CENTENE Workbench

wellcare™

Completing an Invitation for a Broker to Onboard

Broker and Agency Guide

Last updated: Mar 31, 2022- NK

Purpose of this Document

With this guide, all brokers and agencies will be able to:

- Fully complete an invitation and fully certify to get Centene Workbench portal access

Icon Use:

Icon	Function
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Receiving Email Invitation and Logging into PingOne

Receiving Email Invitation and Logging into PingOne

1. An email invitation will be sent from **centene@evolvenxt.com**, which also includes instructions for PingOne set up

Dear Broker,

You have been invited to onboard as a 1099 Broker with Wellcare.

To login and complete your contract you will need to create a PingOne Single Sign-On portal. Please access the URL below and utilize the following login credentials to complete your registration.

Username: [NPN]

Password [ ]

Portal URL: https://desktop.pingone.com/cnc-workbench-brk

Centene Workbench

Once you have registered click on the Workbench icon to begin contracting.

Note: All mandatory fields must be completed prior to submission.

If you are unable to access the registration website or have any questions regarding the process, please contact your local Sales Leader or call Broker Services at 866-822-1339.

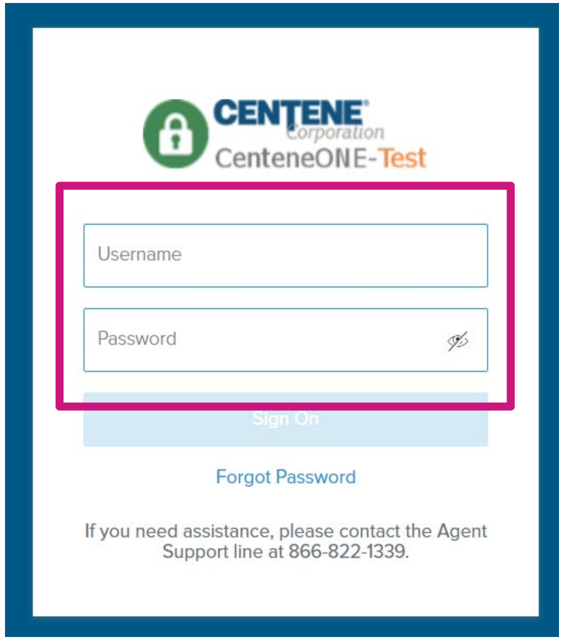
Thank you for your interest in WellCare!

Regards,

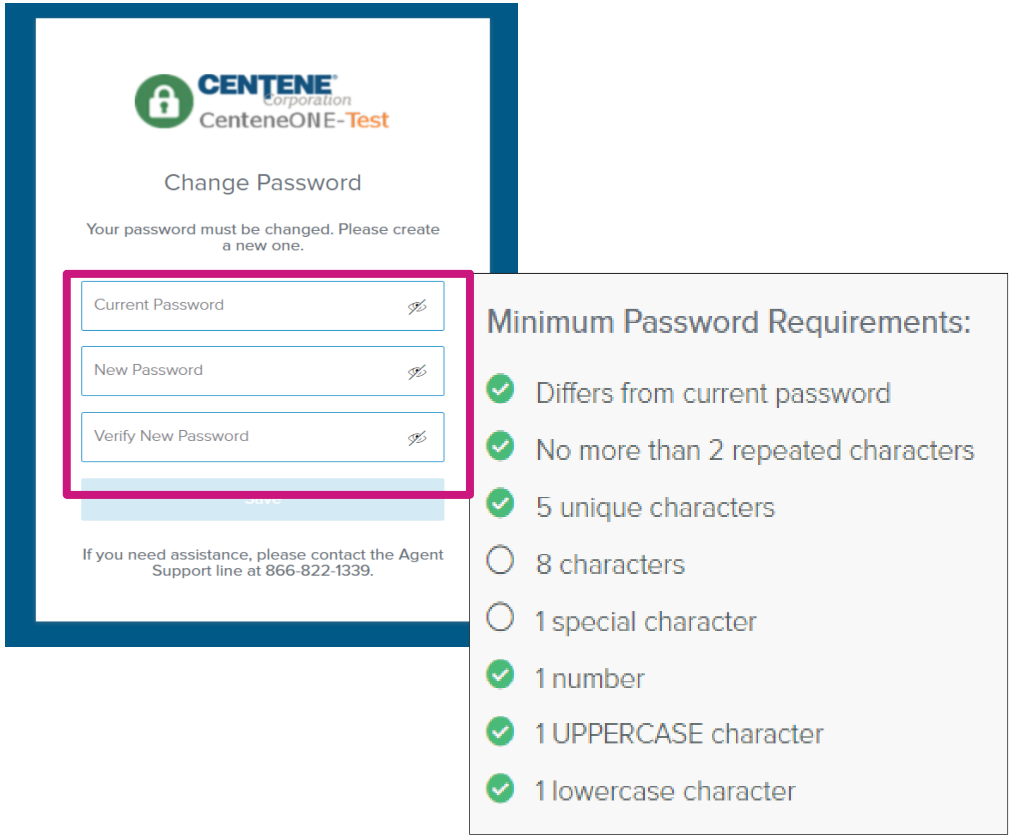
Sales Support

Receiving Email Invitation and Logging into PingOne

2. Select the portal URL link in the email, which will redirect to the Single Sign-On page
3. Type your **Username** (this will be the **National Provider Number (NPN)**) and **temporary password** provided in the invite email
4. Select **Sign On**

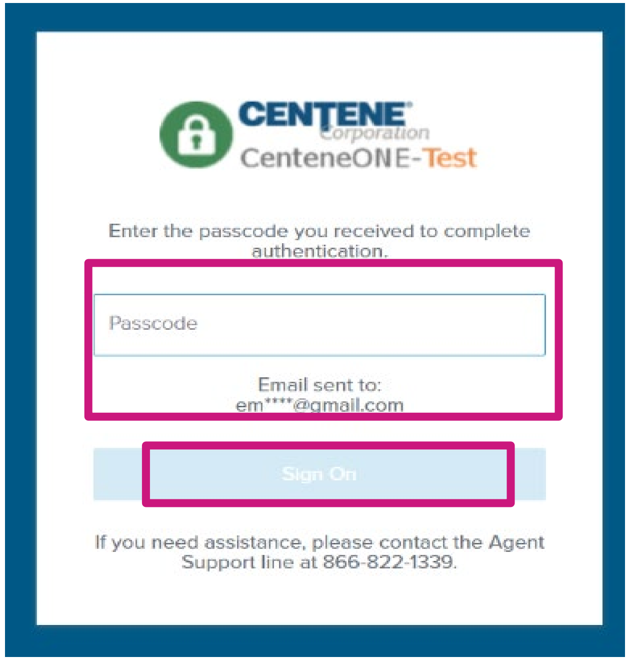


5. The following screen will populate. Enter the provided temporary password in the **Current Password** field and then update your password in the **New Password** and **Verify Password** fields (Please see below for password requirements)



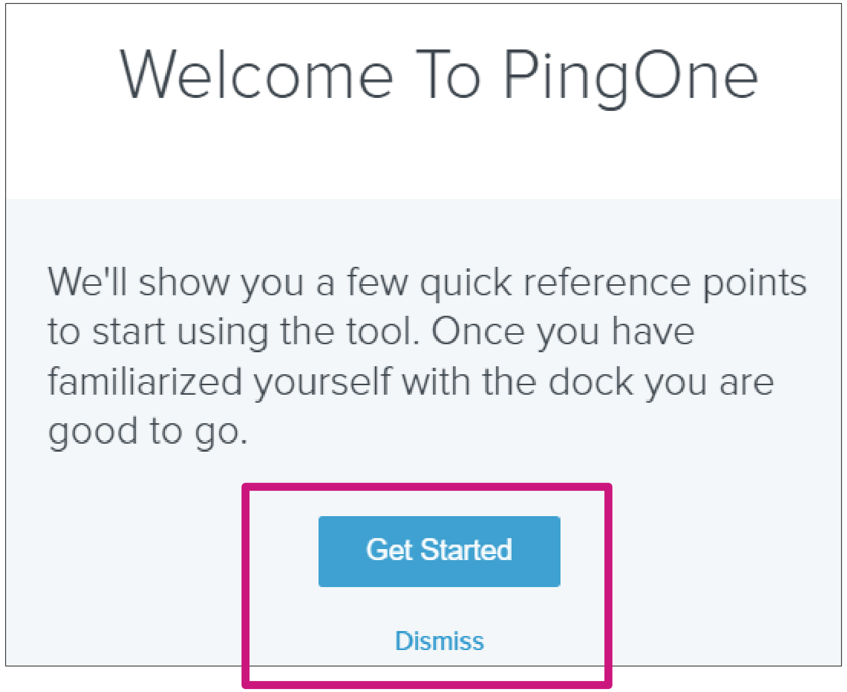
Receiving Email Invitation and Logging into PingOne

6. Select **Save** once new password is entered
7. You will receive an authentication code by email after updating your password
8. Enter the Authentication code and select **Sign On**



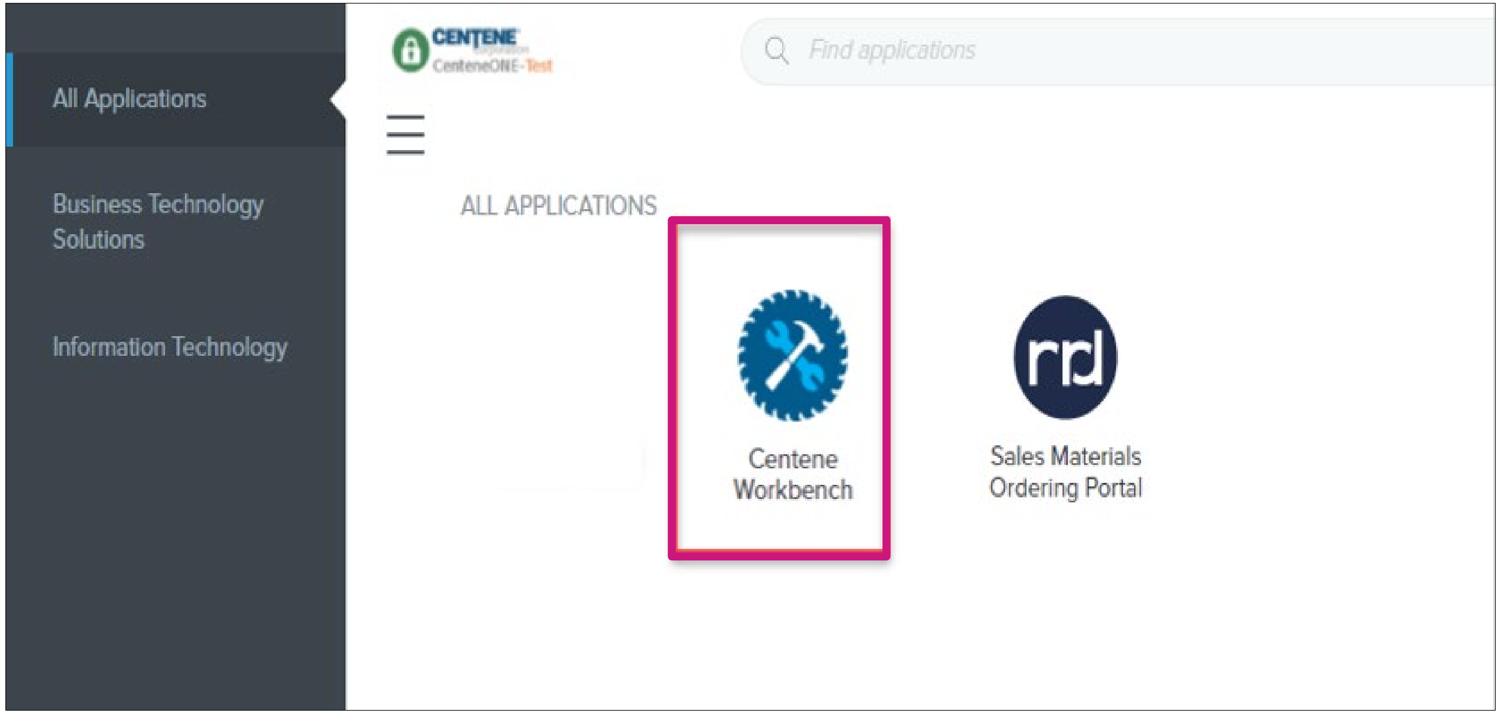
9. The following screen will appear. You are now successfully registered to use PingOne

Note: You can select **Get Started** for a quick tutorial on using PingOne, or **Dismiss** to skip this step.



Receiving Email Invitation and Logging into PingOne

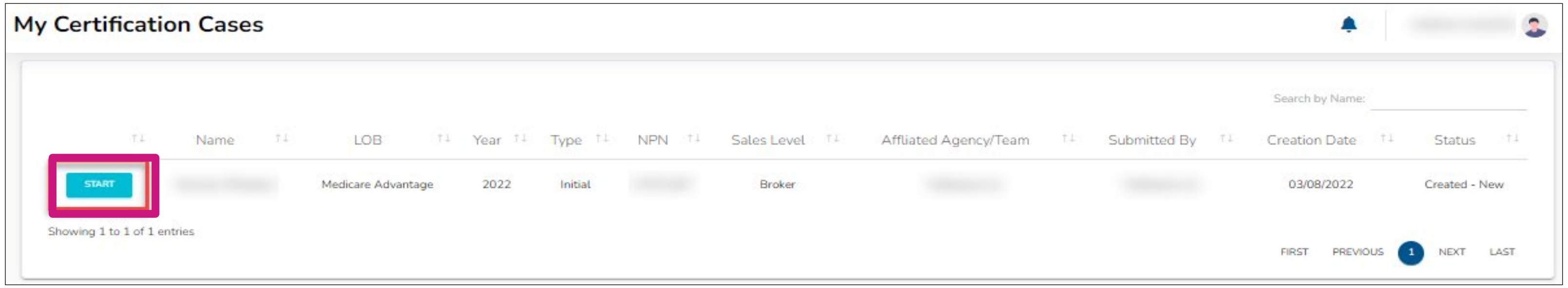
10. In the main dashboard, select the **Centene Workbench** icon to get started



Completing A Contract

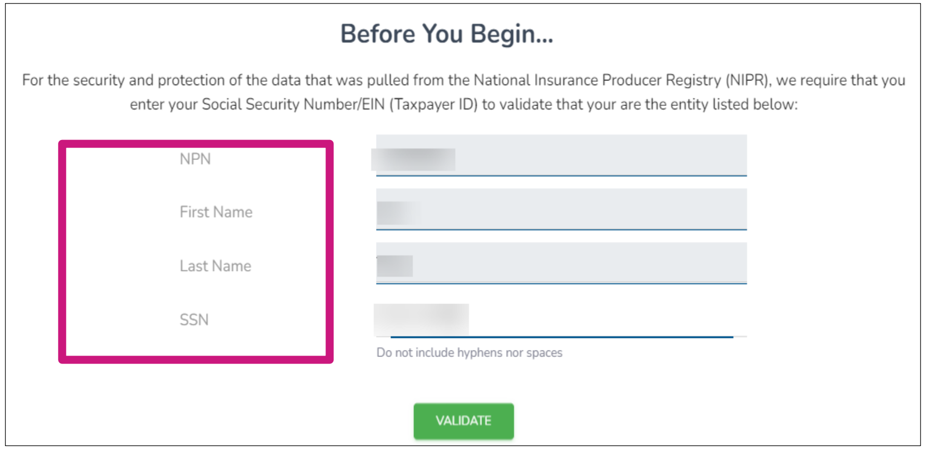
Completing A Contract

1. Once logged into **Centene Workbench**, you will see the pending contract to complete
2. Select **Start**



3. When beginning the contract, you will need to validate your **Social Security Number (SSN)/Tax Identification Number (TIN)** against the NPN provided in your initiation. The NPN will be prepopulated. Enter in your SSN/TIN and select **Validate**

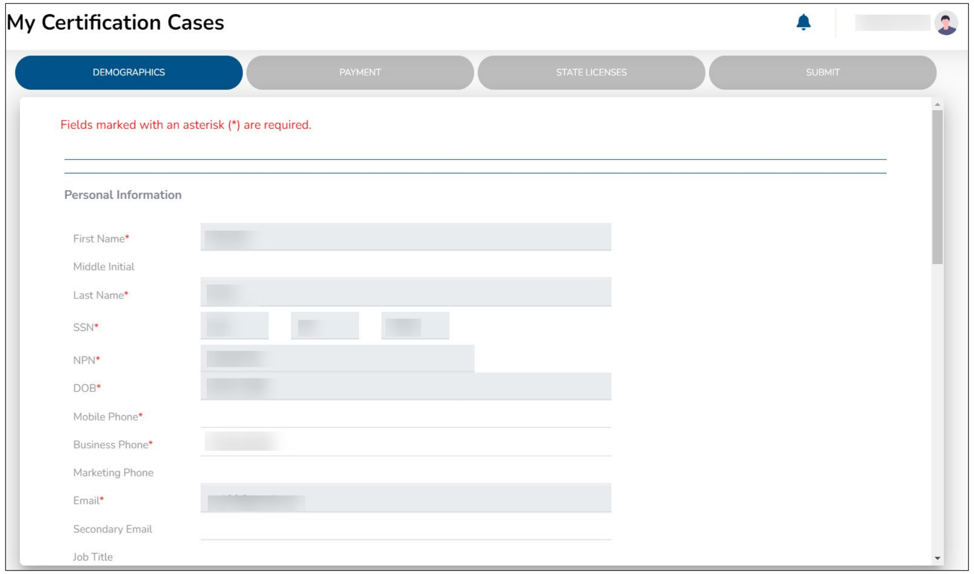
   Note: After validating, you will view a dashboard with tabs to enter **Demographics, Payment, and State Licenses** information before selecting the **Submit** tab.

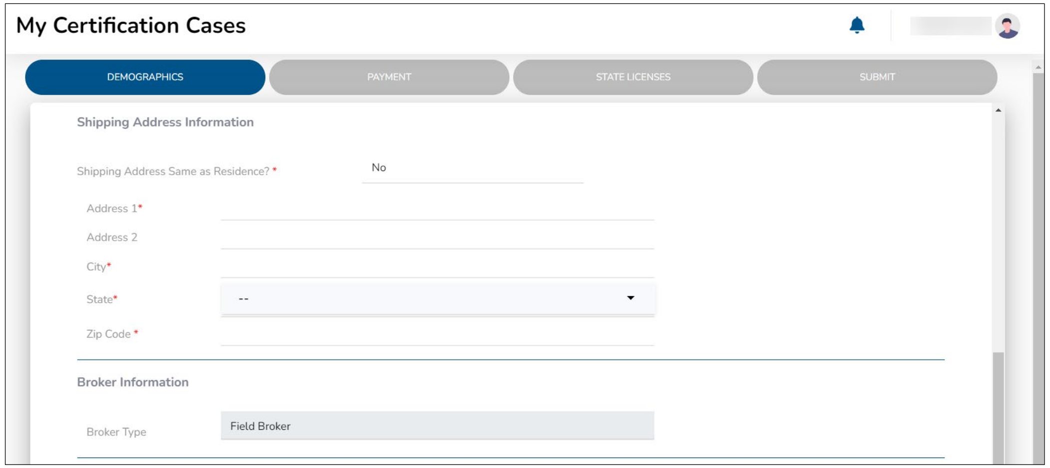


Completing A Contract: Demographics

1. Select the **Demographics** tab under **My Certification Cases**
2. Your demographics information will automatically load in from NIPR
3. Ensure to add the following information in your Demographics:
    - **Mobile Number:** Required
    - **Secondary Email:** Optional
    - **Shipping Address**
        - Select **Yes** if Shipping Address is the same as Residence Address. It will then automatically populate based on Residence Address
        - Select **No** if Shipping Address is different from Residence Address. You will be prompted to complete Shipping information.

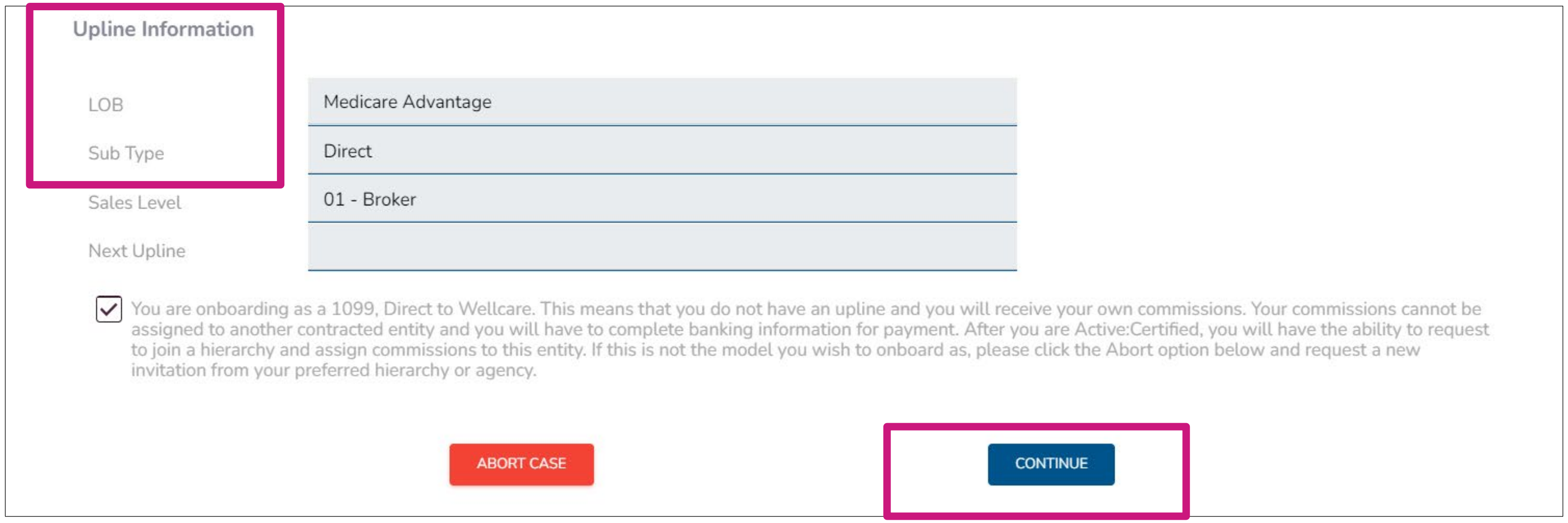
          Note: Please do not use a PO Box for Shipping Address.





Completing A Contract: Demographics

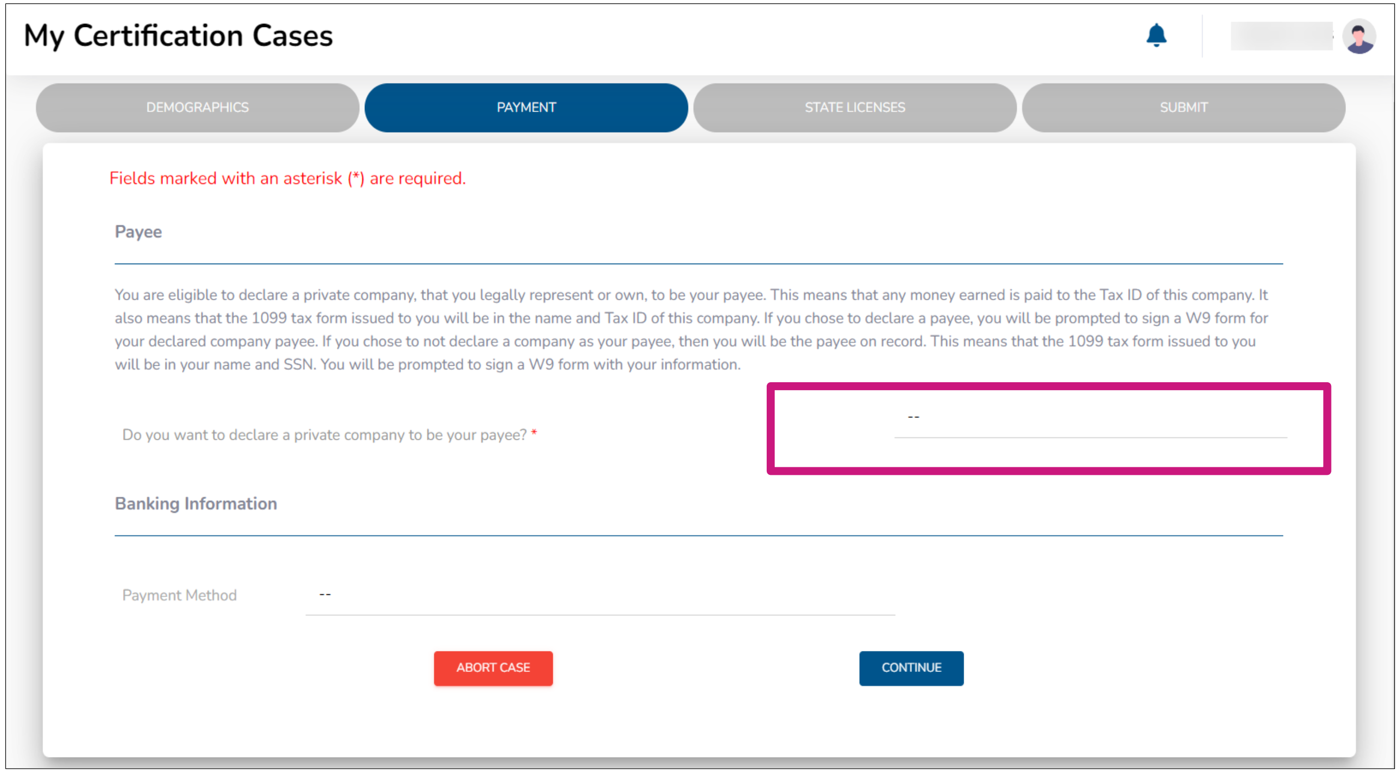
4. Once you have completed all demographic information, please review your **Upline** and **Sub Type** information
5. When you have confirmed this information is correct, please check the box acknowledging you understand, and then select **Continue**



Completing A Contract: Payment

Direct and Downline Only Sub Type Payment Steps

1. Select the **Payment** tab under **My Certification Cases**
    - Select **Yes** if you have a private company that you would like to assign as the Payee
    - Select **No** if you do not wish to declare a private company to be the Payee



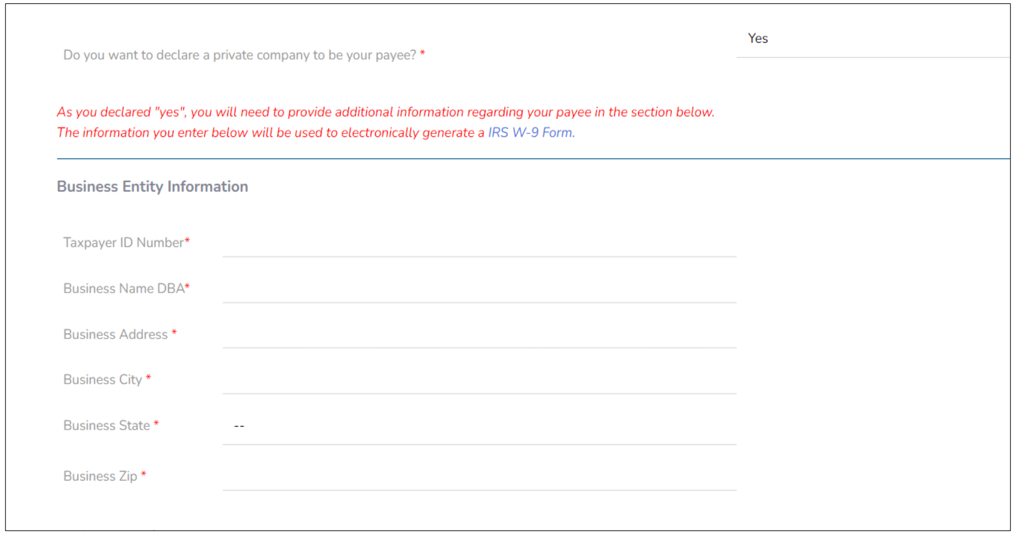
Completing A Contract: Payment

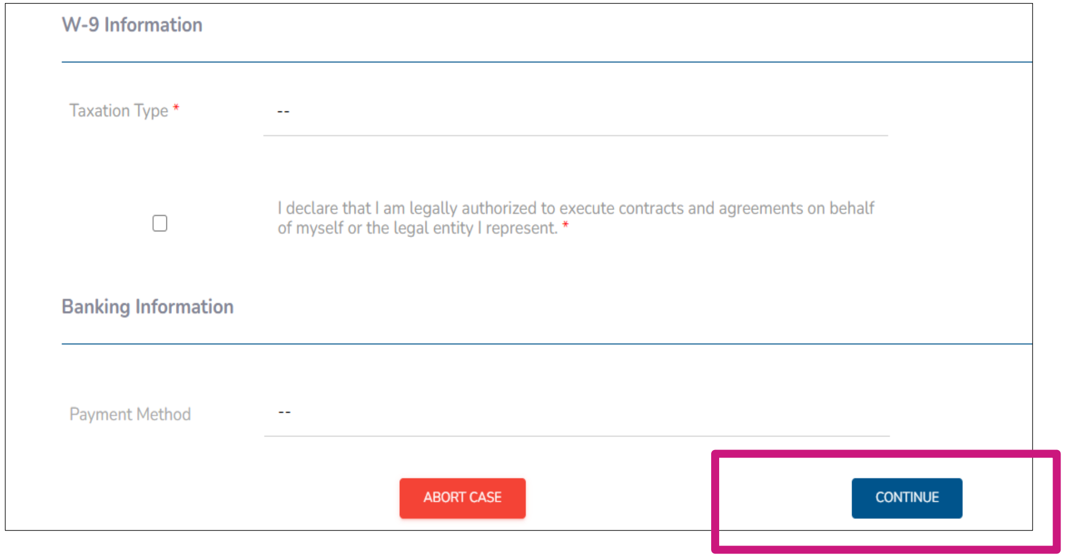
Direct and Downline Only Sub Type Payment Steps

Pay Entity Assignment

- If you selected **Yes**, provide the required payment information for this entity as well as a W9

  Note: If you declare a private company as your payee, your 1099 will be in the name of that entity.
- Once all information is provided, select **Continue**



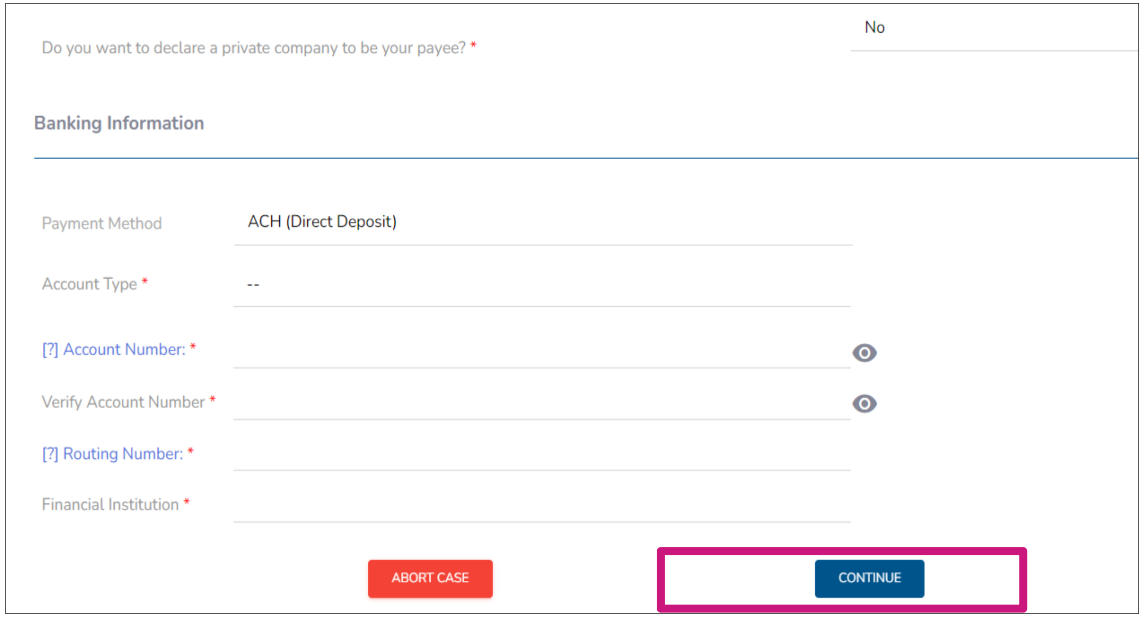


Completing A Contract: Payment

Direct and Downline Only Sub Type Payment Steps

No Pay Entity Assignment

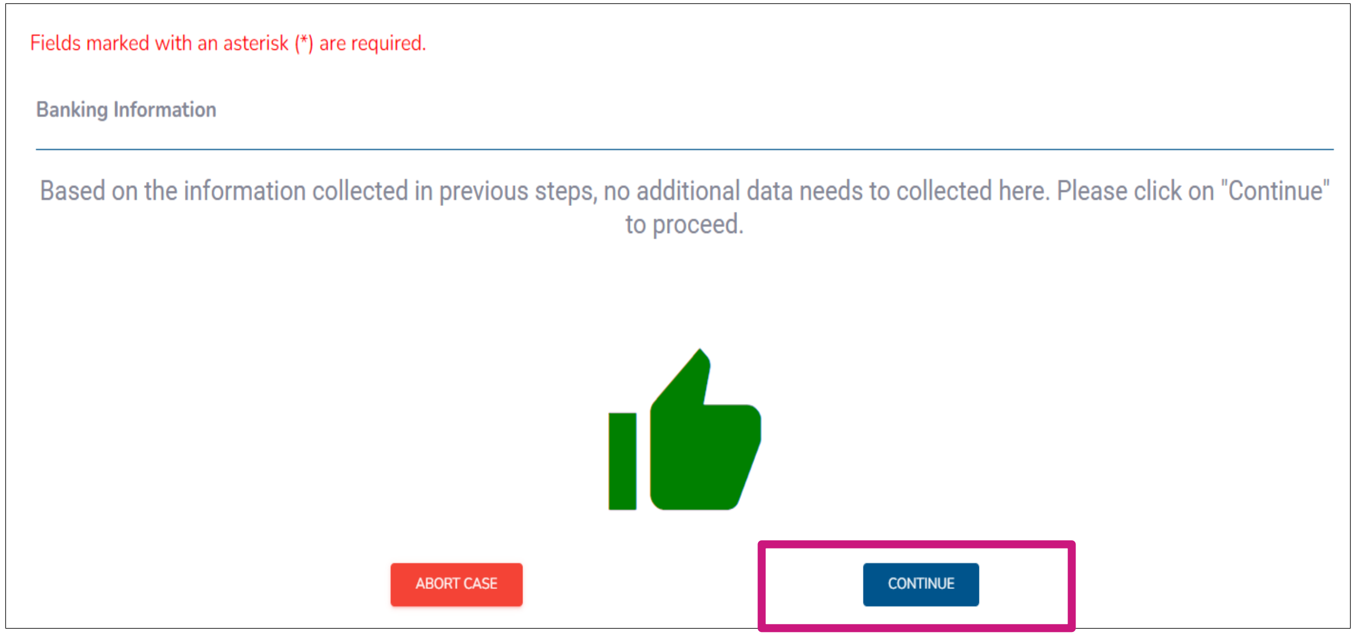
- If you selected **No**, provide the required payment information for yourself as well as a W9 in your name
- Once all information is provided, select **Continue**



Completing A Contract: Payment

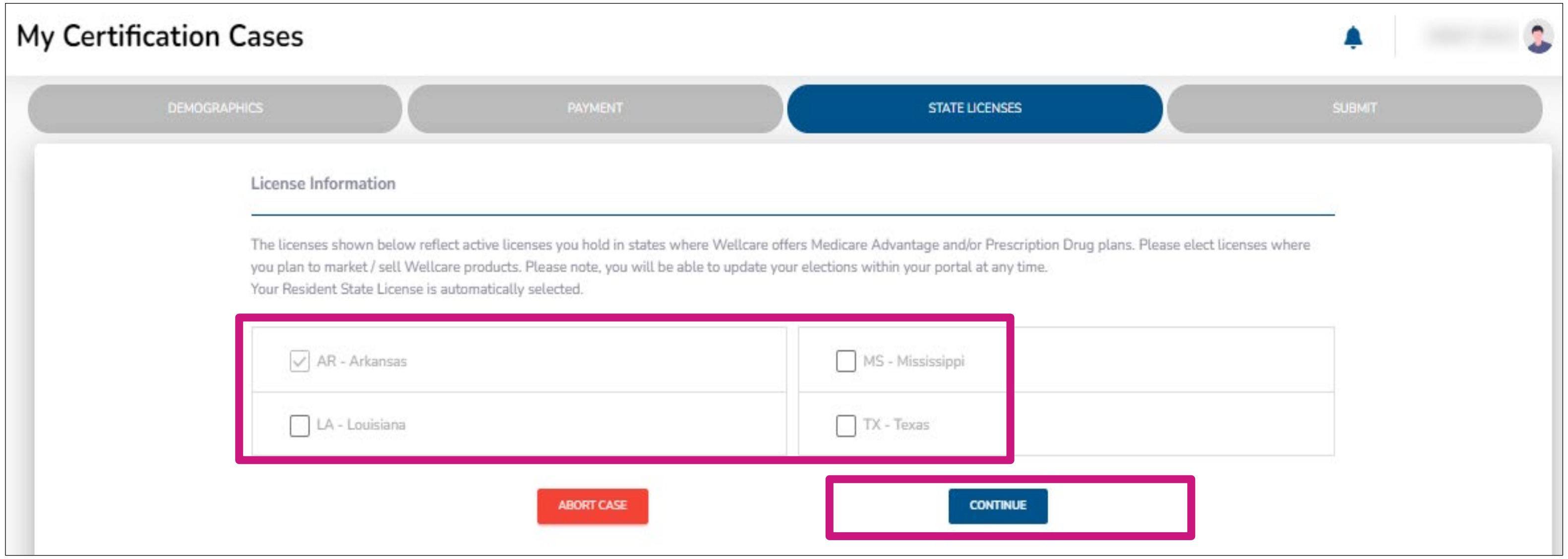
Licensed Only Agent and Dual Assignment Sub Type Payment Steps

- For the abovementioned Sub Types, commissions are assigned to the Upline and no payment information is required
- No actions are required during this step. Select **Continue**



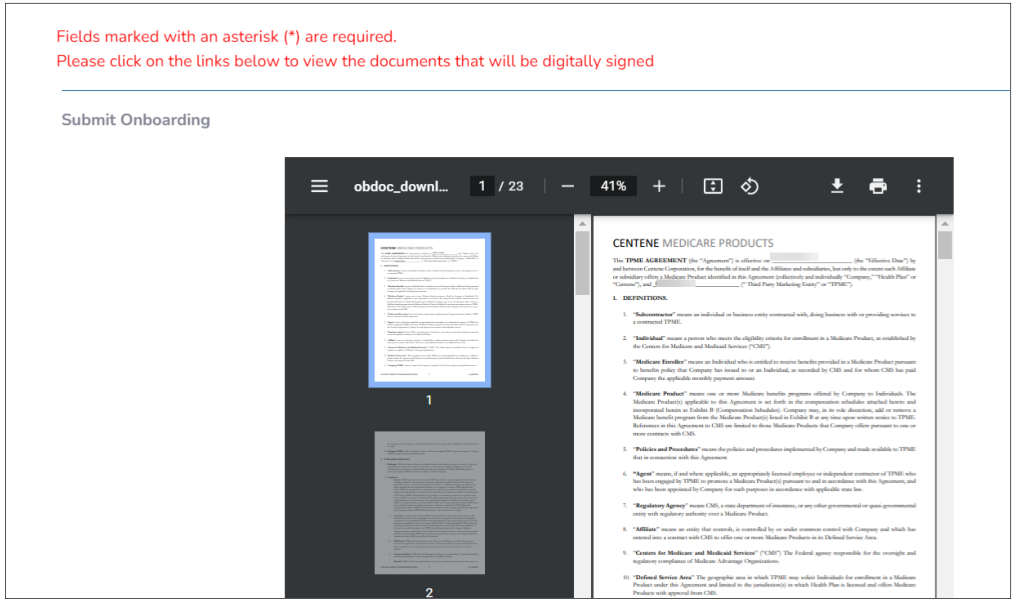
Completing A Contract: State Licenses

1. Select the **State Licenses** tab under **My Certification Cases**
2. Your Resident state license is automatically selected for you. You can also select all licenses that you wish to market and sell Wellcare products in
3. Once license has been reviewed, select **Continue**



Completing A Contract: Submit

1. Prior to submitting this onboarding case, you will be able to review the TPME document and your W9
2. You can save or print these documents at this time. The documents will also load into your broker profile within the portal
3. To submit your onboarding case, review and acknowledge the statements below. Use the open space to complete your signature, and then select **Submit**



Onboarding Completed

Onboarding Completed

Once you have successfully submitted your onboarding case, you will receive the following message regarding next steps. You will also be given the ability to save the W9 and TPME contract again.

Note: If you are onboarding as an agency, continue to the next section for additional requirements.

Submission Successful!

Thank you for submitting your contract.

Below is a copy of your signed contract and W9. Please download and/or print a copy for your records. If you complete certification requirements, you will be able to view your contract in your portal as well.

Within the next 24 hours, you will receive a communication regarding the Centene Learning Center and instructions to complete certification requirements.

Once all certification requirements are met, you will become Active:Certified and will be ready to sell.

Download Contract

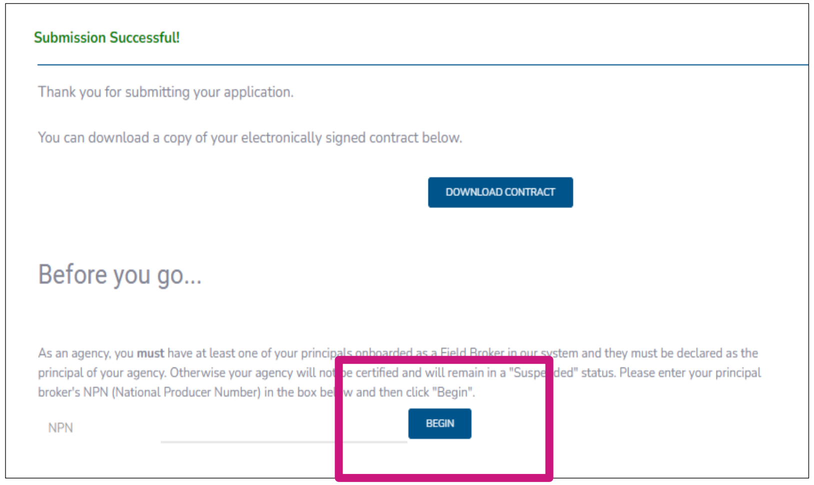
Download W-9

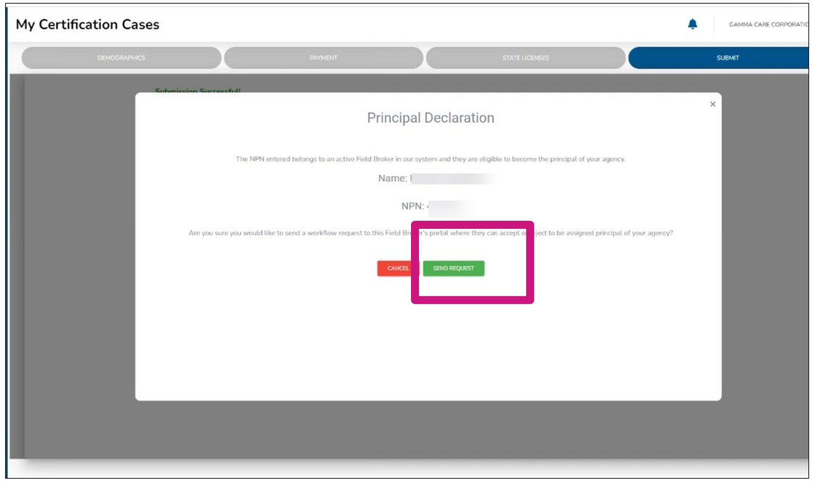
Broker Name	
Email	
NPN	

Agency Onboarding Additional Requirements

Agency Onboarding Additional Requirements

1. If you onboarded as an Agency, you will be asked to add a principal
2. Enter the NPN and select **Begin**
   - If the broker you want to be added as your principal is already contracted, a pop-up window will appear with a Principal declaration
     - If all the information is correct, select **Send Request**
     - The requested principal will receive a notification to either **approve** or **deny** the request
   - If the Broker you want to be added as your principal is not contracted, A new pop-up window will appear to create Principal Onboarding Case
     - Select **Selling** or **Non-Selling** contract type
     - Enter the principal's email
     - Once all information is entered, select **Create Case**

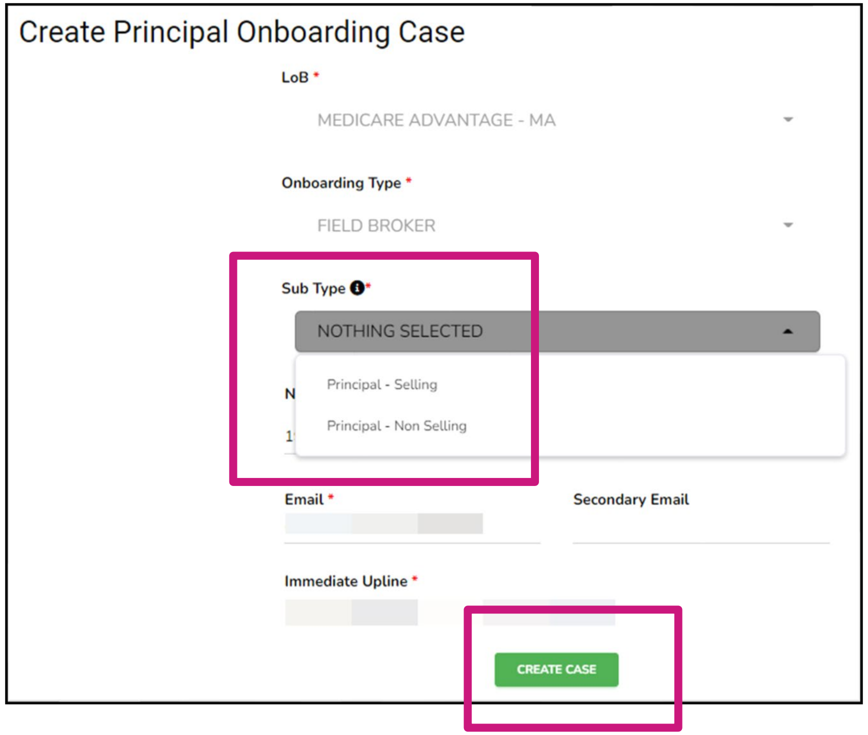




Agency Onboarding Additional Requirements

- If the Broker you want to be added as your principal is not contracted, A new pop-up window will appear to create Principal Onboarding Case
  - Select **Selling** or **Non-Selling** contract type
  - Enter the principal's email
  - Once all information is entered, select **Create Case**

Note: For additional information on contracting and managing Principal Brokers please reference the **Centene Workbench: Managing Principal Brokers - Agency Guide**.



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Questions?

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