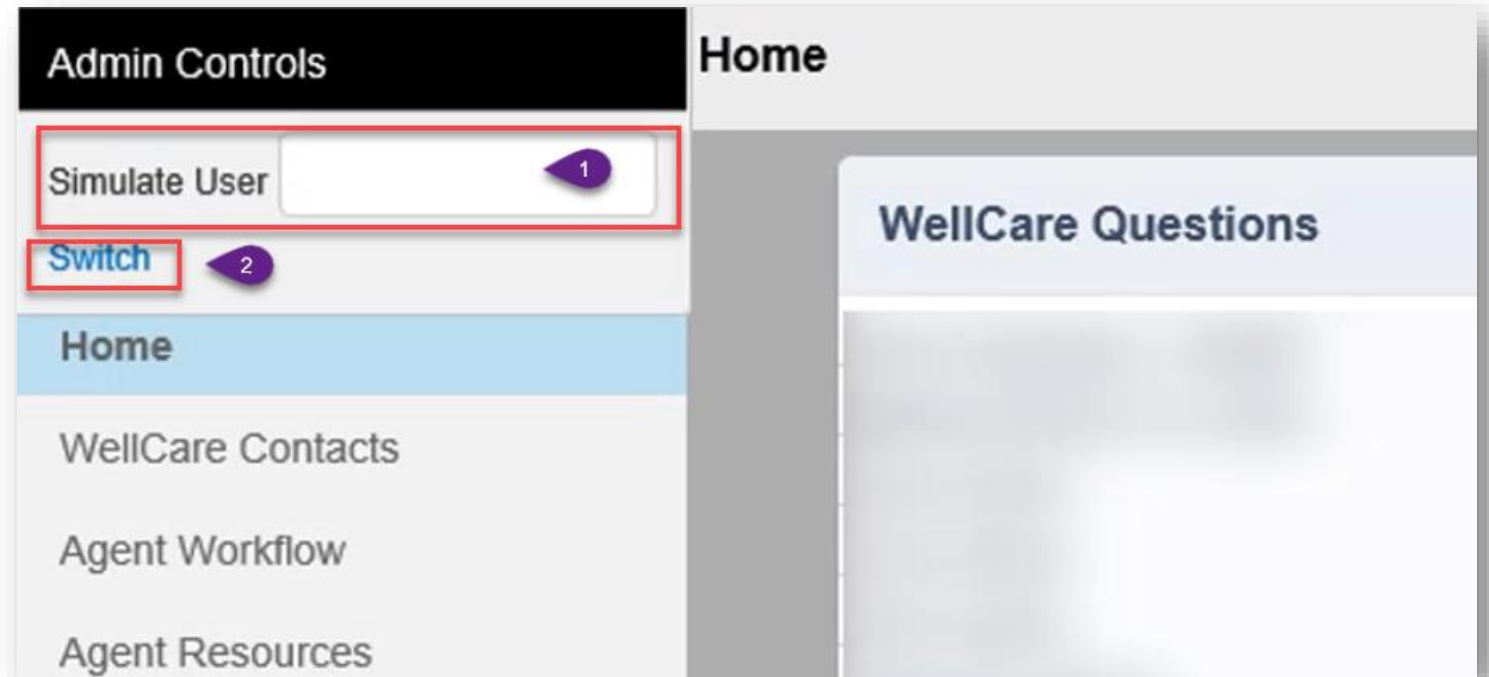
AGENT CONNECT LOGIN & SWITCH CAPABILITY TO VIEW AS AGENCY PRINCIPAL

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

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



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

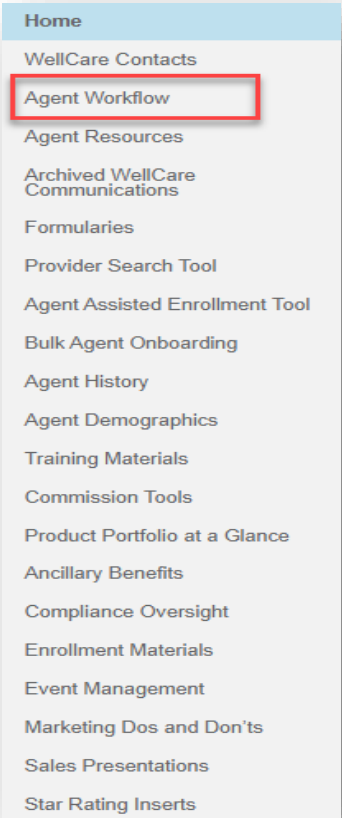


Single Sign-On Portal (SSO)

LOGIN TO AGENT WORKFLOW

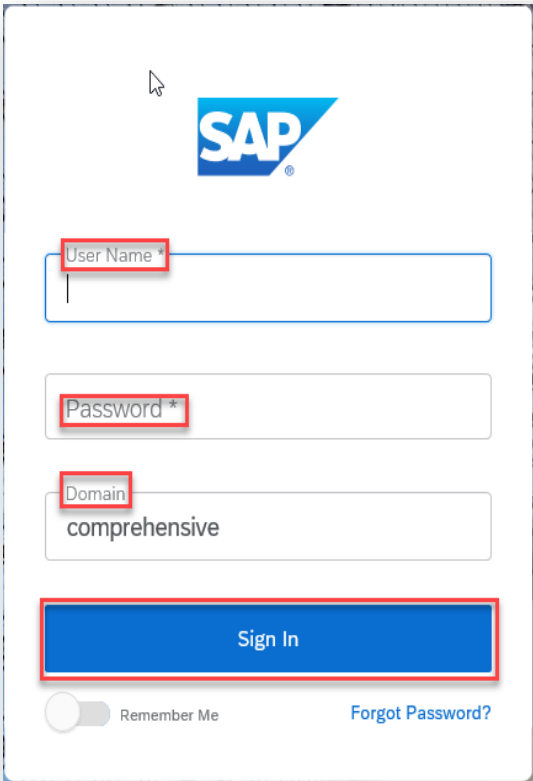
Login to Agent Workflow from your portal homepage with your Login name (email) and initial temporary password to make changes to your broker profile.

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



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

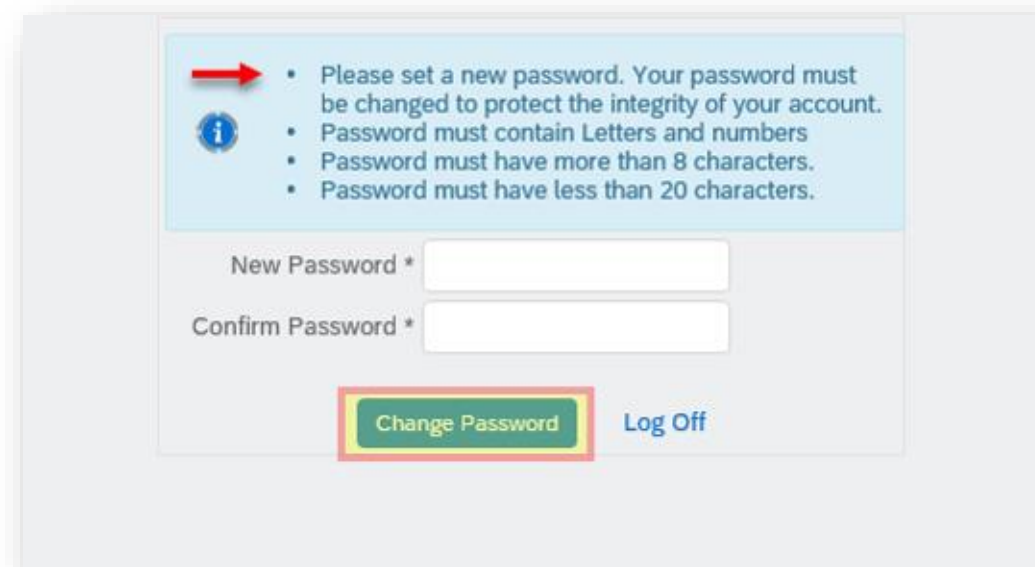
 **NOTE:** Domain name is **COMPREHENSIVE**



Single Sign-On Portal (SSO)

LOGIN TO AGENT WORKFLOW

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



The screenshot shows a web form for changing a password. At the top, a light blue box contains a red arrow pointing to an information icon (a blue circle with a white 'i') and a list of password requirements:

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

Below this box are two input fields: "New Password *" and "Confirm Password *". At the bottom of the form, there is a green button labeled "Change Password" and a blue link labeled "Log Off". The "Change Password" button is highlighted with a red and yellow border.



AGENT CONNECT USER GUIDE

AGENT MATERIALS

ENROLLMENT MATERIALS

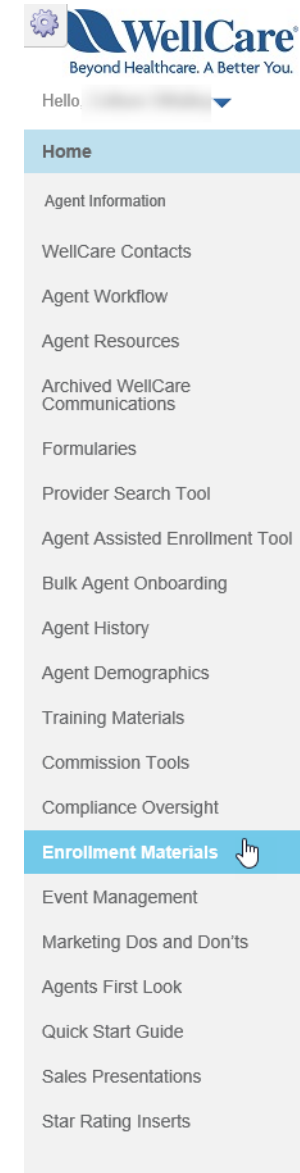
LOCATING ENROLLMENT FORMS AND OTHER MATERIALS IN AGENT CONNECT

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

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

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

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



TRAINING MATERIALS

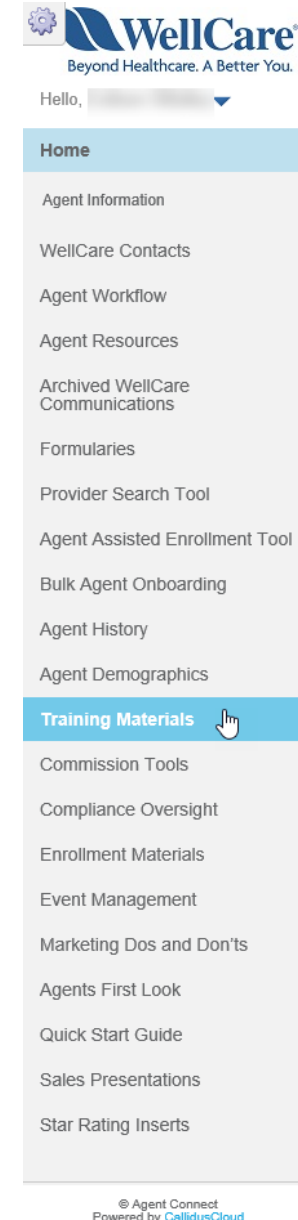
LOCATING TRAINING DOCUMENTS AND OTHER USEFUL GUIDES IN AGENT CONNECT

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

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

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

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





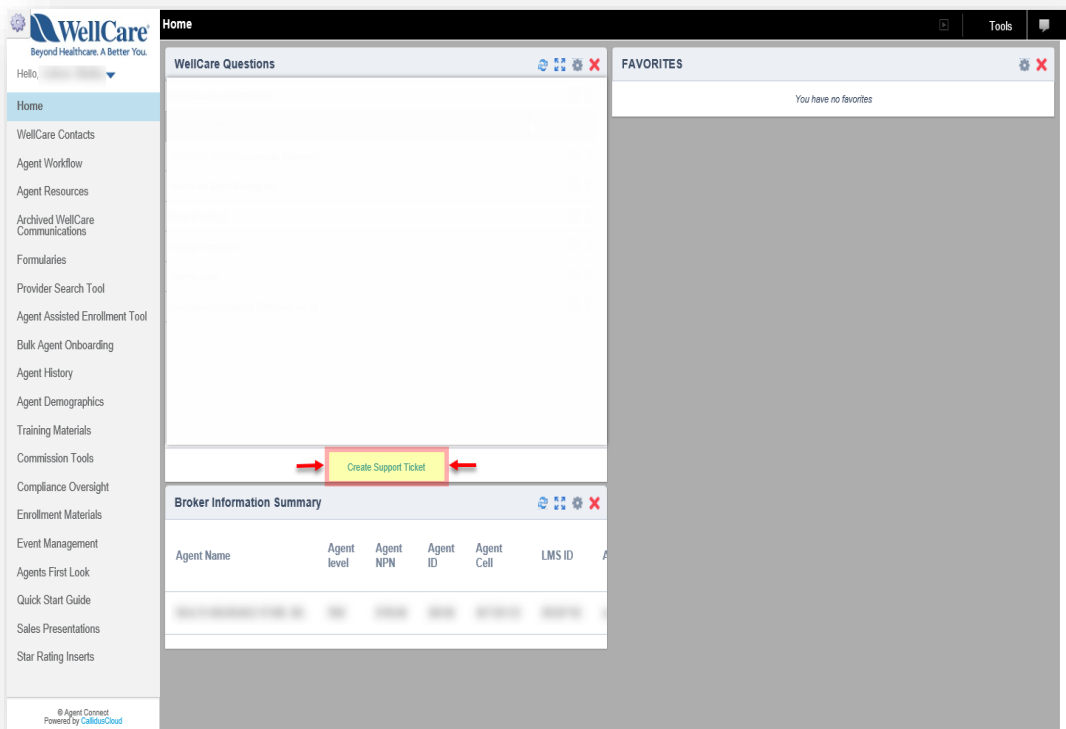
AGENT CONNECT USER GUIDE

CREATING SUPPORT TICKETS

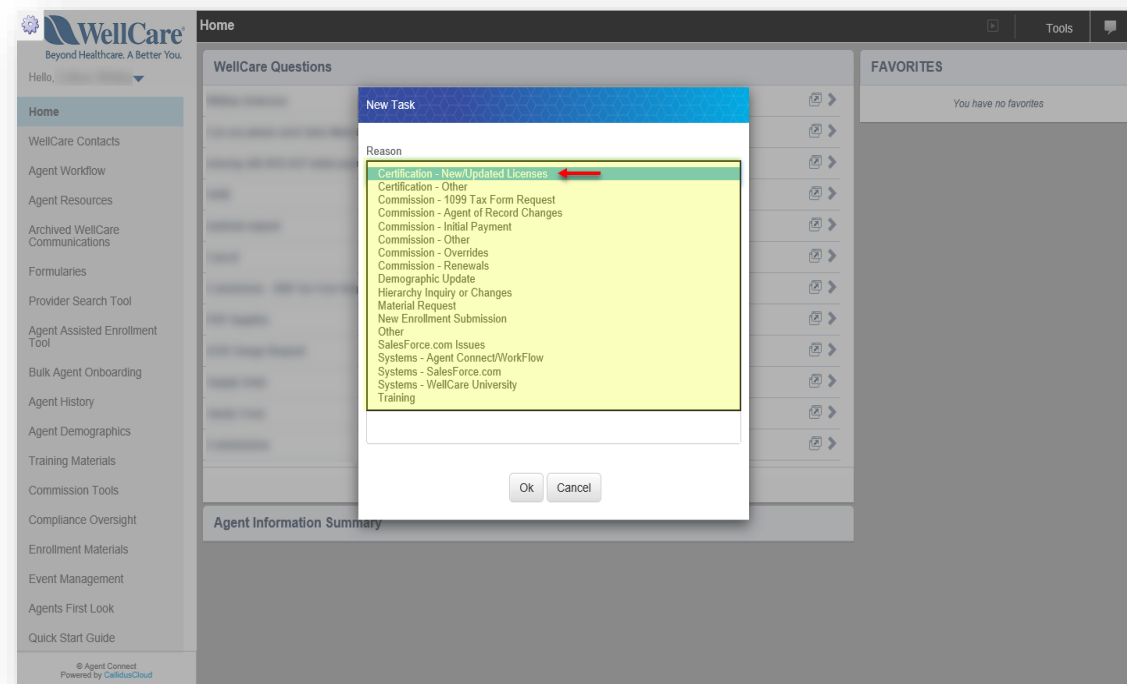
CREATING SUPPORT TICKETS

CREATING SUPPORT TICKET IN AGENT CONNECT PORTAL

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



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



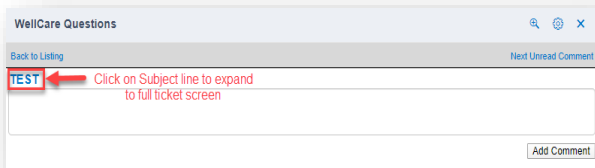
CREATING SUPPORT TICKETS

CREATING SUPPORT TICKET IN AGENT CONNECT PORTAL

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

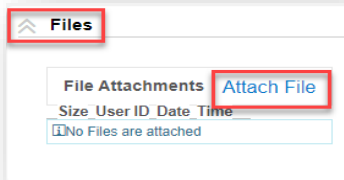
Step 1: Click the **boxed arrow** symbol to the right of the subject line, after you have submitted the ticket ➡

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



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

Step 4: Click **Attach File**



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

Step 6: Click **Save**

A screenshot of the 'Task Detail' view for a ticket. It contains several input fields: Task ID, Task Type ID (set to 'Other - Other'), Task Status #, Task Name (set to 'TEST'), Task Queue ID (set to 'Producer Services'), Priority (a dropdown menu), Assign To, Due Date, and a Description field (set to 'Producer portal user inquiry'). Below these fields are expandable sections: 'UserRef Fields', 'DateRef Fields', 'Comments (2)', 'Related Entities (1)', 'Task Activity (8)', 'Notes', 'Files' (highlighted with a red box), and 'Comments'. The 'Task Activity' section shows a table with columns for 'Add', 'Sort Ascending', '<< Hide All', '>> Show All', and a list of activities with dates and times.

CREATING SUPPORT TICKETS

ATTACHING FILE TO SUPPORT TICKET

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

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

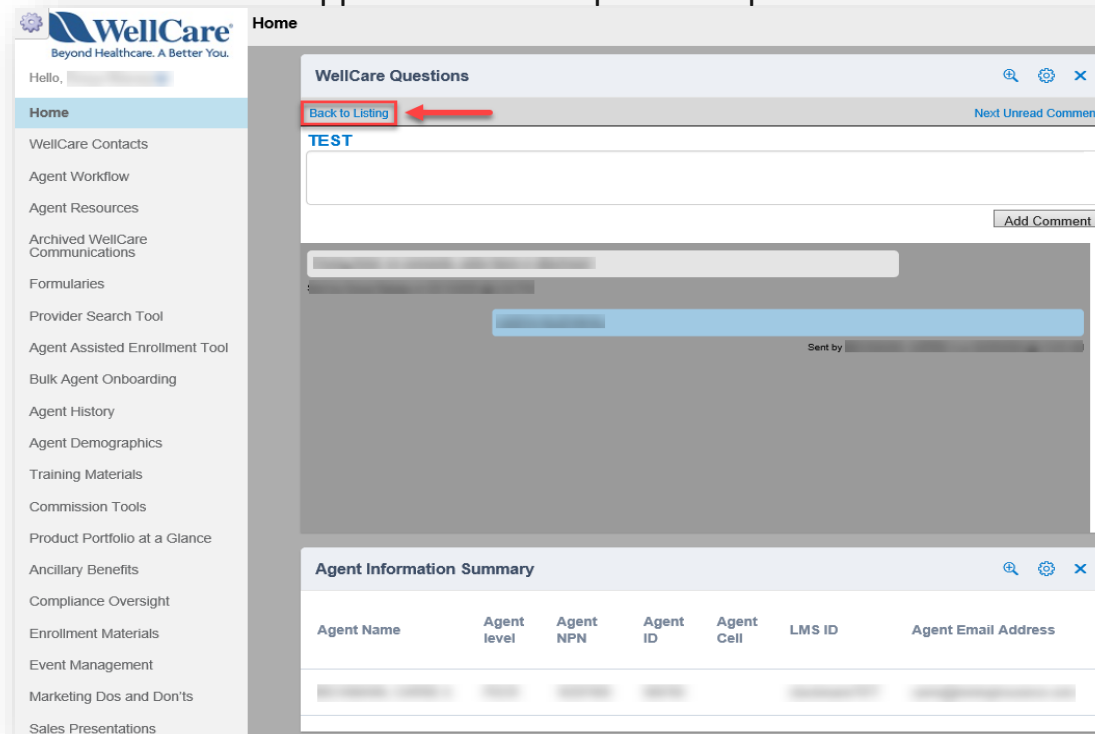
The screenshot displays the 'Agent Connect' web application interface. The main window shows the 'Task Detail' form with fields for Task ID, Task Type ID, Task Name, Task Queue ID, Assign To, Due Date, and Description. Below the form are sections for 'UserRef Fields', 'DateRef Fields', 'Comments', 'Related Entities', and 'Notes'. The 'Files' section is highlighted with a red circle and a '1'. An 'Add File Attachment' dialog box is open in the foreground. The dialog box has a 'Task ID' field, a 'Choose File' button highlighted with a red circle and a '2', and a 'Save' button highlighted with a red circle and a '3'. A red arrow points to the file name 'Agent Conne...5.2019.pdf'.

CREATING SUPPORT TICKETS

MONITORING SALES SUPPORT RESPONSE TO YOUR TICKET

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

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





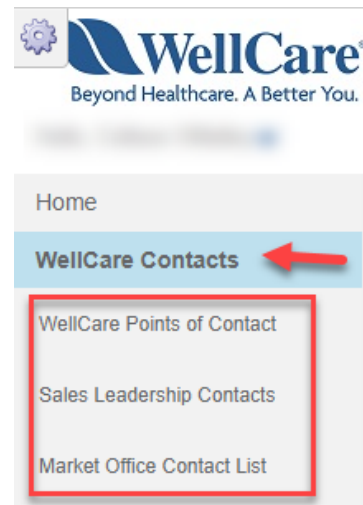
AGENT CONNECT USER GUIDE

IMPORTANT CONTACTS

IMPORTANT CONTACTS

WELLCARE CONTACTS AND RESOURCES

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



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

WellCare Contacts and Resources

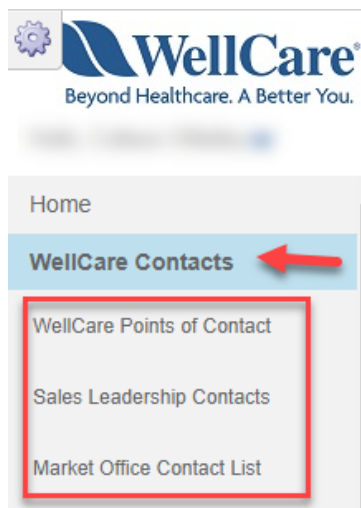
Contact Point	Purpose	Contact Information
Applications and Enrollment		
Telephonic Scope of Appointment (SOA)	Document SOA via phone	MAPD: 877-780-3920 PDP: 877-297-3625
Medicaid Eligibility	Verify Medicaid eligibility	866-211-0544
Online Formulary Tool	Utilize during sales presentations	https://www.wellcare.com/Producers/Formularies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



IMPORTANT CONTACTS

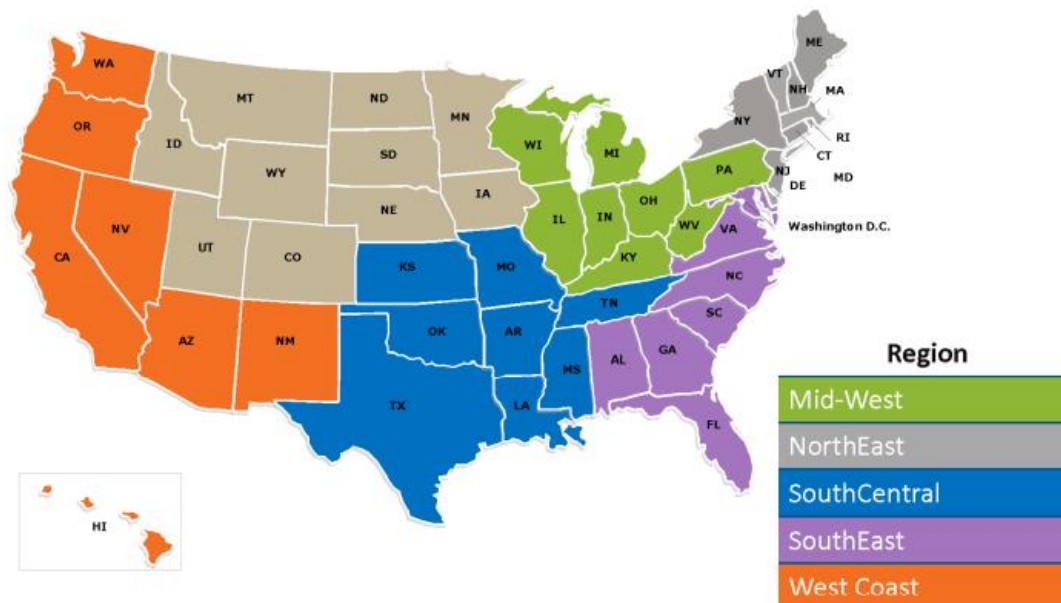
SALES LEADERSHIP CONTACTS

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



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

Regional Sales Leadership



CENTENE Corporation

Confidential and Proprietary Information

2



AGENT CONNECT USER GUIDE

MEMBER APPLICATION TRACKING

MEMBER APPLICATION TRACKING

TRACKING NEW MEMBER APPLICATION SUBMISSION USING APPLICATION SEARCH TOOL

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

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

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

The screenshot shows the WellCare Application Search Tool interface. On the left, a sidebar menu lists various tools, with 'Agent History' highlighted by a red box. The main content area is titled 'Application Search Tool' and contains a search form. The form has several input fields: 'SignatureDate', 'Application Status' (a dropdown), 'Producer ID', 'Member Name', 'Plan ID', 'Effective Date', and 'ApplicationID'. A red box highlights the top section of the form, including the 'SignatureDate' and 'Application Status' fields. Below the form are buttons for 'Search', 'Clear', 'New', and 'Delete'. The 'Search' button is also highlighted with a red box. Below the buttons is a table with the following columns: 'Producer Name', 'Producer ID', 'ApplicationID', 'Member Name', 'Plan ID', 'Application Status', 'RFI Description', 'SignatureDate', and 'Effective Date'. The table contains several rows of data, which are slightly blurred. In the bottom left corner of the sidebar, the 'Application Search Tool' menu item is highlighted with a red box and a red arrow points to it.

MEMBER APPLICATION TRACKING

TRACKING MEMBER APPLICATION SUBMISSION USING APPLICATION SEARCH TOOL (continued)

The application information is displayed.

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

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

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

MEMBER APPLICATION TRACKING

LOCATING & RESOLVING MEMBER APPLICATION THAT IS IN RFI STATUS

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

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

Step 2: Click **Search**

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

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Agent Resources

Archived WellCare Communications

Formularies

Provider Search Tool

Agent Assisted Enrollment Tool

Bulk Agent Onboarding

Agent History

Statements

Application Search Tool

Hide Search

SignatureDate:

Producer ID:

Plan ID:

Member Name:

Effective Date:

Application Status: RFI

Search

Clear

New

Delete

Producer Name

Producer ID

Future disenroll

Future Enroll

Pending Review

Plan-Change

Possible duplication app under review

Rejected

Rejected-Enrolled in other plan

Request for additional information sent

RFI

RFI - Election type not found

RFI - ESRD Question Not Answered

RFI - HICN Not Found

RFI - Missing SNP Verification

RFI - No Part A and/or B

RFI - No Permanent Address in our Service Area

RFI - No Permanent Address on Application

RFI - No Plan Selection

RFI - No Signature

1 Month RDE

2 Month RDE

ApplicationID:

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

MEMBER APPLICATION TRACKING

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

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

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

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



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Hello, [User Name]

Customer Application Detail

Name and Contact Information

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

Personal Information

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

RFI Description

RFI Description: [Dropdown Menu: RFI - HICN Not Found]

Files

Comments



AGENT CONNECT USER GUIDE

COMMISSIONS

COMMISSIONS

LOCATING & DOWNLOADING COMMISSION STATEMENTS

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

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

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

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

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

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

COMMISSIONS

DOWNLOADING STATEMENT EXTRACT

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

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

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

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Agent Resources

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Formularies

Provider Search Tool

Agent Assisted Enrollment Tool

Bulk Agent Onboarding

Agent History

Statements

Payment History

Book of Business

Book of Business Extract

Application Search Tool

Training History

WellCare University

Agent Demographics

Statements

Member Effective Year: Member Effective Month: Statement Date:

Search

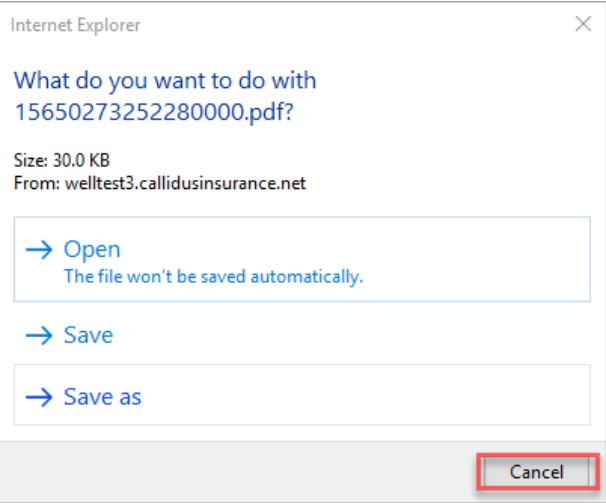
Clear

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

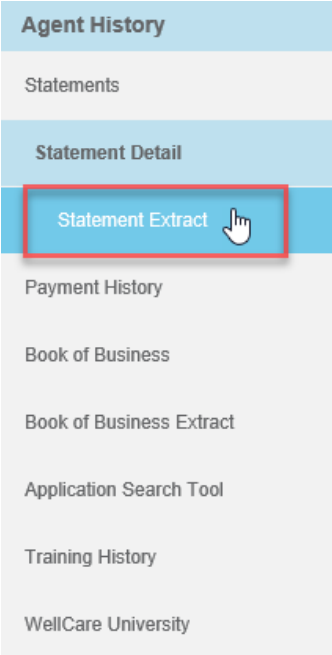
COMMISSIONS

DOWNLOADING STATEMENT EXTRACT

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



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



COMMISSIONS

DOWNLOADING STATEMENT EXTRACT

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

Statement Extract

Run

Save

Writing Agent PID

Writing Agent Name

Save

Your requested report has the following 'Save as' options. Please tap one of the available items to save in that format.

CSV

CSV (Comma-separated values)
Use this format to create comma separated files.
* CSV. This format is widely adopted by many software programs, and is commonly viewed with Excel or Notepad.

XLS

XLS (Microsoft Excel)
Use this format to create a Microsoft Excel file.
* XLS. This format is commonly opened with Microsoft Excel. If the values in this format are not properly formatted, try the *.CSV option instead.

New Window

New Window
View content in new window

Cancel

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

Do you want to open or save StatementExtract15924142527920000.xls from welltest3.callidusinsurance.net?

Open

Save

Cancel

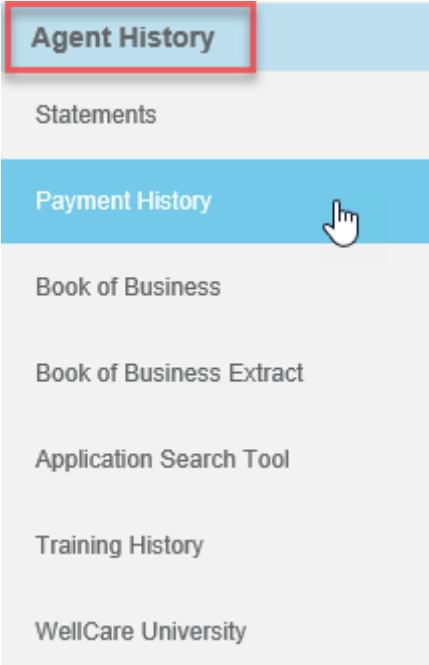
x

COMMISSIONS

VIEWING PAYMENT HISTORY

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

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



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

Payment History

Payment Period:

Period:

Payment Status:

Release Date:

Producer ID:

Rec Type:


Hold Code:

Subscriber ID:

Search

Clear

VIEWING PAYMENT HISTORY

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

[illegible]

Export Data Form Search Form

Export Data Selection

☐ All records matching search criteria limited to 75000 records

☒ All records matching search criteria (limited to 75000)

Format

☒ Include Header Row?

☒ Excel 97-2003 (*.xls) (limited to 65536)

☐ Excel (*.xlsx)

☐ Comma Delimited (CSV)

☐ Delimited: ,

Ok

Cancel

Step 5: Open or Save the Excel download.

Do you want to open or save **BrokerHistoryBrokerPortalSF115924176795110000.xls** (9,50 KB) from **wellcare.callidusinsurance.net**?

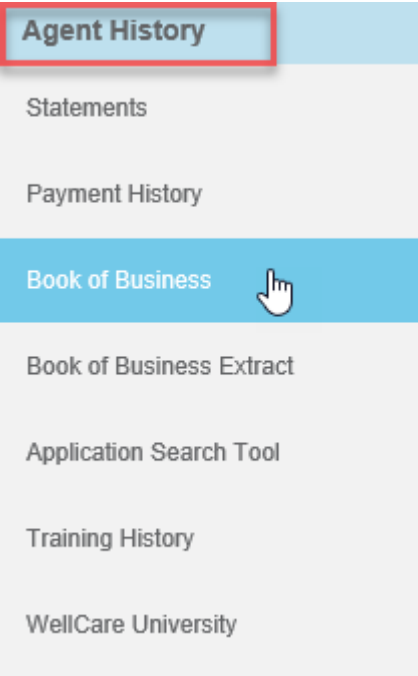
Open Save Cancel

COMMISSIONS

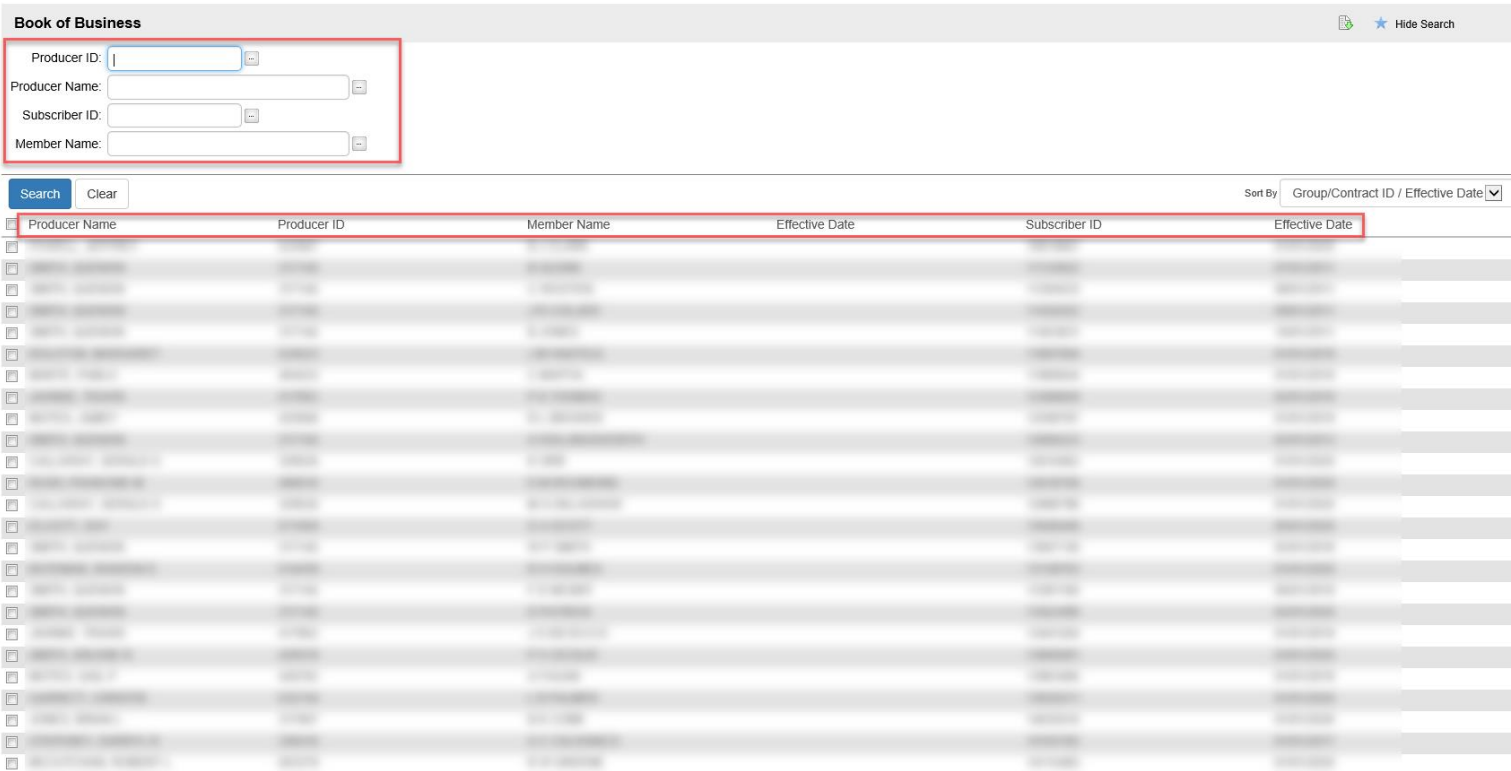
VIEWING YOUR BOOK OF BUSINESS

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

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



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



COMMISSIONS

DOWNLOADING BOOK OF BUSINESS

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

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

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

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

The screenshot displays the WellCare Agent Connect interface. On the left, a navigation menu lists various options, with 'Agent History' highlighted. Under 'Agent History', the 'Book of Business Extract' sub-tab is selected, indicated by a red arrow. The main content area is titled 'Book of Business' and features a 'Report Form' section. This section includes two input fields for 'FromDate' (20190101) and 'ToDate' (20211231), both highlighted with red boxes. Below these fields are three buttons: 'Run' (highlighted with a red box), 'Clear', and 'Fullscreen'. The 'Available Parameters' section below the buttons provides instructions for the date formats: 'Please enter From Date in YYYYMMDD format' and 'Please enter To Date in YYYYMMDD format'.

COMMISSIONS

DOWNLOADING BOOK OF BUSINESS (continued)

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

The screenshot displays the WellCare 'Book of Business' interface. In the top navigation bar, the 'Save' button is highlighted with a red box and a red arrow. The left sidebar shows the 'Agent History' link highlighted with a red box. A 'Save' dialog box is open in the bottom right, showing options to save the report as CSV, XLS, or New Window. The instruction 'Please tap one of the available items to save in that format' is highlighted with a red box.



AGENT CONNECT USER GUIDE

AGENT PROFILE CHANGES

AGENT PROFILE CHANGES

AGENT 360 VALIDATION

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

Step 1: Login to Agent Workflow

Step 2: Click Agent 360

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

The screenshot displays the Agent 360 web application interface. On the left, a sidebar menu contains links for 'Home', 'AGE Agent360' (highlighted with a red box and arrow), 'INV ManualMassTransactions', and 'Find Cases'. The main content area is titled 'Agent 360' and features a welcome message: 'Welcome to Wellcare's Agent 360!'. Below this, it lists categories for profile management: 'Change your demographic information', 'Manage commission assignment elections', and 'Request hierarchy re-assignment'. An 'Agent Search' section follows, with a note about security and identity validation. It includes input fields for 'Producer ID', 'NPN', and 'SSN', and a 'Search' button (highlighted with a red box and arrows) and a 'Submit' button. The top navigation bar includes 'New Case +', 'Case ID', and a search icon.


AGENT PROFILE CHANGES

AGENT 360 VALIDATION (continued)

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

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

Agent 360



Welcome to Wellcare's Agent 360!

Agent360 allows you to view and manage your profile information in the following categories:

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

Agent Search

For security purposes, please validate your identity by providing one of the following identifiers: **Producer ID, NPN, or SSN.**

Note: If the record indicates an **INELIGIBLE** status, this indicates a maintenance activity involved with your record. Please try again at a later time. If you have any questions, please contact WellCare at salesupport@wellcare.com.

Producer ID: 300014

NPN:

SSN:

Search

Agent Search Results

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

Search Results

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

1 total rows, displaying from 1 to 1

Submit

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54

DEMOGRAPHIC CHANGES TO YOUR PROFILE

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

Demographics

1
Agent Demographics

2
 Hierarchy Assignment

3
 W9

4
 Confirm Licenses

5
 Review and Submit

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

Demographics

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

Process ID:
 Agent 360-SelfServ-

Agent Summary ⌵

Agent Name:
 Agent Producer ID:

Agent/Principal Information ⌵

Please enter/modify the following demographic information below.

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

Address Information ⌵

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

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



AGENT CONNECT USER GUIDE

HIERARCHY & COMMISSION ASSIGNMENT CHANGES

HIERARCHY & COMMISSION ASSIGNMENT CHANGES

HIERARCHY CHANGE / ASSIGNMENT

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

Upline and Commission Change

1Agent Demographics Assignment

2Hierarchy Assignment

3W9

4Confirm Licenses

5Review and Submit

Hierarchy Assignment

Please review/update your hierarchy and commission assignment information.

Process ID: Agent 360-SelfServ-45571

Agent Summary

Agent Name: SMITH, ANDREW J

Company Name: N/A

FMO: WELLCARE FMO

Agent Producer ID: 598083

Company Producer ID: N/A

Upline

Below is your current upline information.

Name: WELLCARE FMO

Full Assignment Model: No

Producer ID: 300014

Title: WellCare FMO

Request Upline Change

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

☐ Request Transfer

Commission Assignment

Below is your current assignment information.

Name: WELLCARE FMO

Producer ID: 300014

Assignment Search

Change Commission Assignment

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

☐ Request Transfer

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

☐ Self

☐ My Company

☐ My Upline

☐ Other Hierarchy

☐ Search

Producer ID:

Search

Assignment Search Results

Choose Assignment

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

Producer ID	Name	Title	Full Assignment	Eligible
Nothing found to display				

0 total rows, displaying from 0 to 0

Confirm Request

Assignment Summary

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

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

HIERARCHY & COMMISSION ASSIGNMENT CHANGES

HIERARCHY CHANGE PROCESS

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

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

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

Upline and Commission Change

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

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

Agent Summary

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

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

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

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

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

Upline Search Results

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

1 total rows, displaying from 1 to 1

[Confirm Request]

HIERARCHY & COMMISSION ASSIGNMENT CHANGES

HIERARCHY CHANGE/ASSIGNMENT – REJECTED

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



HIERARCHY & COMMISSION ASSIGNMENT CHANGES

HIERARCHY CHANGE/ASSIGNMENT – COMPLETE

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



HIERARCHY & COMMISSION ASSIGNMENT CHANGES

COMMISSION CHANGE / ASSIGNMENT & EFT OPTIONS

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

Select one of the following:

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

Click **Confirm Request**

The screenshot shows a web form titled "Commission Assignment" with a red box around the title. Below the title, it says "Below is your current assignment information." and shows fields for "Name:" and "Producer ID:". Below this is a section titled "Assignment Search" with a red box around it. Under "Assignment Search", there is a section titled "Change Commission Assignment" with the text "If you would like to change your commission assignment check the Change Commission Assignment box below." Below this is a checkbox labeled "Request Transfer". Below the checkbox, there is a paragraph of text explaining the options. Below the paragraph, there is a row of radio buttons with labels: "Self", "My Company", "My Upline", "Other Hierarchy", and "Search". The "Self" radio button is selected and is highlighted with a red box. Below the radio buttons is a text input field labeled "Producer ID:" and a blue "Search" button.

HIERARCHY & COMMISSION ASSIGNMENT CHANGES

COMMISSION CHANGE / ASSIGNMENT OPTIONS

Self/ My Company:

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

Electronic Funds Transfer (EFT)

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

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

EFT Flag: 0

Account Type: ☒ Checking ☐ Savings

Routing Number: *

Bank Name:

Account Number: *

Confirm Account Number: *

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

Previous

Next

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62

HIERARCHY & COMMISSION ASSIGNMENT CHANGES

COMMISSION CHANGE / ASSIGNMENT OPTIONS

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

Assignment Summary

Electronic Funds Transfer (EFT)

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

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

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

EFT Flag: 1

Bypass EFT: ☒ Bypass

EFT Flag: 1

Bypass EFT: ☐ Bypass

Account Type: ☒ Checking ☐ Savings

Routing Number: *

Account Number: *

Bank Name:

Confirm Account Number: *

HIERARCHY & COMMISSION ASSIGNMENT CHANGES

COMMISSION CHANGE / ASSIGNMENT OPTIONS

My Upline:

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

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

The screenshot shows a web form titled "Assignment Search". It has a section "Change Commission Assignment" with a checkbox "Request Transfer" that is checked. Below this, there are radio buttons for "Self", "My Upline" (which is selected), "Other Hierarchy", and "Search". A "Confirm Assignment" section follows, with a "Confirm Request" button at the bottom right.

The screenshot shows the "Agent Summary" page. It displays agent information: Agent Name, Agent Producer ID, Company Name (N/A), Company Producer ID (N/A), and FMO (WELLCARE FMO). Below this is the "Upline" section, showing current upline information: Name (WELLCARE FMO), Producer ID (300014), Full Assignment Model (No), and Title (WellCare FMO). There is a "Request Upline Change" section with a "Request Transfer" checkbox. At the bottom, the "Commission Assignment" section shows current assignment information: Name (WELLCARE FMO) and Producer ID (300014).

HIERARCHY & COMMISSION ASSIGNMENT CHANGES

COMMISSION CHANGE / ASSIGNMENT OPTIONS

Other Hierarchy:

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

Assignment Search

Change Commission Assignment

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

☒ Request Transfer

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

☐ Self ☐ My Upline ☒ Other Hierarchy ☐ Search

Assignment Search Results

Choose Assignment

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

	Producer ID	Name	Title	Full Assignment	Eligible
<input checked="" type="radio"/>	300014	WELLCARE FMO	WellCare FMO	No	ELIGIBLE

1 total rows, displaying from 1 to 1

Confirm Request

Assignment Summary

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

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

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

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

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

HIERARCHY & COMMISSION ASSIGNMENT CHANGES

COMMISSION CHANGE / ASSIGNMENT OPTIONS

Search:

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

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

Assignment Search

Change Commission Assignment

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

☒ Request Transfer

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

☐ Self ☐ My Upline ☐ Other Hierarchy ☒ Search

Producer ID:

Search

Assignment Search Results

Choose Assignment

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

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

1 total rows, displaying from 1 to 1

Confirm Request

Assignment Summary

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

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

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

Abort **Previous** **Next**

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

HIERARCHY & COMMISSION ASSIGNMENT CHANGES

COMMISSION ASSIGNMENT – COMPLETE

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





AGENT CONNECT USER GUIDE

REQUIRED FORMS & ACKNOWLEDGEMENT

REQUIRED FORMS & ACKNOWLEDGEMENT

IRS W9 TAX FORM

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

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

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

Step 3: Sign the W9 with your electronic signature

Step 4: Select Next to continue

Sign W9

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

W-9

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

Process ID: Agent 360-SelfServ-1261

W-9

Review W-9

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

W-9: W-9

Tax Classification

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

Exempt Code Explanations

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

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

Electronic Signature

Acknowledgement

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

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

Signature: [Signature Field] Date: 02/05/2018

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

Signed W-9

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

Signed W-9:

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

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



AGENT CONNECT USER GUIDE

LICENSING

LICENSING

CONFIRM LICENSES

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

Step 1: Check the license information box

Step 2: Provide a reason

Step 3: Click **Next**

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

Confirm Licenses

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

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

Process ID: Agent 360-SelfServ-1261

Agent Summary

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

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

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

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

Licenses

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

1 total rows, displaying from 1 to 1

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

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



AGENT CONNECT USER GUIDE

REVIEW & SUBMIT CHANGES

AGENT PROFILE CHANGES

REVIEW AND SUBMIT CHANGES

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

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

Review and Submit

1Agent Demographics

2Hierarchy Assignment

3W9

4Confirm Licenses

5Review and Submit

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

Process ID: Agent 360-SelfServ-

Agent Summary

Agent Name:

Company Name: N/A

FMO: WELLCARE FMO

Agent Producer ID:

Company Producer ID:

PM EFT Flag: 1

Hierarchy Summary

Your current/modified hierarchy information is below.

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

Producer Demographics

Please review the information below for accuracy.

Principal Information

Legal First Name:

Date of Birth:

SSN:

MI:

Email:

NPN:

Legal Last Name:

Nickname:

Address Information

Please verify your address information below before continuing.

Home Address

Business Address

Shipping Address

Address Line 1:

Address Line 1:

Address Line 1:

Address Line 2:

Address Line 2:

Address Line 2:

City:

City:

City:

State:

State:

State:

Zip Code:

Zip Code:

Zip Code:

Home Phone:

Business Phone:

Shipping Phone:

Home Cell:

Business Cell:

Shipping Cell:

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

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

Previous

Submit

CENTENE Corporation

Confidential and Proprietary Information

73


AGENT PROFILE CHANGES

CONFIRMATION PAGE

Confirmation - Any changes you made in Sections 1-4 will display.

A **case number** will be provided at the top right of the screen.

For further assistance, contact Broker Support and provide your case number.



Your Agent 360 case has been submitted. You can view your summary information on this page in addition to its current status.

Process ID:
Agent 360-SelfServ-1261

Application Information

Submission Date:Status:

Hierarchy Summary

Your current/modified hierarchy information is below.

Type	Status	Upline Producer ID	Upline Name	Upline Title	FMO Producer ID	FMO Name
Hierarchy Change	NEW			FMO		
Commission Assignment	CURRENT			PDCR	300014	WELLCARE FMO

Producer Demographics

Please review the information below for accuracy.

Principal Information

Legal First Name:MI:Legal Last Name:Date of Birth:Email:Michiedavila212@gmail.comSSN:NPN:Nickname:

Address Information

Please verify your address information below before continuing.

Home Address	Business Address	Shipping Address
Address Line 1: 123 JACKSON RD	Address Line 1: 123 JACKSON RD	Address Line 1: 1243 JACKSON RD
Address Line 2:	Address Line 2:	Address Line 2:
City: TAMPA	City: TAMPA	City: TAMPA
State: FL	State: FL	State: FL
Zip Code: 33615	Zip Code: 33615	Zip Code: 33615
Home Phone: 8135467894	Business Phone: 8135467894	Shipping Phone: 8135467894
Home Cell:	Business Cell:	Shipping Cell:

Signed W-9

W-9

Below is your signed W-9 document. Please download and save a copy for your records.

Signed W-9: Signed W-9



Questions?

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

Monday through Friday

8am to 8pm ET

- Or -

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