



## Completing the eContract Guide

February 5, 2018

# Invite to Onboard

Agents will receive an invitation to contract with WellCare.

Clicking the hyper link in the invitation will direct to the onboarding site.



Dear TEST ONE,

You are invited to complete a contract with WellCare Health Plans, Inc. Please click the link below to access your eContract:

<https://uat.webcomserver.com/wpm/mt/comprehensive/projects/onbd/pob-1406>

Your user credentials:

USERNAME: [fmotesting@gmail.com](mailto:fmotesting@gmail.com) PASSWORD: WellCare1

**Note:** All mandatory fields must be completed prior to submission.

Contracts can take up to 24 hours from submission to process. Please contact your local [District Sales Manager](#) or call Producer Services at [866-822-1339](tel:866-822-1339).

Thank you for your interest in WellCare!

Regards,

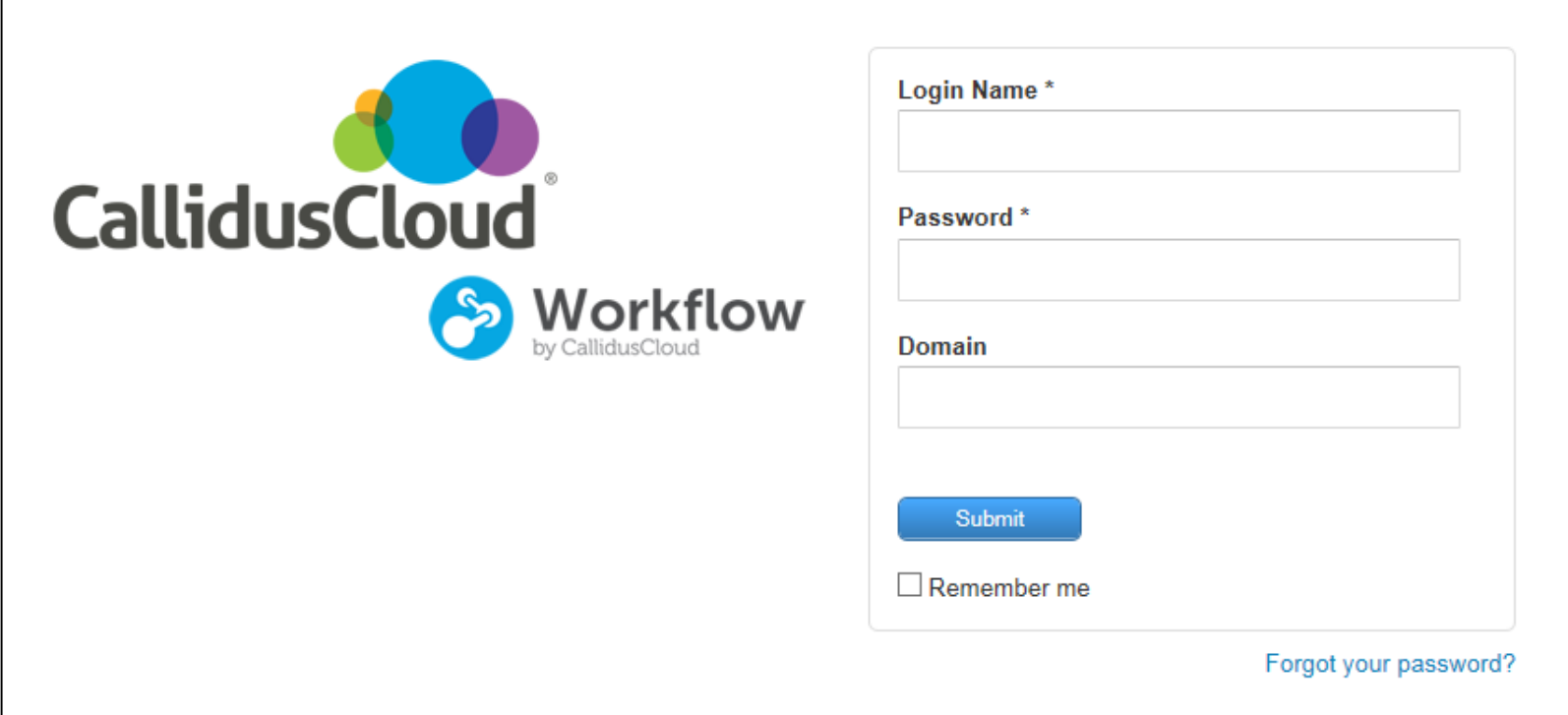
WellCare Sales Support

# Onboarding – Setting Permanent Password

Agents can begin the onboarding process at this point.

At the login page, enter the username and temporary password that was provided.

For *Domain*, type in comprehensive (this only needs to be entered at first time-login).



The image shows a login form for CallidusCloud Workflow. On the left is the logo for CallidusCloud, which consists of four overlapping circles in blue, green, orange, and purple, with the text "CallidusCloud" below it. Below that is the "Workflow by CallidusCloud" logo, which features a blue circle with a white icon of two hands shaking, followed by the text "Workflow by CallidusCloud". On the right is a login form with three input fields: "Login Name \*", "Password \*", and "Domain". Below the "Domain" field is a blue "Submit" button. Below the "Submit" button is a checkbox labeled "Remember me". At the bottom right of the form is a link that says "Forgot your password?".

# Onboarding – Setting Permanent Password

**Step 1:** Complete the asterisked fields and click *Change Password*.



The screenshot shows the WellCare user interface for setting a permanent password. At the top, the WellCare logo and tagline "Beyond Healthcare. A Better You." are displayed. Below this is a light blue information box containing a list of password requirements. The form includes two input fields: "New Password \*" and "Confirm Password \*". At the bottom, there are two buttons: "Change Password" and "Log Off".

  
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](#)

# Accessing the eContract

**Step 2:** Once logged in, *Open cases assigned to me* will include the contract package that was sent. Click the link to get started.



The screenshot displays the WellCare Agent360 interface. At the top, the WellCare logo and tagline 'Beyond Healthcare. A Better You.' are visible, along with a 'TEST ONE' dropdown menu. The navigation bar includes 'HOME', 'AGENT360', 'NEW CASE', and 'FIND CASES', with a search box for 'Case Id'. The main content area is titled 'Open cases assigned to me' and features a table with the following columns: Case Key, Case Name, Created On, Status, and Updated. A single case is listed: 'Agent Onboarding-ONBD-1406' with a creation date of '02/03/2018 11:20:01' and a status of 'Agent Validation'. Below the table, there are links for 'Open cases I created', 'All open cases', 'Unassigned open cases', and 'Cases I Follow'. An orange arrow points to the 'Agent Onboarding-ONBD-1406' case key.

Case Key	Case Name	Created On	Status	Updated
<a href="#">Agent Onboarding-ONBD-1406</a>		02/03/2018 11:20:01	Agent Validation	02/03/2018 11:20:11

# Completing the eContract

**Step 3:** Enter your SSN and click *Validate NPN*.  
Your information will generate under *Agent Result*.

Please enter your **SSN** and **Last Name** below in order to retrieve your National Producer Number (NPN) from the National Insurance Producer Registry (NIPR). Optionally, if you are onboarding with a company enter the company's **Tax ID**.

Are you contracting as a company?  Yes

First Name:

Last Name:

SSN:

Below is the information returned from the National Insurance Producer Registry (NIPR). Please verify this information before continuing.

**Agent Result**

Name	SSN/Tax ID	NPN
<input type="text"/>	<input type="text"/>	<input type="text"/>

1 total rows, displaying from 1 to 1

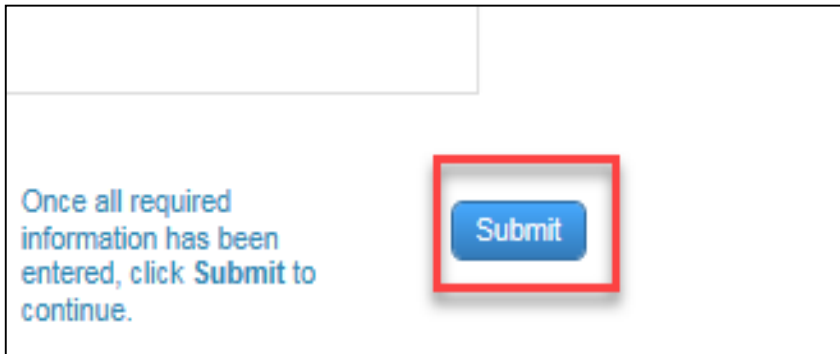
Click **Abort** to cancel your onboarding process. Please note that you must be certified to be able to conduct business on behalf of WellCare.

Once all required information has been entered, click **Submit** to continue.

**Note:** companies contracting with WellCare must select *Yes* under *Are you contracting as a company?*

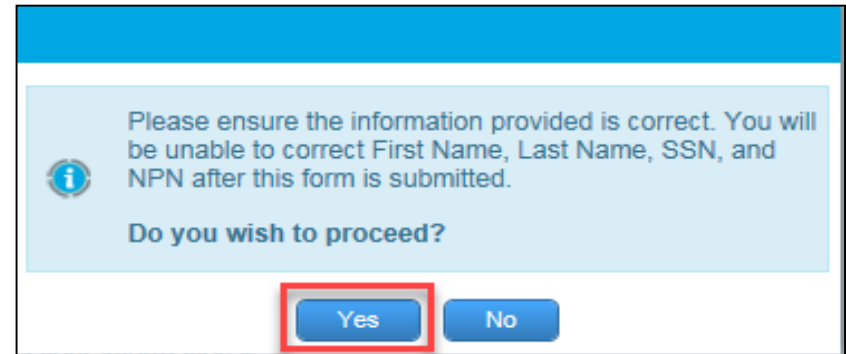
# Completing the eContract

**Step 4:** Click *Submit* and then *Yes* to proceed.



Once all required information has been entered, click **Submit** to continue.

**Submit**



Please ensure the information provided is correct. You will be unable to correct First Name, Last Name, SSN, and NPN after this form is submitted.

**Do you wish to proceed?**

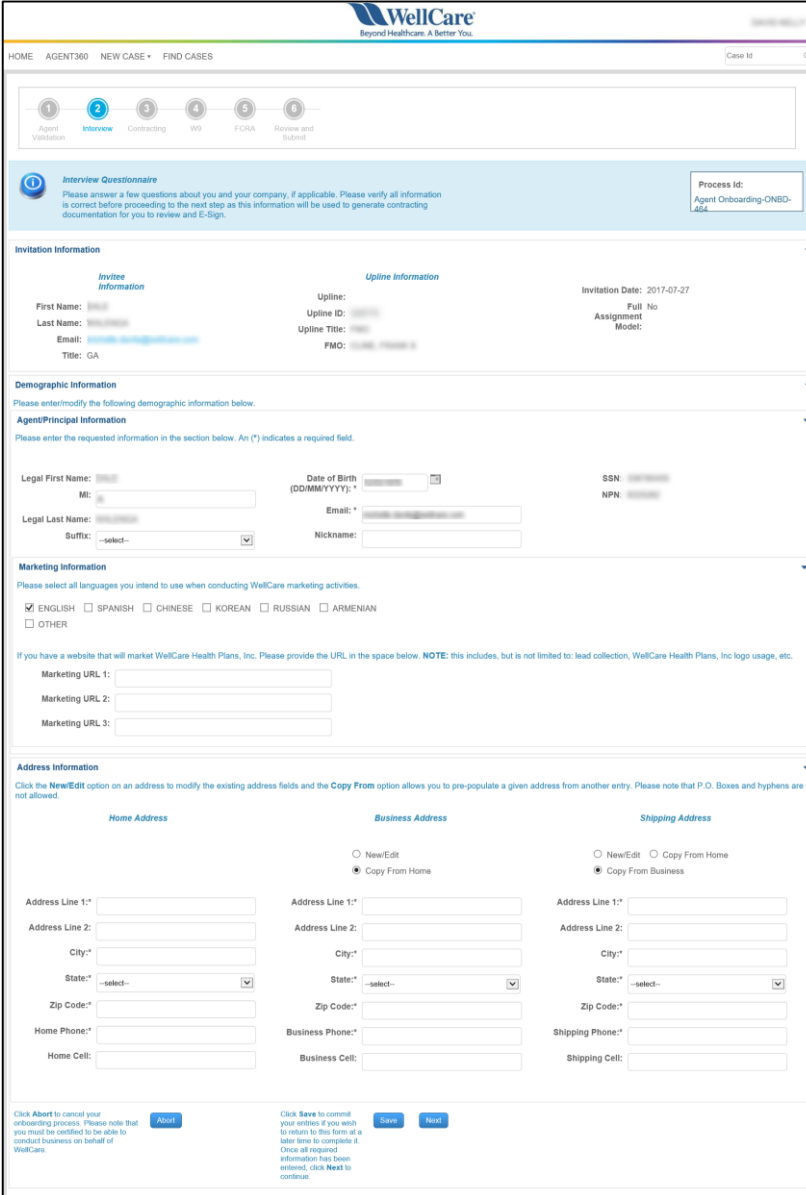
**Yes** **No**

# Completing the eContract

At this point you will be brought to section 2, the Interview page.

**Step 5:** Complete the required/asterisked fields within the agent interview that are not prepopulated.

- Principal/hierarchy information will be prepopulated with the hierarchy information associated with the contract invite
- Agents re-contracting with WellCare who formerly contracted with their company need to ensure the auto populated legal name of the company is accurate
- Phone number fields are numeric ONLY
- PO box will not be accepted in the address lines



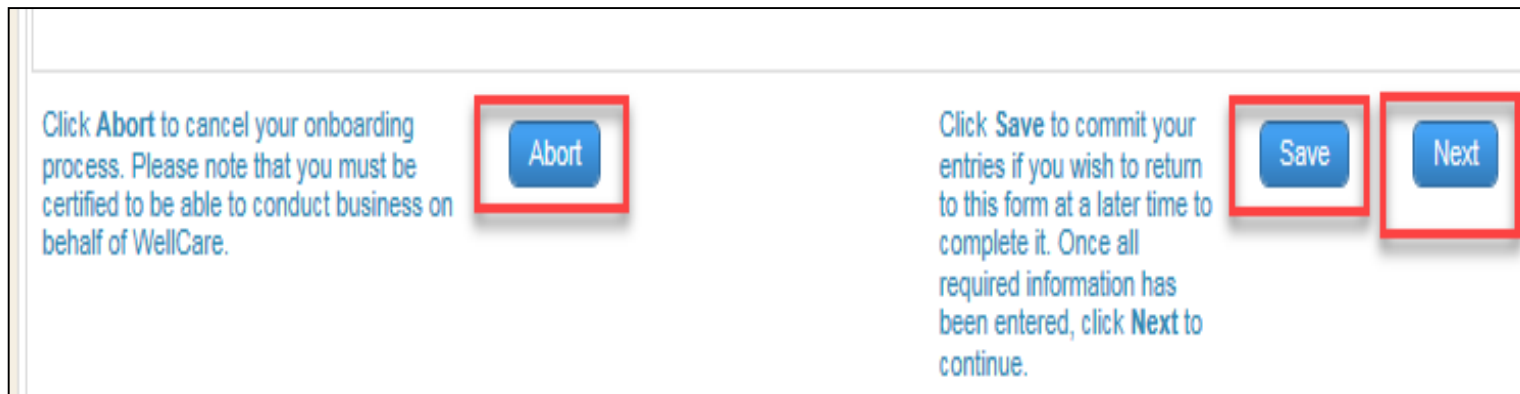
The screenshot shows the 'Interview Questionnaire' form in the WellCare system. The form is divided into several sections:

- Progress Bar:** Shows steps 1 through 5: Agent Validation, Interview (current), Contracting, W9, FICA, and Review and Submit.
- Interview Questionnaire:** Includes a 'Process ID: Agent Onboarding-ONBD-464' and instructions to answer questions about the user and company.
- Invitation Information:** Fields for Invitee Information (First Name, Last Name, Email, Title) and Upline Information (Upline, Upline ID, Upline Title, FMO). Invitation Date is 2017-07-27.
- Demographic Information:** Fields for Legal First Name, MI, Legal Last Name, Suffix, Date of Birth (DD/MM/YYYY), SSN, NPN, and Nickname.
- Marketing Information:** Checkboxes for languages: ENGLISH (checked), SPANISH, CHINESE, KOREAN, RUSSIAN, ARMENIAN, and OTHER. Includes a field for Marketing URL.
- Address Information:** Three columns for Home Address, Business Address, and Shipping Address. Each column has fields for Address Line 1, Address Line 2, City, State, and Zip Code. Radio buttons allow for 'New/Edit' or 'Copy From Home/Business'.
- Buttons:** 'Abort' and 'Save' buttons are visible at the bottom.



# Completing the eContract

**Step 6:** Click *Next* to continue.



The screenshot shows a horizontal panel with three main sections. On the left, there is a blue button labeled 'Abort' enclosed in a red square. To its left is the text: 'Click **Abort** to cancel your onboarding process. Please note that you must be certified to be able to conduct business on behalf of WellCare.' In the center, there is a blue button labeled 'Save' enclosed in a red square. To its right is the text: '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.' On the far right, there is a blue button labeled 'Next' enclosed in a red square.

Remember to save as you complete the contract to avoid losing information.  
**WARNING!** Clicking *Abort* will void the eContract.

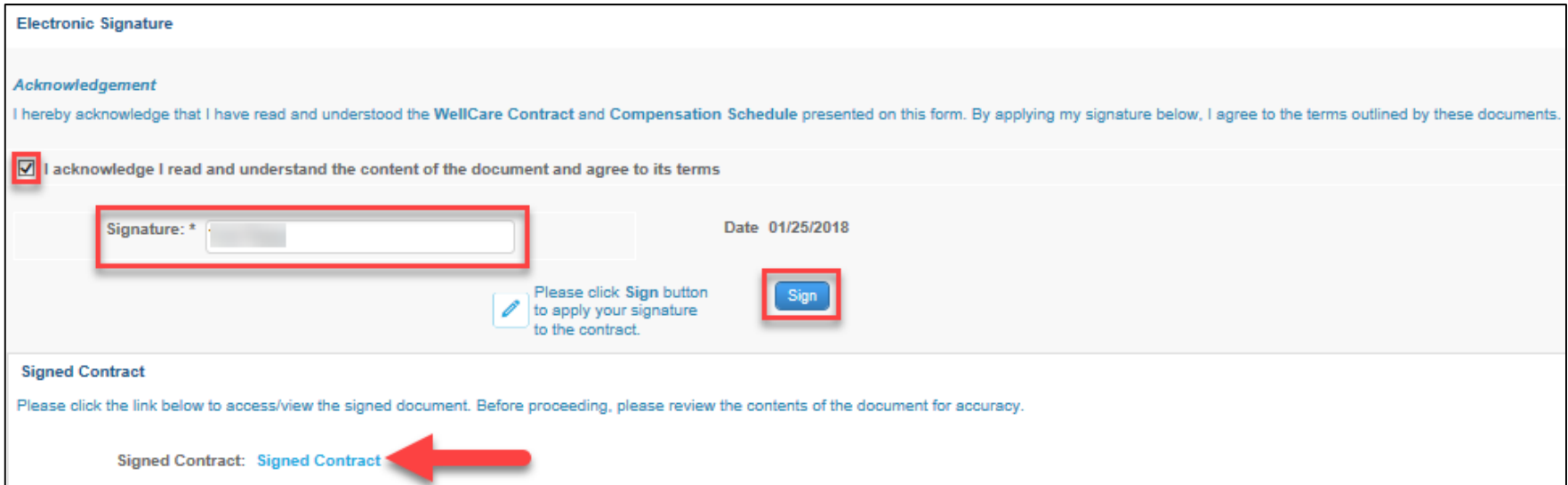
**Helpful Tip!** You can select *Previous* or *Next* at any time throughout the contracting process.

# Signing the eContract

Section 3 provides PDF copies of the contract and compensation agreement.

**Step 7:** After reviewing the agreements, check the acknowledgement box to agree to the terms of the contract, and enter your name in the *Signature* field.

**Note:** Once you have completed your signature, a link to view and download your signed contract will appear.



**Electronic Signature**


**Acknowledgement**

I hereby acknowledge that I have read and understood the WellCare Contract and Compensation Schedule presented on this form. By applying my signature below, I agree to the terms outlined by these documents.

I acknowledge I read and understand the content of the document and agree to its terms

Signature: \*

Date 01/25/2018

 Please click Sign button to apply your signature to the contract.

**Signed Contract**

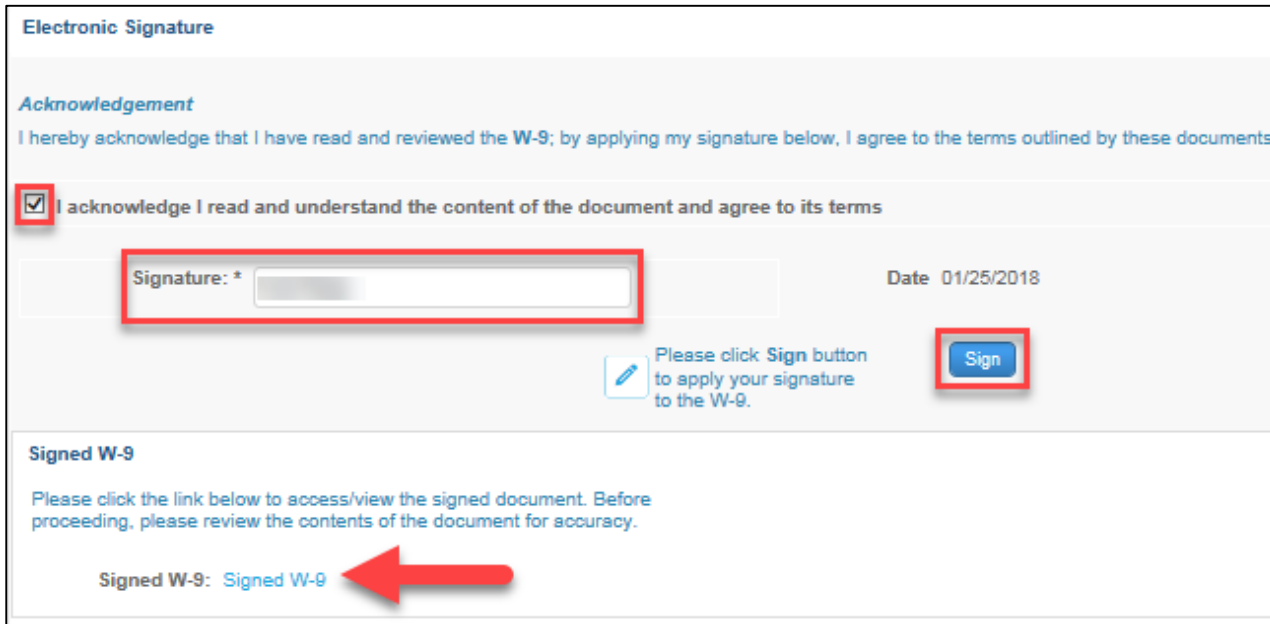
Please click the link below to access/view the signed document. Before proceeding, please review the contents of the document for accuracy.

Signed Contract: [Signed Contract](#)

# Signing the W9

Section 4 provides a prepopulated copy of the W9.

**Step 8:** After reviewing the document, check the acknowledgement box to confirm all information in the W9 is correct and enter your name in the *Signature* field. **Note:** once you have completed your signature, a link to view and download your signed W9 will appear.



The screenshot shows the 'Electronic Signature' section of a W9 form. It includes an 'Acknowledgement' section with a checked checkbox and the text 'I hereby acknowledge that I have read and reviewed the W-9; by applying my signature below, I agree to the terms outlined by these documents.' Below this is a 'Signature: \*' field with a red box around it, and a 'Date' field showing '01/25/2018'. A 'Sign' button is also highlighted with a red box. A red arrow points to a link labeled 'Signed W-9' in the 'Signed W-9' section.

**Note:** if future changes are made to your last name or shipping address, a new W9 form will need to be completed and submitted.

# Signing the FCRA

Section 5 provides an overview of the FCRA.

**Step 10:** Click the *Fair Credit Reporting Act* (FCRA) link to review a summary of your rights under the act.

You can request a copy of your background check by checking the box next to *Request Copy of Background Check*.

FCRA

[Review FCRA](#)

Please click the link below to open and view the FCRA. Please carefully review the content of the document prior to signing it.

FCRA: [FCRA](#)

# Signing the FCRA


**Step 11:** Check the acknowledgement box agreeing to the terms of the FCRA and enter your name in the *Signature* field. **Note:** once you have completed your signature, a link to view and download your signed FCRA acknowledgement will appear.

### Electronic Signature

**Acknowledgement**  
I hereby acknowledge that I have read and understood the FCRA Document. By applying my signature below, I agree to terms outlined by this document.


I acknowledge I read and understand the content of the document and agree to its terms

Signature: \*  Date 01/25/2018

 Please click Sign button to apply your signature to the FCRA.

### Signed FCRA

Please click the link below to access/view the signed document. Before proceeding, please review the contents of the document for accuracy.

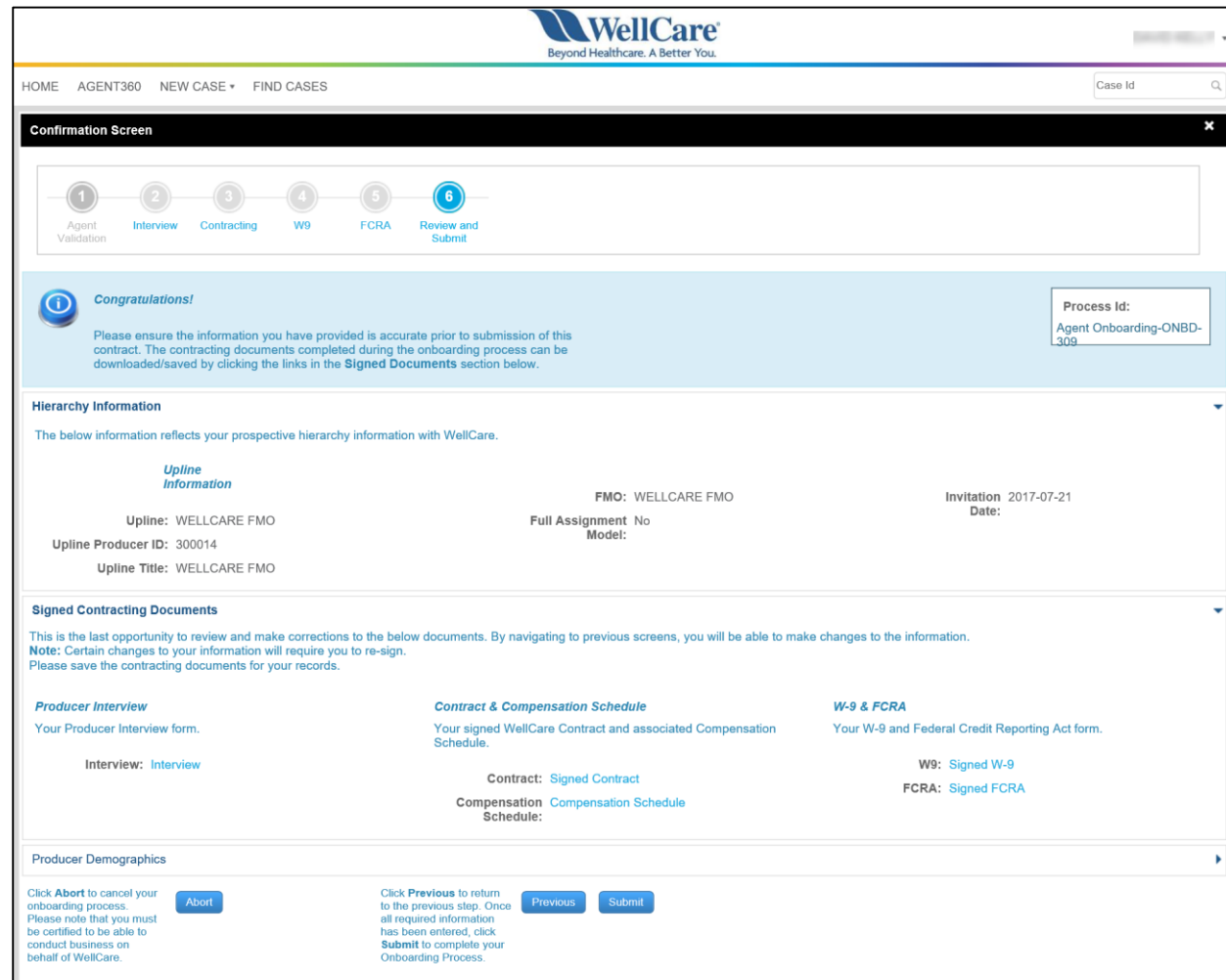
Signed FCRA: [Signed FCRA](#) 

# Signing/Submitting your eContract

Section 6, the Review and Submit page is the last section of the contract. Ensure all information is accurate!

**Step 11:** Click *Submit* and then *Yes* to confirm.

Within 24 hours, agents will receive an email from WellCare University providing them with access information and instructions to complete training requirements.



The screenshot displays the 'Confirmation Screen' of the WellCare onboarding process. At the top, the WellCare logo and tagline 'Beyond Healthcare. A Better You.' are visible. Below the logo is a navigation bar with links for 'HOME', 'AGENT360', 'NEW CASE', and 'FIND CASES'. A search box for 'Case Id' is located on the right. The main content area features a progress indicator with six steps: 1. Agent Validation, 2. Interview, 3. Contracting, 4. W9, 5. FCRA, and 6. Review and Submit. Step 6 is currently active. Below the progress indicator is a 'Congratulations!' message with an information icon and a 'Process Id: Agent Onboarding-ONBD-309' box. The 'Hierarchy Information' section provides details about the agent's prospective hierarchy, including 'Upline Information' (Upline: WELLCARE FMO, Upline Producer ID: 300014, Upline Title: WELLCARE FMO), 'FMO: WELLCARE FMO', 'Full Assignment No Model:', and 'Invitation Date: 2017-07-21'. The 'Signed Contracting Documents' section lists three documents: 'Producer Interview' (Interview: Interview), 'Contract & Compensation Schedule' (Contract: Signed Contract, Compensation Schedule: Compensation Schedule), and 'W-9 & FCRA' (W9: Signed W-9, FCRA: Signed FCRA). At the bottom, there are instructions for clicking 'Abort' to cancel the process and 'Previous' to return to the previous step, along with 'Submit' buttons.



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