AGENT CONNECT USER GUIDE

September 2020
AGENT CONNECT USER GUIDE

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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

Password Requirements:

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

If your password meets requirements and each entry matches, you will see the check mark next to CHOOSE A PASSWORD as shown on the left.
Single Sign-On Portal (SSO)

SETTING PERMANENT LOGIN CREDENTIALS

Step 2: Enter your alternate contact details

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

If your alternate phone and emails meet requirements, you will see the check mark next to ENTER YOUR ALTERNATE CONTACT DETAILS as shown on the left image.
# Single Sign-On Portal (SSO)

**SETTING PERMANENT LOGIN CREDENTIALS**

**Step 3:** Choose and answer 6 security questions

<table>
<thead>
<tr>
<th>Question</th>
<th>Answer</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. What is your mother's maiden name?</td>
<td>Smith</td>
</tr>
<tr>
<td>2. What is your favorite pet's name?</td>
<td>Rover</td>
</tr>
<tr>
<td>3. What is your father's middle name?</td>
<td>Peter</td>
</tr>
<tr>
<td>4. What city were you born in?</td>
<td>Tampa</td>
</tr>
<tr>
<td>5. What is your maternal grandmother's first name?</td>
<td>Claire</td>
</tr>
<tr>
<td>6. What is the name of the first street you lived on?</td>
<td>Maple</td>
</tr>
</tbody>
</table>

*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?
Step 3: Select **Reset Password**

Step 4: Enter your 6-digit WellCare Agent ID in the **User Name** field
Single Sign-On Portal (SSO)

REGISTERING YOUR SINGLE SIGN-ON PORTAL

Step 5: Choose one of the three available options to receive the password reset code then select Continue.
Single Sign-On Portal (SSO)

REGISTERING YOUR SINGLE SIGN-ON PORTAL

Step 6: Enter the Password Reset Code provided, then select Continue

Your Password Reset Code is 582072

Dear Agent Name

A request has been made to reset your WellCare Network IdentityNow password. If you made this request, please copy the following code into the prompt in WellCare Network IdentityNow to verify your identity:

582072

This code expires as soon as it’s used, or on Wednesday 28 August 2019 (16:10:20 UTC).

If you did not make this request, please contact your IT administrator immediately.

Thanks,
The WellCare Network IdentityNow Team
Single Sign-On Portal (SSO)

REGISTERING YOUR SINGLE SIGN-ON PORTAL

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

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**.
Step 9: To continue the setup of your account and access your Single Sign-On portal, type in your **Username** (6-digit agent ID) and the **password** you just created.

Please refer to slides 6 through 9 for setting up your permanent login credentials and logging in!
Single Sign-On Portal (SSO)

FORGOT LOGIN CREDENTIALS / PROBLEMS SIGNING IN

If your User Name or Password is not accepted, select Problems Signing In? located above the Sign In button.

There are three options to assist with logging in:
1. Forgot User Name
2. Reset Password
3. Unlock Account
Single Sign-On Portal (SSO)

REGISTERING YOUR SINGLE SIGN-ON PORTAL

Option 1

Forgot User Name will prompt you to enter your email address. Enter your email address and click Send Email button.
Single Sign-On Portal (SSO)

REGISTERING YOUR SINGLE SIGN-ON PORTAL

Option 2

Reset Password option will prompt you to enter your User Name, then choose a method to verify your identity before resetting your password.
Single Sign-On Portal (SSO)

REGISTERING YOUR SINGLE SIGN-ON PORTAL

Option 3

Unlock Your Account option will prompt you to enter your User Name, then choose a method to verify your identity before resetting your password.

To unlock your account, let's start with your user name.

User Name

319044

Continue

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

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**

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

The **Application Status** indicates the application’s current stage/status.

**Examples:** Approved, Pending Review, Terminated, RFI etc.
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.
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.
AGENT CONNECT USER GUIDE

COMMISSIONS
COMMISSIONS

LOCATING & DOWNLOADING COMMISSION STATEMENTS

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

**Step 1:** On left menu, click Agent History, then click the Statements sub-tab under the Agent History menu located on the left side of screen.

Click on the Statement hyperlink once you have verified which statement date you would like to view.

**Step 2:** A pop-up screen will appear upon clicking the Statement hyperlink. Click Open or Save to view and download the Statement for your records.
COMMISSIONS

DOWNLOADING STATEMENT EXTRACT

The Statement Extract function allows you to convert a PDF statement into an Excel document!

**Step 1:** On left menu, click **Agent History**, then click the **Statements** sub-tab under the Agent History menu located on the left side of screen.

Click on the **row** of the Statement you would like to extract.
COMMISSIONS

DOWNLOADING STATEMENT EXTRACT

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

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

DOWNLOADING STATEMENT EXTRACT

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

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

VIEWING PAYMENT HISTORY

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

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

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

VIEWING PAYMENT HISTORY

**Step 3:** The information will populate.

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

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

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

VIEWING YOUR BOOK OF BUSINESS

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

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

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

DOWNLOADING BOOK OF BUSINESS

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

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

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

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

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

DOWNLOADING BOOK OF BUSINESS (continued)

**Step 3:** Click **Save**. Select **XLS** (Microsoft Excel) option to export the data into an Excel spreadsheet document.
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.
Section 1 Allows you to make changes to your name, email address, phone number, and personal addresses.

\textbf{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.

PO BOX addresses will not be accepted.
**HIERARCHY CHANGE / ASSIGNMENT**

**Quick Glance** - This slide shows a screen shot of the actual page. The following slides will zoom in further and provide step by step instructions to make these changes.
HIERARCHY & COMMISSION ASSIGNMENT CHANGES

HIERARCHY CHANGE PROCESS

Step 1: Check the box next to Request Transfer

Step 2: Enter the PID, Name or Company name for the proposed hierarchy. Click Search

Step 3: Select the proposed hierarchy and click Confirm Request

Step 4: Select Next to continue
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.**

---

Dear [Name];

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

New Hierarchy: [New Hierarchy]

Prior Hierarchy: [Prior Hierarchy]

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
Once the hierarchy change request has been **APPROVED**, all parties involved will receive an email notification confirming hierarchy update processing.

Dear [Name],

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

**New Hierarchy:** [New Hierarchy]

**Prior Hierarchy:** WELL CARE FMO

Please login to [Agent Connect](#) to contact Sales Support or contact your local [District Sales Manager](#) if you have any questions.

Regards,

WellCare Sales Support
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

Step 4: Select Next to continue
HIERARCHY & COMMISSION ASSIGNMENT CHANGES

COMMISSION ASSIGNMENT – COMPLETE

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

---

Dear [Name],

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

New/Current Commissions Assignment: [Assignment]

Prior Commissions Assignment: [Assignment]

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
CONFIRM LICENSES

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

Step 1: Check the license information box
Step 2: Provide a reason
Step 3: Click Next

NOTE: Use the Search field to filter on individual licenses.
AGENT CONNECT USER GUIDE

REVIEW & SUBMIT CHANGES
AGENT PROFILE CHANGES

REVIEW AND SUBMIT CHANGES

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

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

Step 1: Click Submit and Yes to confirm
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.
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