CENTENE Workbench

wellcare™

Centene Workbench: Level 01

Portal Overview

Last updated: July 6th, 2023:MN

Table of Contents

Introduction

This document reviews the Level 01 Portal of Centene Workbench. The processes covered are a breakdown of the portal functions, self-service Workflows, and ticketing system within the portal.

Icon Use

Icon	Function
	Return to Table of Contents

CENTENE
Workbench

Dashboard

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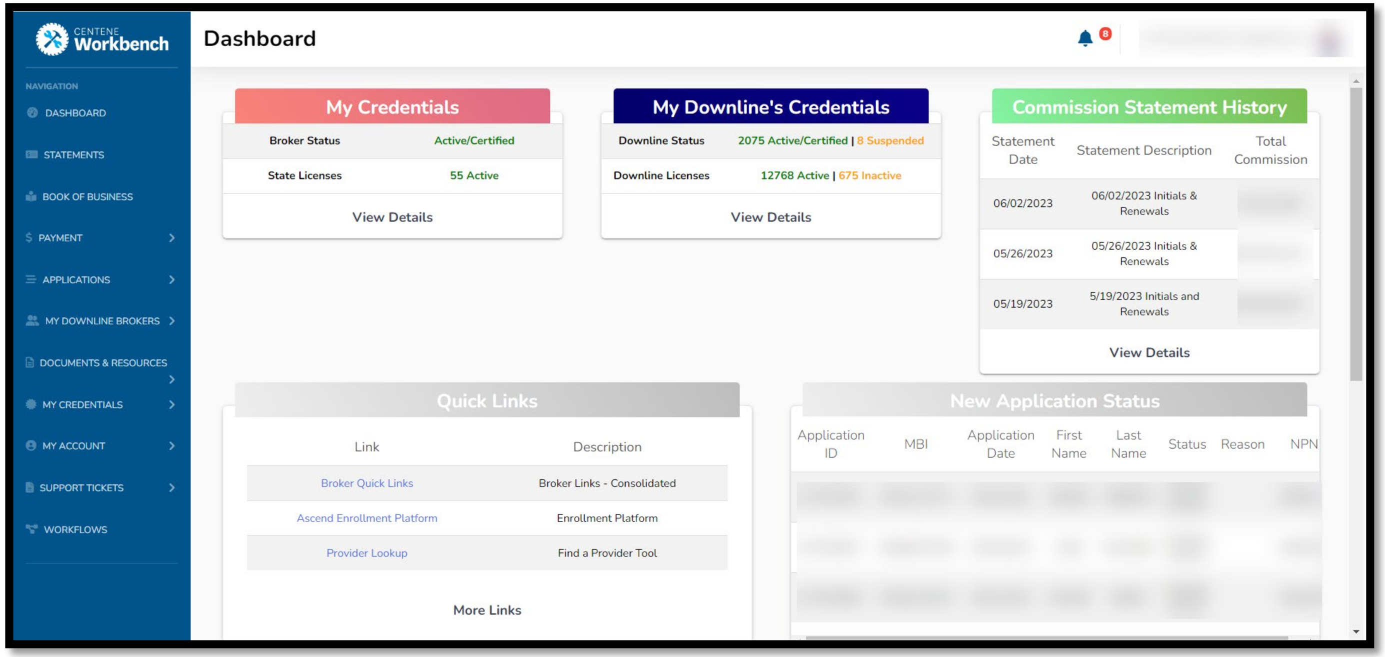
Dashboard

Overview

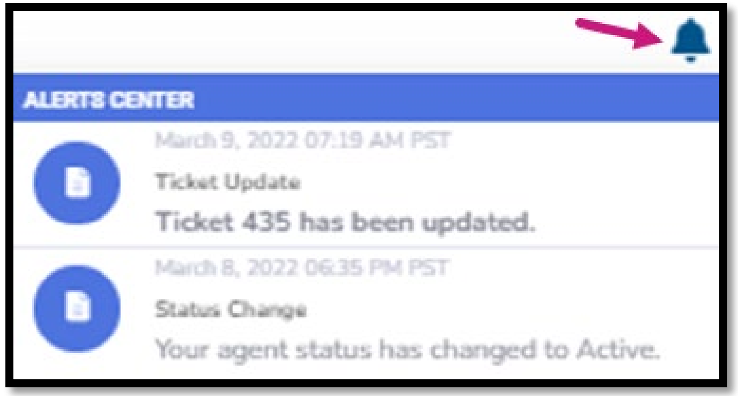
When you log in to the Centene Workbench, the dashboard will appear. Here you will be able to view alerts, a navigation menu and widgets that will help you to manage your business, status, and credentials.



Dashboard

Alerts

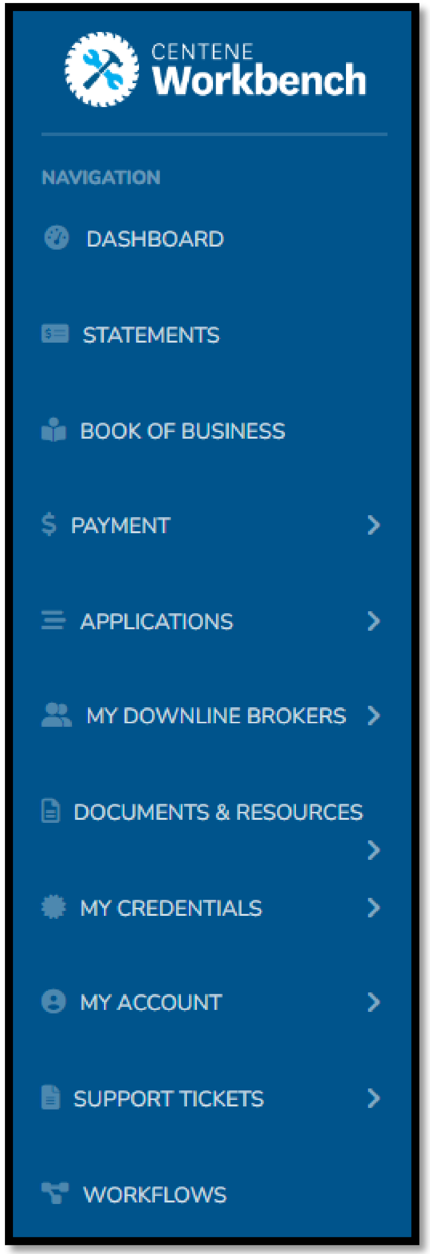
- To View a new alert or notification, refer to the red number next to the bell at the top of the Dashboard
- To see the notification, select the bell
- New unread notifications will be bolded
- To see more information, select the alert



Dashboard

Navigation Menu

On the left is your navigation menu. You can use the menu to view several types of information and perform processes related to your role.



Dashboard

Widgets

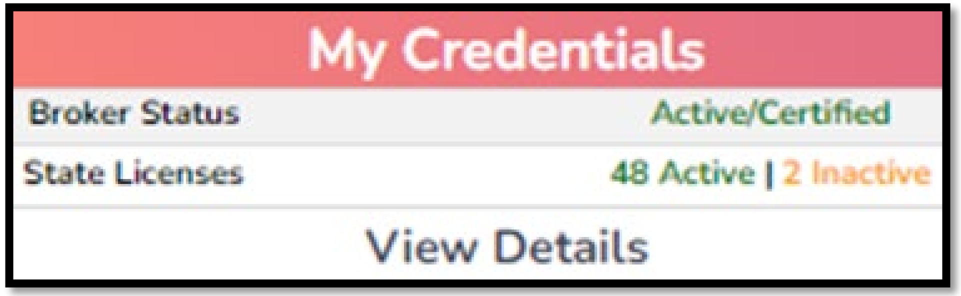
The Dashboard displays several widgets to help manage your business, status, and credentials.

My Credentials:

- Provides a summary of your status and state licenses

Commission Statement History:

- Provides a summary of recent commissions statement



Note: To see more information, select **View Details**.

Dashboard

Widgets

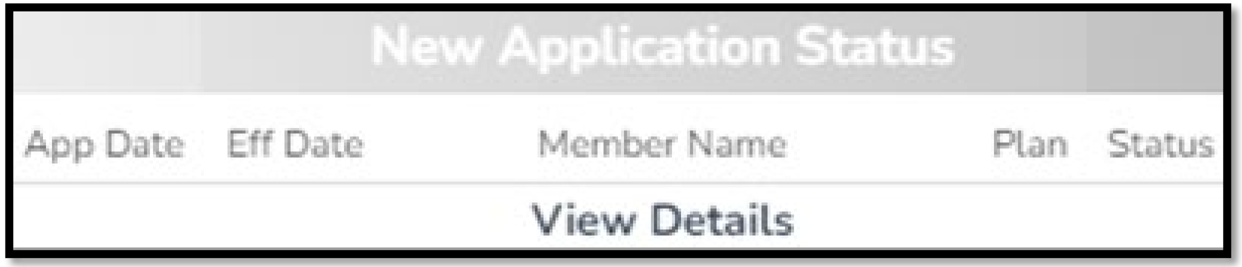
The Dashboard displays several widgets to help manage your business, status, and credentials.

Quick Links:

- **Provides quick access to many commonly used resources**

New Application Status:

- **Provides a summary of recently submitted applications**



Note: To see more information, select **View Details**.

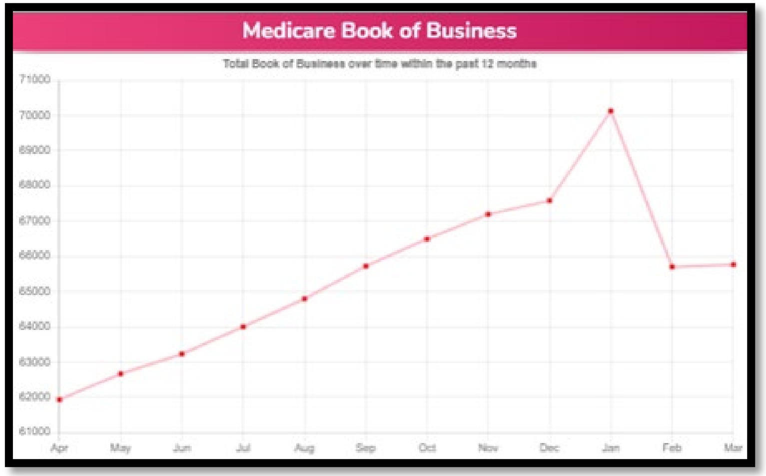
Dashboard

Widgets

The Dashboard displays several widgets to help manage your business, status, and credentials.

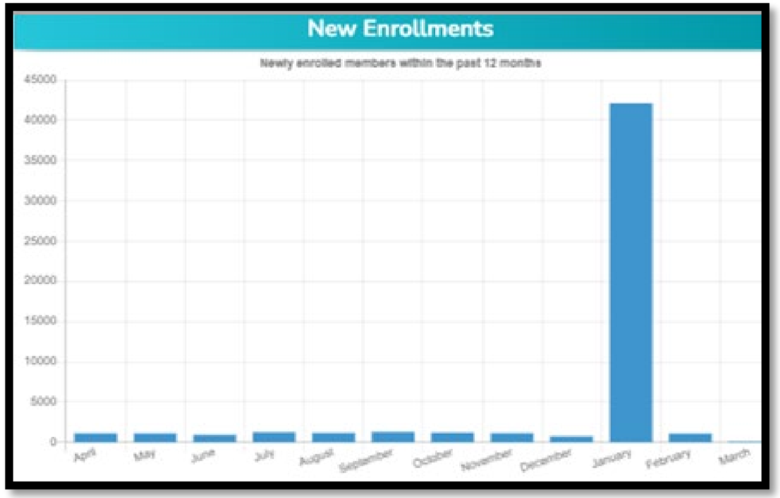
Medicare Book of Business:

- Provides a summary of the total book of business over a 12-month period



New Enrollments:

- Provides a summary of newly enrolled members over a 12-month period



Note: To see more information, select **View Details**.

CENTENE Workbench

Statements

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Statements

If you are either Direct or Downline Only, you will receive statement information in your portal.

If you have an Assignment of Compensation (AOC) please contact your AOC for payment information.

- Statements publish every Wednesday before payment on Friday

Step 1: From the navigation menu, select Statements. Each published statement will display a row of details for that specific payment.

- Statement Date (STMT Date) corresponds with payment date

Statements (cont)

Step 2: To view the entire statement, select the blue **Excel** button. The statement file will download in the bottom left corner of the browser window.

Step 3: Select downloaded file to open the excel spreadsheet. Based on account activity there may be Summary, Detail, Legacy or Misc. tabs to review.

NOTE: If you are receiving or have received payment via paper check, you will have an additional field “CK#”

	Stmt #	Chk #	Stmt Date	Payee	Credits	Debits	Balance	Amount	Pmt Type
EXCEL	3655	215	04/15/2022	[illegible]	$28,784.75	$-9,136.33	$0.00	$19,648.42	Check

Book of Business

Book of Business

The Book of Business tab will display all members that list you as the Broker of Record (BOR).

Step 1: From the navigation menu, select Book of Business.

Step 2: You can search one of two ways.

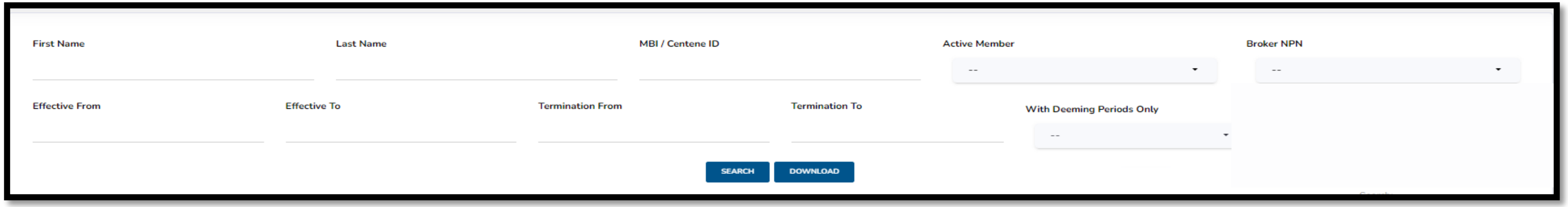
- Select the **Search** button to display all the members in your book of business
- Enter one of the below filters to look for a specific member or members who fall under specific categories
  - Once the search criteria is entered, select **Search** to generate the results

Book of Business (cont)

Step 3: Once you select the search button, a limited set of member information related to the search criteria will display.

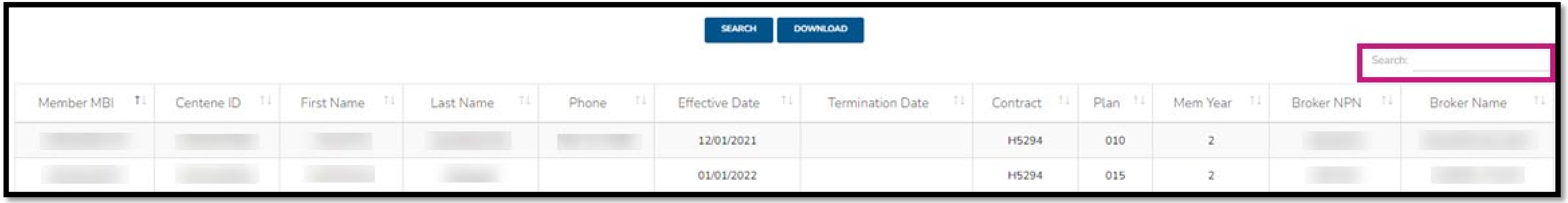
- At any time, select **Download** to export your Book of Business into Excel

Note: The Book of Business download provides additional information about your members.



Book of Business

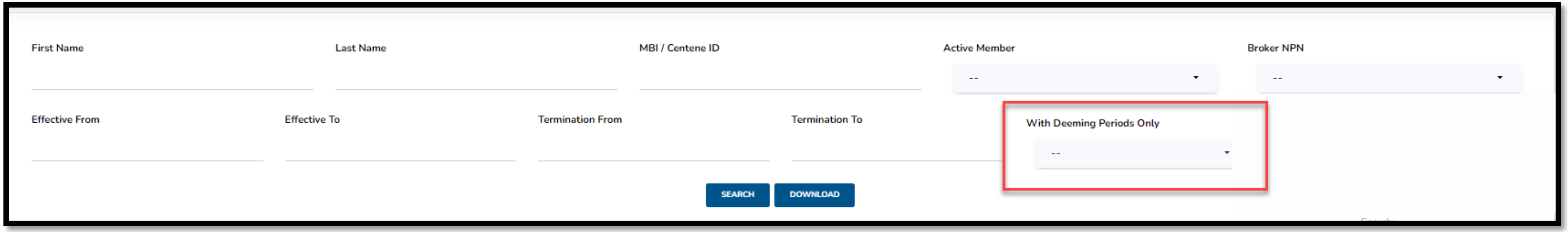
- Once you select the **Search** button, the member information pertaining to the search criteria will display
- From here, navigate through the list of members, or download to a CSV file for additional member information
- Also use the open text **Search** field to search for a member



Member MBI	Centene ID	First Name	Last Name	Phone	Effective Date	Termination Date	Contract	Plan	Mem Year	Broker NPN	Broker Name
[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	12/01/2021		H5294	010	2	[illegible]	[illegible]
[illegible]	[illegible]	[illegible]	[illegible]		01/01/2022		H5294	015	2	[illegible]	[illegible]

Book of Business

- To view a list of members in the BOB that are specifically within the deeming period Select *"Yes"* from the "With Deeming Periods Only" drop down box and click **Search**
- A list will be displayed of all members in your BOB within the deeming period



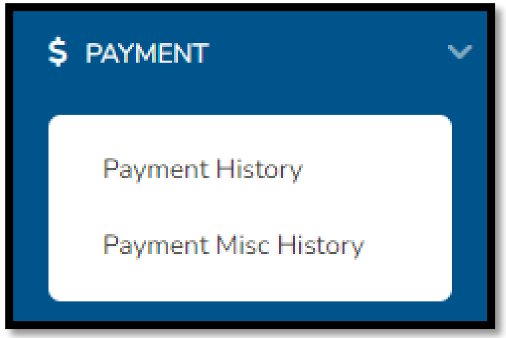
Payment History

Payment

Payment History is a tool to assist with validating commission payments for specific members over a period. The payment section has two links:

Payment History:

1. Allows you to review commission payments for specific members over a period.



Payment Misc. History:

1. Used to review miscellaneous payments associated with legacy members, manual adjustments, Value Based Enrollment Health Risk Assessments (VBE/HRA).

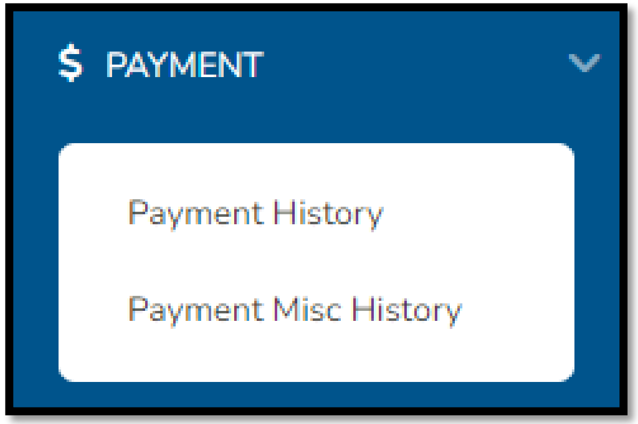
Payment (cont)

From the navigation menu, select Payment and either Payment History or Payment Misc. History

Select desired statement date range

Input member MBI in the MBI field and select **Search**

NOTE: The download button provides additional information about payment for desired member.



CENTENE Workbench

Application Status

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Application Status

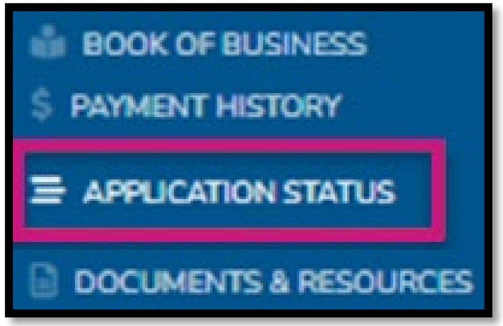
The application section has two links

- **Application Status**
  The status feature can be used to find applications in an RFI status. Use the status filter daily to find RFI’s that need to be worked.

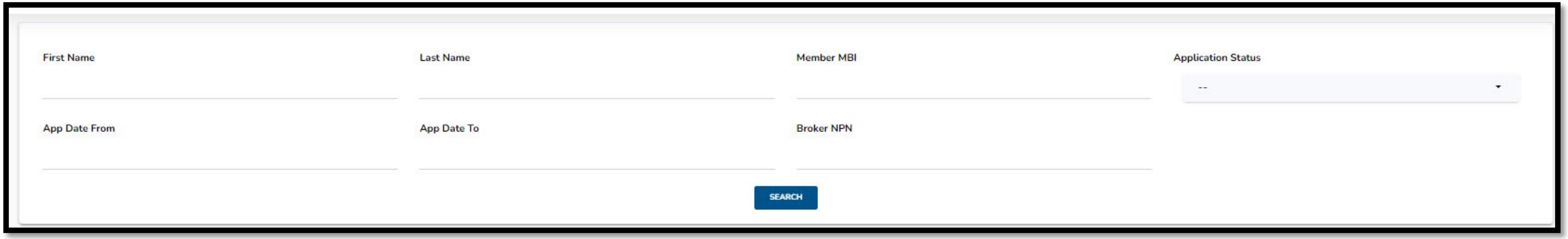
- **Upload Application**
  Paper applications can also be uploaded in this portal. A form must be scanned and converted to a PDF of TIFF file type to use this feature. There must be a CMS Contract number listed on the enrollment form to use this feature.

Application Status

Application Status allows tracking of all submitted applications where you are the BOR.



- Use any of the below search fields to narrow down your generated results
- Select **Search** to show all applications



Application Status (Cont)

- Once **Search** is selected all applications and information will display
- Download the results, a CSV file is available at this time

SEARCH DOWNLOAD

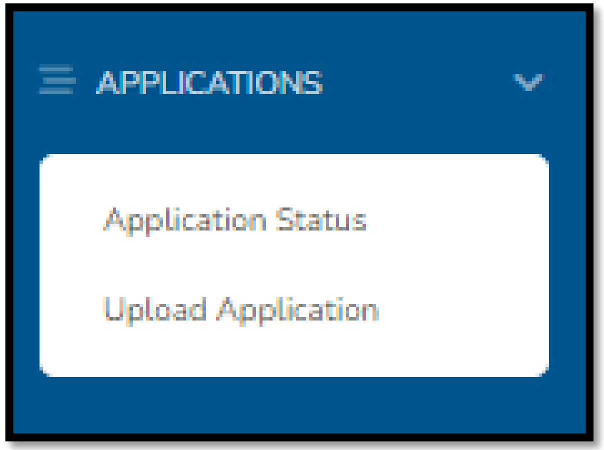
Search:

App ID	Member MBI	App Sign Date	Effective Date	First Name	Last Name	Status	Reason	Broker NPN	Broker Name
[illegible]	[illegible]	02/07/2022	03/01/2022	DOLORES	[illegible]	Enrolled-Active		[illegible]	[illegible]
[illegible]	[illegible]	02/12/2022	03/01/2022	NATHANIEL	[illegible]	Future Enroll		[illegible]	[illegible]

Application Status (cont)/Upload Application

Upload Application

- From the navigation menu click on the applications drop-down then select the Upload Application.
- Select Upload Application button: the upload application document will pop up. Once up, complete the fields. In the CMS Contract field select the contract number of the plan the applicant has selected.
- For PDP applications, select S4802 from the drop-down.
- If a contract code is not listed, this method of submission is not applicable for the application type.
- Select the browse button. In the file explorer window that appears find and select the application then select the open button. Only PDF and TIFF files can be uploaded.



Application Status (cont) /Upload Application (cont)

Upload Application (cont)

- Select Upload Application button. Applications can take up to two hours to upload.
- Submitted applications can have three potential statuses.

Status	Description
Upload Successful	Upload in processing
Application received	Application has been received via E-FAX
Upload Failed	Upload was unsuccessful; the application did not go through

Documents & Resources

Document and Resources

There are two links to this section:

Shared Resources

- The shared resources link provides access to many useful resources, documents and links.

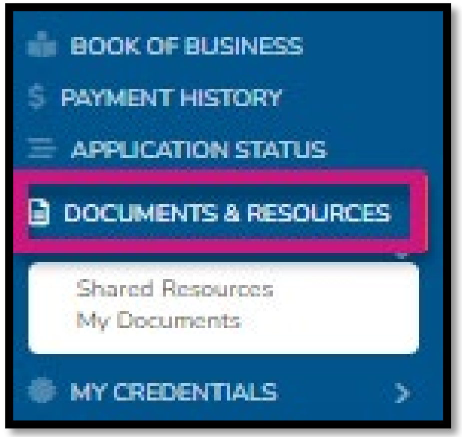
My Documents

- The My Documents tab houses all documents that are specific to you and are only visible within your portal.

Document Resources

Shared Resources

The Shared Resources tab provides all broker related step action and resource documents.
To locate a resource, use the navigation bar and choose Shared Resources under Documents and Resources drop down.



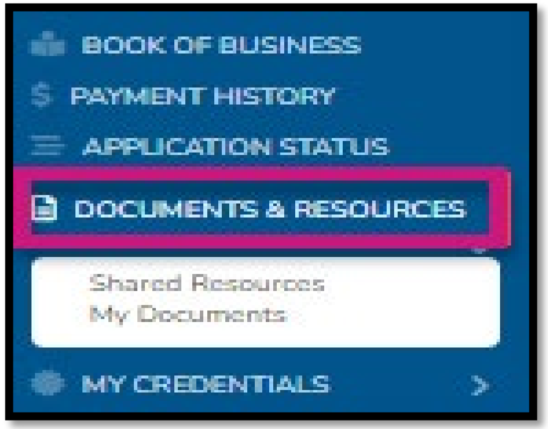
- Navigate through the list of resources
- Use the open text Search field as an alternative
- To locate specific Resource type, use the drop down or type a specific name in the drop-down box.
- If the Resource is a PDF, view the document within the portal or download it.

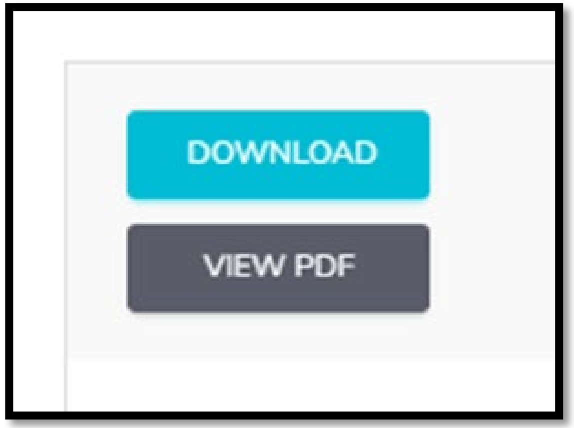
Document Resources

My Documents

- Documents will include a copy of your WellCare Contract, W9s, any Contract Addendums that may be required in the future etc.

- Navigate through the list of Doc Names





My Credentials

My Credentials

My Credentials section has four links:

- My Certification Cases
- Manage My Licenses
- My Status & Credentials
- ASR Report

My Credentials (cont)

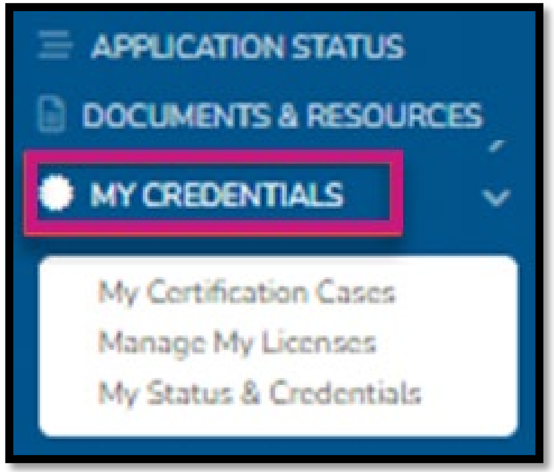
My Certification Cases

The My Certification Cases tab allows you to review and track your onboarding history.

Complete any annual recertification requirements

- **Example:** Contract changes to acknowledge

Note: If onboarding was through the old broker management system, no onboarding cases will be available at this time.



My Credentials (cont)

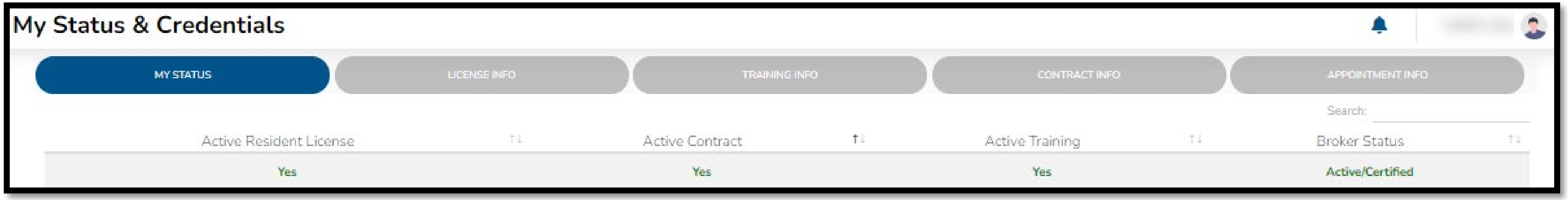
Manage My Licenses

- Active States displays which states you are currently approved to market/sell Wellcare plans
- Available States displays additional states that are available for you to add to your profile
  - After completing selecting a state(s), select the **Add Selected State** button to save your changes
  - Wellcare will then process any necessary appointments based on the state rules

My Credentials (cont)

My Status & Credentials

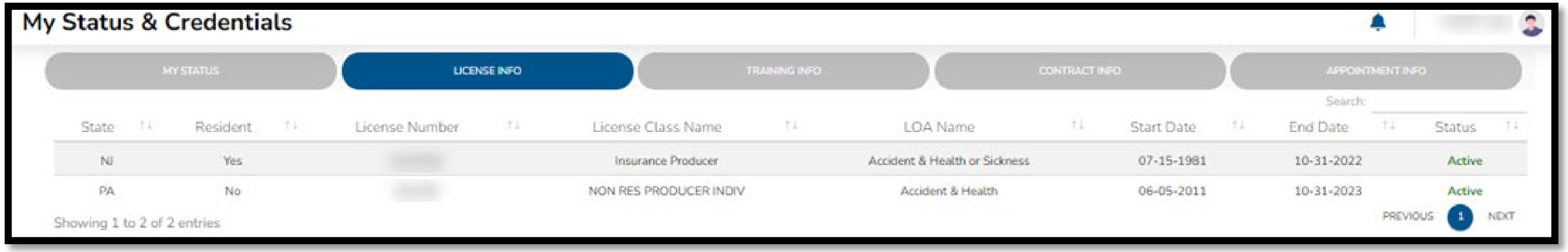
The My Status tab displays information regarding your Resident License, current agreement with Wellcare, training requirements, and overall status.



My Credentials (cont)

My Status & Credentials (cont)

The License Info tab provides more details regarding the state licenses you have elected to market/sell Wellcare products.



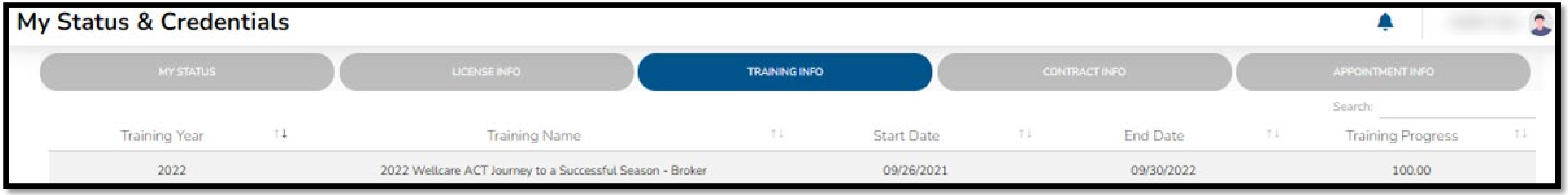
- Displays if the license is Resident or Non-Resident, the state of the license, the license number, the class and LOA name, the effective date and expiration dates, and the overall status of that license

Note: Once you have renewed a license with the State DOI, NIPR will automatically send the updated license information and it will reflect within your portal.

My Credentials (cont)

My Status & Credentials (Cont.)

The Training Info tab displays AHIP and ACT history and status.

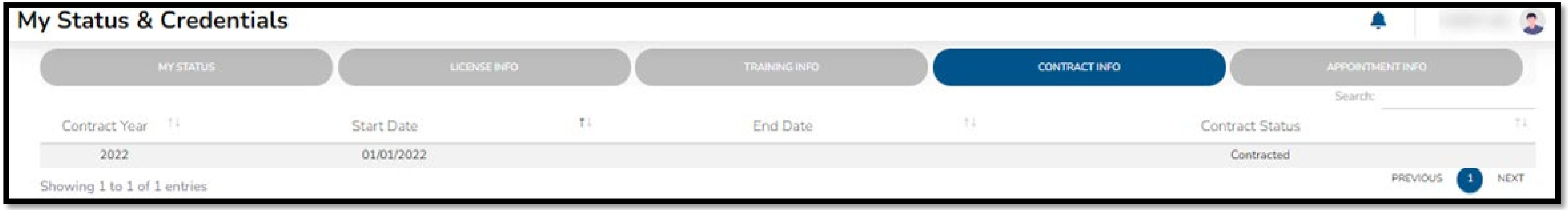


- Every year track progress through the Training Progress column
- Training Progress Percent Breakdown:
  - 25% = AHIP Only Completed
  - 50% = AHIP + ACT Journey Completed
  - 75% = AHIP + ACT Journey & Product Completed
  - 100% = AHIP + ACT Journey & Product + ACT Exam (Passed)

My Credentials (cont)

My Status & Credentials (Cont.)

The Contract Info tab provides details regarding contract status with Wellcare.



- The End Date will remain blank as long as the contract remains valid
- When there is a required contract addendum to acknowledge, a new line with the updated contract year and start date will display
    - The previous contract will be updated with an End Date

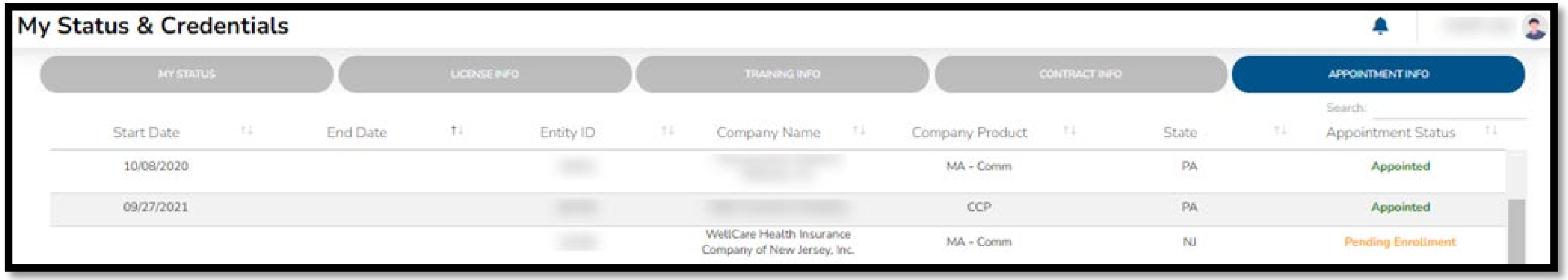
My Credentials (cont)

My Status & Credentials (Cont)

The Appointment Info tab provides details regarding Appointments with Wellcare and each state.

- Track the status of each appointment by using the Appointment Status column
  - Appointed = Appointed with WellCare in that state.
  - Pending Enrollment = This state has a JIT (Just In Time) appointment rule. WellCare will appoint the broker once an application is written in that state.
  - Ready for Appointment = the appointment has been added to the queue for processing.
  - None = the state is a non-appoint state, no appointment required.
  - Terminated = the appointment has been terminated with the state.

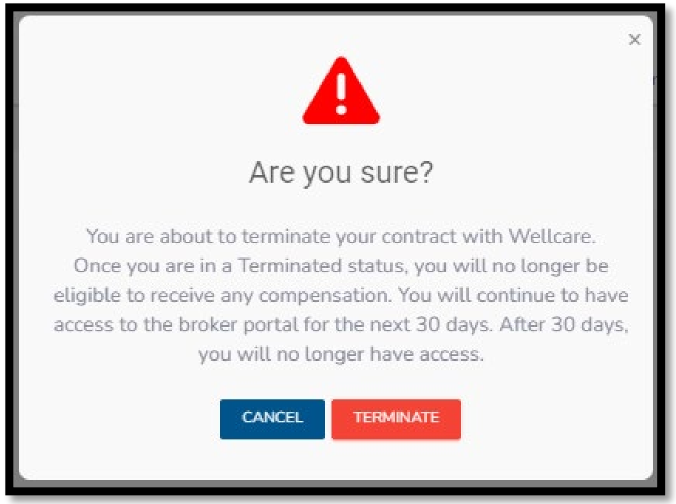
Note: WellCare manages the appointments with each state. There is no action on your part. This tab is just for monitoring and tracking your credentials.



My Credentials (cont)

My Status & Credentials – Terminate Your Contract

- As a level 01 Broker, you can terminate your contract with WellCare at any time
- Please be advised that once you are terminated, you will only have portal access for 30 days. After 30 days your access will be revoked
- To sell WellCare products again, you will need to request a new invitation and complete all onboarding requirements



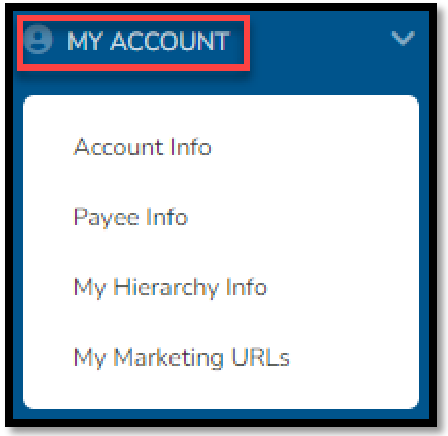
My Account

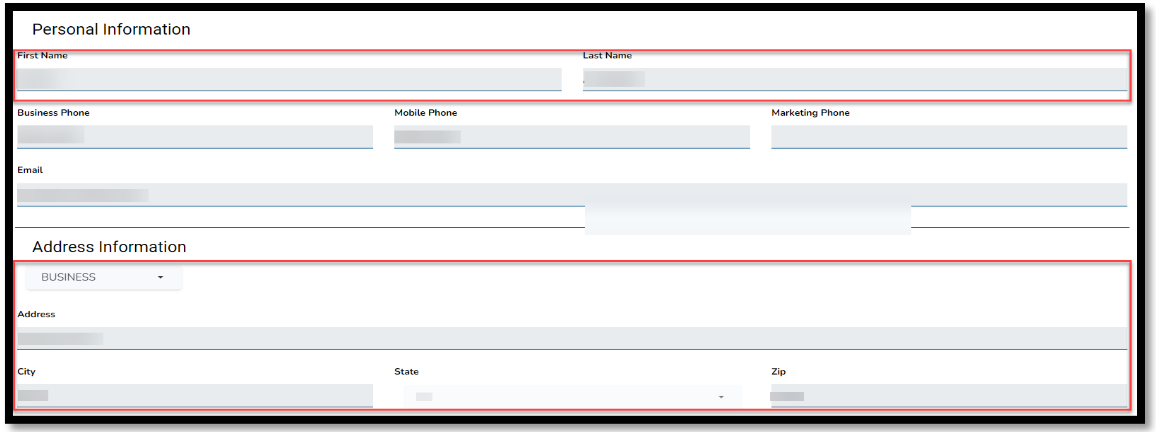
My Account

This section contains four links: Account Info, Payee Info, My hierarchy Info, and My Marketing URLs.

Account Info – Personal Information

Your Account Information captures your name and contact information on file.





The name and business address on file in Centene Workbench must match NIPR and must match your license.

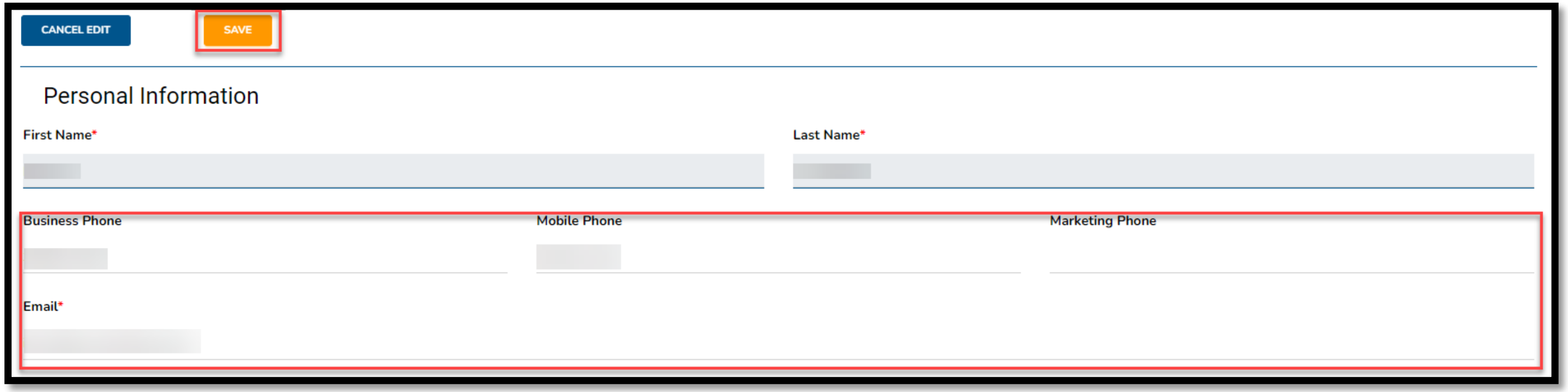
Note: Name and Business Address is pulled directly from NIPR and cannot be changed as it must match your license.

My Account

To update your phone number, add a Marketing phone number, and/or update your email address:

Select the **Edit Account Info** button.

Edit the desired information. Select the **Save** button to complete the update.

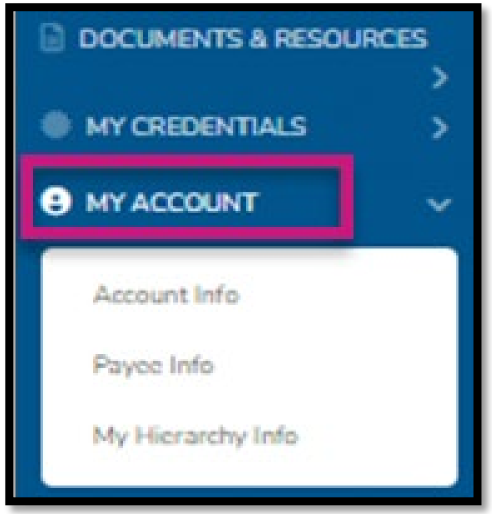


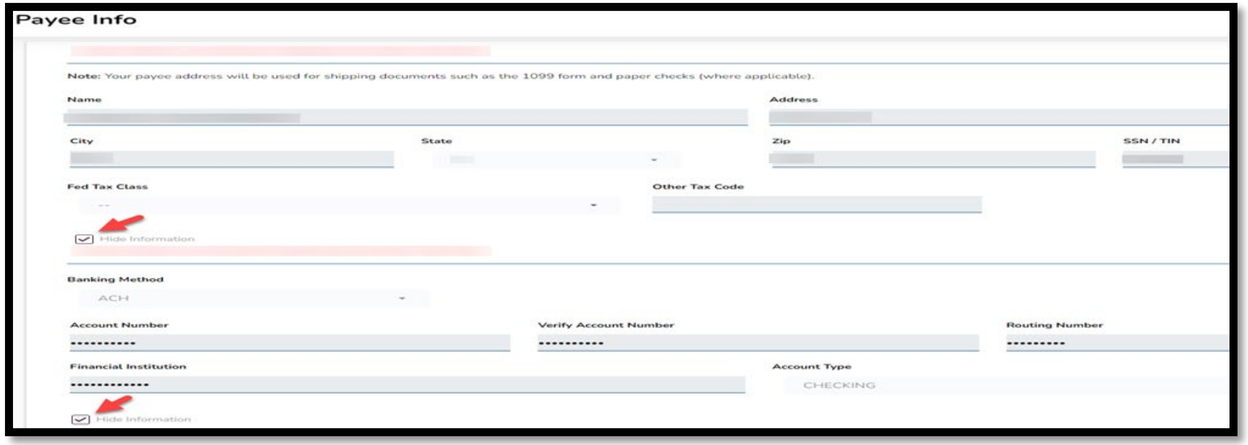
My Account

Payee Info

The Payee Info tab captures the name and address of the entity that is on file for payment.

- Here you will be able to view name, address, federal tax class, and banking information for the payee.
- To view sensitive information, uncheck the **Hide Information** boxes in the **Edit Payee Info** and **Edit Banking Info** sections.

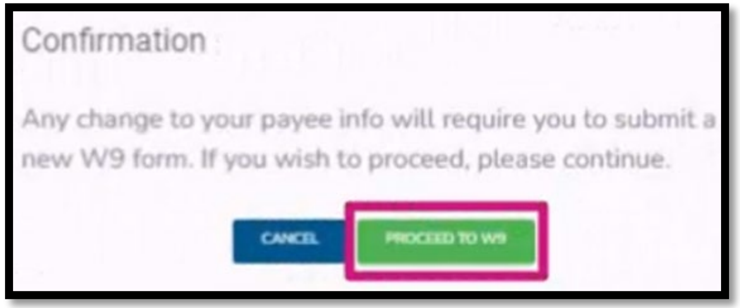




My Account

Payee Info (cont)

You can also make edits to your payee info, declare a private company to be your payee and update banking information. **Note:** Updating Name or Address will cause a prompt to complete a **NEW** W9 form. You must complete this W9 update for your changes to be saved.

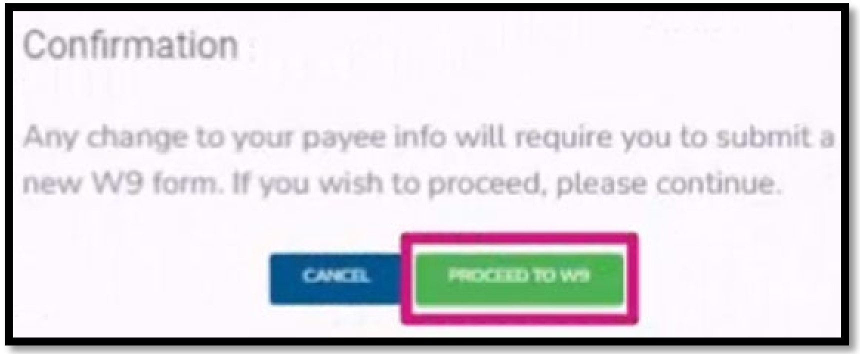


My Account

Edit Payee Info

To edit Payee info when you are ***NOT*** declaring a private company to be your payee:

1. In the Payee Info window, select the Edit Payee Info button. A confirmation window will appear.
2. Select the Proceed to W9 button.
3. In the Payment Information screen's Payee section, in the 'Do you want to declare a private company to be your payee?' drop down, select No.
4. In the banking information section, select ACH in the Banking Method field and complete all the required fields.



My Account

Edit Payee Info (Cont)

5. You can select the Eye icon to view the current Account number information
6. Select the CONTINUE button. This will populate the info on the electronic W9 form for you.
7. Select the W9 attestation box. A checkmark will appear.
8. In the signature field, sign your name using your mouse or finger, depending on your device.
9. Select the SUBMIT button.
10. The workflows view will appear, and your transaction will be listed with its related status.

My Account

Payee Info – Create a Payee Profile

When you declare a private company to be your payee, your 1099 will be in the name of this entity. This is done by creating a Payee profile.

Note: A Tax ID can only be used once as a Payee. Two brokers cannot share a Payee profile.

To declare a private company as your payee:

1. Follow steps 1 & 2 of the Edit Payee Info instructions.
2. In the Payment Information screen's Payee section, in the 'Do you want to declare a private company to be your payee?' drop down, select **Yes**.
3. In the W9 information section, select the proper Taxation Type drop-down
4. In the Business Entity Information section, update the fields to reflect your company's information.
5. Select the check box to confirm that you are legally authorized to execute contracts and agreements on behalf of the company.

My Account

Payee Info – Create a Payee Profile (Cont)

6. In the Banking Information section, select ACH in the Banking Method field and complete all the required account fields.
- The Taxpayer ID number field should have the TIN of the business or private company.
- The Business Name should have the name of the business or private company.
- The Address, City, State, and Zip fields should have the shipping address for the business or private company.

7. Select the Continue button. A copy of the updated W9 will appear.
8. Download a copy of the updated W9 by selecting the Download button.
9. Acknowledge that the W9 is correct by checking the check box and entering your signature in the signature field provided.
10. Select the Submit button. The workflow is complete, and your payee info will be updated.

Note: Dual Assignment and LOA Brokers are paid based on the assignment of commissions on file.

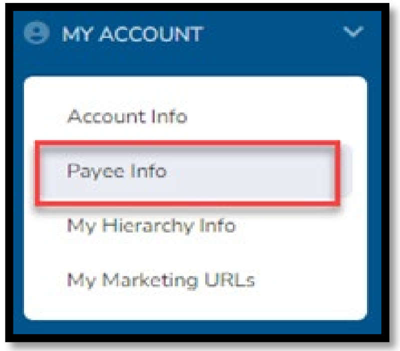
My Account

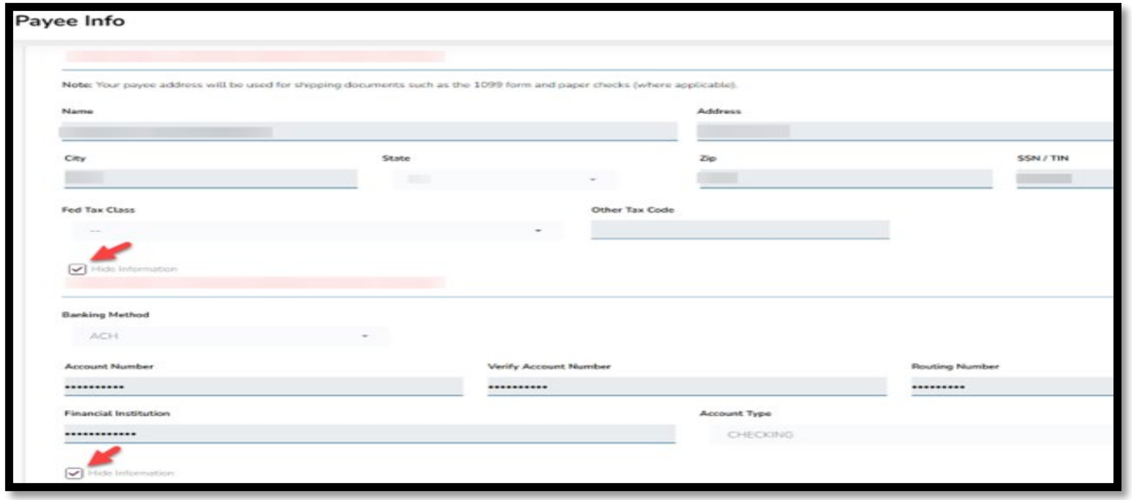
Edit Banking Info

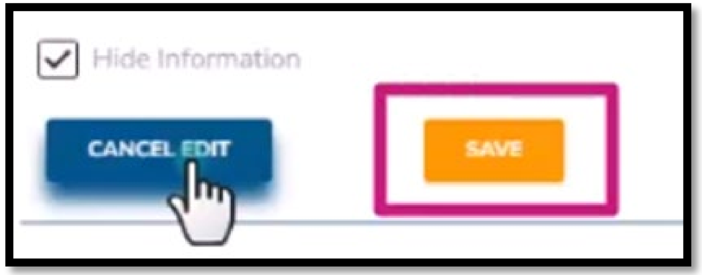
If you are receiving your own commissions, edit your banking information to ensure ACH deposits go into the right account.

To edit banking information:

1. From the My Account drop-down, select **The Payee Info** link.
2. Select the **edit Banking Info** button. The fields will become editable. Uncheck the **Hide Information** box- the Account/Routing Numbers will become visible.
3. Update the banking information fields that need to change. Select the **Save** button.



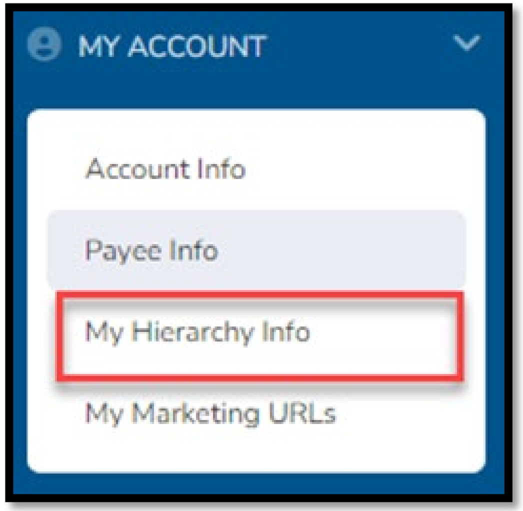




My Account

My Hierarchy Info

The My Hierarchy Info tab provides a view of your current level, upline information (if applicable), compensation assignment, Sub Type, and Broker Type.
This tab will also provide upline history and displays the time spans when you reported to a different upline or were a different sub type.



Sub-Types

Sub-types represent the various models and/or contracting types. These describe how a broker is contracted with Centene or their upline.

Sub-Types (Cont)

Brokers can have the following sub-types:

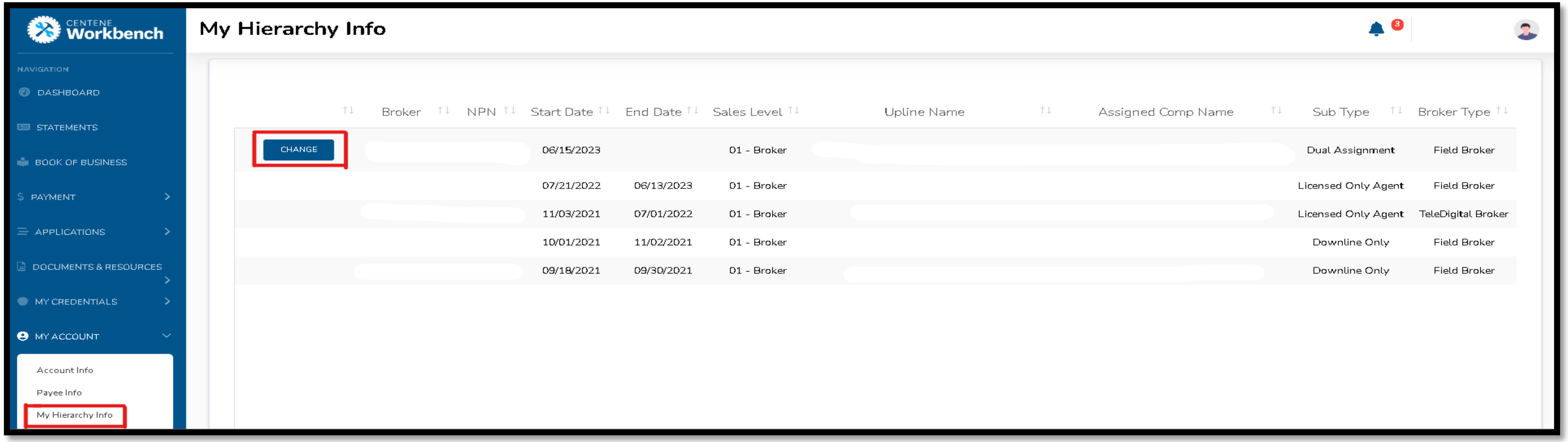
Sub-type	Description
Direct	Direct to Wellcare – Commissions not assigned. Paid to broker directly. Broker/Agency owns their book of business.
Downline Only	Broker/Agency has an upline. Commissions not assigned. Paid to broker directly. Broker/Agency owns their book of business.
Dual Assignment	Broker/Agency has an upline. Commissions assigned to upline. Broker/Agency owns their book of business.
LOA (Licensed Only Agent)	Broker/Agency has an upline. Commissions assigned to upline. Broker/Agency does not own book of business. Book stays with upline.

Note: If you are an LOA Field Broker and want to make a change, you must first request to be released from the LOA sub-type. Contact Sales Support or your upline for help processing the release. Releases must come from the upline via the Centene Workbench portal.

My Account

Upline, Sub-Type and Compensation Assignment Changes

- To make a change to your direct upline or compensation assignment:
  - From the Hierarchy Info page, select the **CHANGE** button. A new window will display a summary of the current data.

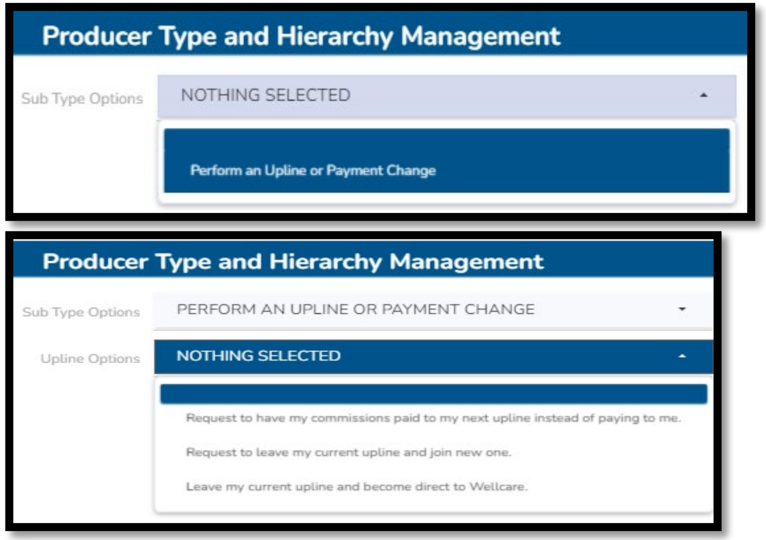


Note: The **CHANGE** button will be grayed out during the Annual Hierarchy Change Suspension Period.

My Account

Upline, Sub-Type and Compensation Assignment Changes (Cont)

1. From the Sub Type Option drop-down, select the **Perform an Upline or Payment Change** option.
2. From the Upline Options drop-down, select the appropriate option.



Note: The proposed upline must be contracted at a GA level or higher.

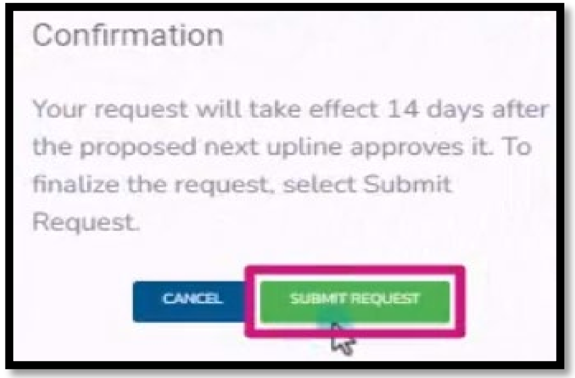
3. Options will be dependent on your current sub-type. **Examples include:**

- Request to have my commissions paid to my next upline instead of paying to me. (Dual Assignment)
- Request to have my commissions paid to me instead of to me next upline. (Downline Only)
- Request to leave my current upline and join a new one. (Dual Assignment or Downline Only)
- Leave my current upline and become direct to WellCare. (Direct)

My Account

Upline, Sub-Type and Compensation Assignment Changes (Cont)

4. Choose the appropriate option. Depending on the option selected, additional prompts may appear with additional questions.
5. If joining a new upline, you will be prompted to indicate who will be receiving the commissions. Select the appropriate option. Then, when the Next Upline field appears, select the **SEARCH** button.
6. In the New next Upline Search window, type either the **Upline Name** or **Upline NPN** in the fields provided and then select the **SEARCH** button. A list of potential uplines will appear. Choose the **SELECT** button for the desired upline.
7. Once all required fields have been completed, select the **UPDATE** button.
8. A confirmation prompt will appear. Select the **SUBMIT REQUEST** button.



My Account

Upline, Sub-Type and Compensation Assignment Changes (Cont)

Note: If you previously did not receive your own funds and are moving to a sub-type where you do receive your own funds, you will select the **SUBMIT REQUEST & PROCEED TO BANNKING WF** button, and then you will also be required to complete a W9 and provide banking information.

- Once the request is submitted, your current hierarchy line updates to Request Pending status, and you will not be able to submit additional changes.
- To view more details about the submitted request, select the Request Pending link to be directed to the Workflows window.
- You can cancel a request from the Workflows window, if needed. The proposed upline will receive a request within their own portal to either accept or deny your request to join their hierarchy.

	Broker	NPN	Start Date	End Date	Sales Level	Upline Name	Assigned Comp Name	Sub Type	Broker Type
Request Pending			10/01/2021		01 - Broker			Dual Assignment	Field Broker

My Account

Upline, Sub-Type and Compensation Assignment Changes (Cont)

- If you request to go direct to WellCare, the request will take effect after a waiting period of **14 days**.
- If you request to join a new upline (and are currently direct to WellCare), the request will take effect **once the proposed next upline approves it.**
- If you request to leave your current upline and join a new one, the request will take effect **14 days** after the proposed next upline approves it.
- If you request a change to your payment type, the request will take effect **once the proposed next upline approves it.**
- If you previously did not receive your own funds and are moving to a sub-type where you do receive your own funds, the request will take effect **once the proposed next upline approves it.**
- If an upline denies the request, your current hierarchy information will remain active. You will be able to submit a new request.

My Account

My Marketing URLs

We also have a special place to upload all the marketing URLs you use as a broker to market Centene products.

- Under the My Account section, select the **My Marketing URLs** link.
- Any marketing URLs that you are using as a broker to market Centene products that contain branding or content associated with Centene should be uploaded here.

Note: Marketing URLs need to be approved. Contact your local field leader for more details.

- The URL is accessed via Ascend and does not appear under this link.

CENTENE
Workbench

Support Tickets

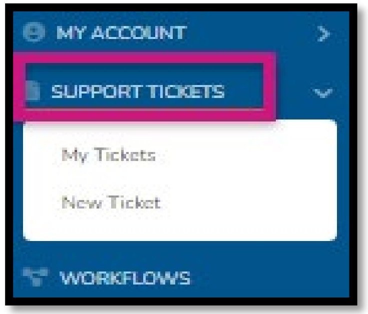
wellcare

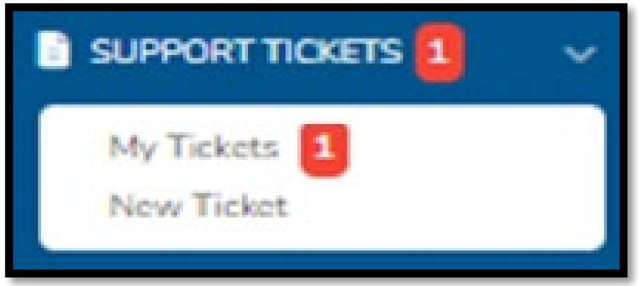
Support Tickets

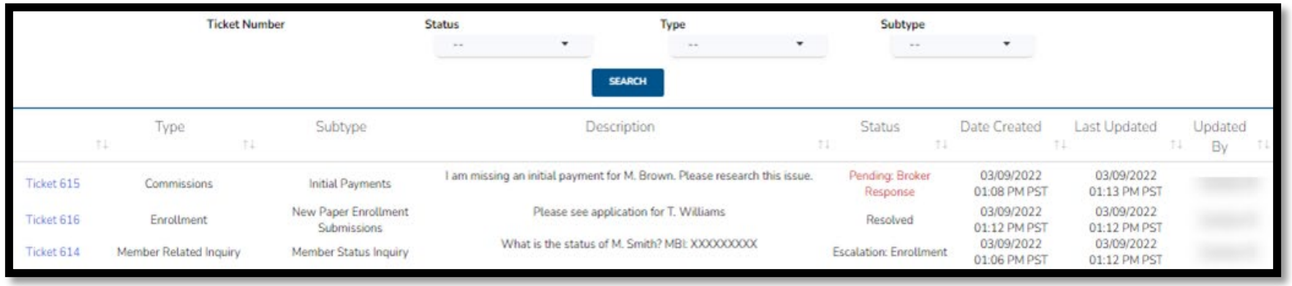
My Tickets

The My Tickets tab allows the tracking of the status and responses on all inquiries submitted.

- If there is an action item, there will be a red number next to My Tickets
- Use the following criteria to filter down the results: Ticket Number, ticket status, ticket type, and ticket subtype
- Tickets will automatically be filtered to show any **Pending Broker Response** tickets at the top







	Type	Subtype	Description	Status	Date Created	Last Updated	Updated By
Ticket 615	Commissions	Initial Payments	I am missing an initial payment for M. Brown. Please research this issue.	Pending: Broker Response	03/09/2022 01:08 PM PST	03/09/2022 01:13 PM PST	
Ticket 616	Enrollment	New Paper Enrollment Submissions	Please see application for T. Williams	Resolved	03/09/2022 01:12 PM PST	03/09/2022 01:12 PM PST	
Ticket 614	Member Related Inquiry	Member Status Inquiry	What is the status of M. Smith? MBI: XXXXXXXXX	Escalation: Enrollment	03/09/2022 01:06 PM PST	03/09/2022 01:12 PM PST	

Support Tickets

My Tickets – Ticket Statuses

The My Tickets tab allows to track the status and responses on all inquiries submitted.

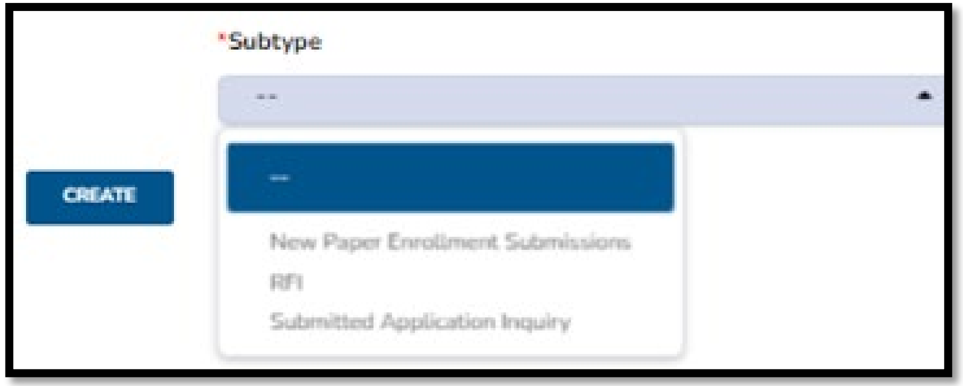
Status	Status Meaning
Resolved	Your inquiry has been worked and is resolved. The ticket is closed.
Pending Resolver	Your inquiry has been submitted and is in the queue to be assigned to a Sales Support rep.
Pending Broker Response	Sales Support requires additional information from you to resolve your inquiry.
Escalation: Enrollment	Your inquiry has been sent to Accounts Payable. Once they provide a response back to Sales Support, we will resolve your inquiry.
Escalation: Accounts Payable	Your inquiry has been sent to Accounts Payable. Once they provide a response back to Sales Support, we will resolve your inquiry.
Escalation: IT Solutions Team	Your inquiry has been sent to IT. Once they provide a response back to Sales Support, we will resolve your inquiry.

Support Tickets

New Ticket

To create a New Ticket, select the ticket type for your inquiry.

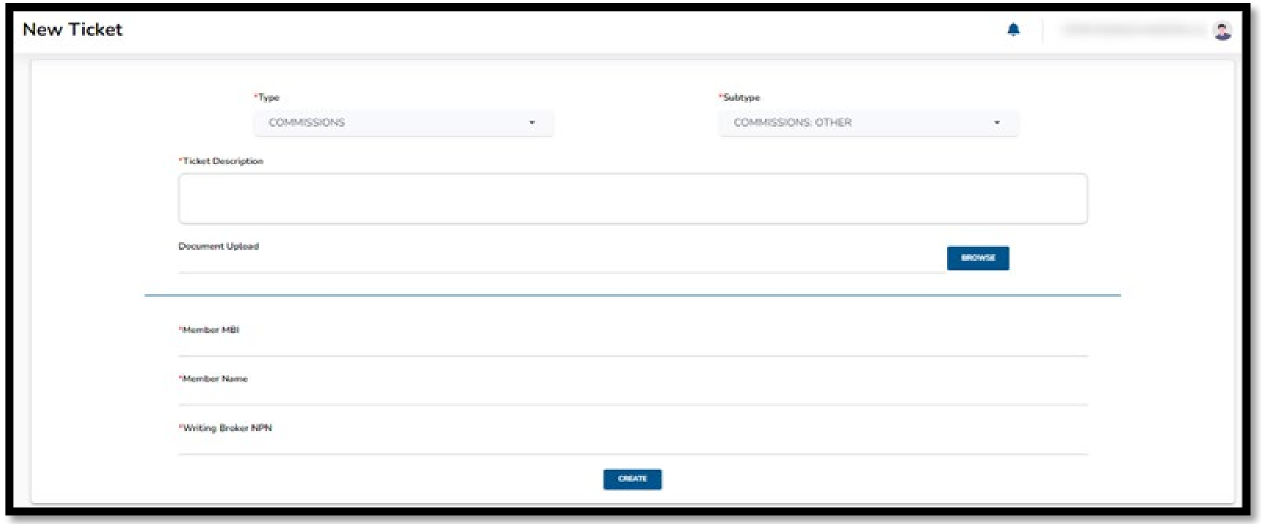
- Once the ticket type is selected, the ticket subtype can then be selected
  - This is a more specific description of your inquiry



Support Tickets

New Ticket (Cont)

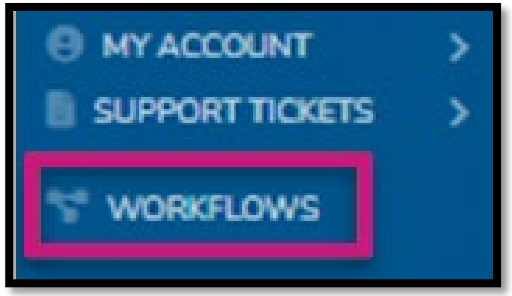
- Every ticket type requires a description
  - This is an open field to enter in detail about the inquiry
- Depending on the subtype, specific data points will be required to submit the ticket
- For every inquiry, please provide as much information as possible so that Sales Support can best assist you!
- Once all requirements are completed, select **Create** to submit your inquiry



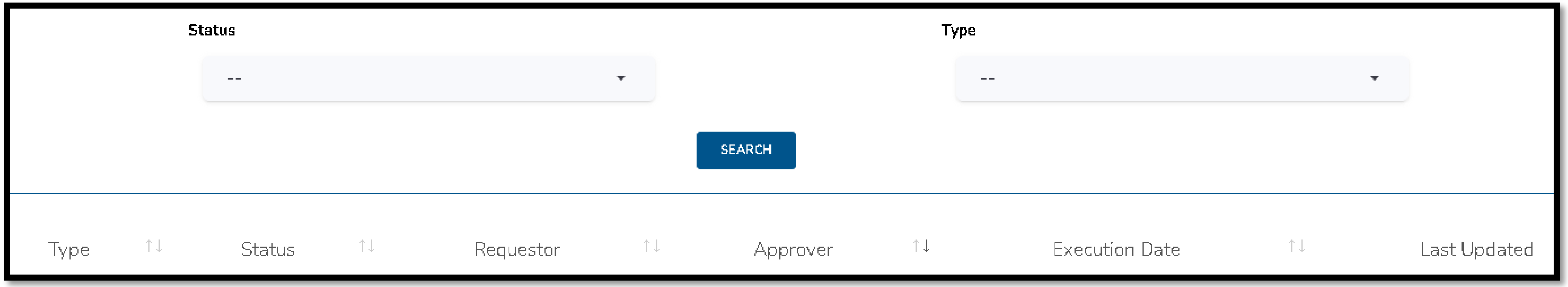
Workflows

Workflows

The Workflows tab tracks all cases that have been created by or assigned to you.



- Workflows include: Completing a New W9, Requesting a Hierarchy Change, becoming a Principal of an Agency, etc.
- Filter Workflows by Status and Type
- Track when the Workflow was last updated and who is the Assigned Approver
- Cancel Hierarchy Change Requests



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Questions?

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