



Agent Connect User Guide

February 27, 2018



Table of Contents

- [Access & Login Information](#)
- [Creating Support Tickets](#)
 - [Attaching Files to Support Tickets](#)
 - [Monitoring WellCare Response](#)
- [Downloading Statements and Book of Business](#)
- [Changes to Agent Profile in Agent Workflow](#)
 - [Agent 360 Validation](#)
- [Demographic changes](#)
- [Hierarchy & Commission Assignment Changes](#)
 - [Hierarchy Change/Assignment](#)
 - [Hierarchy Change/Assignment Rejected](#)
 - [Hierarchy Change/Assignment Complete](#)
 - [Commission Change/Assignment](#)
 - [Commission Assignment Complete](#)
- [Required Forms & Acknowledgement](#)
 - [W9](#)
- [Licensing](#)
- [Review & Submit Changes](#)
 - [Confirmation Page](#)

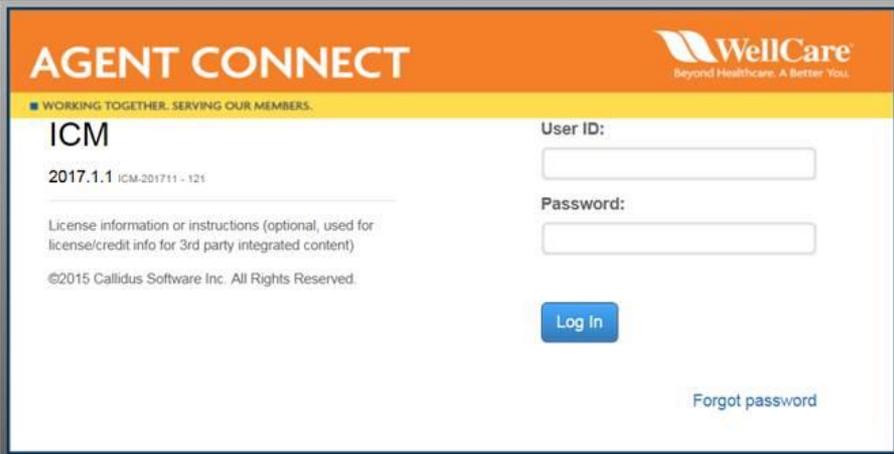


Access & Login Information



Login to Agent Connect

Enter your username (agent ID) and initial temporary password provided in the *Welcome to Agent Connect* email.



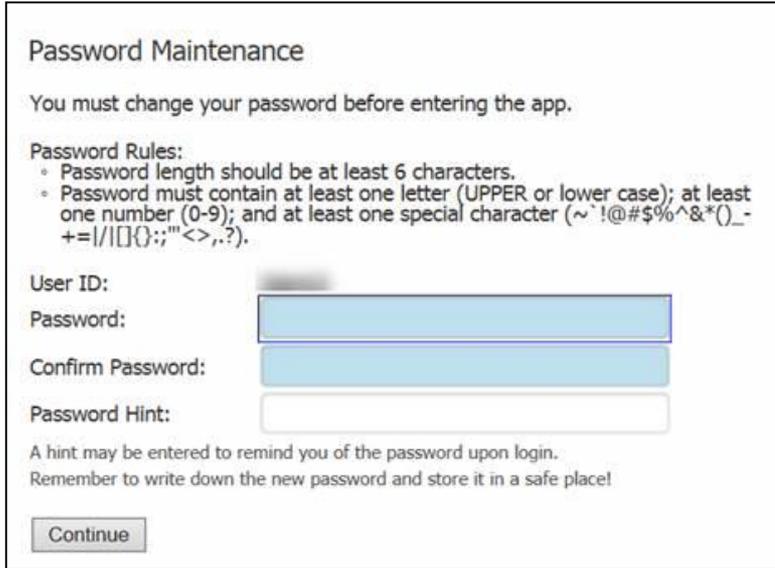
Step 2:
Follow prompts to set a permanent password.

Click *Continue* to access your agent portal.

Step 1:

Click the hyperlink to access the Agent Connect login page.

Enter the username (agent ID) and temporary password provided in the invite.



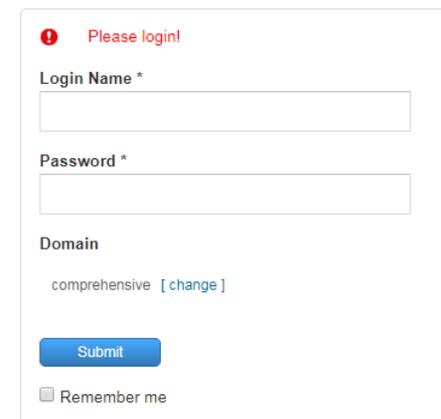
Login to Agent Workflow

Login to Agent Workflow from your portal homepage with your username (email) and initial temporary password (WellCare1) to make changes to your agent profile.



Step 1: Select *Agent Workflow* from the left menu within your Agent Connect profile.

Step 2: Once on the user login page, enter your credentials and click *Submit*.



A login form with a white background and a thin border. At the top left, there is a red error message: 'Please login!'. Below this, there are three input fields: 'Login Name *', 'Password *', and 'Domain'. The 'Domain' field contains the text 'comprehensive [change]'. At the bottom of the form, there is a blue 'Submit' button and a checkbox labeled 'Remember me'.

[Forgot your password?](#)



The screenshot shows the WellCare logo at the top left. Below it is a light blue information box with a circular 'i' icon and a list of password requirements. Underneath the box are two input fields for 'New Password *' and 'Confirm Password *'. At the bottom of the form are two buttons: 'Change Password' and 'Log Off'.

WellCare
Beyond Healthcare. A Better You.

- Please set a new password. Your password must be changed to protect the integrity of your account.
- Password must contain Letters and numbers
- Password must have more than 8 characters.
- Password must have less than 20 characters.

New Password *

Confirm Password *

[Change Password](#) [Log Off](#)

Step 3: Complete the asterisked fields and click *Change Password*.

At this point, you will be taken to your homepage

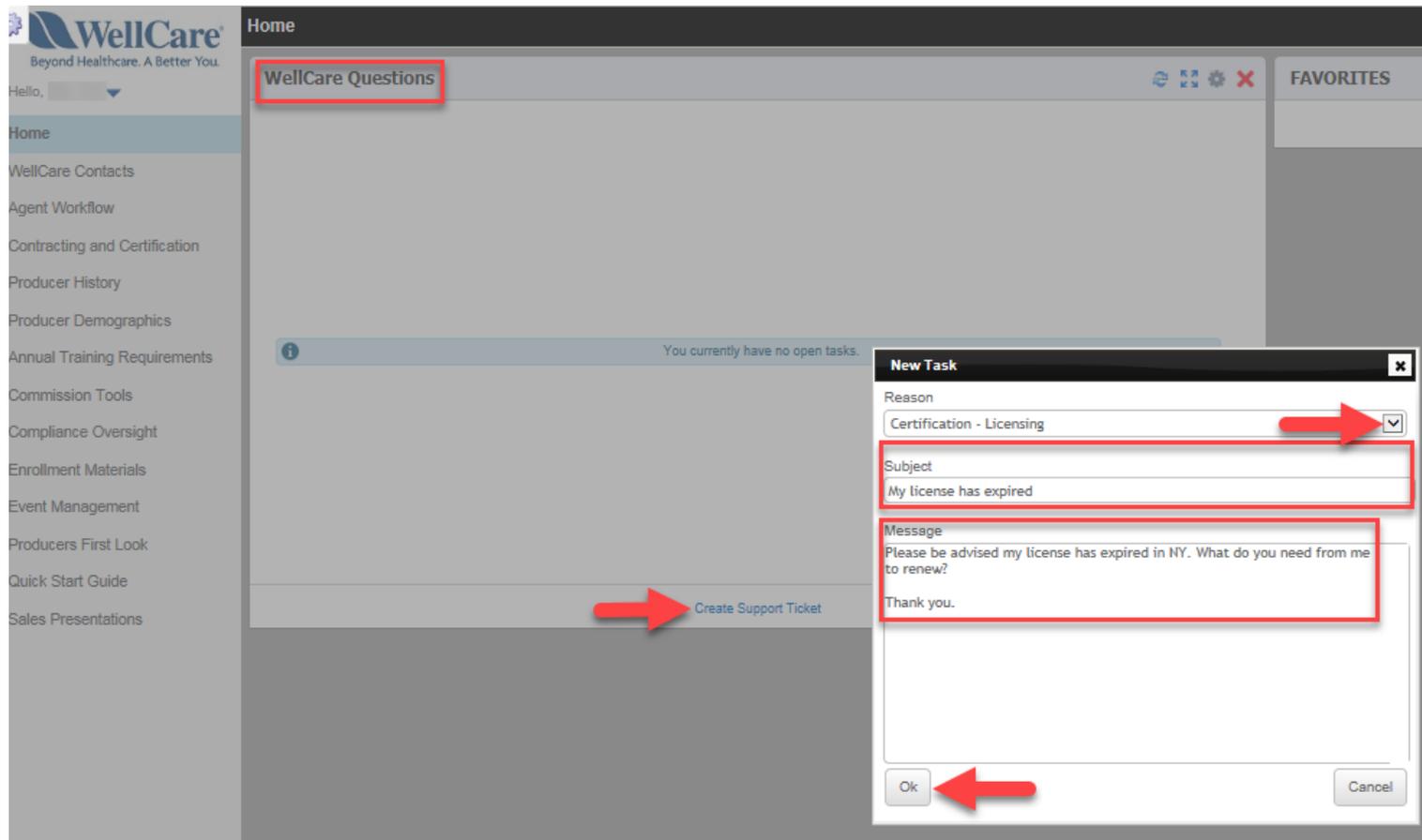


Creating Support Tickets

Creating Support Tickets

Take the following steps to create a support ticket.

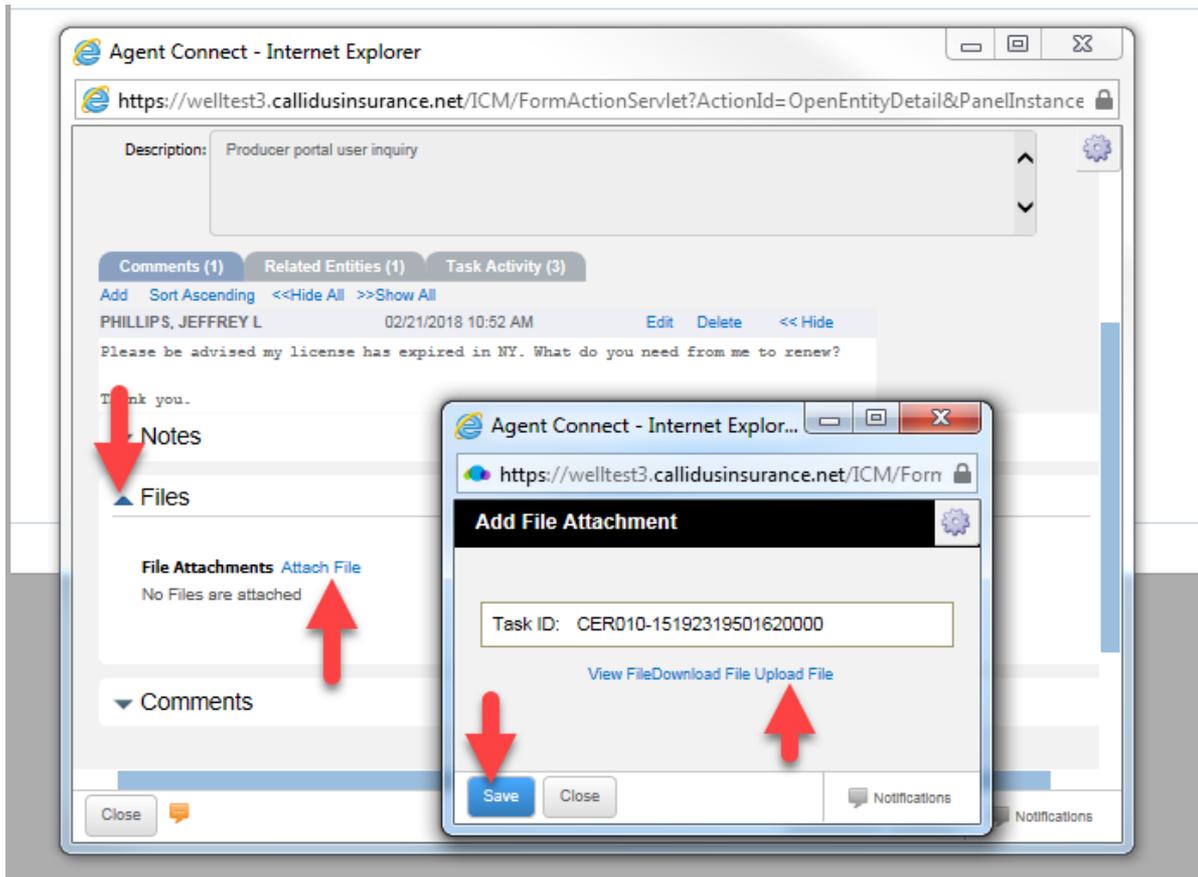
1. Click *Create Support Ticket* in your WellCare Questions widget
2. Once the window populates, select a topic from the reason drop down, enter a subject/message and click *OK*



Attaching Files to Support Tickets

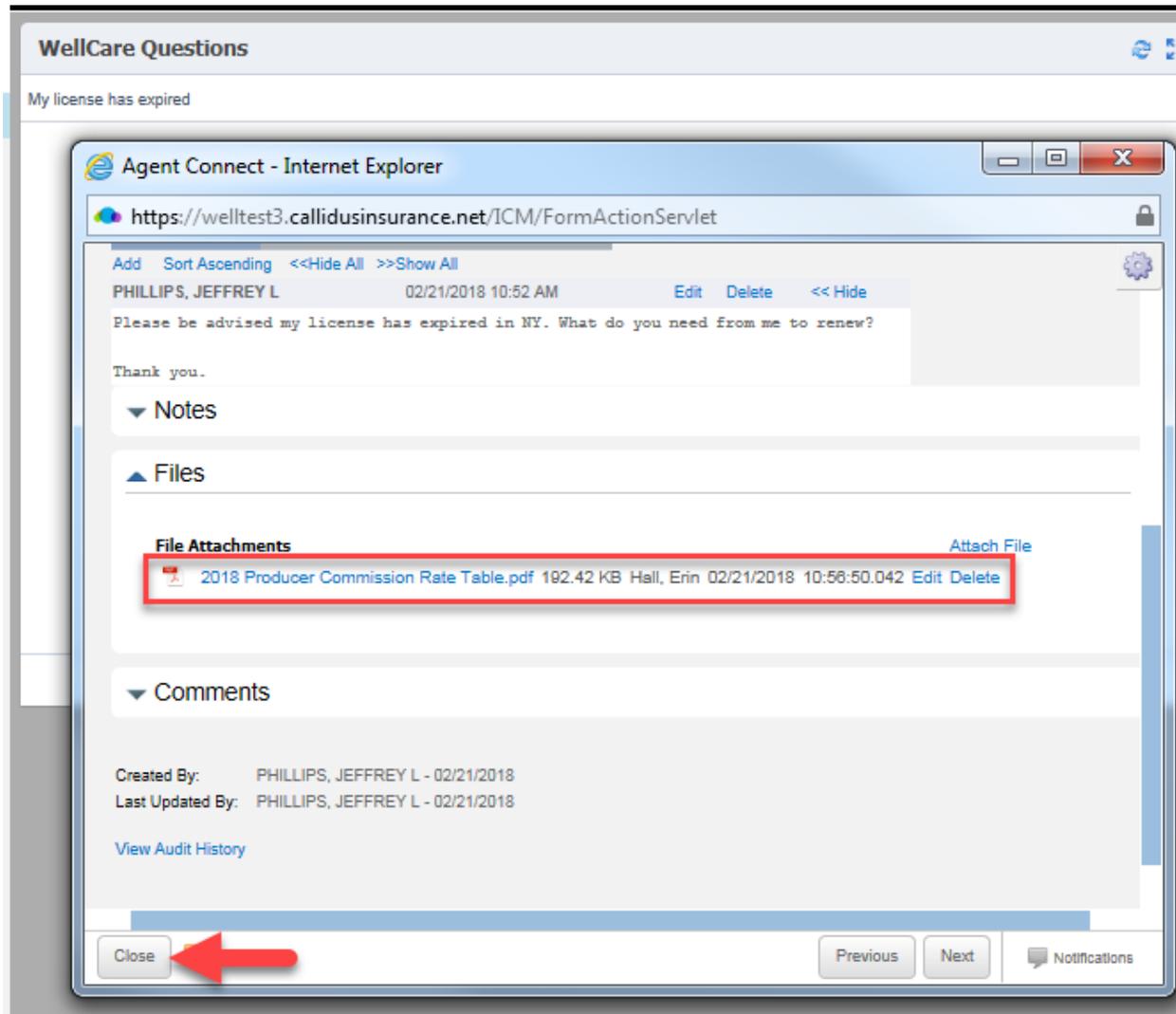
To attach a file to a ticket after submission, take the following steps.

1. Click the boxed arrow next to the subject line 
2. Once the window populates, click the *Files* drop down, click *Attach File* and click *Upload File* to browse your computer and select a file
3. Click *Save*



Attaching Files to Support Tickets

The attached file will reflect under File Attachments. Click Close to return to your homepage.



The screenshot displays a web browser window titled "Agent Connect - Internet Explorer" showing a support ticket in the "WellCare Questions" system. The ticket title is "My license has expired". The ticket details include the name "PHILLIPS, JEFFREY L", the date and time "02/21/2018 10:52 AM", and the message: "Please be advised my license has expired in NY. What do you need from me to renew? Thank you." Below the message are sections for "Notes", "Files", and "Comments". The "Files" section is expanded, showing a "File Attachments" table with one entry: "2018 Producer Commission Rate Table.pdf" (192.42 KB) by "Hall, Erin" on "02/21/2018 10:56:50.042". The entry has "Edit" and "Delete" links. A red box highlights this row. At the bottom left of the interface, a "Close" button is highlighted with a red arrow. Other buttons include "Previous", "Next", and "Notifications".

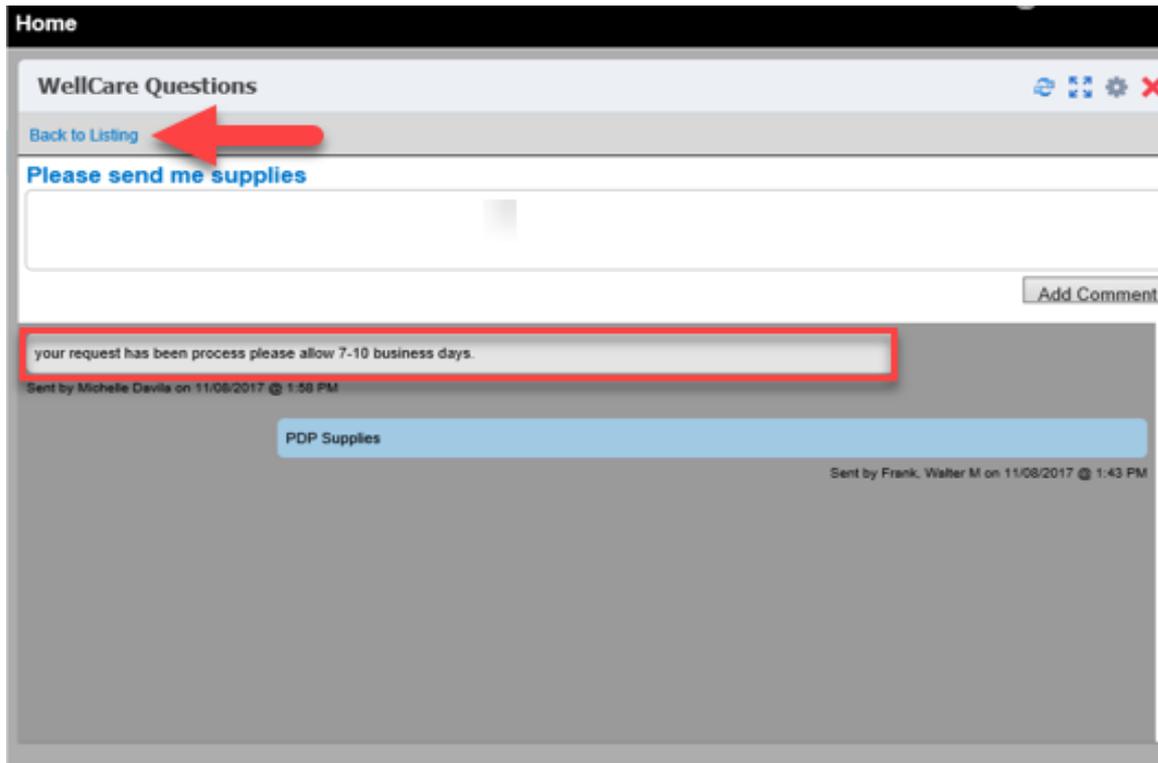
File Attachments				Attach File		
	2018 Producer Commission Rate Table.pdf	192.42 KB	Hall, Erin	02/21/2018 10:56:50.042	Edit	Delete

Monitoring WellCare Response

Once WellCare has responded to the ticket, the ticket subject will show in bold. Select the  to open the response.

Inquiries/comments from the producer will be highlighted in blue and responses from WellCare will be highlighted in white. If you have additional questions related to this inquiry, you can comment directly back to WellCare within the conversation thread by typing in the text box and selecting Add Comment. Please allow time for WellCare to respond.

To return to the homepage queue, click *Back to Listing*.



The screenshot shows a web interface titled "Home" with a "WellCare Questions" header. Below the header is a "Back to Listing" link with a red arrow pointing to it. The main content area displays a question: "Please send me supplies" in blue text, followed by a text input field and an "Add Comment" button. Below this is a response in a white box: "your request has been process please allow 7-10 business days." with a red border. The response is attributed to "Michelle Devila on 11/08/2017 @ 1:58 PM". Below the response is a blue box containing the text "PDP Supplies", attributed to "Frank, Walter M on 11/08/2017 @ 1:43 PM".

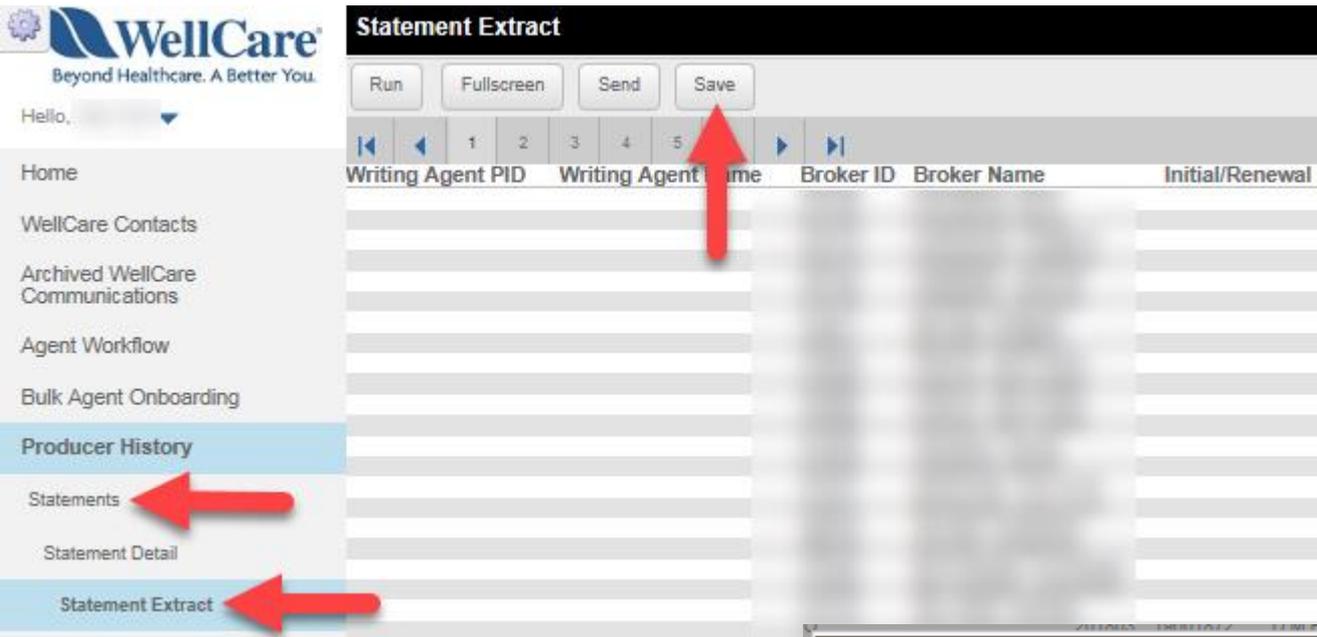


Downloading Commission Statements and Book of Business



Commission Statements

Within the Producer History tab in Agent Connect you have the ability to download your commission statements. Take the following steps to export:

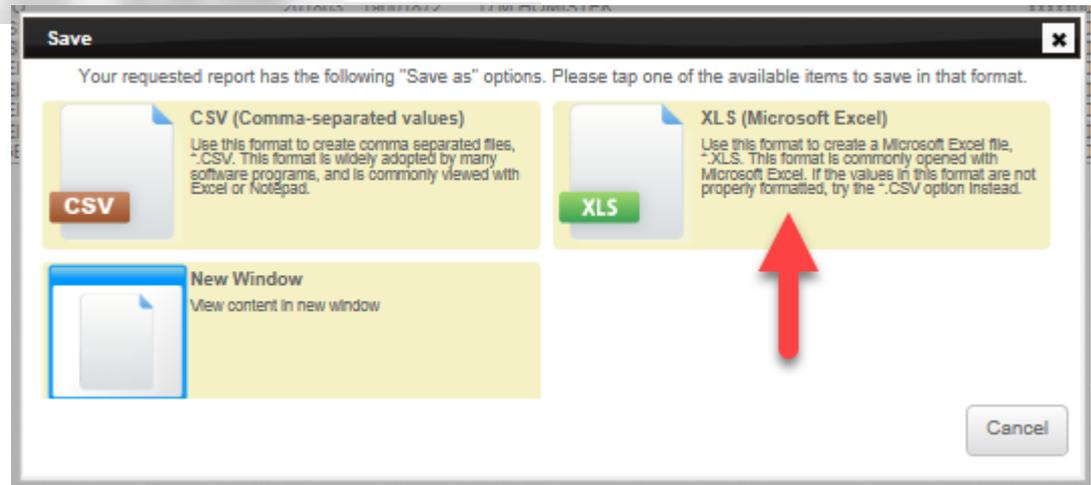


Step 1:
Click the Statements sub-tab under the Producer History menu tab

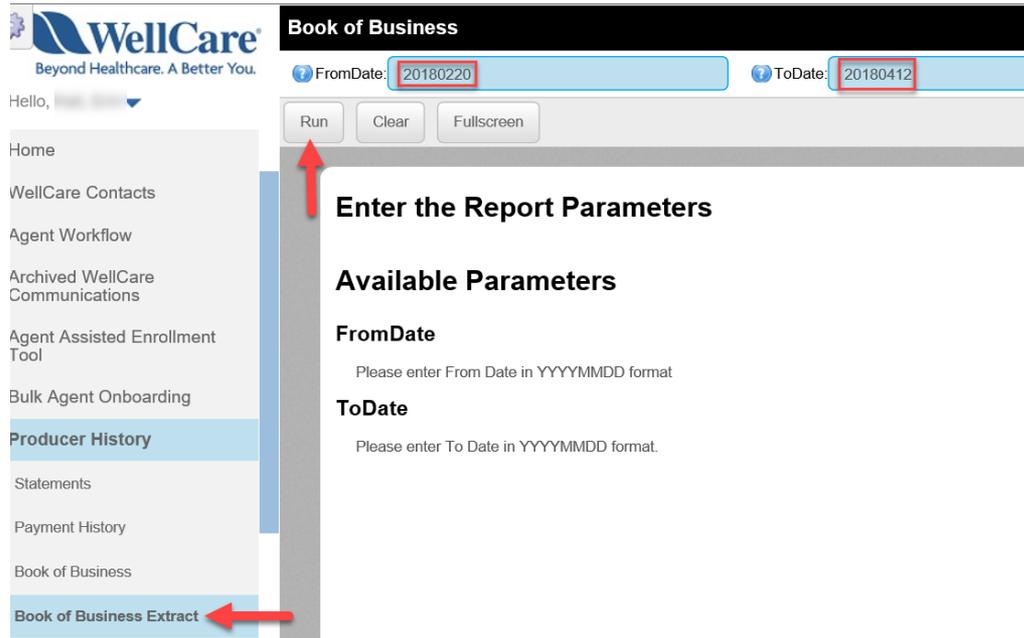
Click the Statement Extract sub-tab

Step 2:
Once in the extract screen, click Save at the top of the screen

Click the Excel (XLS) icon to export to Excel



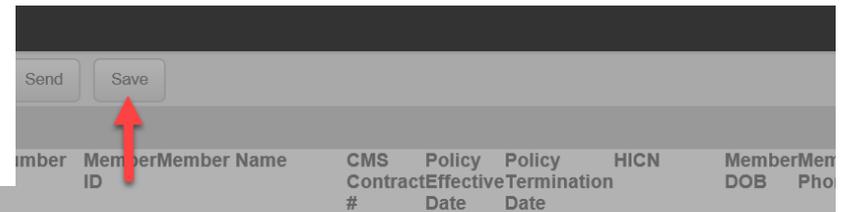
Within the Producer History tab in Agent Connect you have the ability to download your book of business in Excel format. Take the following steps to export:



Step 1:

Click the Book of Business Extract sub-tab

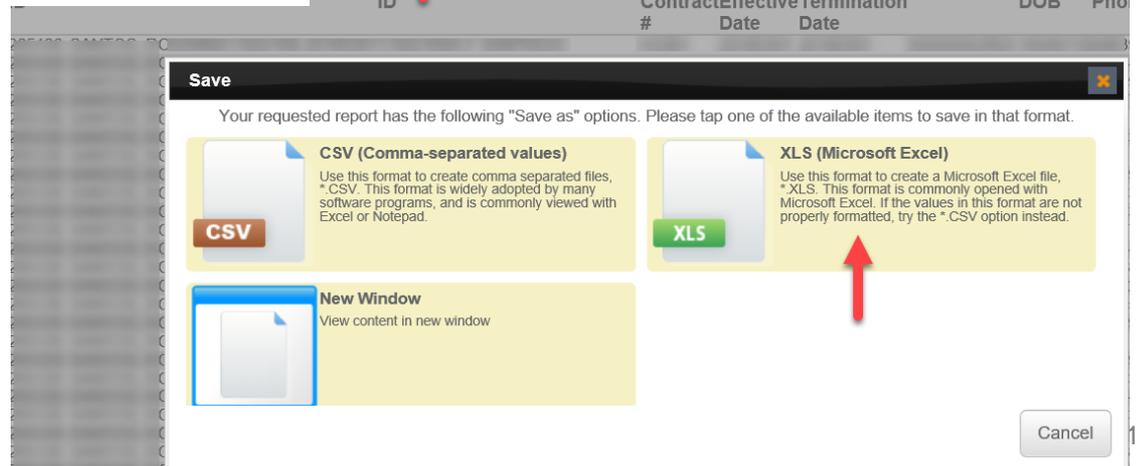
Enter the date in YYYYMMDD format in the *FromDate* and *ToDate* fields at the top of the screen, and click *Run*



Step 2:

Click *Save*

Click the Excel (XLS) icon to export to Excel



Changes to Agent Profile in Agent Workflow



Agent 360 Validation

Step 1. Log in to Agent Workflow

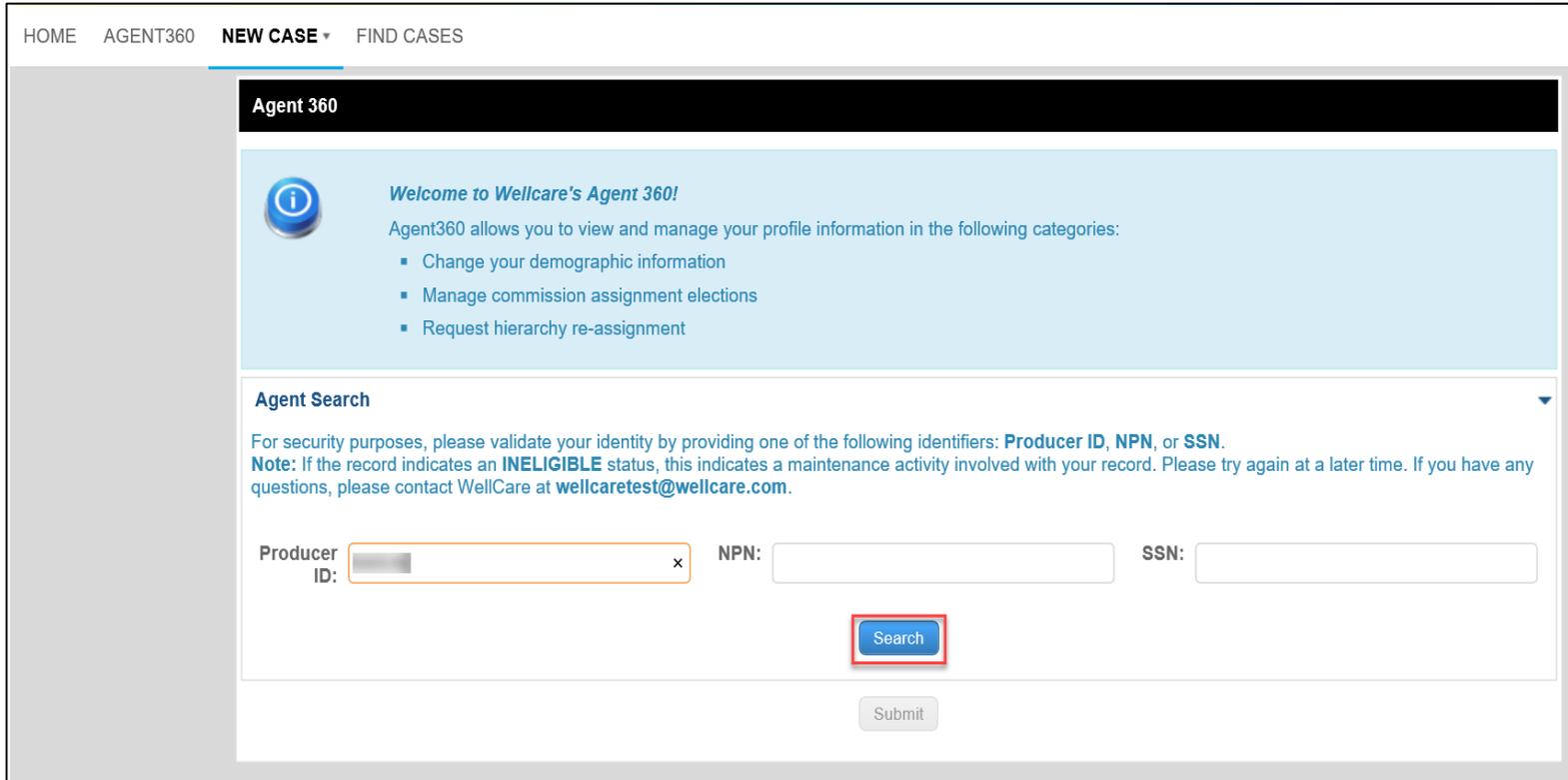
Step 2. Click *Agent 360*



The screenshot displays the WellCare Agent 360 interface. At the top, the WellCare logo and tagline "Beyond Healthcare. A Better You." are visible. Below the logo, there is a navigation bar with "HOME" and "AGENT360" (highlighted with a red box), along with "NEW CASE" and "FIND CASES" options. A search bar for "Case Id" is located on the right. The main content area shows a table titled "Open cases assigned to me" with columns for Case Key, Case Name, Created On, Status, and Updated. The table lists 10 cases, each with a blue hyperlink for the Case Key. At the bottom of the table, it indicates "21 items found, displaying 1 to 10." and provides options for CSV, Excel, XML, and PDF exports, along with pagination controls for 1, 2, and 3 items per page.

Case Key	Case Name	Created On	Status	Updated
Agent Onboarding-ONBD-1360		01/30/2018 16:30:01	Agent Validation	01/30/2018 16:30:15
Agent Onboarding-ONBD-387		07/25/2017 10:40:01	Pending Training	07/27/2017 13:52:29
Agent Onboarding-ONBD-407		07/25/2017 15:10:01	W9	07/27/2017 13:15:45
Agent Onboarding-ONBD-469		07/27/2017 10:10:01	Agent Validation	07/27/2017 10:10:10
Agent Onboarding-ONBD-403		07/25/2017 14:30:01	Interview	07/26/2017 08:52:13
Agent Onboarding-ONBD-385		07/25/2017 10:01:02	Pending Training	07/25/2017 10:22:13
Agent Onboarding-ONBD-372		07/24/2017 21:46:24	Agent Validation	07/24/2017 21:46:35
Agent Onboarding-ONBD-344		07/24/2017 11:00:01	Review and Submit	07/24/2017 21:45:51
Agent Onboarding-ONBD-355		07/24/2017 14:52:12	Agent Validation	07/24/2017 14:52:15
Agent Onboarding-ONBD-353		07/24/2017 14:40:01	Review and Submit	07/24/2017 14:45:30

Step 3. Input your PID, NPN or SSN and click *Search*.



HOME AGENT360 **NEW CASE** ▾ FIND CASES

Agent 360

 **Welcome to Wellcare's Agent 360!**
Agent360 allows you to view and manage your profile information in the following categories:

- Change your demographic information
- Manage commission assignment elections
- Request hierarchy re-assignment

Agent Search

For security purposes, please validate your identity by providing one of the following identifiers: **Producer ID, NPN, or SSN.**
Note: If the record indicates an **INELIGIBLE** status, this indicates a maintenance activity involved with your record. Please try again at a later time. If you have any questions, please contact WellCare at wellcaretest@wellcare.com.

Producer ID: x NPN: SSN:

Agent 360 Validation

Step 4: Select your information by clicking in the circle next to *Search Results*.

Note: you can only access your information, if you put another person information not associated with your information you will receive an error.

Agent360 allows you to view and manage your profile information in the following categories:

- Change your demographic information
- Manage commission assignment elections
- Request hierarchy re-assignment

Agent Search

For security purposes, please validate your identity by providing one of the following identifiers: **Producer ID, NPN, or SSN.**
Note: If the record indicates an **INELIGIBLE** status, this indicates a maintenance activity involved with your record. Please try again at a later time. If you have any questions, please contact WellCare at wellcaretest@wellcare.com.

Producer ID: NPN: SSN:

Agent Search Results

Below are the records found using the information supplied. Choose a record below to proceed. Please verify that the information listed is your own before continuing.

Search Results

	First Name	Last Name	Producer ID	Date of Birth	Status
<input type="radio"/>					ELIGIBLE

1 total rows, displaying from 1 to 1

Section 1 Demographic Changes

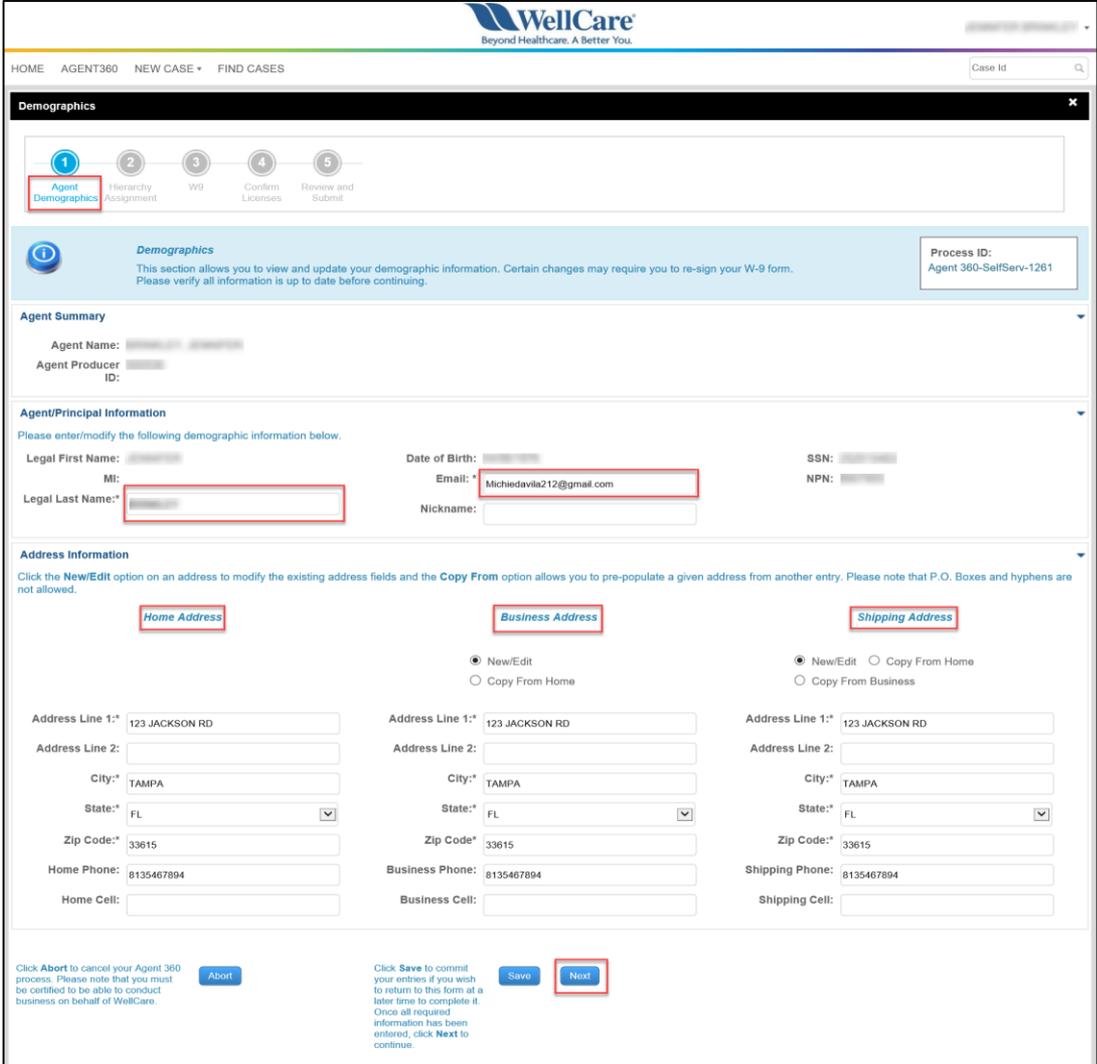
- Name
- Phone Number
- Email Address
- Addresses



Changes to Profile - Demographics

Section 1 allows you to change your name, email address, phone number, personal addresses.

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.



Demographics

1 Agent Demographics 2 Hierarchy Assignment 3 W9 4 Confirm Licenses 5 Review and Submit

Demographics
This section allows you to view and update your demographic information. Certain changes may require you to re-sign your W-9 form. Please verify all information is up to date before continuing.

Process ID: Agent 360-SelfServ-1261

Agent Summary
Agent Name: [Redacted]
Agent Producer ID: [Redacted]

Agent/Principal Information
Please enter/modify the following demographic information below.

Legal First Name: [Redacted] Date of Birth: [Redacted] SSN: [Redacted]
MI: [Redacted] Email: Michiedavila212@gmail.com NPN: [Redacted]
Legal Last Name: [Redacted] Nickname: [Redacted]

Address Information
Click the **New/Edit** option on an address to modify the existing address fields and the **Copy From** option allows you to pre-populate a given address from another entry. Please note that P.O. Boxes and hyphens are not allowed.

Home Address **Business Address** **Shipping Address**

New/Edit Copy From Home New/Edit Copy From Home New/Edit Copy From Business

Address Line 1:* 123 JACKSON RD Address Line 1:* 123 JACKSON RD Address Line 1:* 123 JACKSON RD
Address Line 2: Address Line 2: Address Line 2:
City:* TAMPA City:* TAMPA City:* TAMPA
State:* FL State:* FL State:* FL
Zip Code:* 33615 Zip Code:* 33615 Zip Code:* 33615
Home Phone: 8135467894 Business Phone: 8135467894 Shipping Phone: 8135467894
Home Cell: Business Cell: Shipping Cell:

Click **Abort** to cancel your Agent 360 process. Please note that you must be certified to be able to conduct business on behalf of WellCare. **Abort**

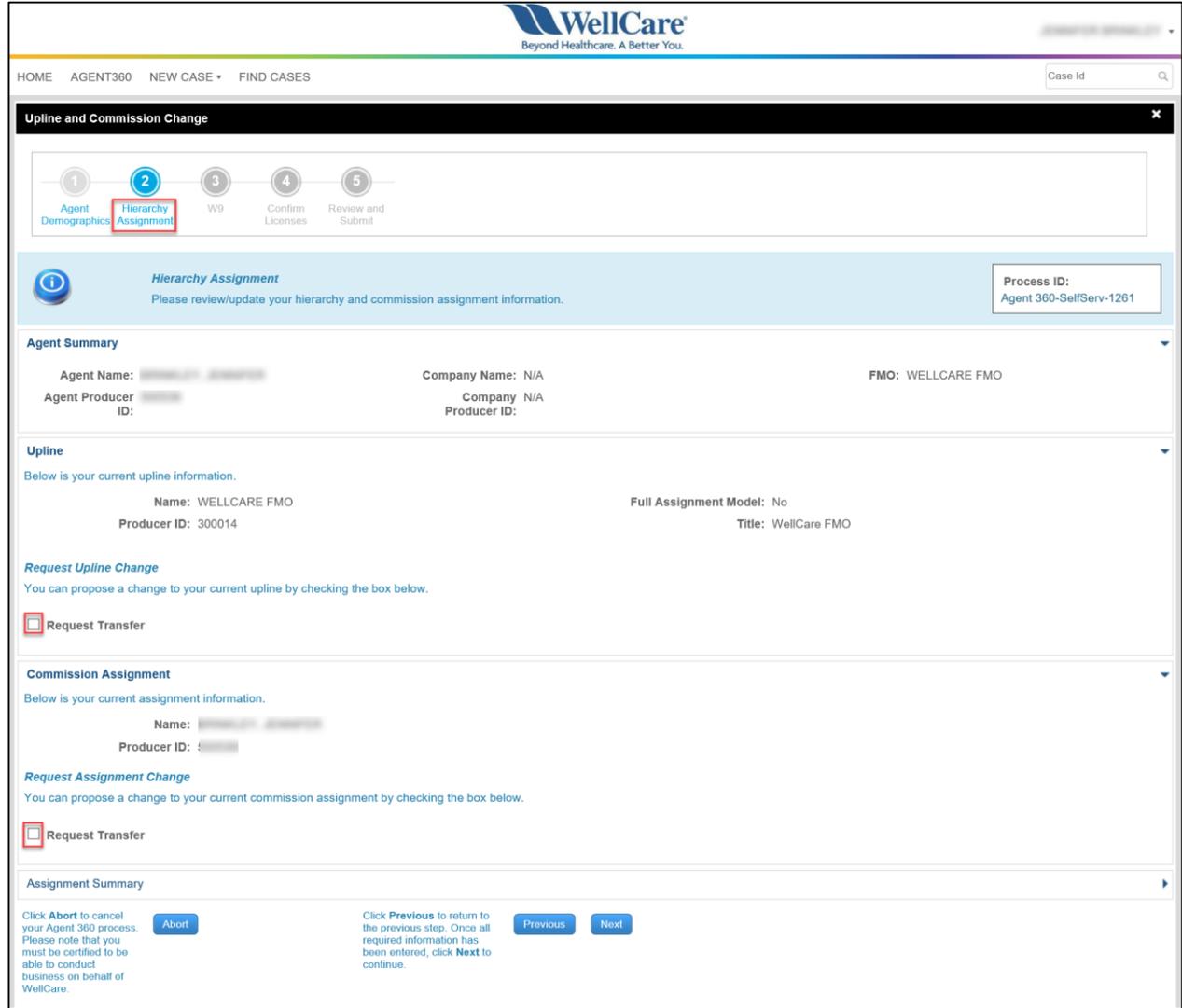
Click **Save** to commit your entries if you wish to return to this form at a later time to complete it. Once all required information has been entered, click **Next** to continue. **Save** **Next**



Section 2: Hierarchy and Commission Assignment Changes

Hierarchy & Commission Assignment

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.



WellCare
Beyond Healthcare. A Better You.

HOME AGENT360 NEW CASE ▾ FIND CASES

Upline and Commission Change ✕

1 Agent Demographics 2 **Hierarchy Assignment** 3 W9 4 Confirm Licenses 5 Review and Submit

Hierarchy Assignment
Please review/update your hierarchy and commission assignment information. Process ID: Agent 360-Self/Serv-1261

Agent Summary

Agent Name: [REDACTED]	Company Name: N/A	FMO: WELLCARE FMO
Agent Producer ID: [REDACTED]	Company Producer ID: N/A	

Upline

Below is your current upline information.

Name: WELLCARE FMO	Full Assignment Model: No
Producer ID: 300014	Title: WellCare FMO

Request Upline Change
You can propose a change to your current upline by checking the box below.

Request Transfer

Commission Assignment

Below is your current assignment information.

Name: [REDACTED]
Producer ID: [REDACTED]

Request Assignment Change
You can propose a change to your current commission assignment by checking the box below.

Request Transfer

Assignment Summary

Click **Abort** to cancel your Agent 360 process. Please note that you must be certified to be able to conduct business on behalf of WellCare.

Click **Previous** to return to the previous step. Once all required information has been entered, click **Next** to continue.

Hierarchy Change/Assignment

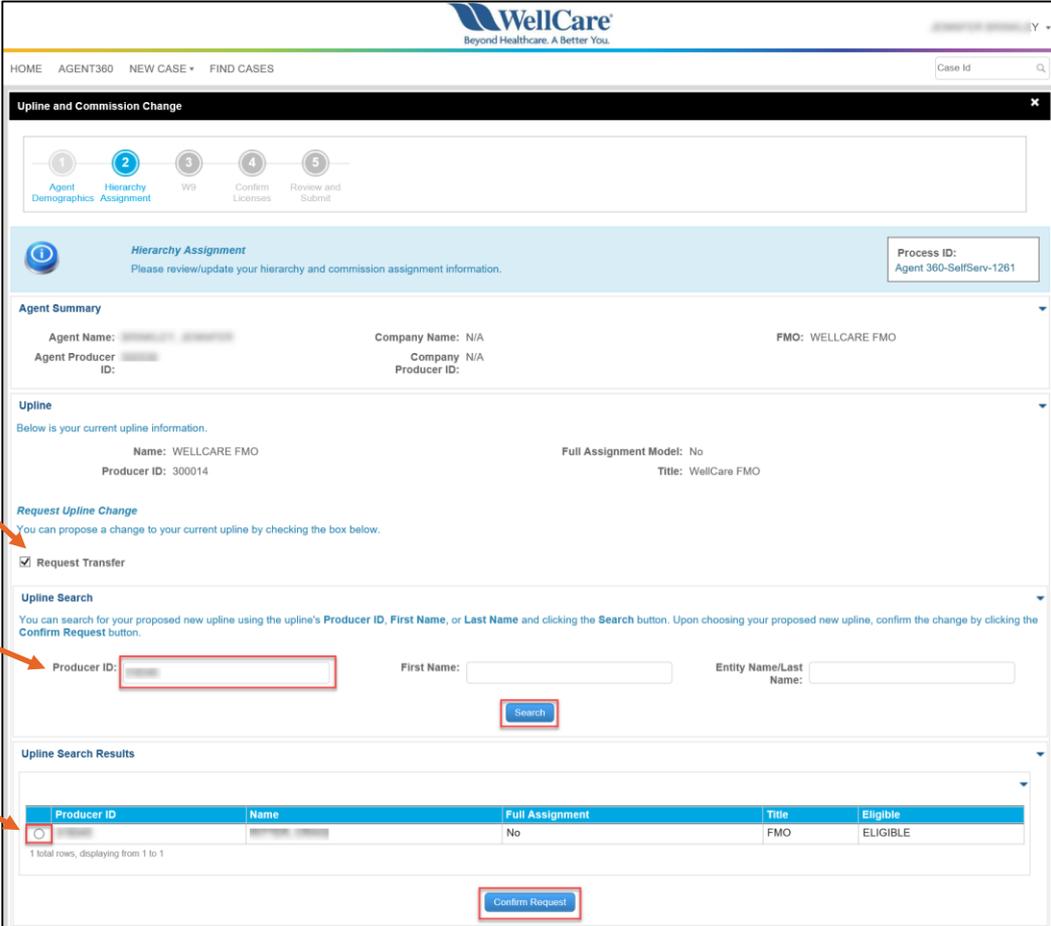
Hierarchy change process:

Step 1: Click *Request Transfer*

Step 2: Enter the PID, name or company name for the proposed hierarchy

Search

Step 3: Select the proposed hierarchy and *Confirm Request*.



WellCare
Beyond Healthcare. A Better You.

HOME AGENT360 NEW CASE FIND CASES

Upline and Commission Change

1 Agent Demographics 2 Hierarchy Assignment 3 W9 4 Confirm Licenses 5 Review and Submit

Hierarchy Assignment
Please review/update your hierarchy and commission assignment information. Process ID: Agent 360-SelfServ-1261

Agent Summary
Agent Name: [REDACTED] Company Name: N/A FMO: WELLCARE FMO
Agent Producer ID: [REDACTED] Company Producer ID: [REDACTED]

Upline
Below is your current upline information.
Name: WELLCARE FMO Full Assignment Model: No
Producer ID: 300014 Title: WellCare FMO

Request Upline Change
You can propose a change to your current upline by checking the box below.
 Request Transfer

Upline Search
You can search for your proposed new upline using the upline's Producer ID, First Name, or Last Name and clicking the Search button. Upon choosing your proposed new upline, confirm the change by clicking the Confirm Request button.

Producer ID: [REDACTED] First Name: [REDACTED] Entity Name/Last Name: [REDACTED]
Search

Upline Search Results

Producer ID	Name	Full Assignment	Title	Eligible
[REDACTED]	[REDACTED]	No	FMO	ELIGIBLE

1 total rows, displaying from 1 to 1

Confirm Request

Hierarchy Change/Assignment - Rejected

If change proposal is rejected, the agent who submitted the change will receive an email notification and the process ends here.



Dear [REDACTED],

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

New Hierarchy: [REDACTED]

Prior Hierarchy: WELLCARE 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

Hierarchy Change/Assignment - Complete

Once the request has been processed all parties involved will receive an email notification.



Dear [REDACTED],

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

New Hierarchy: [REDACTED]

Prior Hierarchy: WELLCARE 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

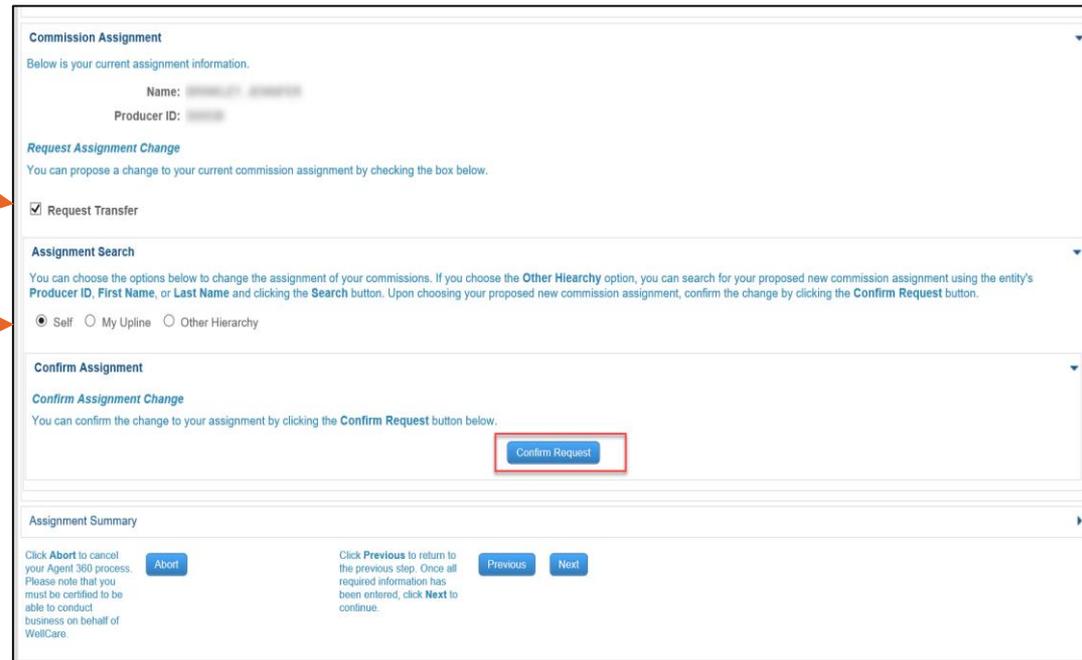
Commission Change/Assignment

Commission Assignment is the contracted agent who you elect to receive your commission check.

Step 1: Request Transfer

Step 2: choose on of the following:

- Self (to receive your own commissions)
- Hierarchy (your direct upline)
- Other Hierarchy (another hierarchy within your hierarchy's downline)



The screenshot shows a web form titled "Commission Assignment". It contains several sections: "Request Assignment Change" with a checked "Request Transfer" checkbox; "Assignment Search" with radio buttons for "Self", "My Upline", and "Other Hierarchy"; and "Confirm Assignment" with a "Confirm Request" button highlighted by a red box. At the bottom, there is an "Assignment Summary" section with "Abort", "Previous", and "Next" buttons.

Confirm Request

Commission Assignment – Complete

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



Dear [REDACTED],

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

New/Current Commissions Assignment : [REDACTED]

Prior Commissions Assignment : [REDACTED]

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

Section 3 Required Forms & Acknowledgement

- W9
- Tax Classification
- Acknowledgement



Section 3: W9

If you elected to update your name or shipping address in section 1, this is where you will sign a new W9.

If there are changes to your Tax Classification, update here.

Check the box to acknowledge and agree to the terms.

Sign the W9.

Select *Next* to continue.



Section 4 Licensing

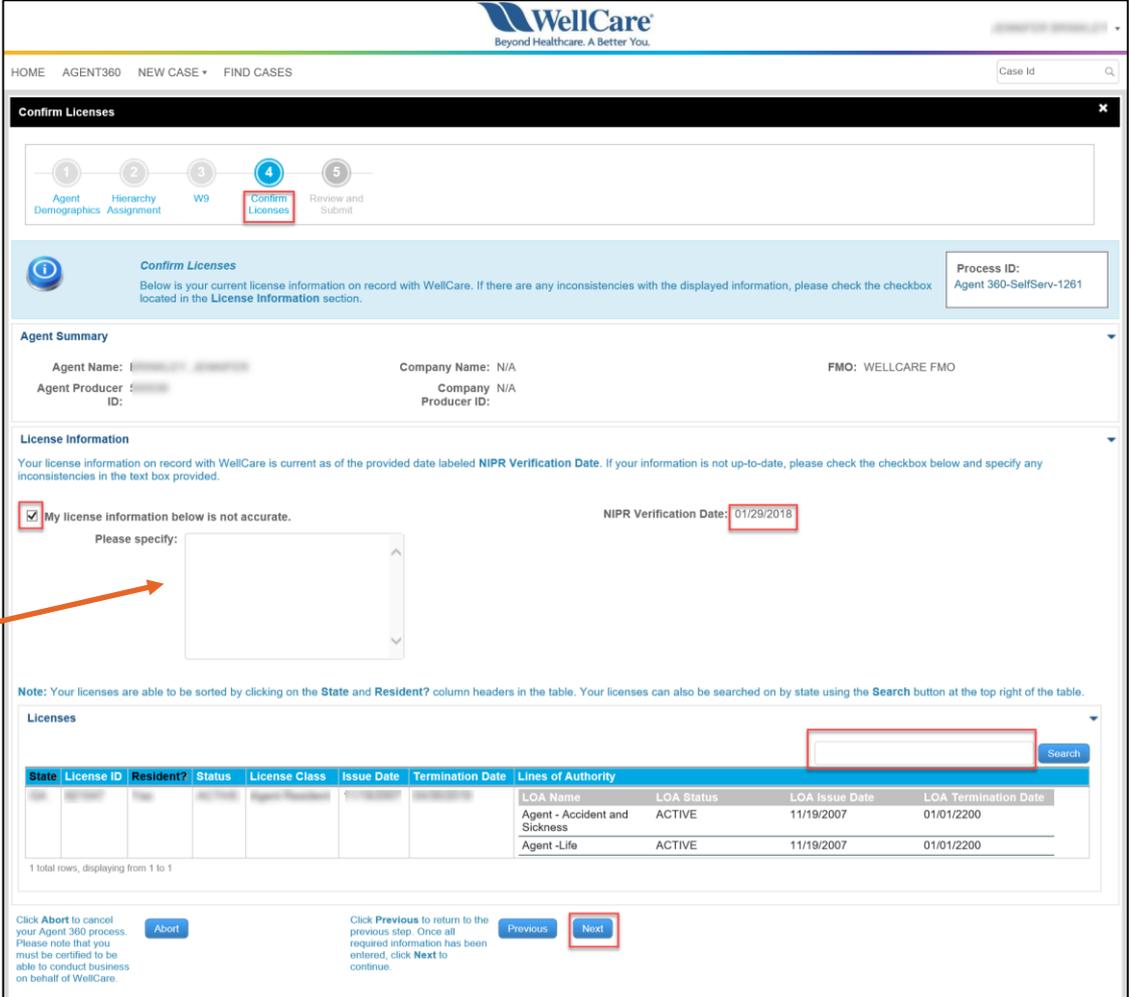


If the license information shown is incorrect or if information needs to be updated, complete the following steps:

Step 1: Check the license information box

Step 2: Provide a reason

Click *Next*



WellCare
Beyond Healthcare. A Better You.

HOME AGENT360 NEW CASE ▾ FIND CASES Case Id

Confirm Licenses

1 Agent Demographics 2 Hierarchy Assignment 3 W9 4 **Confirm Licenses** 5 Review and Submit

Confirm Licenses
Below is your current license information on record with WellCare. If there are any inconsistencies with the displayed information, please check the checkbox located in the **License Information** section.

Process ID: Agent 360-SelfServ-1261

Agent Summary

Agent Name: [REDACTED] Company Name: N/A FMO: WELLCARE FMO
Agent Producer ID: [REDACTED] Company N/A Producer ID: [REDACTED]

License Information
Your license information on record with WellCare is current as of the provided date labeled **NIPR Verification Date**. If your information is not up-to-date, please check the checkbox below and specify any inconsistencies in the text box provided.

My license information below is not accurate. NIPR Verification Date: 01/29/2018
Please specify:

Note: Your licenses are able to be sorted by clicking on the **State** and **Resident?** column headers in the table. Your licenses can also be searched on by state using the **Search** button at the top right of the table.

Licenses

State	License ID	Resident?	Status	License Class	Issue Date	Termination Date	Lines of Authority
							LOA Name LOA Status LOA Issue Date LOA Termination Date Agent - Accident and Sickness ACTIVE 11/19/2007 01/01/2200 Agent -Life ACTIVE 11/19/2007 01/01/2200

1 total rows, displaying from 1 to 1

Click **Abort** to cancel your Agent 360 process. Please note that you must be certified to be able to conduct business on behalf of WellCare.

Click **Previous** to return to the previous step. Once all required information has been entered, click **Next** to continue.

Use the Search field to filter on individual licenses.

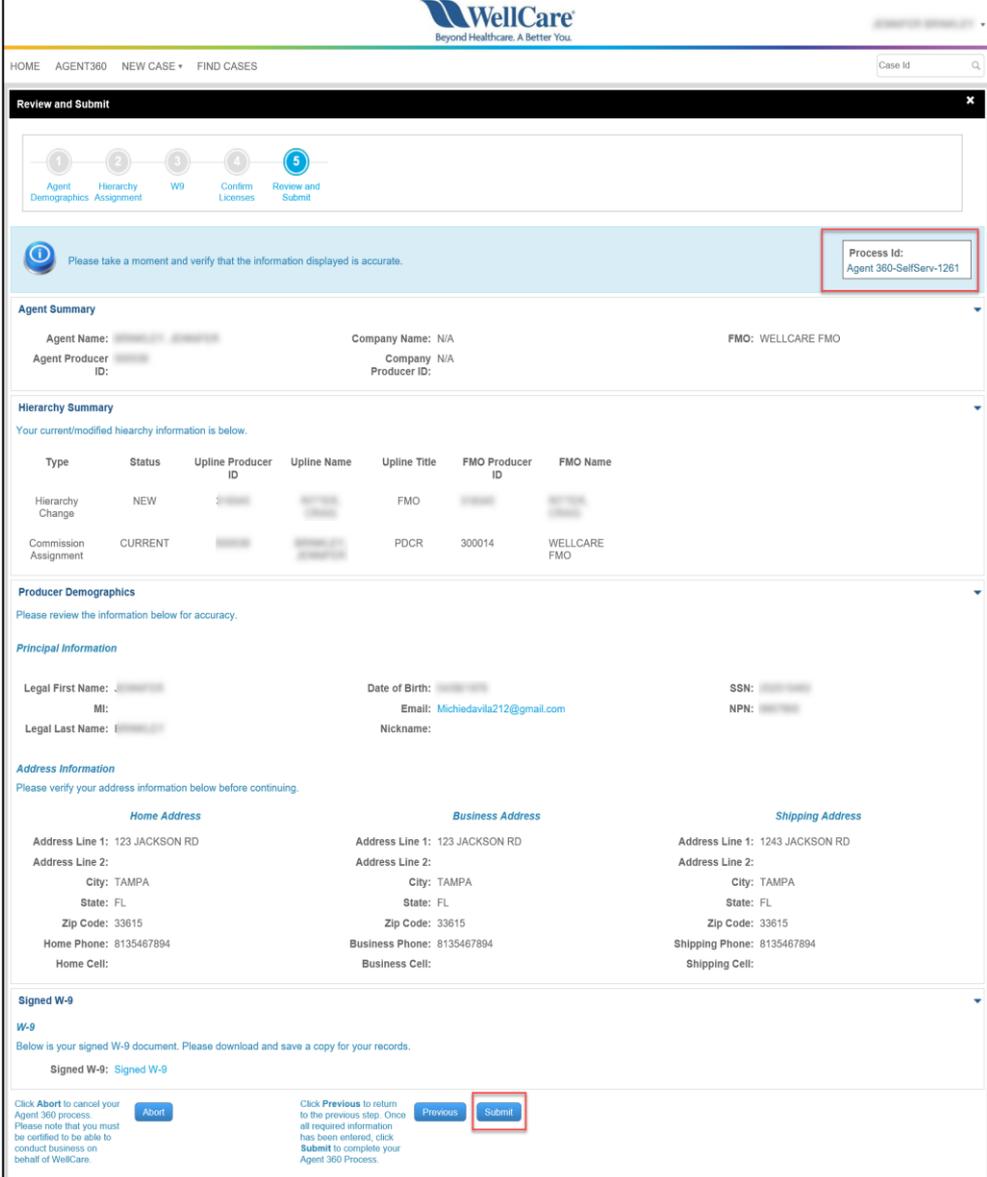
Review & Submit Changes



Review and Submit

Review all changes made in sections 1-4 to ensure new information is correct.

Click *Submit* and *Yes* to confirm.



WellCare
Beyond Healthcare. A Better You.

HOME AGENT360 NEW CASE FIND CASES Case Id

Review and Submit

1 Agent Demographics 2 Hierarchy Assignment 3 W9 4 Confirm Licenses 5 Review and Submit

Please take a moment and verify that the information displayed is accurate. Process Id: Agent 360-SelfServ-1261

Agent Summary

Agent Name: [REDACTED] Company Name: N/A FMO: WELLCARE FMO
Agent Producer ID: [REDACTED] Company Producer ID: N/A

Hierarchy Summary

Your current/modified hierarchy information is below.

Type	Status	Upline Producer ID	Upline Name	Upline Title	FMO Producer ID	FMO Name
Hierarchy Change	NEW	[REDACTED]	[REDACTED]	FMO	[REDACTED]	[REDACTED]
Commission Assignment	CURRENT	[REDACTED]	[REDACTED]	PDCR	300014	WELLCARE FMO

Producer Demographics

Please review the information below for accuracy.

Principal Information

Legal First Name: [REDACTED] Date of Birth: [REDACTED] SSN: [REDACTED]
MI: [REDACTED] Email: Michiedavila212@gmail.com NPN: [REDACTED]
Legal Last Name: [REDACTED] Nickname:

Address Information

Please verify your address information below before continuing.

Home Address	Business Address	Shipping Address
Address Line 1: 123 JACKSON RD Address Line 2: City: TAMPA State: FL Zip Code: 33615 Home Phone: 8135467894 Home Cell:	Address Line 1: 123 JACKSON RD Address Line 2: City: TAMPA State: FL Zip Code: 33615 Business Phone: 8135467894 Business Cell:	Address Line 1: 1243 JACKSON RD Address Line 2: City: TAMPA State: FL Zip Code: 33615 Shipping Phone: 8135467894 Shipping Cell:

Signed W-9

W-9
Below is your signed W-9 document. Please download and save a copy for your records.
Signed W-9: Signed W-9

Click **Abort** to cancel your Agent 360 process. Please note that you must be certified to be able to conduct business on behalf of WellCare. **Abort**

Click **Previous** to return to the previous step. Once all required information has been entered, click **Submit** to complete your Agent 360 Process. **Previous** **Submit**



Beyond Healthcare. A Better You.

