



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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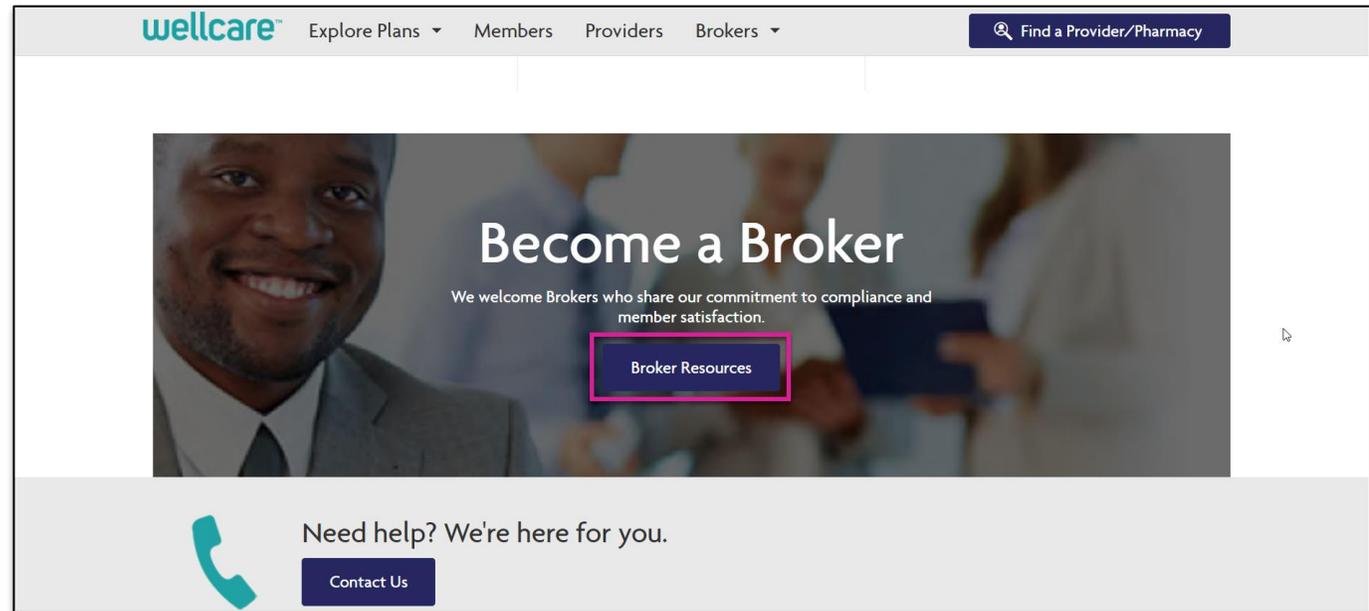
Initiating a Broker Contract



Initiating a Broker Contract

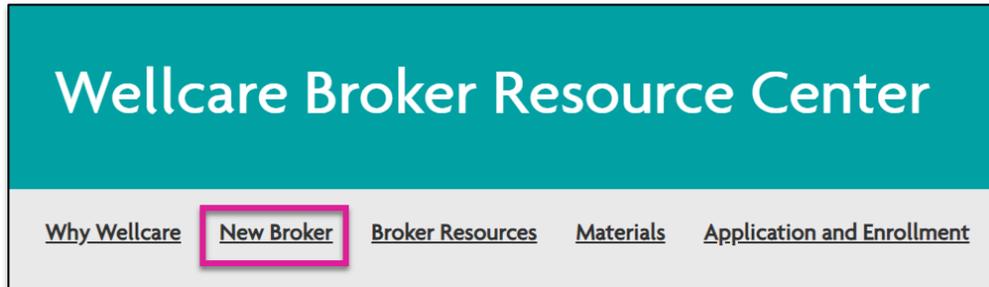
Brokers who wish to contract direct to Wellcare can initiate their onboarding directly from the Wellcare website.

1. Navigate to <https://www.wellcare.com/>
2. Scroll down to **Become a Broker.**
3. Select **Broker Resources.**

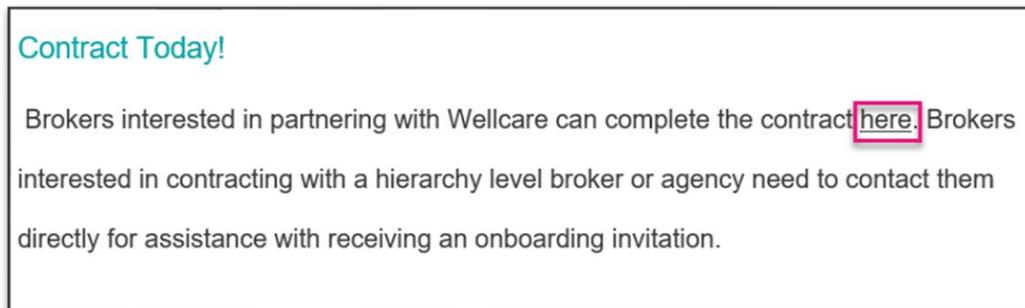


Initiating a Broker Contract

4. Select **New Broker**.



5. Select the link under **Contract Today!**



Note: If you are wishing to be associated with an agency, you must contact that agency for onboarding.

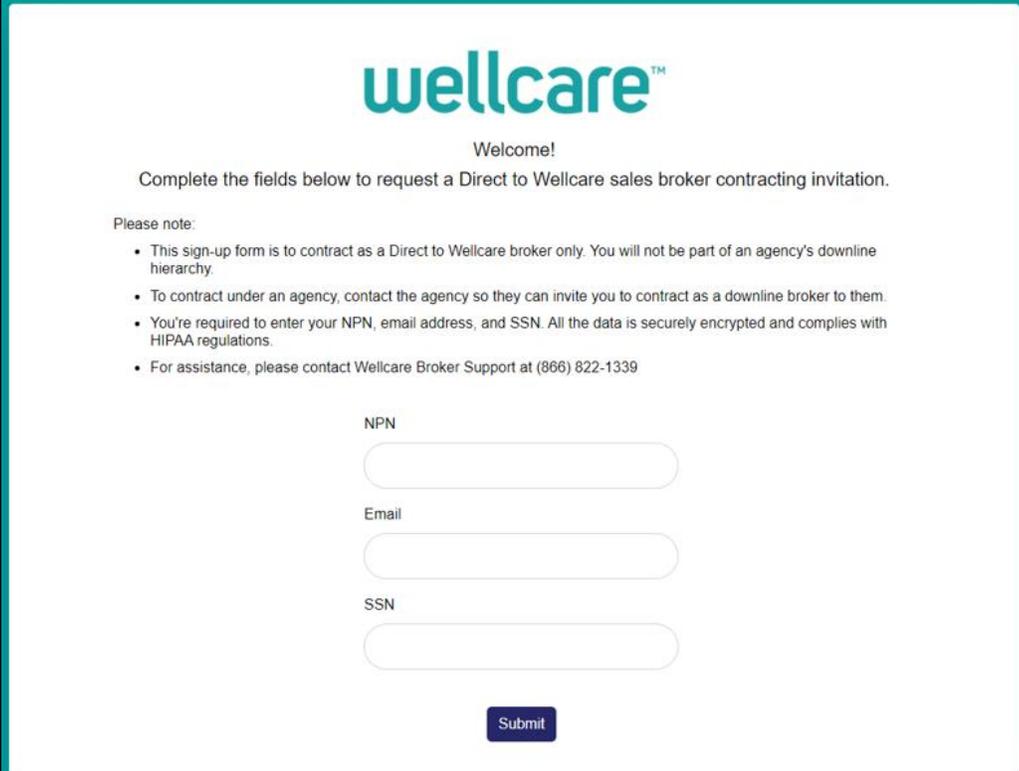


Initiating a Broker Contract

6. Once you are ready to self-onboard as a Direct to Wellcare broker, you will need to have the following information ready to enter:

- NPN
- Email Address
- SSN

7. Select **Submit**.



The screenshot shows a web form for Wellcare. At the top is the Wellcare logo. Below it is a "Welcome!" message and a request to complete fields for a Direct to Wellcare sales broker contracting invitation. A "Please note:" section contains three bullet points: 1) This form is for contracting as a Direct to Wellcare broker only, not as a downstream broker. 2) To contract under an agency, contact the agency for an invitation. 3) Required fields are NPN, email, and SSN, which are encrypted and HIPAA-compliant. A contact number (866) 822-1339 is provided for assistance. Below the text are three input fields labeled "NPN", "Email", and "SSN". A blue "Submit" button is at the bottom.

wellcare™

Welcome!

Complete the fields below to request a Direct to Wellcare sales broker contracting invitation.

Please note:

- This sign-up form is to contract as a Direct to Wellcare broker only. You will not be part of an agency's downline hierarchy.
- To contract under an agency, contact the agency so they can invite you to contract as a downline broker to them.
- You're required to enter your NPN, email address, and SSN. All the data is securely encrypted and complies with HIPAA regulations.
- For assistance, please contact Wellcare Broker Support at (866) 822-1339

NPN

Email

SSN

Submit

Initiating a Broker Contract

If all information provided is valid, you will see a message confirming the onboarding invitation has been initiated.

Please locate the email within your inbox and follow the instructions to complete the onboarding process. If you are unable to locate the email, be sure to check your trash/spam folder for the invitation.

The Wellcare logo is displayed in a teal color, featuring the word "wellcare" in a lowercase, sans-serif font with a trademark symbol (TM) to the upper right of the "e".

An onboarding invitation has been sent from Centene@evolvenxt.com to your email.
Please follow the email instructions to complete the onboarding process.

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 Single Sign-on 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 Ping One Single Sign-On page.
3. Type your **Username** (this will be your **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 (see below for password requirements).

CENTENE Corporation
CenteneONE-Test

Change Password

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

Current Password

New Password

Verify New Password

Change Password

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**.

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.

CENTENE
Corporation
CenteneONE-Test

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.

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.

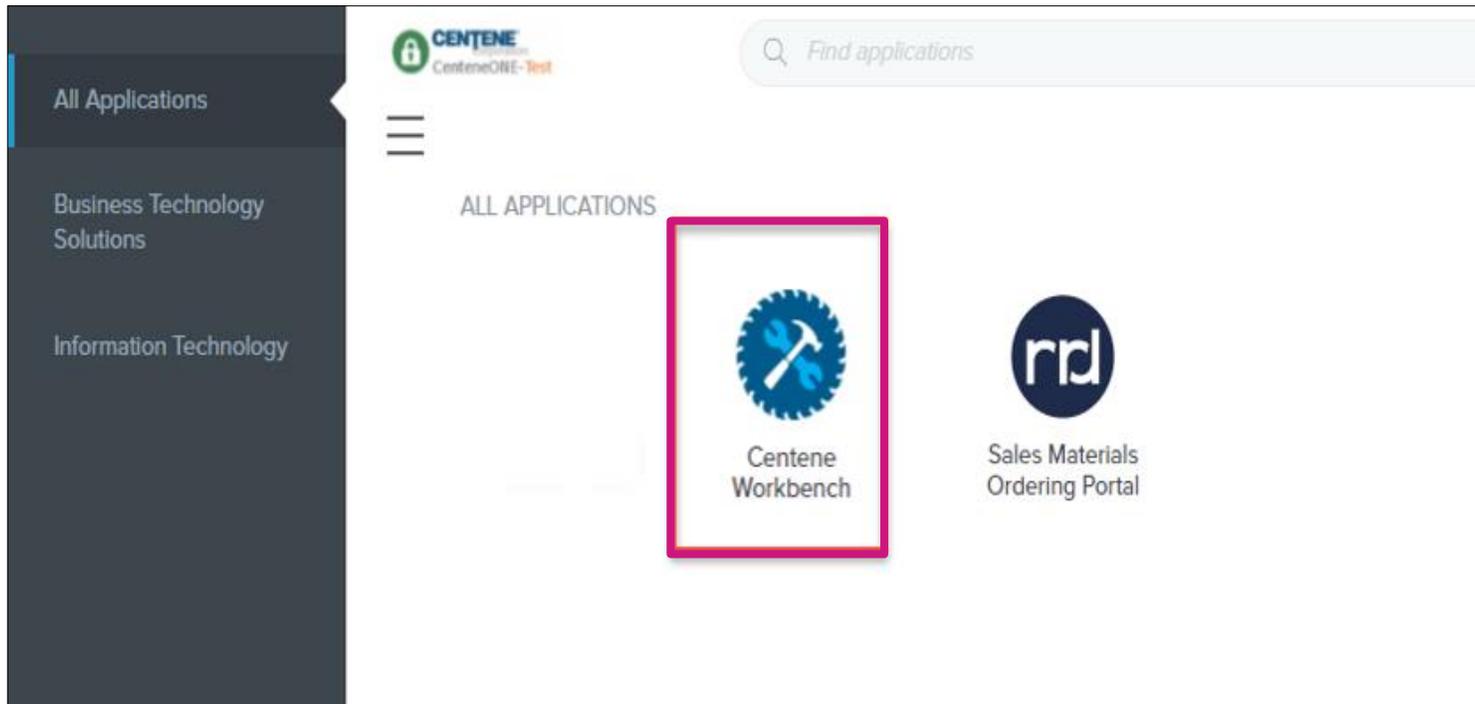
Get Started

Dismiss



Receiving Email Invitation and Logging into PingOne

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

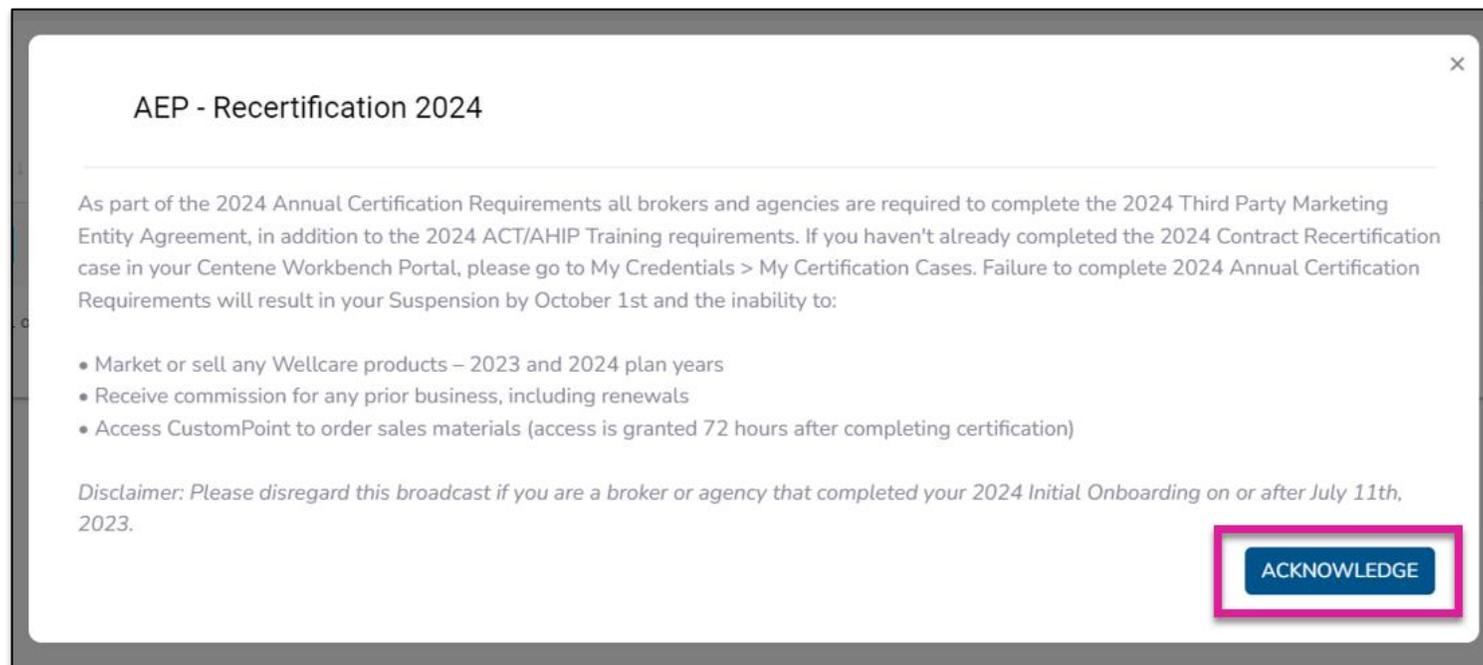


Completing A Contract



Completing a Contract

Once you have entered the Centene Workbench Portal, acknowledge any available notices to proceed.



AEP - Recertification 2024

As part of the 2024 Annual Certification Requirements all brokers and agencies are required to complete the 2024 Third Party Marketing Entity Agreement, in addition to the 2024 ACT/AHIP Training requirements. If you haven't already completed the 2024 Contract Recertification case in your Centene Workbench Portal, please go to My Credentials > My Certification Cases. Failure to complete 2024 Annual Certification Requirements will result in your Suspension by October 1st and the inability to:

- Market or sell any Wellcare products – 2023 and 2024 plan years
- Receive commission for any prior business, including renewals
- Access CustomPoint to order sales materials (access is granted 72 hours after completing certification)

Disclaimer: Please disregard this broadcast if you are a broker or agency that completed your 2024 Initial Onboarding on or after July 11th, 2023.

ACKNOWLEDGE

Completing A Contract

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

My Certification Cases

Search by Name: _____

Name	LOB	Year	Type	NPN	Sales Level	Affiliated Agency/Team	Submitted By	Creation Date	Status
[Redacted]	Medicare Advantage	2022	Initial	[Redacted]	Broker	[Redacted]	[Redacted]	03/08/2022	Created - New

Showing 1 to 1 of 1 entries

FIRST PREVIOUS 1 NEXT 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.

Before You Begin...

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:

NPN	[Redacted]
First Name	[Redacted]
Last Name	[Redacted]
SSN	[Redacted]

Do not include hyphens nor spaces

VALIDATE



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.

My Certification Cases

DEMOGRAPHICS PAYMENT STATE LICENSES SUBMIT

Fields marked with an asterisk (*) are required.

Personal Information

First Name* [Redacted]
Middle Initial [Redacted]
Last Name* [Redacted]
SSN* [Redacted]
NPA* [Redacted]
DOB* [Redacted]
Mobile Phone* [Redacted]
Business Phone* [Redacted]
Marketing Phone [Redacted]
Email* [Redacted]
Secondary Email [Redacted]
Job Title [Redacted]

My Certification Cases

DEMOGRAPHICS PAYMENT STATE LICENSES SUBMIT

Shipping Address Information

Shipping Address Same as Residence? * No

Address 1* [Redacted]
Address 2 [Redacted]
City* [Redacted]
State* [Redacted]
Zip Code* [Redacted]

Broker Information

Broker Type [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.



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? *

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



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 notification bell and a user profile icon are in the top right. Below the navigation bar, a red note states "Fields marked with an asterisk (*) are required." The "Payee" section includes a text input field, a paragraph of explanatory text, and a dropdown menu for "Do you want to declare a private company to be your payee?*" with "--" selected. The "Banking Information" section has a "Payment Method" dropdown also set to "--". At the bottom are "ABORT CASE" and "CONTINUE" buttons.



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.

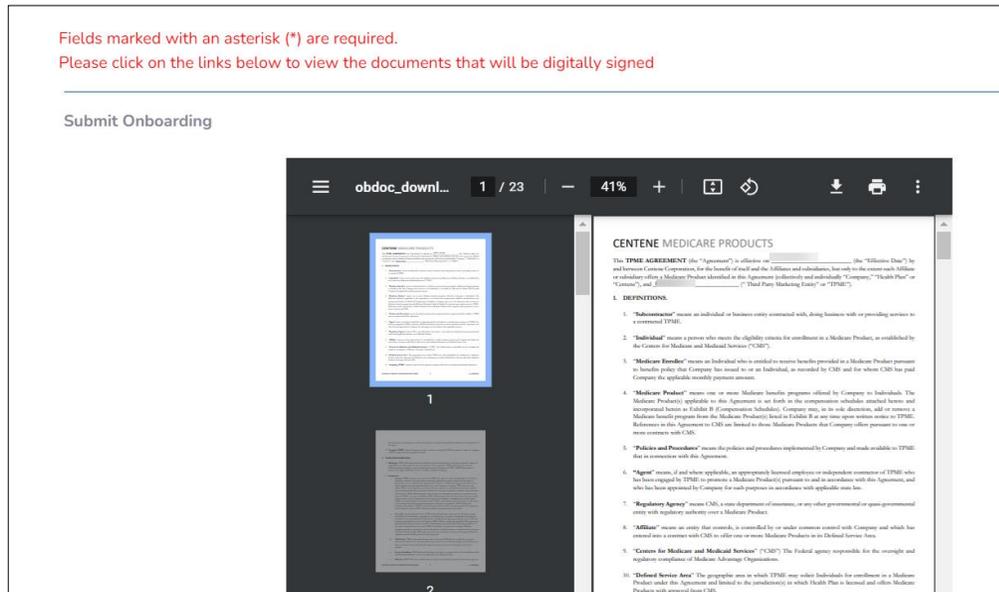
<input checked="" type="checkbox"/> AR - Arkansas	<input type="checkbox"/> MS - Mississippi
<input type="checkbox"/> LA - Louisiana	<input type="checkbox"/> TX - Texas

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

PRINCIPAL

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 request they can accept you 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 several fields and a button:

- 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. A pink box highlights this dropdown, and a list is open showing two options: "Principal - Selling" (with a radio button) and "Principal - Non Selling" (with a radio button).
- 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, highlighted with a pink box.

