AGENT CONNECT USER GUIDE

June 2020

CENTENE Corporation

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 Agent secure website that is used for Agent 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)

- Option 1: Register your Single Sign-On Portal: via Email from NO-REPLY@SAILPOINT.COM
- Option 2: 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

- Hierarchy Change/Assignment
- Hierarchy Change/Assignment – Rejected
- Hierarchy Change/Assignment – Complete
- Commission Change/Assignment
- Commission Assignment Complete

SECTION 3 - REQUIRED FORMS & ACKNOWLEDGEMENT

- IRS W9 Tax Form

SECTION 4 - LICENSING

- Confirm Licenses

SECTION 5 - REVIEW & SUBMIT CHANGES

- Review and Submit Changes
- Confirmation

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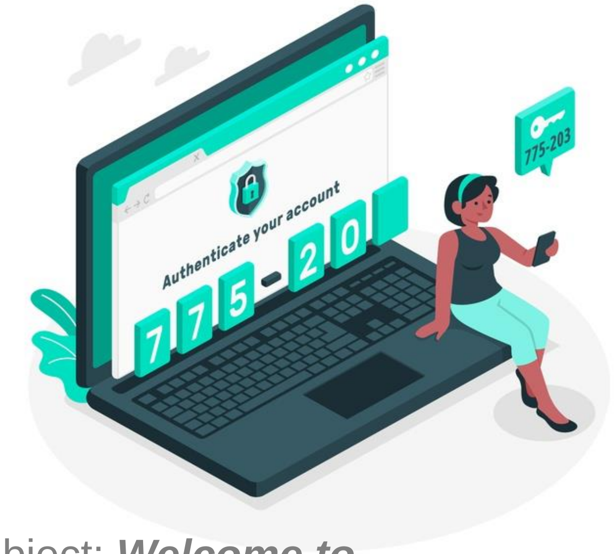
AGENT CONNECT USER GUIDE

SINGLE SIGN-ON PORTAL (SSO)

Single Sign-On Portal (SSO)

OVERVIEW

The Single Sign-On (SSO) Portal will enable you access to Agent Connect, 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

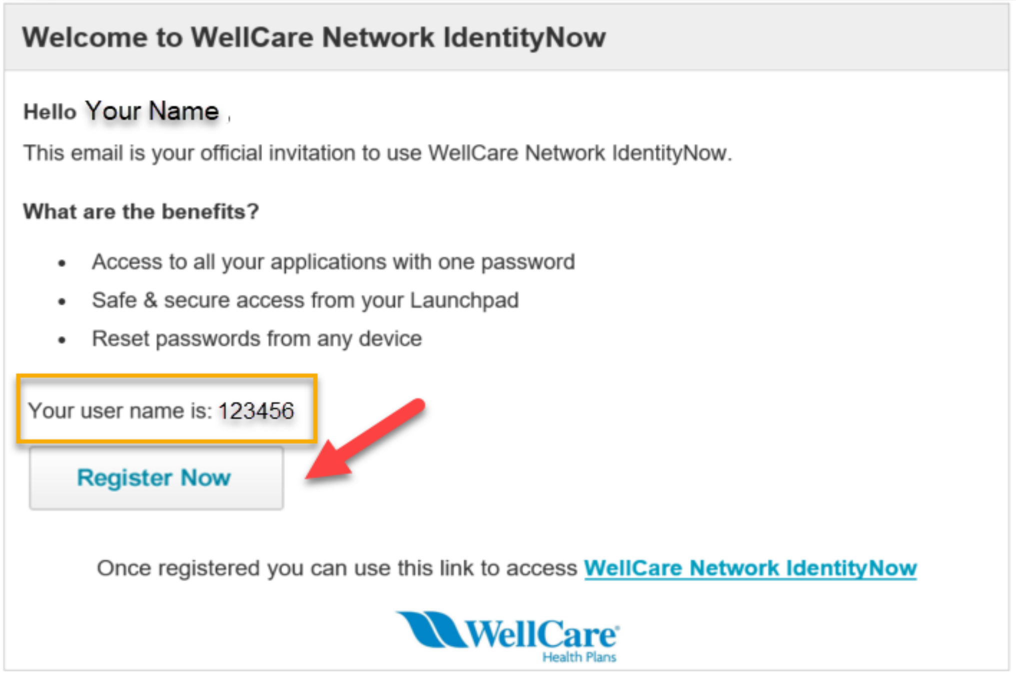
NOTE: Agencies do not have their own Single Sign-On Portal. If you are the Principal of an Agency, please refer to Page 22 for instructions on how to switch views to your agency's portal.

Single Sign-On Portal (SSO)

Option 1: REGISTER YOUR SINGLE SIGN-ON PORTAL: via EMAIL

From NO-REPLY@SAILPOINT.COM

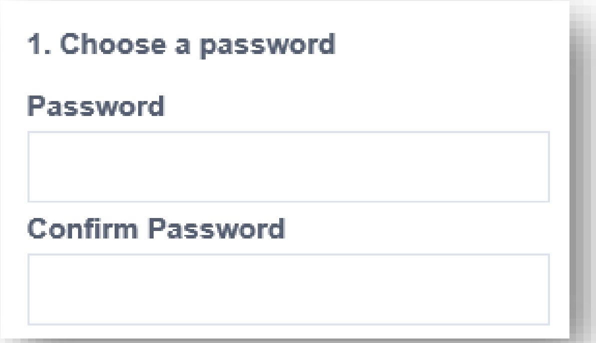
- Locate the email sent to you from no-reply@sailpoint.com
- Note your Username provided
- Select **Register Now**

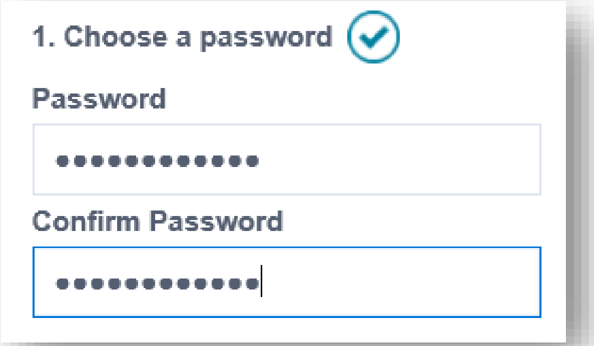


Single Sign-On Portal (SSO)

SETTING PERMANENT LOGIN CREDENTIALS

Step 1: Choose a Password





Password Requirements:

Your new password must meet the following requirements.

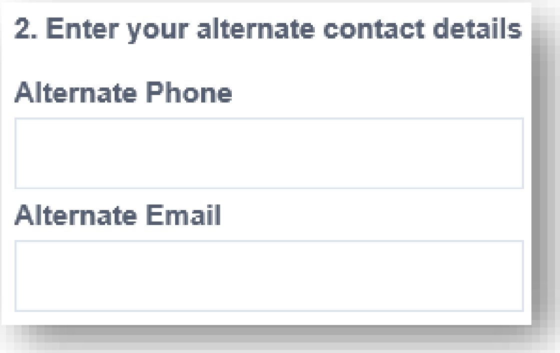
- Minimum characters: 8
- Minimum letters: 1
- Minimum uppercase: 1
- Minimum lowercase: 1
- Minimum digits: 1
- Minimum special characters: 1
- Cannot match any attribute of your identity
- Cannot match any attribute of your account

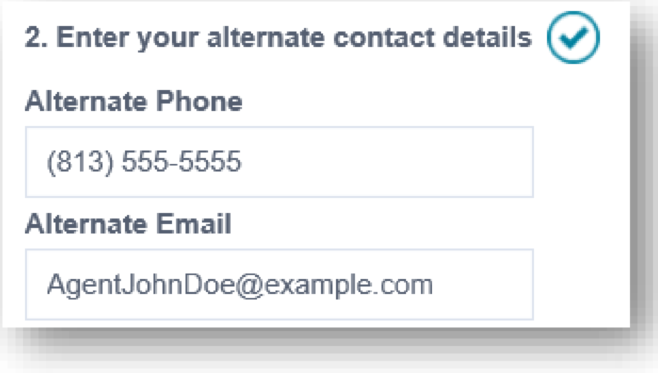
*If your password meets requirements and each entry matches, you will see the **check mark** next to CHOOSE A PASSWORD as shown on the left.*

Single Sign-On Portal (SSO)

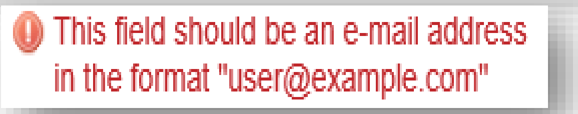
SETTING PERMANENT LOGIN CREDENTIALS

Step 2: Enter your alternate contact details





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

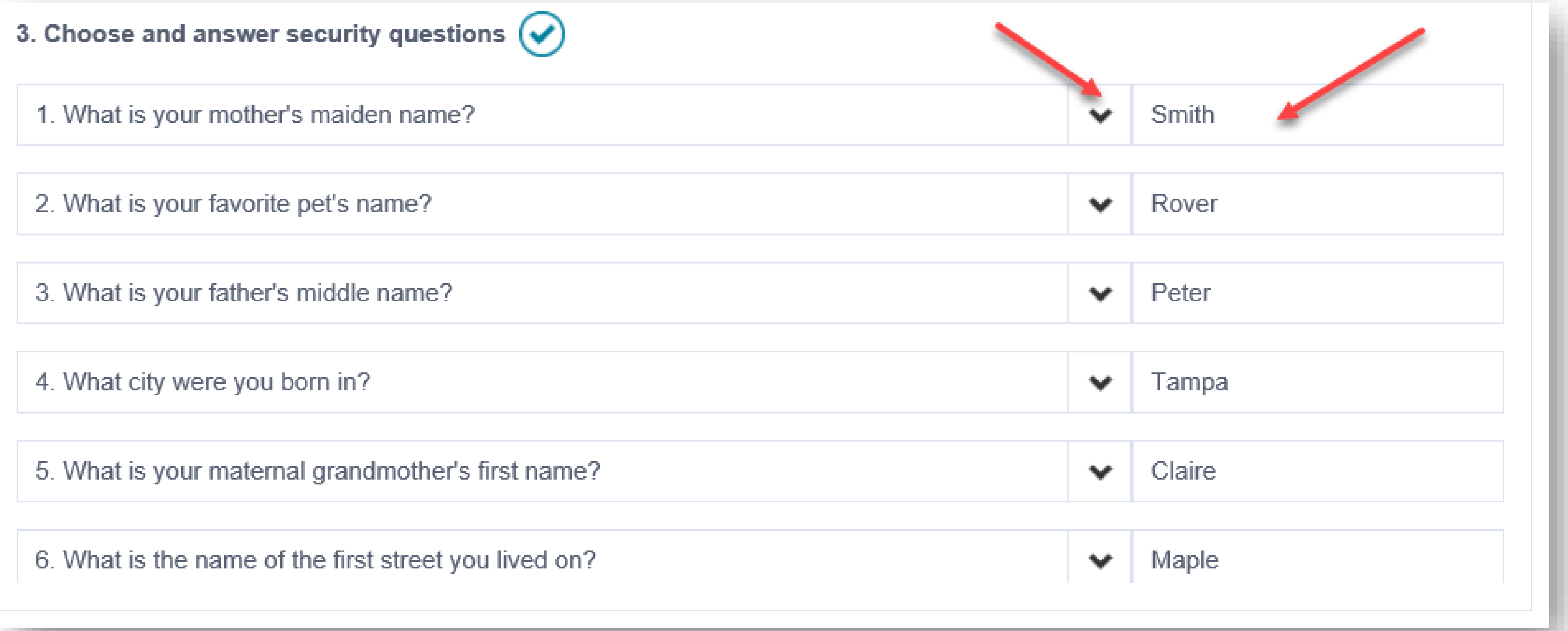


If your alternate phone and emails meet requirements, you will see the check mark next to ENTER YOUR ALTERNATE CONTACT DETAILS as shown on the left image.

Single Sign-On Portal (SSO)

SETTING PERMANENT LOGIN CREDENTIALS

Step 3: Choose and answer 6 security questions



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**

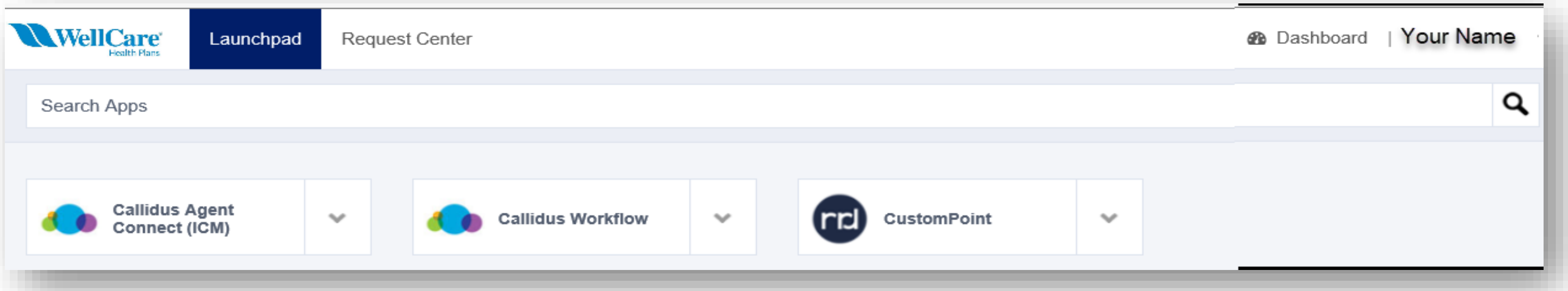
Single Sign-On Portal (SSO)

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 3 business days after all 2021 certification requirements are complete and Agent is Active Certified status

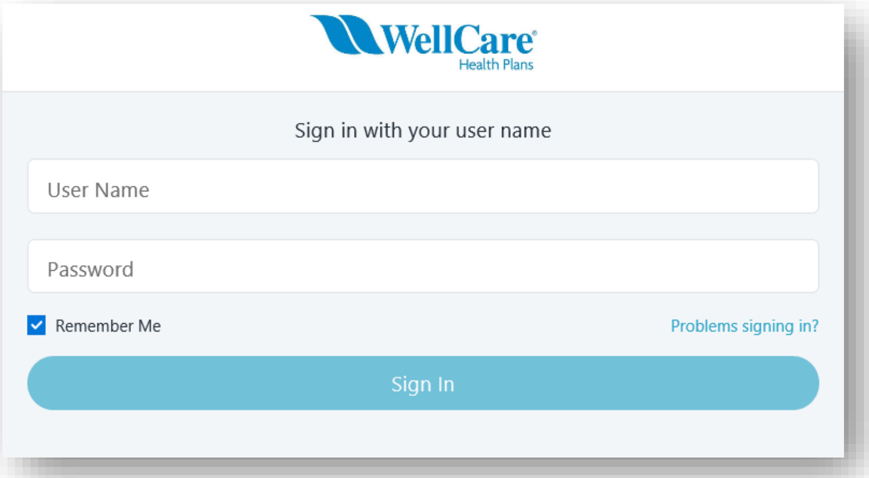
Single Sign-On Portal (SSO)

Option 2: 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?***



Single Sign-On Portal (SSO)

REGISTERING YOUR SINGLE SIGN-ON PORTAL

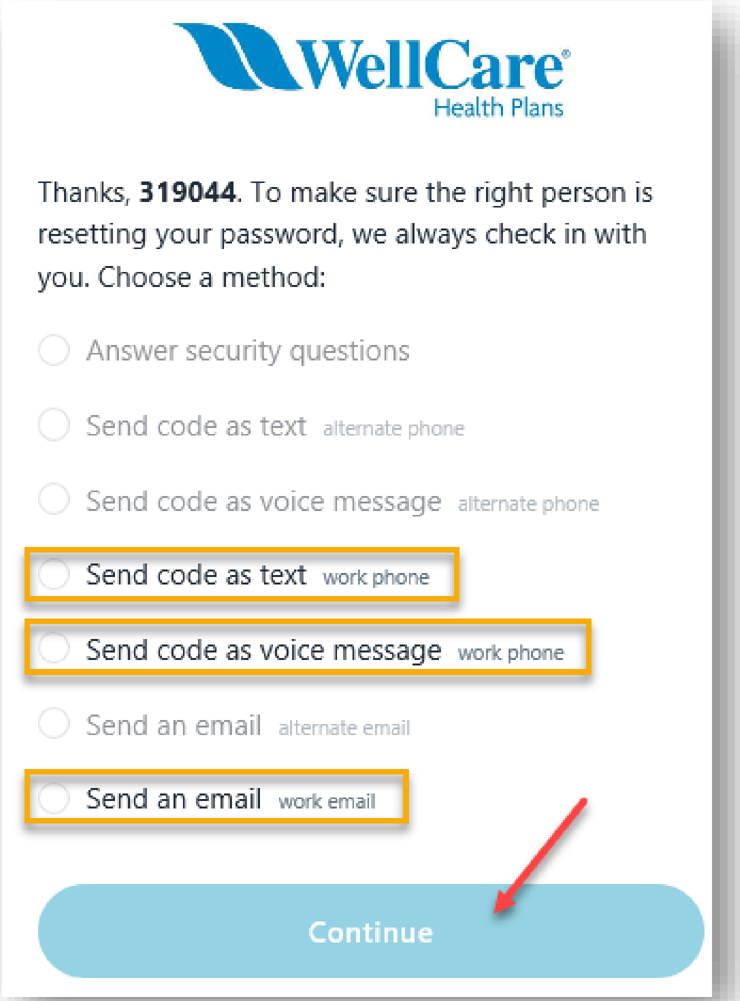
Step 3: Select **Reset Password**

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

Single Sign-On Portal (SSO)

REGISTERING YOUR SINGLE SIGN-ON PORTAL

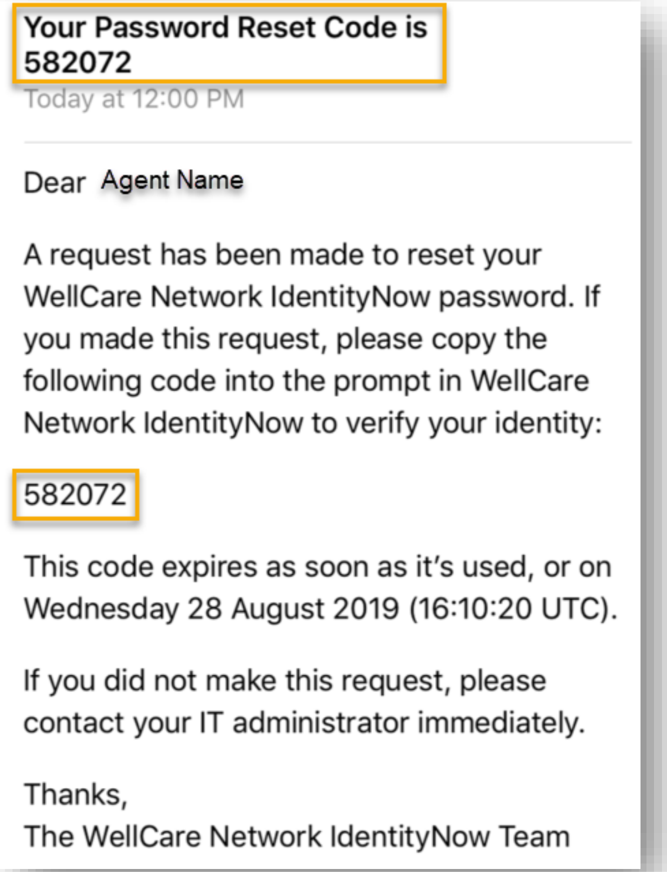
Step 5: Choose one of the three available options to receive the password reset code then select **Continue**



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.

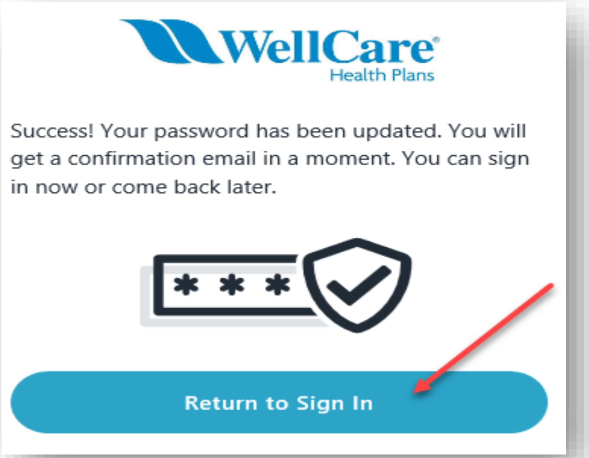
Thanks,
The WellCare Network IdentityNow Team

Single Sign-On Portal (SSO)

REGISTERING YOUR SINGLE SIGN-ON PORTAL

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

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



*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.*

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.

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

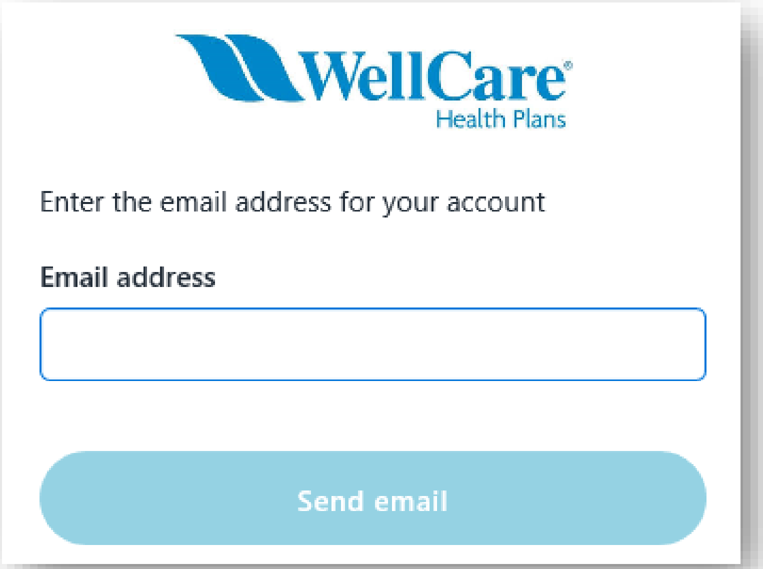
3. Unlock Account

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.

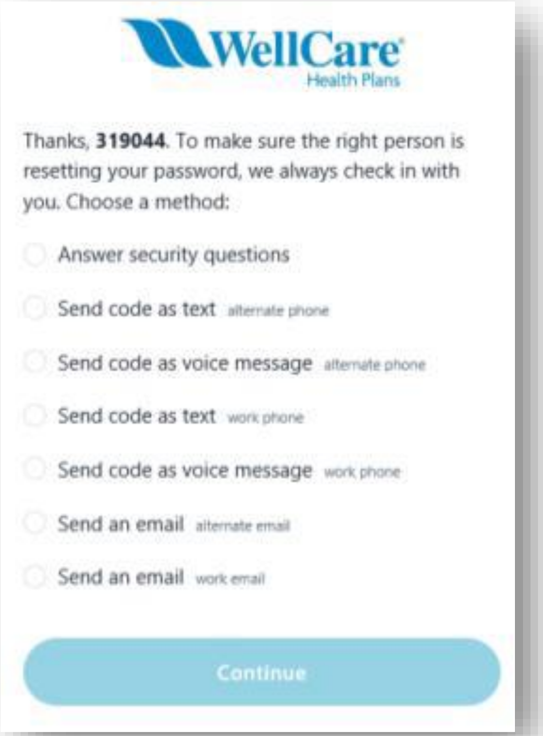


Single Sign-On Portal (SSO)

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.

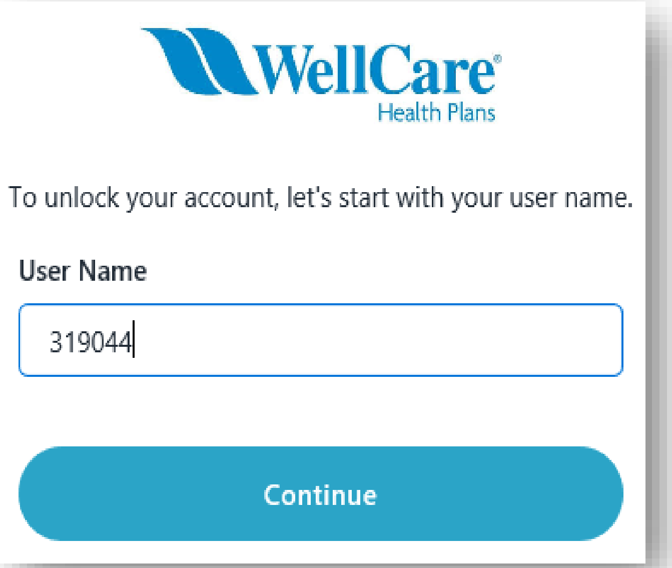


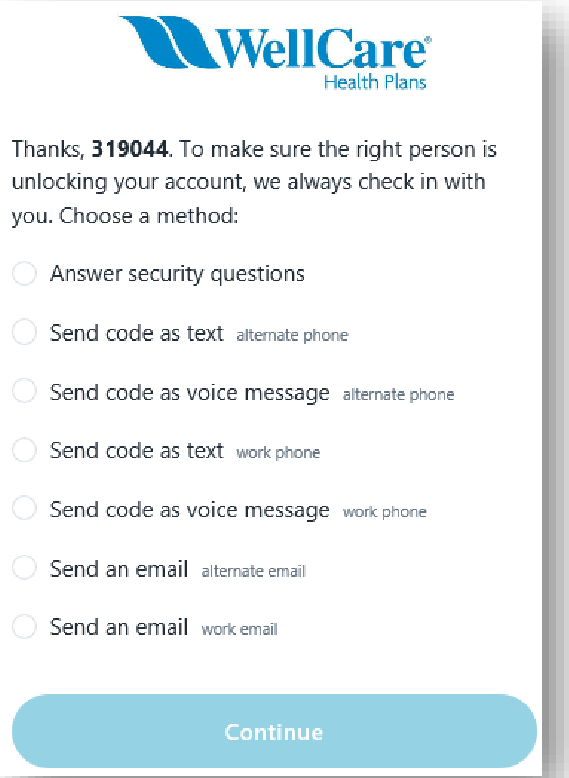
Single Sign-On Portal (SSO)

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.





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

Single Sign-On Portal (SSO)

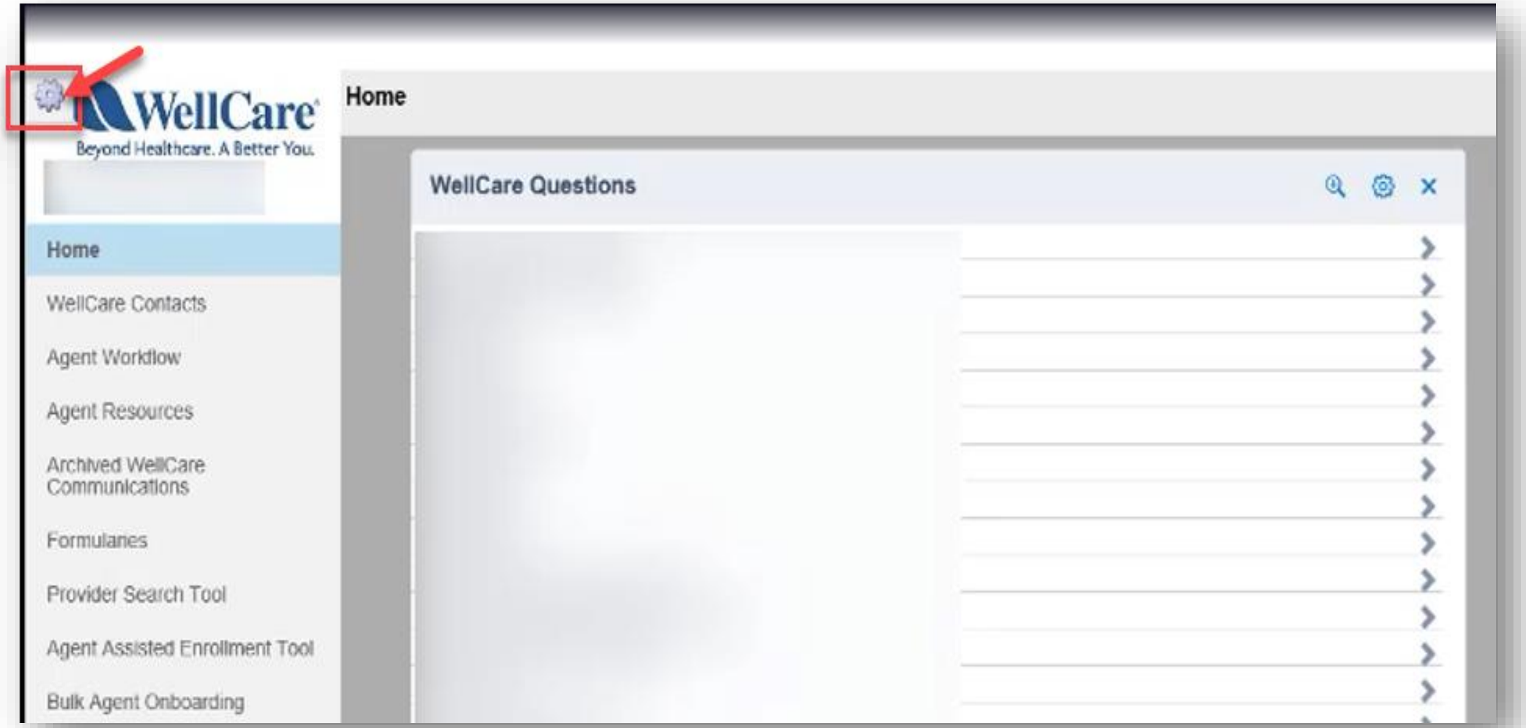
AGENT CONNECT LOGIN & SWITCH CAPABILITY TO VIEW AS AGENCY PRINCIPAL

Principal Agents 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.

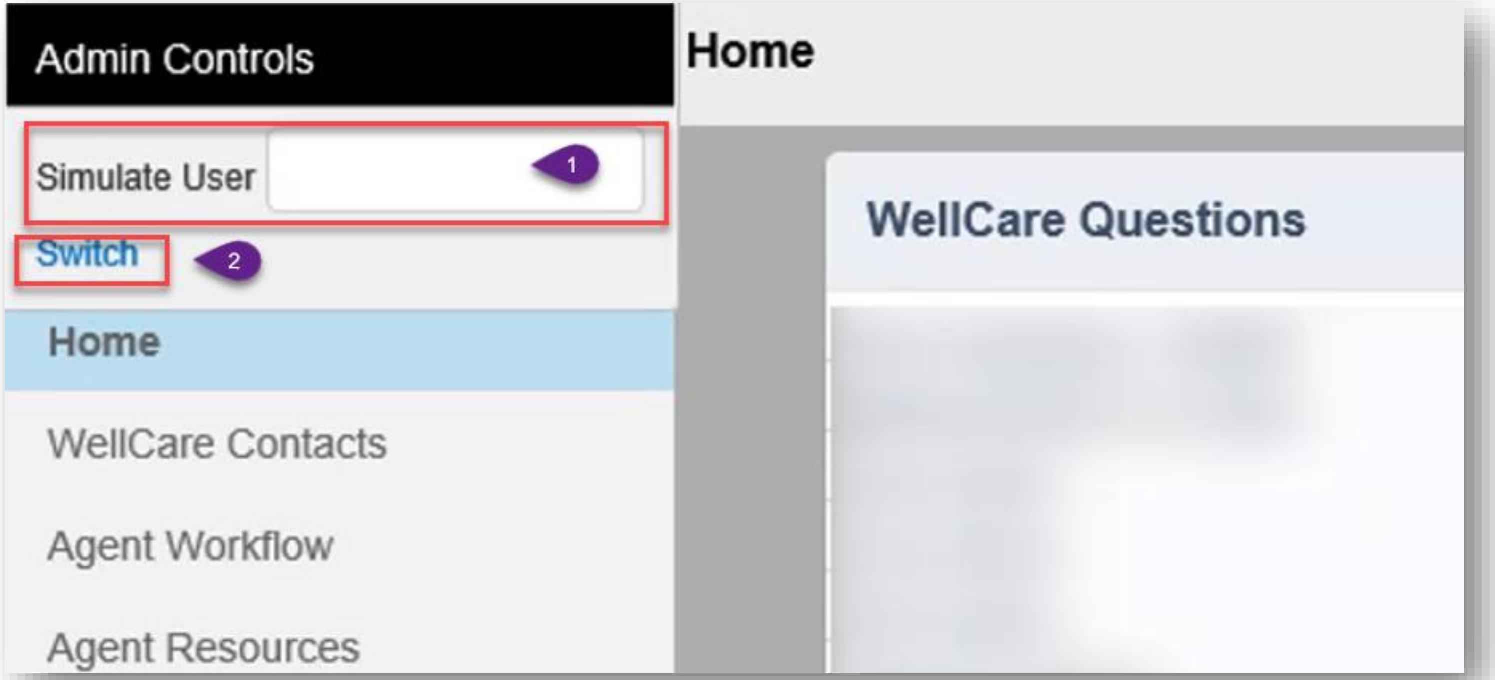
NOTE: Only Principal Agents have this ability. Downline Agents do not.



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 Agents have this ability. Downline Agents do not.

Single Sign-On Portal (SSO)

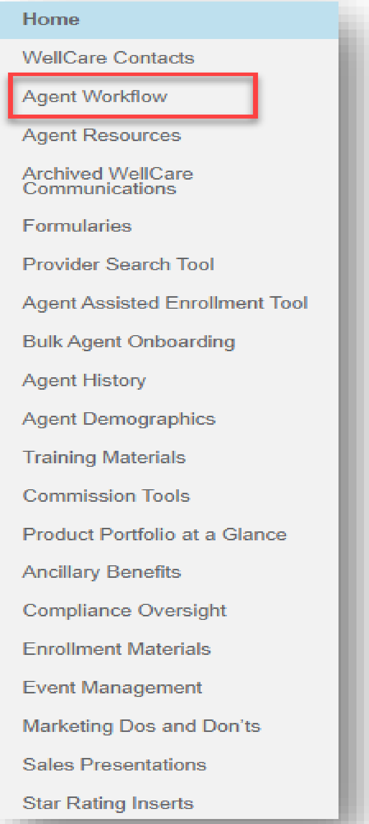
FUTURE RELEASE: Access to Agent Workflow will be available in the Phase 3 Single Sign-On release!

LOGIN TO AGENT WORKFLOW

New Agents: Login to Agent Workflow from your portal homepage with your Login name (email) and initial temporary password provided to you to make changes to your Agent profile.

Existing Agents: Use your current Login name (email) and password.

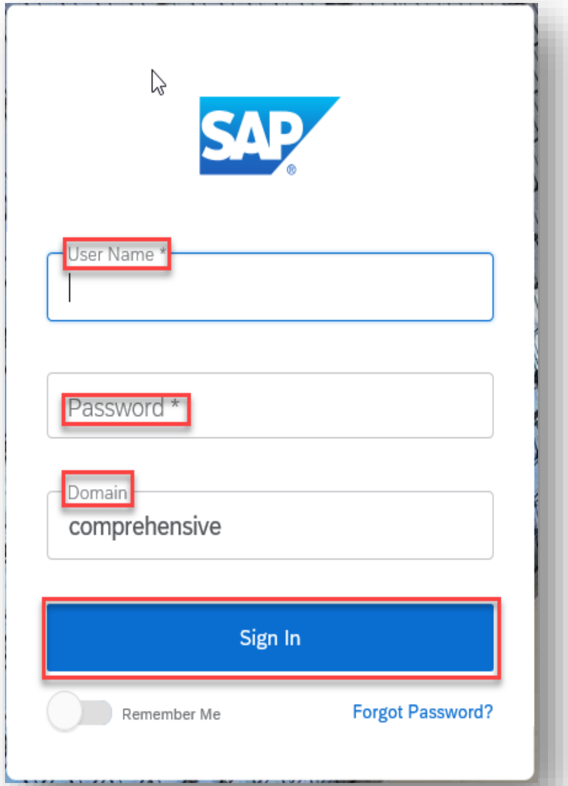
Step 1: Select **Agent Workflow** from the left menu within your Agent Connect profile.



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

NOTE: User Name and Password are case-sensitive.

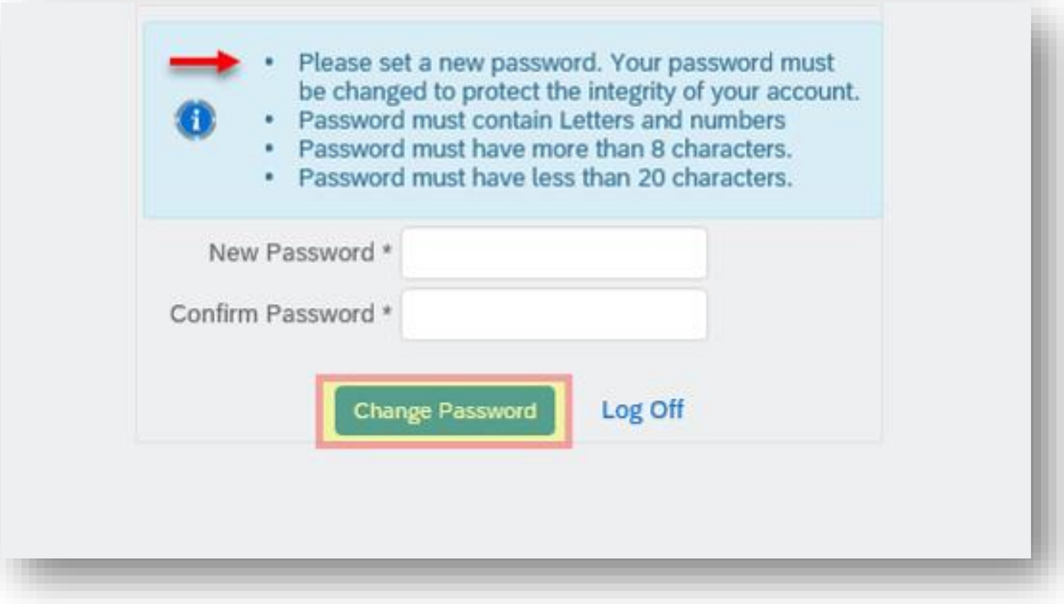
Domain name is **COMPREHENSIVE**



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

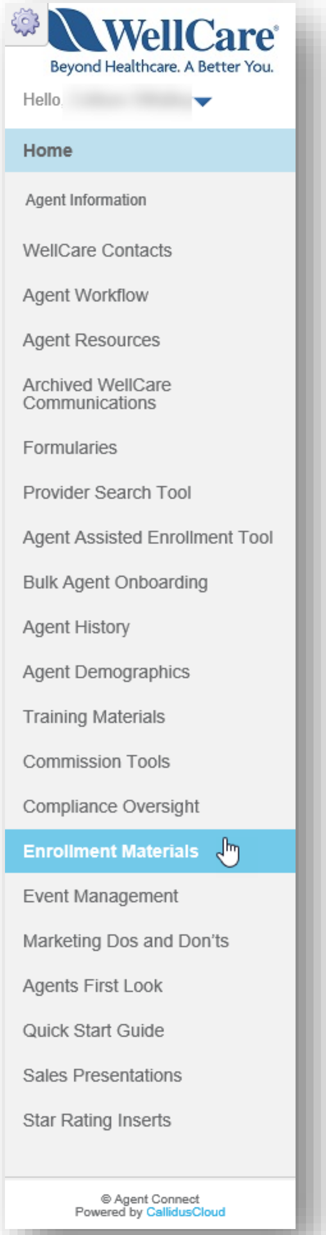
AGENT MATERIALS

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

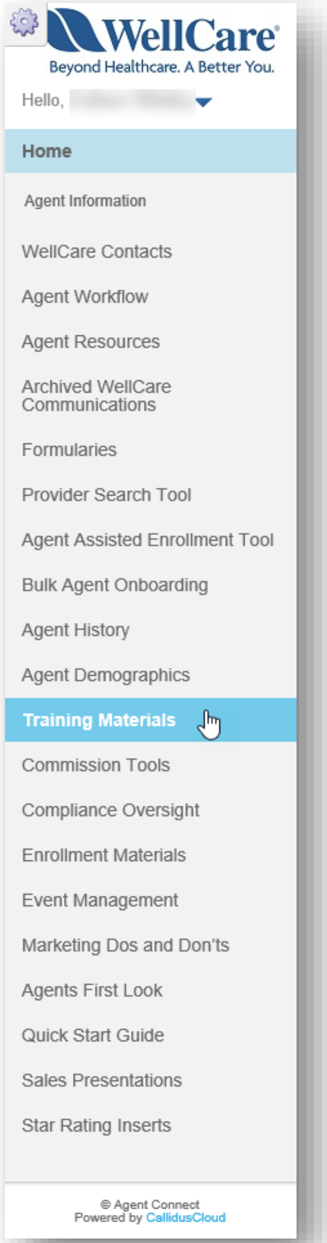
LOCATING TRAINING DOCUMENTS AND OTHER USEFUL GUIDES IN AGENT CONNECT

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!



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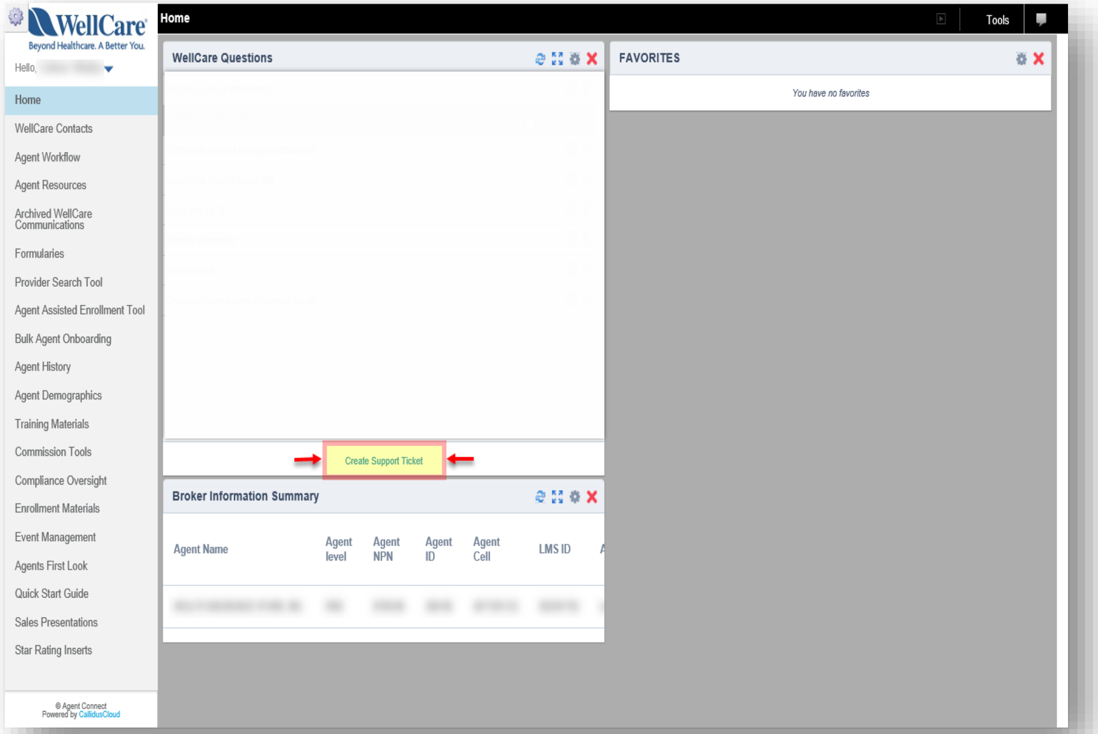
AGENT CONNECT USER GUIDE

CREATING SUPPORT TICKETS

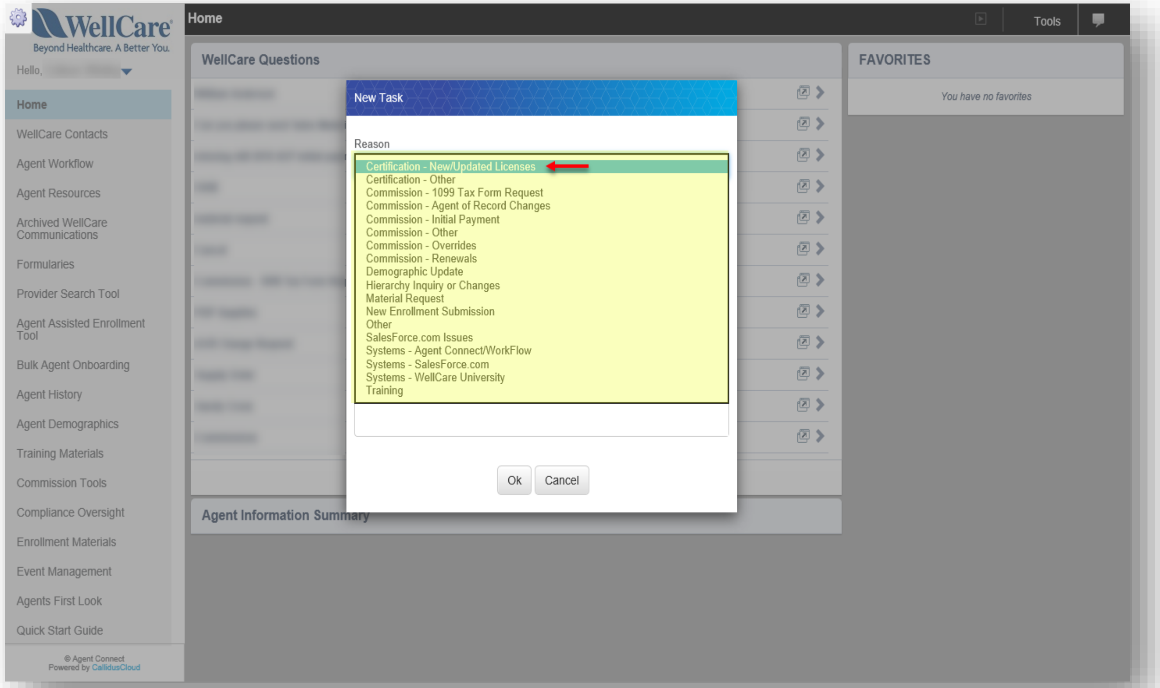
CREATING SUPPORT TICKETS

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**.



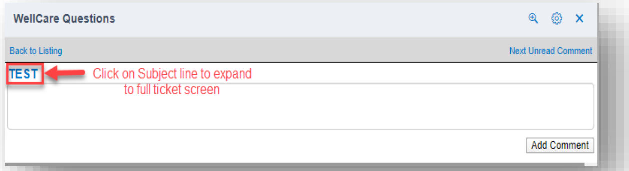
CREATING SUPPORT TICKETS

CREATING SUPPORT TICKET IN AGENT CONNECT PORTAL

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

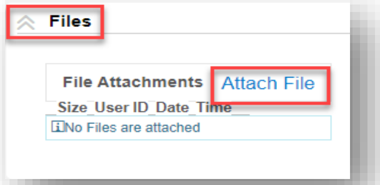
Step 1: Click the **boxed arrow** symbol to the right of the subject line, after you have submitted the ticket

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



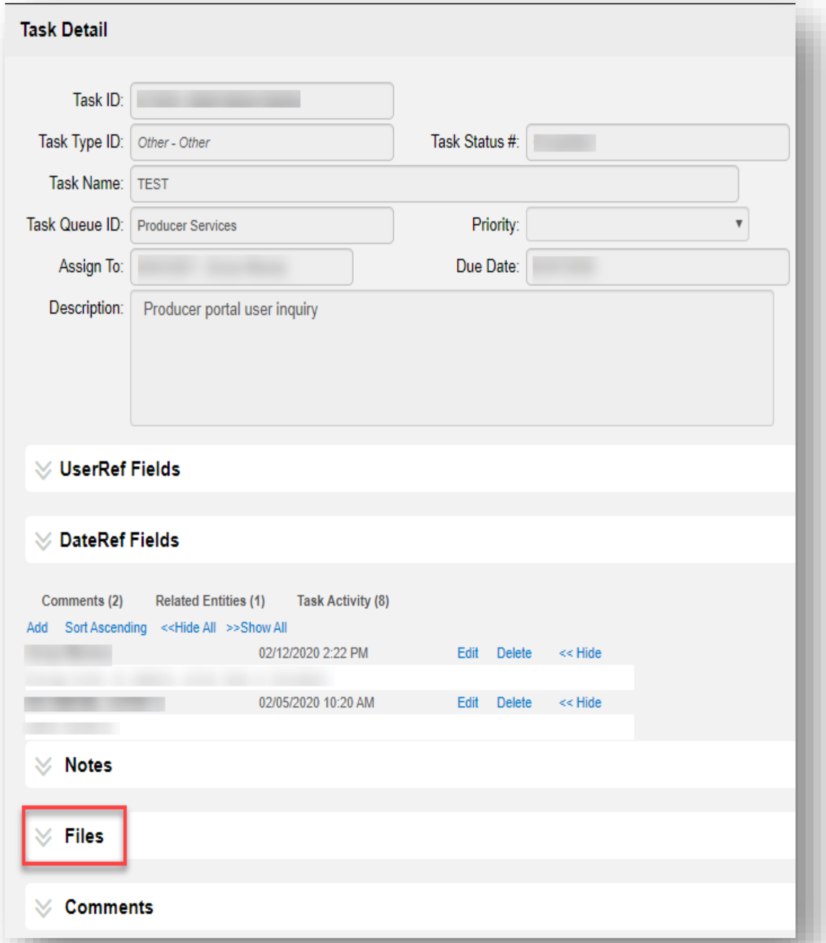
Step 3: A new window with your previously submitted ticket will open. Scroll to the bottom of the window, and click the arrows to the left of the word **Files**

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**

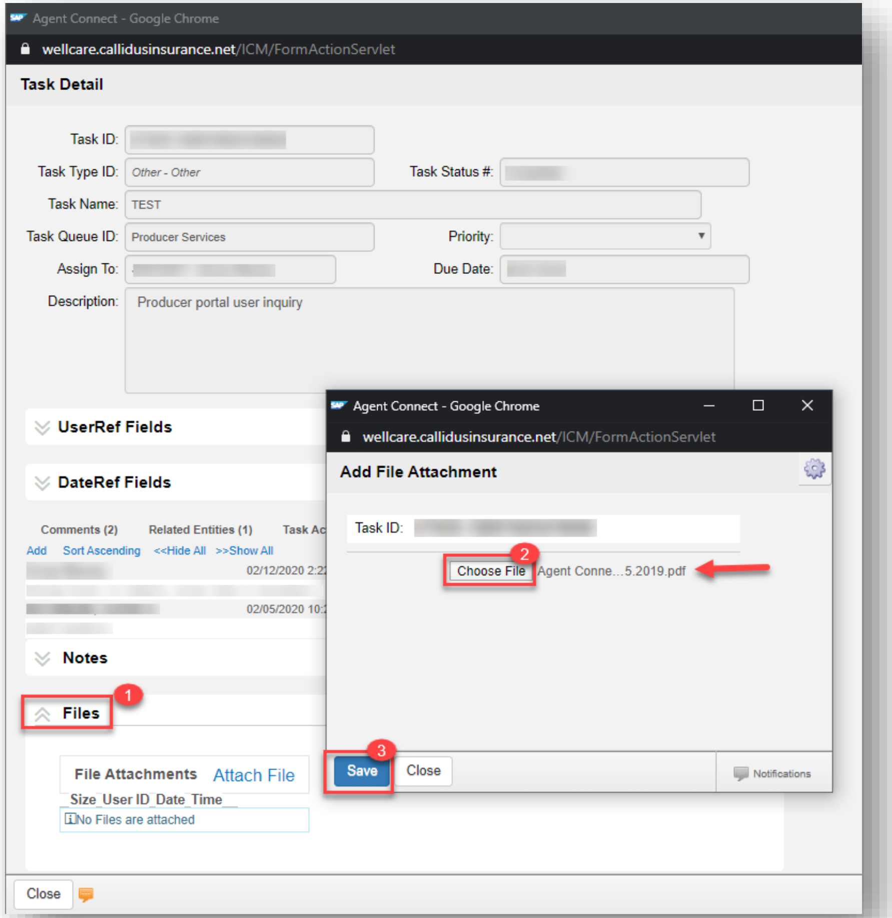


CREATING SUPPORT TICKETS

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.

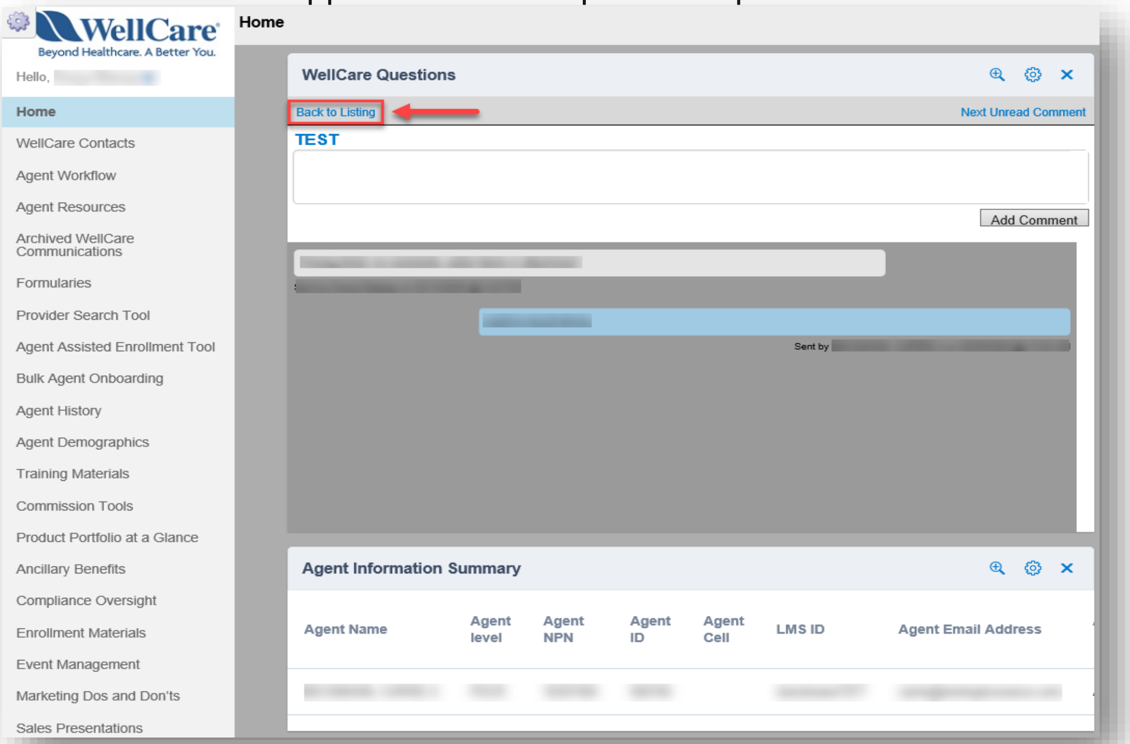


CREATING SUPPORT TICKETS

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 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.



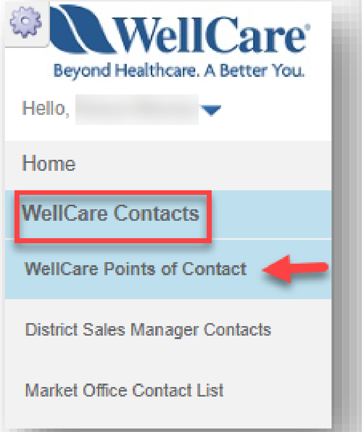
AGENT CONNECT USER GUIDE

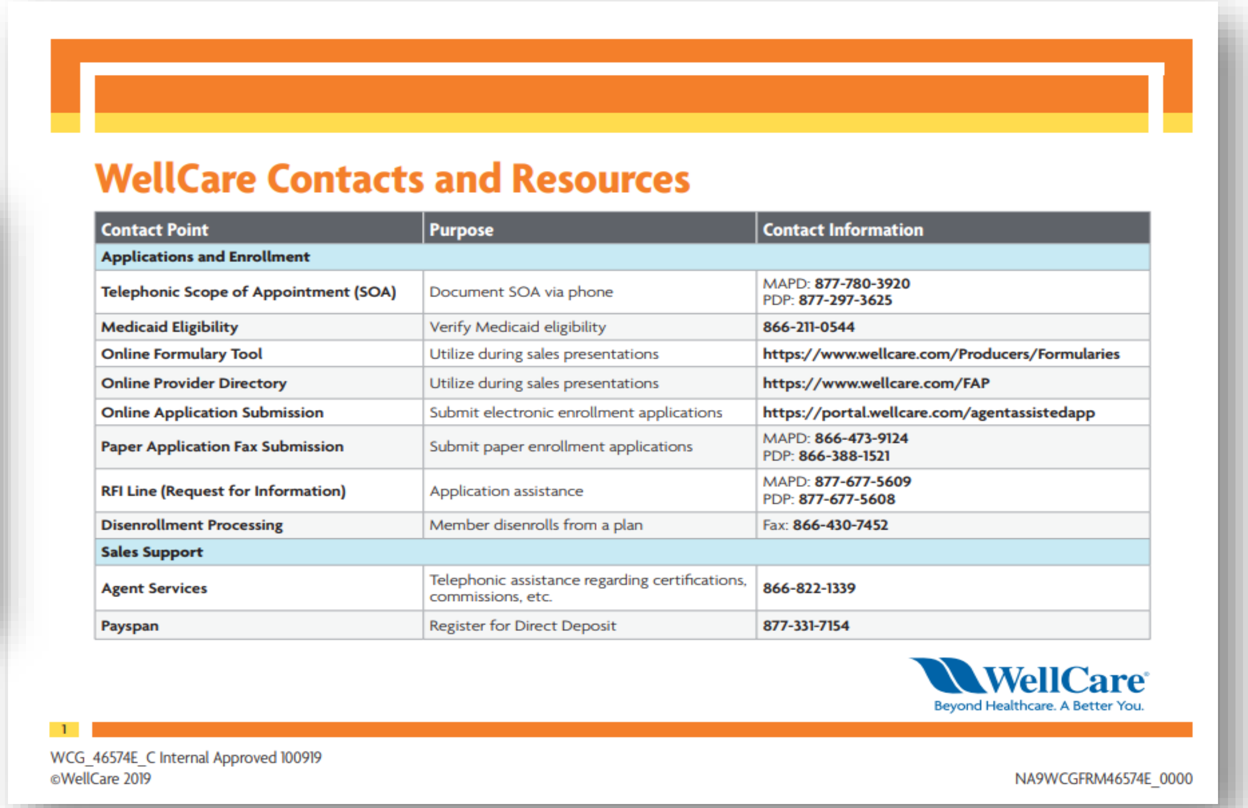
IMPORTANT CONTACTS

IMPORTANT CONTACTS

WELLCARE CONTACTS AND RESOURCES

Step 1: Login to Agent Connect, select **WellCare Contacts** located on the left menu. Now 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.

1

WCG_46574E_C Internal Approved 100919
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NA9WCGFRM46574E_0000

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

IMPORTANT CONTACTS

DISTRICT SALES MANAGER CONTACTS

Step 1: Login to Agent Connect, select **WellCare Contacts** located on the left menu. Now select **District Sales Manager Contacts** to view list.

This is a 2 page PDF document that you can download for quick reference!

District Sales Managers

Revised 9/18/19

WellCare
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State	Location	District Sales Manager	Phone	Email
All PDP	PDP	Agent Support	1-866-822-1339	N/A
AR	Arkansas	Christina Lovell	501-221-5228	christina.lovell@wellcare.com
AL	Alabama	Van Davis	601-397-7470	van.davis@wellcare.com
AZ	Arizona	Felipe Valdez	480-518-7640	fvaldez@care1staz.com
CA	Los Angeles	Sandra Villalba	657-465-2285	sandra.villalba@wellcare.com
CA	Los Angeles	Sandra Villalba	657-465-2285	sandra.villalba@wellcare.com
CA	Inland Empire/San Bernardino	Dale Washington	714-686-7602	dale.washington@wellcare.com
CA	Orange County	Jan Walsh	657-337-6120	jan.walsh@wellcare.com
CT	Connecticut	Elliott Wangaard	203-535-2510	elliott.wangaard@wellcare.com
FL	Orlando/Central Florida/Jacksonville	Glenda Martinez	407-782-7977	glenda.martinez@wellcare.com
FL	Orlando/Central Florida/Jacksonville	Daniel Maldonado Vazquez	407-619-1590	daniel.maldonadovazquez@wellcare.com
FL	South Florida	Angelica Velasco	305-206-2825	angelica.velasco@wellcare.com
FL	West Florida/Pensacola/Tallahassee	Ted Libernini	813-390-9416	ted.libernini@wellcare.com
GA	Central Georgia (Columbus / Macon)	Devin Stanley	404-430-3979	devin.stanley@wellcare.com
GA	Georgia East (Savannah / Augusta)	Lacey Owens	470-322-0851	lacey.owens@wellcare.com
GA	North Georgia (Atlanta)	Laura Mager	770-241-0509	laura.mager@wellcare.com
HI	Hawaii	Jessica Lau	808-351-7218	jessica.langaman@wellcare.com
IL	Illinois	Jason Herrington	312-813-4018	jason.herrington@wellcare.com
IN	Indiana	Jason Herrington	312-813-4018	jason.herrington@wellcare.com
KY	Kentucky	Kimberly Scott	859-512-7857	kimberly.scott2@wellcare.com
LA	Louisiana	Gary Prechter	225-223-8051	gary.prechter@wellcare.com
ME	Maine	James Ball	207-272-4859	james.ball@wellcare.com

CENTENE Corporation

AGENT CONNECT USER GUIDE

MEMBER APPLICATION TRACKING

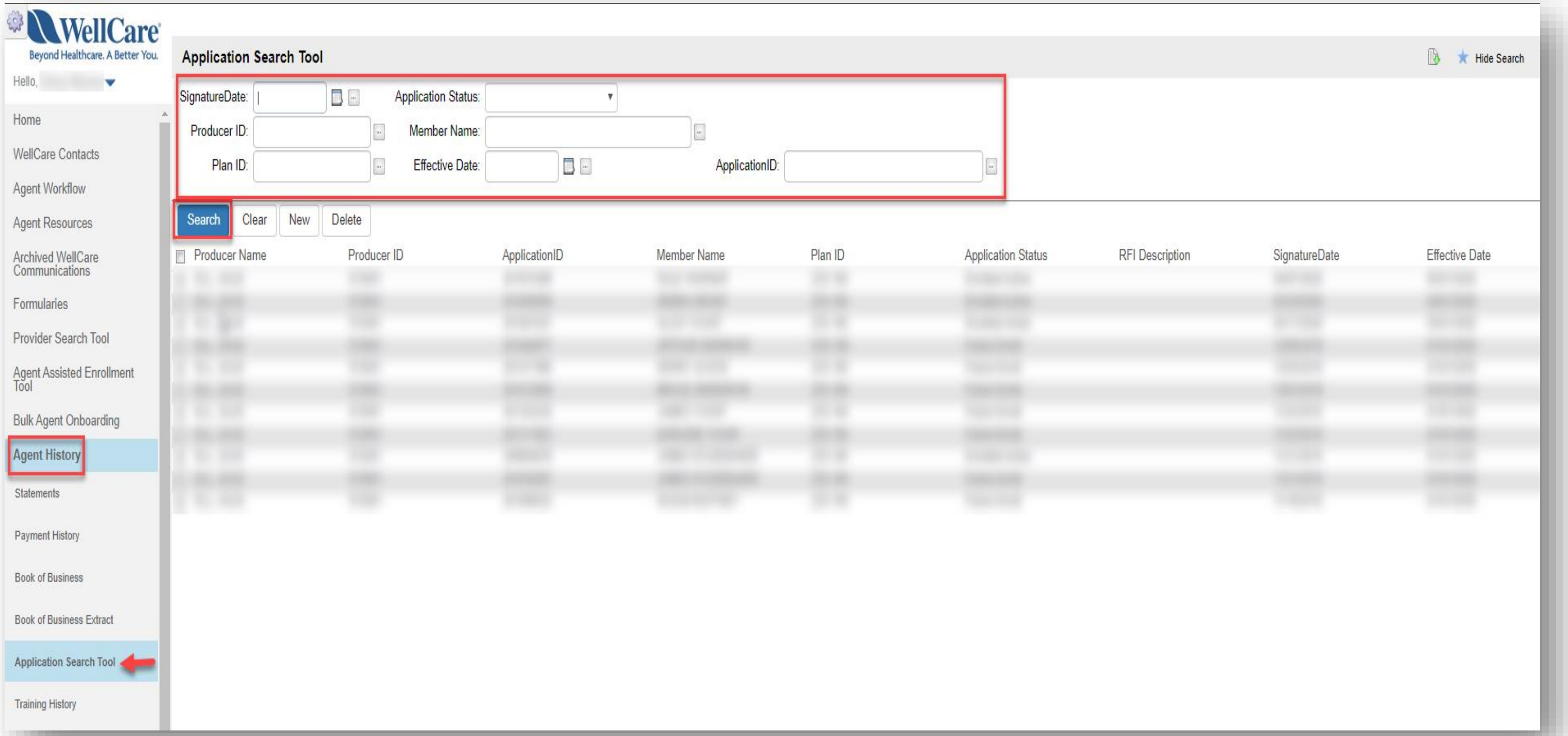
MEMBER APPLICATION TRACKING

TRACKING NEW MEMBER APPLICATION SUBMISSION USING APPLICATION SEARCH TOOL

The Application Search Tool is designed to assist the Agent 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**



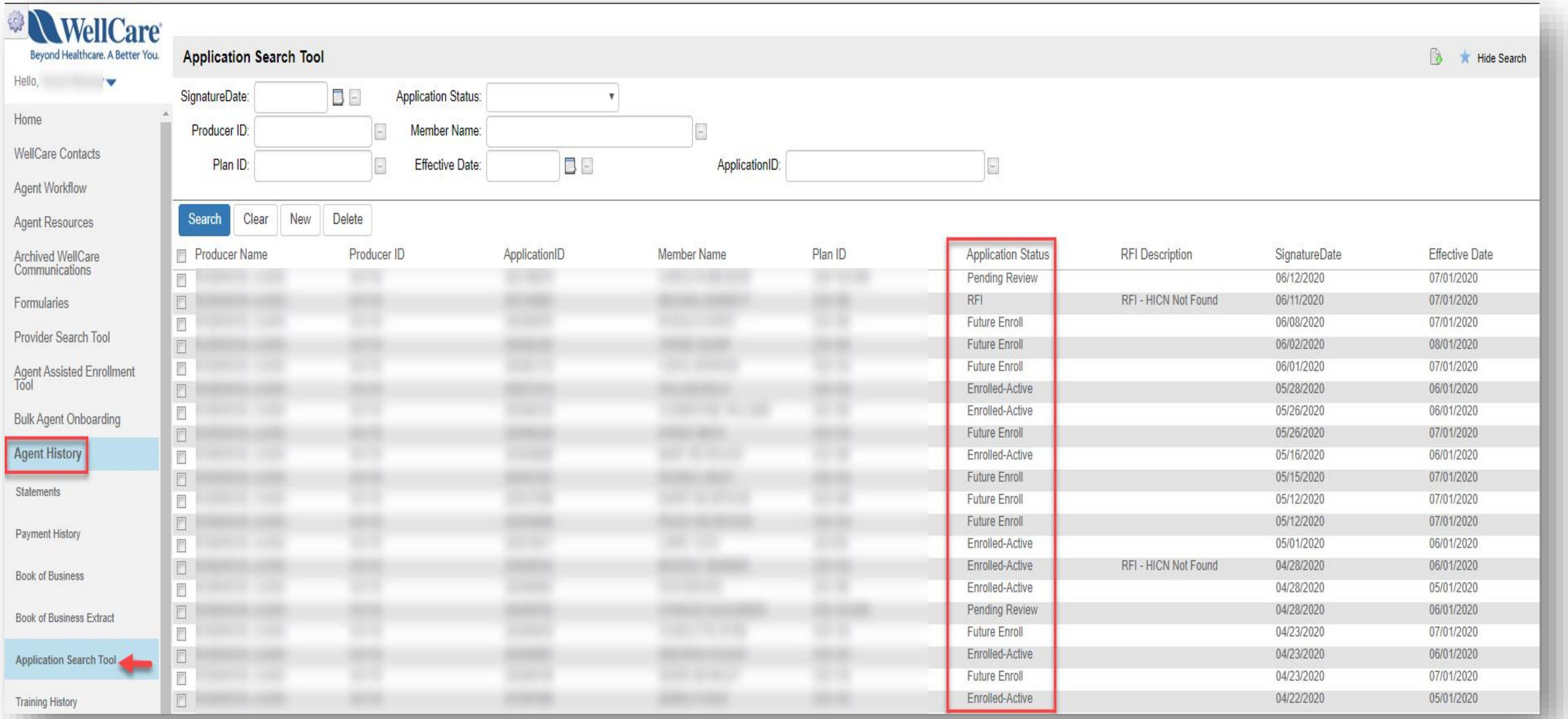
MEMBER APPLICATION TRACKING

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

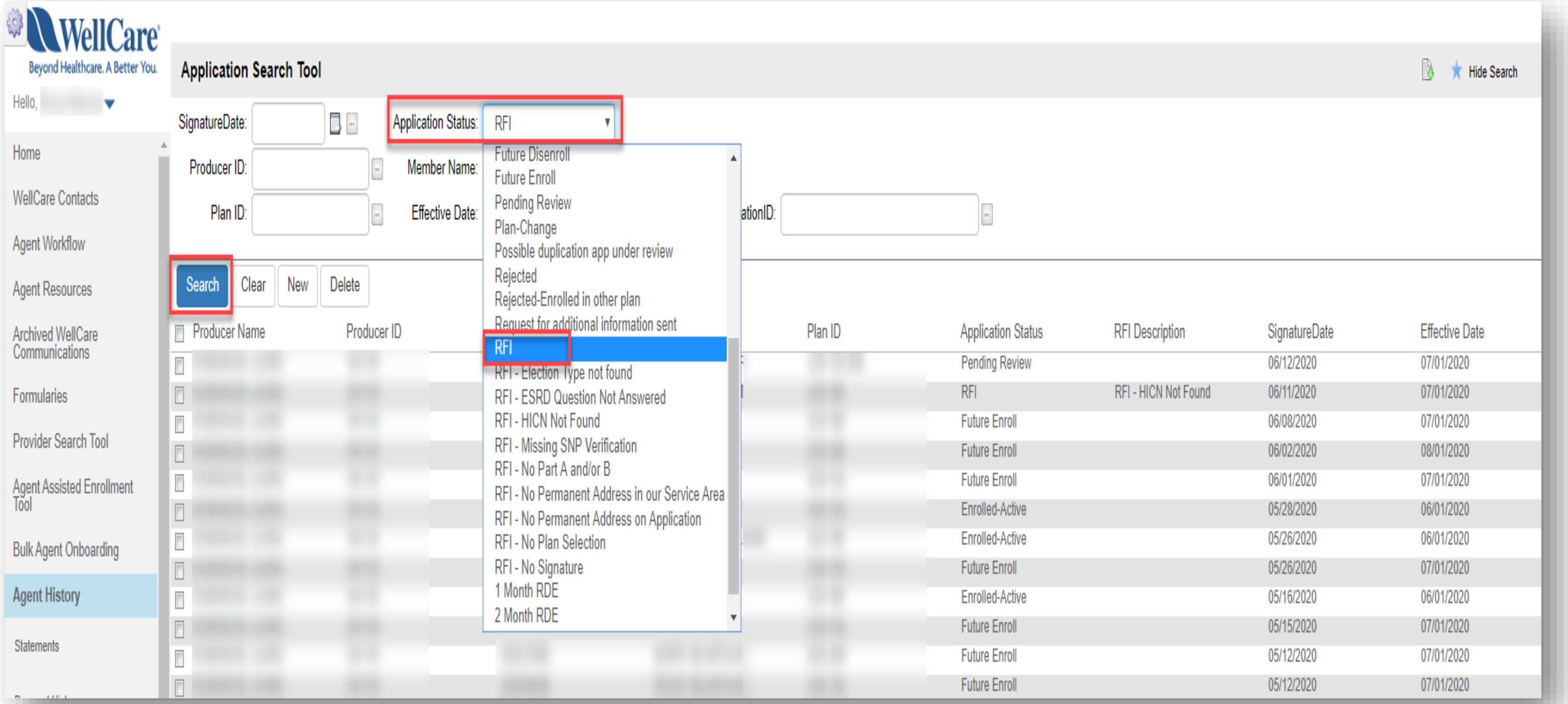
LOCATING & RESOLVING MEMBER APPLICATION THAT IS IN RFI STATUS

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)

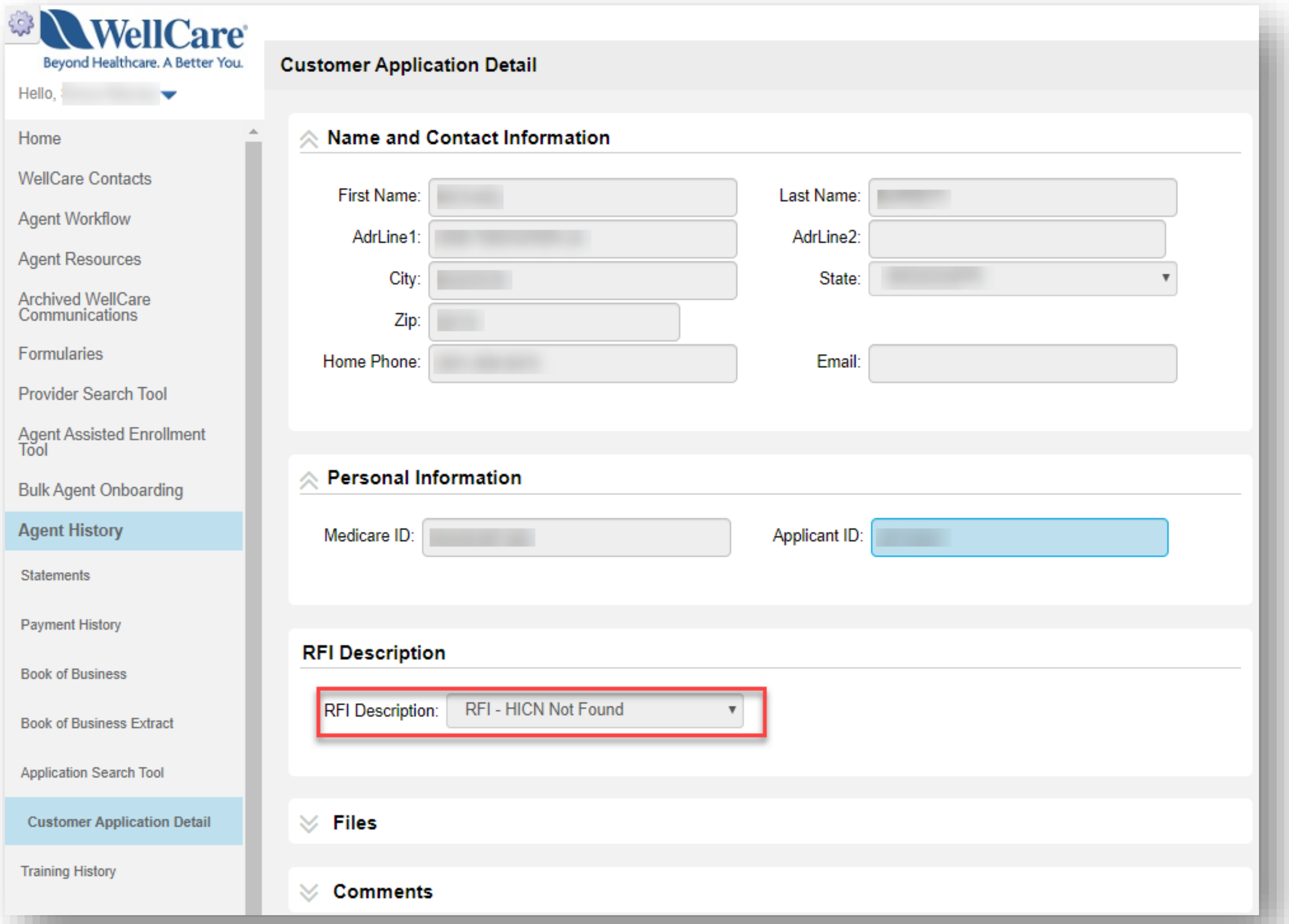
Step 4: Once on the Customer Application Detail screen, scroll down to the **RFI Description** section, view the RFI Description field, this will identify the reason the application is in RFI status.

Step 5: If you would like assistance with resolving the issue(s) for this member, **contact the RFI line** to speak with a live agent:

PDP: (877)677-5608

MA/MAPD: (877)677-5609

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



CENTENE Corporation

AGENT CONNECT USER GUIDE

COMMISSIONS

COMMISSIONS

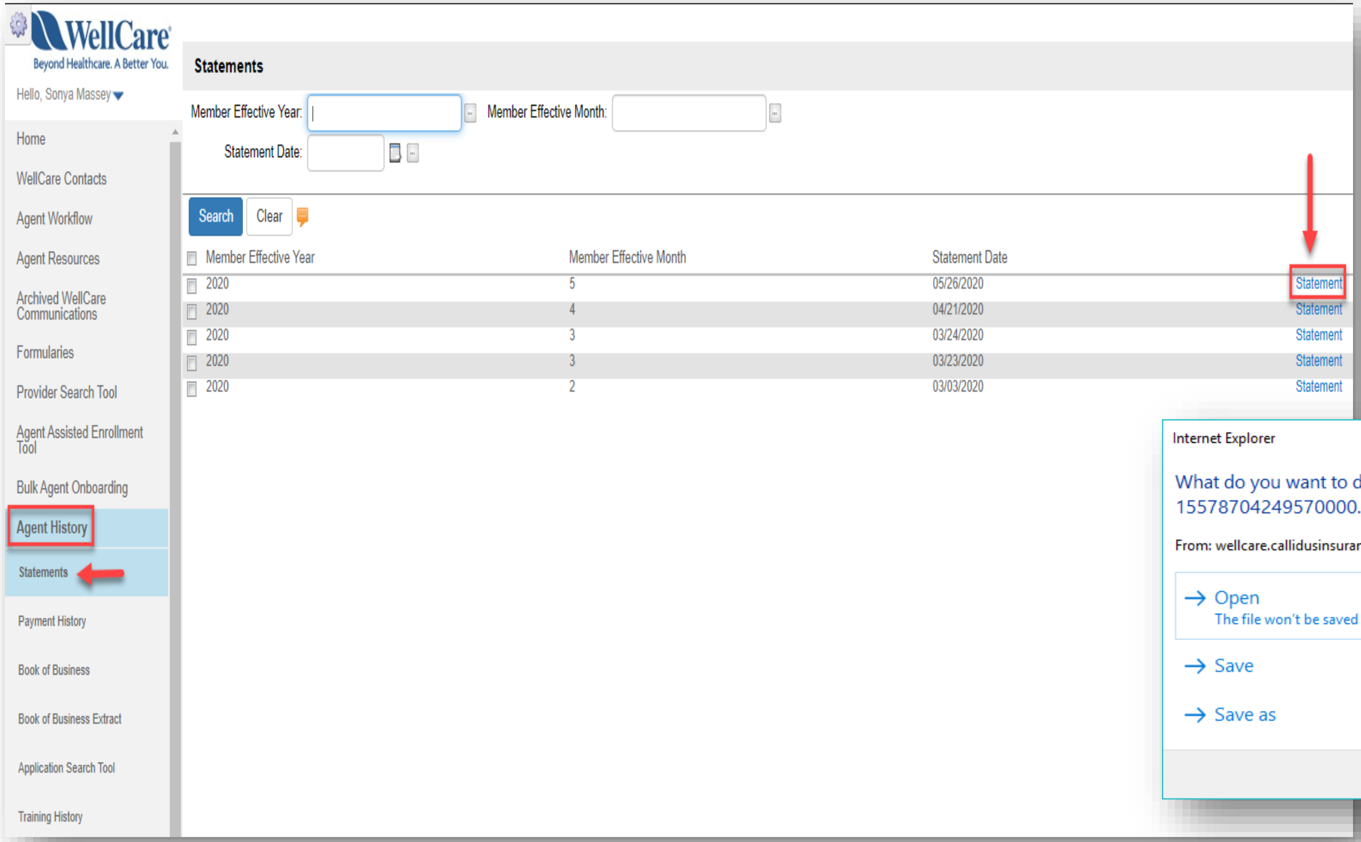
LOCATING & DOWNLOADING COMMISSION STATEMENTS

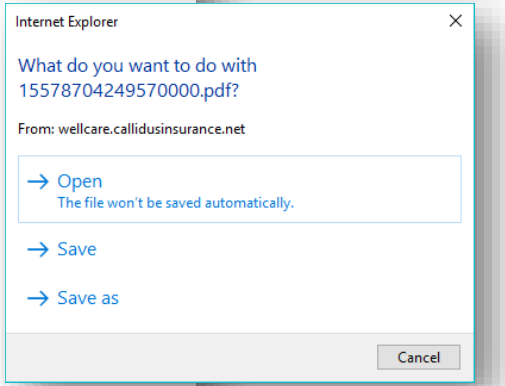
Within the Agent History tab in Agent Connect you have the ability to download your **Commission Statements**. Take the following steps to export:

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.





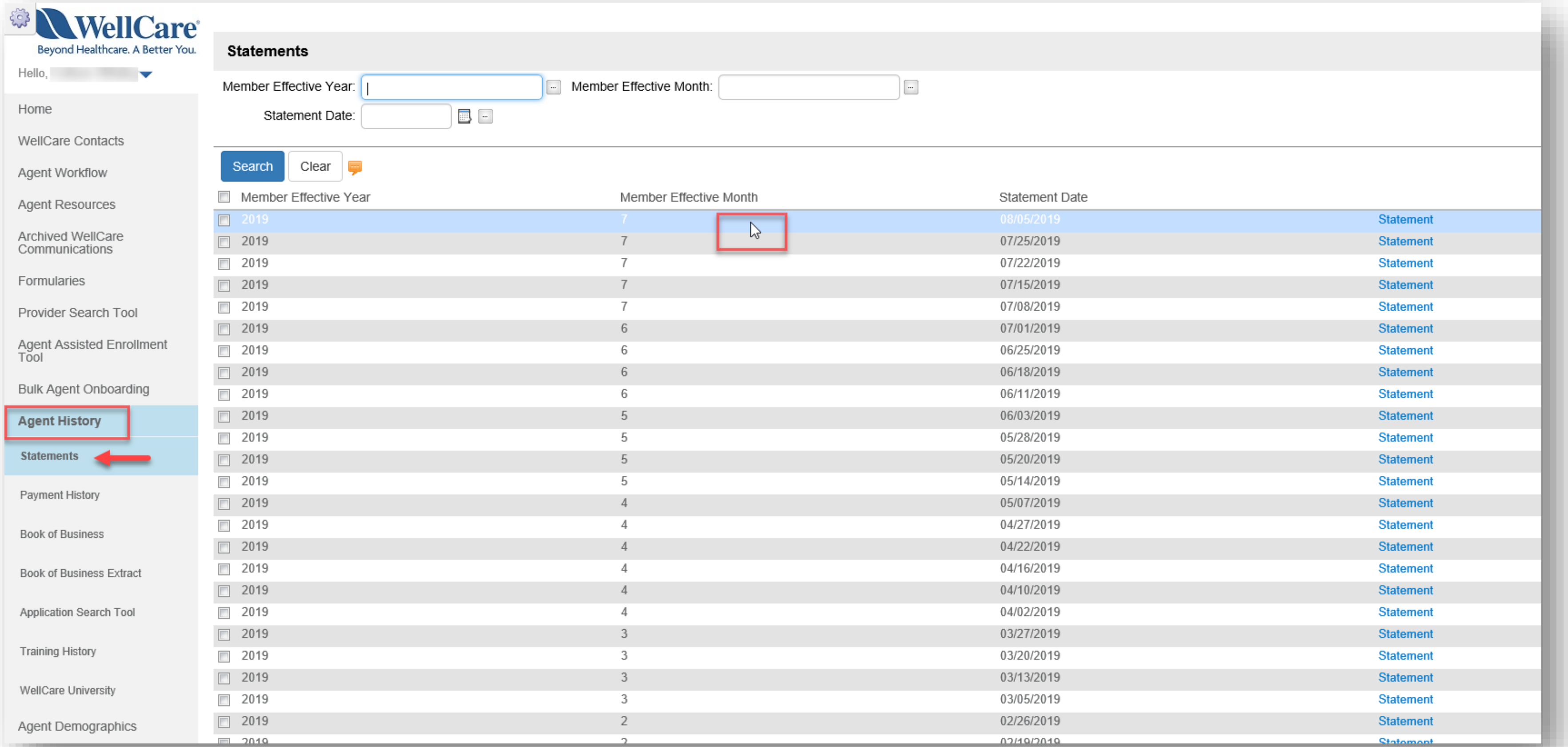
COMMISSIONS

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.

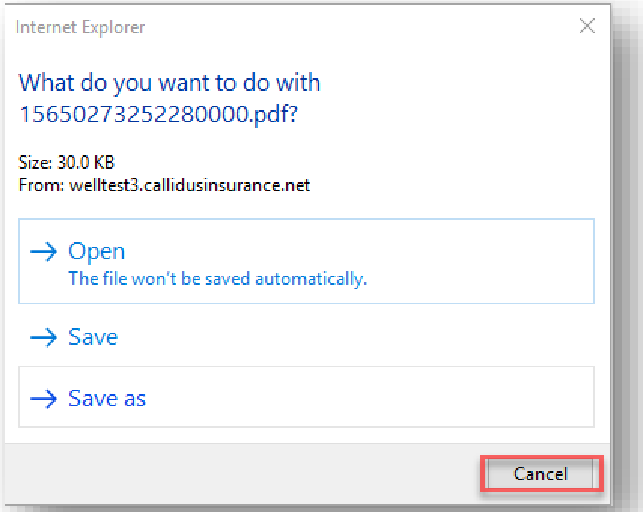
Click on the <u>**row**</u> of the Statement you would like to extract.



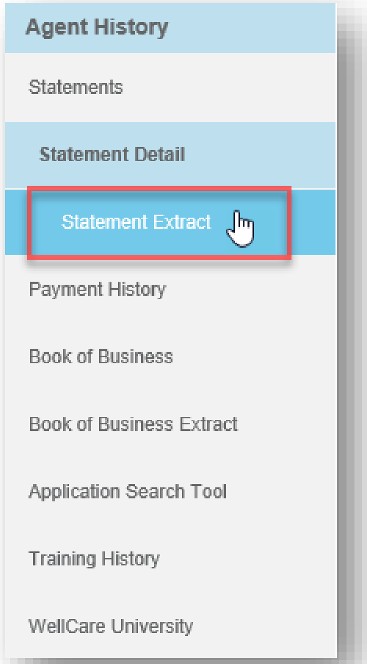
COMMISSIONS

DOWNLOADING STATEMENT EXTRACT

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



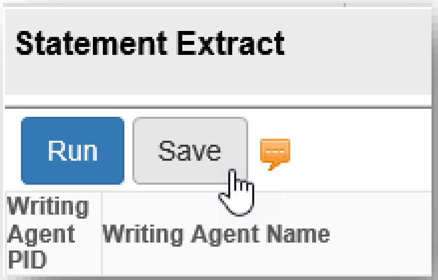
Step 3: A Statement Extract sub- tab will appear. Click **Statement Extract.**

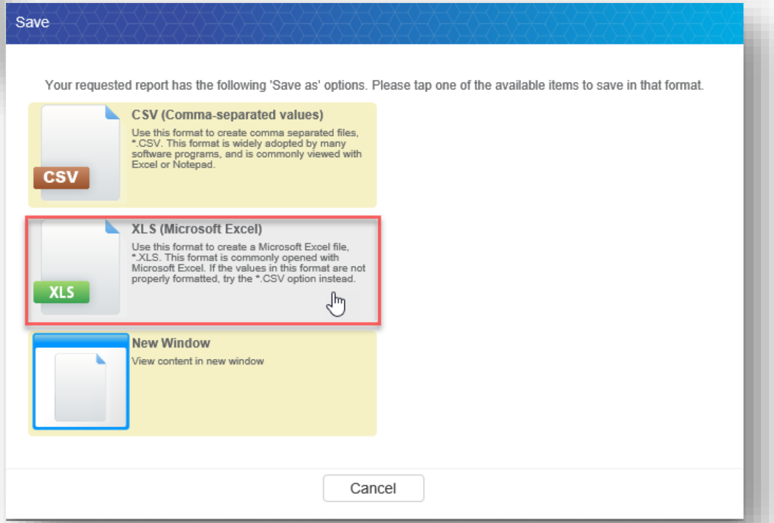


COMMISSIONS

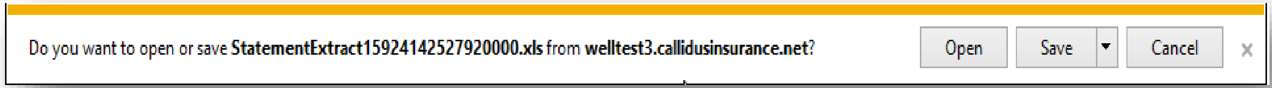
DOWNLOADING STATEMENT EXTRACT

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.

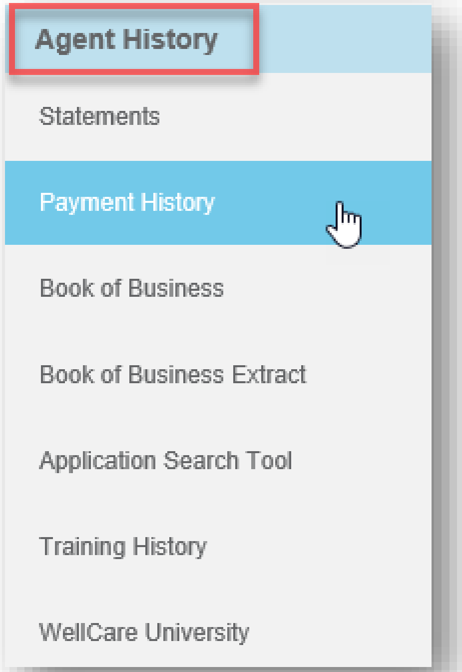


COMMISSIONS

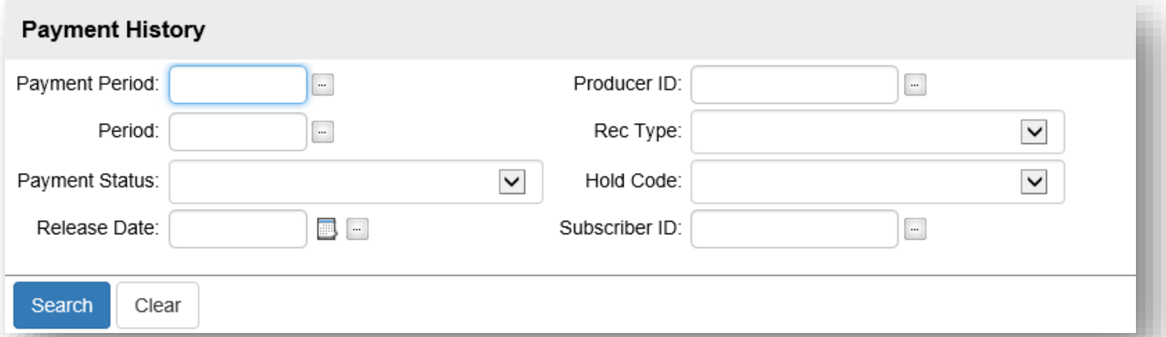
VIEWING PAYMENT HISTORY

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.



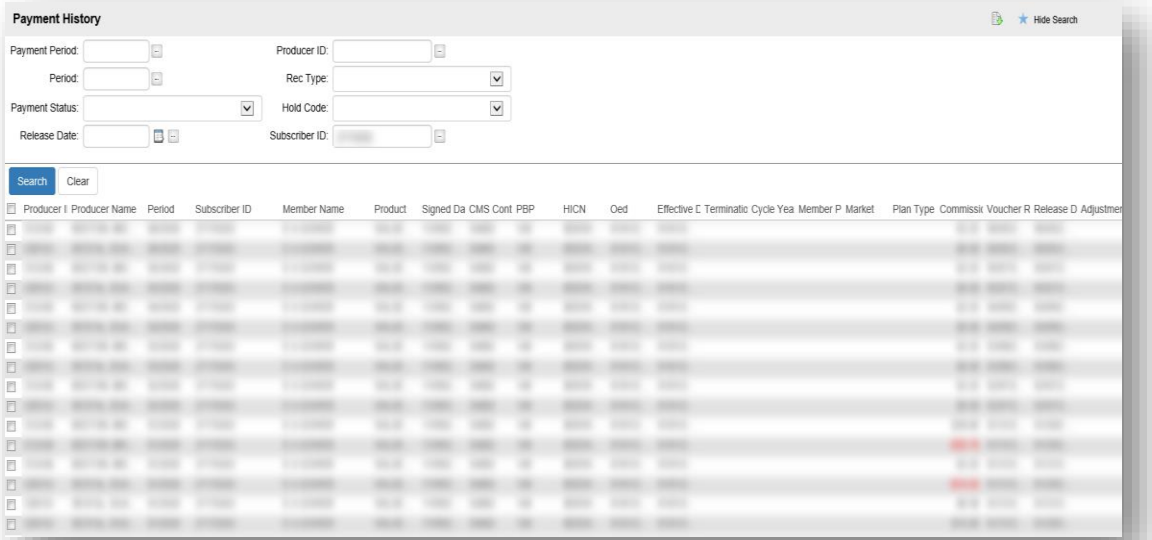
Step 2: Refine your search by using the available search fields (Ex: Enter a Subscriber ID to locate all transactions relating to a specific member). **Click Search.**



COMMISSIONS

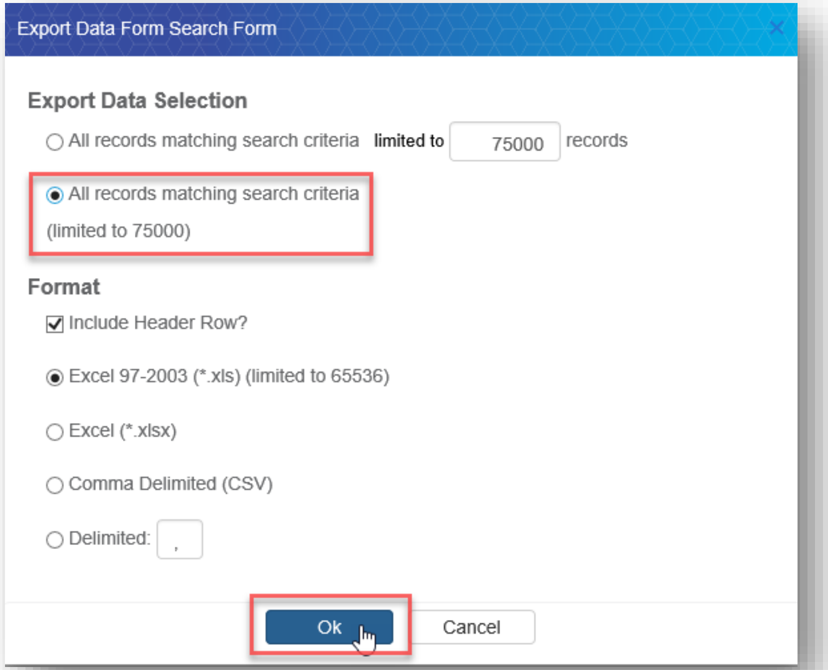
VIEWING PAYMENT HISTORY

Step 3: The information will populate.

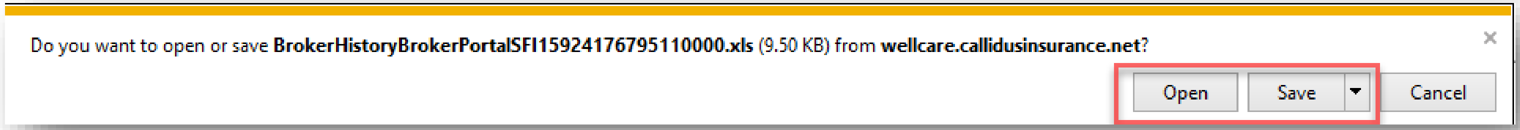


Step 4: Export the populated results by clicking the button on the upper right hand of your screen.

Select 'All records matching search criteria' bullet. Click **OK.**



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

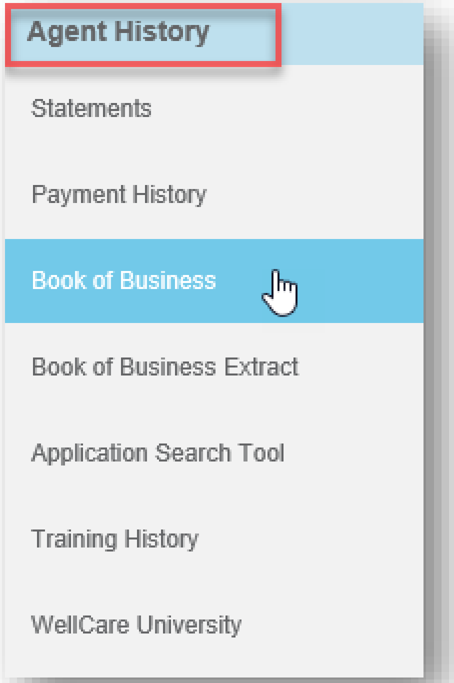


COMMISSIONS

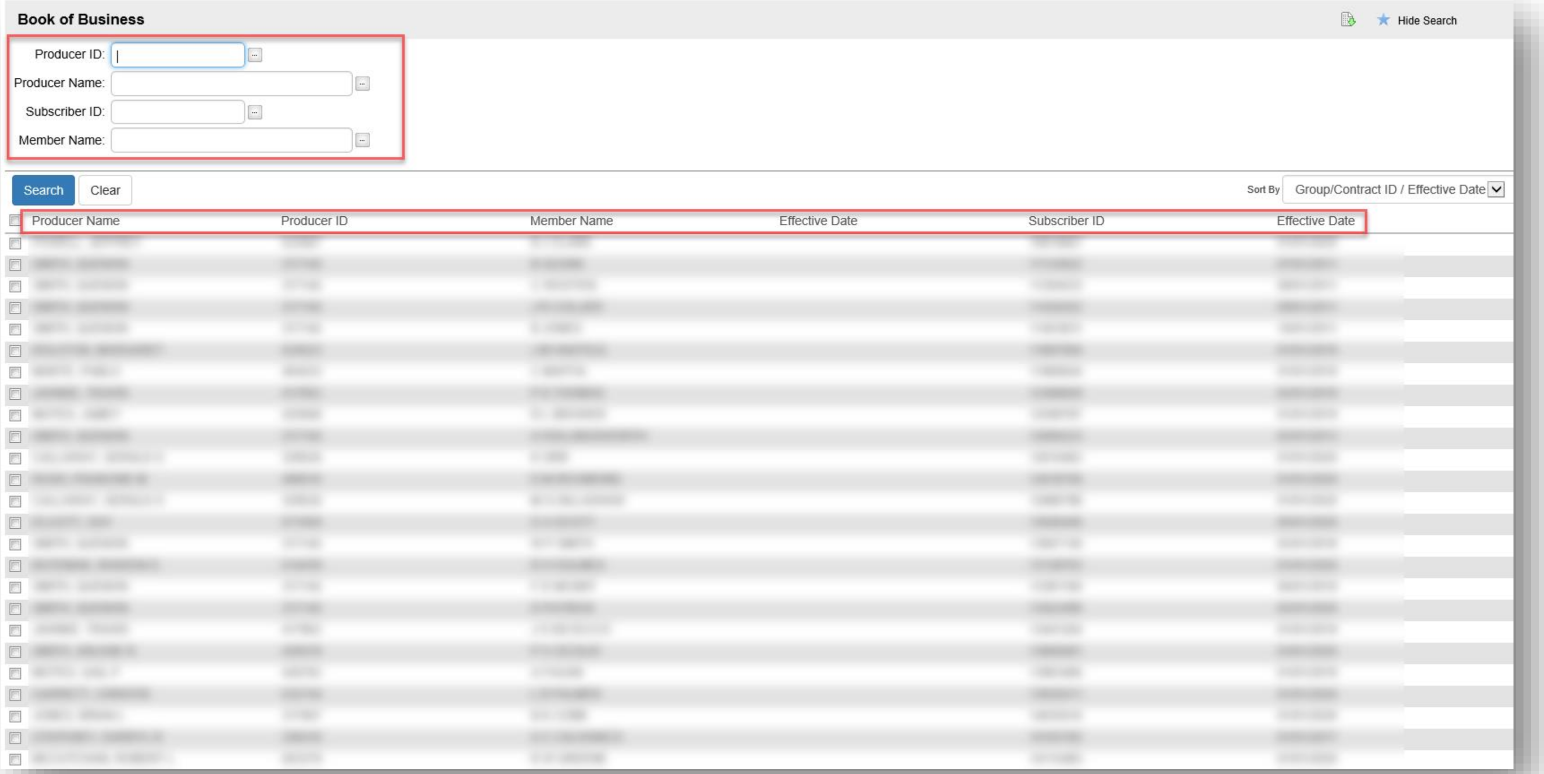
VIEWING YOUR BOOK OF BUSINESS

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

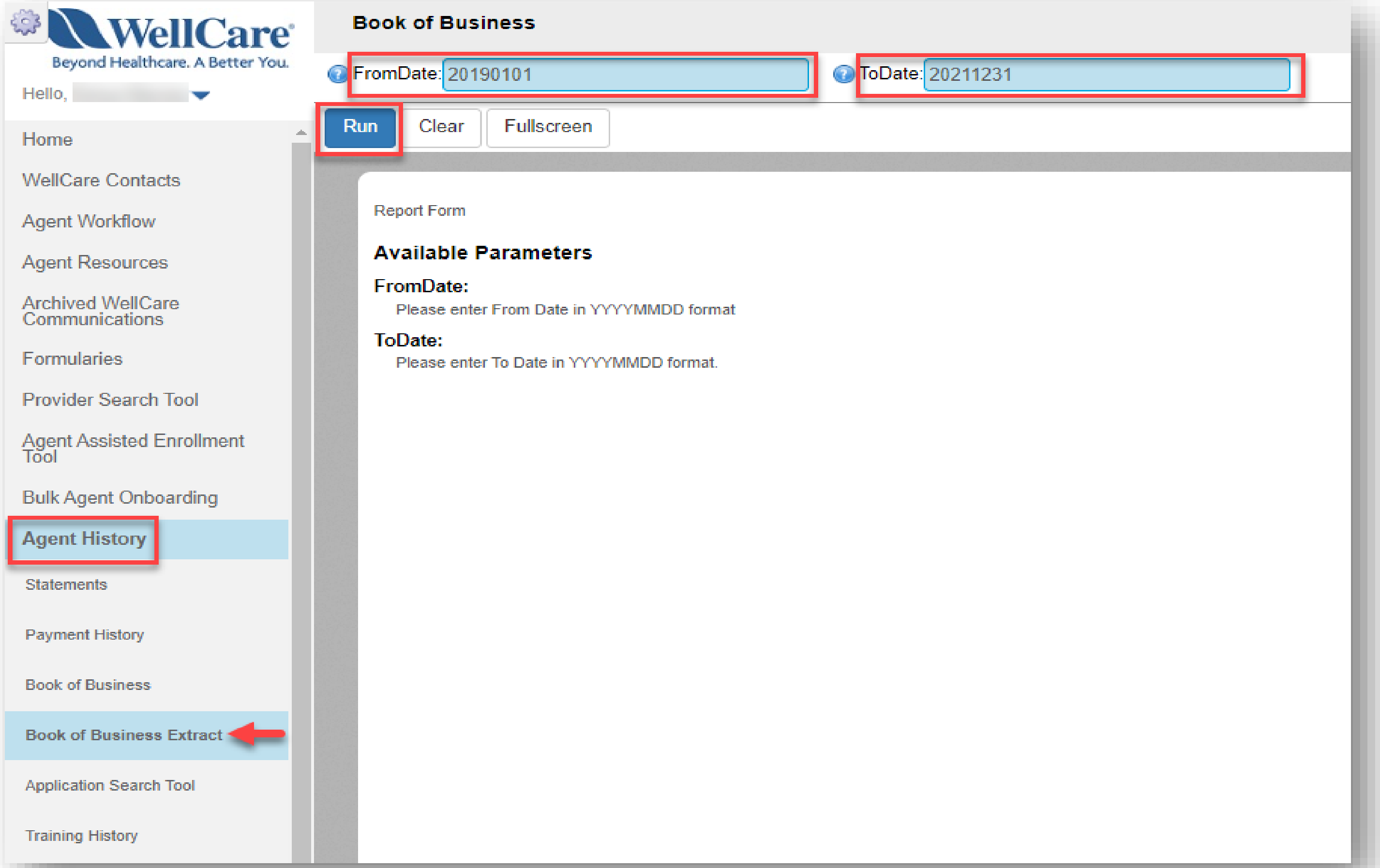
Within the Agent History tab in Agent Connect you have the ability to download your **Book of Business**. Take the following steps to export:

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.

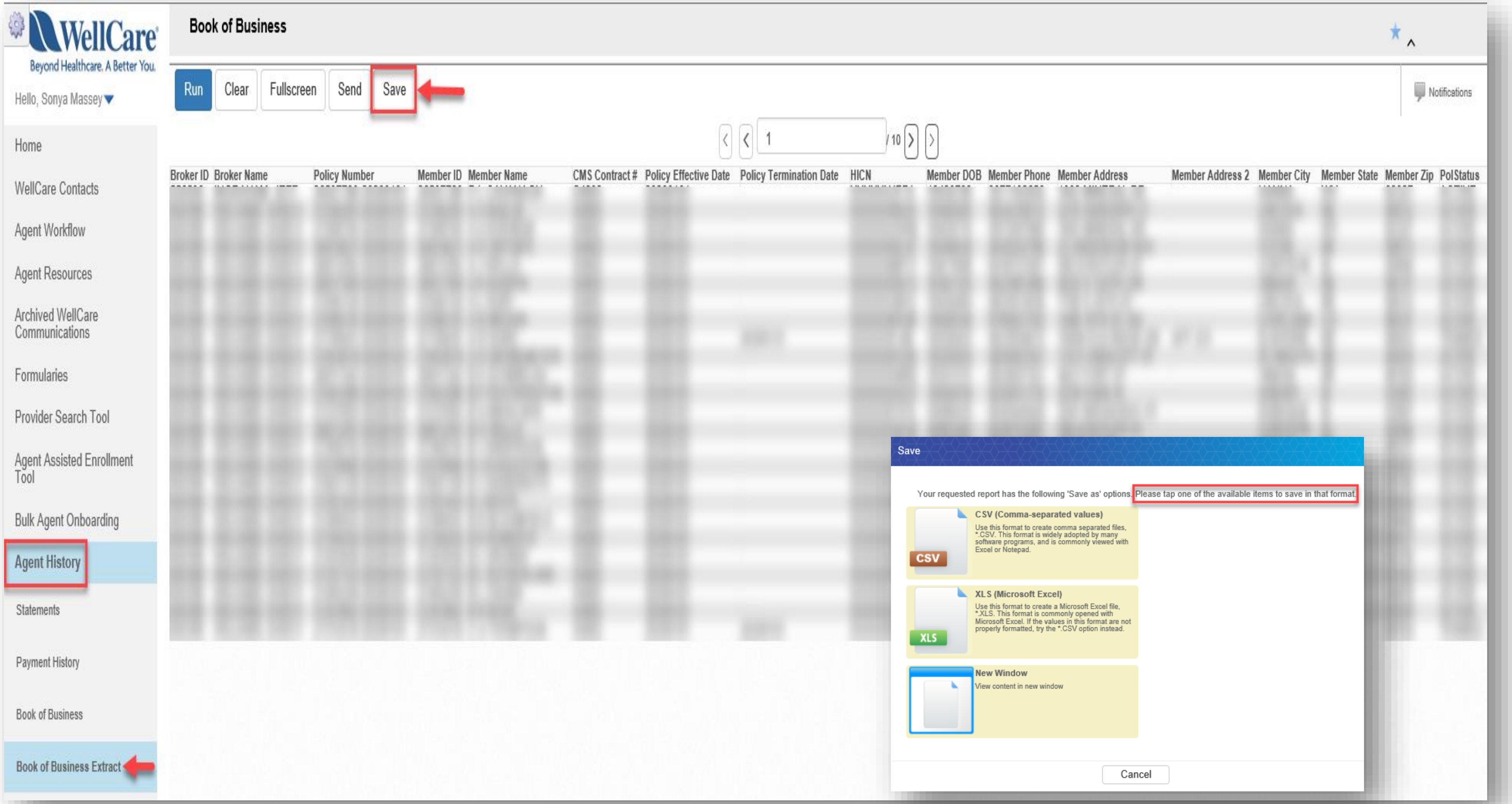
NOTE: A large Book of Business may take several minutes to populate. Please allow the system time to generate the results.



COMMISSIONS

DOWNLOADING BOOK OF BUSINESS (continued)

Step 3: Click **Save**. Select **XLS** (Microsoft Excel) option to export the data into an Excel spreadsheet document.



CENTENE Corporation

AGENT CONNECT USER GUIDE

AGENT PROFILE CHANGES

AGENT PROFILE CHANGES

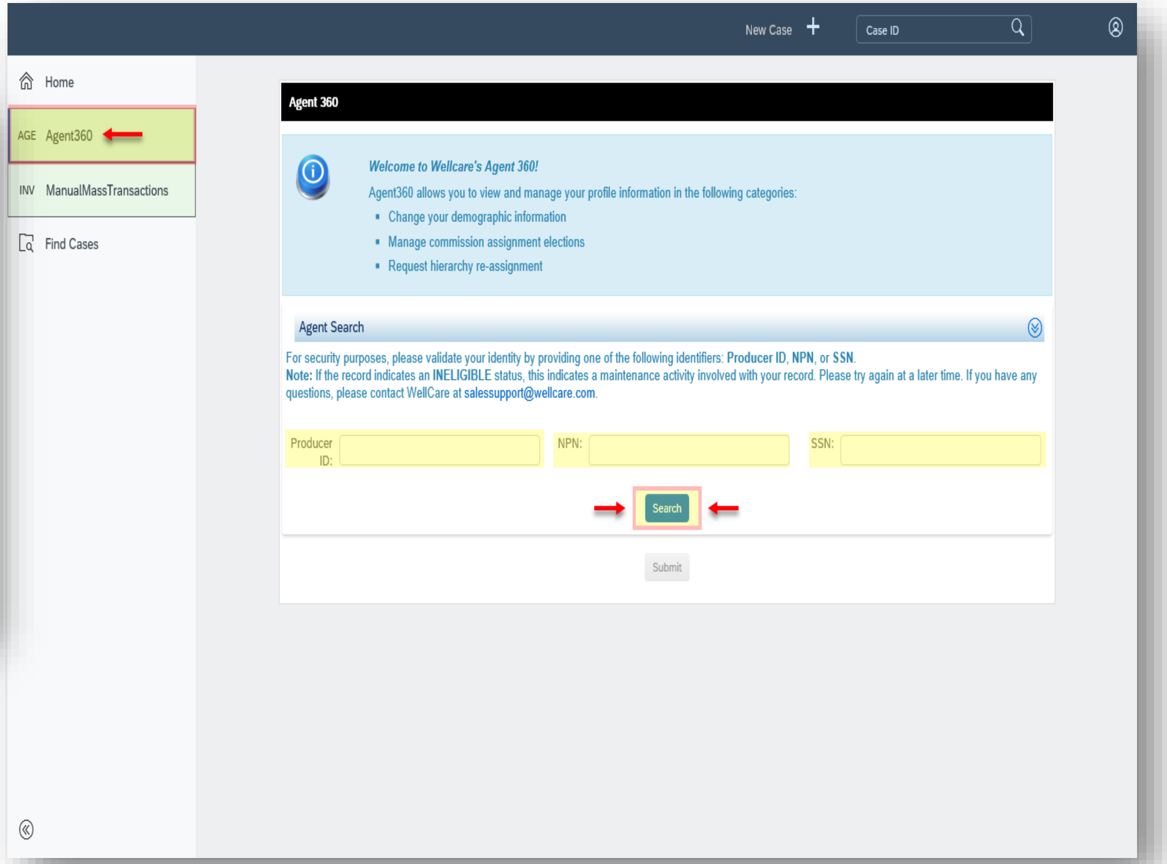
AGENT 360 VALIDATION

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: On the left menu, select Agent Workflow to **Login** through Agent Connect

Step 2: Click **Agent 360**

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

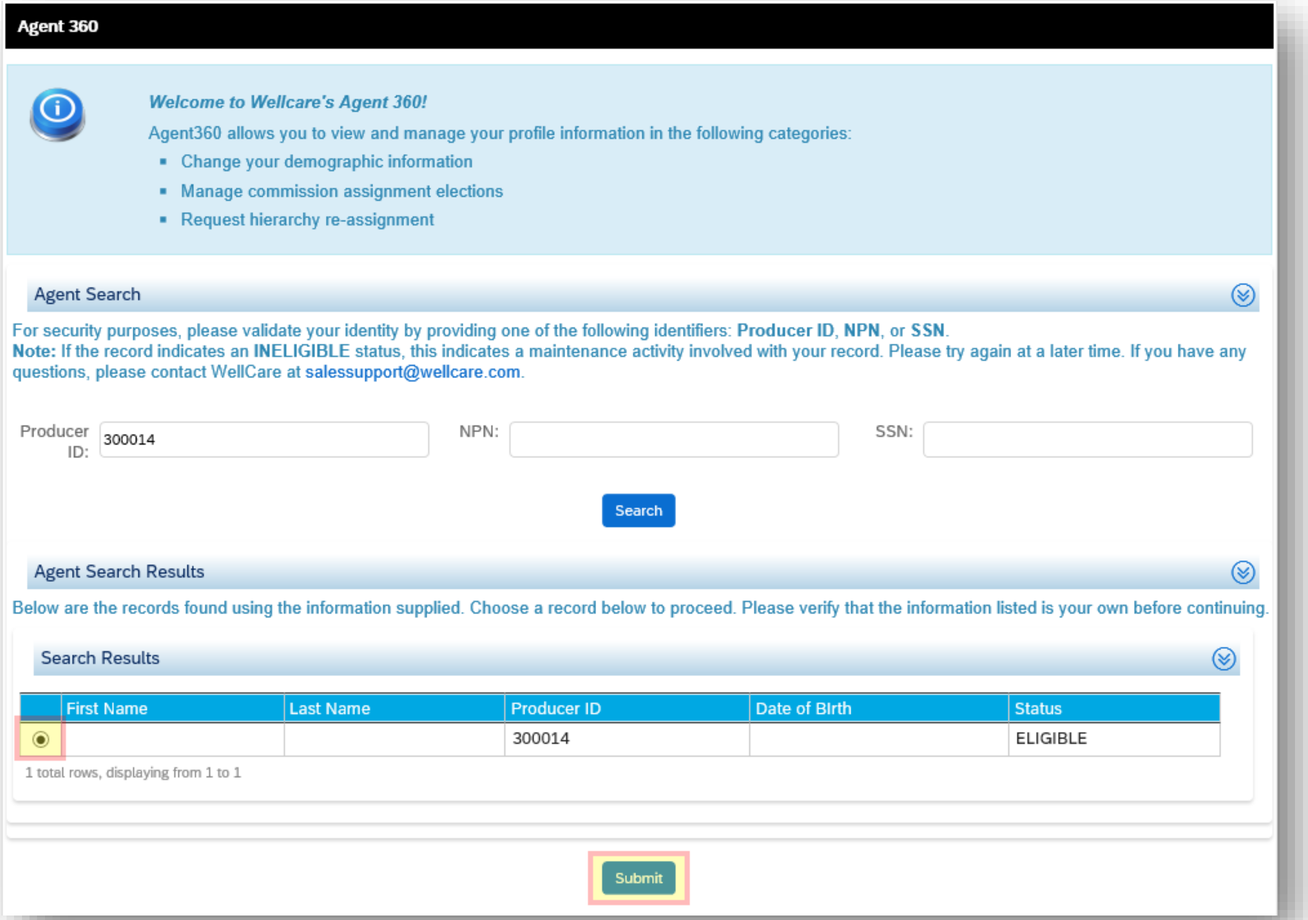


AGENT PROFILE CHANGES

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, you will receive an error.

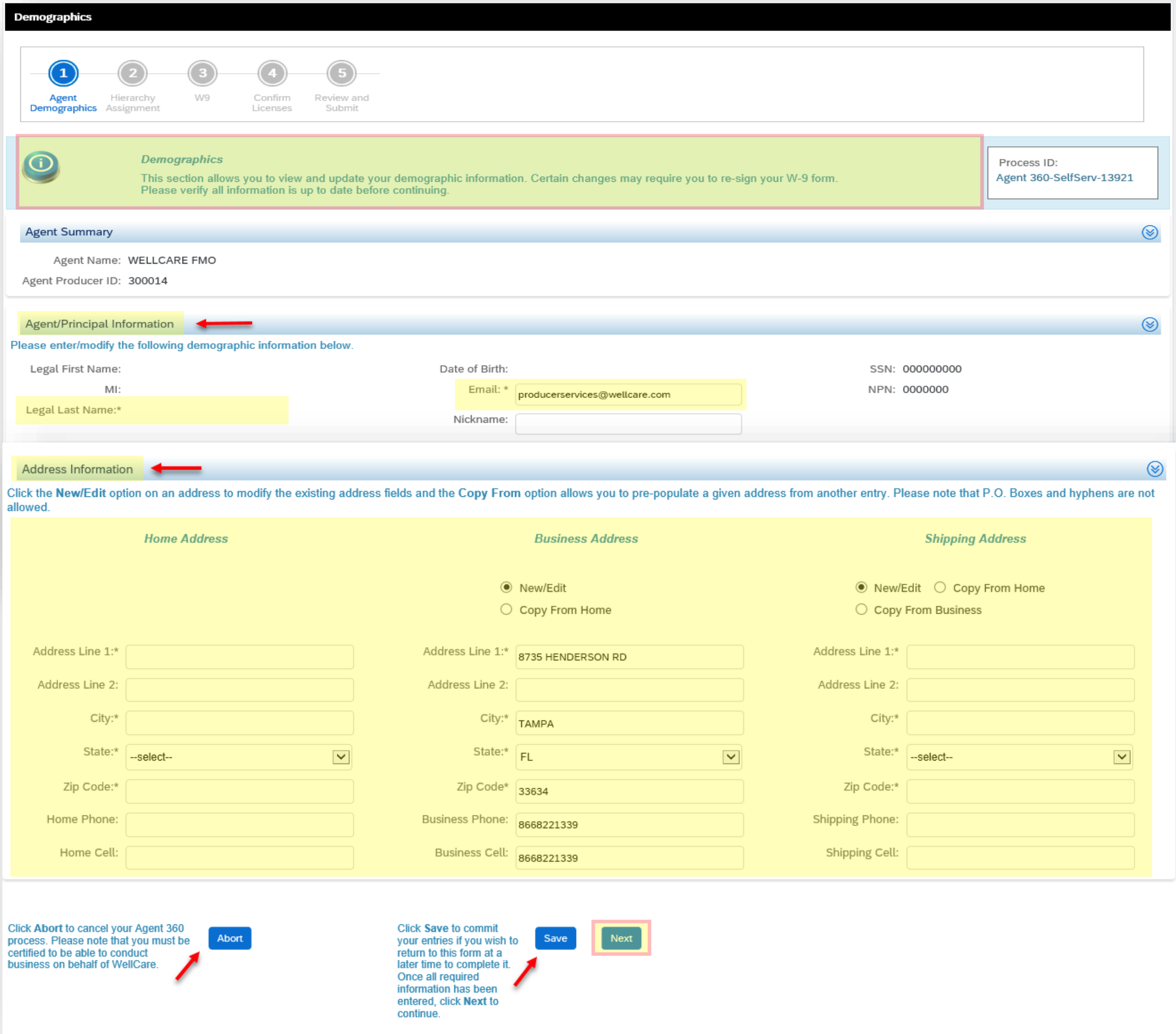


AGENT PROFILE CHANGES

DEMOGRAPHIC CHANGES TO YOUR PROFILE

Section 1 Allows you to make changes to your name, email address, phone number, and personal addresses.

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.



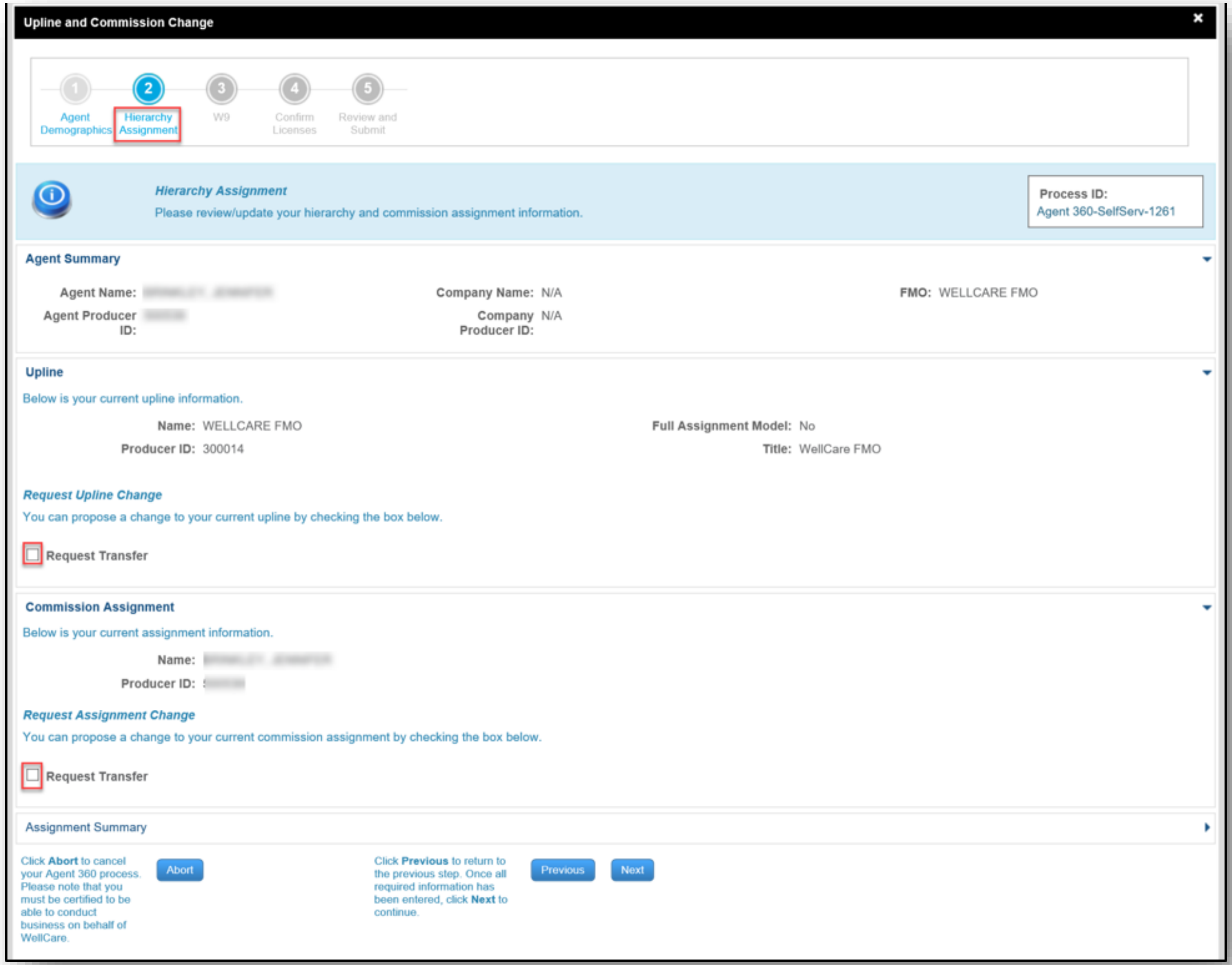
AGENT CONNECT USER GUIDE

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.



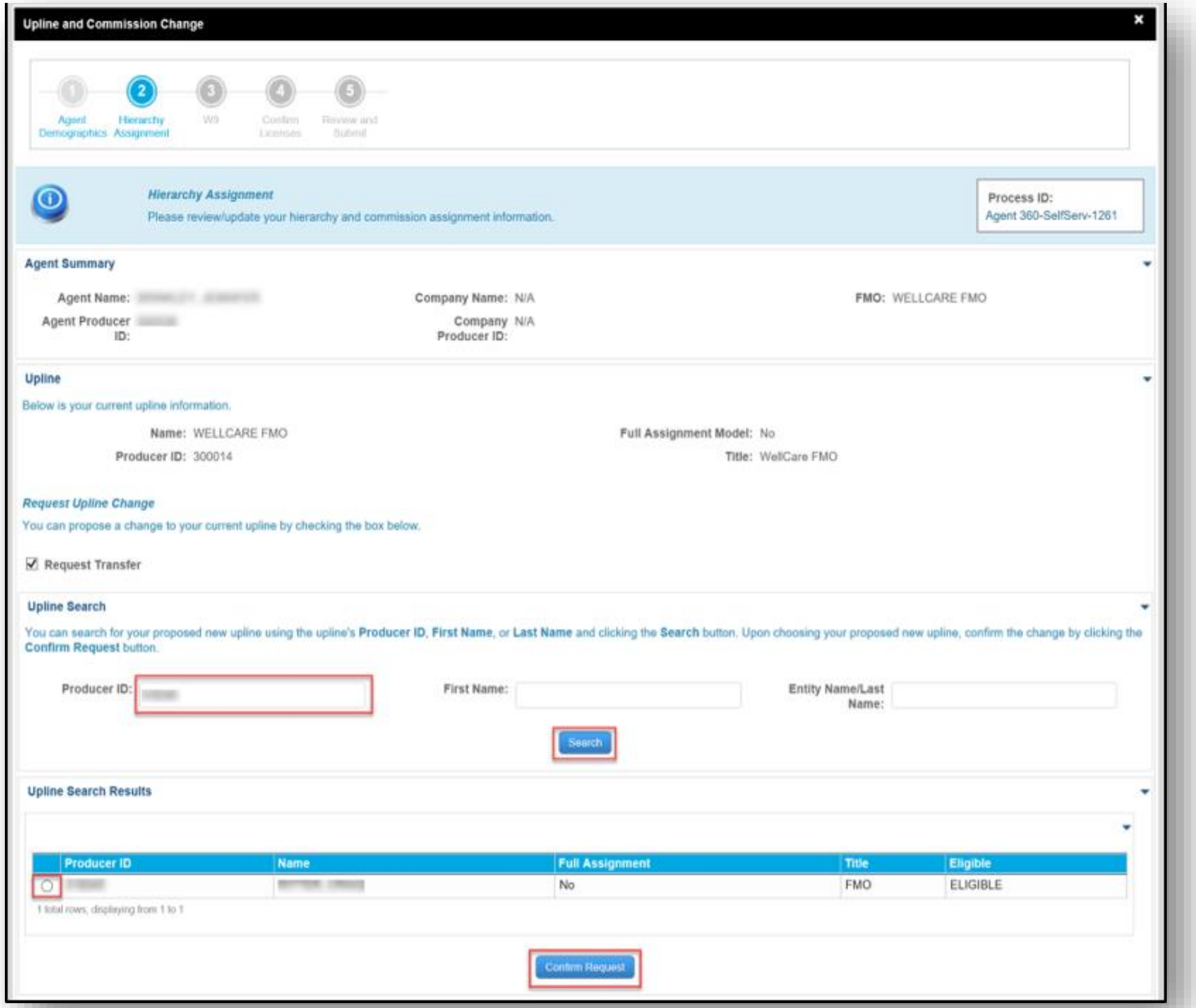
HIERARCHY & COMMISSION ASSIGNMENT CHANGES

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 [illegible],

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

New Hierarchy: [illegible]

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 / ASSIGNEMENT

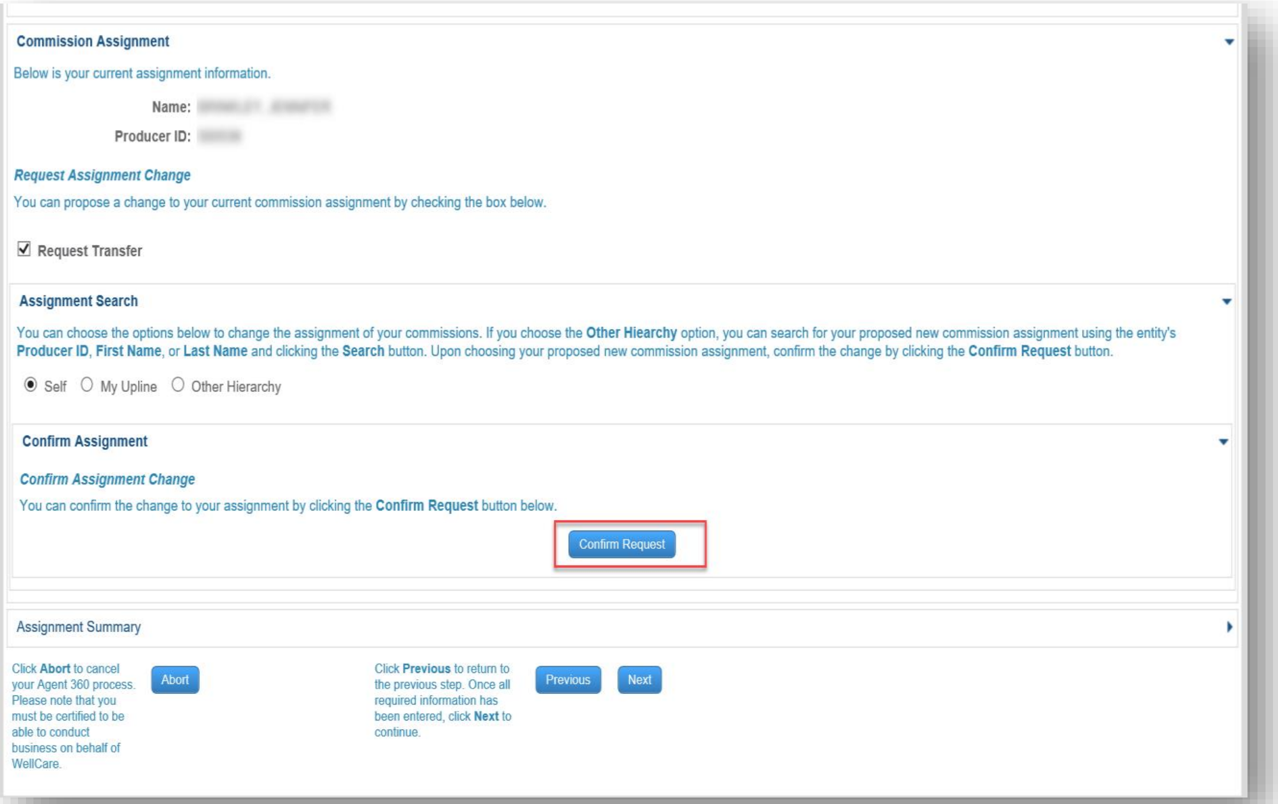
Commission Assignment is the contracted Agent who you elect to receive your commission check.

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

Step 2: **Select one of the following:**

- **Self** (You receive your own commissions)
- **Hierarchy** (Your direct Upline receives your commissions)
- **Other Hierarchy** (Another hierarchy within your hierarchy's downline receives your commissions)

Step 3: Click **Confirm Request**



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 [illegible],

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

New/Current Commissions Assignment : [illegible]

Prior Commissions Assignment : [illegible]

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

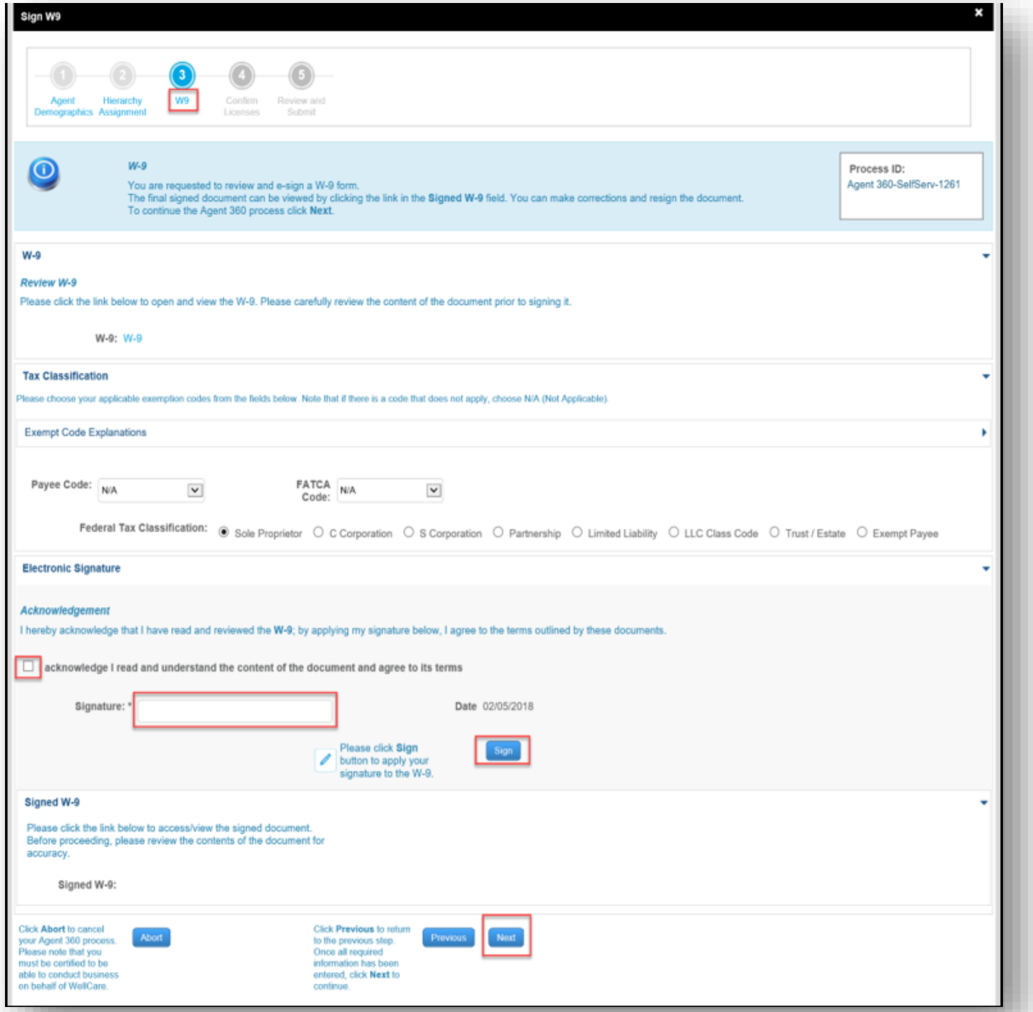
Section 3 - If you elected to update your Name and/or Shipping address in Section 1, Section 3 is where you will sign a new W9 to reflect your changes.

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



CENTENE Corporation

AGENT CONNECT USER GUIDE

LICENSING

LICENSING

CONFIRM LICENSES

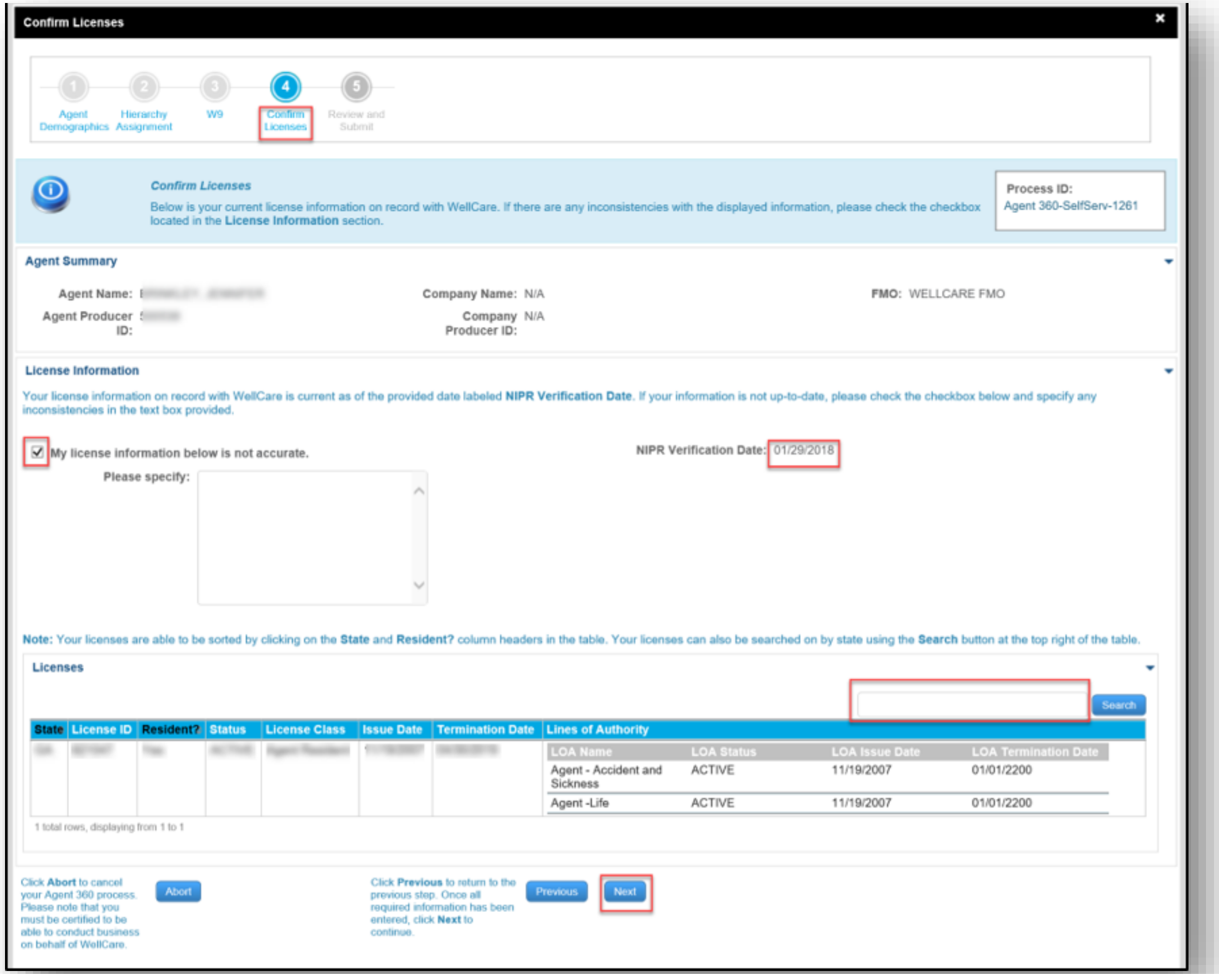
Section 4 - If your license information shown is incorrect or needs to be updated, complete the following steps:

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

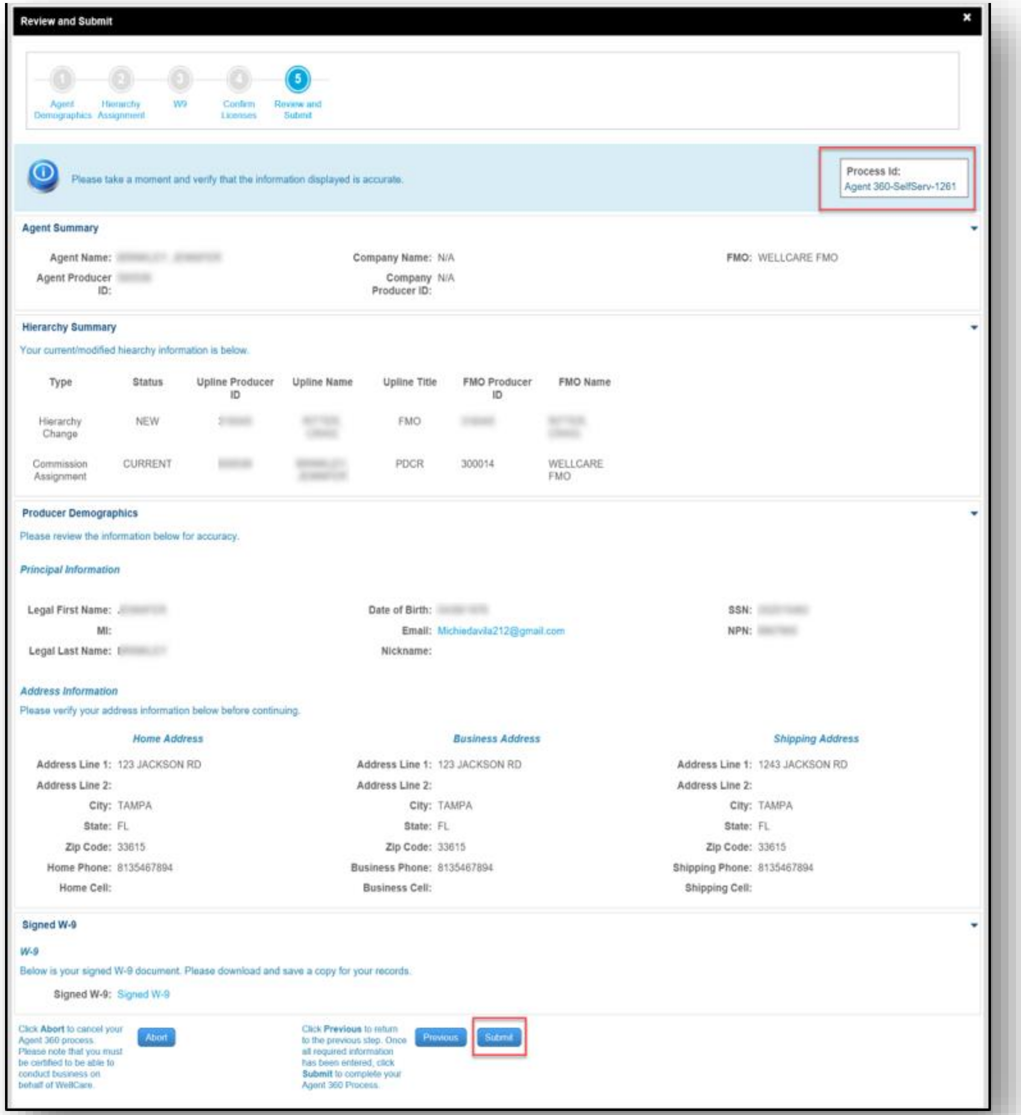
AGENT PROFILE CHANGES

REVIEW AND SUBMIT CHANGES

Section 5 - Review all changes made in Sections 1-4 to ensure new information is correct.

Once you have reviewed all is correct and you are ready to finalize:

Step 1: Click **Submit** and **Yes** to confirm



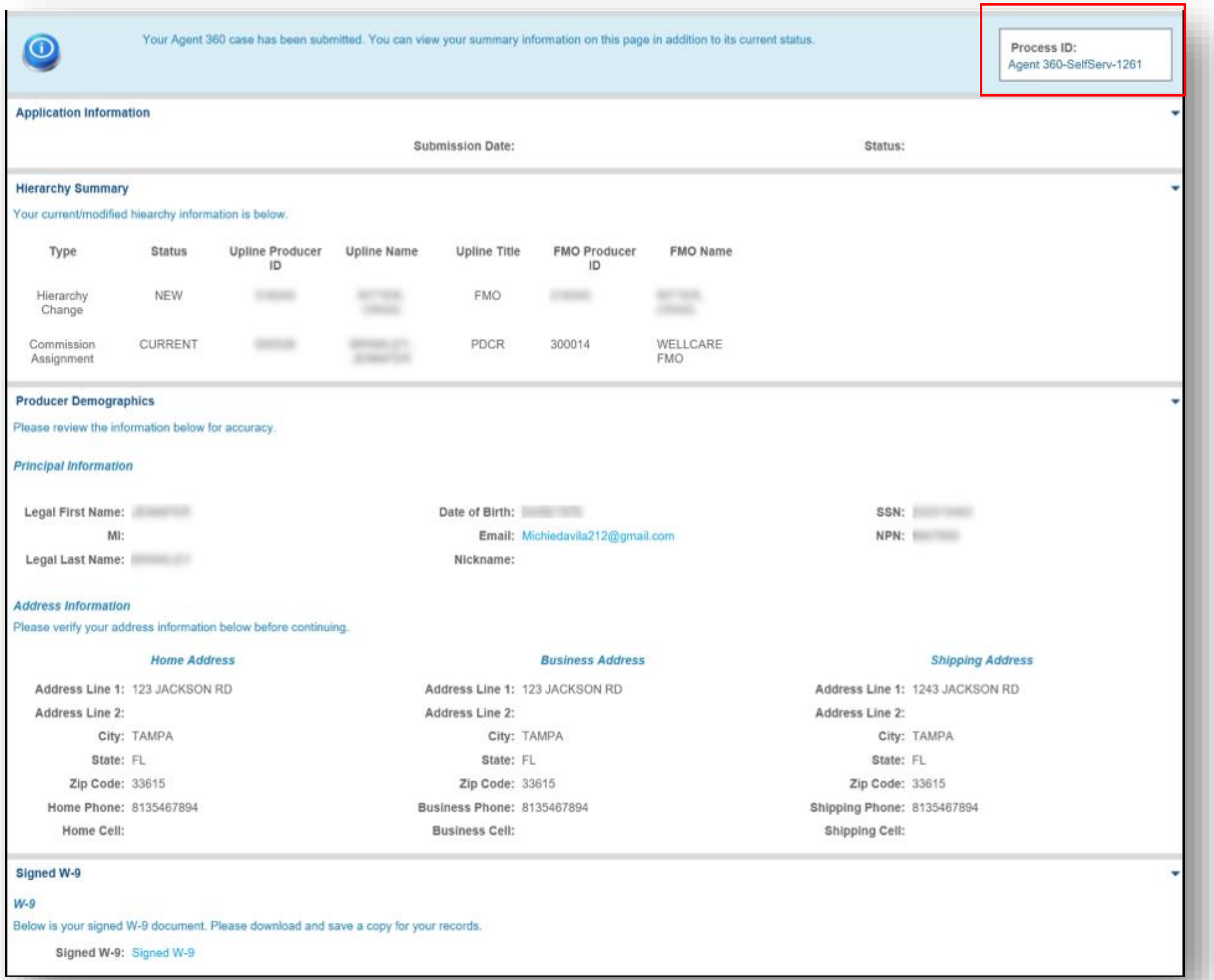
AGENT PROFILE CHANGES

CONFIRMATION PAGE

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

A **case number** will be provided at the <u>top right</u> of the screen.

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



Questions?

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

Monday through Friday

8am to 8pm ET

- Or -

Create an **Agent Support ticket** in Agent Connect