



CENTENE
Workbench

The Wellcare logo, consisting of the word "wellcare" in white lowercase letters inside a teal circle. A small "TM" trademark symbol is located at the bottom right of the circle.

wellcareTM

Completing an Invitation for a Broker to Onboard

Broker and Agency Guide

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

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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>



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**

CENTENE Corporation
CenteneONE-Test

Username

Password

Sign On

Forgot Password

If you need assistance, please contact the Agent Support line at 866-822-1339.

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)

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Change Password

Your password must be changed. Please create a new one.

Current Password

New Password

Verify New Password

Sign On

If you need assistance, please contact the Agent Support line at 866-822-1339.

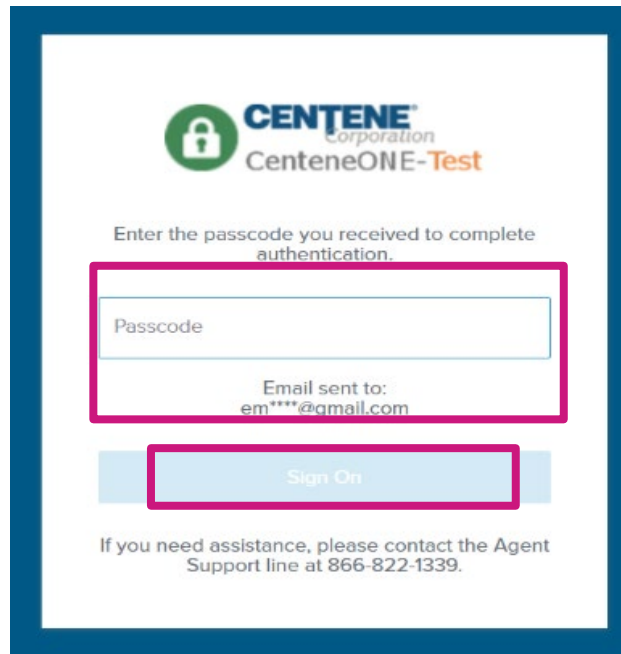
Minimum Password Requirements:

- ✓ Differs from current password
- ✓ No more than 2 repeated characters
- ✓ 5 unique characters
- 8 characters
- 1 special character
- ✓ 1 number
- ✓ 1 UPPERCASE character
- ✓ 1 lowercase character



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**



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Enter the passcode you received to complete authentication.

Passcode

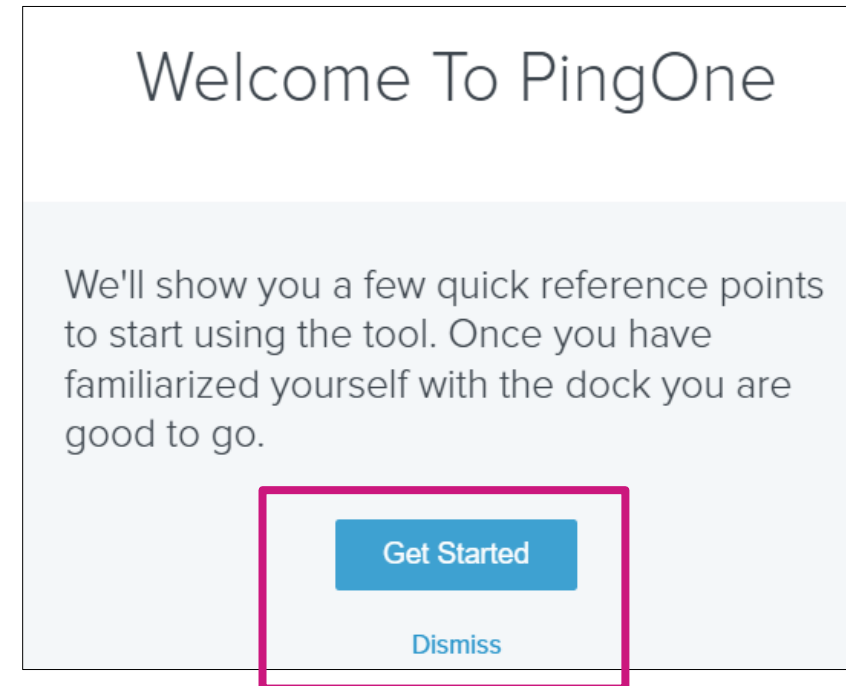
Email sent to:
em****@gmail.com

Sign On

If you need assistance, please contact the Agent Support line at 866-822-1339.

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.



Welcome To PingOne

We'll show you a few quick reference points to start using the tool. Once you have familiarized yourself with the dock you are good to go.

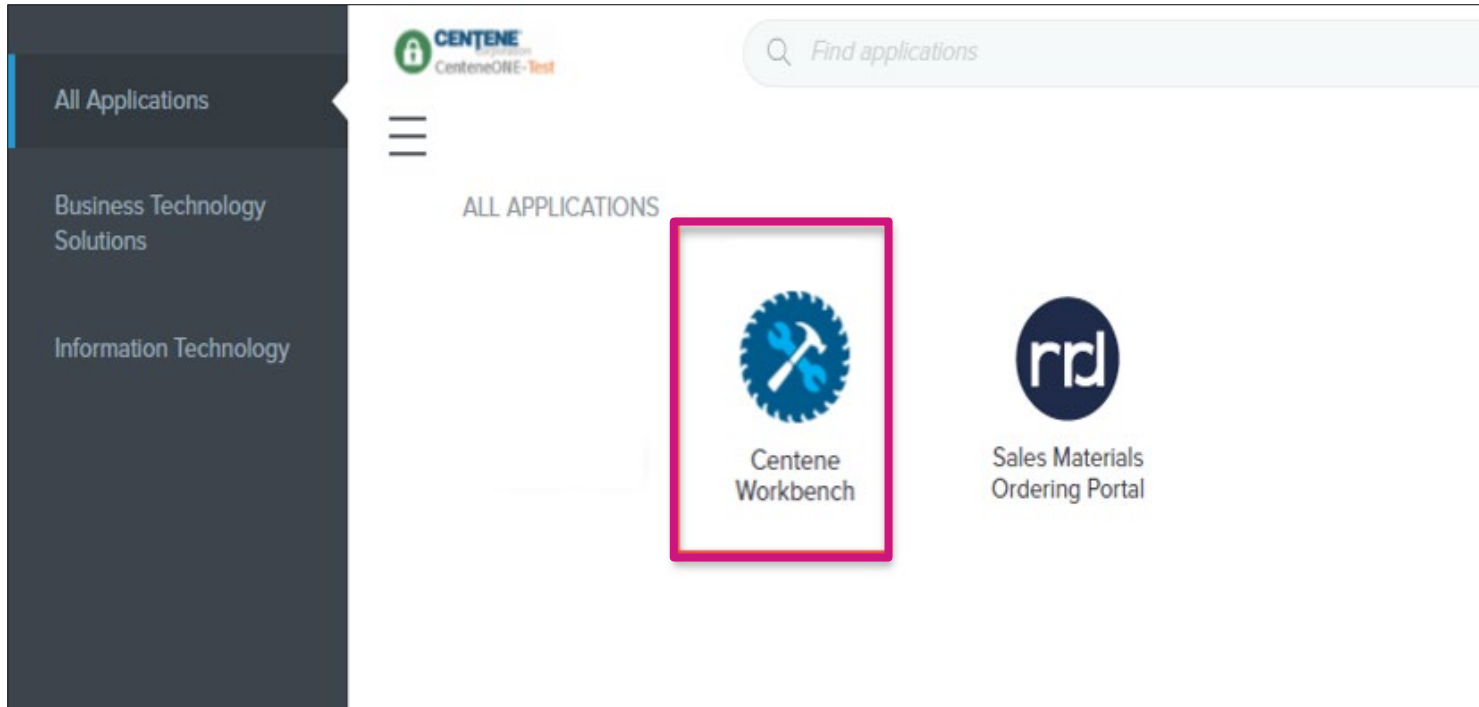
Get Started

Dismiss



Receiving Email Invitation and Logging into PingOne

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

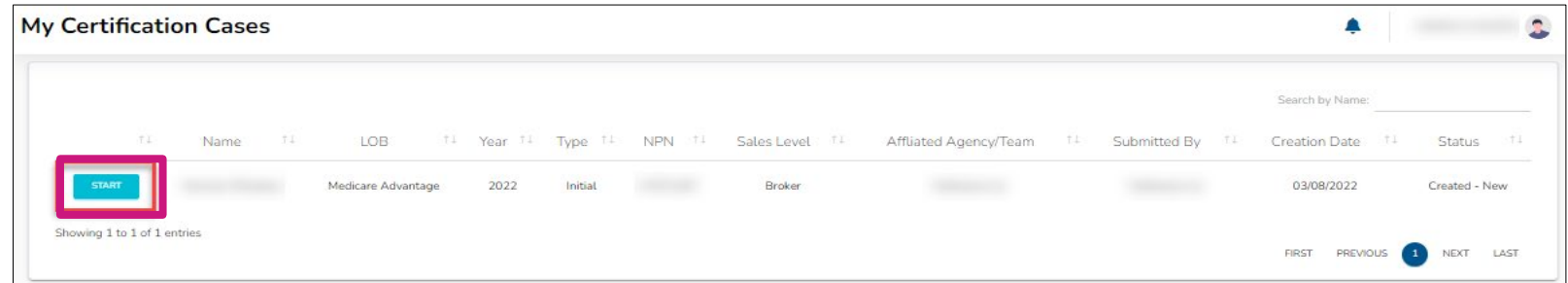


Completing A Contract



Completing A Contract

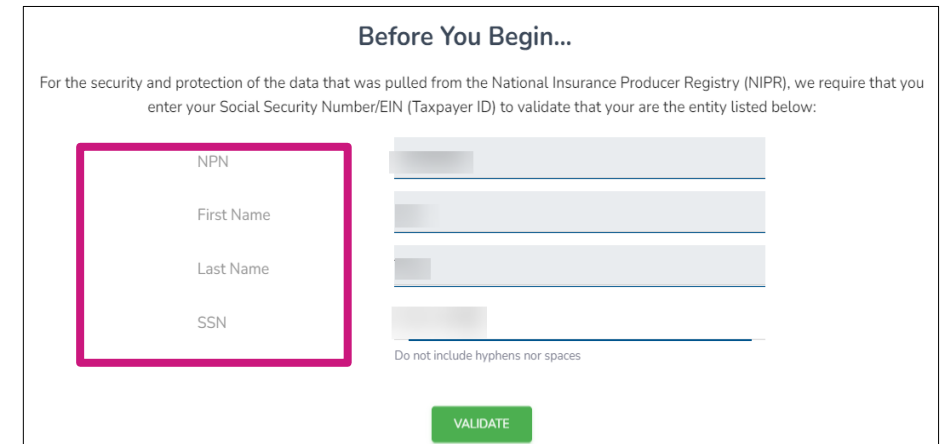
1. Once logged into **Centene Workbench**, you will see the pending contract to complete
2. Select **Start**



The screenshot shows a dashboard titled "My Certification Cases". At the top right, there is a search bar labeled "Search by Name:" and a user profile icon. Below the search bar is a table with the following columns: Name, LOB, Year, Type, NPN, Sales Level, Affiliated Agency/Team, Submitted By, Creation Date, and Status. A single row of data is visible, with a blue "START" button highlighted in a red box. The row data includes: Name (redacted), LOB: Medicare Advantage, Year: 2022, Type: Initial, NPN: (redacted), Sales Level: Broker, Affiliated Agency/Team: (redacted), Submitted By: (redacted), Creation Date: 03/08/2022, and Status: Created - New. Below the table, it says "Showing 1 to 1 of 1 entries." At the bottom right, there are navigation buttons: FIRST, PREVIOUS, 1 (selected), NEXT, and LAST.

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.



The screenshot shows a form titled "Before You Begin...". The text above the form reads: "For the security and protection of the data that was pulled from the National Insurance Producer Registry (NIPR), we require that you enter your Social Security Number/EIN (Taxpayer ID) to validate that you are the entity listed below:". The form has four input fields: NPN, First Name, Last Name, and SSN. The NPN field is highlighted with a red box. To the right of the input fields are four corresponding text boxes containing redacted information. Below the input fields, there is a note: "Do not include hyphens nor spaces". At the bottom right, there is a green "VALIDATE" button.



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.

The screenshot shows the 'My Certification Cases' interface with the 'DEMOGRAPHICS' tab selected. A red message states 'Fields marked with an asterisk (*) are required.' The 'Personal Information' section includes the following fields: First Name*, Middle Initial, Last Name*, SSN*, NPN*, DOB*, Mobile Phone*, Business Phone*, Marketing Phone, Email*, Secondary Email, and Job Title. Each field has a corresponding input box.

The screenshot shows the 'My Certification Cases' interface with the 'DEMOGRAPHICS' tab selected. The 'Shipping Address Information' section includes the following fields: 'Shipping Address Same as Residence?'* with a dropdown menu set to 'No', Address 1*, Address 2, City*, State* (a dropdown menu), and Zip Code*. Below this is the 'Broker Information' section, which includes a 'Broker Type' dropdown menu set to 'Field Broker'.



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**

Upline Information	
LOB	Medicare Advantage
Sub Type	Direct
Sales Level	01 - Broker
Next Upline	

You are onboarding as a 1099, Direct to Wellcare. This means that you do not have an upline and you will receive your own commissions. Your commissions cannot be assigned to another contracted entity and you will have to complete banking information for payment. After you are Active:Certified, you will have the ability to request to join a hierarchy and assign commissions to this entity. If this is not the model you wish to onboard as, please click the Abort option below and request a new invitation from your preferred hierarchy or agency.

[ABORT CASE](#) [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

The screenshot shows a web form titled "My Certification Cases" with a navigation bar containing "DEMOGRAPHICS", "PAYMENT" (highlighted in blue), "STATE LICENSES", and "SUBMIT". A red asterisk note states: "Fields marked with an asterisk (*) are required." The form includes a "Payee" section with a text input field, a paragraph of explanatory text, and a question: "Do you want to declare a private company to be your payee? *". The answer field for this question is highlighted with a red box and contains "--". Below this is a "Banking Information" section with another text input field. At the bottom, there is a "Payment Method" section with a text input field containing "--". Two buttons are at the bottom: "ABORT CASE" (red) and "CONTINUE" (blue).



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**

Do you want to declare a private company to be your payee? * Yes

As you declared "yes", you will need to provide additional information regarding your payee in the section below. The information you enter below will be used to electronically generate a IRS W-9 Form.

Business Entity Information

Taxpayer ID Number* _____

Business Name DBA* _____

Business Address * _____

Business City * _____

Business State * -- _____

Business Zip * _____

W-9 Information

Taxation Type * -- _____

I declare that I am legally authorized to execute contracts and agreements on behalf of myself or the legal entity I represent. *

Banking Information

Payment Method -- _____

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**

Do you want to declare a private company to be your payee? *

Banking Information

Payment Method

Account Type *

[?] Account Number: *

Verify Account Number *

[?] Routing Number: *

Financial Institution *



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**

Fields marked with an asterisk (*) are required.

Banking Information

Based on the information collected in previous steps, no additional data needs to be collected here. Please click on "Continue" to proceed.



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**

My Certification Cases

DEMOGRAPHICS PAYMENT **STATE LICENSES** SUBMIT

License Information

The licenses shown below reflect active licenses you hold in states where Wellcare offers Medicare Advantage and/or Prescription Drug plans. Please elect licenses where you plan to market / sell Wellcare products. Please note, you will be able to update your elections within your portal at any time.
Your Resident State License is automatically selected.

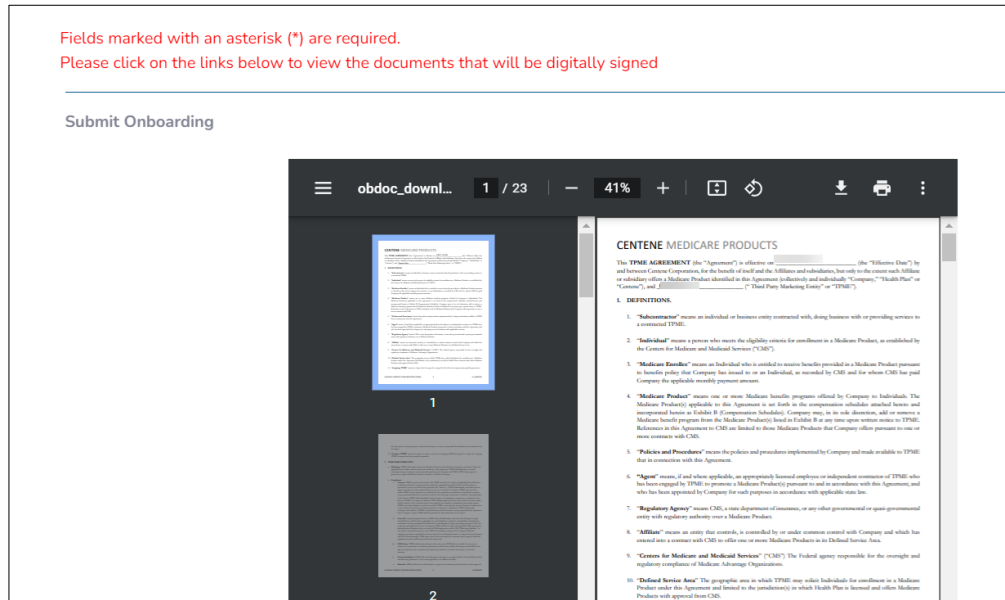
<input checked="" type="checkbox"/> AR - Arkansas	<input type="checkbox"/> MS - Mississippi
<input type="checkbox"/> LA - Louisiana	<input type="checkbox"/> TX - Texas

ABORT CASE **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**



I have read and agree to the terms and conditions of the contract

I understand that my submission of this application means that I have read and understand the contents of this application, and that I confirm that the information I have provided is accurate.

03/08/2022

IP Address * 68.207.245.89, 68.207.245.89

Please sign your name in the space below.



CLEAR

ABORT CASE

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**

Submission Successful!

Thank you for submitting your application.

You can download a copy of your electronically signed contract below.

DOWNLOAD CONTRACT

Before you go...

As an agency, you **must** have at least one of your principals onboarded as a Field Broker in our system and they must be declared as the principal of your agency. Otherwise your agency will not be certified and will remain in a "Suspended" status. Please enter your principal broker's NPN (National Producer Number) in the box below and then click "Begin".

NPN

BEGIN

My Certification Cases

PRINCIPALS | BROKERS | STATE LICENSES | **SUBMIT**

Principal Declaration

The NPN entered belongs to an active Field Broker in our system and they are eligible to become the principal of your agency.

Name:

NPN:

Are you sure you would like to send a workflow request to this Field Broker to be assigned principal of your agency?

CREATE **SEND REQUEST**



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](#).

The screenshot shows a web form titled "Create Principal Onboarding Case". The form contains the following fields and options:

- LoB ***: A dropdown menu with "MEDICARE ADVANTAGE - MA" selected.
- Onboarding Type ***: A dropdown menu with "FIELD BROKER" selected.
- Sub Type ⓘ ***: A dropdown menu with "NOTHING SELECTED" selected. Below it, a list of options is visible: "Principal - Selling" and "Principal - Non Selling".
- Email ***: A text input field.
- Secondary Email**: A text input field.
- Immediate Upline ***: A text input field.
- CREATE CASE**: A green button at the bottom right of the form.

Two red boxes highlight the "Sub Type" dropdown menu and the "CREATE CASE" button.





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Questions?

