



CENTENE  
**Workbench**

**wellcare**<sup>®</sup>

# Onboarding – Broker Guide

# Purpose of this Document

**With this guide, all brokers and agencies will be able to:**

- Fully complete an invitation and fully certify to gain Centene Workbench portal access
- Understand the differences in broker Sub-Types

**Icon use:**

| Icon                                                                                | Function                  |
|-------------------------------------------------------------------------------------|---------------------------|
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- Payment: Licensed Only Agent and Dual Assignment  
Sub Type
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- State Licenses
- Submit

## Onboarding Completed

## Sub Type Definitions

Confidential and Proprietary Information



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# Initiating a Producer Agreement

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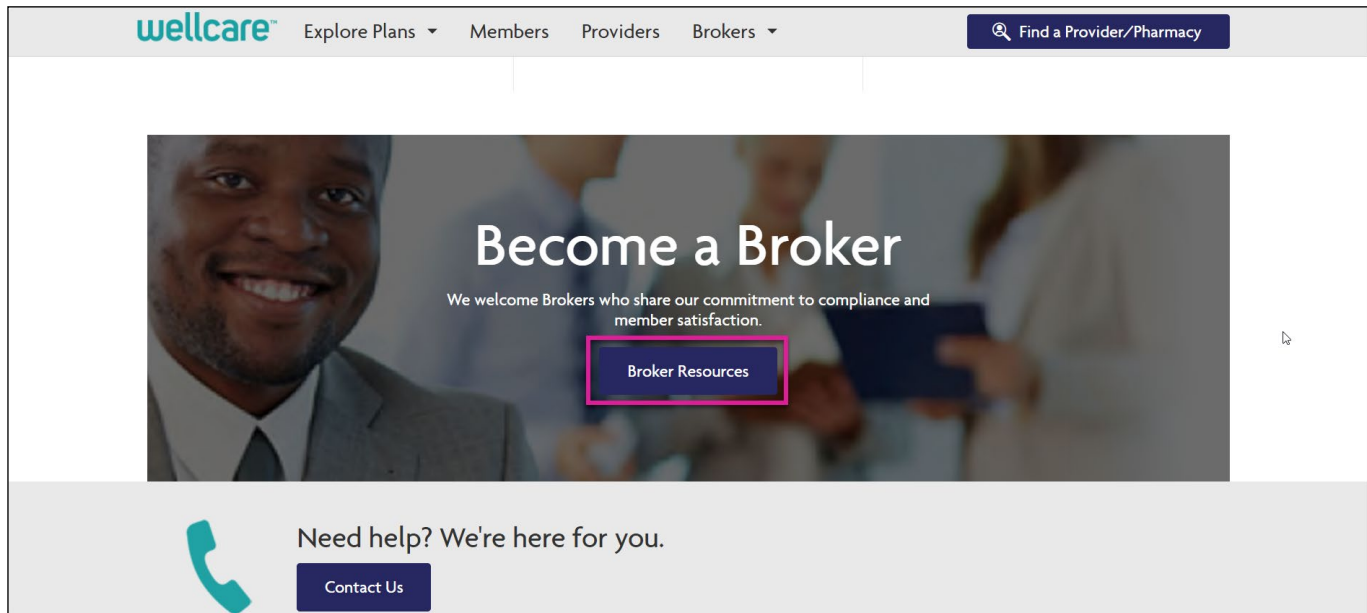
Confidential and Proprietary Information



# Initiating a Producer Agreement

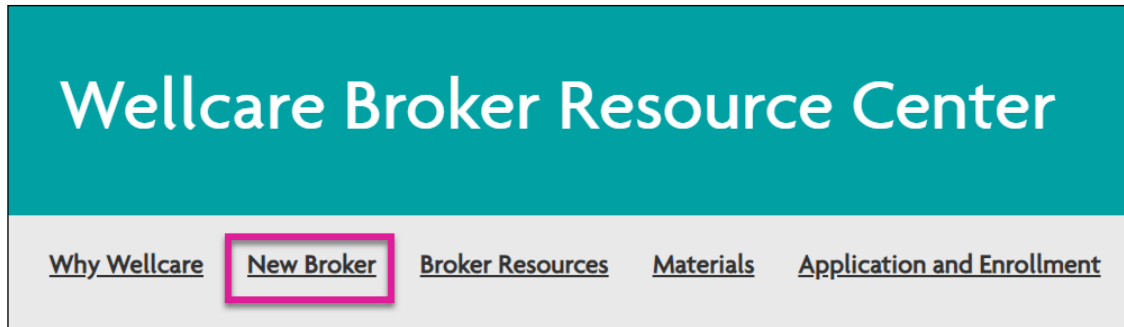
Brokers who wish to contract direct to Wellcare can initiate their onboarding directly from the Wellcare website.

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

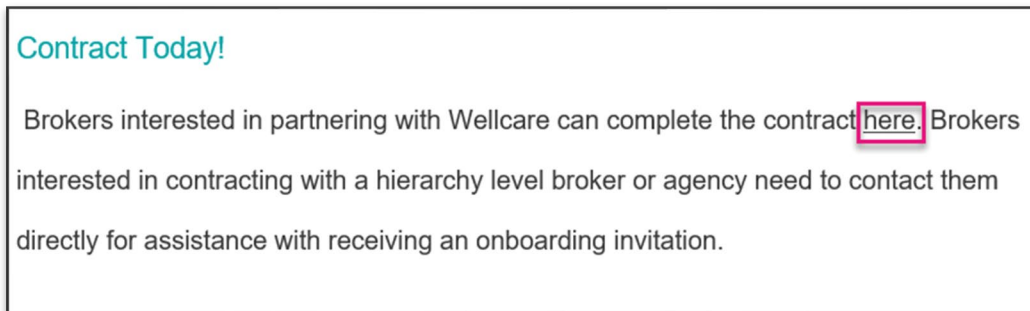


# Initiating a Producer Agreement Cont.

## 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 Producer Agreement Cont.

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. The main heading says 'Complete the fields below to request a Direct to Wellcare sales broker contracting invitation.' A 'Please note:' section contains four bullet points: 1. 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. 2. To contract under an agency, contact the agency so they can invite you to contract as a downline broker to them. 3. You're required to enter your NPN, email address, and SSN. All the data is securely encrypted and complies with HIPAA regulations. 4. For assistance, please contact Wellcare Broker Support at (866) 822-1339. Below the notes are three input fields labeled 'NPN', 'Email', and 'SSN'. At the bottom right is a blue 'Submit' button.



# Initiating a Producer Agreement Cont.

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 within a white rectangular box that has a teal border. The logo consists of the word "wellcare" in a lowercase, sans-serif font, with a registered trademark symbol (®) to the upper right of the "e".

An onboarding invitation has been sent from [Centene@evolvenxt.com](mailto:Centene@evolvenxt.com) to your email.  
Please follow the email instructions to complete the onboarding process.



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# Receiving Email Invitation and Logging into PingOne

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# Receiving Email Invitation and Logging into PingOne

1. An email invitation will be sent from [centene@evolvenxt.com](mailto: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!

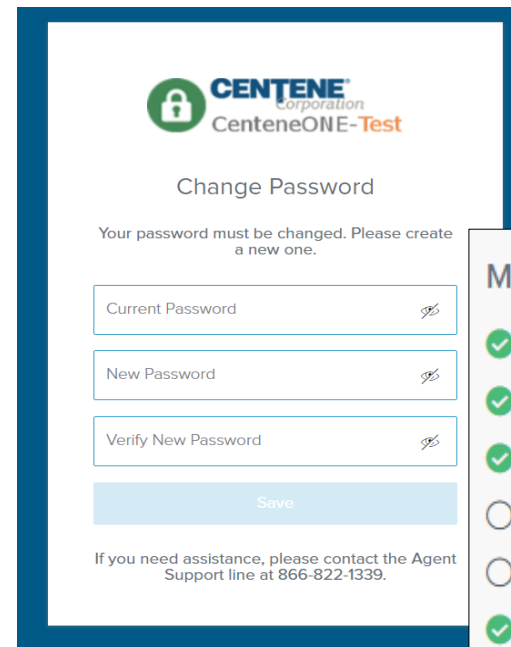
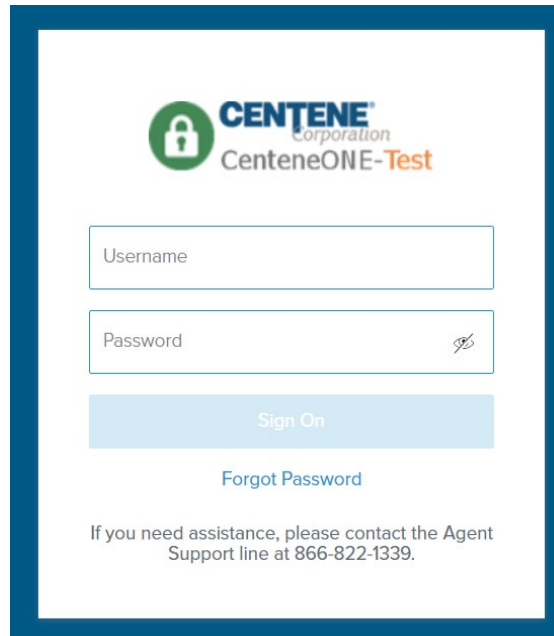
Regards,

Sales Support



# Receiving Email Invitation and Logging into PingOne Cont.

2. Select the portal URL link in the email, which will redirect to PingOne 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**
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)



## 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



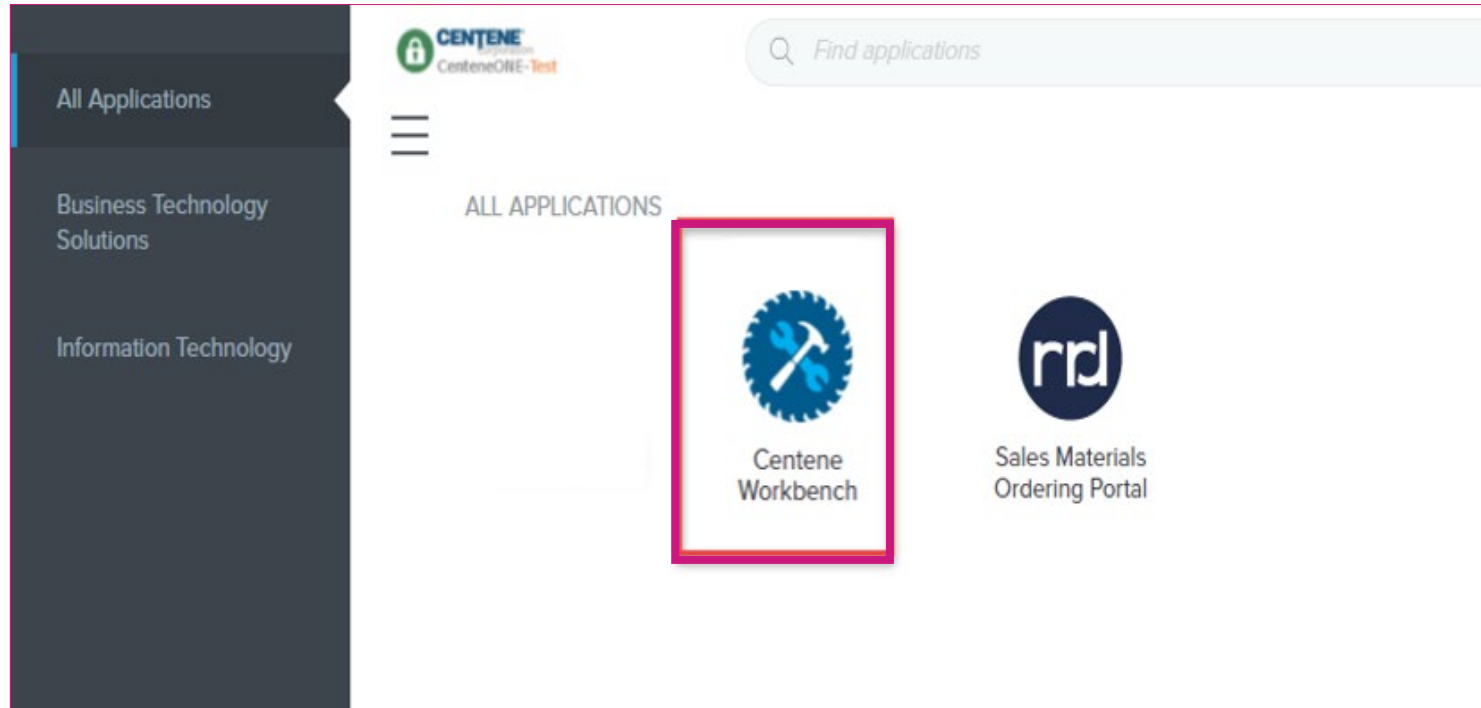
# Receiving Email Invitation and Logging into PingOne Cont.

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



# Receiving Email Invitation and Logging into PingOne Cont.

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



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# Completing Onboarding

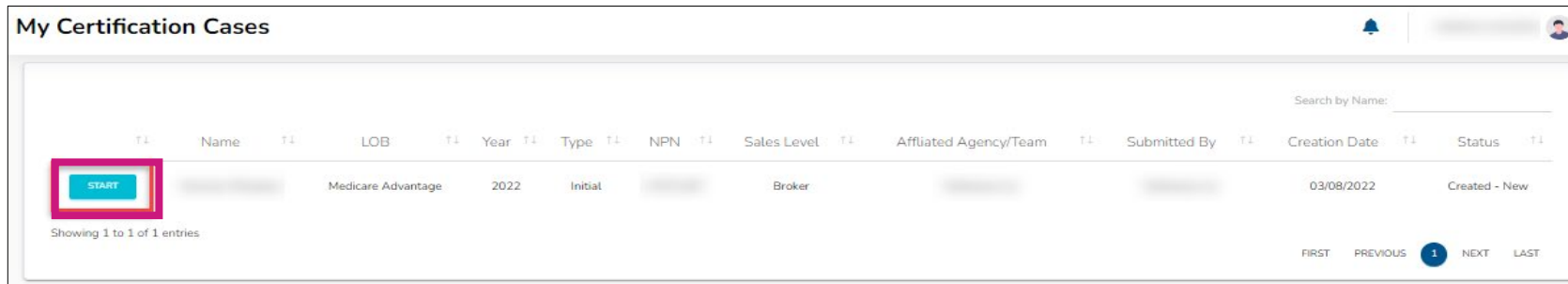
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# Completing Onboarding

Upon initial onboarding, you will see the pending onboarding case under **My Certification Cases**

1. Select **Start** to enter the contract



**My Certification Cases**

Search by Name: \_\_\_\_\_

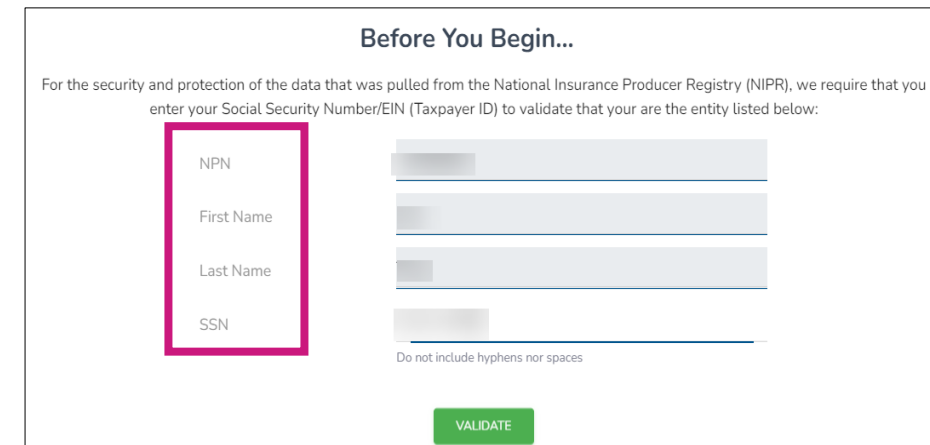
| Name       | LOB                | Year | Type    | NPN        | Sales Level | Affiliated Agency/Team | Submitted By | Creation Date | Status        |
|------------|--------------------|------|---------|------------|-------------|------------------------|--------------|---------------|---------------|
| [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

2. To access the onboarding case, you will need to validate your **Social Security Number (SSN)/Tax Identification Number (TIN)** against the NPN provided in your invitation. 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, Marketing URL 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: [Prepopulated]

First Name: [Redacted]

Last Name: [Redacted]

SSN: [Redacted]

Do not include hyphens nor spaces

**VALIDATE**



# Completing Onboarding: Demographics



1. Select the **Demographics** tab under **My Certification Cases**
2. Your demographics information will automatically load in from NIPR
3. Be sure 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.
  - **Veteran Status:** Required
    - Select **Yes** if you served on active duty in the U.S. Armed Forces.
    - Select **No** if you were not on active duty in the U.S. Armed Forces.



My Certification Cases

DEMOGRAPHICS PAYMENT STATE LICENSES SUBMIT

Fields marked with an asterisk (\*) are required.

Personal Information

First Name\*  
Middle Initial  
Last Name\*  
SSN\*  
NPN\*  
DOB\*  
Mobile Phone\*  
Business Phone\*  
Marketing Phone  
Email\*  
Secondary Email  
Job Title

My Certification Cases

DEMOGRAPHICS MARKETING URL STATE LICENSES

Shipping Address Information

Note: The Shipping Address is used to receive paper materials.

Shipping Address Same as Primary? \* No

Address 1\*  
Address 2  
City\*  
State\*  
Zip Code \*

Background Information

Are you a U.S. Veteran, or are you currently serving in any branch of the U.S. Armed Forces? \* No

Broker Information

Broker Type Field Broker

# Completing Onboarding: Demographics Cont.

4. Once you have completed all demographic information, please review your **Upline** and **Sub Type** information. **Note:** Please review [Sub Type Definitions slide](#) for more information.
5. When you have confirmed this information is correct, please check the box acknowledging you understand, and then select **Continue**.

Upline Information

LOB

Sub Type

Sales Level

Next Upline

Medicare Advantage

Direct

01 - Broker

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

ABORT CASE

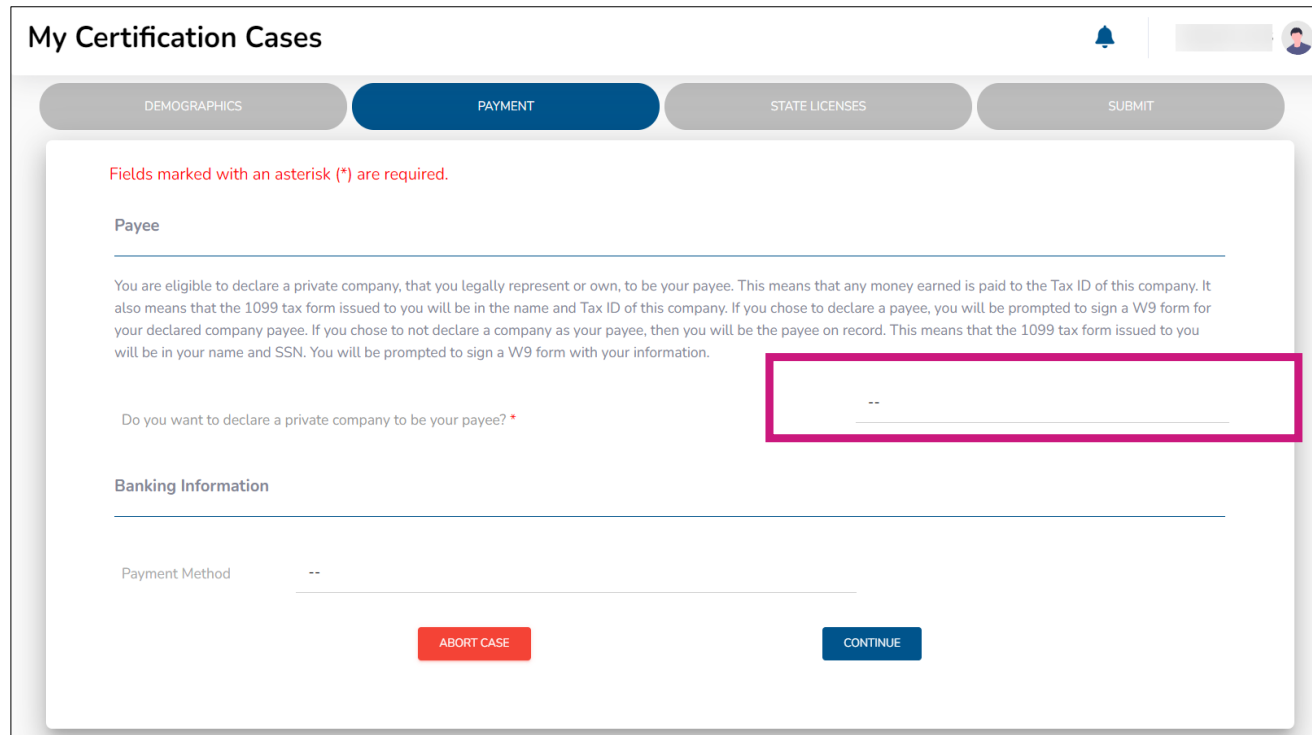
CONTINUE



# Completing Onboarding: 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.



**My Certification Cases**

DEMOGRAPHICS **PAYMENT** STATE LICENSES SUBMIT

Fields marked with an asterisk (\*) are required.

**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? \*

**Banking Information**

Payment Method --

ABORT CASE CONTINUE



# Completing Onboarding: Payment Cont.

## 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 W-9.  
**Note:** If you declare a private company as your payee, your 1099 will be in the name of that entity.
- Once all information is provided, select **Continue**

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

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

---

**Business Entity Information**

Taxpayer ID Number \*

Business Name DBA \*

Business Address \*

Business City \*

Business State \*

Business Zip \*

**W-9 Information**

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Taxation Type \*

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

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**Banking Information**

---

Payment Method



# Completing Onboarding: Payment Cont.

## 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? \*

No

Banking Information

Payment Method

ACH (Direct Deposit)

Account Type \*

--

[?] Account Number: \*

Verify Account Number \*

[?] Routing Number: \*

Financial Institution \*

ABORT CASE

CONTINUE



# Completing Onboarding: Payment Cont.

## Licensed-Only Agent and Dual Assignment Sub Type Payment Steps

- For the above-mentioned 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

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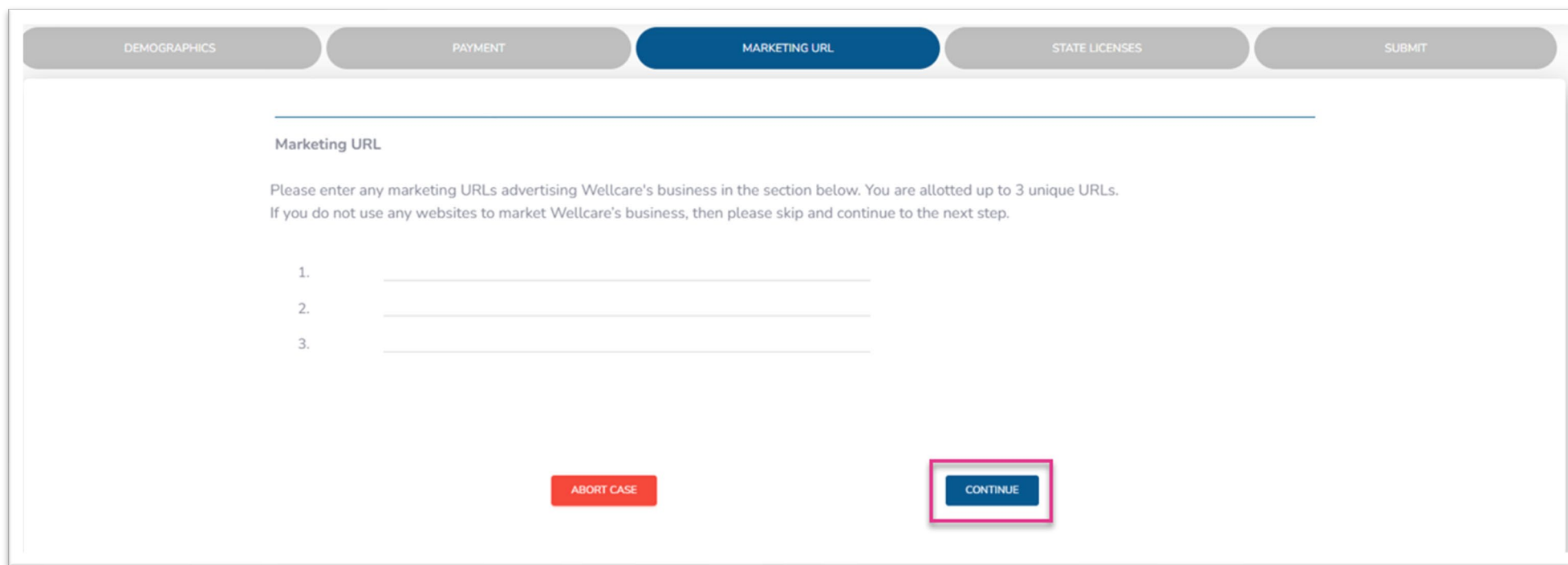
Based on the information collected in previous steps, no additional data needs to be collected here. Please click on "Continue" to proceed.





# Completing Onboarding: Marketing URL

- If you are using any websites to advertise and/or market Wellcare's business, you may enter up to 3 unique URLs in this section. If not, select **Continue** to skip this step.



The screenshot shows a web form with a progress bar at the top containing five steps: DEMOGRAPHICS, PAYMENT, MARKETING URL (highlighted in blue), STATE LICENSES, and SUBMIT. Below the progress bar, the section is titled "Marketing URL". A horizontal line separates the title from the instructions. The instructions read: "Please enter any marketing URLs advertising Wellcare's business in the section below. You are allotted up to 3 unique URLs. If you do not use any websites to market Wellcare's business, then please skip and continue to the next step." Below the instructions are three numbered input fields (1., 2., 3.) with horizontal lines for text entry. At the bottom of the form, there are two buttons: a red "ABORT CASE" button and a blue "CONTINUE" button. The "CONTINUE" button is highlighted with a pink rectangular border.



# Completing Onboarding: 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.

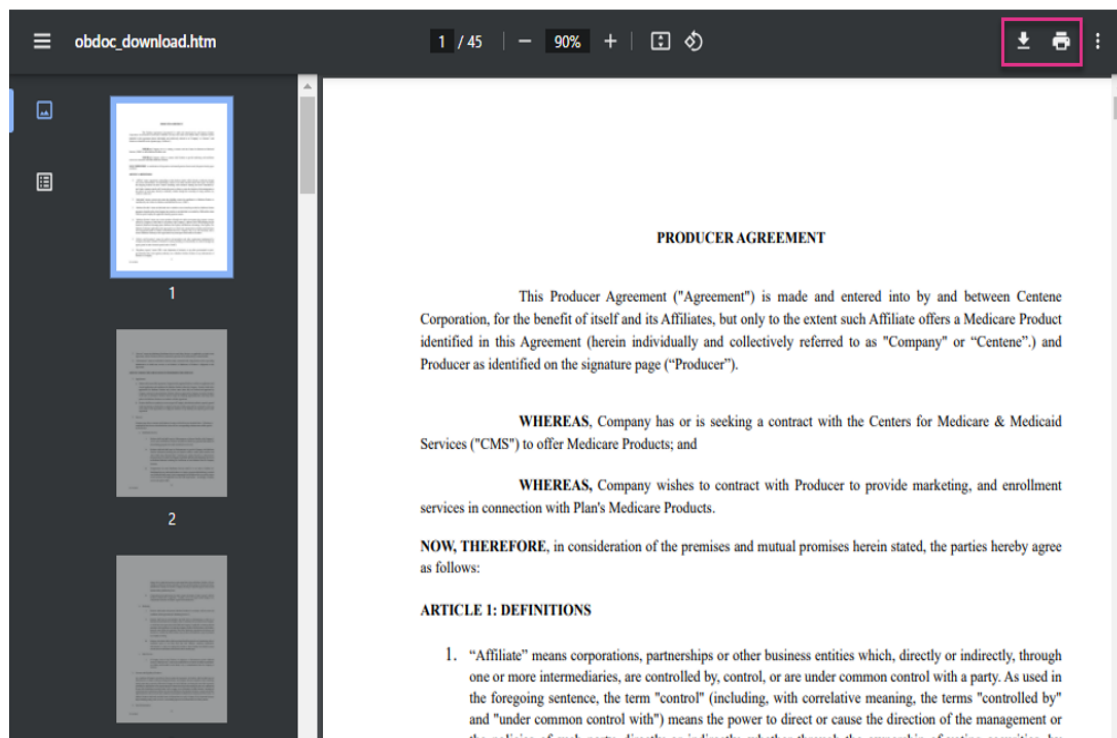
|                                                   |                                           |
|---------------------------------------------------|-------------------------------------------|
| <input checked="" type="checkbox"/> AR - Arkansas | <input type="checkbox"/> MS - Mississippi |
| <input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

ABORT CASE CONTINUE



# Completing Onboarding: Submit

1. Prior to submitting this onboarding case, you will be able to review the Producer Agreement, corresponding Compensation Exhibits, and W-9.
2. To submit your onboarding case, review and acknowledge the statements below. Use the open space to complete your signature, and then select **Submit**.



|                                           |  |
|-------------------------------------------|--|
| Producer Agreement                        |  |
| Producer Enrollment Services Compensation |  |
| W9                                        |  |

☒ I have read and understand the contents of the filled W9 document. I confirm that the information is accurate. I consent to sign the W9 document electronically.

☒ I have reviewed the Agreement and its attachments and I agree to be legally bound by their terms and conditions. I agree that my electronic signature is as valid as a handwritten signature.

Date \* 09/03/2024

IP Address \* 47.198.67.200, 47.198.67.200

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 signed W-9, Producer Agreement and corresponding Compensation Exhibits. Copies will be saved within your Portal documents.

**Note:** Certification requirements must now be met to become Active: Certified and ready to sell. Select **Go to Training** to begin required certifications.

## Submission Successful

Thank you for submitting your agreement.

Below is a copy of your signed agreement and exhibits (if applicable), ready to download! Copies will be saved within your Portal documents.

To complete your certification requirements, you will also need to complete training. Click "Go To Training" to continue.

GO TO TRAINING

Once all certification requirements are met, you will become Active: Certified and will be ready to sell.

[Download W9](#)

[Download Producer Agreement\\_Signed](#)

[Download Producer Enrollment Services Compensation\\_Signed](#)



# Sub Type Definitions

- **Downline Only:** This means you have a 1099 upline and you will receive your own commissions. After you are Active: Certified, you will have the ability to change your commission assignment to your upline, request to join a new hierarchy or become Direct to Wellcare.
- **Dual Assignment:** This means that you have a 1099 upline and your commissions are also assigned to this entity. After you are Active: Certified, you will have the ability to request to join a new hierarchy, change your commission assignment to self or become Direct to Wellcare.
- **Licensed Only Agent:** This means that you have a 1099 upline and your commissions are also assigned to this entity. If you are released from this upline, the book of business will stay with the upline.
- **Direct:** This means you are Direct to Wellcare with no upline and will receive your own commissions. After you are Active: Certified, you will have the ability to make changes to your commission assignment and request to join a new hierarchy.

