



CENTENE
Workbench

wellcare

TM

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


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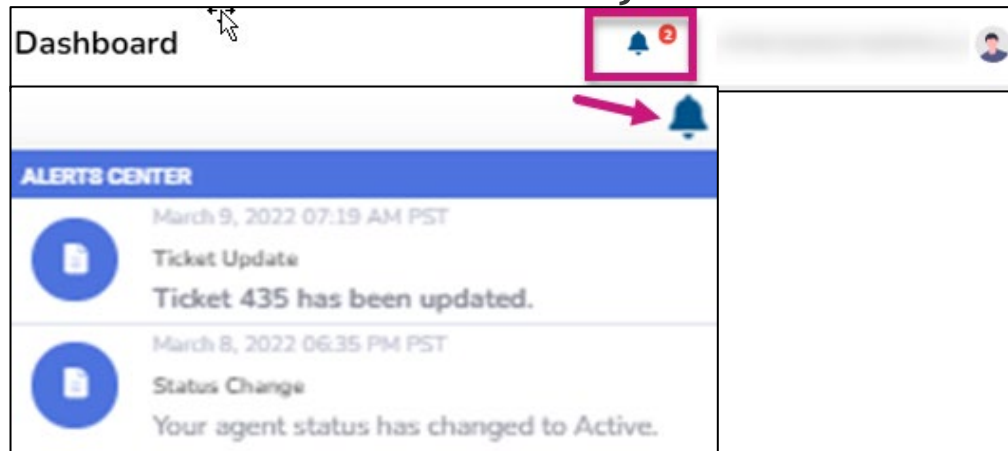
Dashboard



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

Note: To see more information, select View Details.

My Credentials	
Broker Status	Active/Certified
State Licenses	48 Active 2 Inactive
View Details	

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	\$
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

Note: To see more information, select View Details.

New Application Status				
App Date	Eff Date	Member Name	Plan	Status
View Details				

4. Quick Links

Provides a quick access to the most commonly used links

Quick Links	
Link	Description
Ascend Enrollment Platform	Enrollment Platform
Provider Lookup	Find a Provider Tool
Centene Learning Center	Training Platform
More Links	



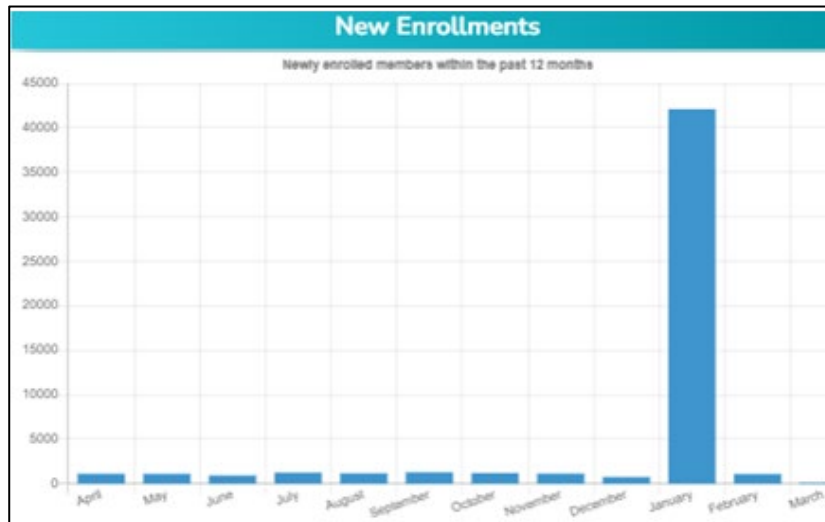
Dashboard

Widgets

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

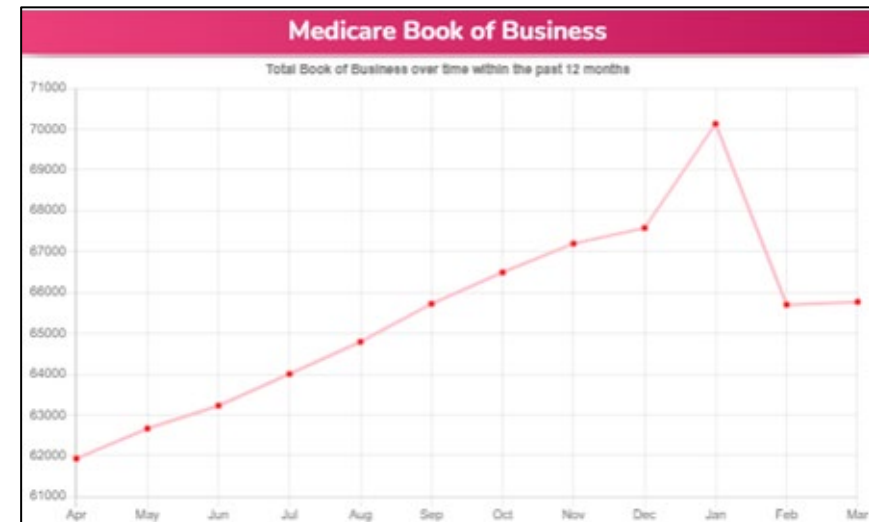
5. New Enrollments

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



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
- Statement Date (Stmt Date) corresponds with the payment date
 - Statements are published every Wednesday before payment on Friday

NOTE: If you are receiving one or have received payment via paper check, you will have an additional field “Chk#”

	↑↓ Stmt # ↑↓	↑↓ Stmt Date ↑↓	↑↓ Payee ↑↓	↑↓ Credits ↑↓	↑↓ Debits ↑↓	↑↓ Balance ↑↓	↑↓ Amount ↑↓	↑↓ Pmt Type ↑↓
EXCEL	121205	05/13/2022		\$597.33	\$0.00	\$0.00	\$597.33	ACH

	↑↓ Stmt # ↑↓	↑↓ Chk # ↑↓	↑↓ Stmt Date ↑↓	↑↓ Payee ↑↓	↑↓ Credits ↑↓	↑↓ Debits ↑↓	↑↓ Balance ↑↓	↑↓ Amount ↑↓	↑↓ Pmt Type ↑↓
EXCEL	3655	215	04/15/2022		\$28,784.75	\$-9,136.33	\$0.00	\$19,648.42	Check





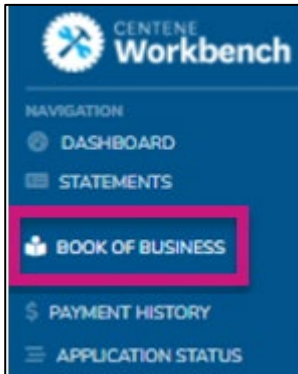
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Book of Business



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	MBI / Centene ID	Active Member	Broker NPN
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Effective From	Effective To	Termination From	Termination To	
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	
			SEARCH	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

SEARCH DOWNLOAD											
Search: <input type="text"/>											
Member MBI	Centene ID	First Name	Last Name	Phone	Effective Date	Termination Date	Contract	Plan	Mem Year	Broker NPN	Broker Name
					12/01/2021		H5294	010	2		
					01/01/2022		H5294	015	2		





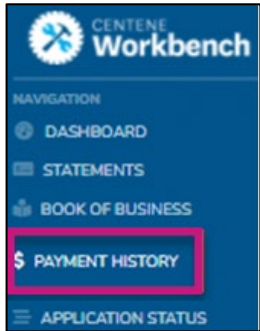
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Payment History



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

Payment History

Statement Date From: 02/01/2022 Statement Date To: 06/30/2022 MBI / Centene ID: Broker NPN: Payment Description: --

SEARCH **DOWNLOAD**

TOTAL SUM: \$111.13

MBI	Centene ID	Member Name	Broker NPN	Broker Name	Earnar	Earnar Name	Stmt #	Type	Description	Stmt Date	Pmt Type	Amount
-----	------------	-------------	------------	-------------	--------	-------------	--------	------	-------------	-----------	----------	--------





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Application Status



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

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

<div>SEARCHDOWNLOAD</div> <div>Search:</div>									
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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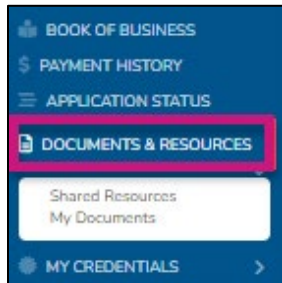
Documents & Resources



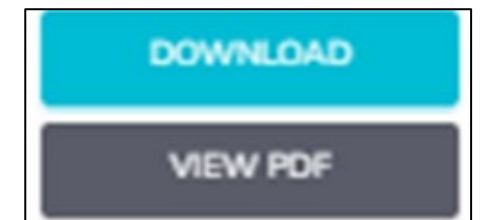
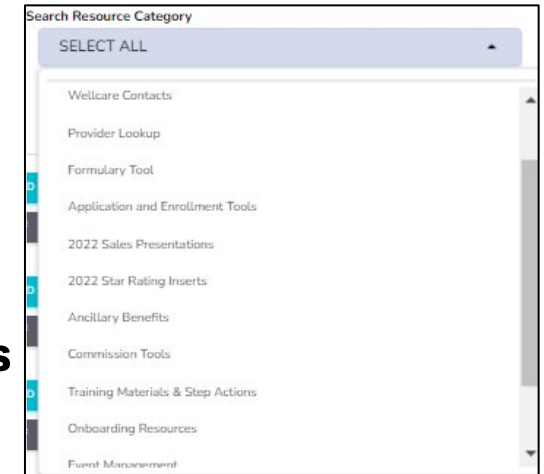
Document Resources

Shared Resources

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



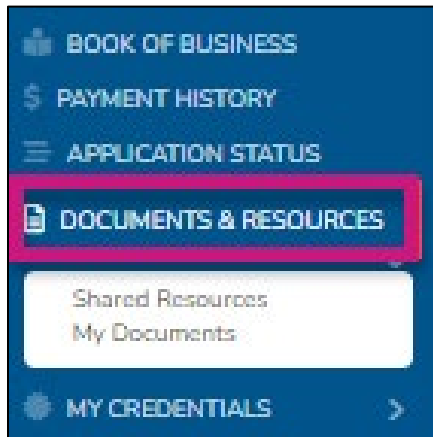
- Use the Search Resource Category option to look for specific document topics
- Use the open text Search field as an alternative
- If the resource is a PDF, view the document within the portal, or download it



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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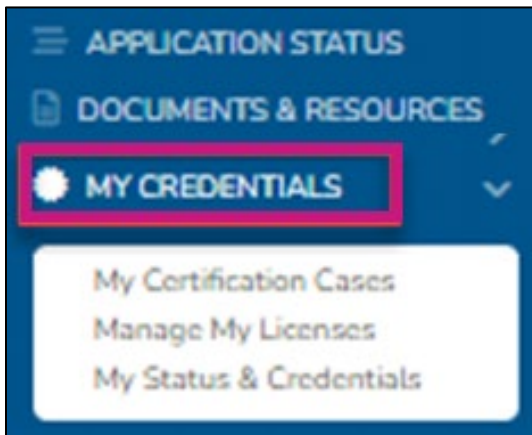
My Credentials



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.

Active States	Available States
<input checked="" type="checkbox"/> LA - Louisiana	<input type="checkbox"/> AR - Arkansas
<input checked="" type="checkbox"/> MO - Missouri	<input type="checkbox"/> TX - Texas
<input checked="" type="checkbox"/> MS - Mississippi	

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 & Credentials				
Search:				
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.

My Status & Credentials									
Search:									
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		
Showing 1 to 2 of 2 entries								PREVIOUS	NEXT

- 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.

My Status & Credentials

MY STATUS

LICENSE INFO

TRAINING INFO

CONTRACT INFO

APPOINTMENT INFO

Search:

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

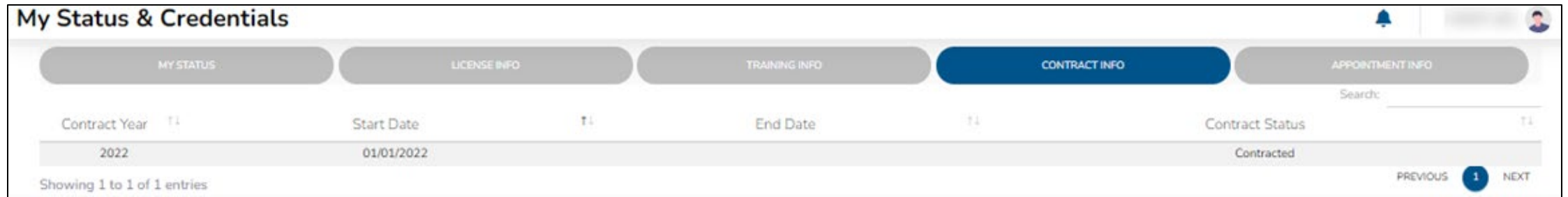
- Every year track progress through the Training Progress column
- Training Progress Percent Breakdown:
 - 25% = AHIP Only Completed
 - 50% = AHIP + ACT Journey Completed
 - 75% = AHIP + ACT Journey & Product Completed
 - 100% = AHIP + ACT Journey & Product + ACT Exam (Passed)



My Credentials

My Status & Credentials, Cont.

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



The screenshot shows a web interface titled "My Status & Credentials". It features a navigation bar with 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 the search bar is a table with four columns: "Contract Year", "Start Date", "End Date", and "Contract Status". The table contains one entry: "2022", "01/01/2022", and "Contracted". The "End Date" column is currently blank. At the bottom left of the table, it says "Showing 1 to 1 of 1 entries". At the bottom right, there are navigation links: "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.

My Status & Credentials

MY STATUS

LICENSE INFO

TRAINING INFO

CONTRACT INFO

APPOINTMENT INFO

Search:

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.

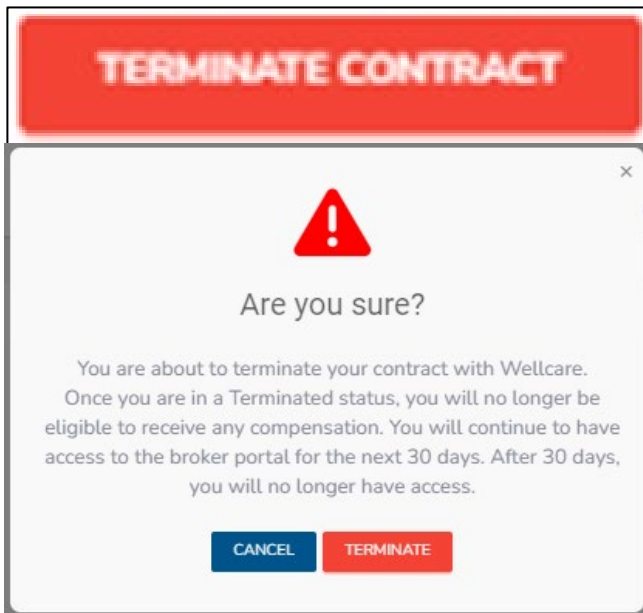
Note: Wellcare manages the appointments with each state. There is no action on your part. This tab is just for monitoring and tracking your credentials.



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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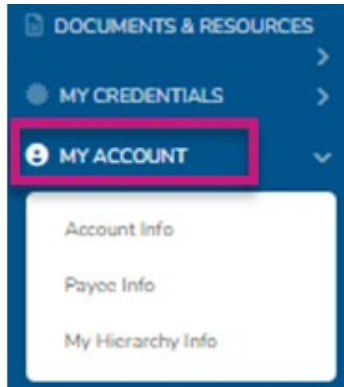
My Account



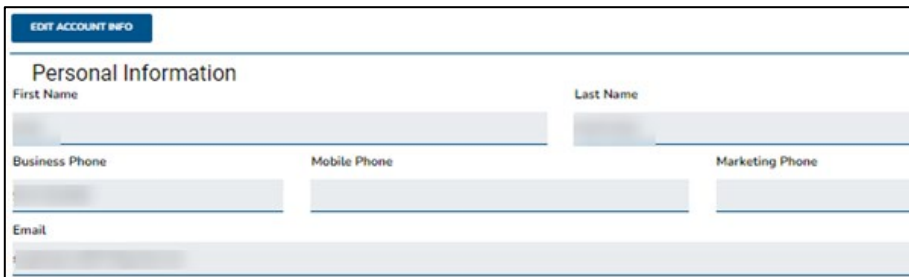
My Account

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 your email address

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'. Below this is a section for phone numbers with three input fields: 'Business Phone', 'Mobile Phone', and 'Marketing Phone'. At the bottom is an 'Email' input field. All input fields are currently empty.

Note: Name and Business Address is pulled directly from NIPR and cannot be changed as it must match your license.

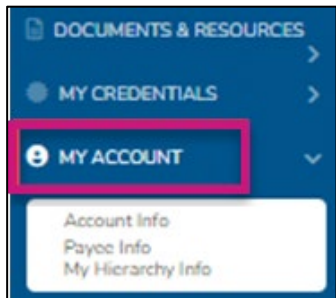
Confidential and Proprietary Information



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. You must complete this W9 update for your changes to be saved.

A screenshot of a web form titled 'EDIT PAYEE INFO'. The form is white with a blue header bar containing the title. It contains several input fields for payee information. The 'Name' field is a single line. The 'Address' field is a single line. The 'City' field is a single line. The 'State' field is a dropdown menu with 'TX' selected. The 'Zip' field is a single line. The 'SSN / TIN' field is a single line with a masked value '*****'.

EDIT PAYEE INFO			
Name		Address	
<input type="text"/>		<input type="text"/>	
City	State	Zip	SSN / TIN
<input type="text"/>	<input type="text" value="TX"/>	<input type="text"/>	<input type="text" value="*****"/>



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

EDIT PAYEE INFO

Name

Address

City

State

TX

Zip

SSN / TIN

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' tab. The 'W-9 Information' section includes a 'Taxation Type' dropdown menu, a checkbox for legal authorization, and a declaration statement. The 'Banking Information' section contains fields for 'Payment Method' (set to ACH), 'Account Type' (set to Checking), 'Account Number', 'Verify Account Number', 'Routing Number', and 'Financial Institution'. At the bottom, there are 'ABORT' and 'CONTINUE' buttons.

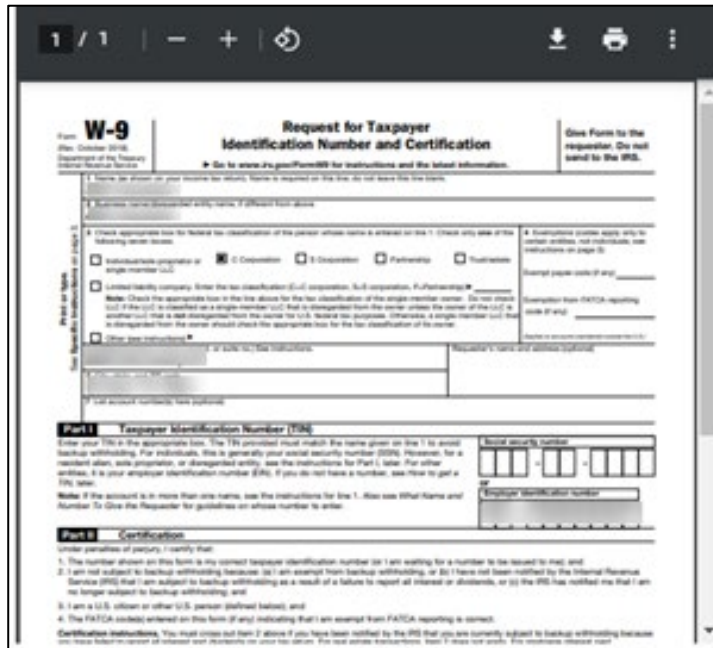
PAYMENT INFORMATION		W9 FORM
W-9 Information		
Taxation Type *	--	
<input type="checkbox"/>	I declare that I am legally authorized to execute contracts and agreements on behalf of myself or the legal entity I represent. *	
Banking Information		
Payment Method	ACH (Direct Deposit)	
Account Type *	Checking	
[?] Account Number: *	*****	👁
Verify Account Number *	*****	👁
[?] Routing Number: *		
Financial Institution *		
ABORT		CONTINUE



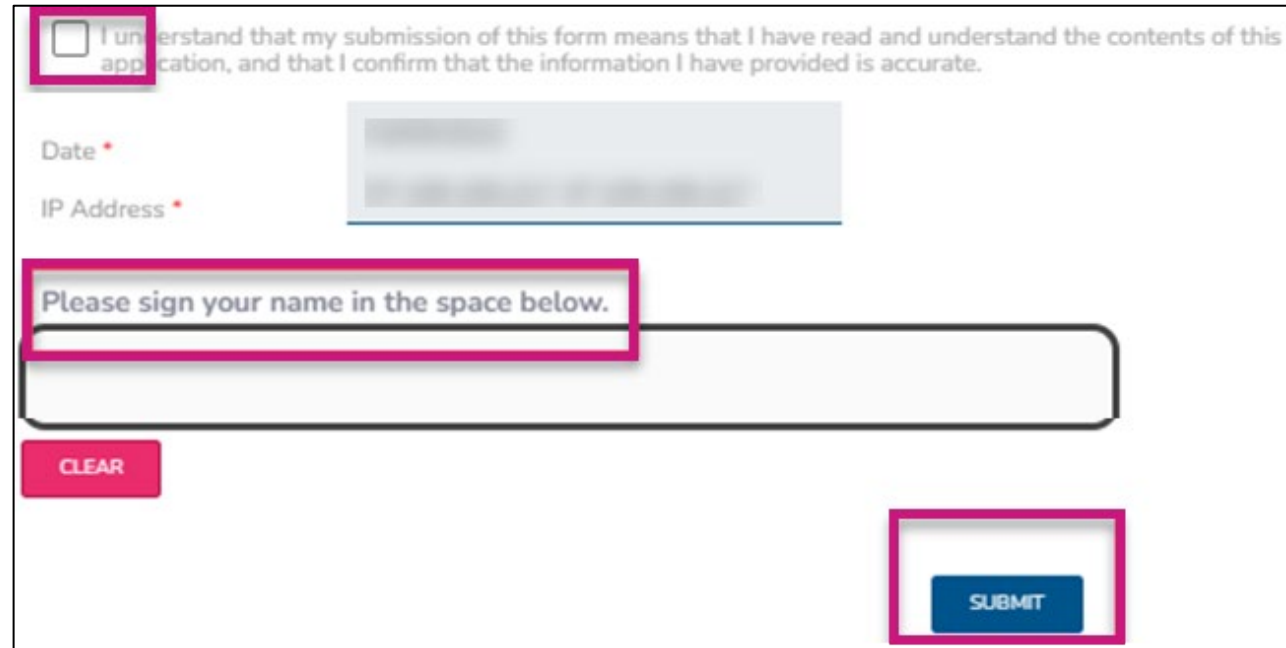
My Account

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



The image shows a PDF of Form W-9, 'Request for Taxpayer Identification Number and Certification'. The form is titled 'Form W-9' and 'Request for Taxpayer Identification Number and Certification'. It includes instructions for the filer to provide accurate information and a section for the filer to sign and date the form. The form is divided into two main parts: 'Part I Taxpayer Identification Number (TIN)' and 'Part II Certification'. Part I includes fields for the filer's name, address, and TIN. Part II includes a certification statement and a signature line.



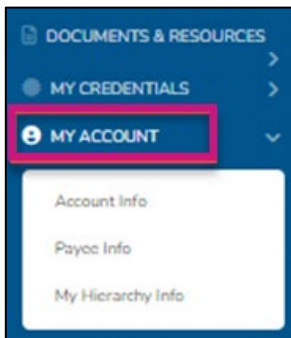
The image shows a digital interface for signing and submitting the form. It includes a checkbox for 'I understand that my submission of this form means that I have read and understand the contents of this application, and that I confirm that the information I have provided is accurate.' Below this is a 'Date' field and an 'IP Address' field. A large text box is labeled 'Please sign your name in the space below.' with a 'CLEAR' button. At the bottom right is a 'SUBMIT' button.



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.



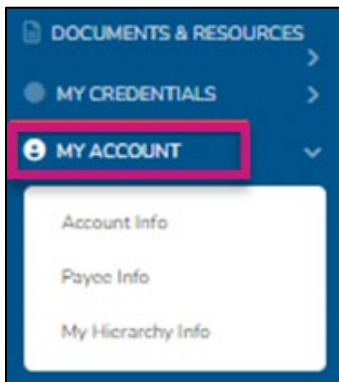
- Select the Edit Banking Info button and the fields will become editable to make changes.
- Uncheck the Hide Information box and the Account/Routing Numbers will become visible.

A screenshot of a web form titled 'EDIT BANKING INFO'. The form has a blue header bar with the title. Below the header, there is a 'Banking Method' dropdown menu set to 'ACH'. Below this, there are three input fields: 'Account Number', 'Verify Account Number', and 'Routing Number'. Each field contains a series of dots, indicating masked input. Below these fields, there are two more input fields: 'Financial Institution' (set to 'Bank of America') and 'Account Type' (set to 'CHECKING'). At the bottom of the form, 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
CHANGE		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

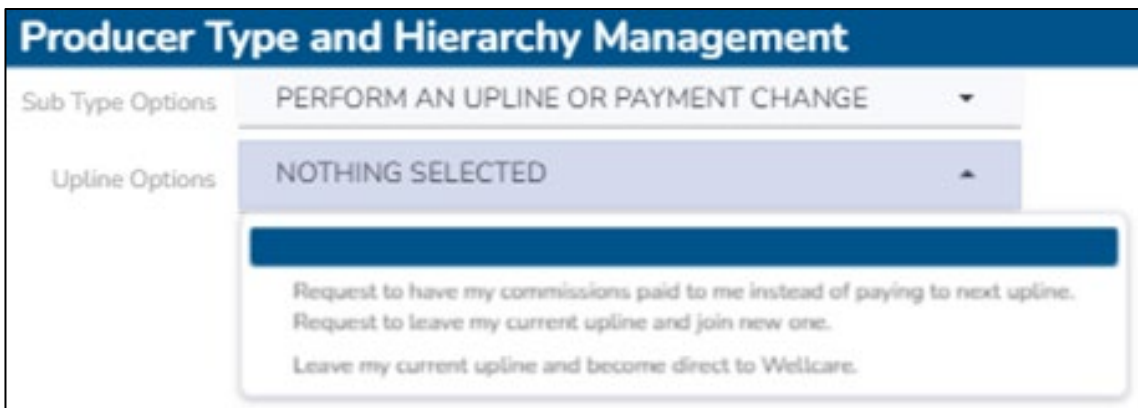
Note: The options available will be dependent on current subtype



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 you currently have an upline, your request to join a new upline or become Direct to Wellcare will go into effect 14 days after approval
- If a request to go Direct to Wellcare is selected, the request will be automatically approved
 - If the previous subtype was Dual Assignment, it will also be required to complete a W9 and provide ACH information
- You can track the status of your hierarchy change under the Workflows menu item.



The screenshot shows a web form titled "Producer Type and Hierarchy Management". It contains two main sections: "Sub Type Options" and "Upline Options". The "Sub Type Options" dropdown is currently set to "PERFORM AN UPLINE OR PAYMENT CHANGE". The "Upline Options" dropdown is currently set to "NOTHING SELECTED". A dropdown menu is open below "Upline Options", showing three options: "Request to have my commissions paid to me instead of paying to next upline.", "Request to leave my current upline and join new one.", and "Leave my current upline and become direct to Wellcare."



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 displays two screenshots of the 'Producer Type and Hierarchy Management' form. The top screenshot shows the 'Upline Options' dropdown menu open, with options: 'REQUEST TO LEAVE MY CURRENT UPLINE AND JOIN', 'I will get paid my commissions.', and 'I pay my commissions to my upline.'. The bottom screenshot shows the 'Next Upline' field and a red 'UPDATE' button highlighted with a red box.



My Account

My Hierarchy Info – Make Changes, Cont.

- Select Update, then confirm to submit this request to the new proposed upline
- Once the request is submitted, your current hierarchy line will update to Request Pending, and you will not be able to submit additional changes
- 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 14 days after approval
- If they deny, your current hierarchy information will remain active. You will then be able to submit a new change request
- 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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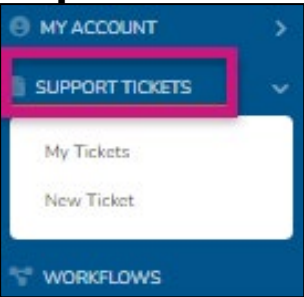
Support Tickets



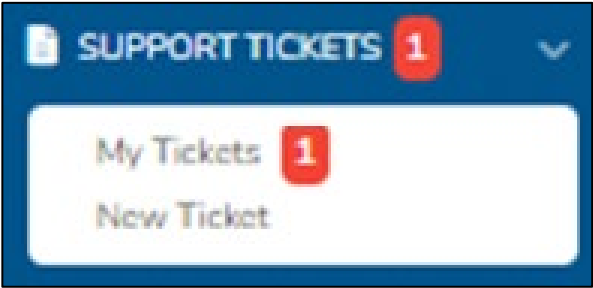
Support Tickets

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			
		--	--	--			
		SEARCH					
Ticket	Type	Subtype	Description	Status	Date Created	Last Updated	Updated By
Ticket 615	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	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	Member Related Inquiry	Member Status Inquiry	What is the status of M. Smith? MBI: XXXXXXXXX	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.

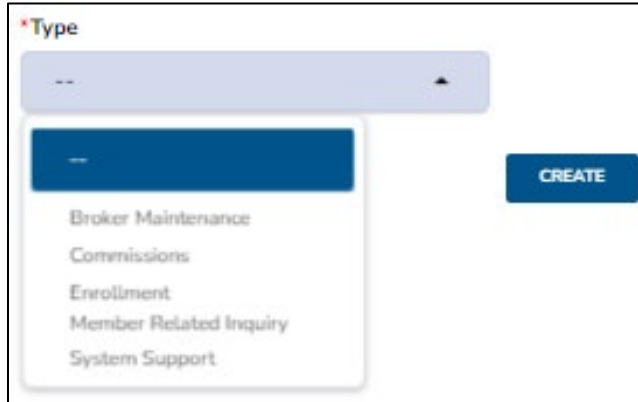
Status	Status Meaning
Resolved	Your inquiry has been worked and is resolved. The ticket is closed.
Pending Resolver	Your inquiry has been submitted and is in the queue to be assigned to a Sales Support rep.
Pending Broker Response	Sales Support requires additional information from you to resolve your 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

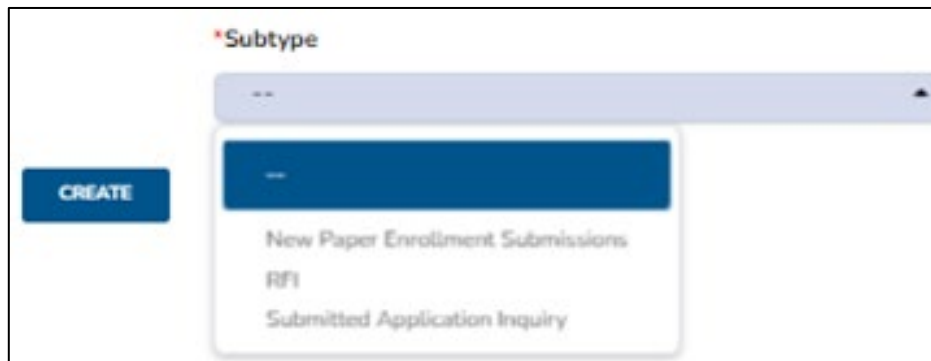
New Ticket

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



A screenshot of a web form titled "New Ticket". The form has a label "*Type" above a dropdown menu. The dropdown menu is open, showing a list of options: "Broker Maintenance", "Commissions", "Enrollment", "Member Related Inquiry", and "System Support". To the right of the dropdown menu is a blue button labeled "CREATE".

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



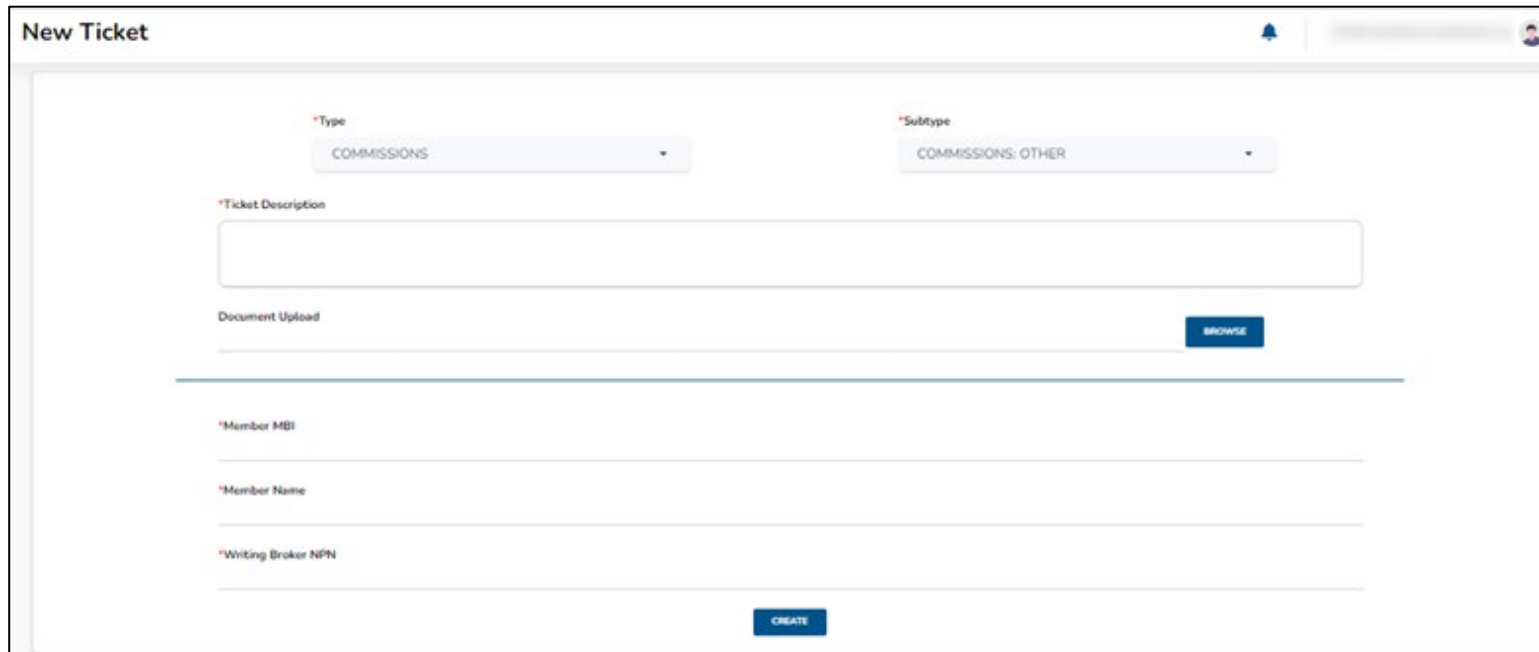
A screenshot of a web form titled "New Ticket". The form has a label "*Subtype" above a dropdown menu. The dropdown menu is open, showing a list of options: "New Paper Enrollment Submissions", "RFI", and "Submitted Application Inquiry". To the left of the dropdown menu is a blue button labeled "CREATE".



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 area for entering details.
- Document Upload:** A section with a "BROWSE" button for uploading documents.
- *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 to submit the ticket.





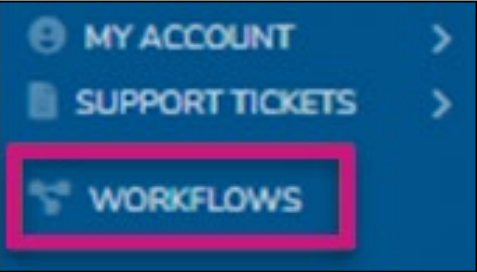
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Workflows



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**
- **Cancel hierarchy change requests**

Status

Type

SEARCH

Type	↑↓	Status	↑↓	Requestor	↑↓	Approver	↑↓	Last Updated
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Questions?

