



CENTENE  
**Workbench**




# Centene Workbench: Level 01

Portal Overview

# Introduction

This document reviews the Level 01 Portal of Centene Workbench. The processes covered are a breakdown of the portal functions, self-service Workflows, and ticketing system within the portal.

## Icon Use

Icon	Function
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# Table of Contents

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My Hierarchy Info

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# Dashboard

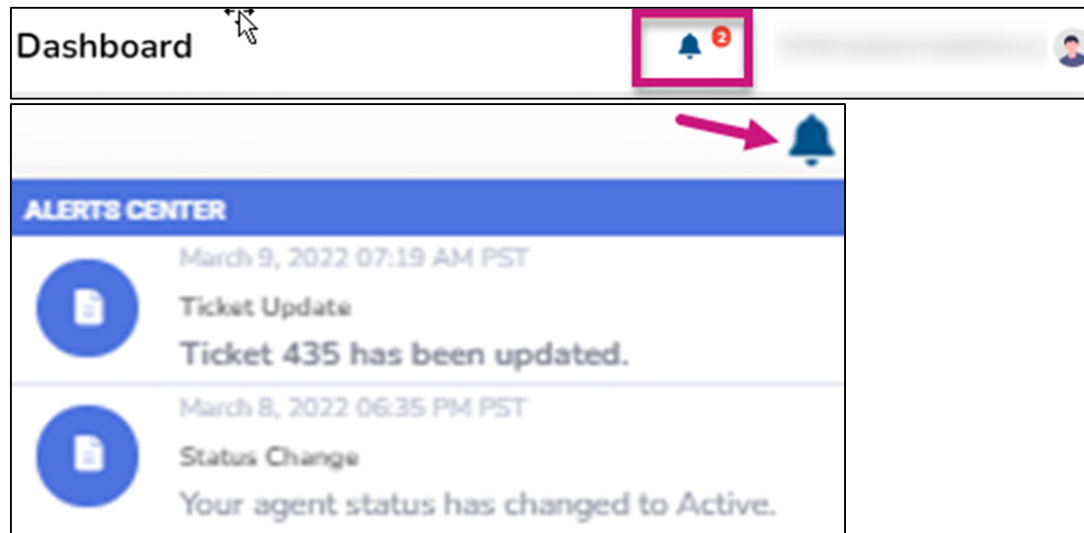
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# Dashboard

## Alerts

- To View a new alert or notification, refer to the red number next to the bell at the top of the Dashboard
- To see the notification, select the bell
- New unread notifications will be bolded
- To see more information, select the alert



# Dashboard

## Widgets

The Dashboard displays several widgets to help manage your business, status, and credentials.

### 1. My Credentials

Provides a summary of your status and state licenses

My Credentials	
Broker Status	Active/Certified
State Licenses	48 Active   2 Inactive
<a href="#">View Details</a>	

### 2. Commission Statement History

Provides a summary of recent commissions statement

Commission Statement History		
Statement Date	Statement Description	Total Commission
01/01/2022	2022 Jan External commission	\$
<a href="#">View Details</a>		

**Note:** To see more information, select [View Details](#).



# Dashboard

## Widgets

The Dashboard displays several widgets to help manage your business, status, and credentials.

### 3. New Application Status

Provides a summary of recently submitted applications

New Application Status				
App Date	Eff Date	Member Name	Plan	Status
<a href="#">View Details</a>				

### 4. Quick Links

Provides a quick access to the most commonly used links

Quick Links	
Link	Description
<a href="#">Ascend Enrollment Platform</a>	Enrollment Platform
<a href="#">Provider Lookup</a>	Find a Provider Tool
<a href="#">Centene Learning Center</a>	Training Platform
<a href="#">More Links</a>	

**Note:** To see more information, select [View Details](#).



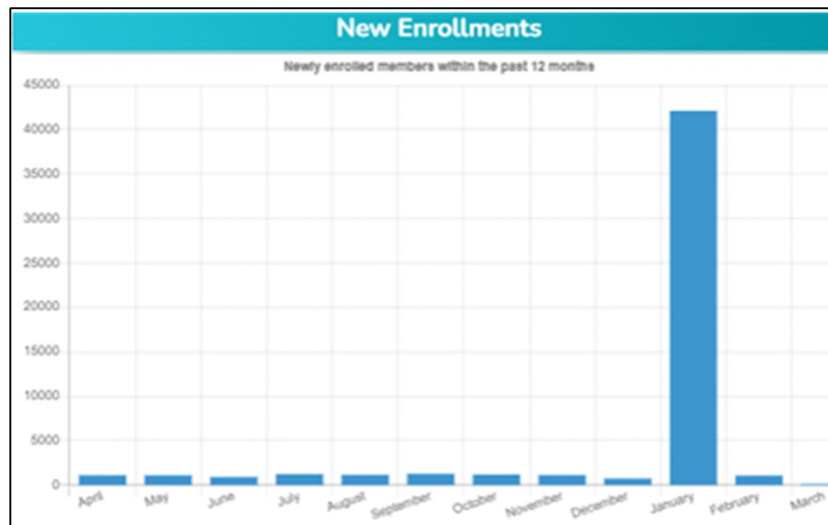
# Dashboard

## Widgets

The Dashboard displays several widgets to help manage your business, status, and credentials.

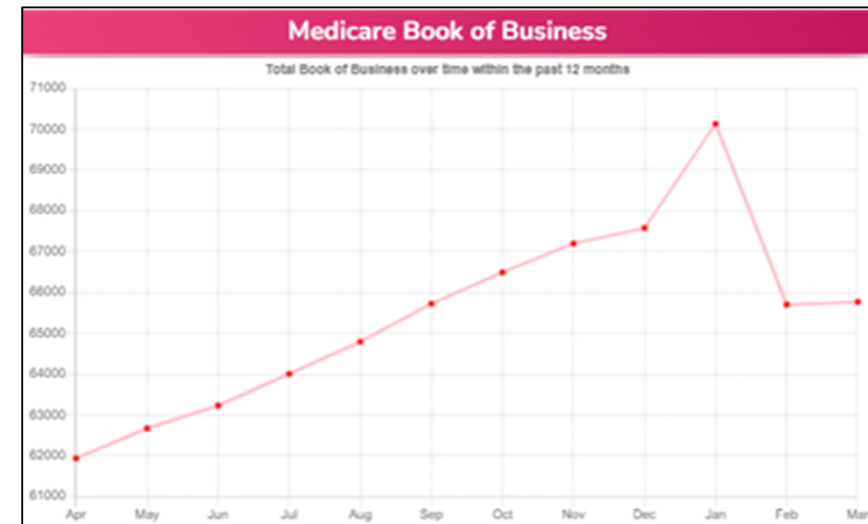
### 5. New Enrollments

Provides a summary of newly enrolled members over a 12-month period



### 6. Medicare Book of Business

Provides a summary of the total book of business over a 12-month period







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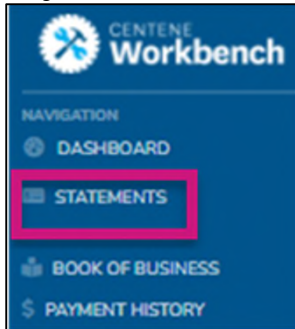
# Statements

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# Statements

If you are either Direct or Downline Only, you will receive statement information in your portal



- Once a statement is published, a new row with all details pertaining to that specific payment will display
- To view the entire statement, select the blue **Excel** button
  - The statement extract will then download
- Once a statement has been sent to AP and paid, the following columns will update and populate:
  - Payment Type
  - Payment Date
  - Payment ID

	Statement Number	Statement Date	Credits	Debits	Balance	Amount	Payment Type	Payment Date	Payment ID
Excel		01/01/2022					ACH		





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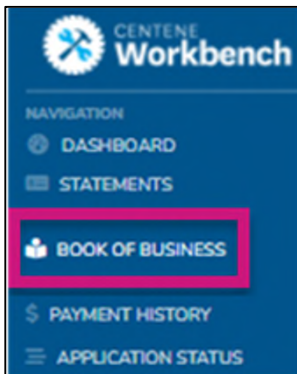
# Book of Business

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# Book of Business

The Book of Business tab will display all members where you are the broker of record.



- Enter one of the below filters to look for a specific member, or members who fall under specific categories
  - Once the search criteria is entered, select **Search** to generate the results
- At any time, select **Download** to export your Book of Business into Excel

**Note:** The Book of Business download provides additional information about your members.

First Name	Last Name	Member MBI	Active Member	Broker NPN
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text" value="--"/>	<input type="text" value="--"/>
Effective From	Effective To	Termination From	Termination To	
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	
<input type="button" value="SEARCH"/>		<input type="button" value="DOWNLOAD"/>		



# Book of Business

- Once you select the **Search** button, the member information pertaining to the search criteria will display
- From here, navigate through the list of members, or download to a CSV file for additional member information
- Also use the open text **Search** field to search for a member

Member MBI	First Name	Last Name	Phone	Effective Date	Termination Date	Contract	Plan	Mem Year	Broker NPN	Broker Name
	ALBERT			01/01/2019		S4802	145	4		
	HARRY			01/01/2022		H5199	008	1		





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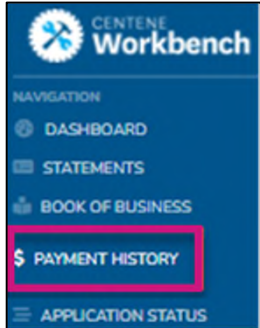
# Payment History

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# Payment History

Payment History is a tool to assist with validating commission payments for specific members over a period of time.



- Enter the specified date range and the Member MBI and select **Search**
- All Payments that were issued pertaining to that Member during the specified date range will generate
- Then Download to CSV

A screenshot of the Payment History search form. The form has a title "Payment History" and a user profile icon. Below the title are four input fields: "Statement Date From" (03/01/2022), "Statement Date To" (03/31/2022), "Member MBI" (empty), and "Broker NPN" (dropdown menu with "--"). A blue "SEARCH" button is located below the input fields.

Member MBI ↑↓	First Name ↑↓	Last Name ↑↓	Broker NPN ↑↓	Broker Name ↑↓	Statement Date ↑↓	Batch ID ↑↓	Statement Number ↑↓	Amount ↑↓	Payment Type ↑↓	Payment Date ↑↓	Payment ID ↑↓
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# Application Status

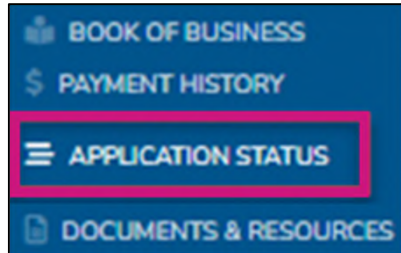
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# Application Status

Application Status allows tracking of all submitted applications where you are the BOR.



- Use any of the below search fields to narrow down your generated results
- Select **Search** to show all applications

<b>First Name</b>	<b>Last Name</b>	<b>Member MBI</b>	<b>Member Status</b>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text" value="--"/>
<b>App Date From</b>	<b>App Date To</b>	<b>Broker NPN</b>	
<input type="text"/>	<input type="text"/>	<input type="text"/>	
<input type="button" value="SEARCH"/>			



# Application Status, Cont.

- Once **Search** is selected all applications and information will display
- Download the results into a CSV file is available at this time

SEARCH    DOWNLOAD									
Search: _____									
App ID	Member MBI ↑↓	App Sign Date ↑↓	Effective Date ↑↓	First Name ↑↓	Last Name ↑↓	Status ↑↓	Reason ↑↓	Broker NPN ↑↓	Broker Name ↑↓
		02/07/2022	03/01/2022	DOLORES		Enrolled-Active			
		02/12/2022	03/01/2022	NATHANIEL		Future Enroll			





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# Documents & Resources

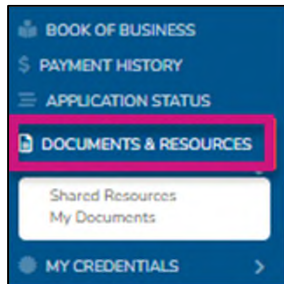
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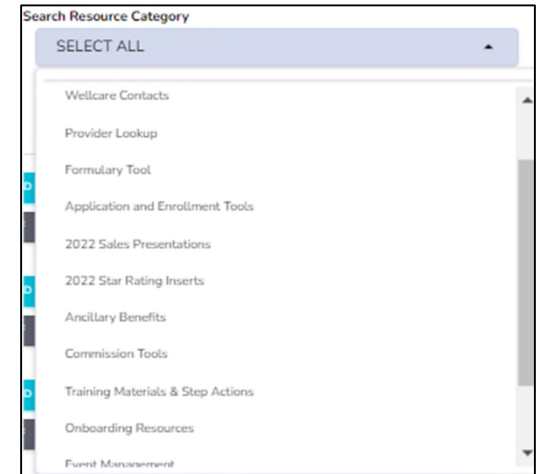
# Document Resources

## Shared Resources

The Shared Resources tab provides all broker related step action and resource documents.



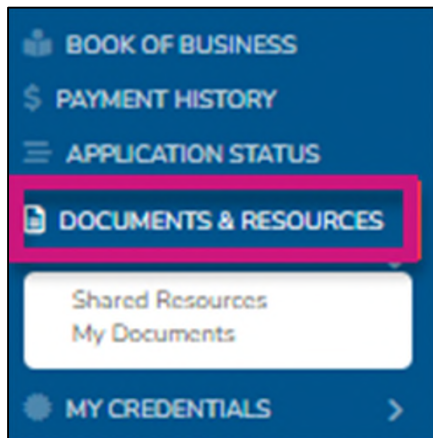
- Use the **Search Resource Category** option to look for specific document topics
- Use the open text Search field as an alternative
- If the resource is a PDF, view the document within the portal, or download it.



# Document Resources

## My Documents

The My Documents tab houses all documents that are specific to you and are only visible within your portal.



- Documents will include a copy of your Wellcare contract, W9s, any contract addendums that may be required in the future, etc.





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# My Credentials

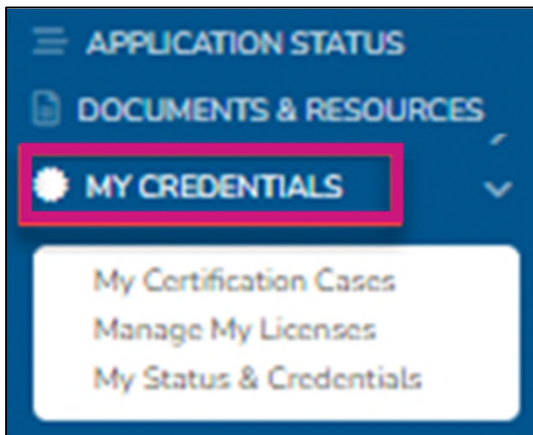
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# My Credentials

## My Certification Cases

The My Certification Cases tab allows you to review and track your onboarding history.



- Complete any annual recertification requirements.
  - Example: Contract changes to acknowledge

**Note:** If onboarding was through the old broker management system, no onboarding cases will be available at this time.



# My Credentials

## Manage My Licenses

- Active States displays which states you are currently approved to market/sell Wellcare plans
- Available States displays additional states that are available for you to add to your profile
  - After completing selecting a state (s), select the **Add Selected State** button to save your changes
  - Wellcare will then process any necessary appointments based on the state rules

The licenses shown in the "Active States" section below reflect states you are currently approved to market/sell Wellcare Medicare Advantage and/or Prescription Drug Plans. If you would like to activate any additional state licenses, please select from the options listed in the "Available States" section. After you are finished selecting state(s), make sure to click on "Add Selected State" to save your changes.

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**Active States**

<input checked="" type="checkbox"/> LA - Louisiana	<input checked="" type="checkbox"/> MS - Mississippi
<input checked="" type="checkbox"/> MO - Missouri	

---

**Available States**

<input type="checkbox"/> AR - Arkansas	<input type="checkbox"/> TX - Texas
--	-------------------------------------

**ADD SELECTED STATES**





# My Credentials

## My Status & Credentials

The My Status tab displays information regarding your Resident License, current agreement with Wellcare, training requirements, and overall status.

MY STATUS	LICENSE INFO	TRAINING INFO	CONTRACT INFO	APPOINTMENT INFO
Active Resident License	Active Contract	Active Training	Broker Status	
Yes	Yes	Yes	Active/Certified	

The License Info tab provides more details regarding the state licenses you have elected to market/sell Wellcare products.

State	Resident	License Number	License Class Name	LOA Name	Start Date	End Date	Status
NJ	Yes		Insurance Producer	Accident & Health or Sickness	07-15-1981	10-31-2022	Active
PA	No		NON RES PRODUCER INDIV	Accident & Health	06-05-2011	10-31-2023	Active

- Displays if the license is Resident or Non-Resident, the state of the license, the license number, the class and LOA name, the effective date and expiration dates, and the overall status of that license

**Note:** Once you have renewed a license with the State DOI, NIPR will automatically send the updated license information and it will reflect within your portal.



# My Credentials

## My Status & Credentials, Cont.

The Training Info tab displays AHIP and ACT history and status.

Training Year	Training Name	Start Date	End Date	Training Progress
2022	2022 Wellcare ACT Journey to a Successful Season - Broker	09/26/2021	09/30/2022	100.00

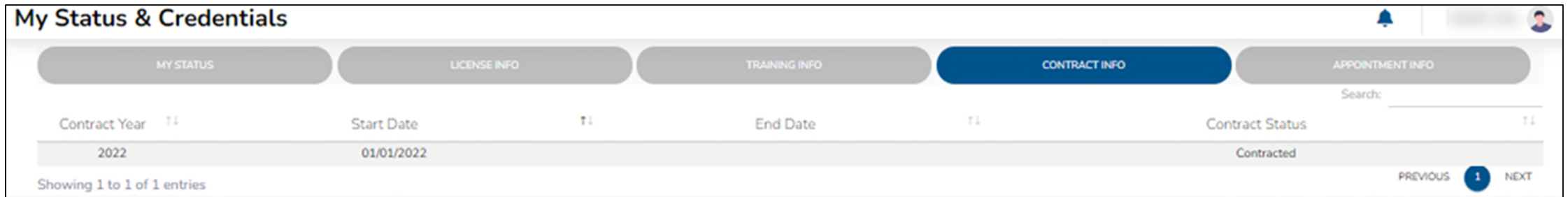
- Every year track progress through the Training Progress column.
- Training Progress Percent Breakdown:
  - 25% = AHIP Only Completed
  - 50% = AHIP + ACT Journey Completed
  - 75% = AHIP + ACT Journey & Product Completed
  - 100% = AHIP + ACT Journey & Product + ACT Exam (Passed)



# My Credentials

## My Status & Credentials, Cont.

The Contract Info tab provides details regarding contract status with Wellcare.



The screenshot shows a user interface for 'My Status & Credentials'. At the top, there are five tabs: 'MY STATUS', 'LICENSE INFO', 'TRAINING INFO', 'CONTRACT INFO' (which is highlighted in blue), and 'APPOINTMENT INFO'. Below the tabs is a search bar labeled 'Search:'. Underneath is a table with the following columns: 'Contract Year', 'Start Date', 'End Date', and 'Contract Status'. The table contains one row with the values: '2022', '01/01/2022', and 'Contracted'. The 'End Date' column is currently blank. At the bottom left of the table area, it says 'Showing 1 to 1 of 1 entries'. At the bottom right, there are navigation buttons: 'PREVIOUS', a blue circle with the number '1', and 'NEXT'.

Contract Year	Start Date	End Date	Contract Status
2022	01/01/2022		Contracted

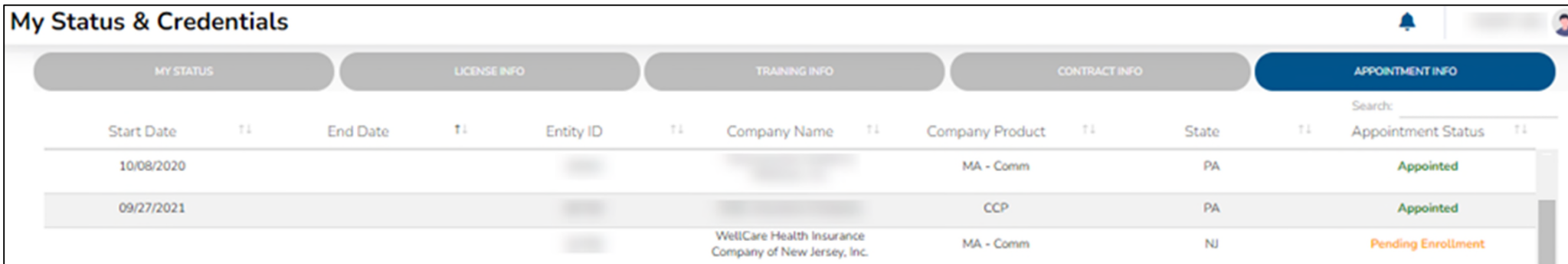
- The End Date will remain blank as long as the contract remains valid
- When there is a required contract addendum to acknowledge, a new line with the updated contract year and start date will display
  - The previous contract will be updated with an End Date



# My Credentials

## My Status & Credentials, Cont.

The Appointment Info tab provides details regarding Appointments with Wellcare and each state.



Start Date	End Date	Entity ID	Company Name	Company Product	State	Appointment Status
10/08/2020				MA - Comm	PA	Appointed
09/27/2021				CCP	PA	Appointed
			WellCare Health Insurance Company of New Jersey, Inc.	MA - Comm	NJ	Pending Enrollment

- Track the status of each appointment by using the Appointment Status column
  - Appointed = Appointed with Wellcare in that state.
  - Pending Enrollment = This state has a JIT (Just In Time) appointment rule. Wellcare will appoint the broker once an application is written in that state.
  - Ready for Appointment = the appointment has been added to the queue for processing.
  - None = the state is a non-appoint state, no appointment required.
  - Terminated = the appointment has been terminated with the state.

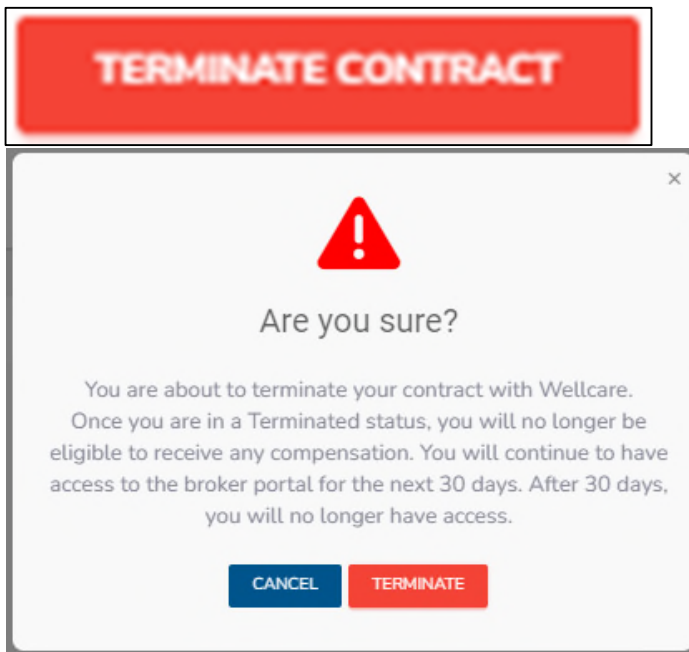
**Note:** Wellcare manages the appointments with each state. There is no action on your part. This tab is just for monitoring and tracking your credentials.



# My Credentials

## My Status & Credentials – Terminate Your Contract

- As a level 01 Broker, you can terminate your contract with Wellcare at any time
- Please be advised that once you are terminated, you will only have portal access for 30 days. After 30 days your access will be revoked
- To sell Wellcare products again, you will need to request a new invitation and complete all onboarding requirements





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# My Account

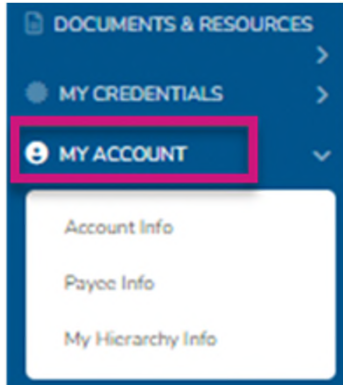
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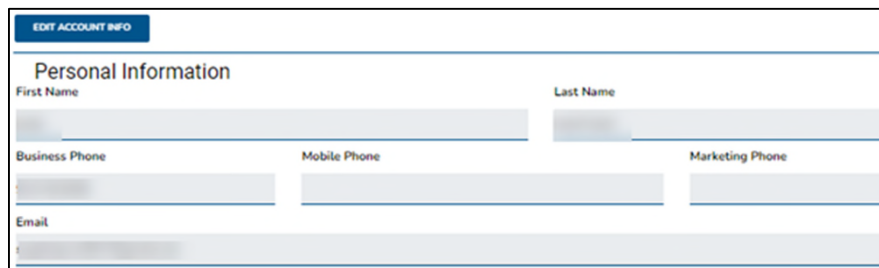
# My Account

## Account Info – Personal Information

Your Account Information captures your name and contact information on file.



- By selecting **Edit Account Info** you can update your phone number, add a marketing phone number, and/or update email etc.

A screenshot of a web form titled 'EDIT ACCOUNT INFO'. The form is divided into sections. The first section is 'Personal Information' and contains two input fields: 'First Name' and 'Last Name'. The second section contains three input fields: 'Business Phone', 'Mobile Phone', and 'Marketing Phone'. The third section contains one input field: 'Email'.

**Note:** When updating first or last name, you will be prompted to the Payee Info tab to make those updates and complete a W9 form.



# My Account

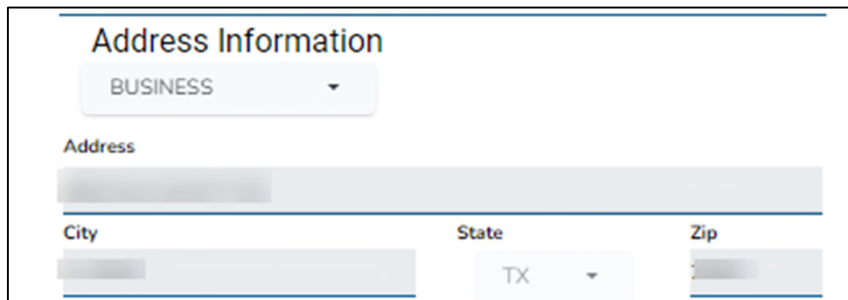
## Account Info – Address Information

Your Account Information captures your name and contact information on file.



A screenshot of a web interface showing a dropdown menu titled "Address Information". The menu is currently set to "BUSINESS" and is open, showing two options: "Business" (highlighted in blue) and "Shipping".

- By selecting **Edit Account Info** update your Business or Shipping Address



A screenshot of the "Address Information" form. At the top, there is a dropdown menu labeled "BUSINESS". Below it, the "Address" field is shown as a single-line text input. Underneath, there are three fields: "City", "State", and "Zip". The "State" field is a dropdown menu currently showing "TX".

**Note:** When updating the Shipping Address, you will be prompted to the Payee Info tab to make those updates and complete a W9 form.

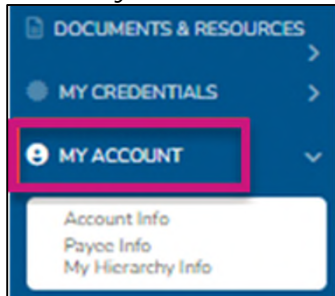




# My Account

## Payee Info

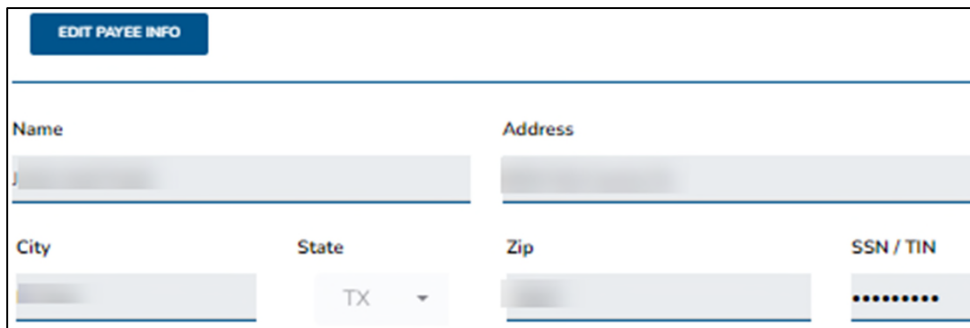
The Payee Info tab captures name and address on file for payment.



- Select the **Edit Payee Info** tab to update name or address
- The 1099 that will generate will match the information on this screen

**Note:** Updating name or address will cause a prompt to complete a new W9 form.

- Once the W9 has been completed, promotion to the Account Info page will occur to make the updates as well. This will ensure payee info matches your information within your broker profile.

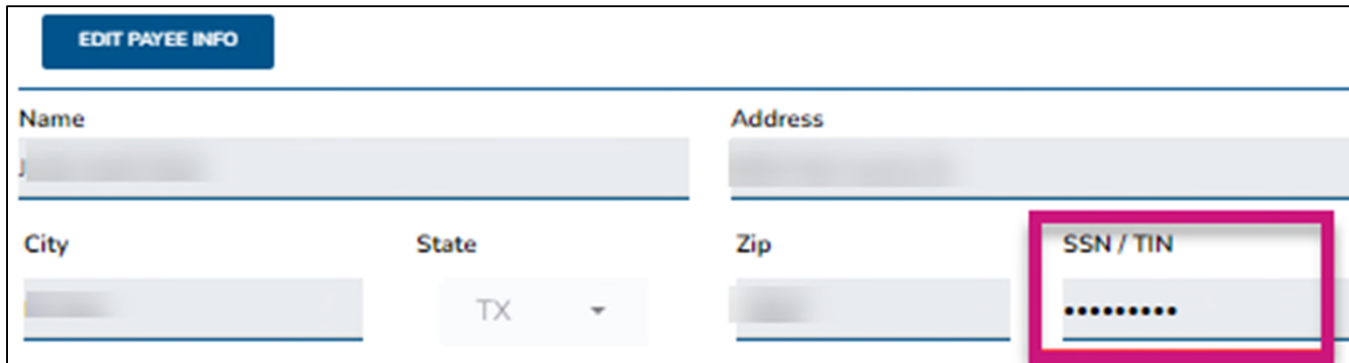


# My Account

## Payee Info – Create a Payee Profile

To declare a private company as your payee, select the **Edit Payee Info** button and update the information to reflect that of your company.

- Name = Name of the business / private company
- Address = Shipping Address
- SSN / TIN = the TIN of the business / private company
- Then select **Save**
- A prompt will display to complete a new W9.



The screenshot shows a form titled "EDIT PAYEE INFO". The form is divided into two columns. The left column contains fields for "Name", "City", and "State". The right column contains fields for "Address", "Zip", and "SSN / TIN". The "SSN / TIN" field is highlighted with a red box. The "State" dropdown menu is set to "TX".

**Note:** When you declare a private company to be your payee, your 1099 will be in the name of this entity. A Tax ID can only be used once as a Payee. Two brokers cannot share a Payee Profile.



# My Account

## Payee Info – Create a Payee Profile, Cont.

- The Business Entity Information will be prefilled from what was entered under the Edit Payee Info button
- To make any adjustments, edit these fields

PAYMENT INFORMATION W9 FORM

### Payee

You are eligible to declare a private company, that you legally represent or own, to be your payee. This means that any money earned is paid to the Tax ID of this company. It also means that the 1099 tax form issued to you will be in the name and Tax ID of this company. If you chose to declare a payee, you will be prompted to sign a W9 form for your declared company payee. If you chose to not declare a company as your payee, then you will be the payee on record. This means that the 1099 tax form issued to you will be in your name and SSN. You will be prompted to sign a W9 form with your information.

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 *	El Paso
Business State *	Texas
Business Zip *	79907



# My Account

## Payee Info – Create a Payee Profile, Cont.

- Once the Business Entity Information is accurate, scroll down to the W-9 Information
- Assign the appropriate taxation type for your private company
- It is required to check the box, acknowledging that you are legally authorized to execute contracts and agreements on behalf of the company
- Proceed to the Banking Information and complete all required ACH fields
- Select **Continue**

The screenshot displays a web form titled 'PAYMENT INFORMATION' with a 'W9 FORM' label in the top right corner. The form is divided into two main sections: 'W-9 Information' and 'Banking Information'. In the 'W-9 Information' section, the 'Taxation Type' dropdown menu is highlighted with a red box and currently shows '--'. Below it, a checkbox is also highlighted with a red box and is currently unchecked. To the right of the checkbox is the text: 'I declare that I am legally authorized to execute contracts and agreements on behalf of myself or the legal entity I represent.' The 'Banking Information' section is also highlighted with a red box and contains several fields: 'Payment Method' (set to 'ACH (Direct Deposit)'), 'Account Type' (set to 'Checking'), '[?] Account Number' (masked with dots), 'Verify Account Number' (masked with dots), '[?] Routing Number' (masked with dots), and 'Financial Institution'. At the bottom of the form, there are two buttons: a red 'ABORT' button and a blue 'CONTINUE' button, with the 'CONTINUE' button highlighted by a red box.



# My Account

## Payee Info – Create a Payee Profile, Cont.

- The copy of the updated W-9 will populate
  - Download a copy at this time
- The final steps are to acknowledge the W9 is accurate and complete your signature
- Select the **Submit** button
- The workflow will be completed, and your Payee Info will be updated

1 / 1 | - + | ↻ | ⏴ ⏵ |

**W-9** Request for Taxpayer Identification Number and Certification

Form 1042-R (09-18-2016)  
Department of the Treasury  
Internal Revenue Service

Give Form to the requester. Do not send to the IRS.

1. Name of person or entity to whom form is required on file (do not check this box)

2. Business name (individual only, none if different from above)

3. Check appropriate box for federal tax classification of the person whose name is entered on line 1. Check only one of the following single boxes.

4. Exemptions (provide only if you are exempt from backup withholding, not otherwise, see instructions on page 3)

5. Date of birth (or other identifying number) of the individual (do not check this box if the U.S. TIN is a TIN for an entity, other than a single member S-Corp, or if designated from the owner unless the owner of the U.S. TIN is designated from the owner should check the appropriate box for the tax classification of its owner)

6. Taxpayer from FATCA reporting (check if any)

7. Other (see instructions)

8. Taxpayer's name and address (optional)

9. Tax account number, tax optional

**Part I Employer Identification Number (EIN)**

Enter the EIN of the entity on this form. The TIN provided must match the name given on line 1 to avoid backup withholding. For individuals, this is generally your social security number (SSN). However, for a resident alien, sole proprietor, or disregarded entity, see the instructions for Part I, later. For other entities, if it is your employer identification number (EIN), if you do not have a number, see how to get a TIN, later.

**Part II Certification**

Under penalties of perjury, I certify that:

1. The number shown on this form is my correct taxpayer identification number (or I am waiting for a number to be issued to me), and
2. I am not subject to backup withholding because (a) I am exempt from backup withholding, or (b) I have not been notified by the Internal Revenue Service (IRS) that I am subject to backup withholding as a result of a failure to report all interest or dividends, or (c) the IRS has notified me that I am no longer subject to backup withholding; and
3. I am a U.S. citizen or other U.S. person (defined below); and
4. The FATCA (check) entered on this form (if any) indicating that I am exempt from FATCA reporting is correct.

Certification instructions: You must check all four 1-4 above if you have been notified by the IRS that you are currently subject to backup withholding because you have failed to report all interest and dividends or other tax income. You will receive instructions from the IRS that state: "File address change card."

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

Date \*

IP Address \*

Please sign your name in the space below.

CLEAR

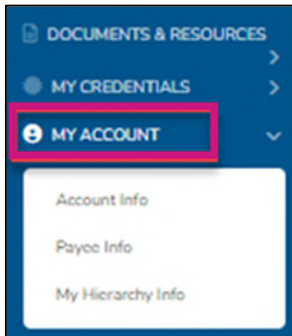
SUBMIT



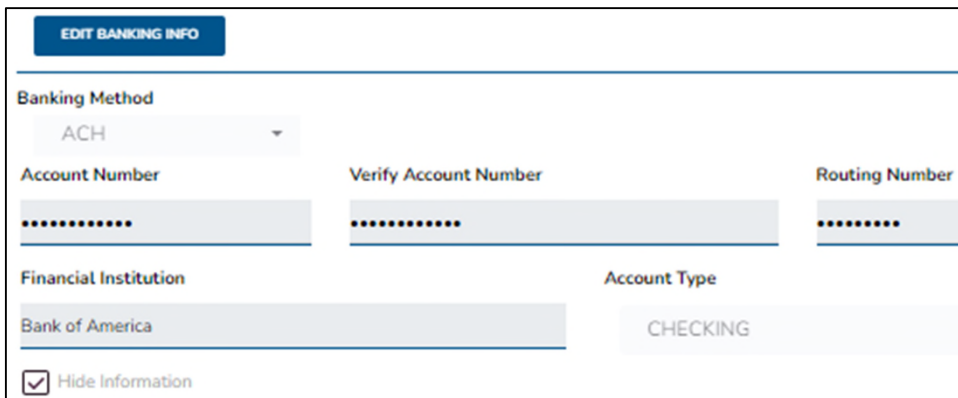
# My Account

## Payee Info – Edit Banking Info

If you are receiving your own commissions, edit your Banking Information to ensure ACH deposits go into the right account.



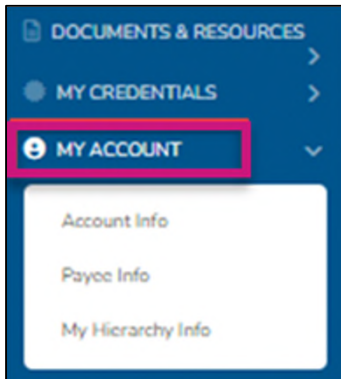
- Select the **Edit Banking Info** button and the fields will become editable to make changes.
- Uncheck the **Hide Information** box and the Account/Routing Numbers will become visible.

A screenshot of the 'EDIT BANKING INFO' form. The form has a blue header with the text 'EDIT BANKING INFO'. Below the header, there are several fields: 'Banking Method' (a dropdown menu with 'ACH' selected), 'Account Number' (a text field with a masked number), 'Verify Account Number' (a text field with a masked number), 'Routing Number' (a text field with a masked number), 'Financial Institution' (a text field with 'Bank of America' entered), and 'Account Type' (a dropdown menu with 'CHECKING' selected). At the bottom left, there is a checkbox labeled 'Hide Information' which is currently checked.

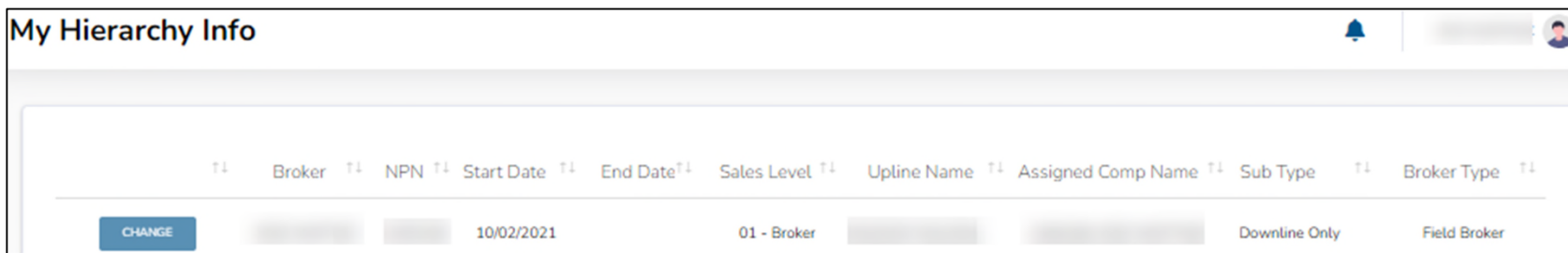
# My Account

## My Hierarchy Info

The My Hierarchy Info tab provides a snapshot of the level, upline information (if applicable), compensation assignment, Sub Type, and Broker Type.



- This tab will also provide upline history and the time spans where you were reporting to a different upline or were a different sub type.
- To make a change to your upline or compensation assignment, please select the **Change** button.



**My Hierarchy Info**

	Broker	NPN	Start Date	End Date	Sales Level	Upline Name	Assigned Comp Name	Sub Type	Broker Type
<a href="#">CHANGE</a>			10/02/2021		01 - Broker			Downline Only	Field Broker

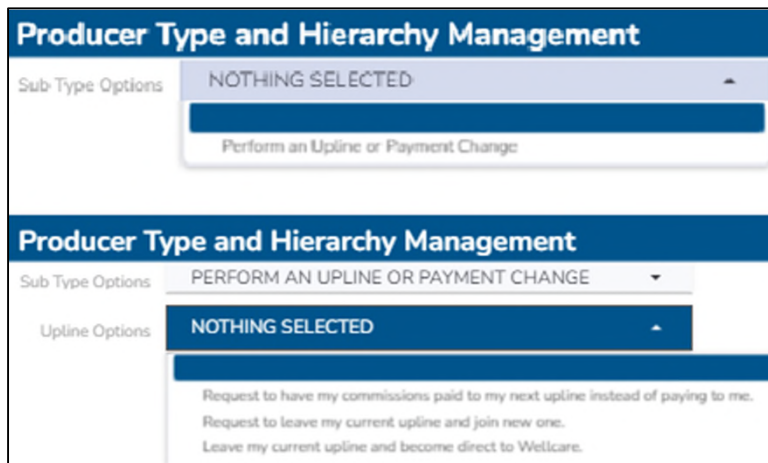


# My Account

## My Hierarchy Info – Make Changes

- Once the Change button has been selected, a new window will open
- The summary of the current situation will populate to confirm the current set up
- Select the **Perform an Upline or Payment Change** option from the drop-down menu
- Select from the following options:
  - Request to have my commissions paid to my next upline instead of paying to me
  - Request to have my commissions paid to me instead of to my next upline
  - Request to leave my current upline and join a new one
  - Leave my current upline and become direct to Wellcare

**Note:** The options available will be dependent on current subtype



**Producer Type and Hierarchy Management**

Sub-Type Options: NOTHING SELECTED

Perform an Upline or Payment Change

**Producer Type and Hierarchy Management**

Sub-Type Options: PERFORM AN UPLINE OR PAYMENT CHANGE

Upline Options: NOTHING SELECTED

Request to have my commissions paid to my next upline instead of paying to me.  
Request to leave my current upline and join new one.  
Leave my current upline and become direct to Wellcare.

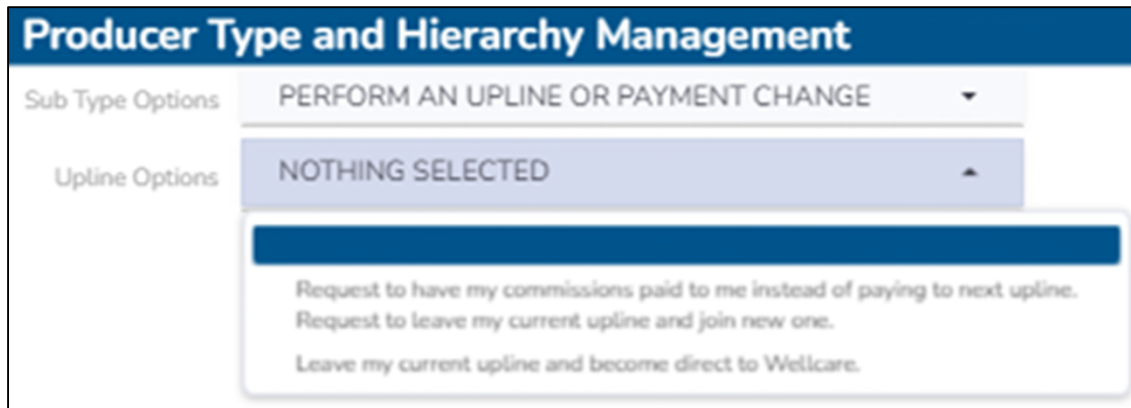




# My Account

## My Hierarchy Info – Make Changes, Cont.

- If the commission assignment is changed to self, a prompt will display to complete a W9 and provide ACH information.
- If a request to go Direct to Wellcare is selected, the request will process immediately.
  - If the previous subtype was Dual Assignment, it will also be required to complete a W9 and provide ACH information

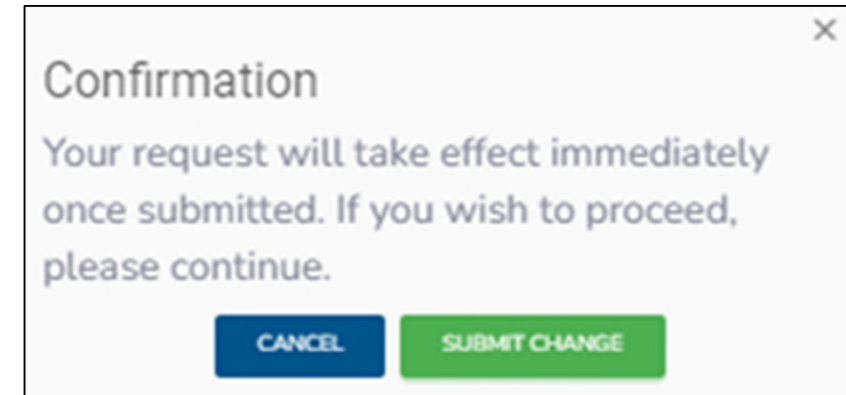


**Producer Type and Hierarchy Management**

Sub Type Options: PERFORM AN UPLINE OR PAYMENT CHANGE

Upline Options: NOTHING SELECTED

Request to have my commissions paid to me instead of paying to next upline.  
Request to leave my current upline and join new one.  
Leave my current upline and become direct to Wellcare.



**Confirmation**

Your request will take effect immediately once submitted. If you wish to proceed, please continue.

CANCEL SUBMIT CHANGE



# My Account

## My Hierarchy Info – Make Changes, Cont.

- For a request to change your hierarchy, determine if you will receive your own commissions or if they will be assigned to your new requested upline
- Provide the name or NPN of this requested upline
- Once the correct next upline is selected, select **Update**

**Note:** If you are an LOA Field Broker, you must first request to be released from the LOA subtype. Please contact Sales Support or your upline for assistance to process these changes.

The image shows two screenshots of a web form titled "Producer Type and Hierarchy Management".

The top screenshot shows the form with the following options selected:

- Sub Type Options: PERFORM AN UPLINE OR PAYMENT CHANGE
- Upline Options: REQUEST TO LEAVE MY CURRENT UPLINE AND JOI
- Will your new upline be receiving your commissions or will they be paid to you?: --

The bottom screenshot shows the form after a selection has been made:

- Sub Type Options: PERFORM AN UPLINE OR PAYMENT CHANGE
- Upline Options: REQUEST TO LEAVE MY CURRENT UPLINE AND JOI
- Will your new upline be receiving your commissions or will they be paid to you?: I WILL GET PAID MY COMMISSIONS.
- Next Upline: (field is empty)

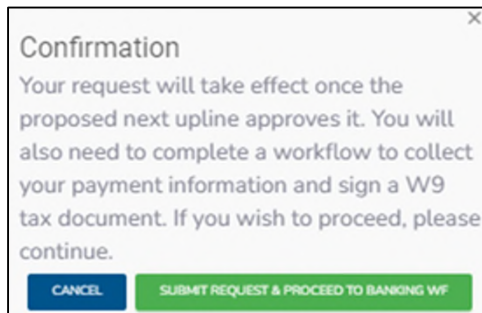
An "UPDATE" button is highlighted with a red box at the bottom of the form.



# My Account

## My Hierarchy Info – Make Changes, Cont.

- Select **Update**, then confirm to submit this request to the new proposed upline.
- The proposed upline will receive a request within their own portal to either accept or deny your request to join their hierarchy.
- If they accept, your hierarchy information will update as of the accepted date.
- If they deny, your current hierarchy information will remain active. Submit a new change request.



- Once the request is submitted, your current hierarchy line will update to Request Pending, and you will not be able to submit additional changes.
- To view more details about the submitted request, select **Request Pending** to be directed to Workflows. Cancel the request is an option from this window as well.

Broker	NPN	Start Date	End Date	Sales Level	Upline Name	Assigned Comp Name	Sub Type	Broker Type
Request Pending		10/01/2021		01 - Broker			Dual Assignment	Field Broker





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# Support Tickets

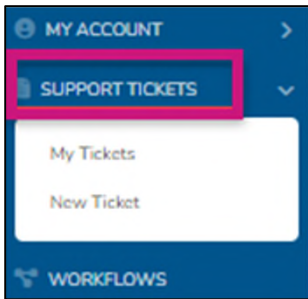
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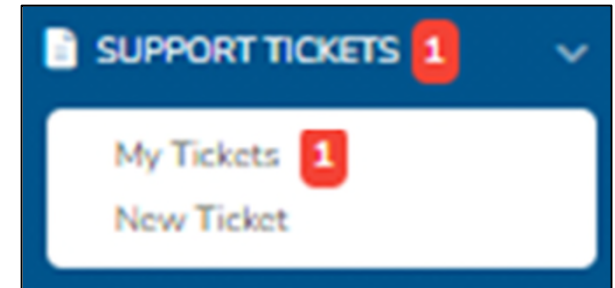
# Support Tickets

## My Tickets

The My Tickets tab allows the tracking of the status and responses on all inquiries submitted.



- If there is an action item, there will be a red number next to My Tickets



- Use the following criteria to filter down the results: Ticket Number, ticket status, ticket type, and ticket subtype
- Tickets will automatically be filtered to show any **Pending Broker Response** tickets at the top

Ticket Number	Status	Type	Subtype	Description	Status	Date Created	Last Updated	Updated By
Ticket 615	Pending: Broker Response	Commissions	Initial Payments	I am missing an initial payment for M. Brown. Please research this issue.	Pending: Broker Response	03/09/2022 01:08 PM PST	03/09/2022 01:13 PM PST	
Ticket 616	Resolved	Enrollment	New Paper Enrollment Submissions	Please see application for T. Williams	Resolved	03/09/2022 01:12 PM PST	03/09/2022 01:12 PM PST	
Ticket 614	Escalation: Enrollment	Member Related Inquiry	Member Status Inquiry	What is the status of M. Smith? MBI: XXXXXXXXXX	Escalation: Enrollment	03/09/2022 01:06 PM PST	03/09/2022 01:12 PM PST	



# Support Tickets

## My Tickets – Ticket Statuses

The My Tickets tab allows to track the status and responses on all inquiries submitted.

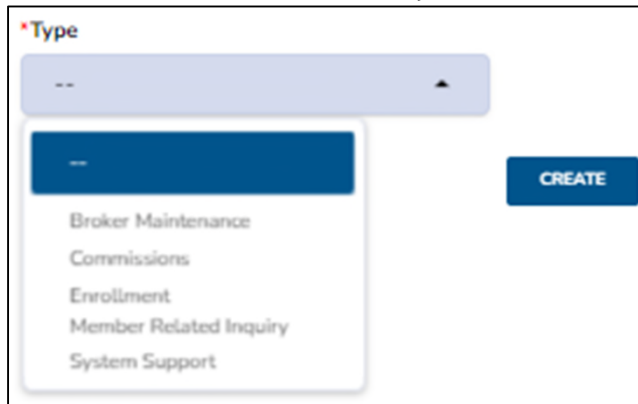
Status	Status Meaning
Resolved	Your inquiry has been worked and is resolved. The ticket is closed.
Pending Resolver	Your inquiry has been submitted and is in the queue to be assigned to a Sales Support rep.
Pending Broker Response	Sales Support requires additional information from you to resolve your inquiry.
Escalation: Enrollment	Your inquiry has been sent to Accounts Payable. Once they provide a response back to Sales Support, we will resolve your inquiry.
Escalation: Accounts Payable	Your inquiry has been sent to Accounts Payable. Once they provide a response back to Sales Support, we will resolve your inquiry.
Escalation: IT Solutions Team	Your inquiry has been sent to IT. Once they provide a response back to Sales Support, we will resolve your inquiry.



# Support Tickets

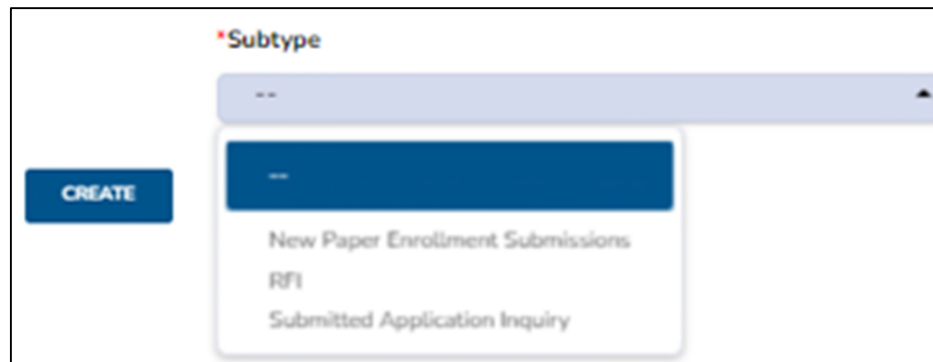
## New Ticket

To create a new ticket, select the ticket type for your inquiry.



A screenshot of a web form titled '\*Type'. It features a dropdown menu with a light blue background and a dark blue arrow on the right. Below the dropdown, a list of options is displayed: a dark blue bar with a white arrow, followed by 'Broker Maintenance', 'Commissions', 'Enrollment', 'Member Related Inquiry', and 'System Support'. To the right of the dropdown is a blue 'CREATE' button.

- Once the ticket type is selected, the ticket subtype can then be selected
  - This is a more specific description of your inquiry



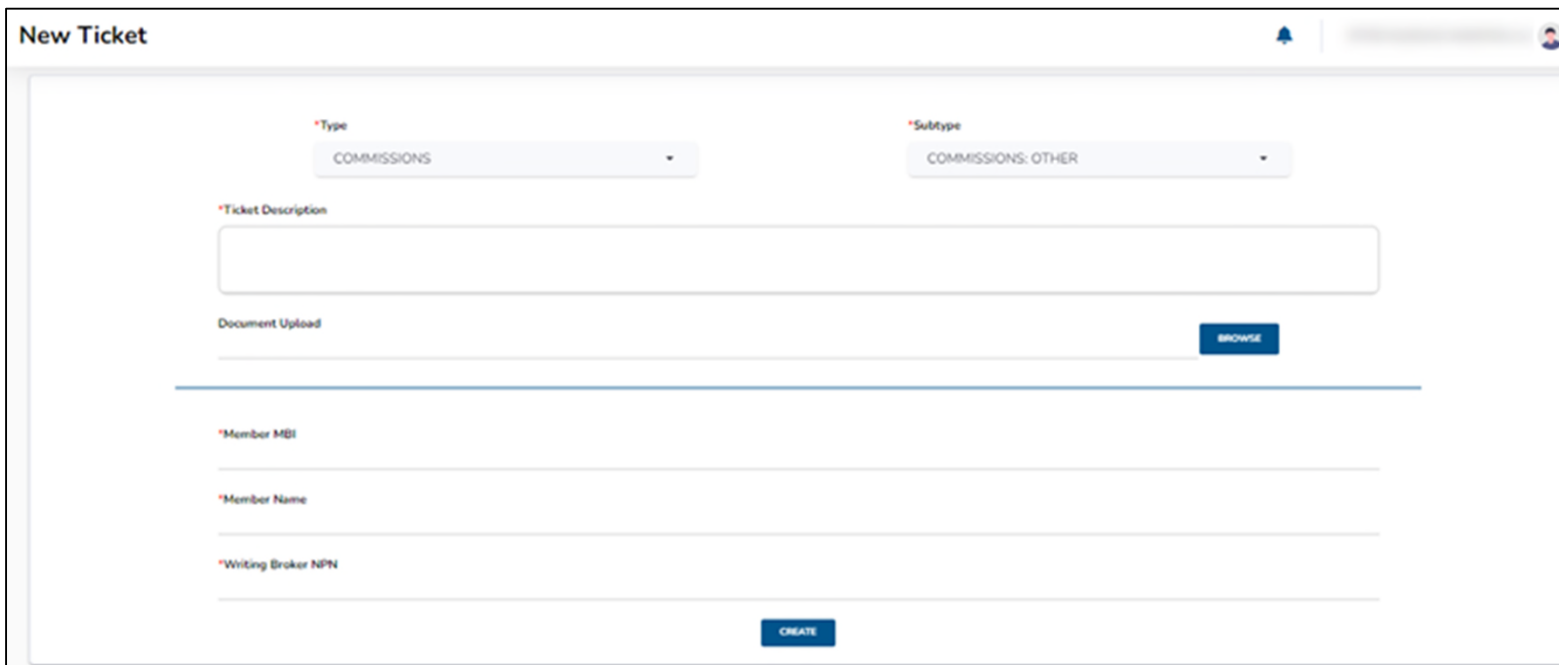
A screenshot of a web form titled '\*Subtype'. It features a dropdown menu with a light blue background and a dark blue arrow on the right. Below the dropdown, a list of options is displayed: a dark blue bar with a white arrow, followed by 'New Paper Enrollment Submissions', 'RFI', and 'Submitted Application Inquiry'. To the left of the dropdown is a blue 'CREATE' button.



# Support Tickets

## New Ticket, Cont.

- Every ticket type requires a description
  - This is an open field to enter in details about the inquiry
- Depending on the subtype, specific data points will be required to submit the ticket
- For every inquiry, please provide as much information as possible so that Sales Support can best assist you!
- Once all requirements are completed, select **Create** to submit your inquiry



The screenshot shows a web form titled "New Ticket". At the top right, there is a notification bell icon and a user profile icon. The form contains the following fields and controls:

- Type:** A dropdown menu with "COMMISSIONS" selected.
- Subtype:** A dropdown menu with "COMMISSIONS: OTHER" selected.
- Ticket Description:** A large text input field.
- Document Upload:** A label above a horizontal line, with a "BROWSE" button to the right.
- Member MBI:** A text input field.
- Member Name:** A text input field.
- Writing Broker NPN:** A text input field.
- CREATE:** A blue button at the bottom center of the form.







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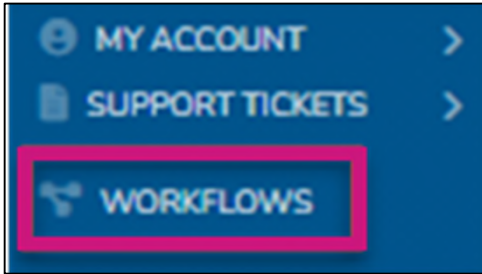
# Workflows

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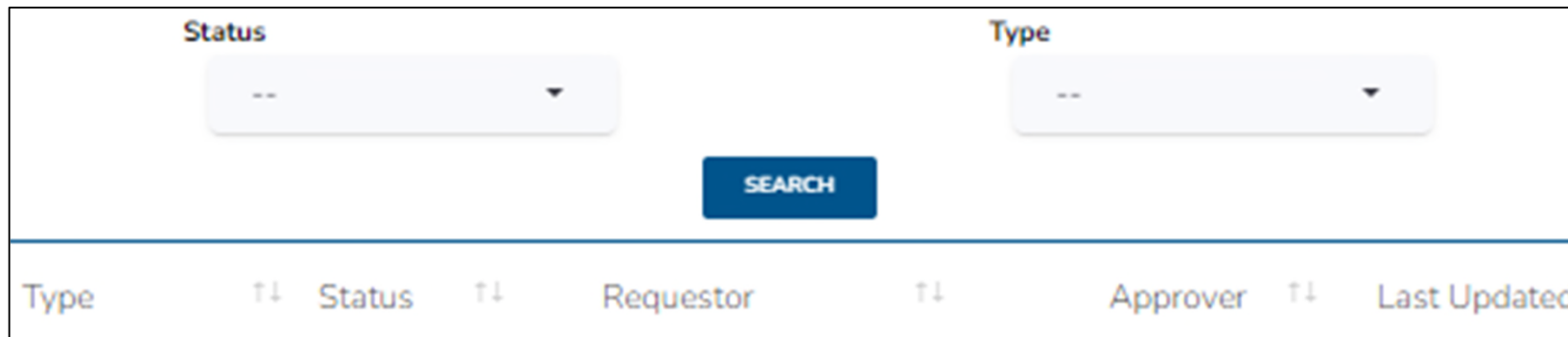


# Workflows

The Workflows tab tracks all cases that have been created by or assigned to you.



- Workflows include: completing a new W9, requesting a hierarchy change, becoming a principal of an agency, etc.
- Filter Workflows by Status and Type
- Track when the Workflow was last updated and who is the assigned approver
- Approve or deny hierarchy change requests

A screenshot of a workflow management interface. At the top, there are two dropdown menus labeled 'Status' and 'Type', both showing '--' as the selected option. Below these is a blue 'SEARCH' button. At the bottom, there is a table header with columns: 'Type', 'Status', 'Requestor', 'Approver', and 'Last Updated'. Each column has a small up/down arrow icon next to it, indicating that the columns are sortable.



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Questions?

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