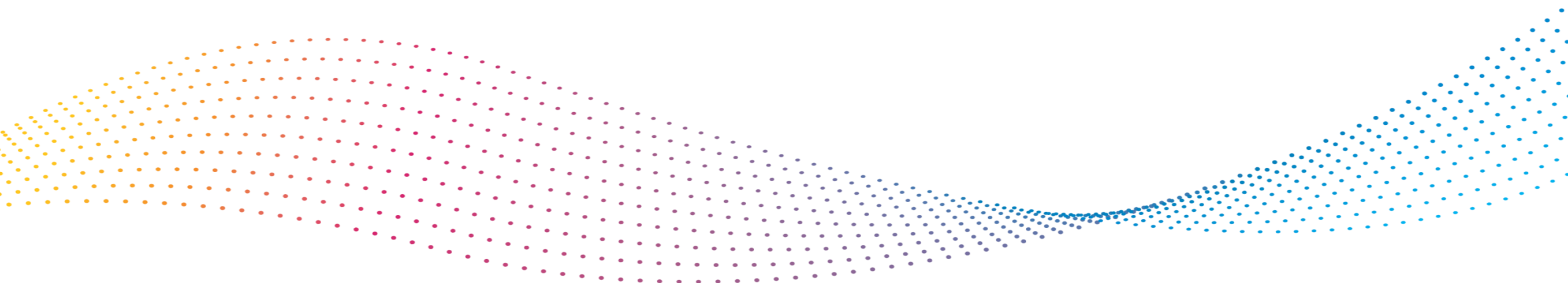


AGENT CONNECT USER GUIDE

June 2020





AGENT CONNECT USER GUIDE

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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.

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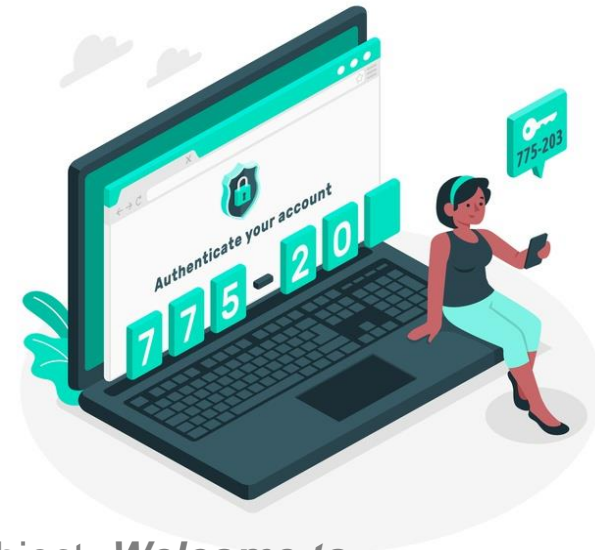
AGENT CONNECT USER GUIDE

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



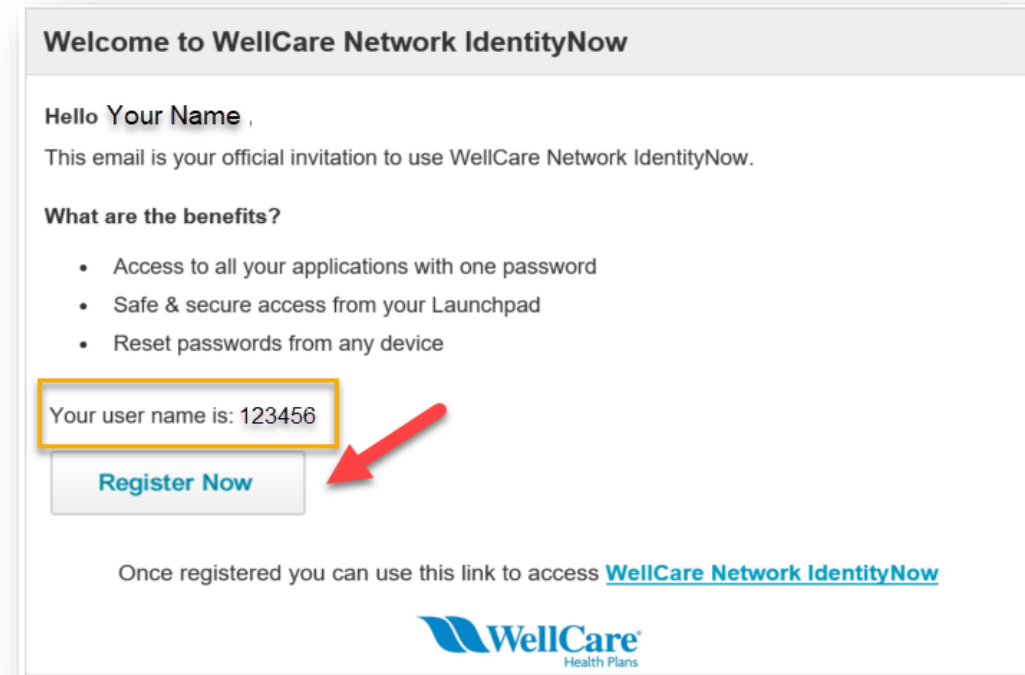
NOTE: Agencies do not have their own Single Sign-On Portal. If you are the Principal of an Agency, please refer to Page 22 for instructions on how to switch views to your agency's portal.

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

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

Alternate Email

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**



Single Sign-On Portal (SSO)

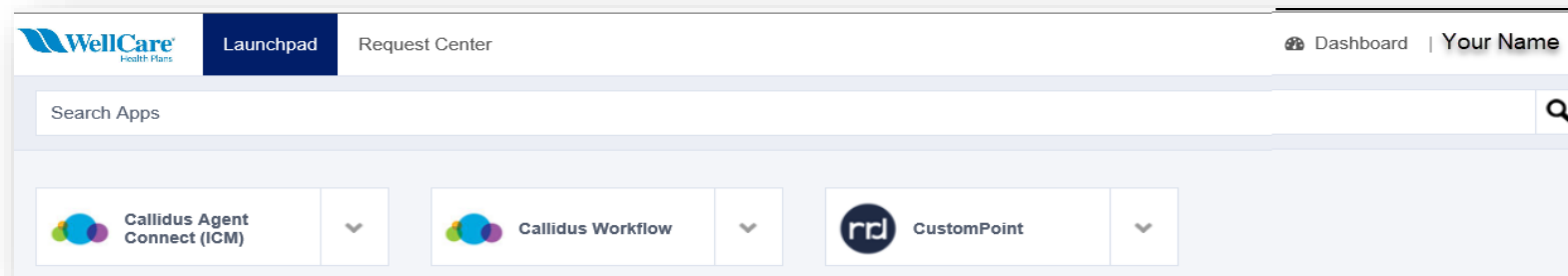
LOGGING INTO YOUR SINGLE SIGN-ON PORTAL

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

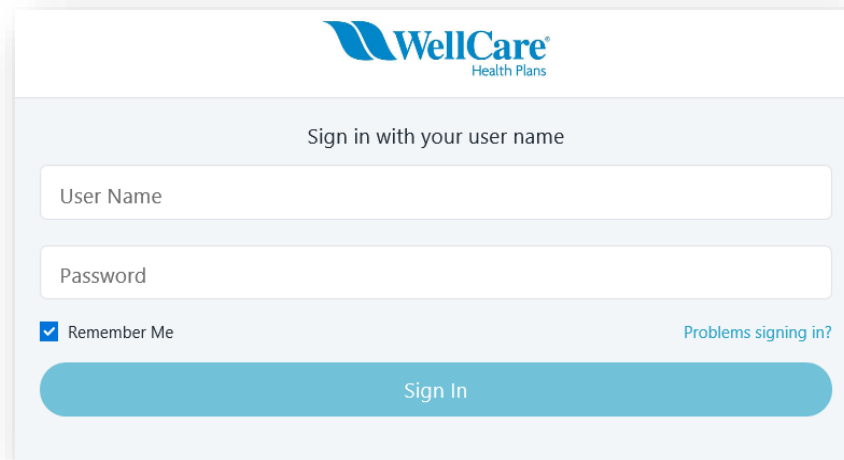
Single Sign-On Portal (SSO)

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?*



WellCare Health Plans


Sign in with your user name

User Name

Password

Remember Me [Problems signing in?](#)

Sign In



WellCare Health Plans

Sign in with your user name

124256

Password

Remember Me [Problems signing in?](#)

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 logo at the top. Below it, the text "What can we help you with?" is displayed. There are three blue buttons: "Forgot user name", "Reset password", and "Unlock account". A red arrow points to the "Reset password" button, which is highlighted with a yellow border.

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

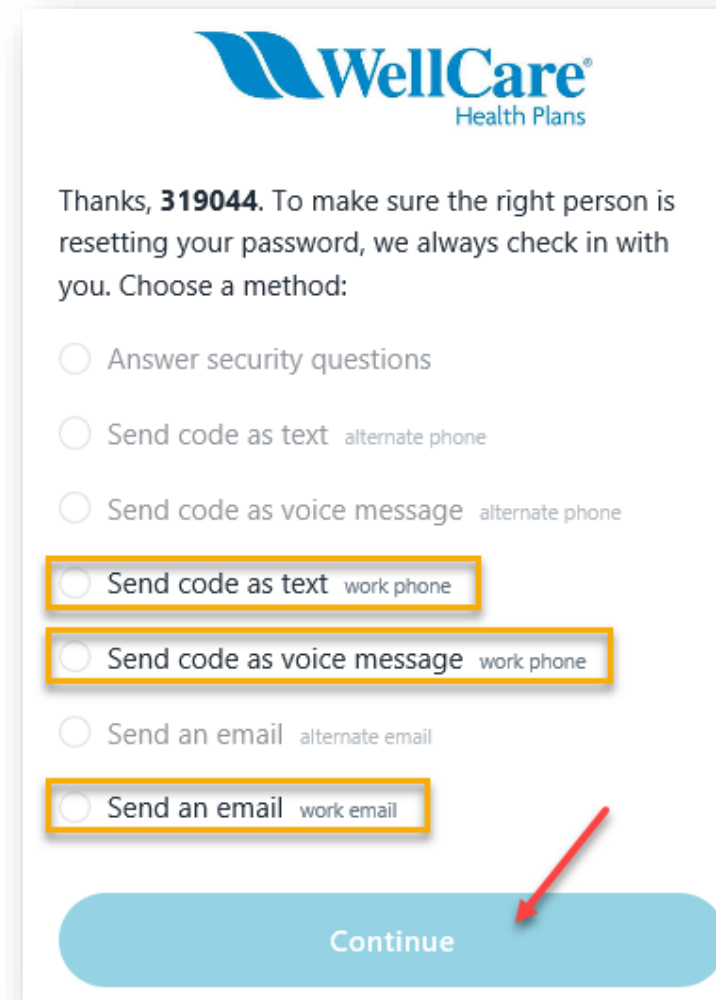


The screenshot shows the WellCare Health Plans logo at the top. Below it, the text "To reset your password, let's start with your user name." is displayed. There is a "User Name" label above a text input field containing the value "124256". A red arrow points to the input field. Below the input field 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**



The screenshot shows the WellCare Health Plans logo at the top. Below it, a message reads: "Thanks, 319044. To make sure the right person is resetting your password, we always check in with you. Choose a method:". There are six radio button options listed: "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", and "Send an email alternate email". The last three options are highlighted with orange boxes. At the bottom, there is a blue "Continue" button with a red arrow pointing to it.

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

A password input field with a blue border and a blue eye icon on the right side. A red arrow points to the field.

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 login interface for WellCare Health Plans. At the top is the WellCare logo. Below it is the heading "Sign in with your user name". There are two input fields: the first contains the username "124256" and the second contains a masked password represented by dots. Below the password field is a "Remember Me" checkbox which is checked, and a link "Problems signing in?". At the bottom is a large blue "Sign In" button. Three red arrows point to the username field, the password field, and the "Sign In" button respectively.



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**



WellCare[®]
Health Plans

Sign in with your user name

User Name

Password

Remember Me

[Problems signing in?](#)

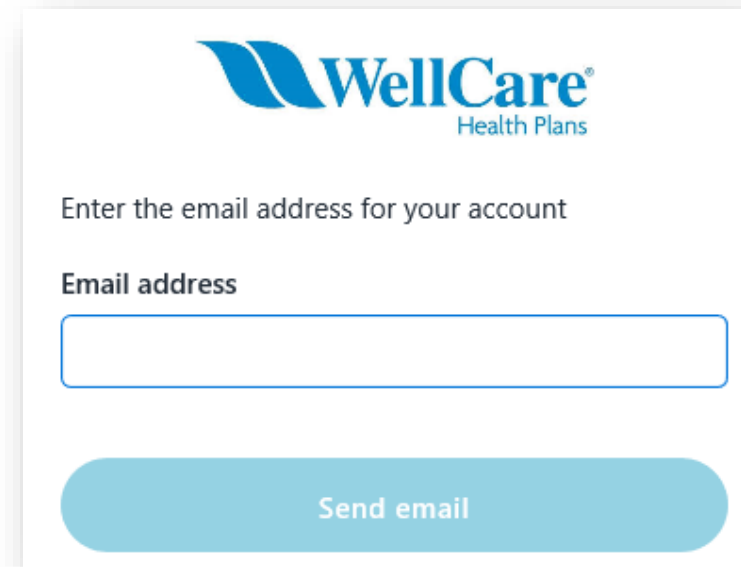
Sign In

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.



The screenshot shows a white rectangular form with a blue border. At the top left is the WellCare Health Plans logo, which consists of a blue stylized leaf icon followed by the text 'WellCare' in a bold blue font and 'Health Plans' in a smaller blue font below it. Below the logo, the text 'Enter the email address for your account' is displayed. Underneath this is the label 'Email address' followed by a white rectangular input field with a blue border. At the bottom of the form is a large, rounded blue button with the text 'Send email' in white.

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

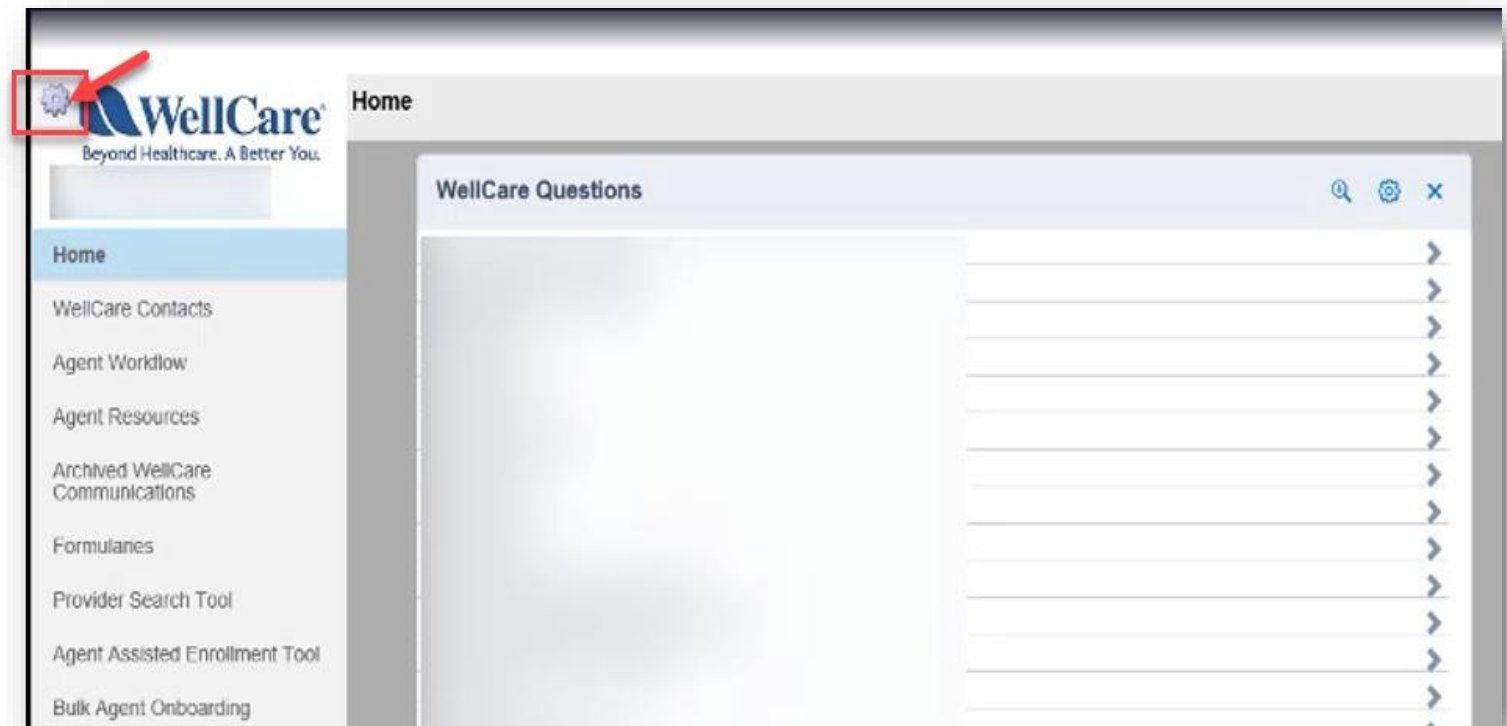
Principal Agents who own Agencies have the ability to switch views between the two broker portals without logging out and relogging in.

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 Agents have this ability. Downline Agents do not.



Single Sign-On Portal (SSO)

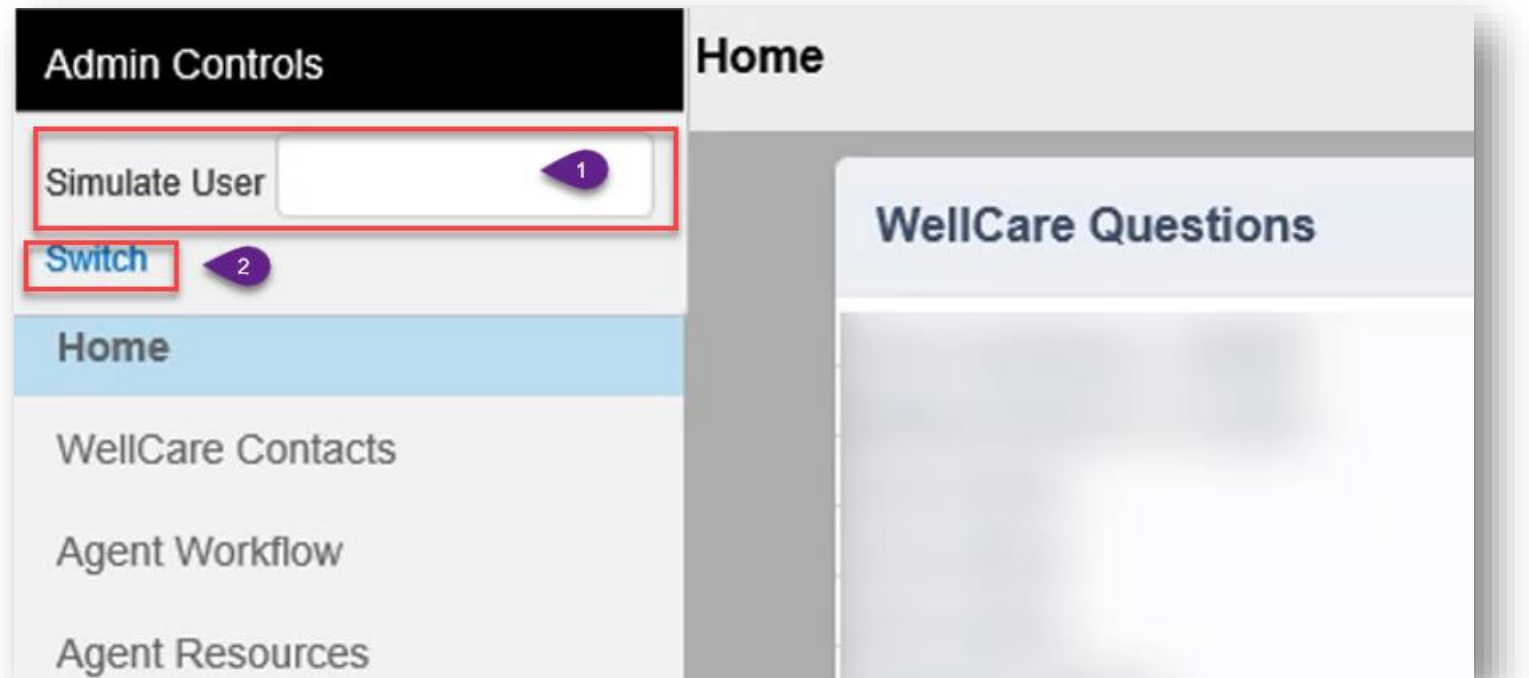
AGENT CONNECT LOGIN & SWITCH CAPABILITY TO VIEW AS AGENCY PRINCIPAL

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)

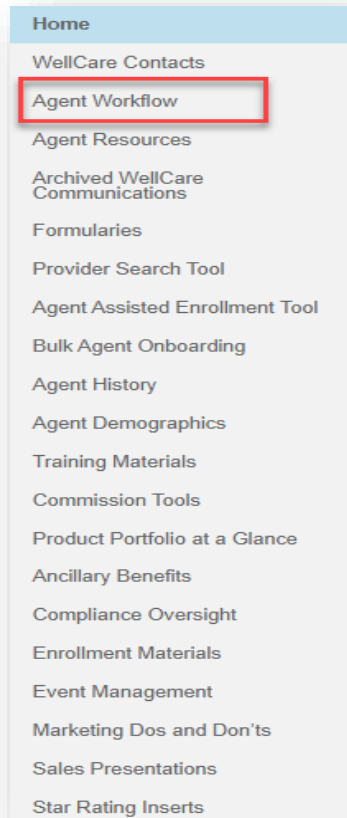
FUTURE RELEASE: Access to Agent Workflow will be available in the Phase 3 Single Sign-On release!

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.

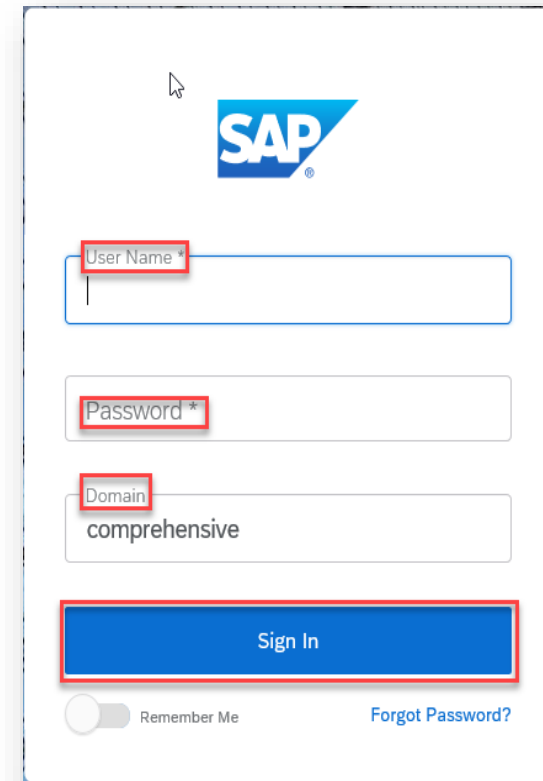
Step 1: Select **Agent Workflow** from the left menu within your Agent Connect profile.



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**

A login form for SAP. At the top is the SAP logo. Below it are three input fields: 'User Name *', 'Password *', and 'Domain comprehensive'. The 'User Name' and 'Password' fields are highlighted with red boxes. Below the input fields is a blue 'Sign In' button, also highlighted with a red box. At the bottom left is a 'Remember Me' checkbox, and at the bottom right is a 'Forgot Password?' link.

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 the instructions and an information icon. The instructions are:

- 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 the instructions are two input fields:

New Password *

Confirm Password *

At the bottom, there are two buttons: "Change Password" (highlighted with a red and yellow border) and "Log Off".



AGENT CONNECT USER GUIDE

AGENT MATERIALS

ENROLLMENT MATERIALS

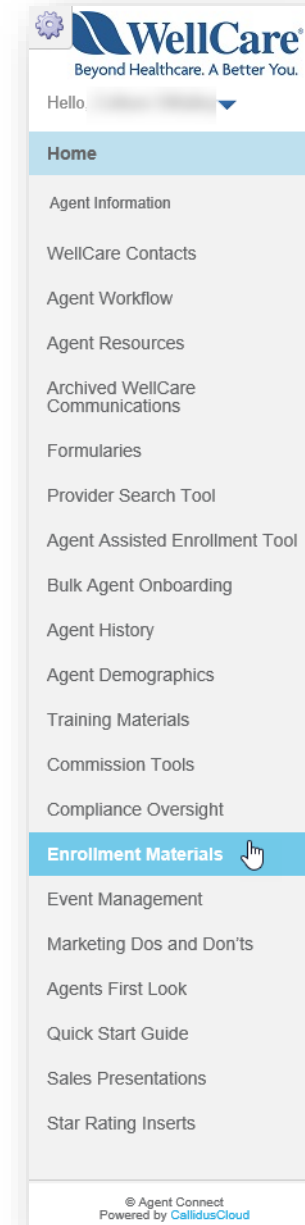
LOCATING ENROLLMENT FORMS AND OTHER MATERIALS IN AGENT CONNECT

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

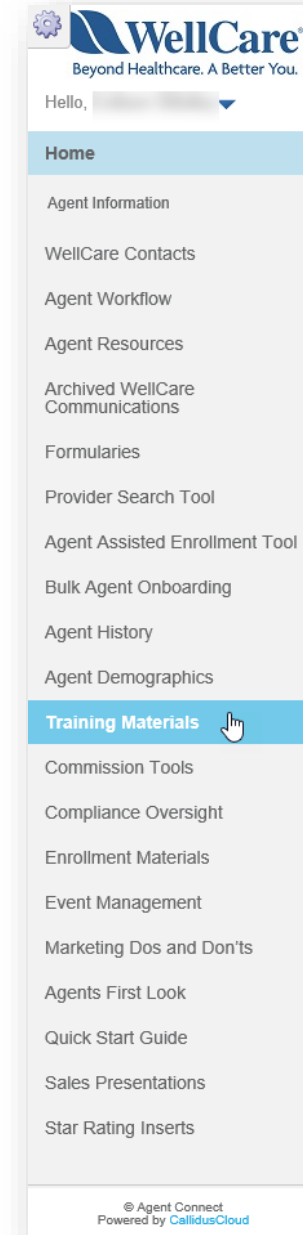
LOCATING TRAINING DOCUMENTS AND OTHER USEFUL GUIDES IN AGENT CONNECT

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!





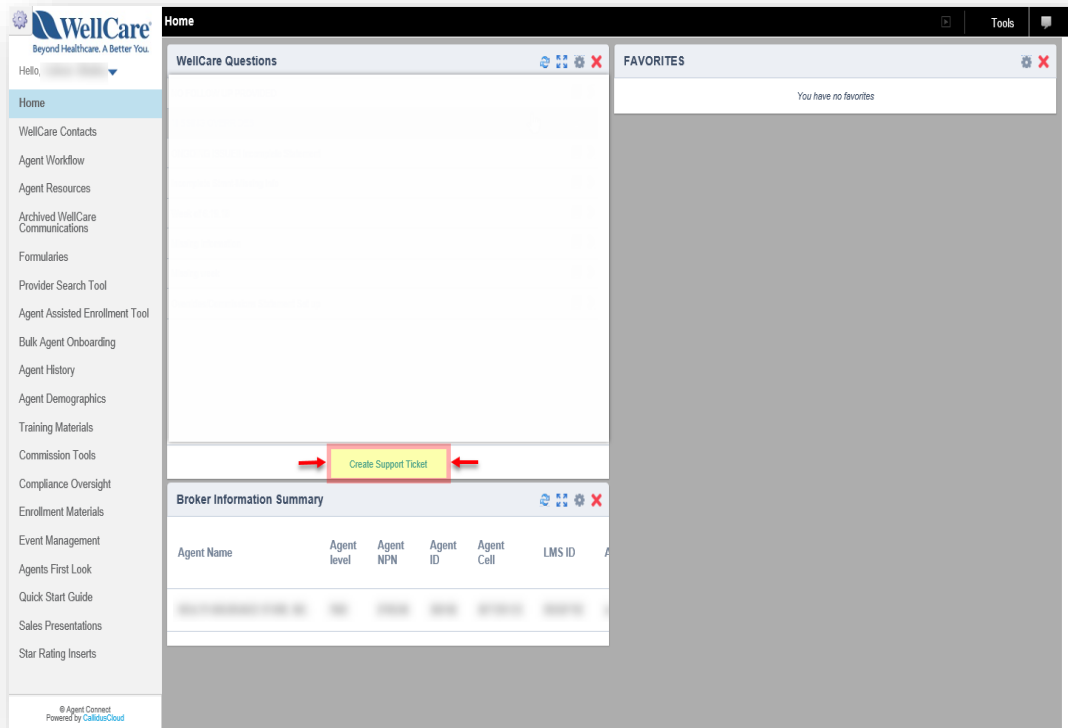
AGENT CONNECT USER GUIDE

CREATING SUPPORT TICKETS

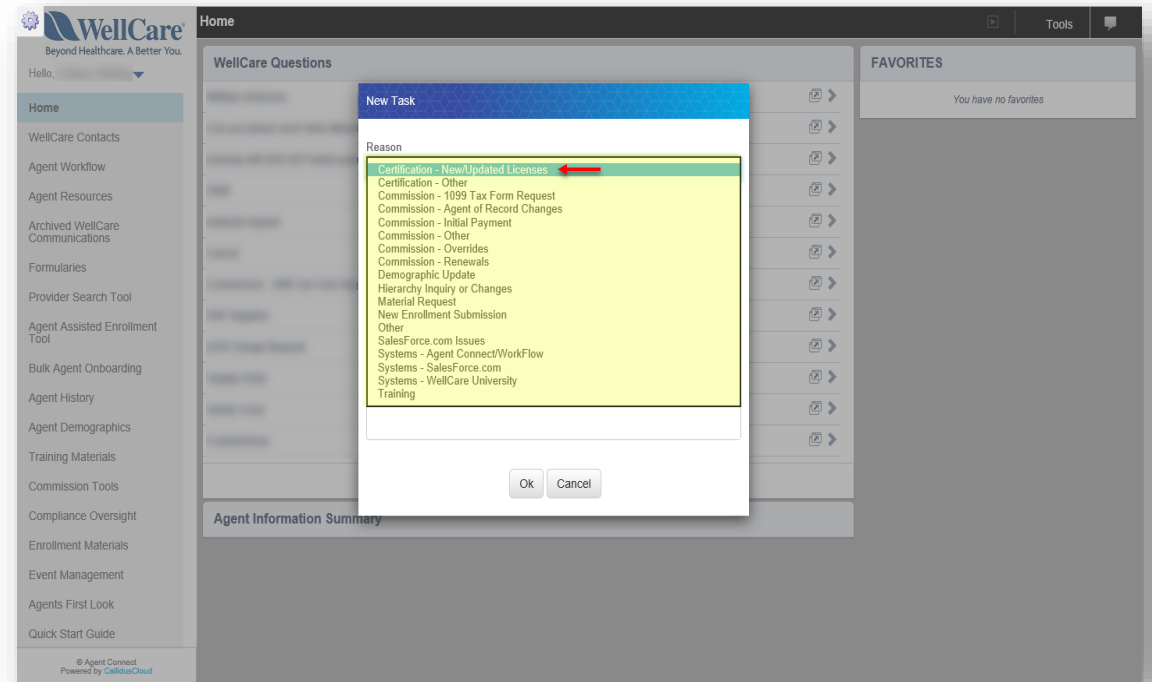
CREATING SUPPORT TICKETS

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**.



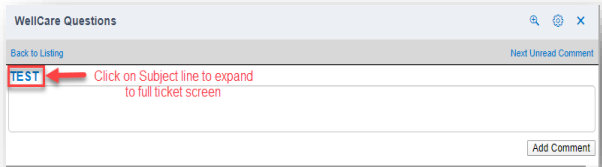
CREATING SUPPORT TICKETS

CREATING SUPPORT TICKET IN AGENT CONNECT PORTAL

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

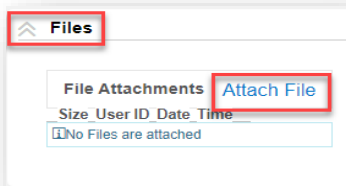
Step 1: Click the **boxed arrow** symbol to the right of the subject line, after you have submitted the ticket →

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



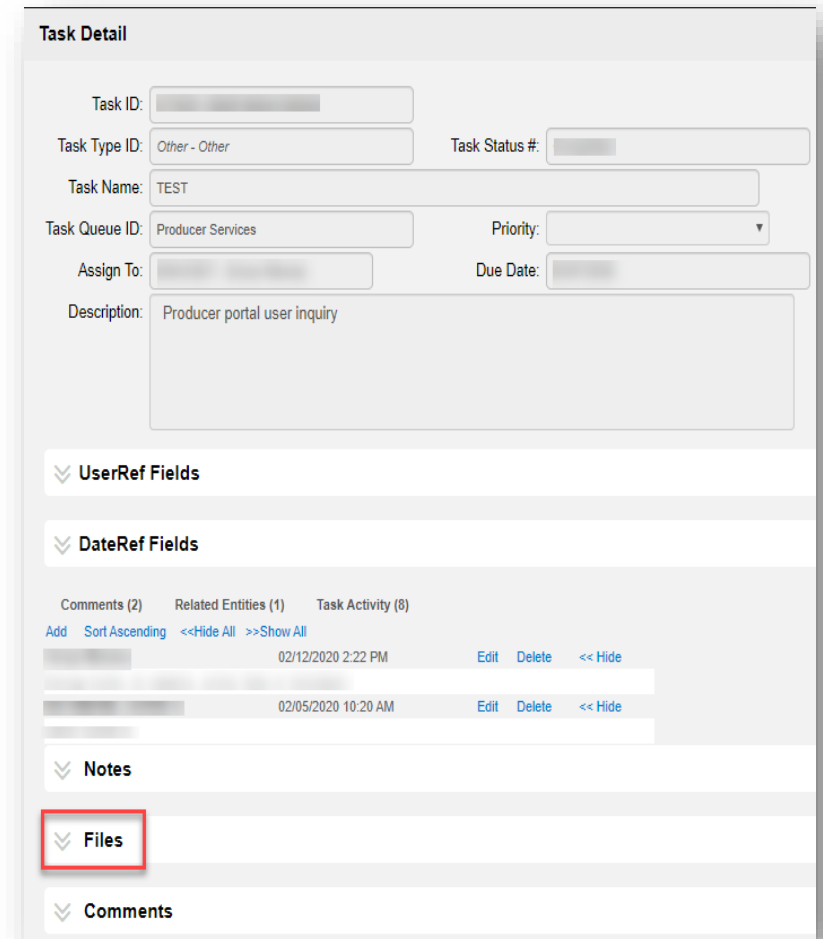
Step 3: A new window with your previously submitted ticket will open. Scroll to the bottom of the window, and click the arrows to the left of the word **Files**

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**

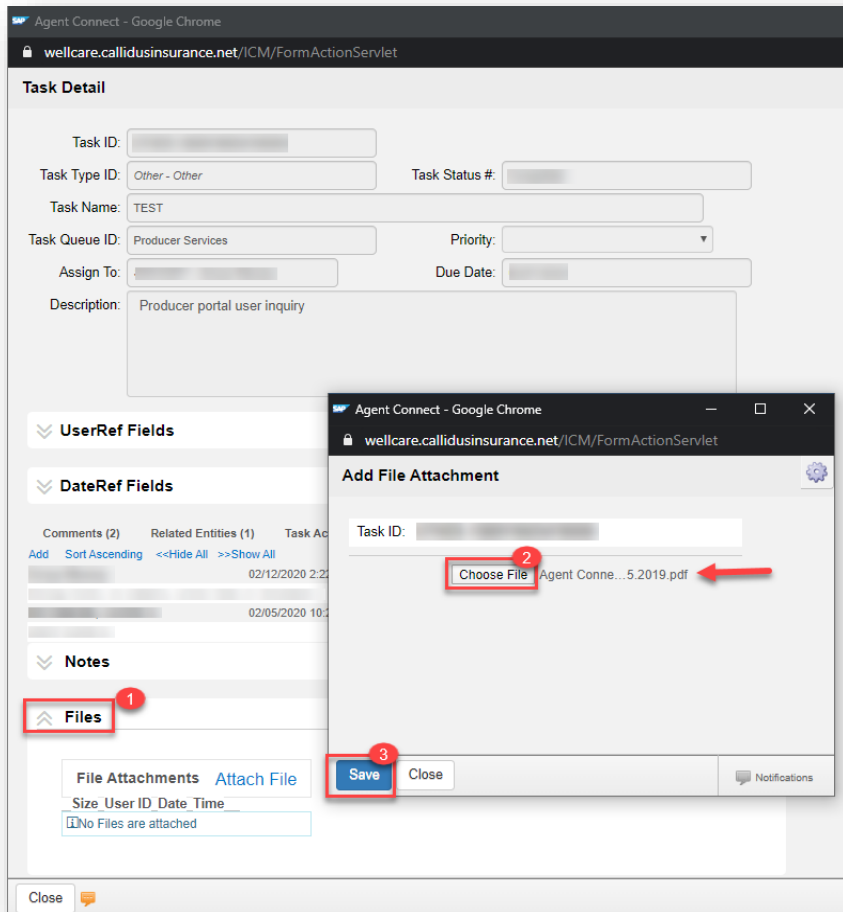


CREATING SUPPORT TICKETS

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.

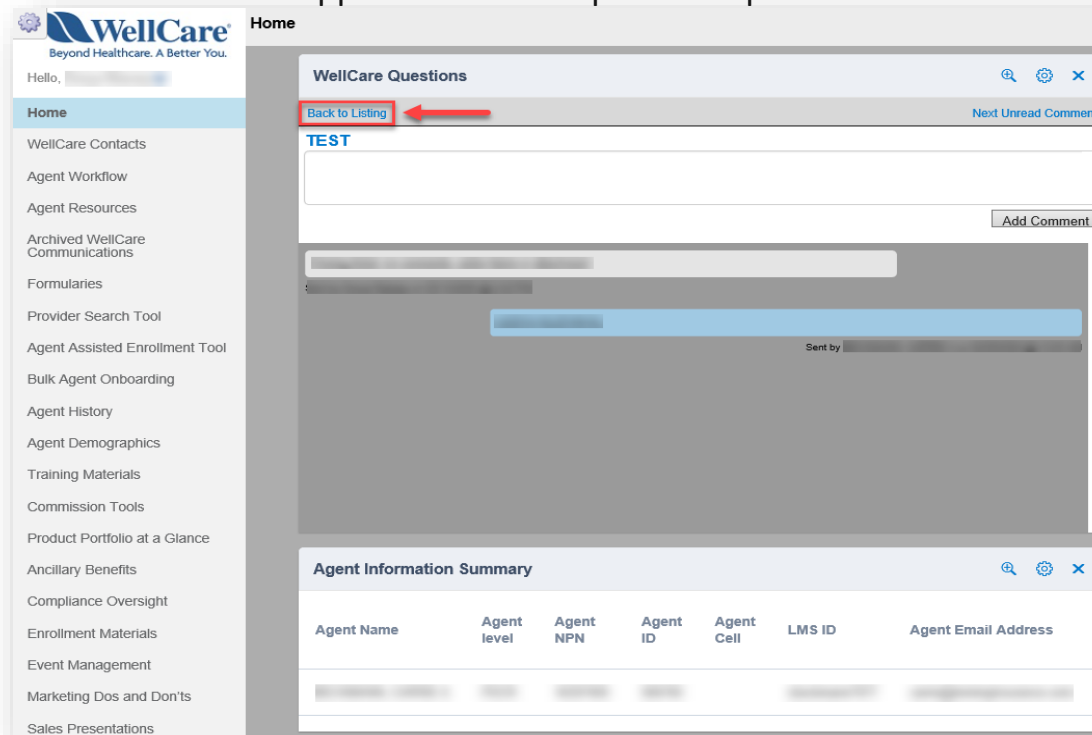


CREATING SUPPORT TICKETS

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 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.



The screenshot displays the WellCare interface. On the left is a navigation menu with the WellCare logo and tagline 'Beyond Healthcare. A Better You.' The main content area is titled 'WellCare Questions' and includes a 'Back to Listing' link highlighted with a red box and arrow, a 'Next Unread Comment' link, a text input field containing 'TEST', and an 'Add Comment' button. Below this is an 'Agent Information Summary' section with a table of agent details.

Agent Name	Agent level	Agent NPN	Agent ID	Agent Cell	LMS ID	Agent Email Address



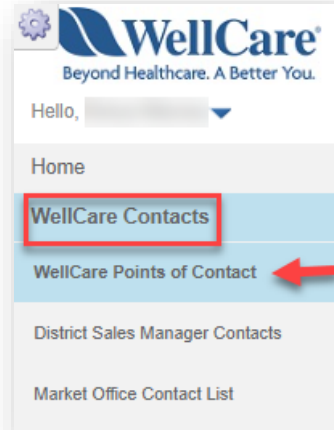
AGENT CONNECT USER GUIDE

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.



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

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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



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



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**

The screenshot shows the WellCare Application Search Tool interface. The left sidebar menu has 'Agent History' and 'Application Search Tool' highlighted. The main area contains search filters for SignatureDate, Application Status, Producer ID, Member Name, Plan ID, Effective Date, and ApplicationID. A 'Search' button is visible below the filters. Below the filters is a table with columns: Producer Name, Producer ID, ApplicationID, Member Name, Plan ID, Application Status, RFI Description, SignatureDate, and Effective Date.

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.

The screenshot shows the WellCare Application Search Tool interface. The 'Application Status' dropdown menu is open, showing 'RFI' selected. The 'Search' button is highlighted. A table of application results is visible on the right.

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 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**.

The screenshot displays the 'Customer Application Detail' page for WellCare. The left sidebar contains a navigation menu with items like 'Home', 'WellCare Contacts', 'Agent Workflow', 'Agent Resources', 'Archived WellCare Communications', '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', 'Customer Application Detail', and 'Training History'. The main content area is titled 'Customer Application Detail' and is divided into sections: 'Name and Contact Information' (with fields for First Name, Last Name, AdrLine1, AdrLine2, City, State, Zip, Home Phone, and Email), 'Personal Information' (with fields for Medicare ID and Applicant ID), 'RFI Description' (with a dropdown menu showing 'RFI - HICN Not Found'), 'Files', and 'Comments'. The 'RFI Description' dropdown is highlighted with a red border.



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 sidebar, the 'Agent History' menu is expanded, and the 'Statements' sub-tab is selected. The main content area shows a 'Statements' page with search filters for 'Member Effective Year' and 'Member Effective Month', and a 'Statement Date' field. Below these filters is a table with the following data:

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

An Internet Explorer pop-up window is visible in the bottom right corner, displaying the message: 'What do you want to do with 15578704249570000.pdf? From: wellcare.callidusinsurance.net'. The window offers three options: 'Open', 'Save', and 'Save as', along with a 'Cancel' button.

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.

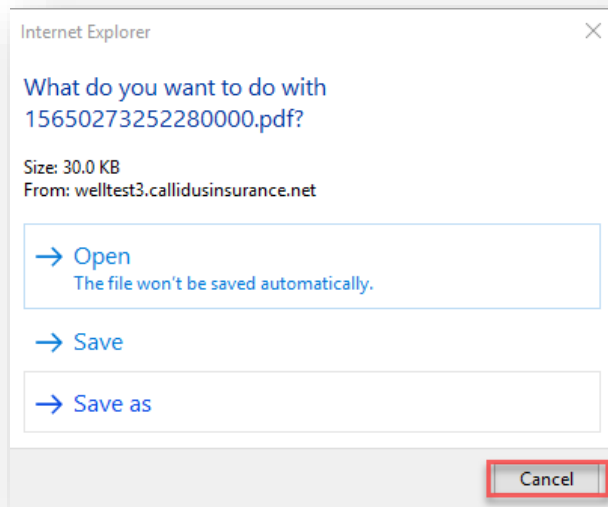
The screenshot shows the WellCare web application interface. On the left sidebar, the 'Agent History' menu item is highlighted with a red box, and the 'Statements' sub-tab is also highlighted with a red box and a red arrow. The main content area displays a table of statements. The table has three columns: 'Member Effective Year', 'Member Effective Month', and 'Statement Date'. The first row of the table is highlighted in blue, and a red box is drawn around the 'Member Effective Month' cell of this row. The table contains 20 rows of data, each representing a statement for the year 2019.

Member Effective Year	Member Effective Month	Statement Date	Statement
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

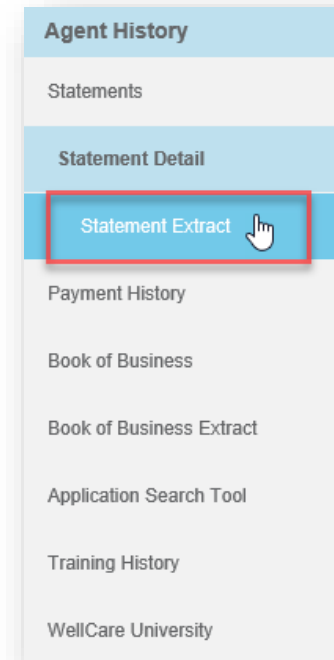
COMMISSIONS

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**.

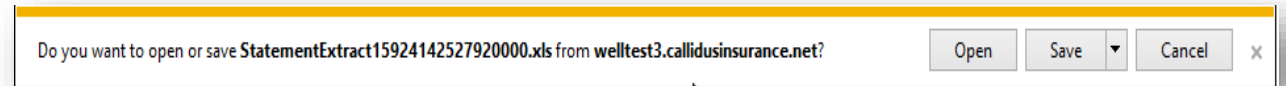
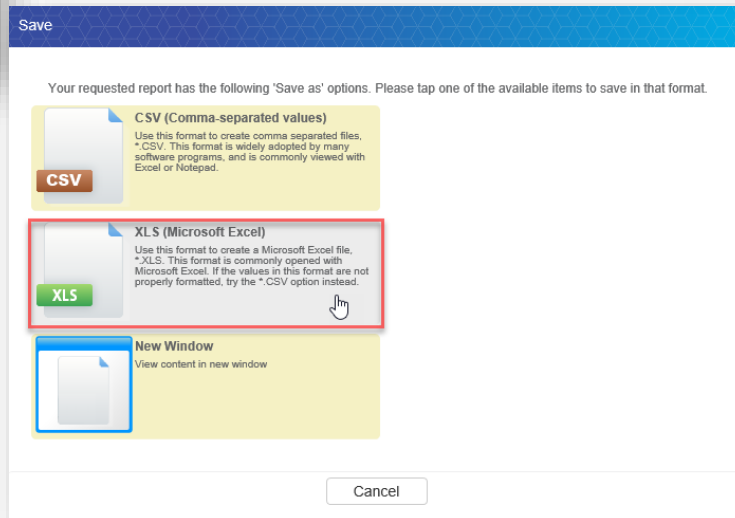
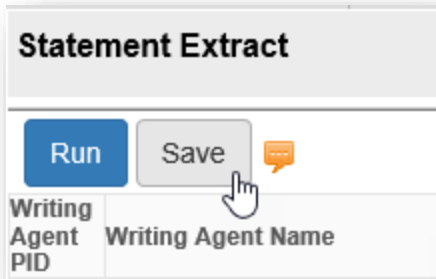


COMMISSIONS

DOWNLOADING STATEMENT EXTRACT

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

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

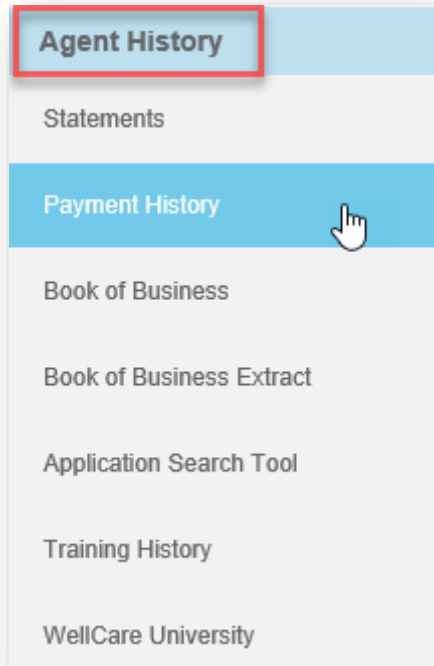


COMMISSIONS

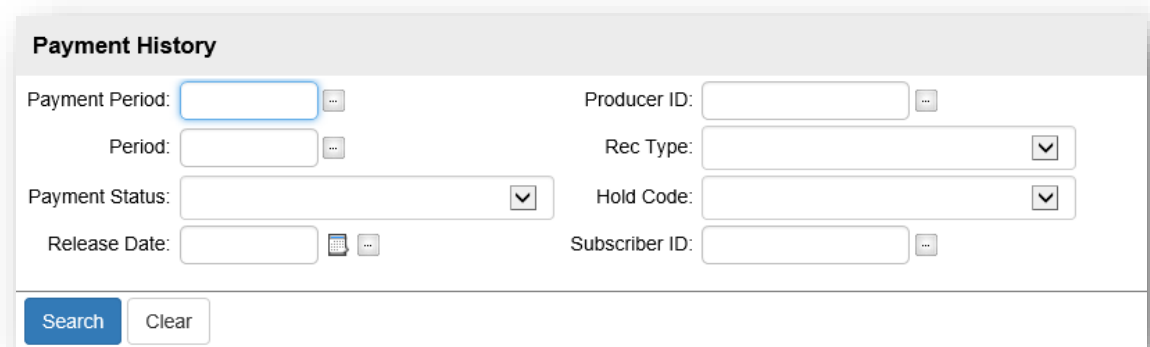
VIEWING PAYMENT HISTORY

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.**


A screenshot of a search form titled "Payment History". The form contains several input fields and dropdown menus: Payment Period (text box), Producer ID (text box), Period (text box), Rec Type (dropdown menu), Payment Status (dropdown menu), Hold Code (dropdown menu), Release Date (text box with a calendar icon), and Subscriber ID (text box). At the bottom of the form are two buttons: "Search" and "Clear".

COMMISSIONS

VIEWING PAYMENT HISTORY

Step 3: The information will populate.

The screenshot shows a 'Payment History' search form with various filters and a table of results. The form includes fields for Payment Period, Producer ID, Rec. Type, Payment Status, Hold Code, Release Date, and Subscriber ID. Below the form is a table with columns for Producer ID, Producer Name, Period, Subscriber ID, Member Name, Product, Signed Da, CMS Cont, FBP, HICN, Oed, Effective C, Terminatio, Cycle Yea, Member P, Market, Plan Type, Commissr, Voucher R, Release D, and Adjustmen. The table contains multiple rows of data, with some rows highlighted in red.

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**.

The screenshot shows the 'Export Data Form Search Form' dialog box. It has two main sections: 'Export Data Selection' and 'Format'. In the 'Export Data Selection' section, the radio button for 'All records matching search criteria (limited to 75000)' is selected and highlighted with a red box. The 'Format' section has a checked box for 'Include Header Row?' and the radio button for 'Excel 97-2003 (*.xls) (limited to 65536)' is selected. At the bottom, the 'Ok' button is highlighted with a red box and a mouse cursor is pointing at it.

Step 5: Open or Save the Excel download.

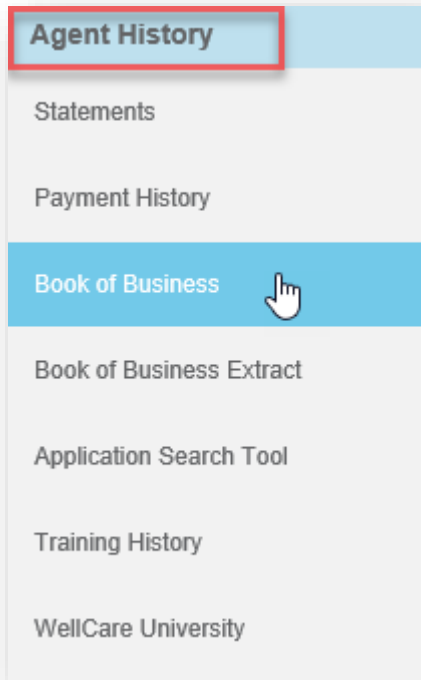
The screenshot shows a file save dialog box with the text: 'Do you want to open or save BrokerHistoryBrokerPortalSF115924176795110000.xls (9.50 KB) from wellcare.callidusinsurance.net?'. The 'Open' and 'Save' buttons are highlighted with a red box.

COMMISSIONS

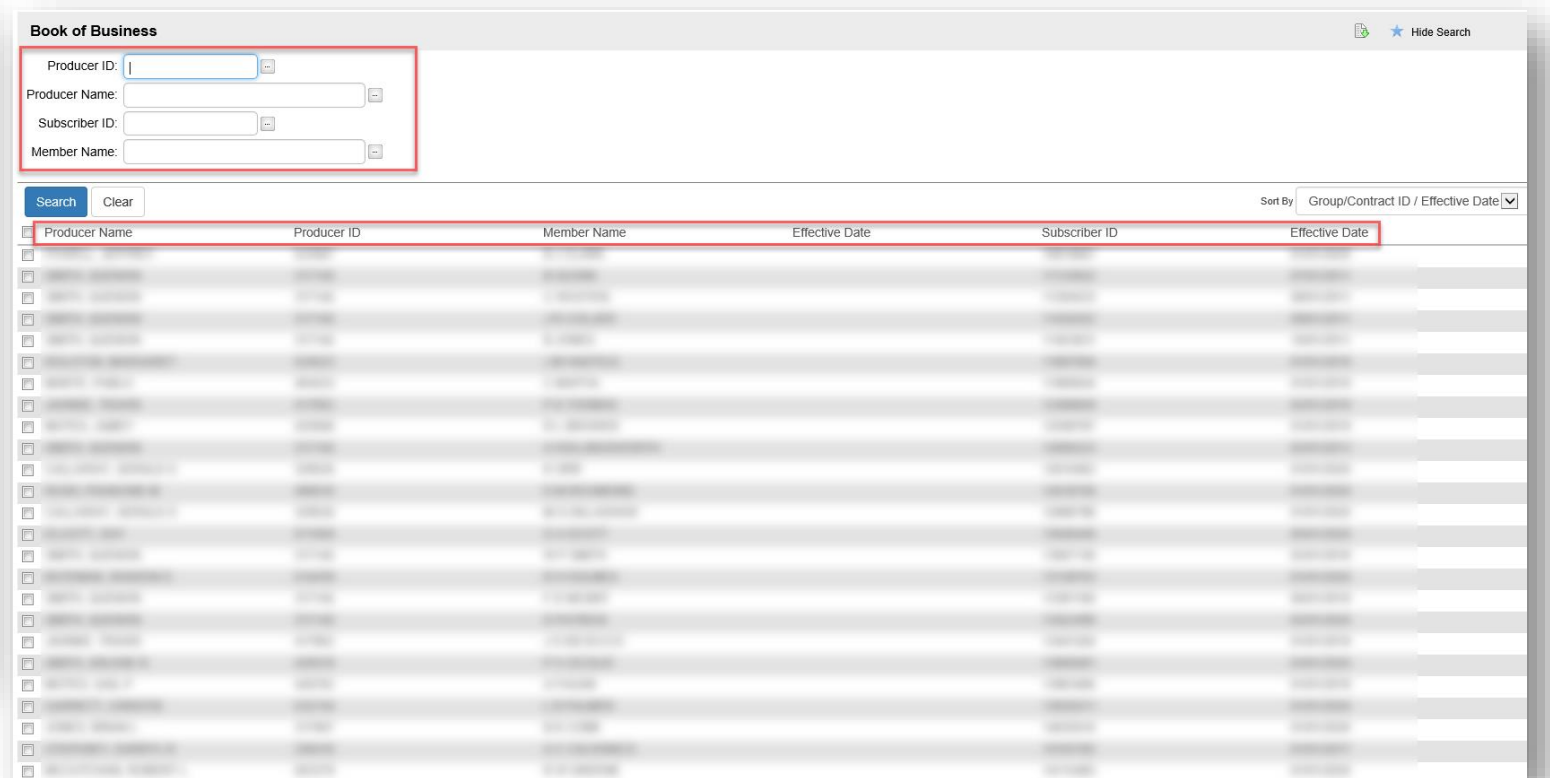
VIEWING YOUR BOOK OF BUSINESS

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

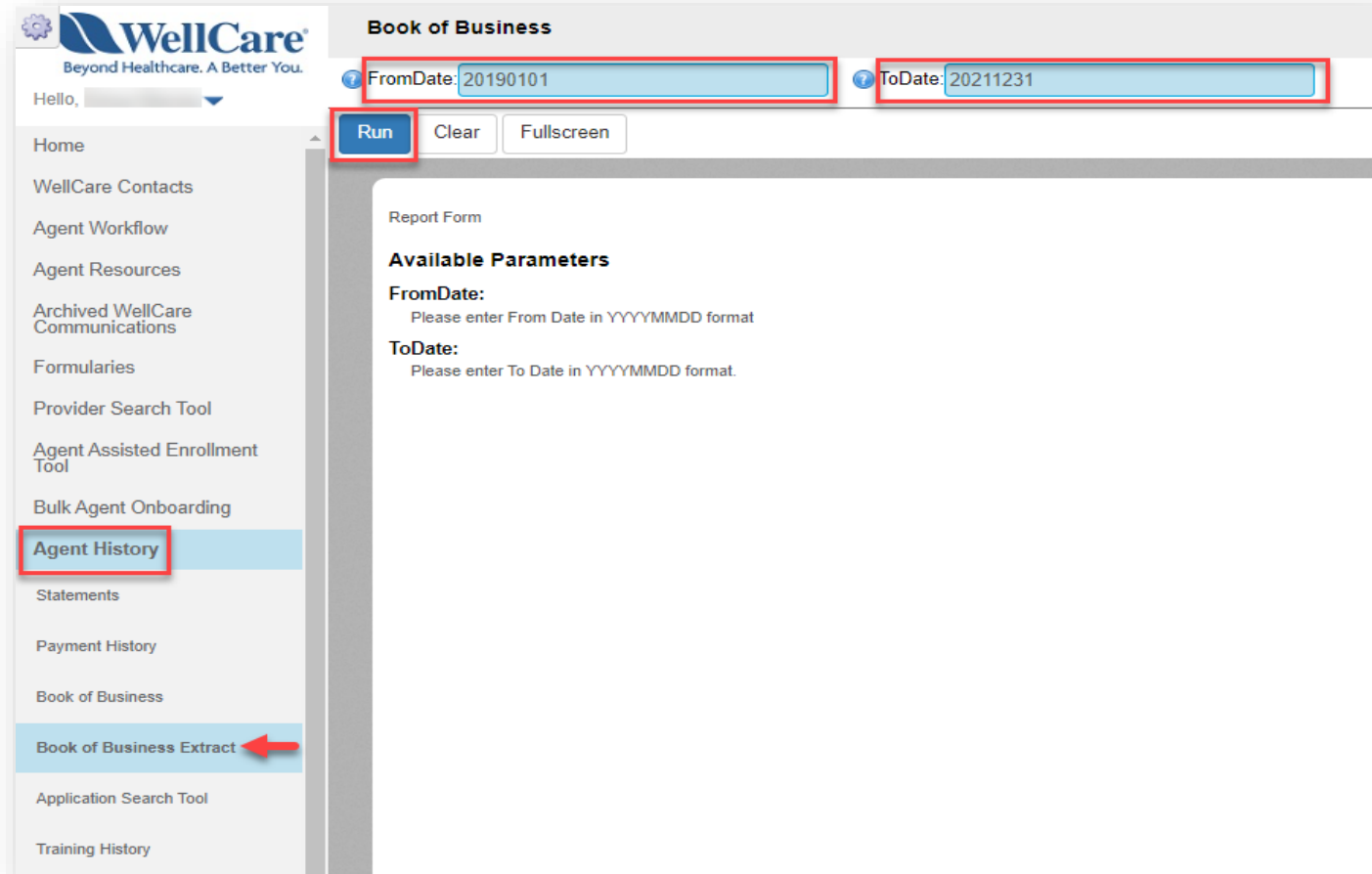
Within the Agent History tab in Agent Connect you have the ability to download your **Book of Business**. Take the following steps to export:

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.

The screenshot displays the WellCare 'Book of Business' interface. At the top left is the WellCare logo with the tagline 'Beyond Healthcare. A Better You.' and a user greeting 'Hello, Sonya Massey'. Below the logo is a navigation menu with items: Home, WellCare Contacts, Agent Workflow, Agent Resources, Archived WellCare Communications, Formularies, Provider Search Tool, Agent Assisted Enrollment Tool, Bulk Agent Onboarding, **Agent History** (highlighted with a red box), Statements, Payment History, Book of Business, and **Book of Business Extract** (highlighted with a red box). The main content area is titled 'Book of Business' and contains a toolbar with buttons: Run, Clear, Fullscreen, Send, and **Save** (highlighted with a red box and a red arrow). Below the toolbar is a table with columns: Broker ID, Broker Name, Policy Number, Member ID, Member Name, CMS Contract #, Policy Effective Date, Policy Termination Date, HICN, Member DOB, Member Phone, Member Address, Member Address 2, Member City, Member State, Member Zip, and Pol>Status. A 'Save' dialog box is open in the bottom right corner, titled 'Save'. It contains the text: 'Your requested report has the following "Save as" options. Please tap one of the available items to save in that format.' The dialog lists three options: 'CSV (Comma-separated values)', 'XLS (Microsoft Excel)', and 'New Window'. The 'XLS (Microsoft Excel)' option is highlighted with a green box. A 'Cancel' button is at the bottom right of the dialog.



AGENT CONNECT USER GUIDE

AGENT PROFILE CHANGES

AGENT PROFILE CHANGES

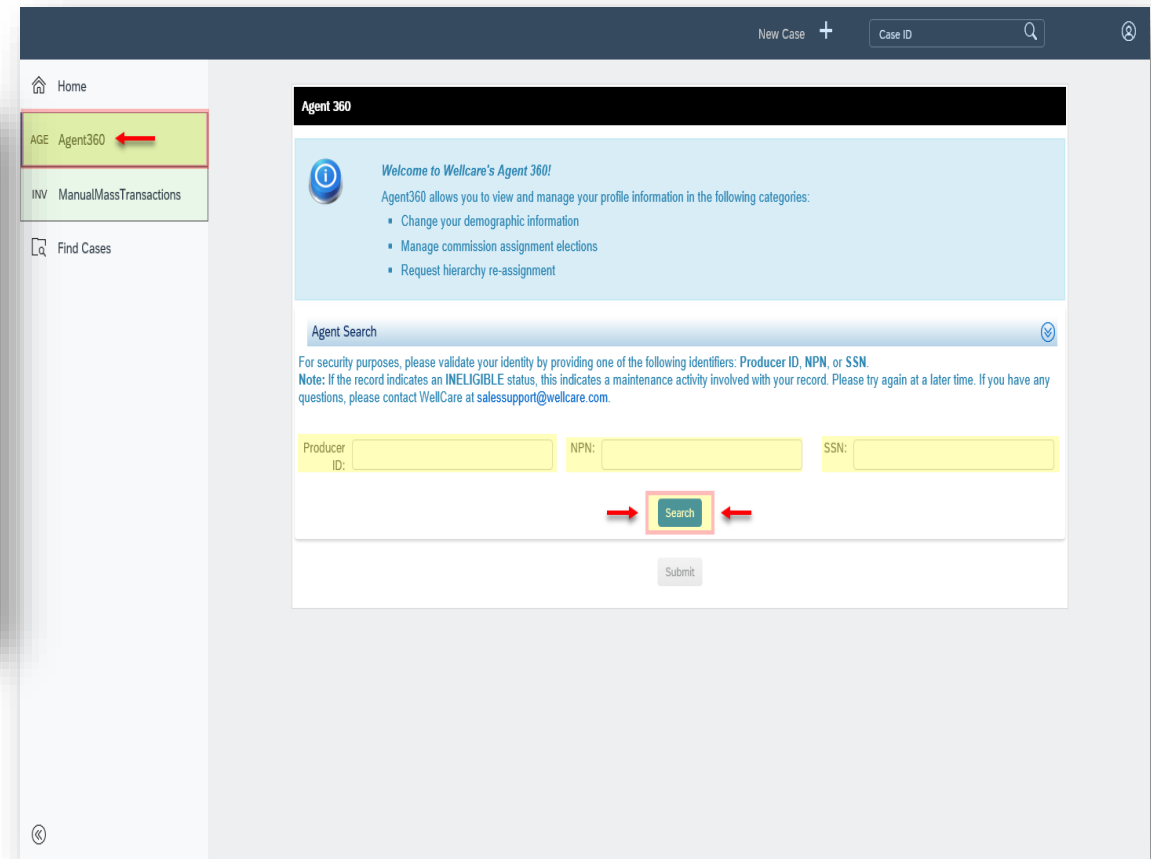
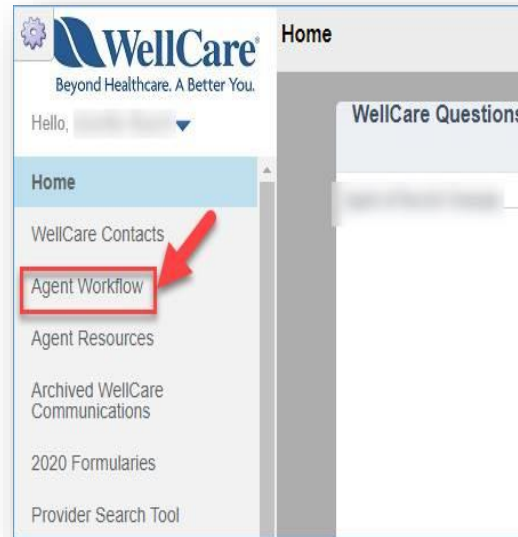
AGENT 360 VALIDATION

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 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: 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

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.

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 Producer ID: [REDACTED]

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: [REDACTED]
Producer ID: [REDACTED]

Request Assignment Change

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

Request Transfer

Assignment Summary

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**

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 Wb 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
[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

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**

Commission Assignment

Below is your current assignment information.

Name: [REDACTED]
Producer ID: [REDACTED]

Request Assignment Change

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

Request Transfer

Assignment Search

You can choose the options below to change the assignment of your commissions. If you choose the **Other Hierarchy** option, you can search for your proposed new commission assignment using the entity's **Producer ID, First Name, or Last Name** and clicking the **Search** button. Upon choosing your proposed new commission assignment, confirm the change by clicking the **Confirm Request** button.

Self My Upline Other Hierarchy

Confirm Assignment

Confirm Assignment Change

You can confirm the change to your assignment by clicking the **Confirm Request** button below.

Confirm Request

Assignment Summary

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**

HIERARCHY & COMMISSION ASSIGNMENT CHANGES

COMMISSION ASSIGNMENT – COMPLETE

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



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

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: 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.

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

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 Producer ID: N/A

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.

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

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

Review and Submit

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

Please take a moment and verify that the information displayed is accurate.

Process Id: Agent 360-SelfServ-1261

Agent Summary

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

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	[Redacted]	[Redacted]	FMO	[Redacted]	[Redacted]
Commission Assignment	CURRENT	[Redacted]	[Redacted]	PDCR	300014	WELLCARE FMO

Producer Demographics

Please review the information below for accuracy.

Principal Information

Legal First Name: [Redacted] Date of Birth: [Redacted] SSN: [Redacted]
MI: [Redacted] Email: Michiedavla212@gmail.com NPN: [Redacted]
Legal Last Name: [Redacted] Nickname: [Redacted]

Address Information

Please verify your address information below before continuing.

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

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

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**

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 WellCare Sales 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	[REDACTED]	[REDACTED]	FMO	[REDACTED]	[REDACTED]
Commission Assignment	CURRENT	[REDACTED]	[REDACTED]	PDCR	300014	WELLCARE FMO

Producer Demographics

Please review the information below for accuracy.

Principal Information

Legal First Name: [REDACTED]	Date of Birth: [REDACTED]	SSN: [REDACTED]
MI: [REDACTED]	Email: Michiedavila212@gmail.com	NPN: [REDACTED]
Legal Last Name: [REDACTED]	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 **Agent Support** by calling **(866)822-1339**

Monday through Friday

8am to 8pm ET

- Or -

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