AGENT CONNECT USER GUIDE

2021

v3

AGENT CONNECT USER GUIDE

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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.

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AGENT CONNECT USER GUIDE

SINGLE SIGN-ON PORTAL (SSO)

Single Sign-On Portal (SSO)

OVERVIEW

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

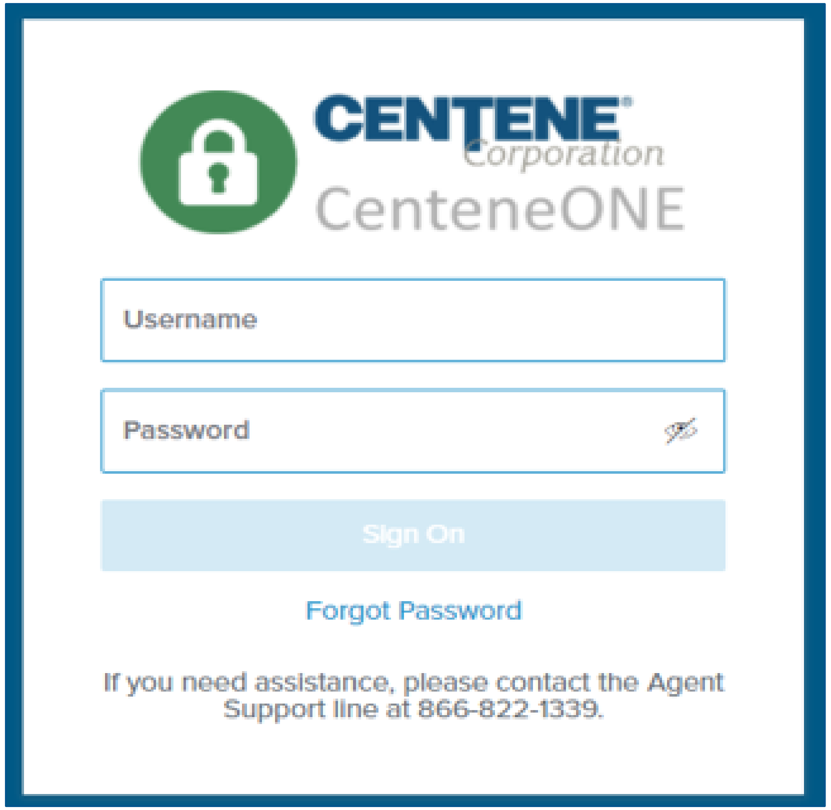
- You will receive an email similar to this with the **Subject:** Centene: Complete Your PingOne Single Sign-On Registration
- The email will include your SSO portal username (which is your **NPN**) and a temporary password
- By selecting **the URL link provided,** you can begin the process of setting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

> **From:** <IdentityAccessManager@Wellcare.com>
> **Subject: Centene: Complete Your PingOne Single Sign-On Registration**
> **Date:** April 27, 2021 at 10:33:52 AM EDT
>
> This email is your official invitation to begin using the PingOne Single Sign-On Portal. Please access the URL below and utilize the following login credentials to complete registration:
>
> Username : 100001
> Password : $password
>
> Portal Url : https://desktop.pingone.com/cnc-callidus-brk
>
> Thank you for your partnership.
>
> This is an auto-generated email – please do not reply.

Single Sign-On Portal (SSO)

SETTING UP YOUR SINGLE SIGN-ON PORTAL

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



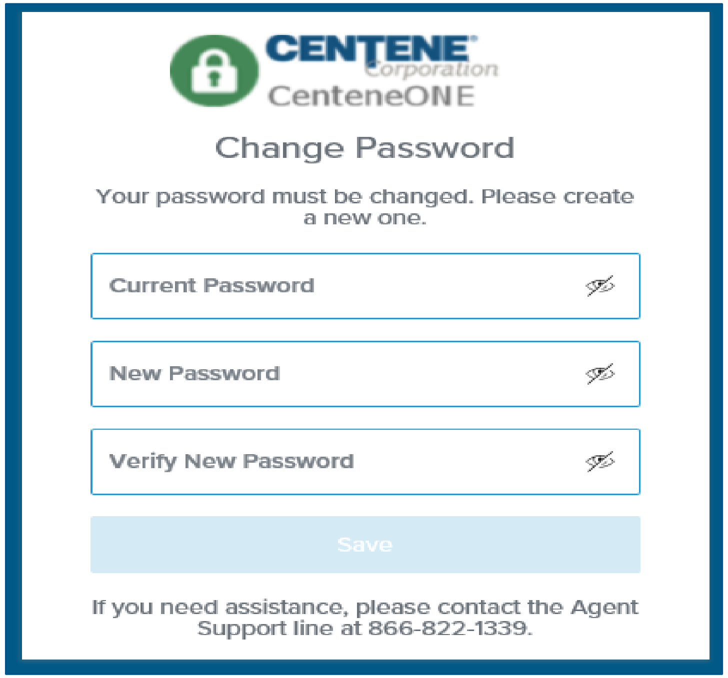
If you did not receive the introductory email with log-in credentials, select the following link (or copy / paste it to your internet browser), and use the instructions in the ***FORGOTTEN PASSWORD / PASSWORD RESET*** *section of this presentation to complete portal set up.*

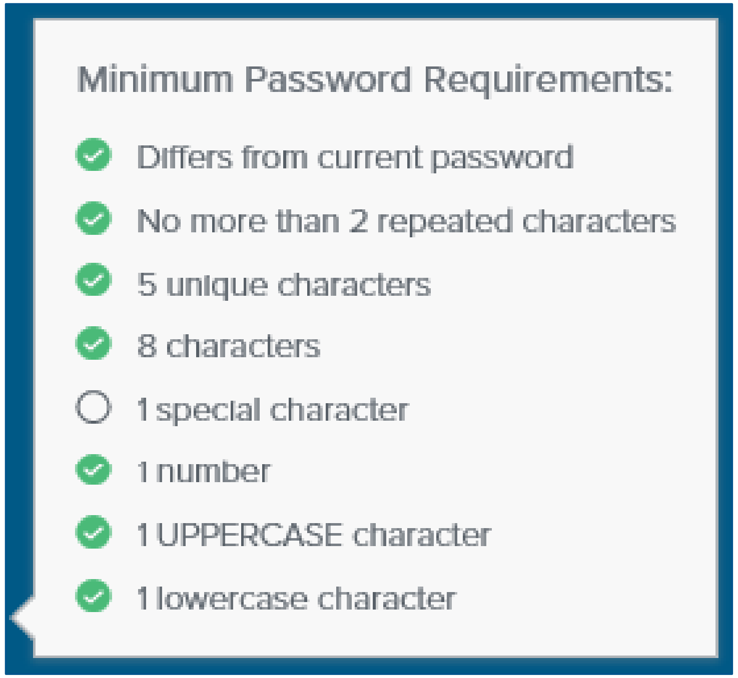
https://desktop.pingone.com/cnc-callidus-brk

Single Sign-On Portal (SSO)

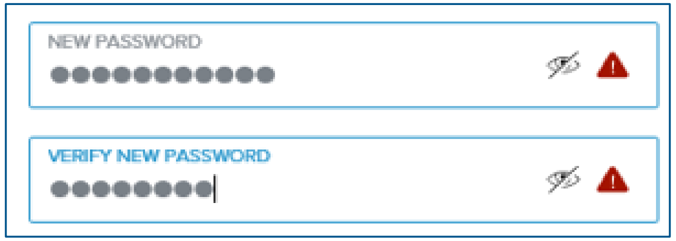
SETTING UP YOUR SINGLE SIGN-ON PORTAL

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





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

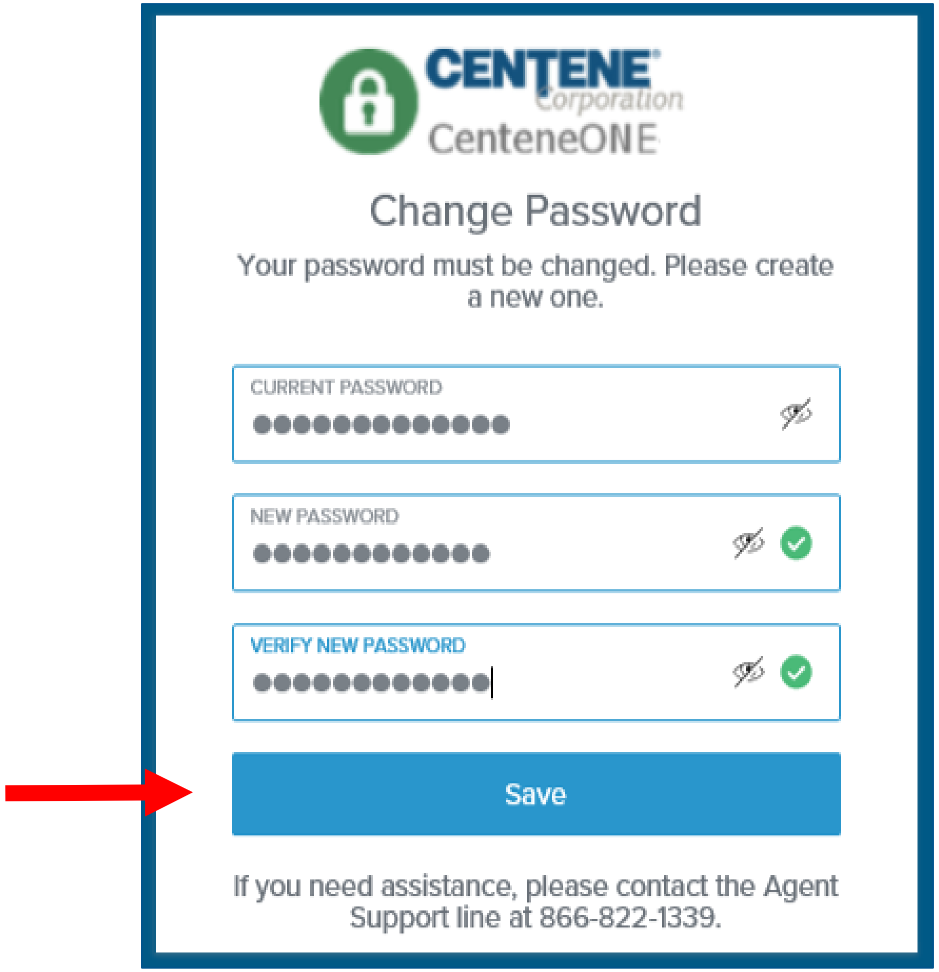


Single Sign-On Portal (SSO)

SETTING UP YOUR SINGLE SIGN-ON PORTAL

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

Select the **Save** button.

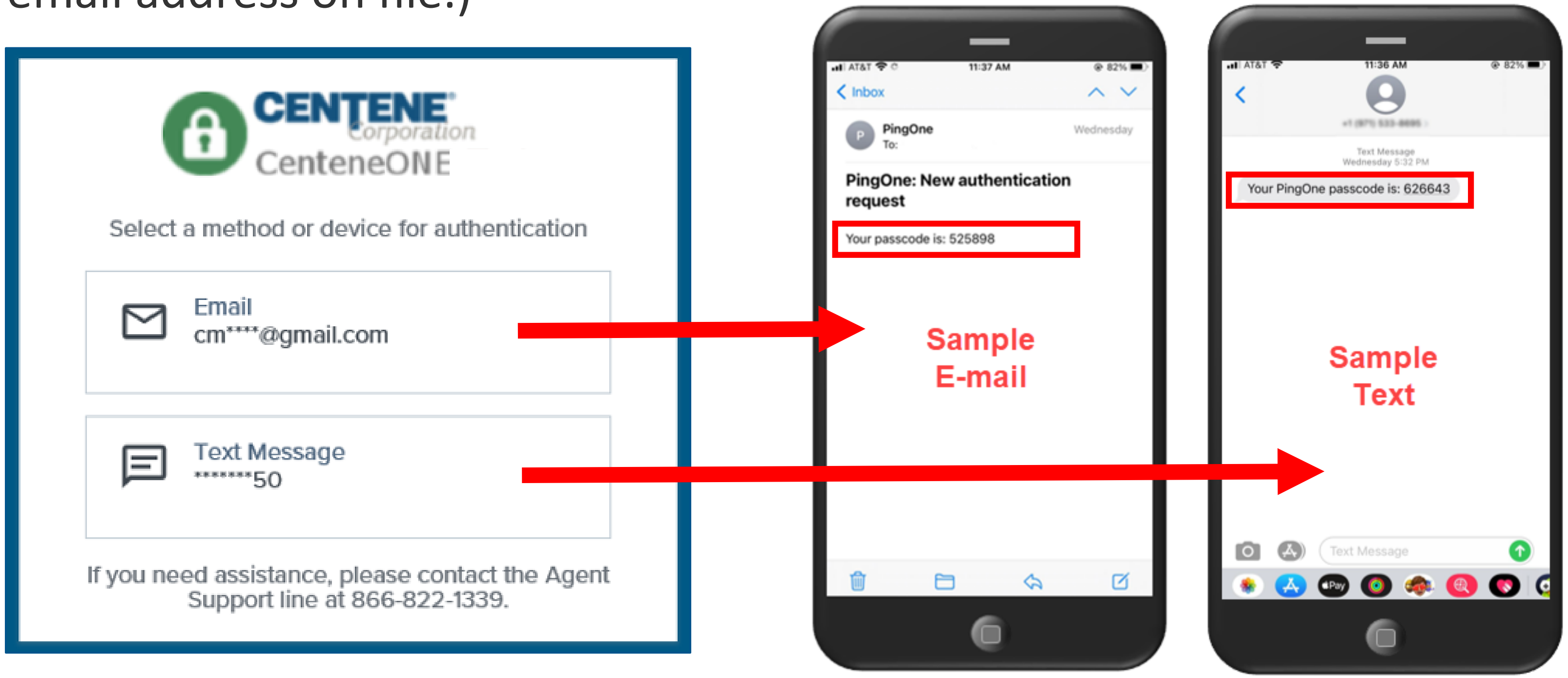


Single Sign-On Portal (SSO)

SETTING UP YOUR SINGLE SIGN-ON PORTAL

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

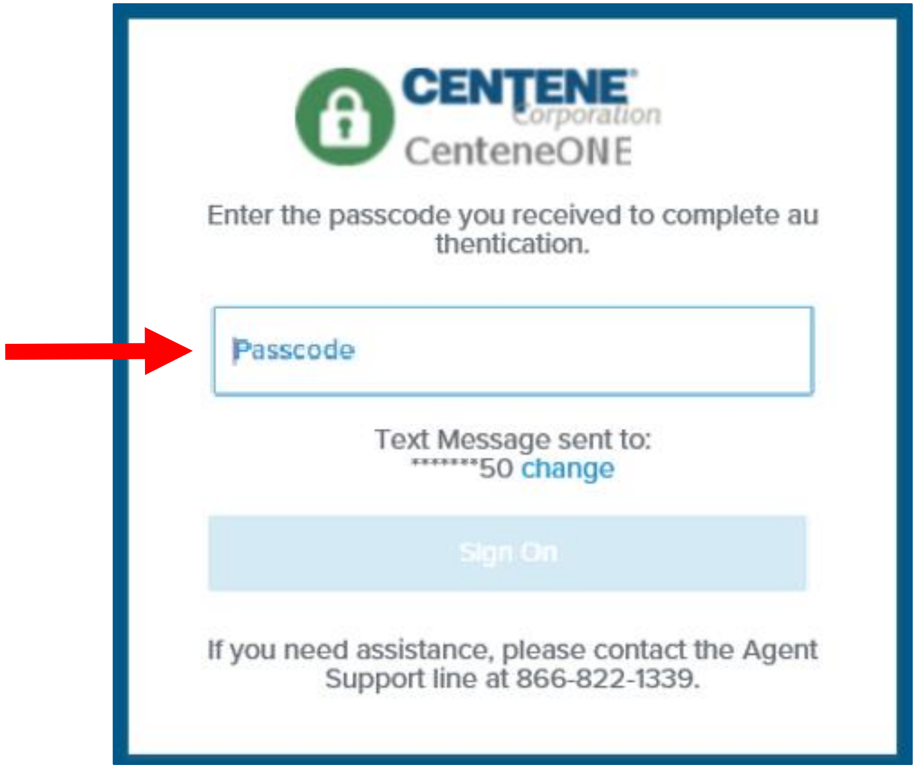
Select the **Email** option or the **Text Message** option, based on your preference. (Selecting **Text Message** will text an authentication code to the cell phone number on file. Selecting **Email** will email the code to the email address on file.)



Single Sign-On Portal (SSO)

SETTING UP YOUR SINGLE SIGN-ON PORTAL

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



Single Sign-On Portal (SSO)

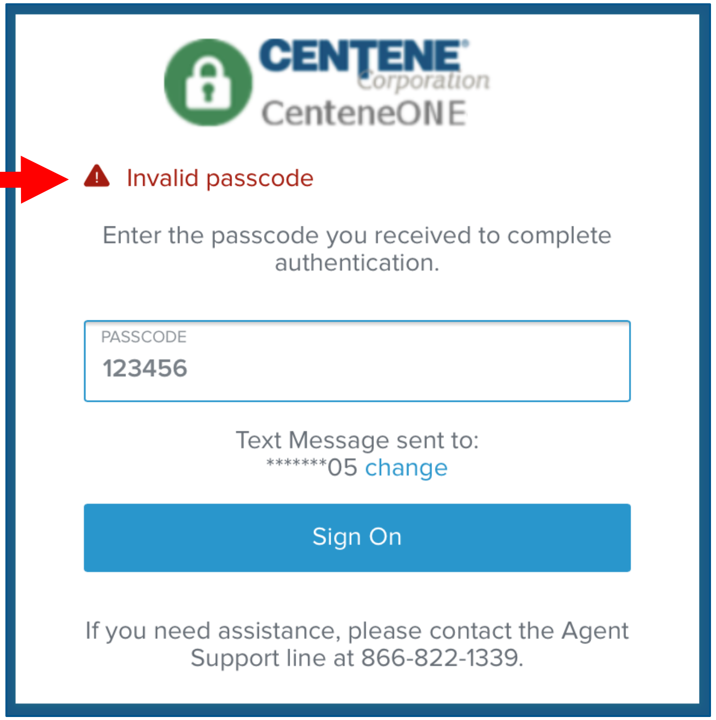
SETTING UP YOUR SINGLE SIGN-ON PORTAL

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

Select the **Sign On** button.

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

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



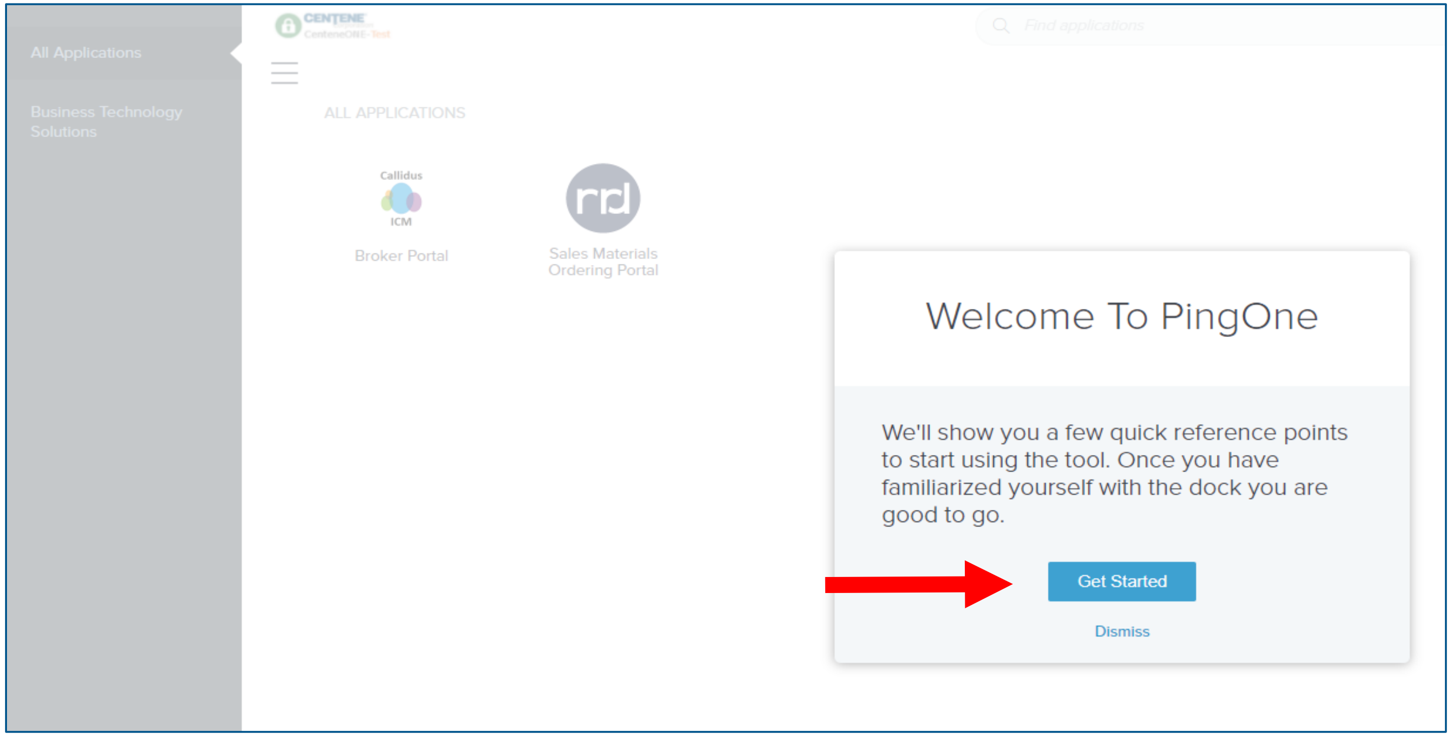
Single Sign-On Portal (SSO)

NAVIGATING IN YOUR SINGLE SIGN-ON PORTAL

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

Select the **Get Started** button.

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



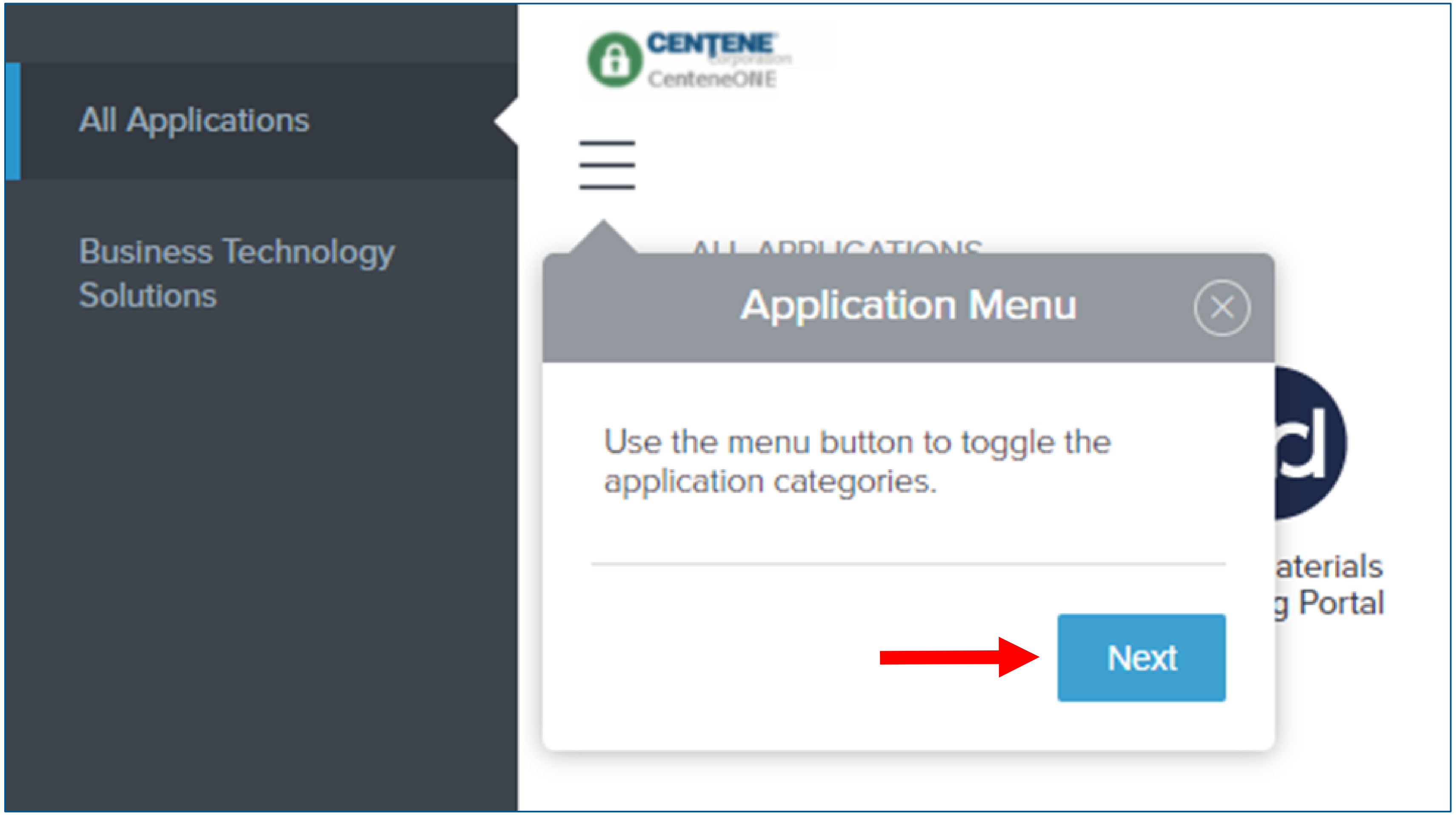
Single Sign-On Portal (SSO)

NAVIGATING IN YOUR SINGLE SIGN-ON PORTAL

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

It will allow you to toggle the application categories.

Select the **Next** button.



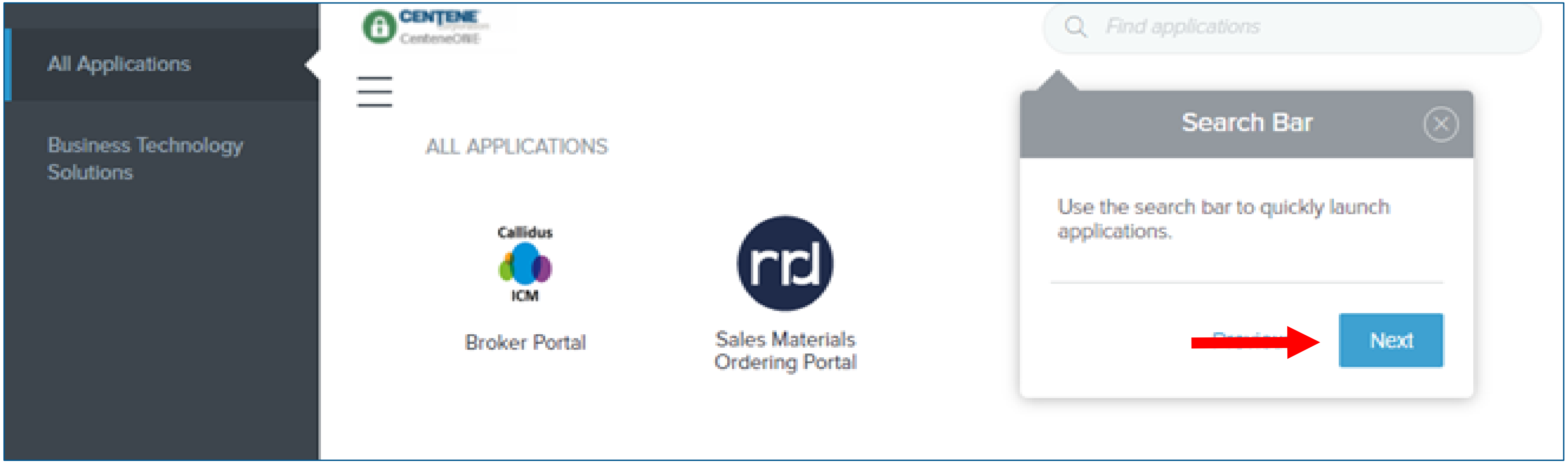
Single Sign-On Portal (SSO)

NAVIGATING IN YOUR SINGLE SIGN-ON PORTAL

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

Use it to search for and quickly launch applications.

Select the **Next** button.



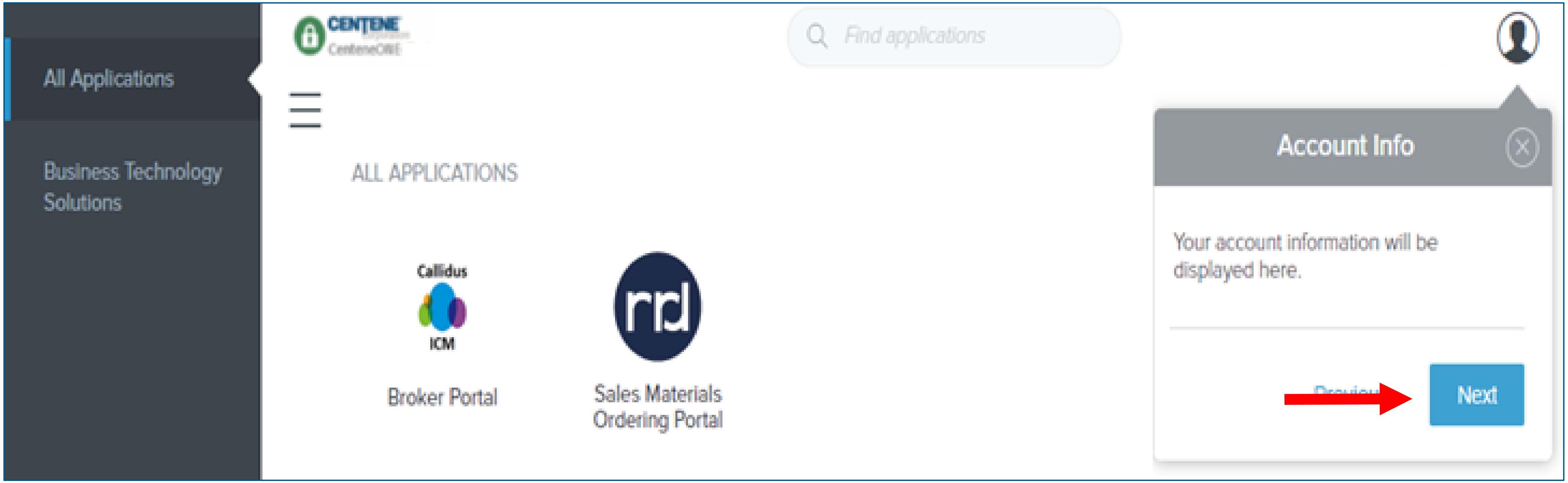
Single Sign-On Portal (SSO)

NAVIGATING IN YOUR SINGLE SIGN-ON PORTAL

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

Account information is accessed here.

Select the **Next** button.



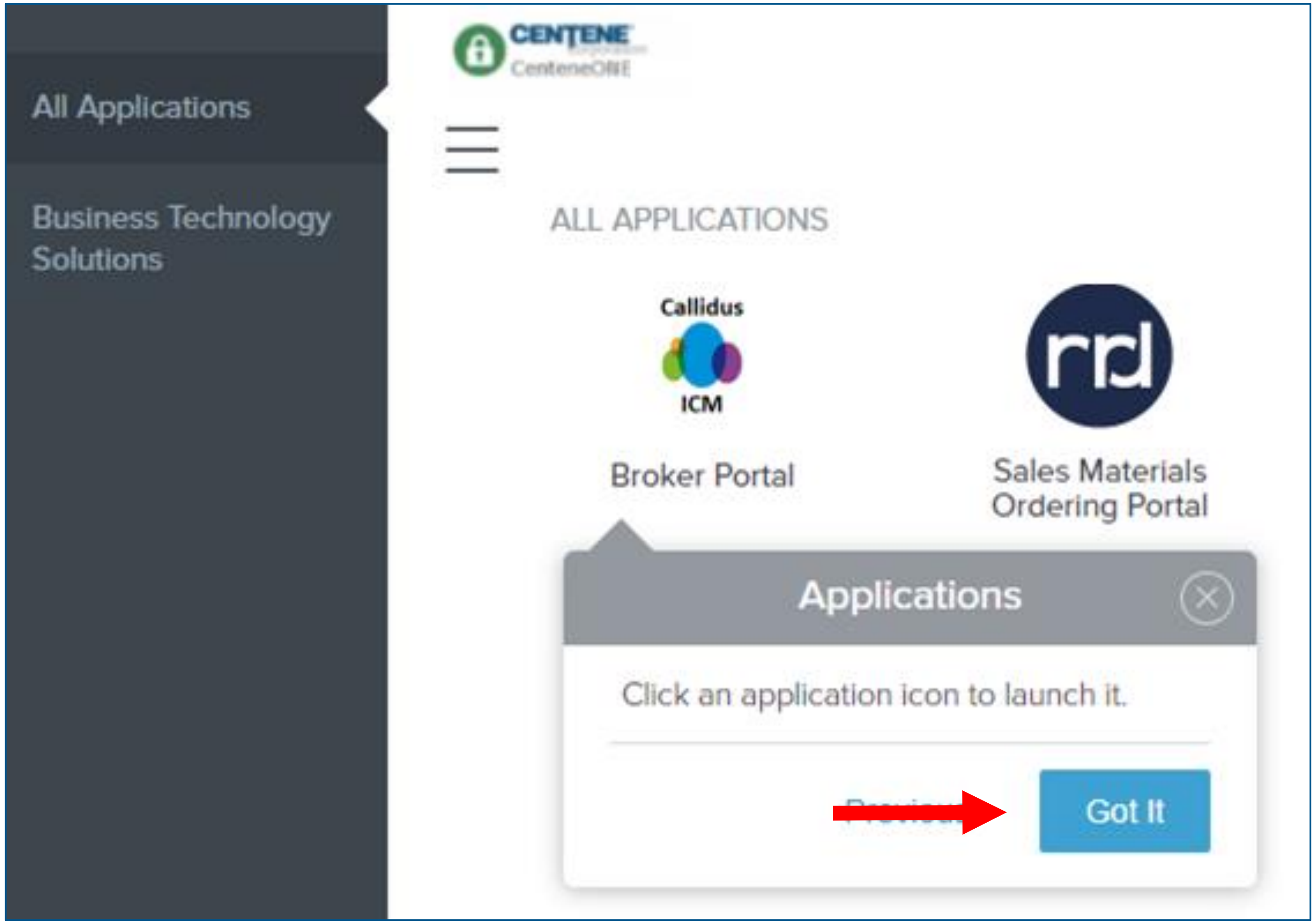
Single Sign-On Portal (SSO)

NAVIGATING IN YOUR SINGLE SIGN-ON PORTAL

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

Applications can be launched by selecting their icons.

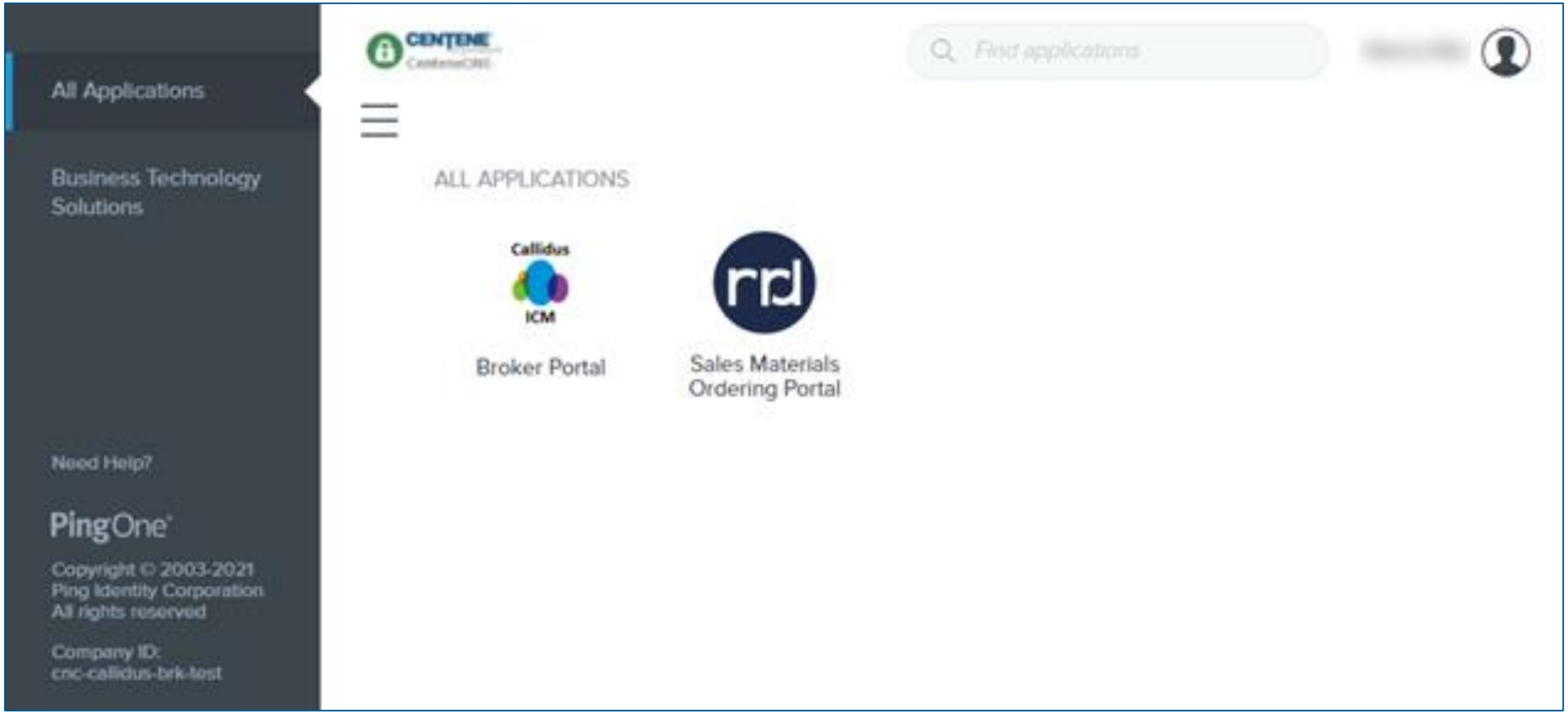
Select the **Got It** button to proceed.



Single Sign-On Portal (SSO)

NAVIGATING IN YOUR SINGLE SIGN-ON PORTAL

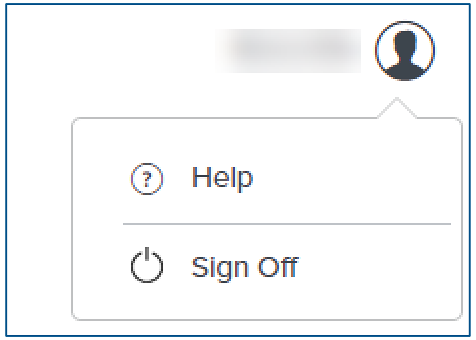
The Single Sign-On Portal is ready for use. Explore and access applications like Agent Connect (Broker Portal) and Custom Point (Sales Materials Ordering Portal) to leverage the tools and support you need.



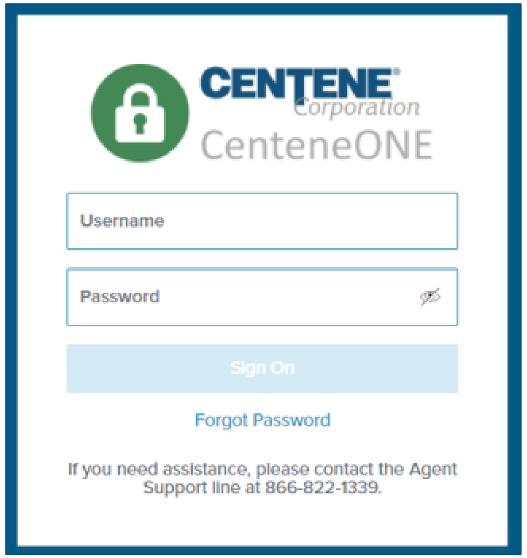
Single Sign-On Portal (SSO)

NAVIGATING IN YOUR SINGLE SIGN-ON PORTAL

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



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



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

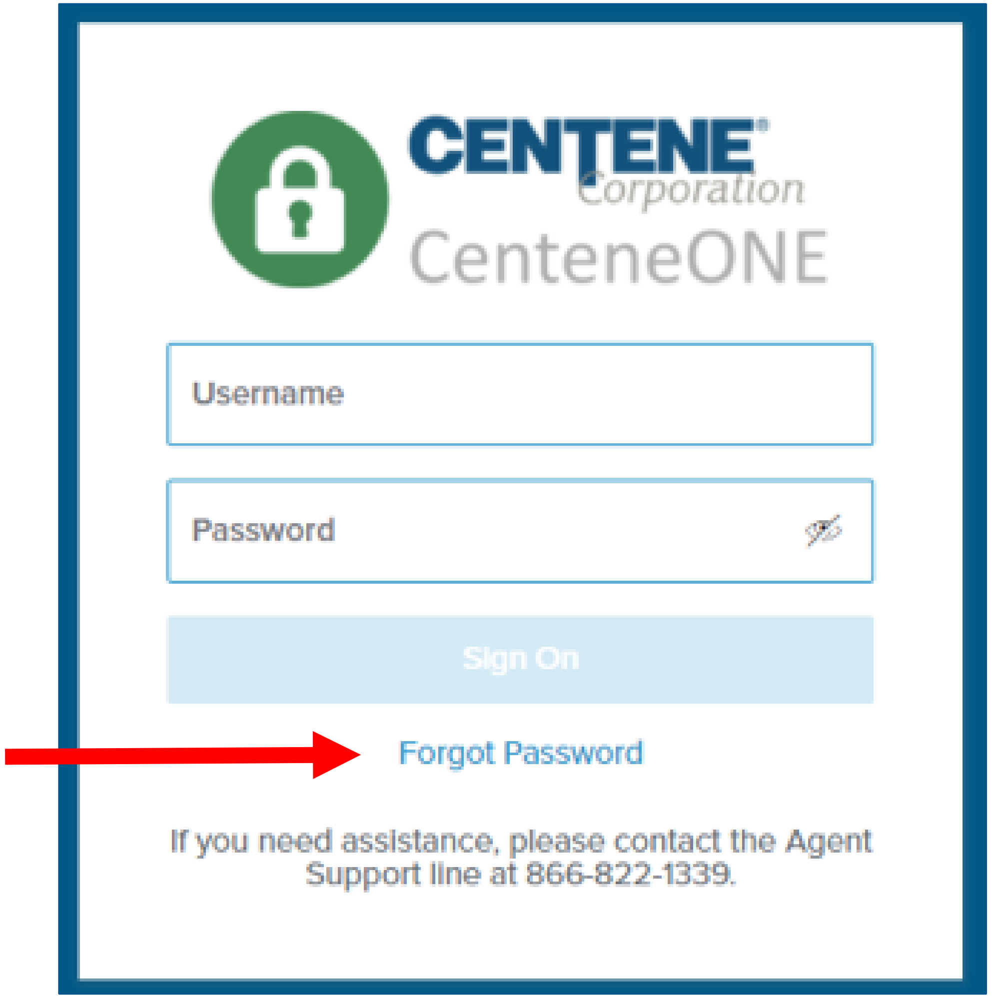
Single Sign-On Portal (SSO)

FORGOTTEN PASSWORD / PASSWORD RESET

Step 1: If you have:

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

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

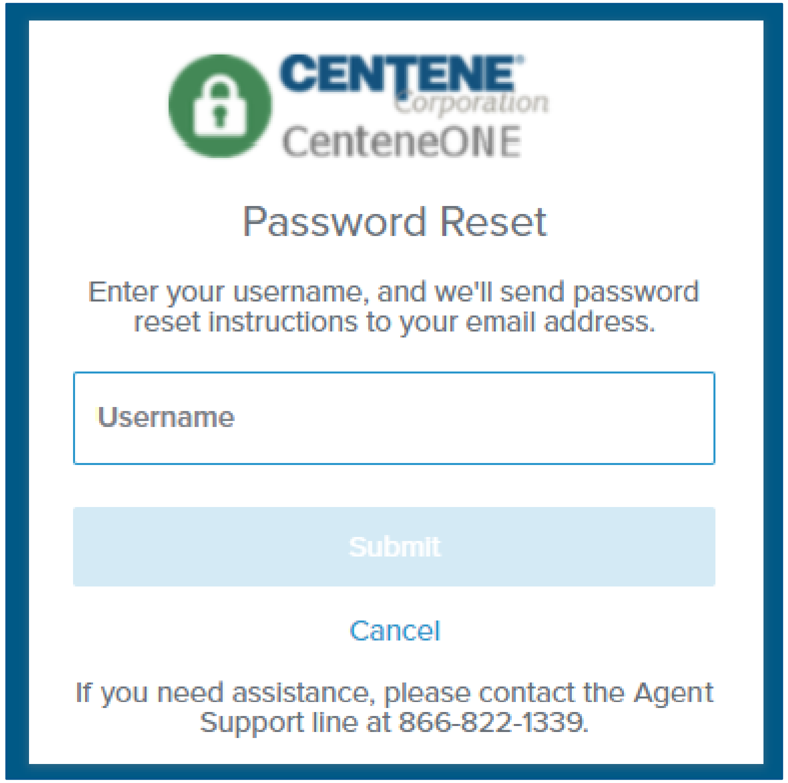


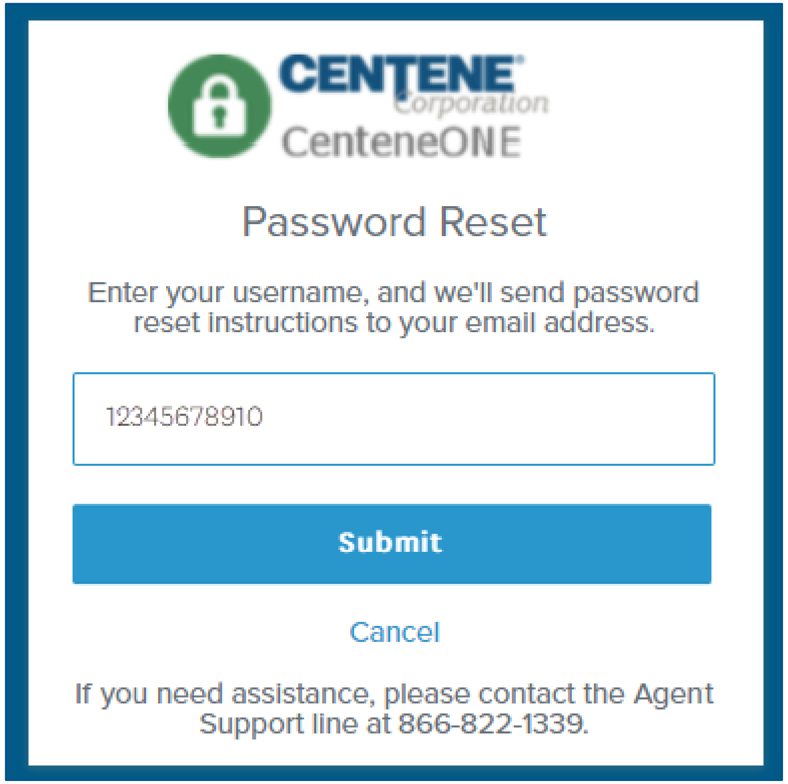
Single Sign-On Portal (SSO)

FORGOTTEN PASSWORD / PASSWORD RESET

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

Select the **Submit** button.





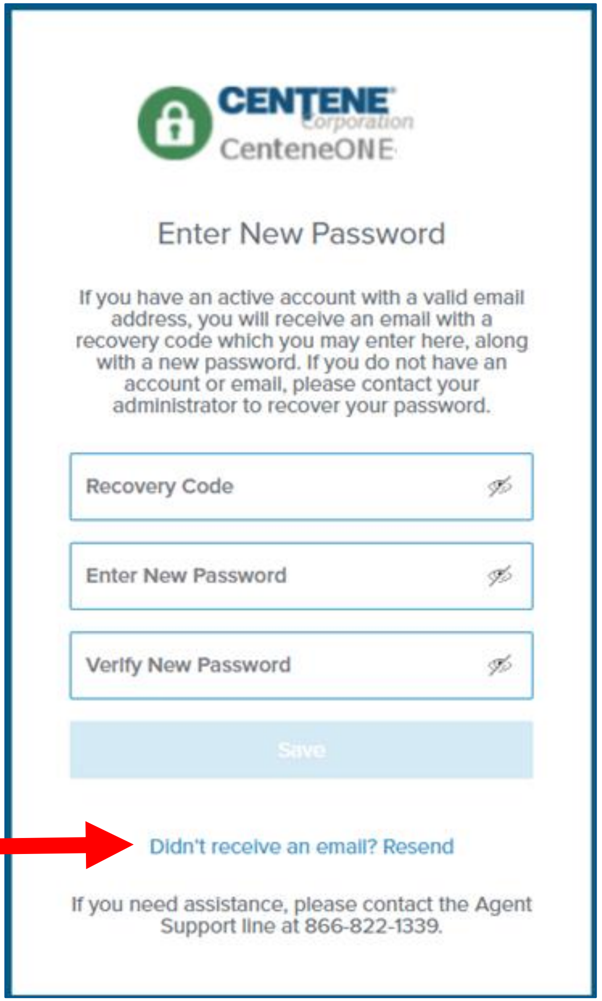
Single Sign-On Portal (SSO)

FORGOTTEN PASSWORD / PASSWORD RESET

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

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

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



Single Sign-On Portal (SSO)

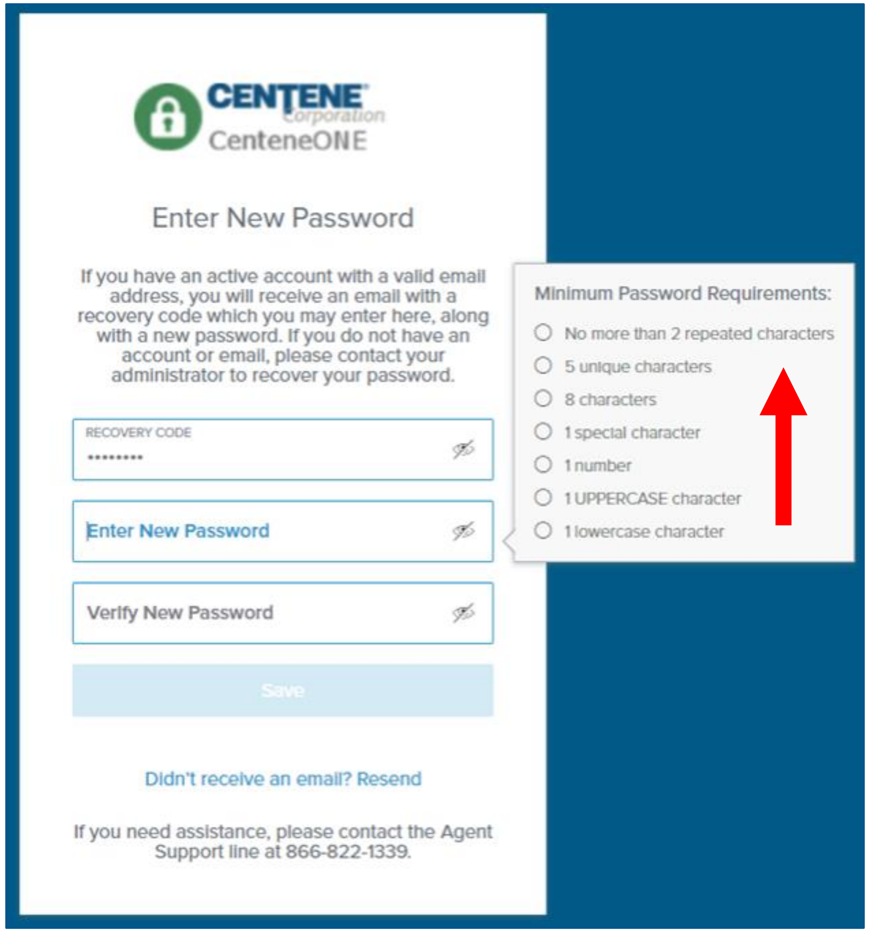
FORGOTTEN PASSWORD / PASSWORD RESET

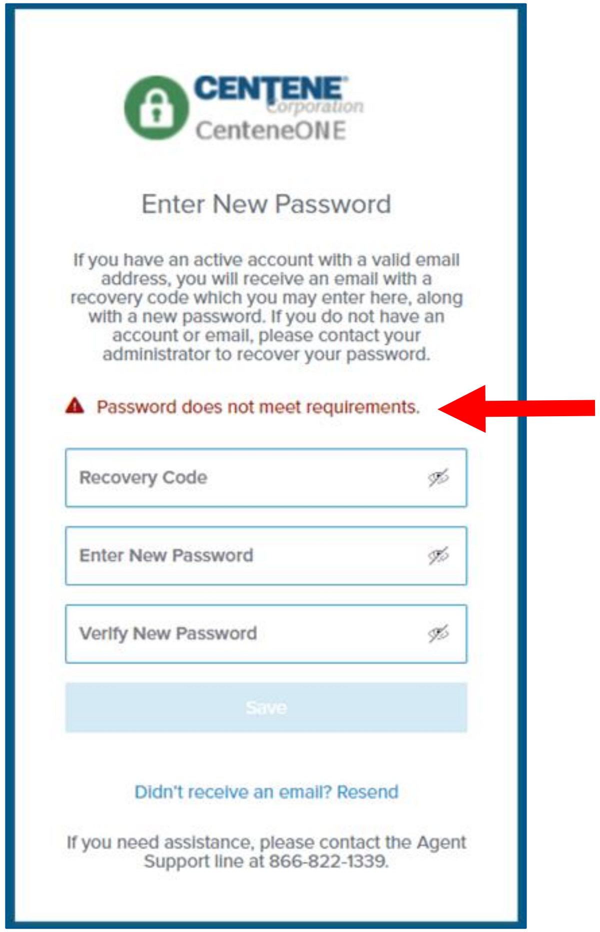
Step 4: Enter the password reset code from the email in the **Recovery Code** field.

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

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

Adjust your new password to meet the requirements.

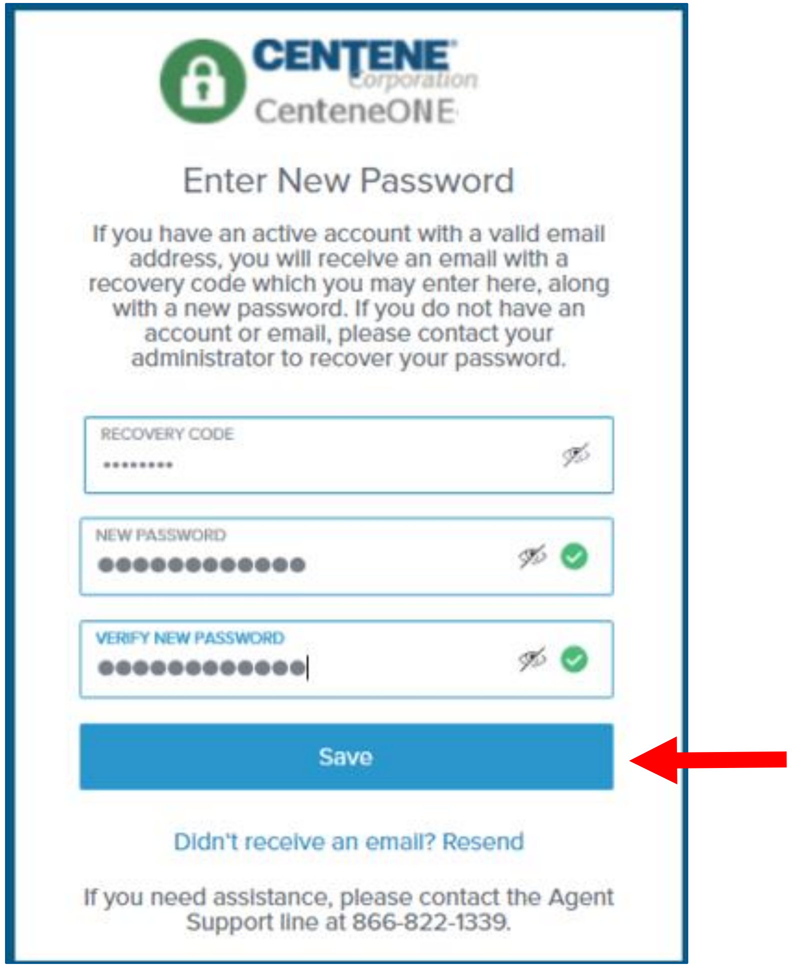




Single Sign-On Portal (SSO)

FORGOTTEN PASSWORD / PASSWORD RESET

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

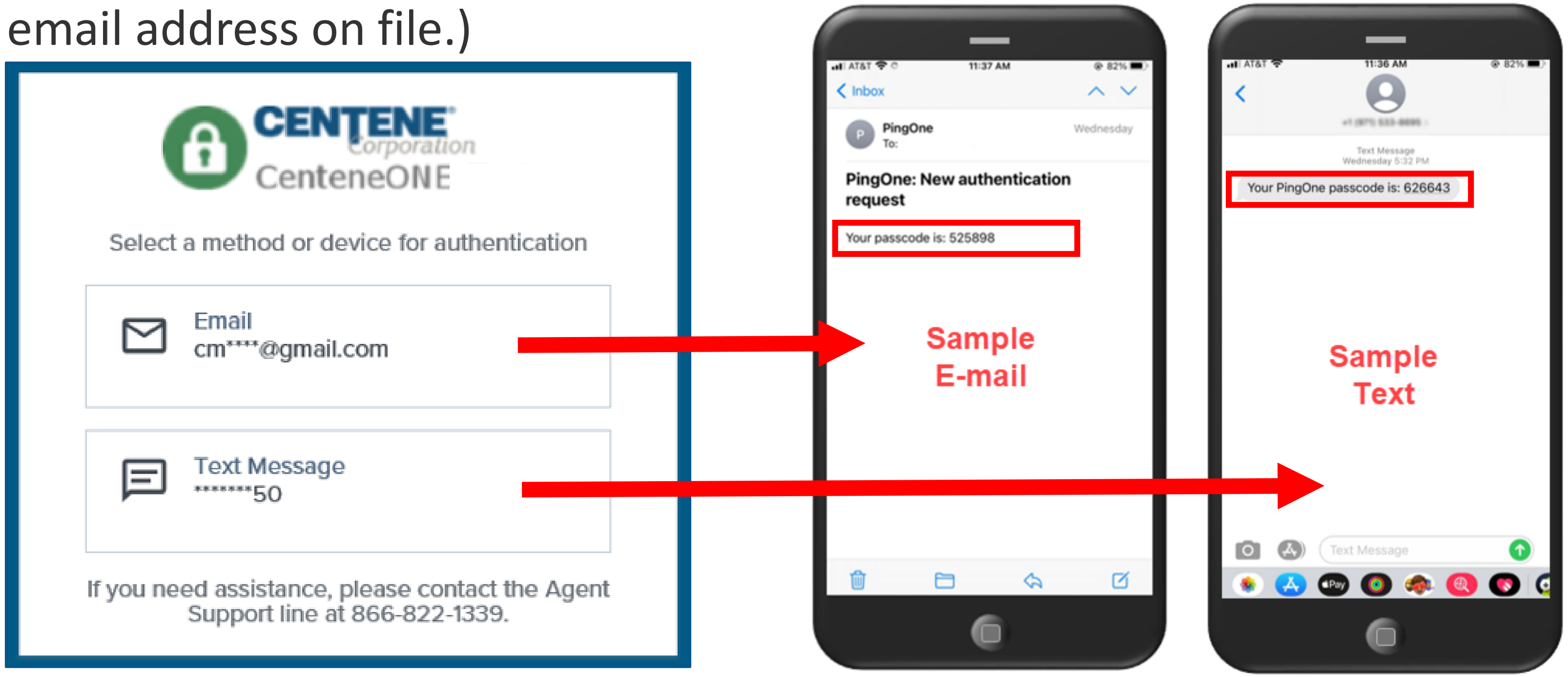


Single Sign-On Portal (SSO)

FORGOTTEN PASSWORD / PASSWORD RESET

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

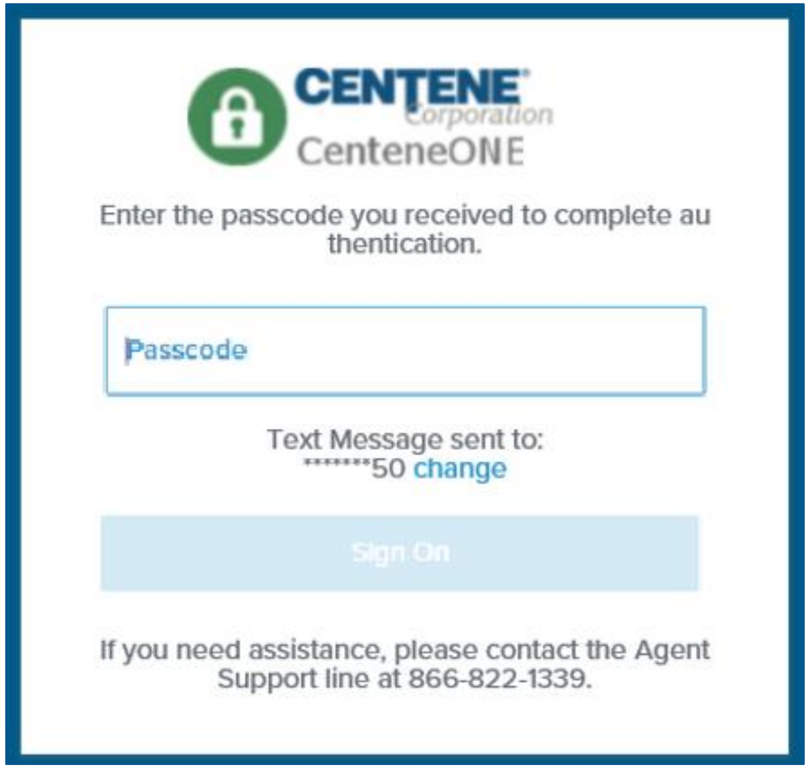
Select the **Email** option or the **Text Message** option, based on your preference. (Selecting **Text Message** will text an authentication code to the cell phone number on file. Selecting **Email** will email the code to the email address on file.)



Single Sign-On Portal (SSO)

FORGOTTEN PASSWORD / PASSWORD RESET

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



Single Sign-On Portal (SSO)

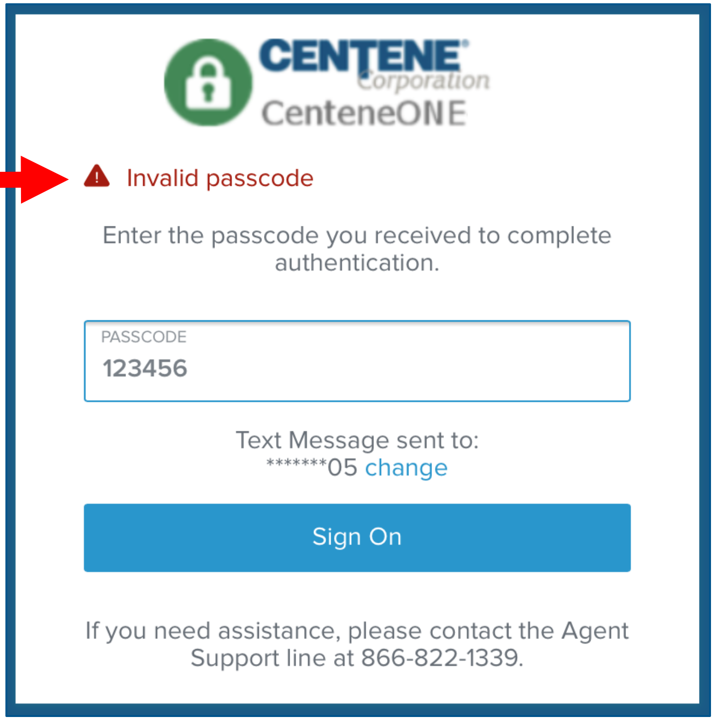
FORGOTTEN PASSWORD / PASSWORD RESET

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

Select the **Sign On** button.

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

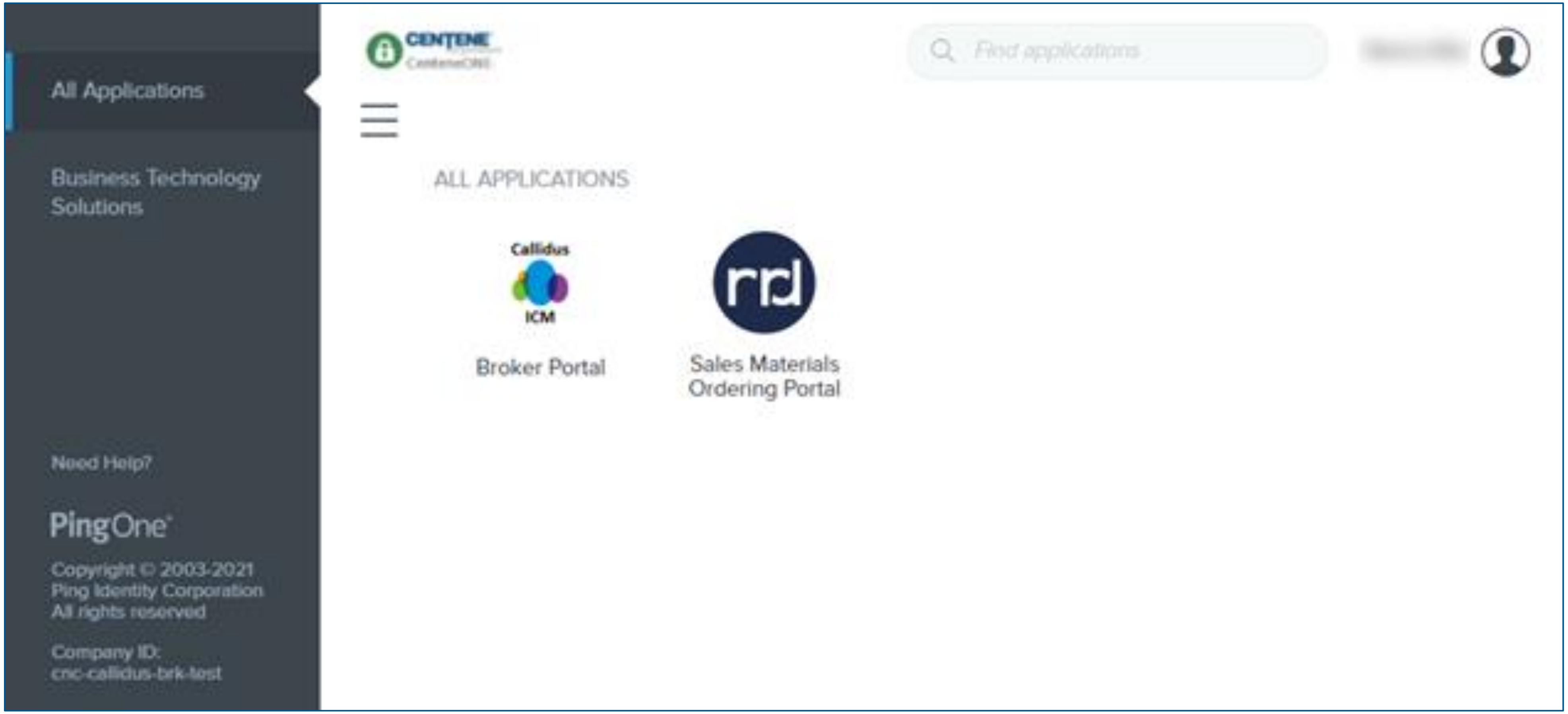
*Correct the code, and select the **Sign On** button.)*



Single Sign-On Portal (SSO)

FORGOTTEN PASSWORD / PASSWORD RESET

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



Single Sign-On Portal (SSO)

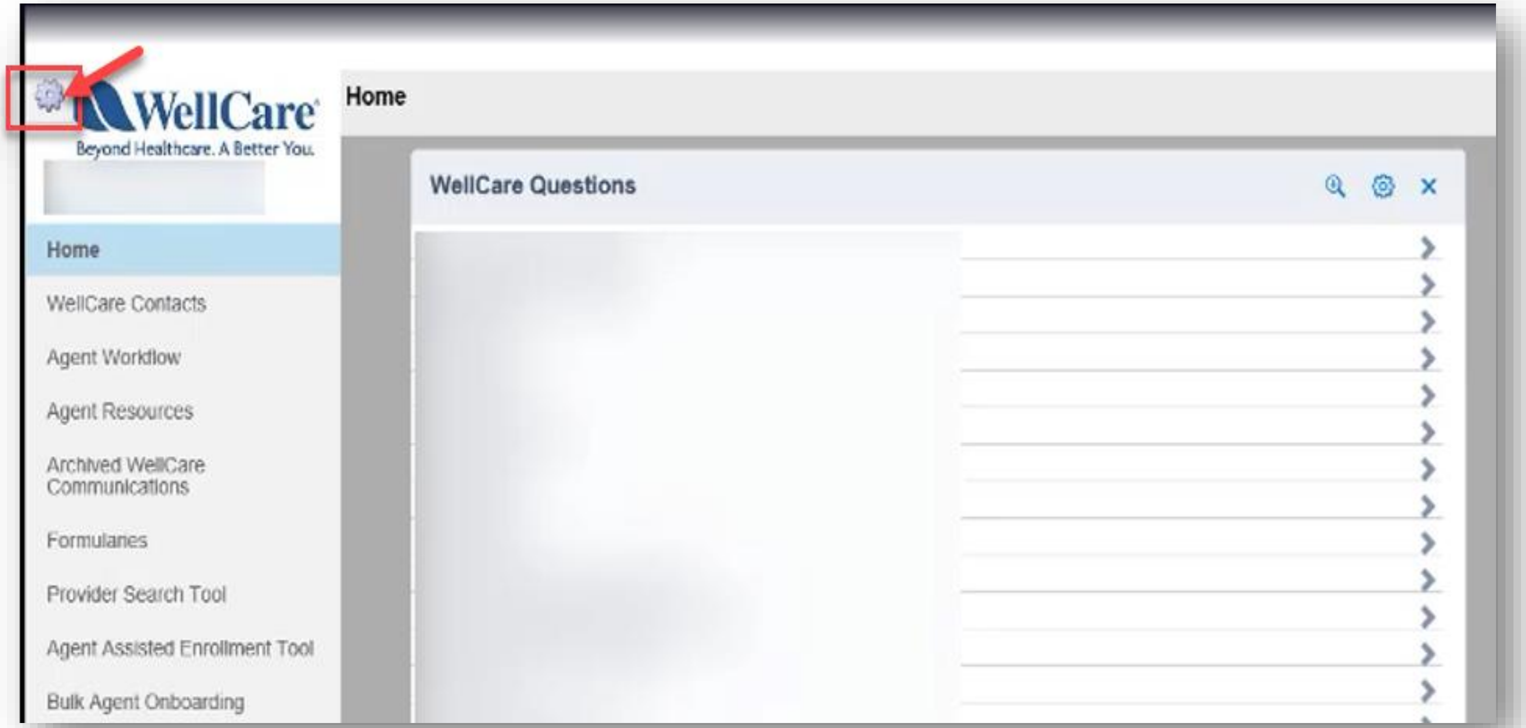
AGENT CONNECT LOGIN & SWITCH CAPABILITY TO VIEW AS AGENCY PRINCIPAL

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



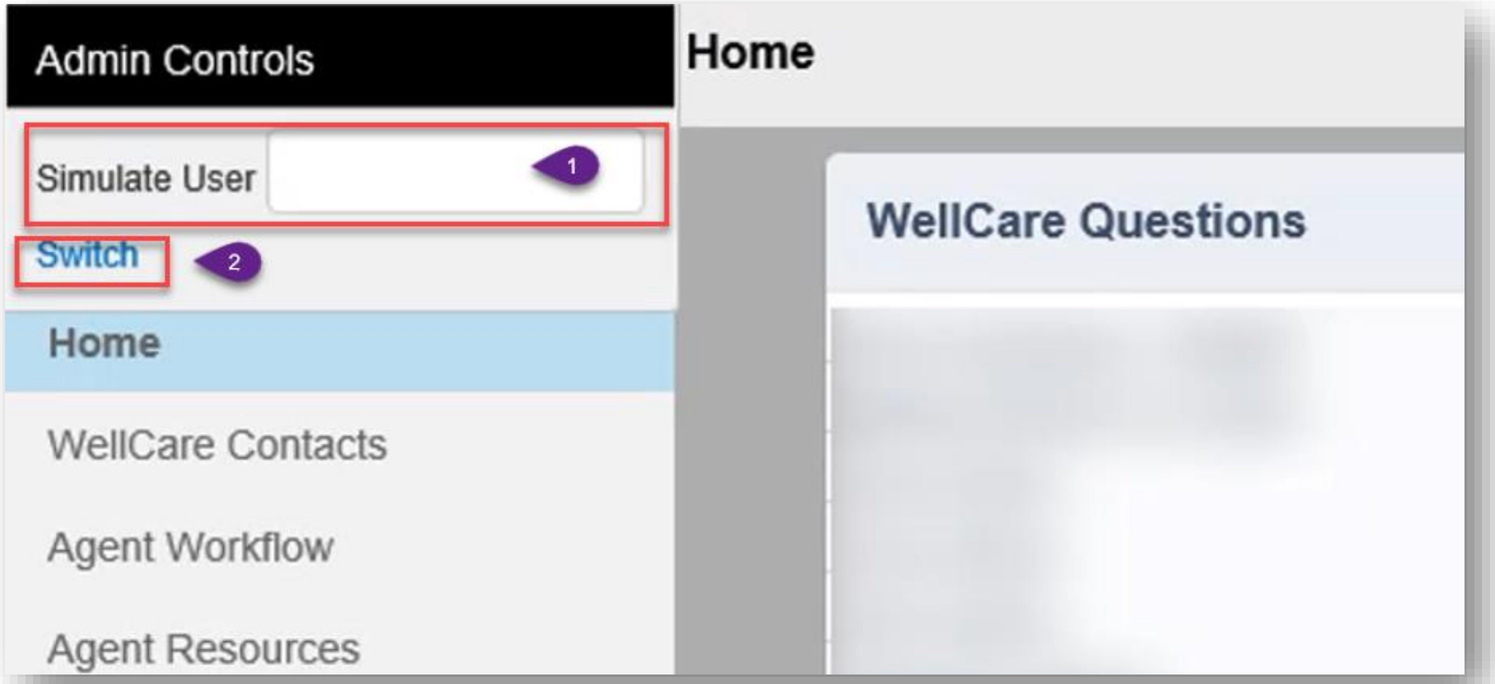
Single Sign-On Portal (SSO)

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.

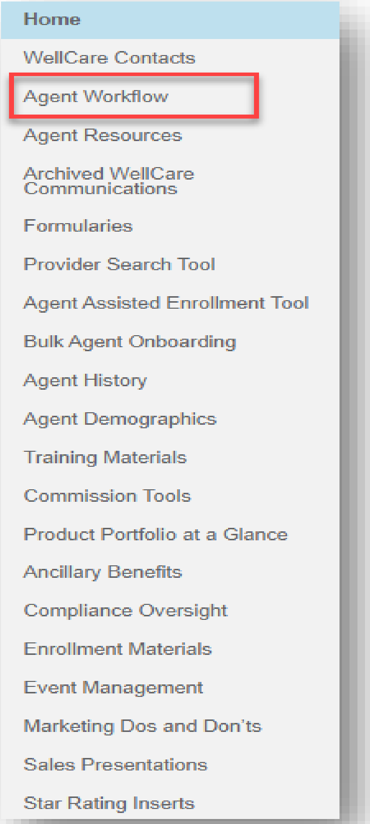


Single Sign-On Portal (SSO)

LOGIN TO AGENT WORKFLOW

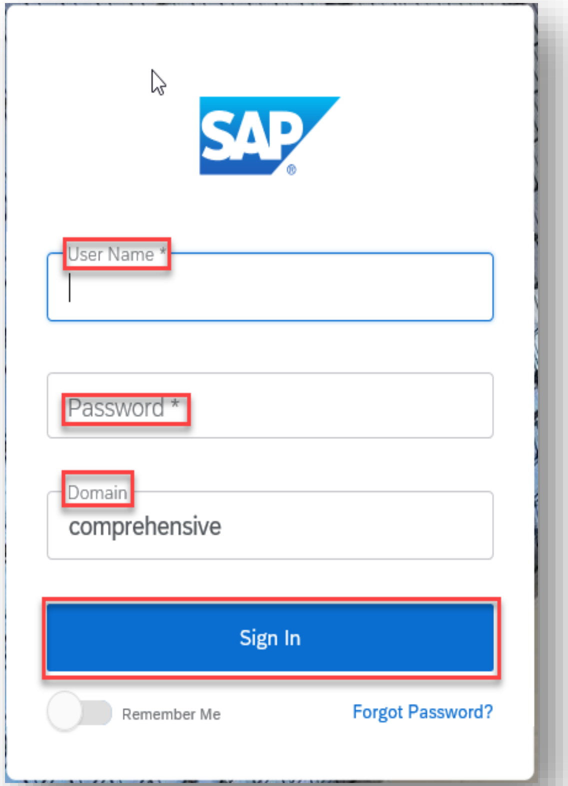
Login to Agent Workflow from your portal homepage with your Login name (email) and initial temporary password to make changes to your broker profile.

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.**

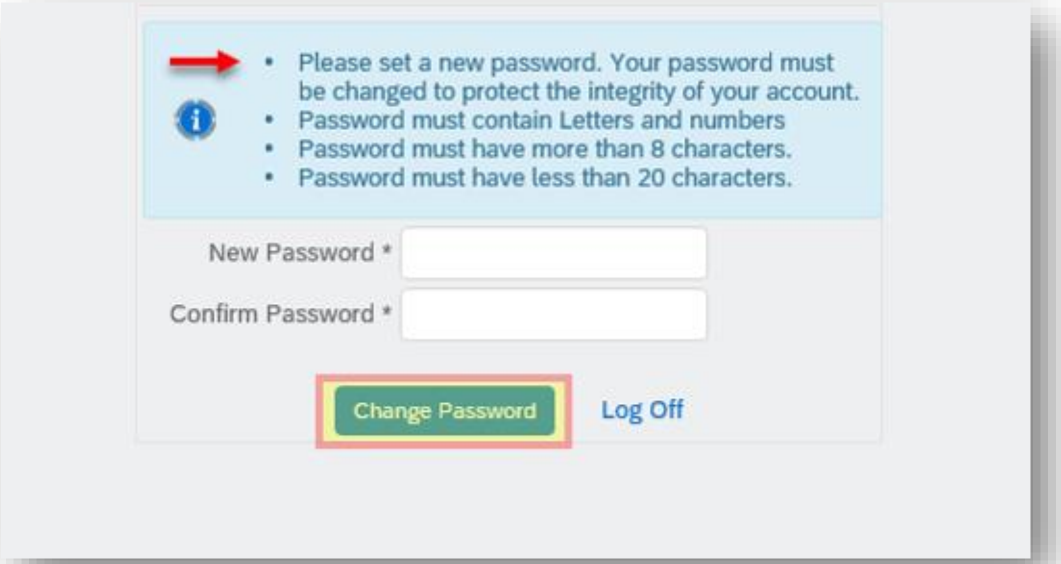
NOTE: Domain name is **COMPREHENSIVE**



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.



AGENT CONNECT USER GUIDE

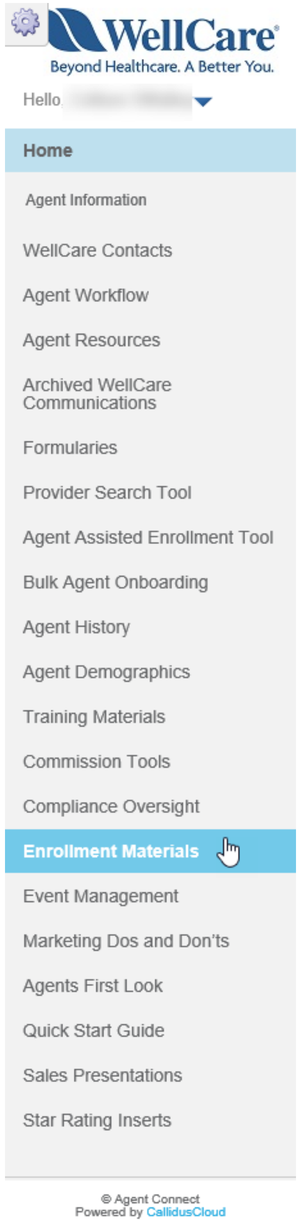
AGENT MATERIALS

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:

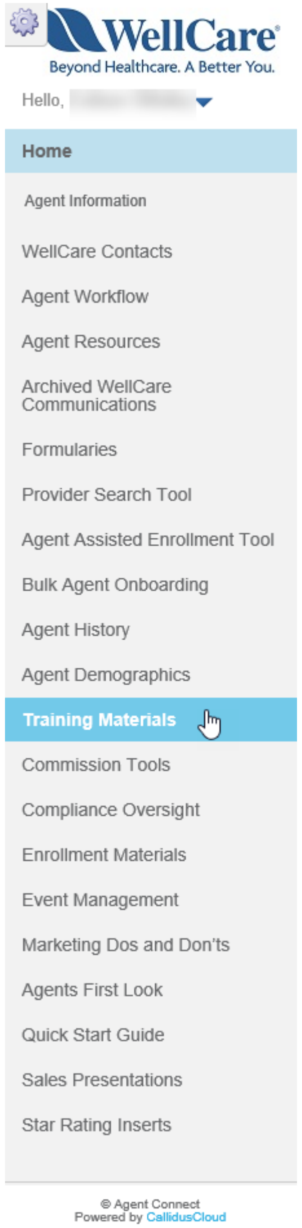
- MA/MAPD & PDP Paper Enrollment Applications
- SOA Form
- DocuSign various Enrollment Applications & SOA forms
- Summary of Benefits
- Enrollment Resource Guide
- CSNP Form (English, Korean, Spanish)
- And more!

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!

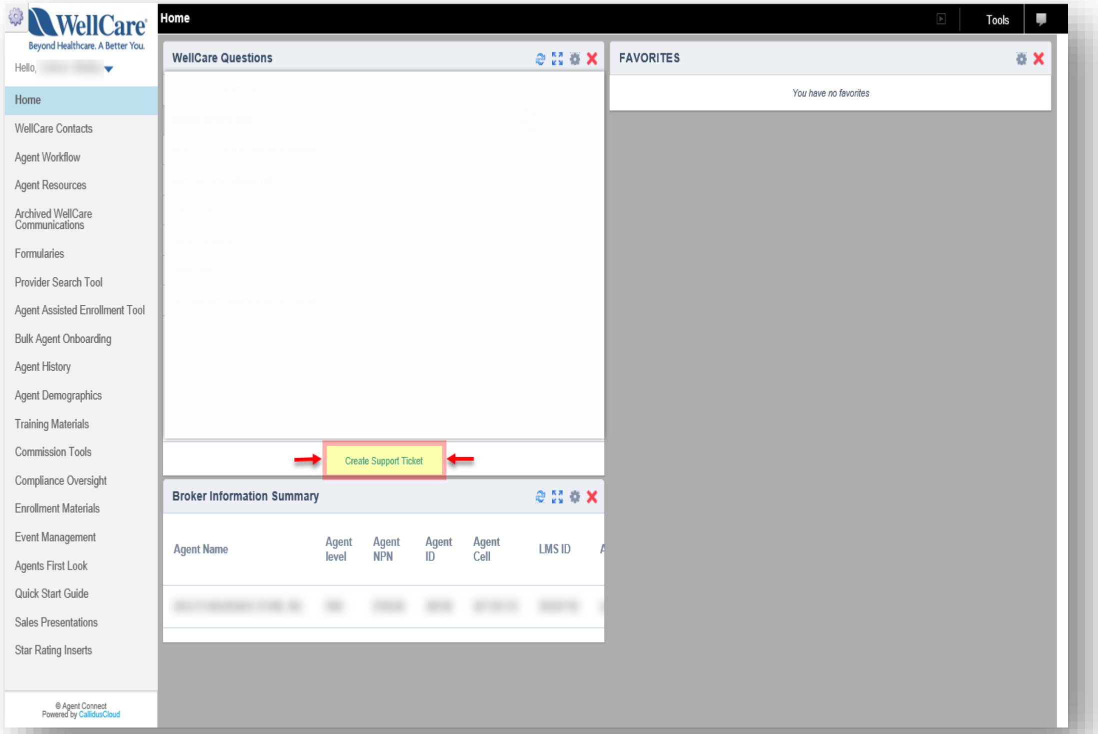
AGENT CONNECT USER GUIDE

CREATING SUPPORT TICKETS

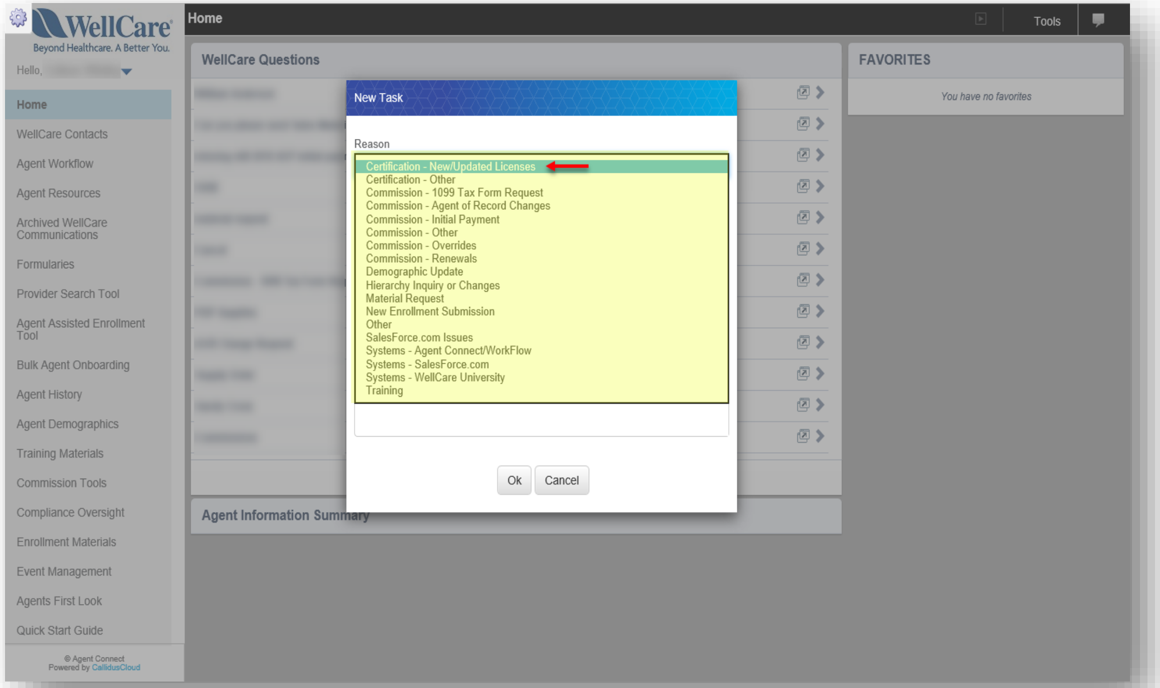
CREATING SUPPORT TICKETS

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**.



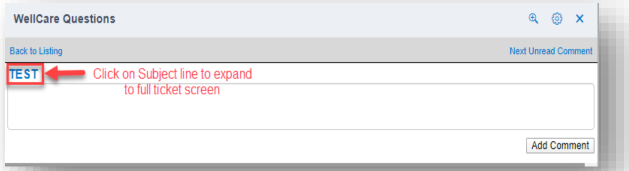
CREATING SUPPORT TICKETS

CREATING SUPPORT TICKET IN AGENT CONNECT PORTAL

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

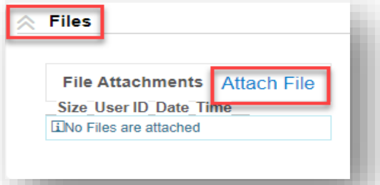
Step 1: Click the **boxed arrow** symbol to the right of the subject line, after you have submitted the ticket

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



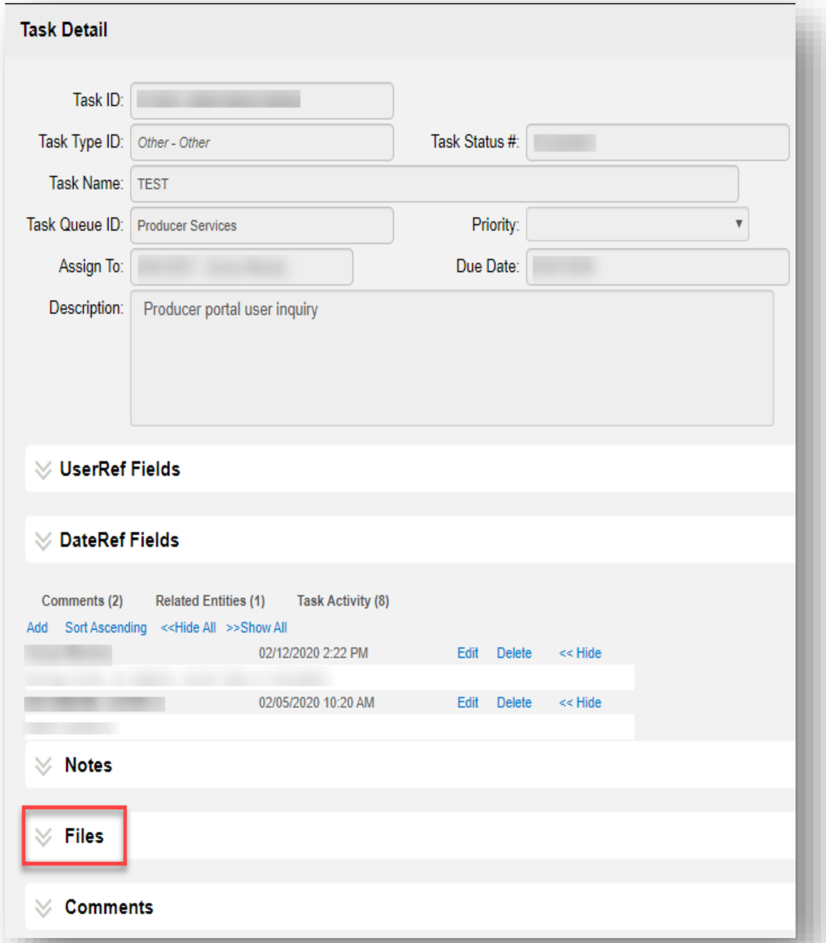
Step 3: A new window with your previously submitted ticket will open. Scroll to the bottom of the window, and click the arrows to the left of the word **Files**

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**

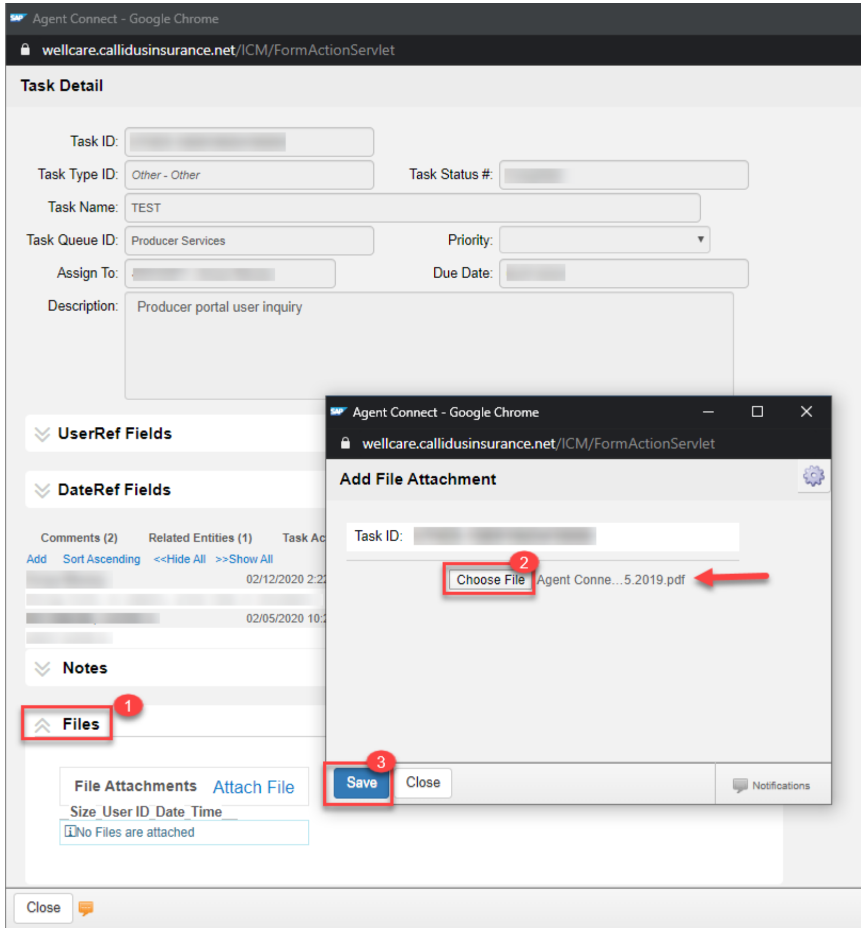


CREATING SUPPORT TICKETS

ATTACHING FILE TO SUPPORT TICKET

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

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

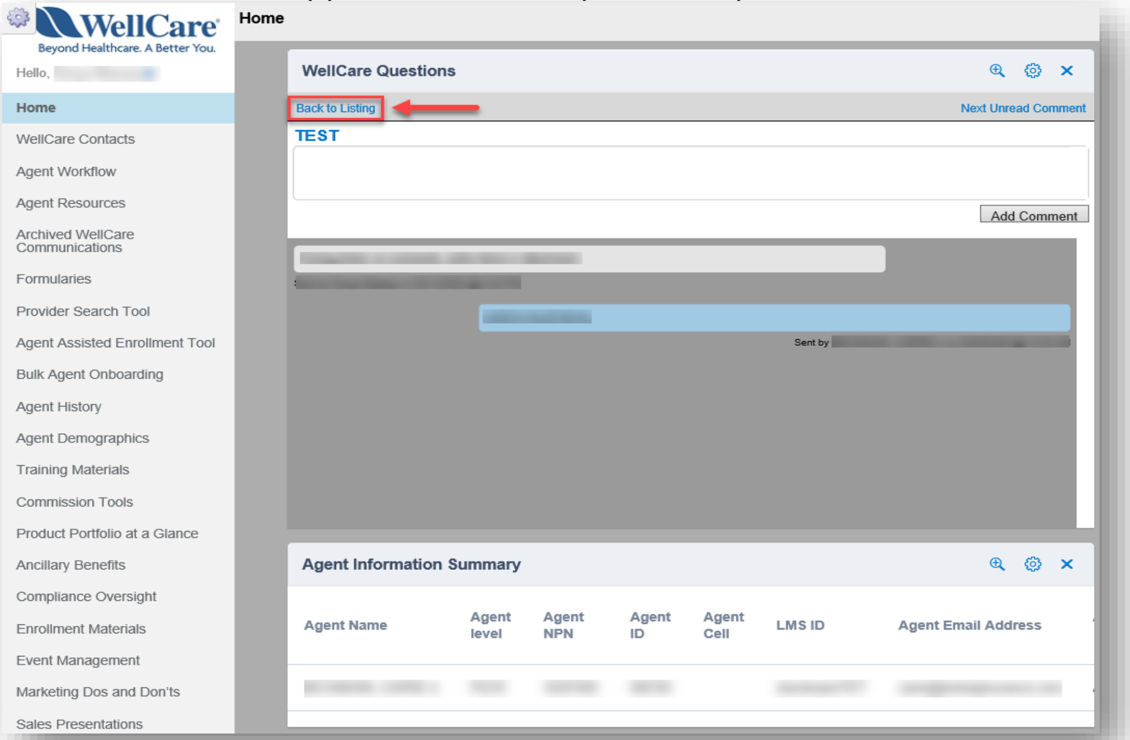


CREATING SUPPORT TICKETS

MONITORING SALES SUPPORT RESPONSE TO YOUR TICKET

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



CENTENE Corporation

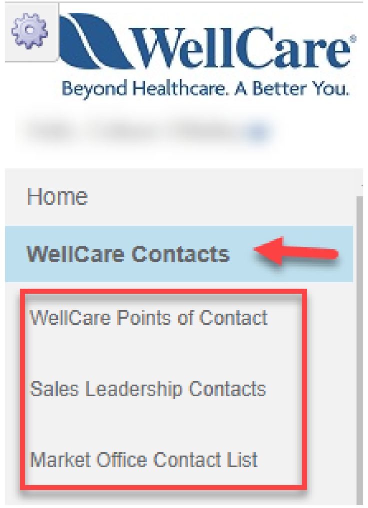
AGENT CONNECT USER GUIDE

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.



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**

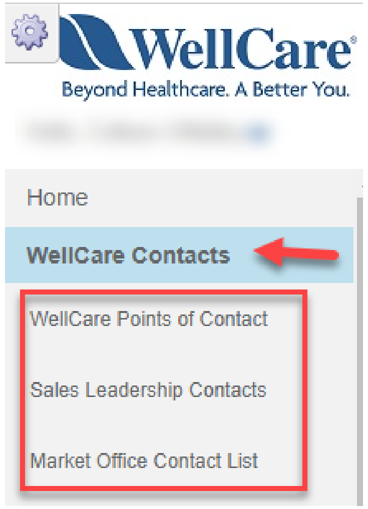
WellCare
Beyond Healthcare. A Better You.

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

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!

AGENT CONNECT USER GUIDE

MEMBER APPLICATION TRACKING

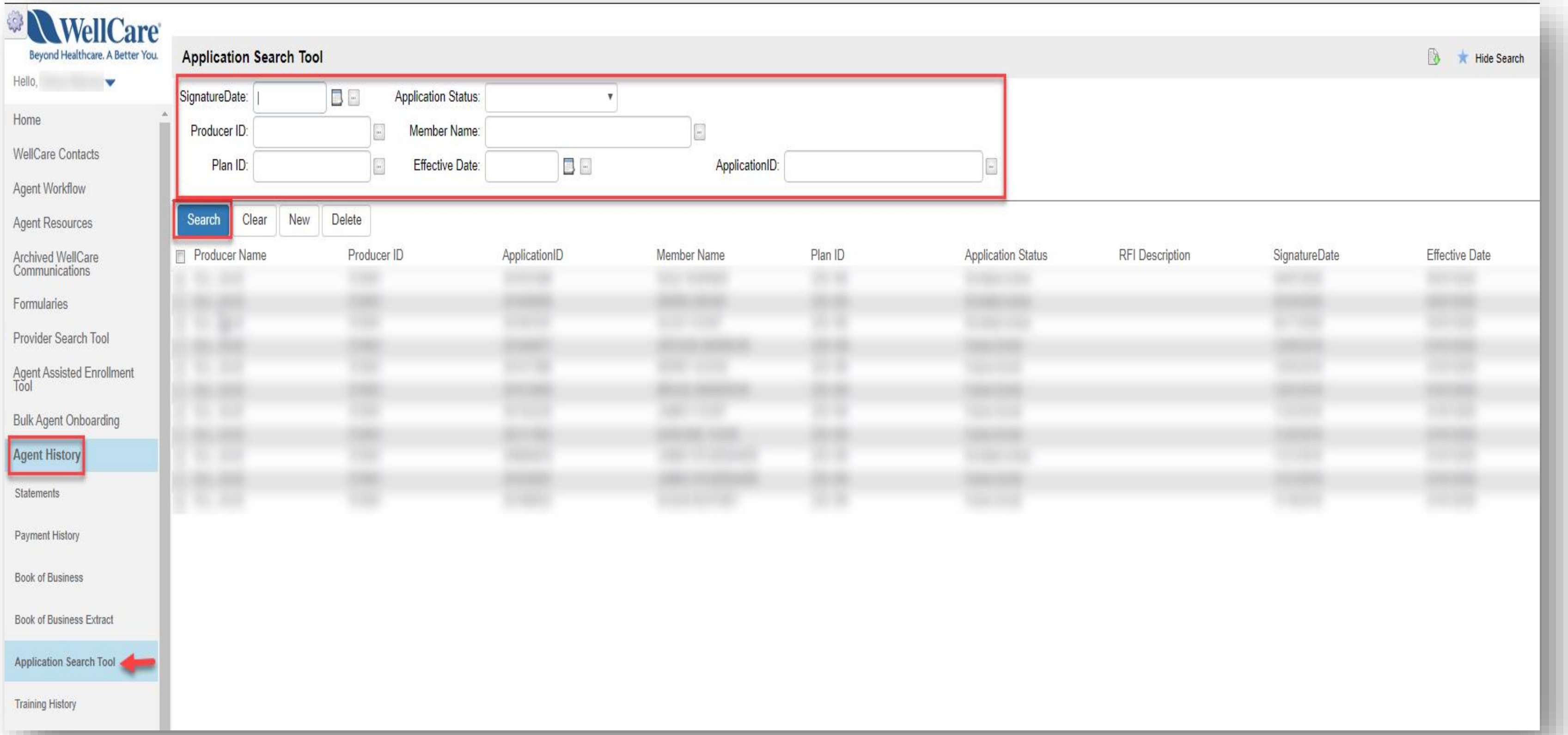
MEMBER APPLICATION TRACKING

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**



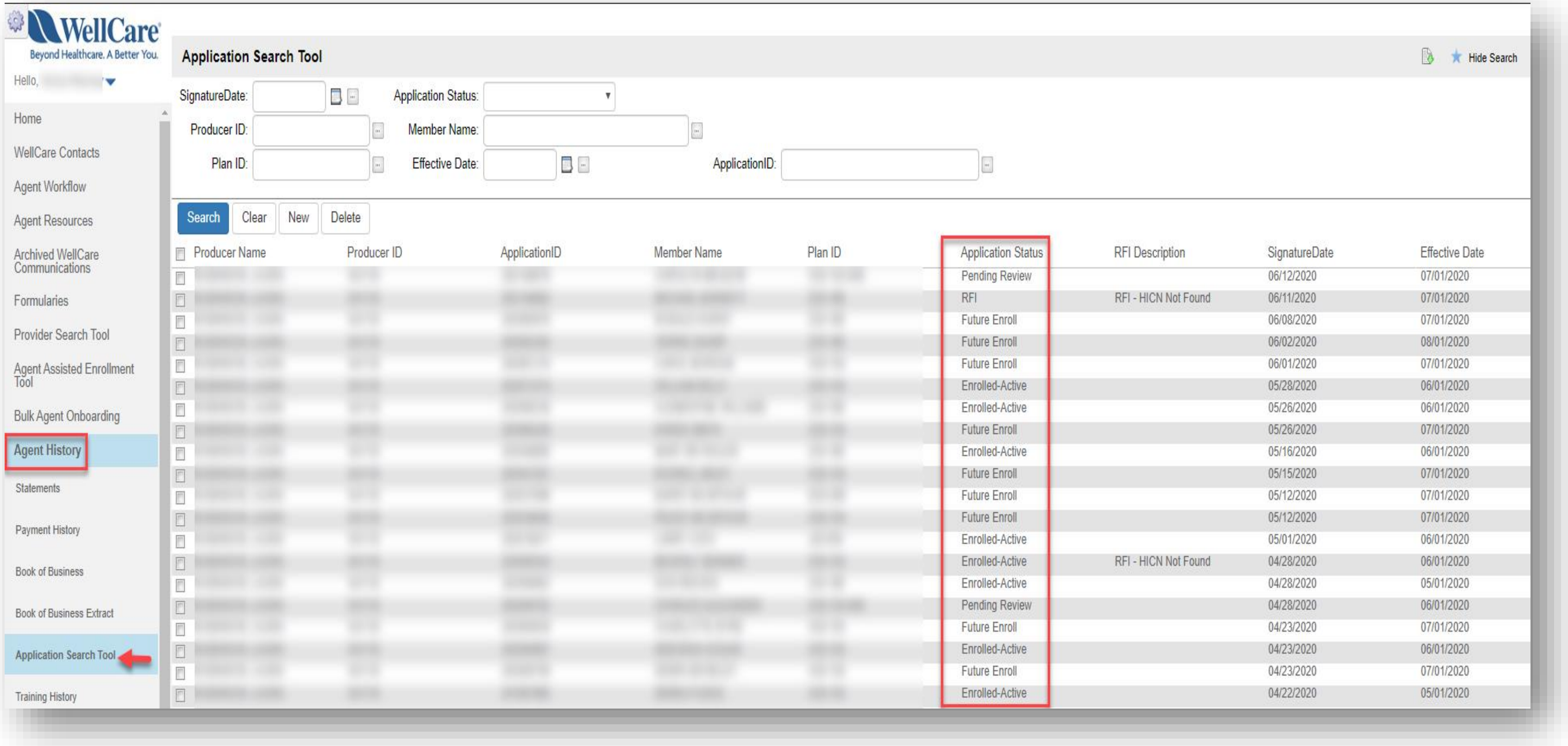
MEMBER APPLICATION TRACKING

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.*



MEMBER APPLICATION TRACKING

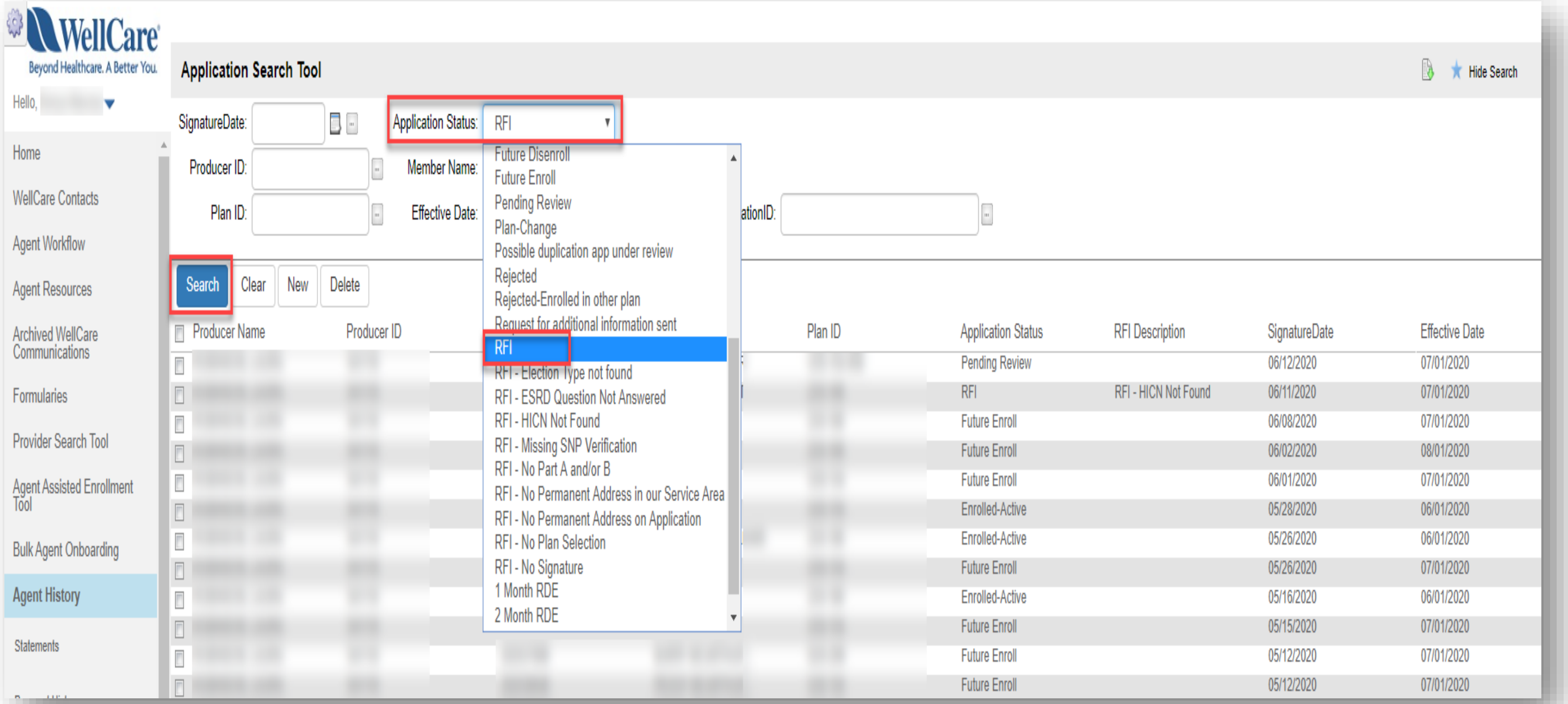
LOCATING & RESOLVING MEMBER APPLICATION THAT IS IN RFI STATUS

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.



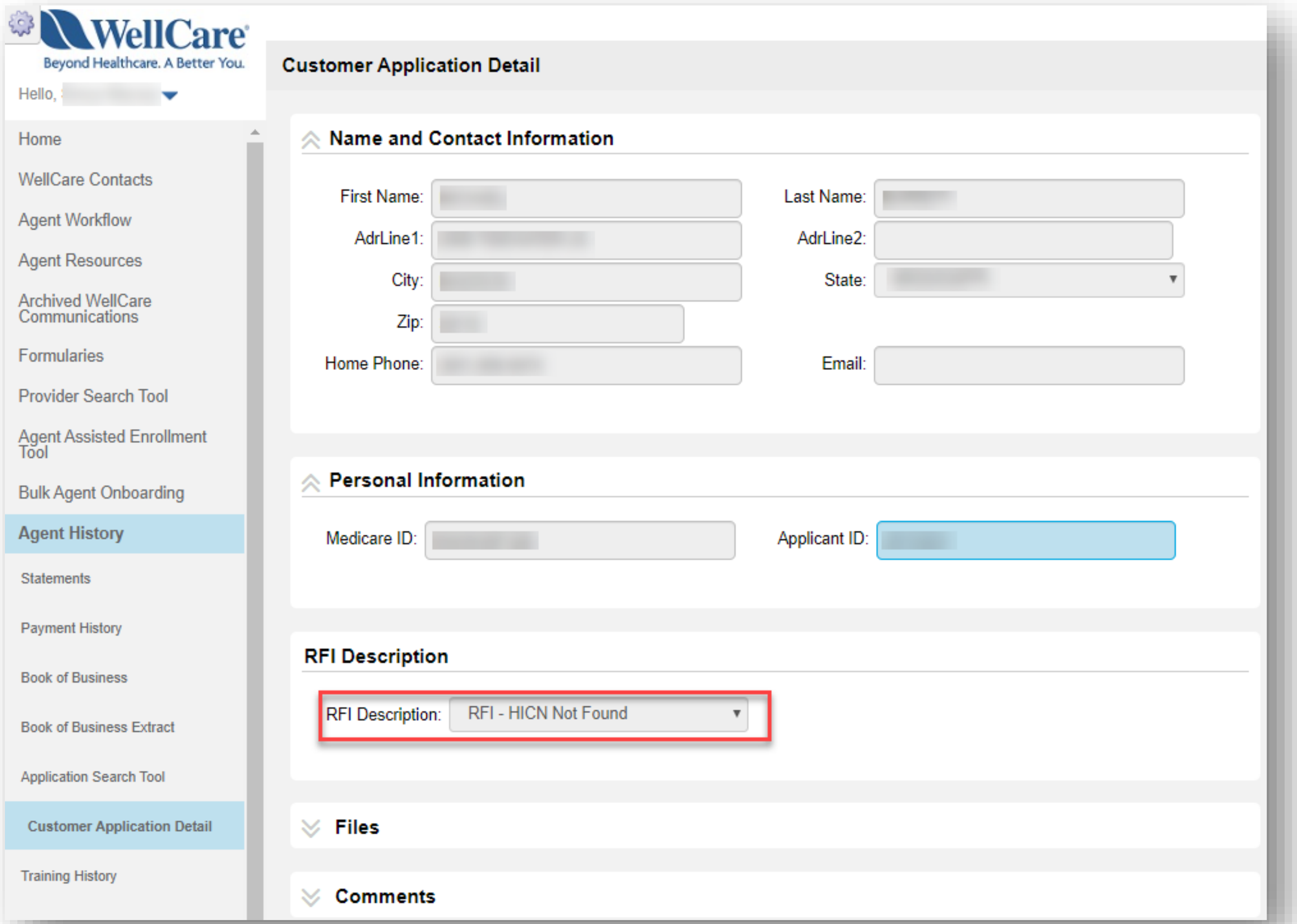
MEMBER APPLICATION TRACKING

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**.



AGENT CONNECT USER GUIDE

COMMISSIONS

COMMISSIONS

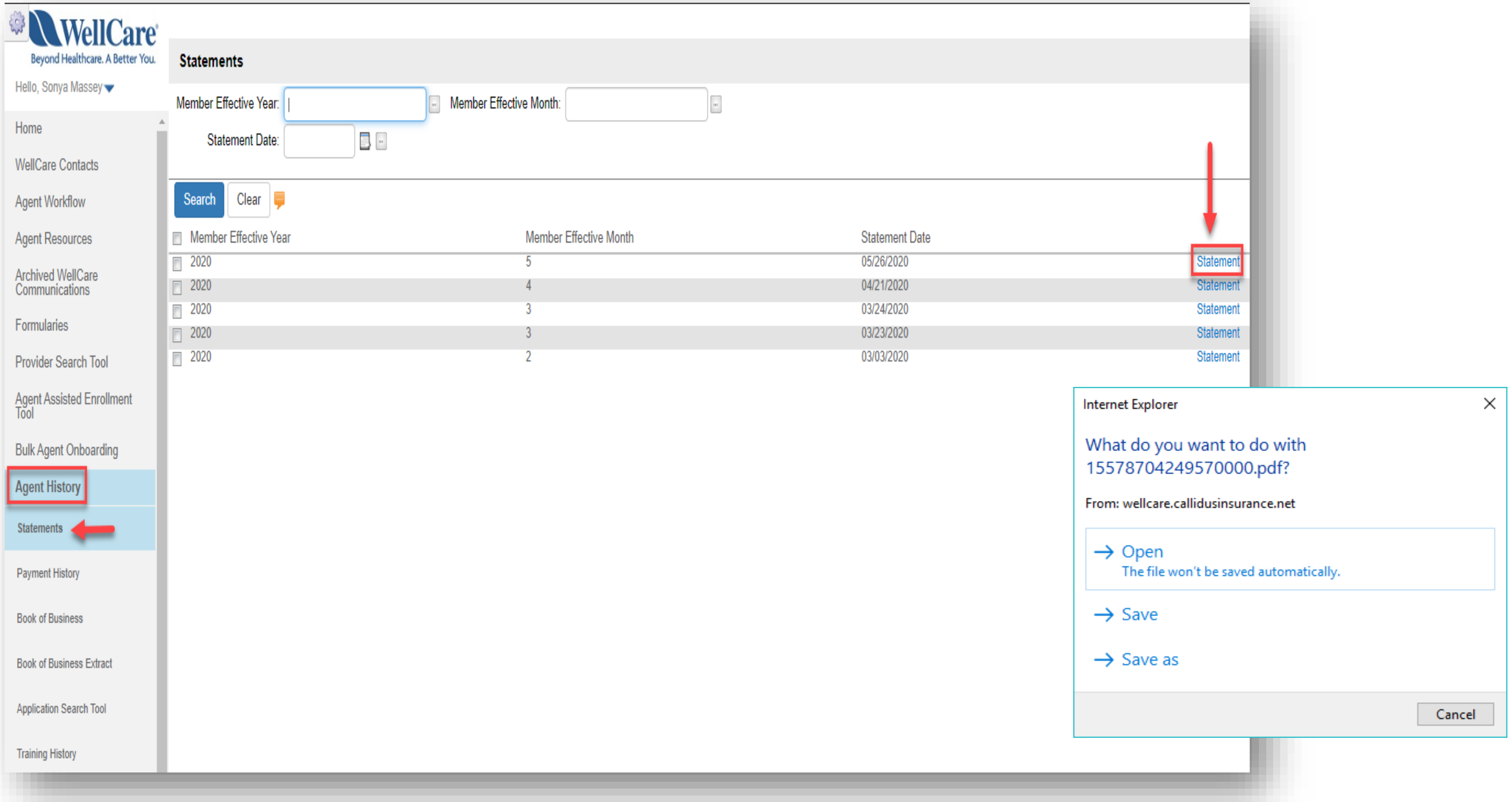
LOCATING & DOWNLOADING COMMISSION STATEMENTS

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.



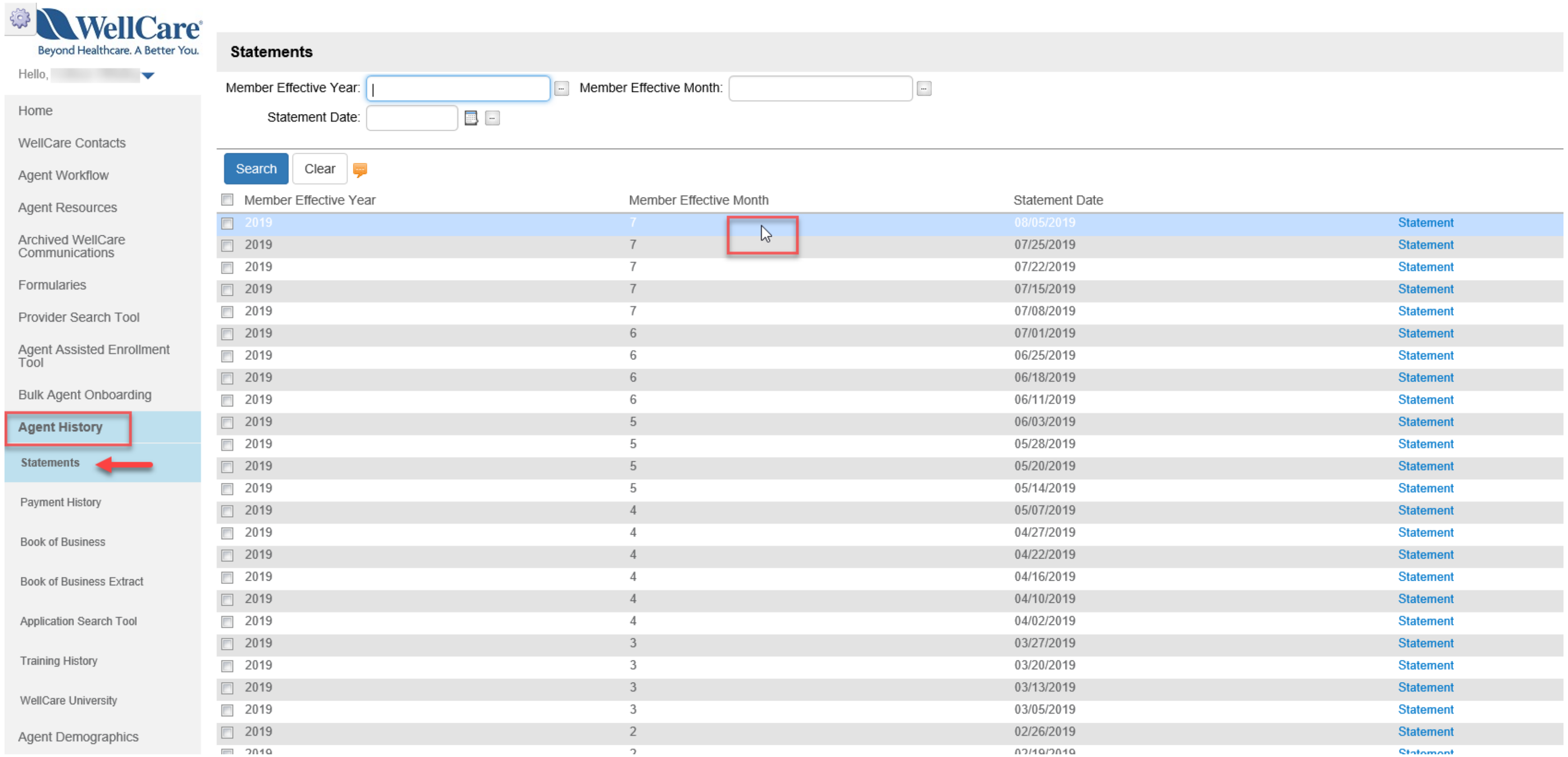
COMMISSIONS

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.

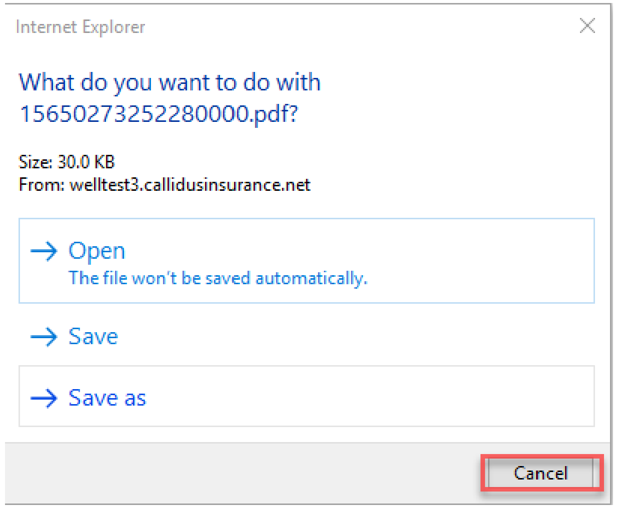
Click on the <u>**row**</u> of the Statement you would like to extract.



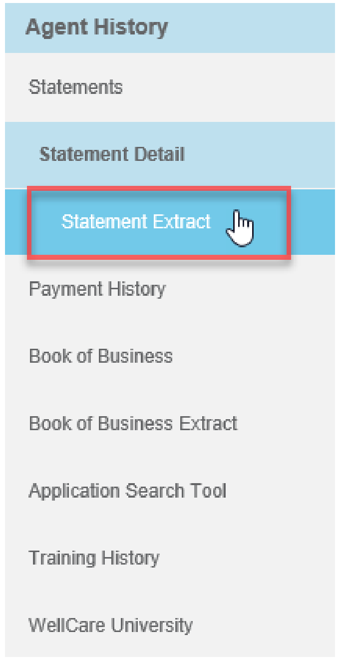
COMMISSIONS

DOWNLOADING STATEMENT EXTRACT

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



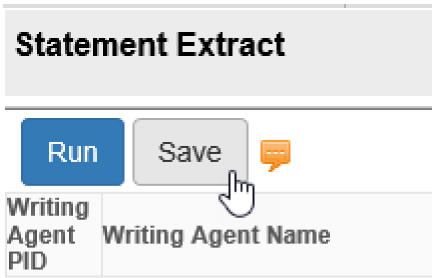
Step 3: A Statement Extract sub- tab will appear. Click **Statement Extract.**

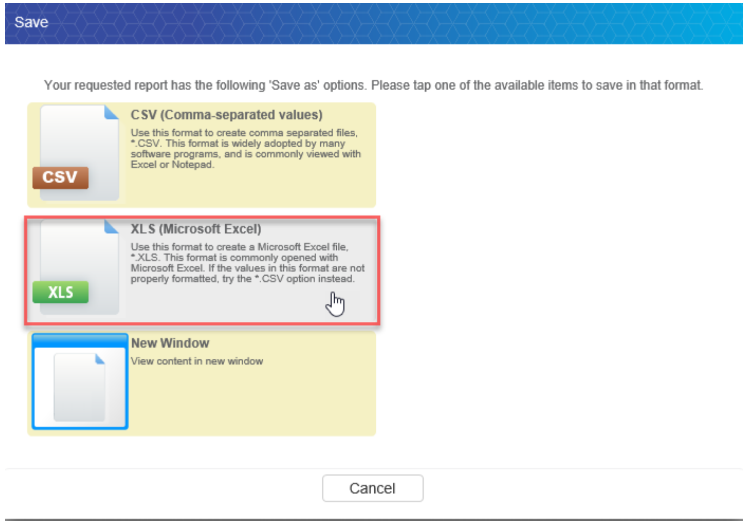


COMMISSIONS

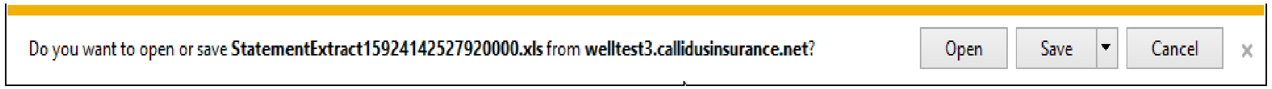
DOWNLOADING STATEMENT EXTRACT

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





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

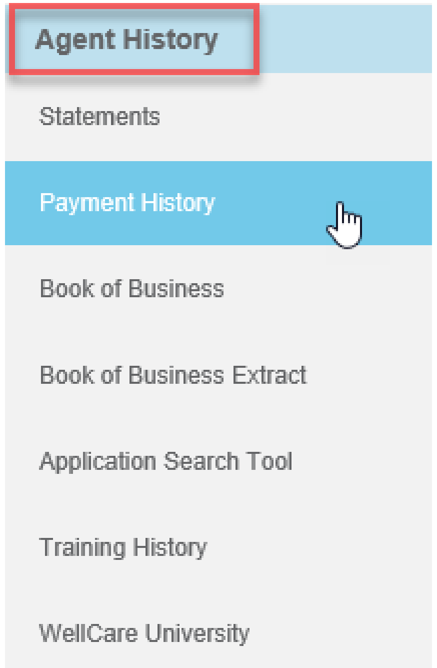


COMMISSIONS

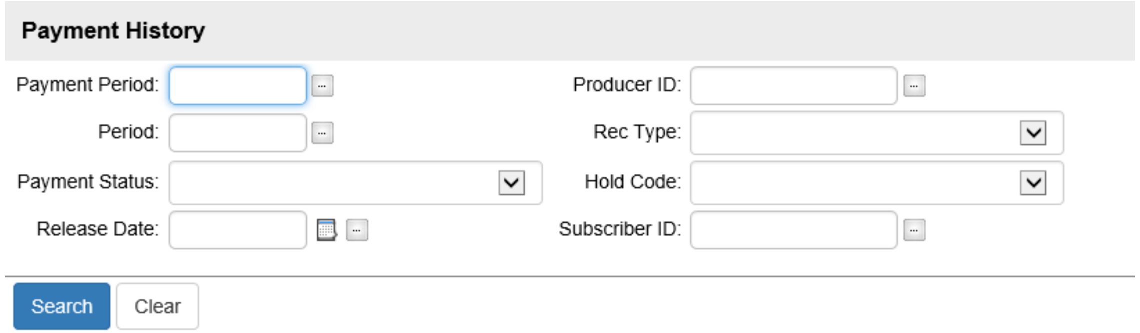
VIEWING PAYMENT HISTORY

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

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



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

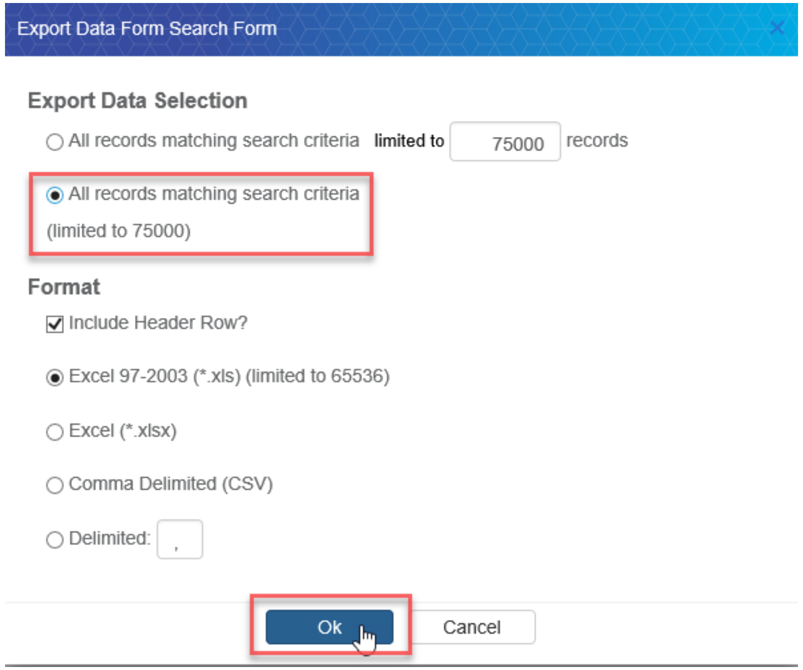


COMMISSIONS

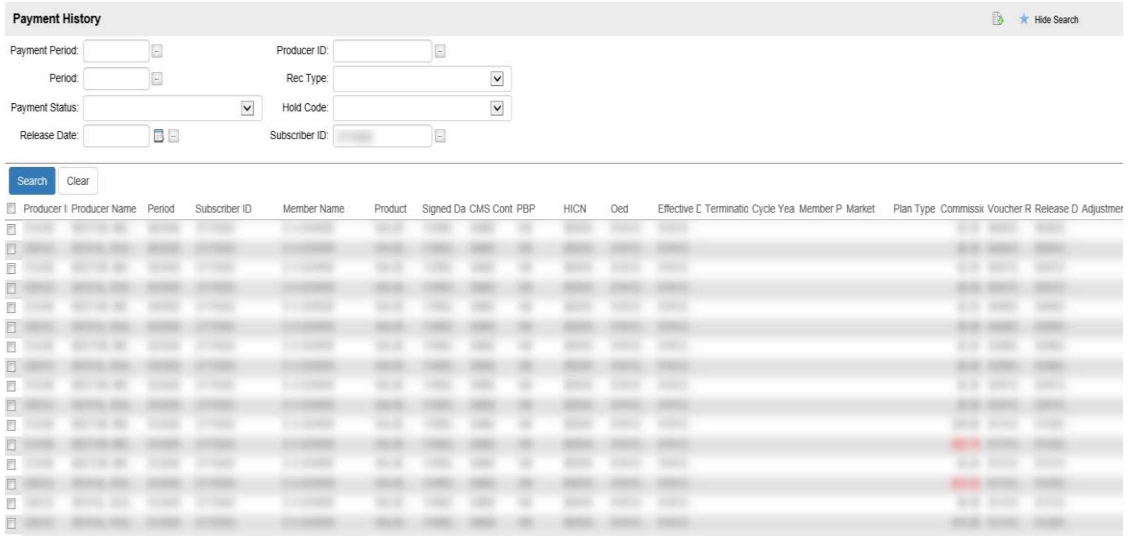
VIEWING PAYMENT HISTORY

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

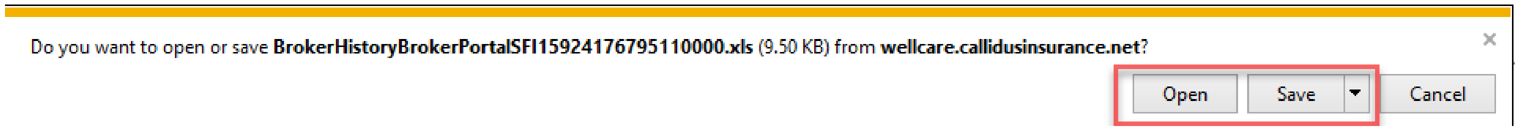
Select ‘All records matching search criteria’ bullet. Click **OK.**



Step 3: The information will populate.



Step 5: **Open** or **Save** the Excel download.

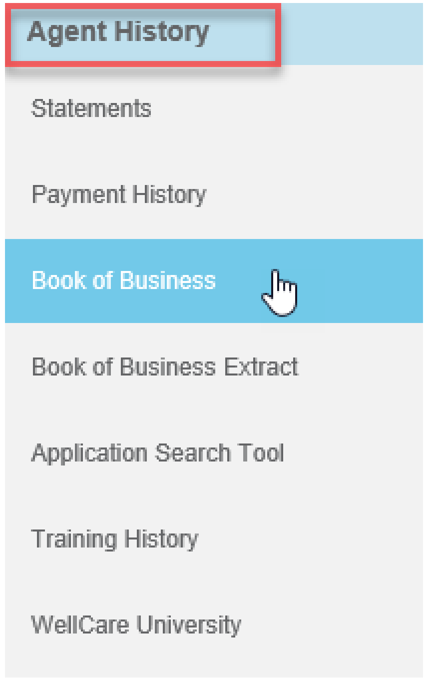


COMMISSIONS

VIEWING YOUR BOOK OF BUSINESS

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

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



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

COMMISSIONS

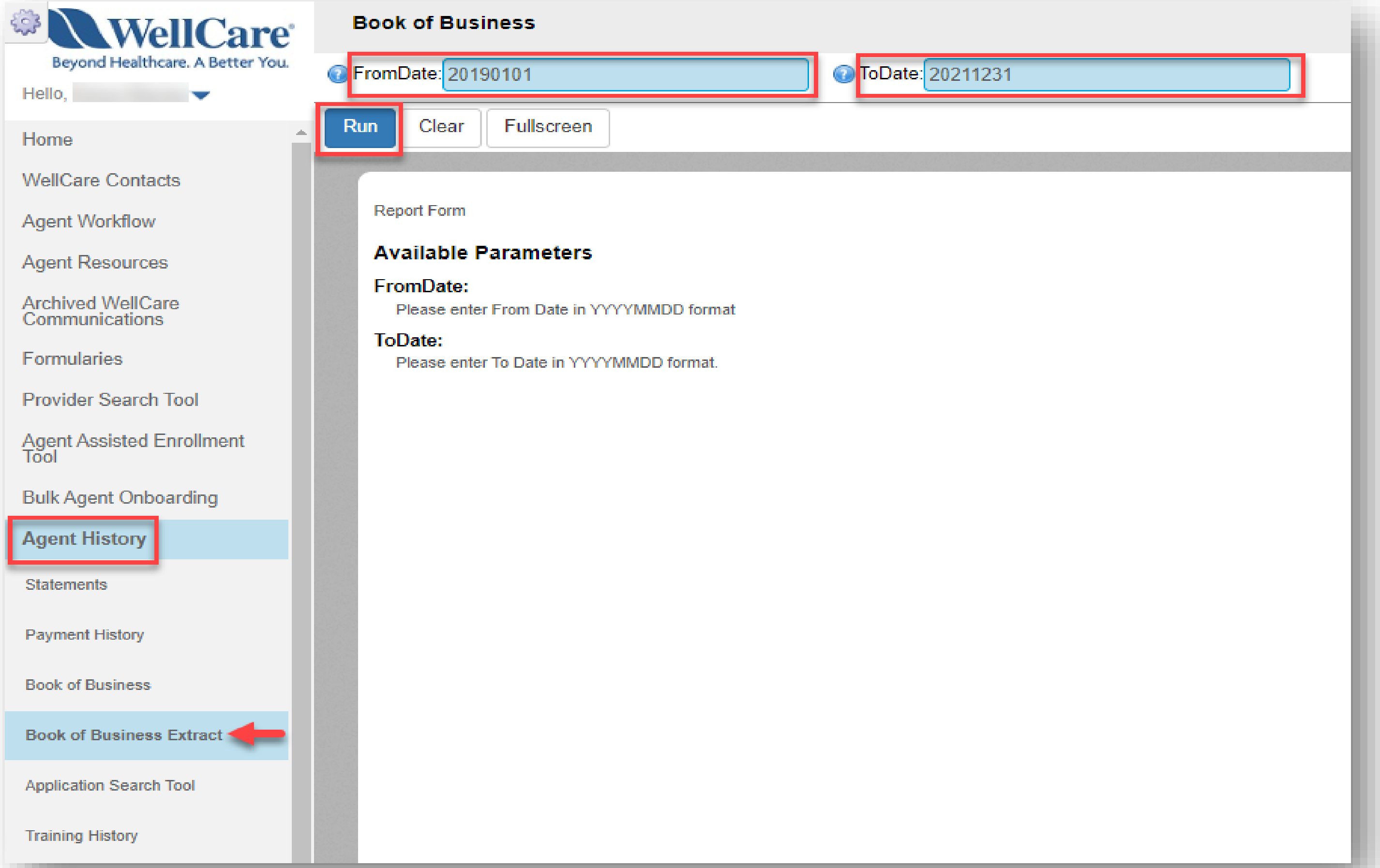
DOWNLOADING BOOK OF BUSINESS

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

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

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

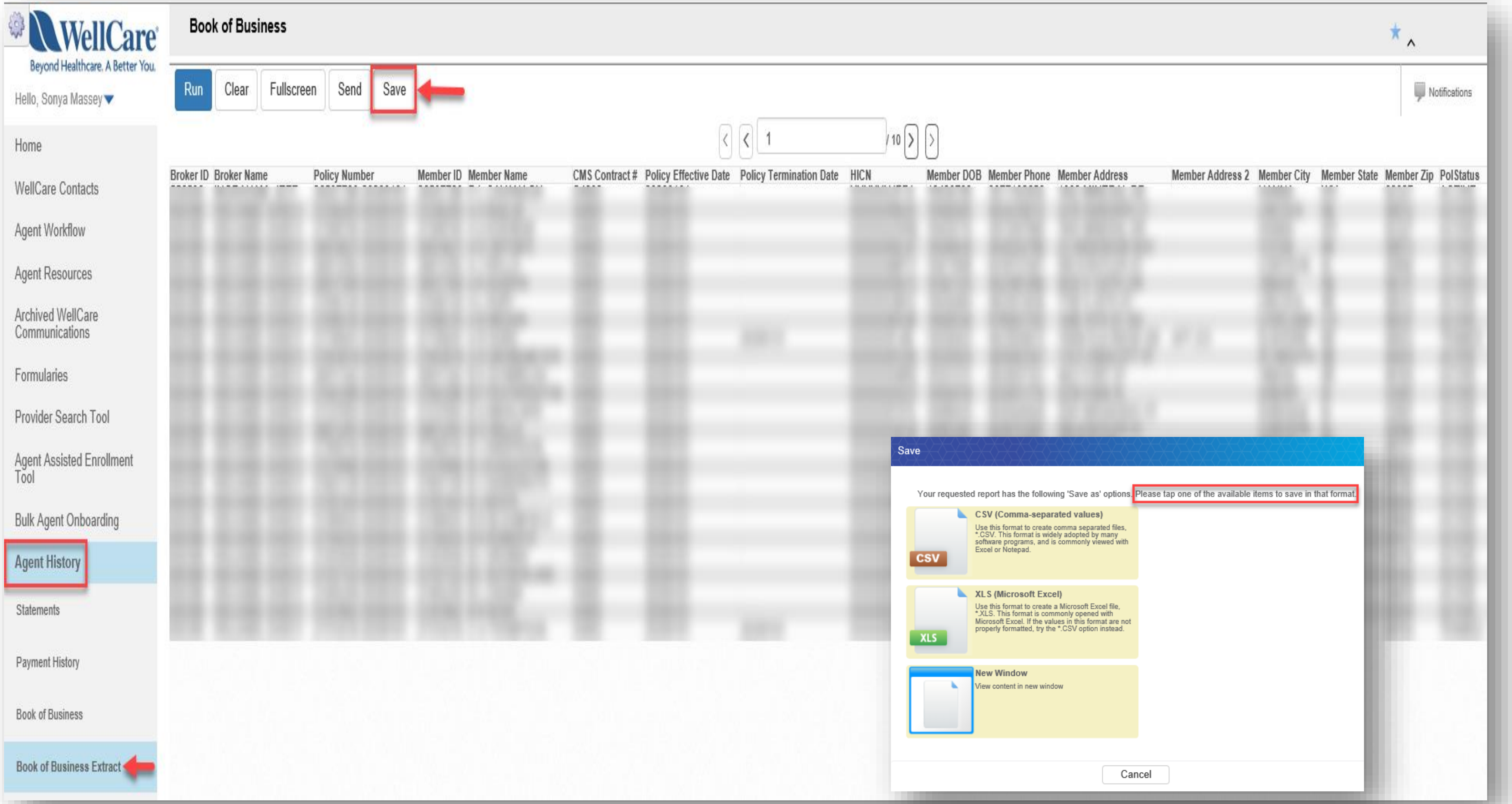
Step 2: Click **Run** to populate results.



COMMISSIONS

DOWNLOADING BOOK OF BUSINESS (continued)

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



AGENT CONNECT USER GUIDE

AGENT PROFILE CHANGES

AGENT PROFILE CHANGES

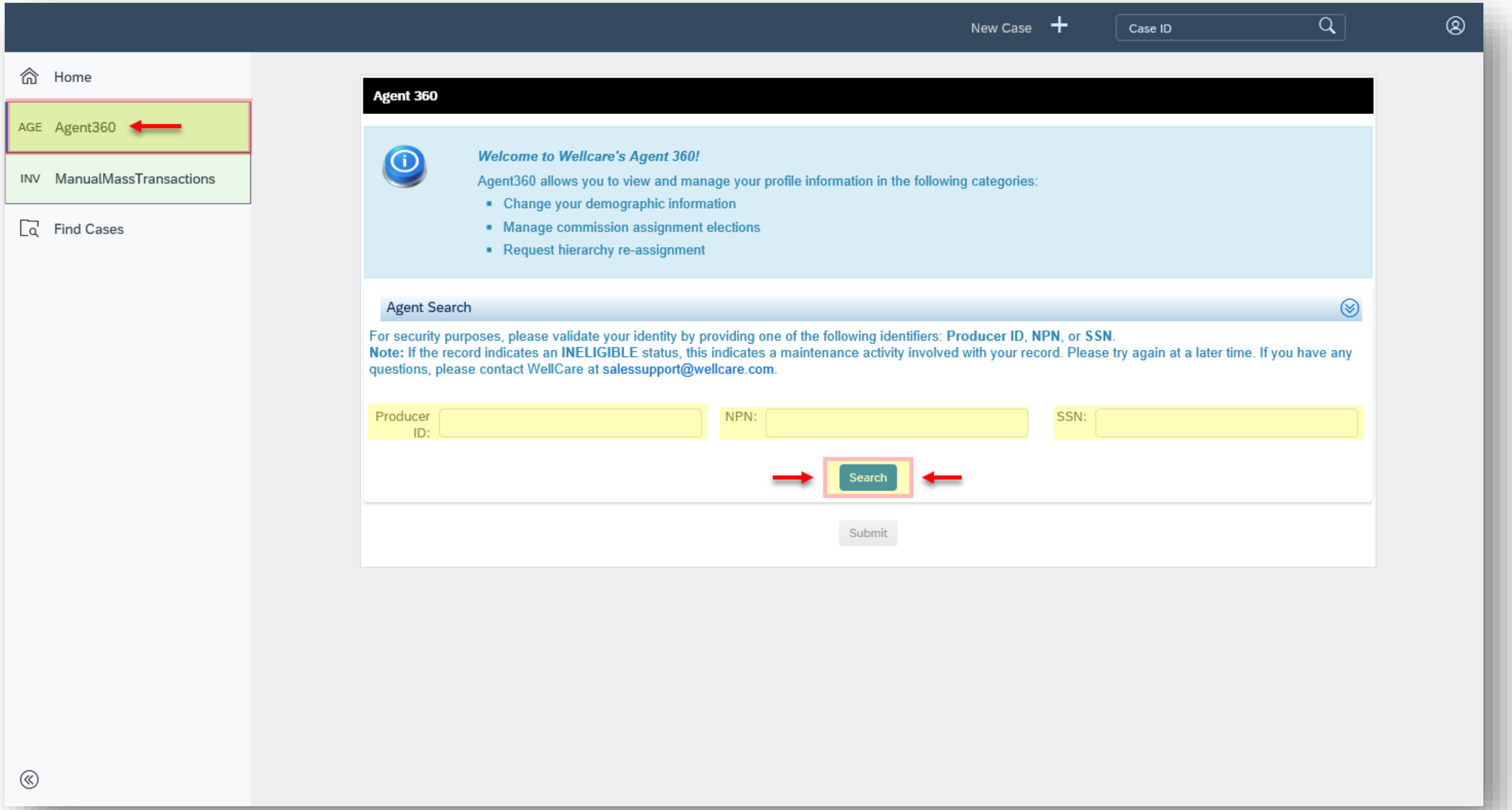
AGENT 360 VALIDATION

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**

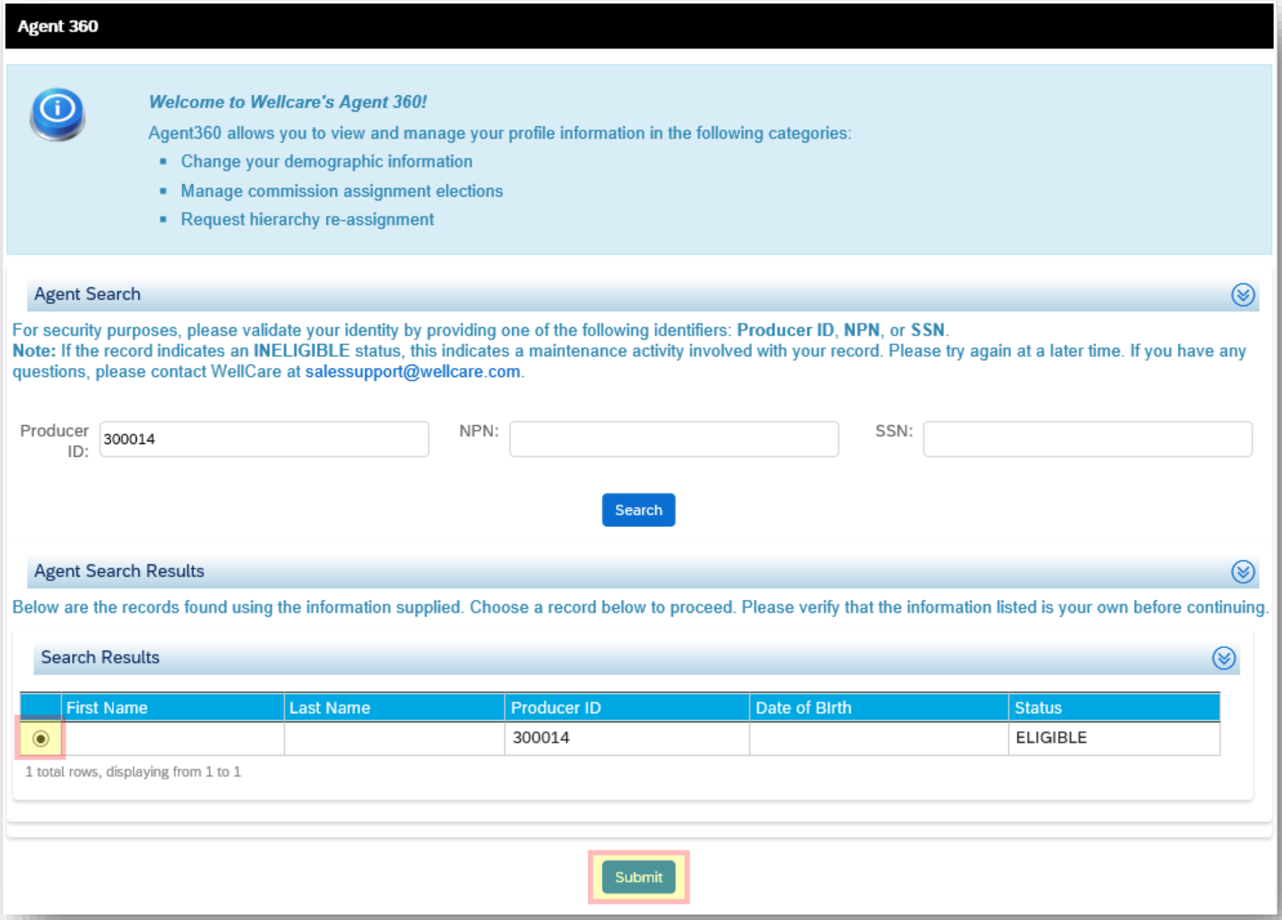


AGENT PROFILE CHANGES

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.



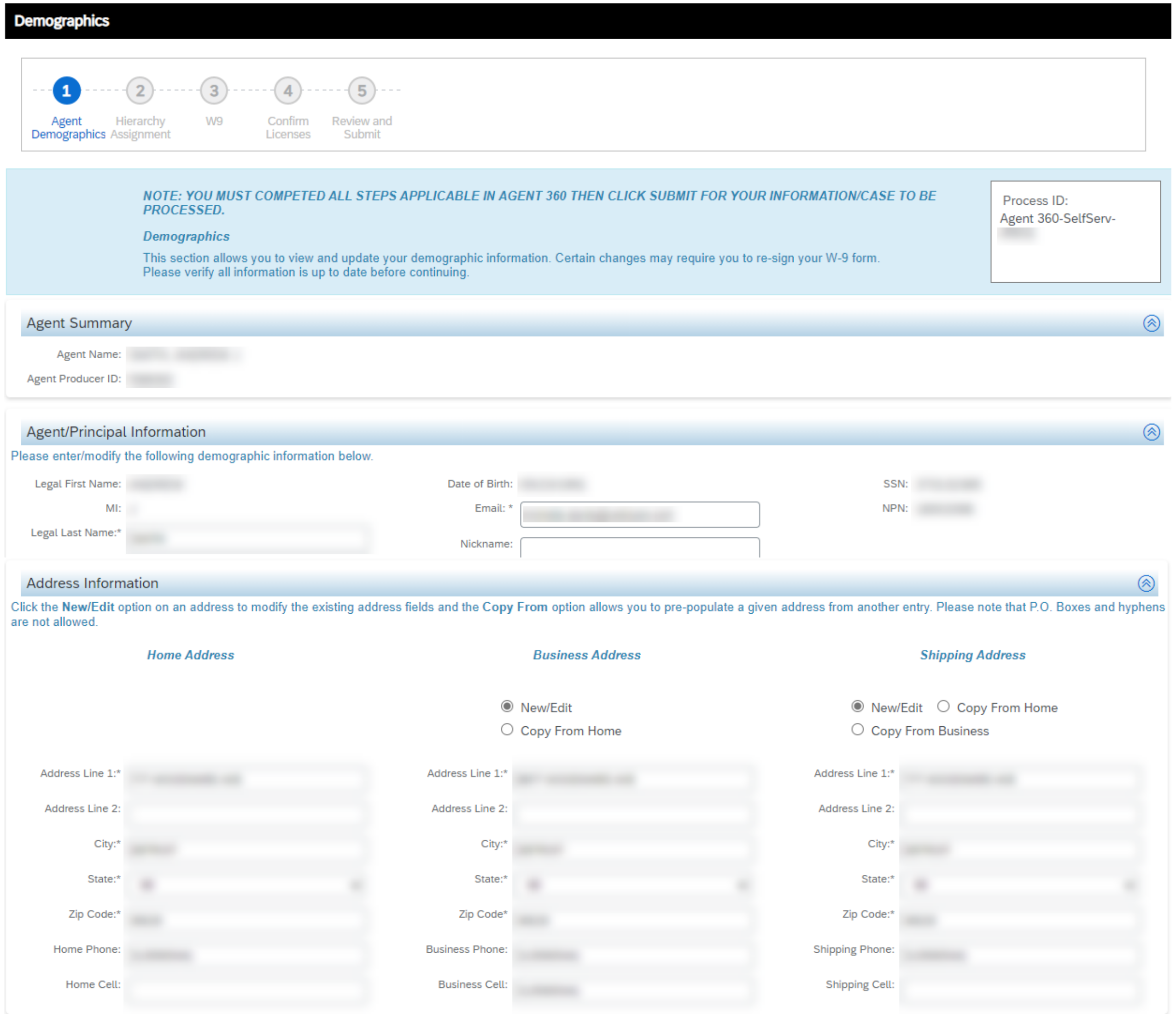
AGENT PROFILE CHANGES

DEMOGRAPHIC CHANGES TO YOUR PROFILE

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

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

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

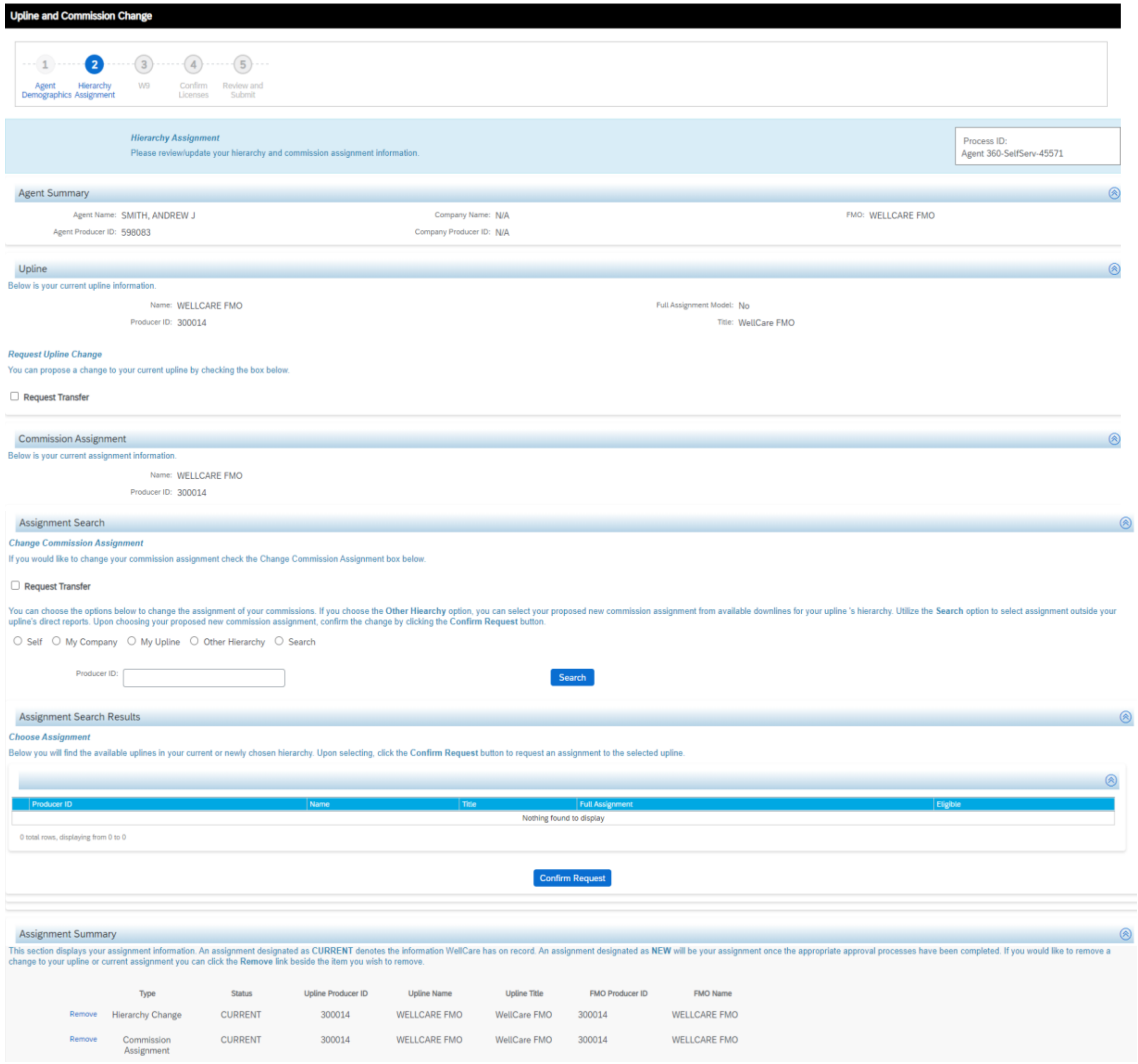


AGENT CONNECT USER GUIDE

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.

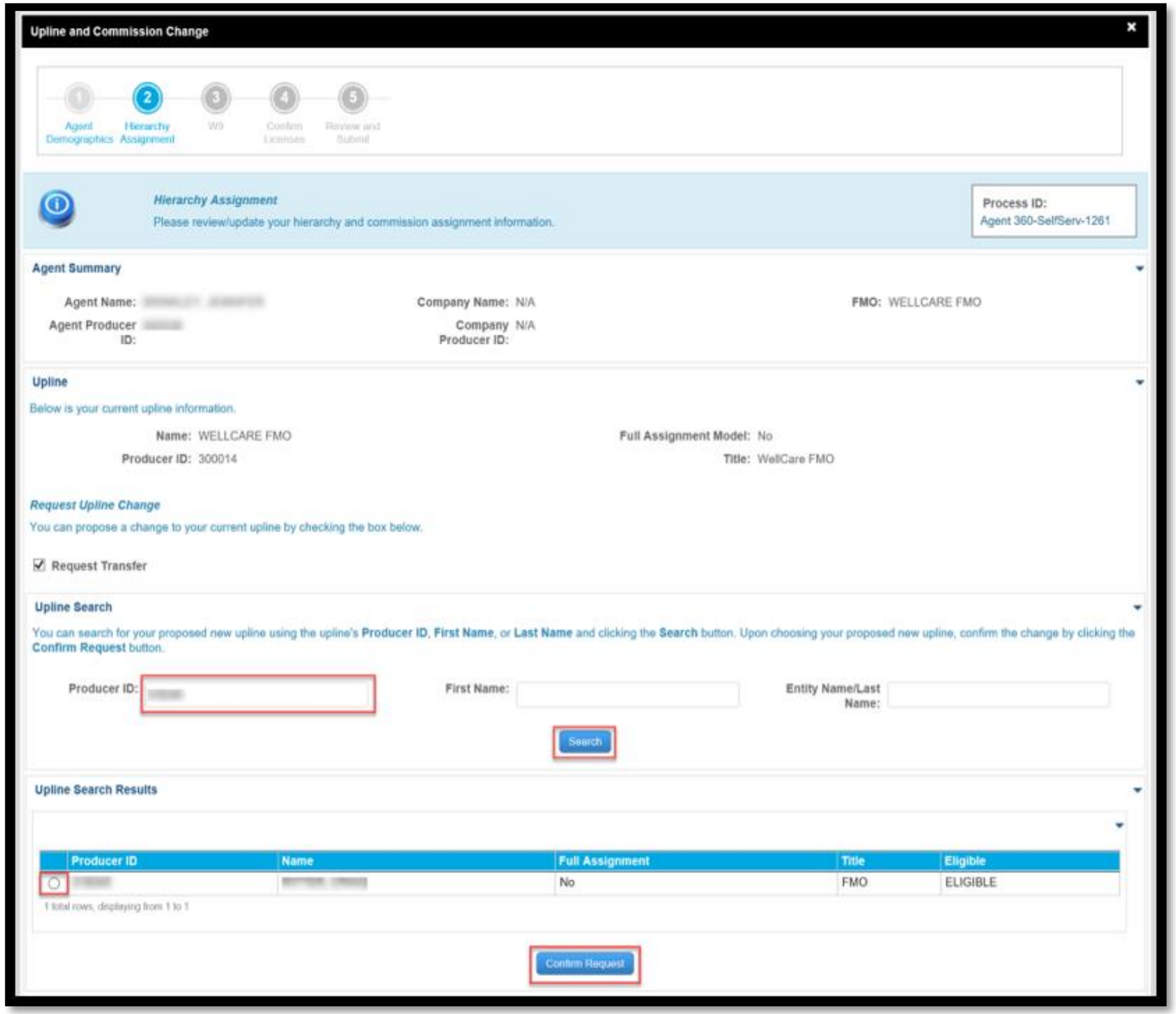
HIERARCHY & COMMISSION ASSIGNMENT CHANGES

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**



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**.

WellCare®
Beyond Healthcare. A Better You.

Dear [redacted],

This email is to inform you that your request for hierarchy reassignment has been rejected at this time:

New Hierarchy: [redacted]

Prior Hierarchy: WELLCARE FMO

Please login to Agent Connect to contact Sales Support or contact your local District Sales Manager if you have any questions.

Regards,

WellCare Sales Support

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.

WellCare®

Beyond Healthcare. A Better You.

Dear [redacted],

This email is to inform you that your hierarchy change request has been approved and processed and is outlined below.

New Hierarchy: [redacted]

Prior Hierarchy: WELLCARE FMO

Please login to Agent Connect to contact Sales Support or contact your local District Sales Manager if you have any questions.

Regards,

WellCare Sales Support

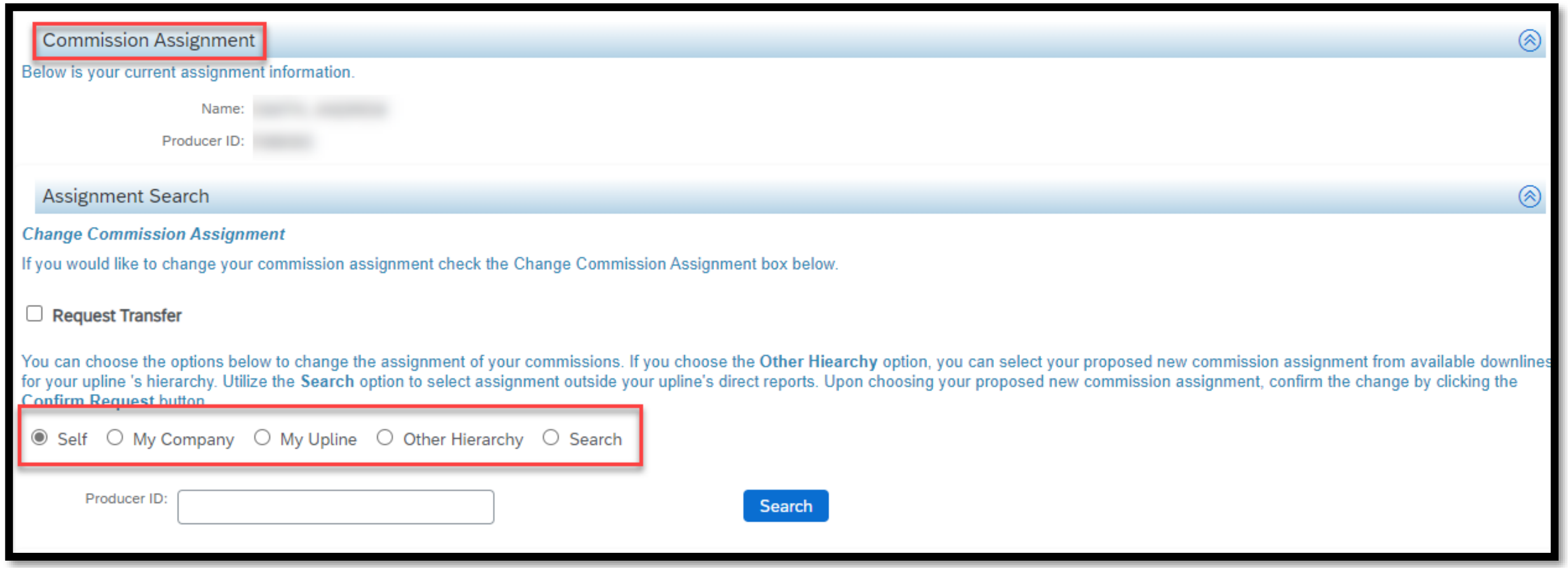
HIERARCHY & COMMISSION ASSIGNMENT CHANGES

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)



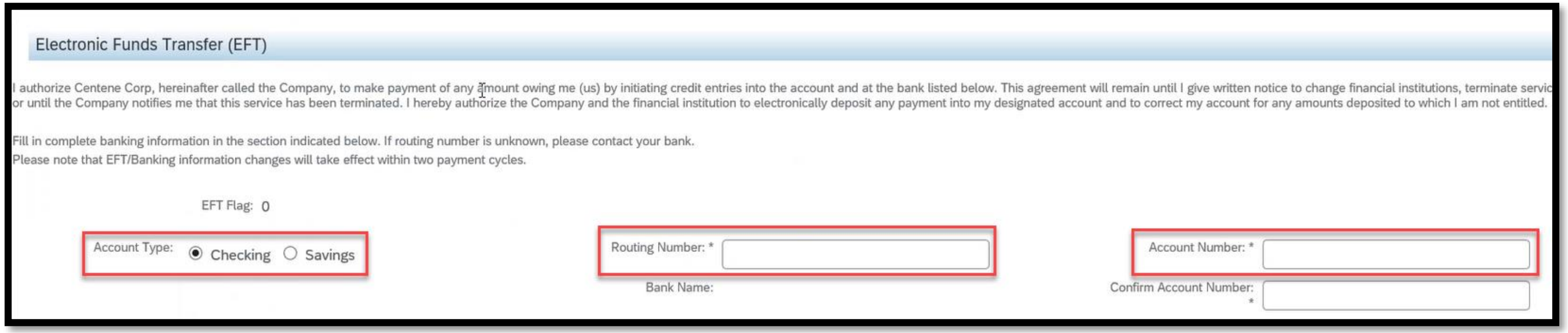
Click **Confirm Request**

HIERARCHY & COMMISSION ASSIGNMENT CHANGES

COMMISSION CHANGE / ASSIGNMENT OPTIONS

Self/ My Company:

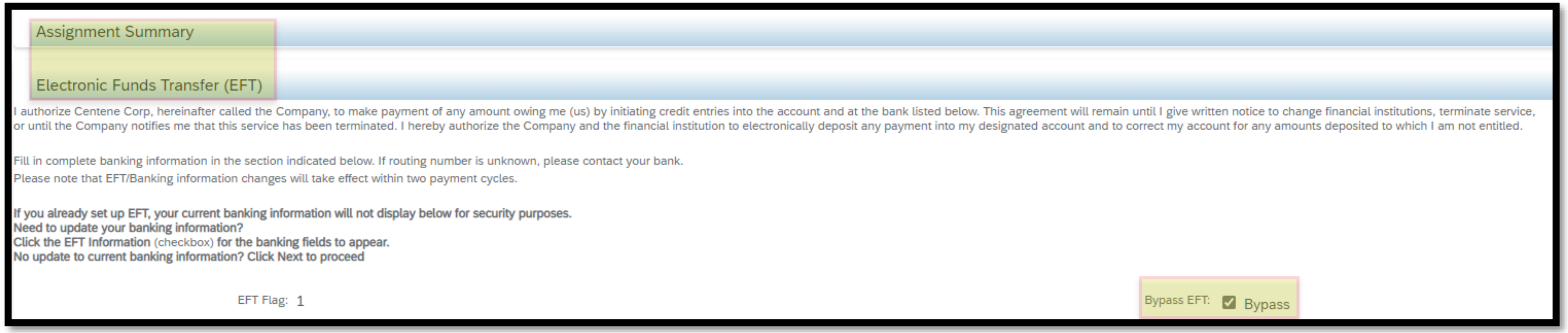
- Select **Checking** or **Savings** to confirm your Account Type
- Enter your **Routing Number**, and your Bank Name will populate
- Enter your **Account Number**. You must enter this number twice for verification purposes
- Click **Next**



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.

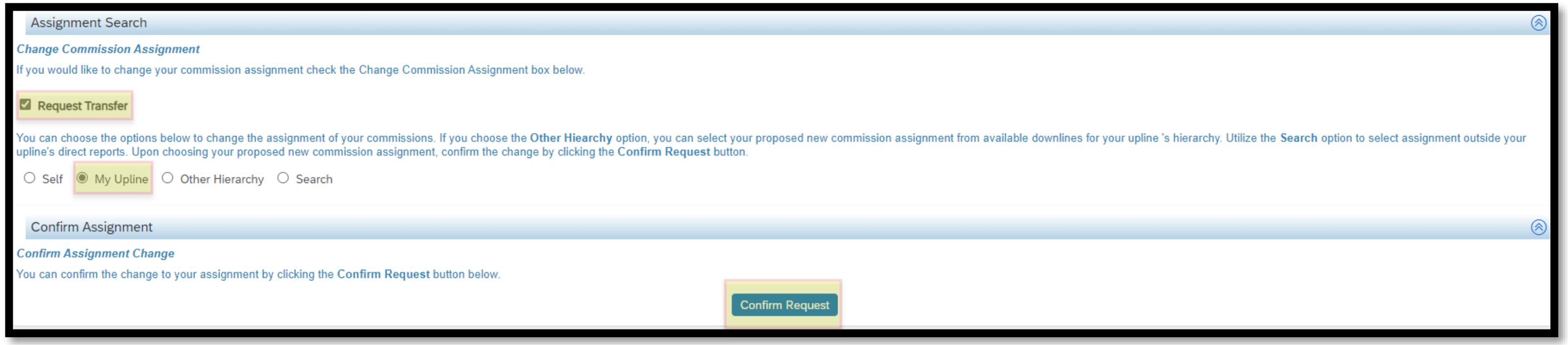


HIERARCHY & COMMISSION ASSIGNMENT CHANGES

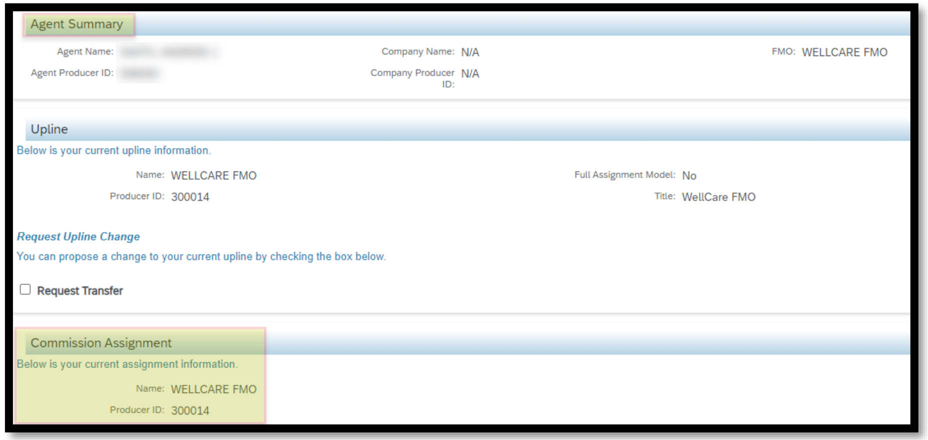
COMMISSION CHANGE / ASSIGNMENT OPTIONS

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.

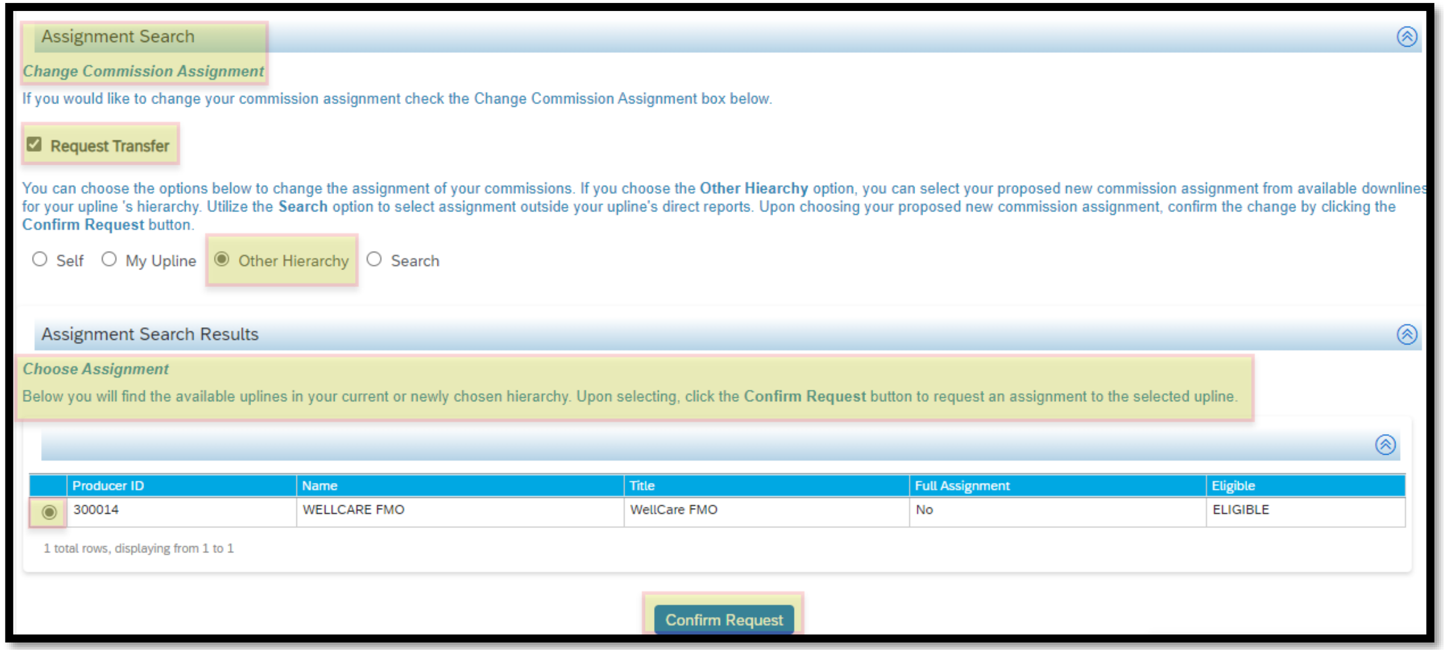


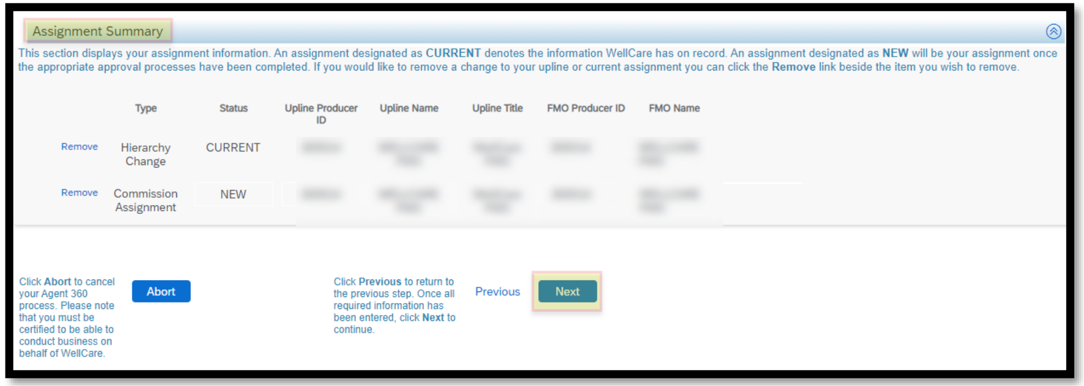
HIERARCHY & COMMISSION ASSIGNMENT CHANGES

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





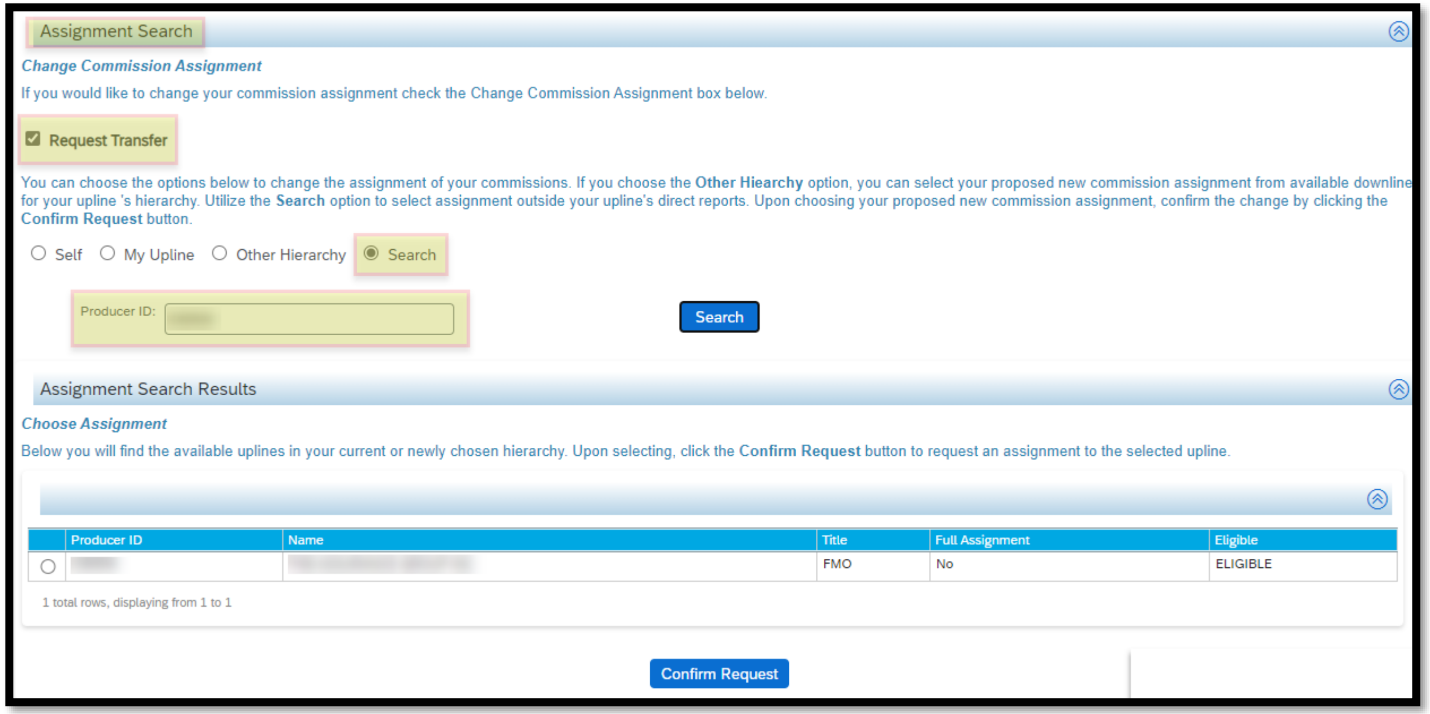
NOTE: Selecting Other Hierarchy will update and remove any previously provided EFT information.

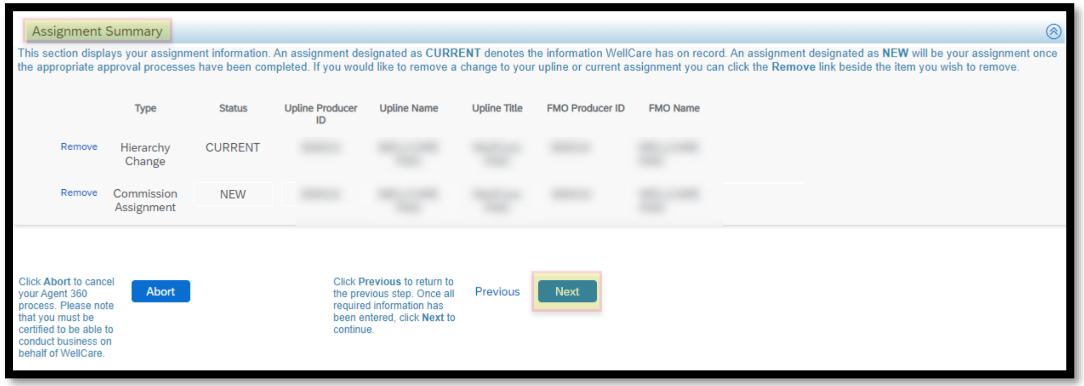
HIERARCHY & COMMISSION ASSIGNMENT CHANGES

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.

HIERARCHY & COMMISSION ASSIGNMENT CHANGES

COMMISSION ASSIGNMENT – COMPLETE

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

WellCare

Beyond Healthcare. A Better You.

Dear [redacted],

This email is to inform you that we have processed your request to change your commission assignment:

New/Current Commissions Assignment : [redacted]

Prior Commissions Assignment : [redacted]

Please note commissions are paid to agents who are certified with WellCare; assignees who are not certified will not receive commissions.

Please login to Agent Connect to contact Sales Support or contact your local District Sales Manager if you have any questions.

Regards,

WellCare Sales Support

AGENT CONNECT USER GUIDE

REQUIRED FORMS & ACKNOWLEDGEMENT

REQUIRED FORMS & ACKNOWLEDGEMENT

IRS W9 TAX FORM

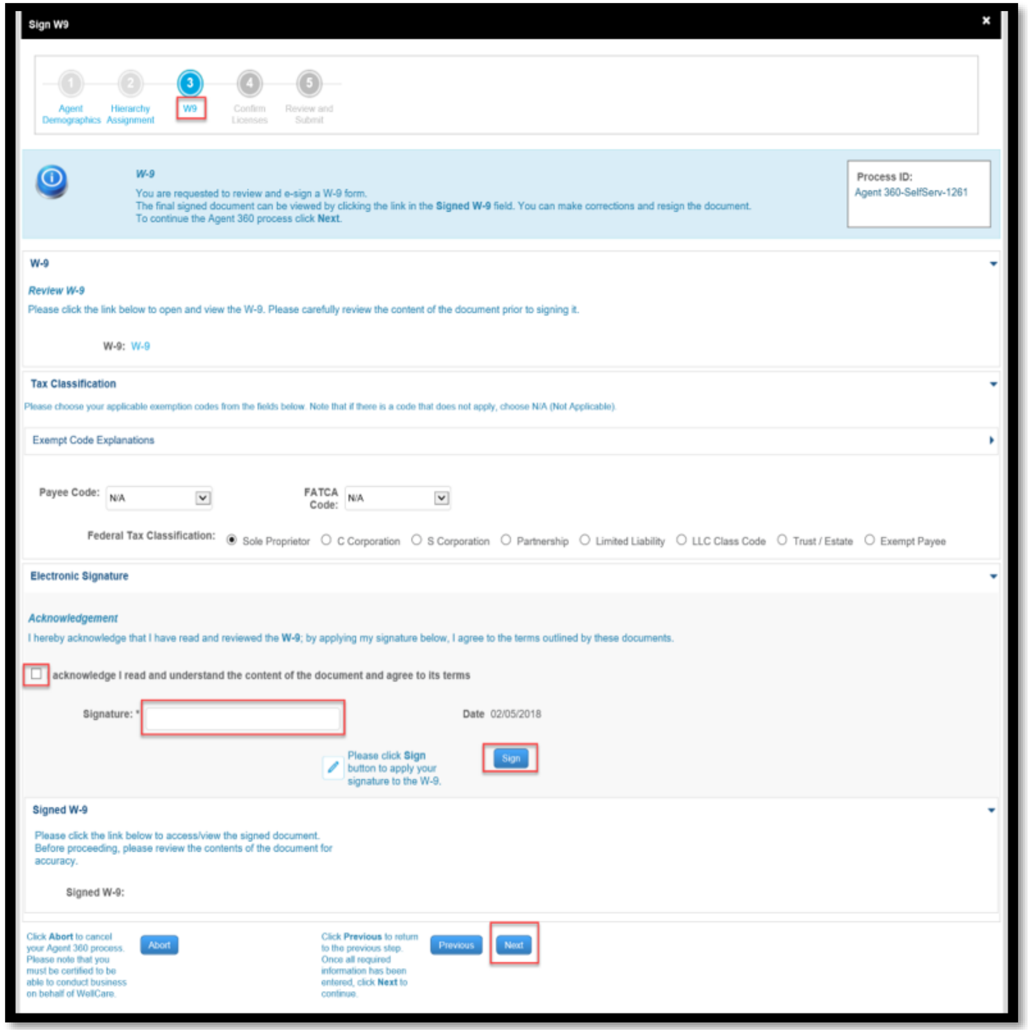
Section 3 - If you elected to update your Name and/or Shipping address in Section 1, Section 3 is where you will sign a new W9 to reflect your changes.

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



AGENT CONNECT USER GUIDE

LICENSING

LICENSING

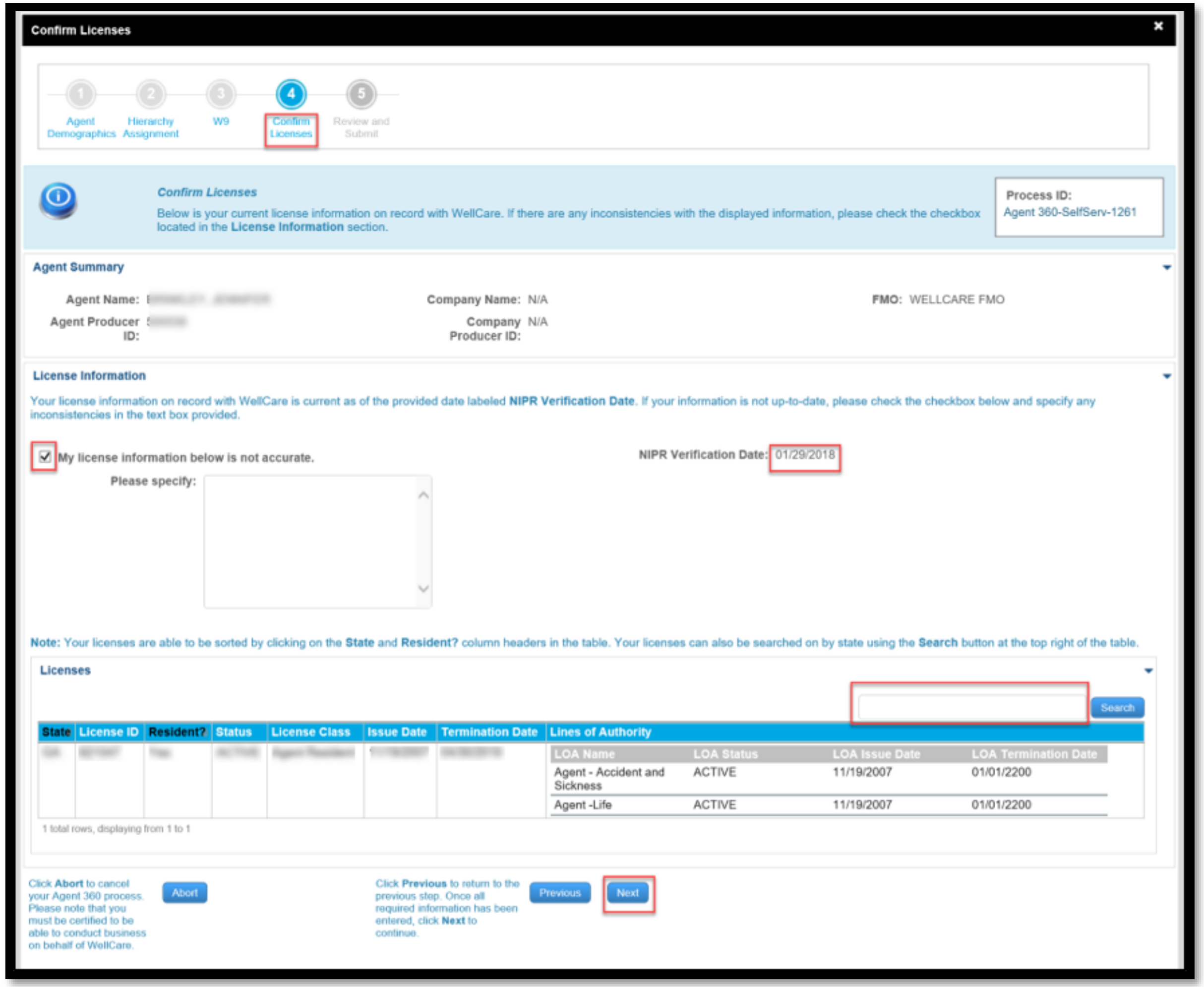
CONFIRM LICENSES

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.

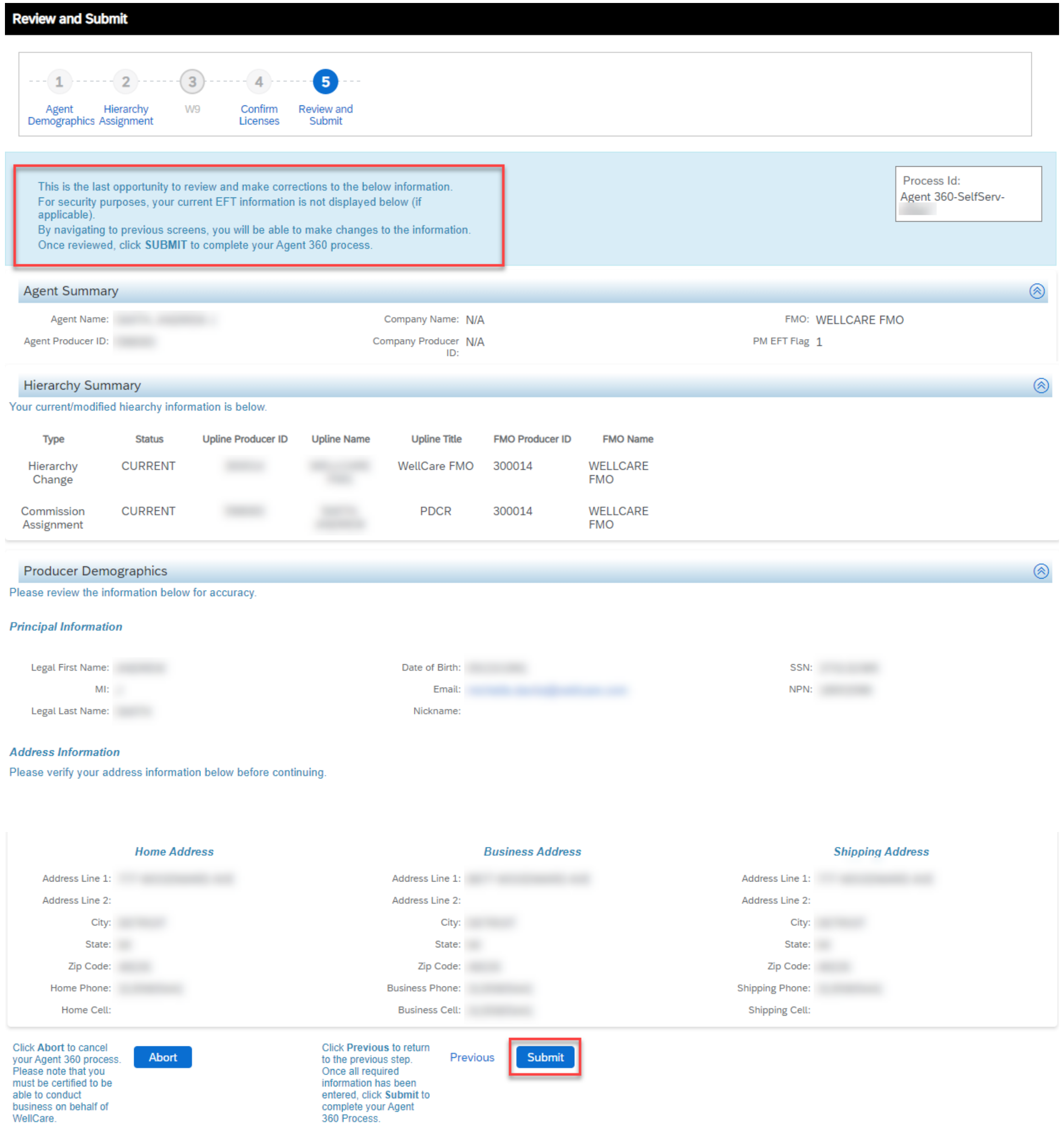
AGENT CONNECT USER GUIDE

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.

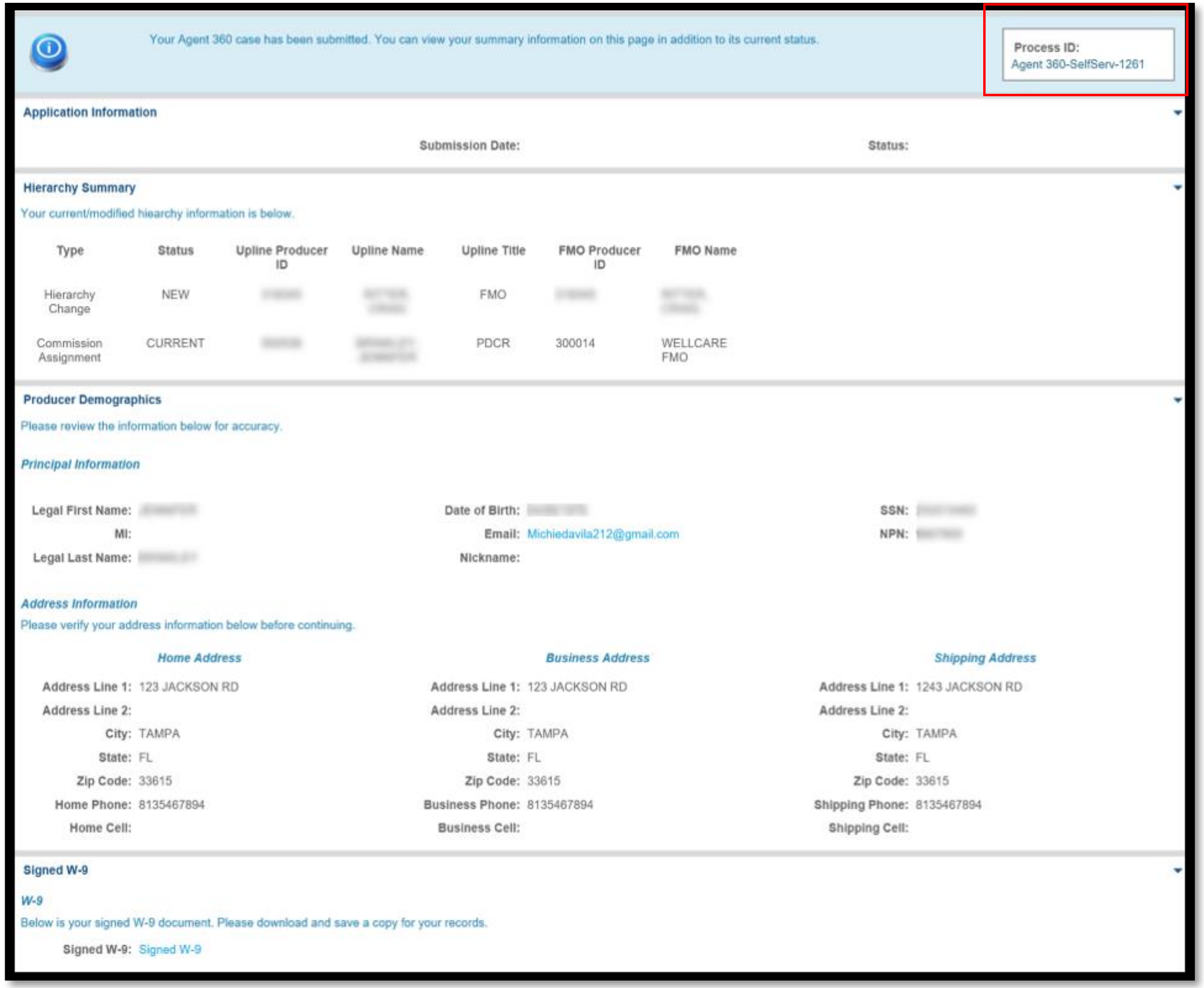
AGENT PROFILE CHANGES

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 hiearchy 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.com
Nickname:
SSN:
NPN:

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