Centene Workbench Training

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How To Access Centene Workbench?

wellcare™

Centene Workbench can be accessed through Single Sign-On (SSO) / Ping-One portal with your existing credentials.

https://desktop.pingone.com/cnc-workbench-brk

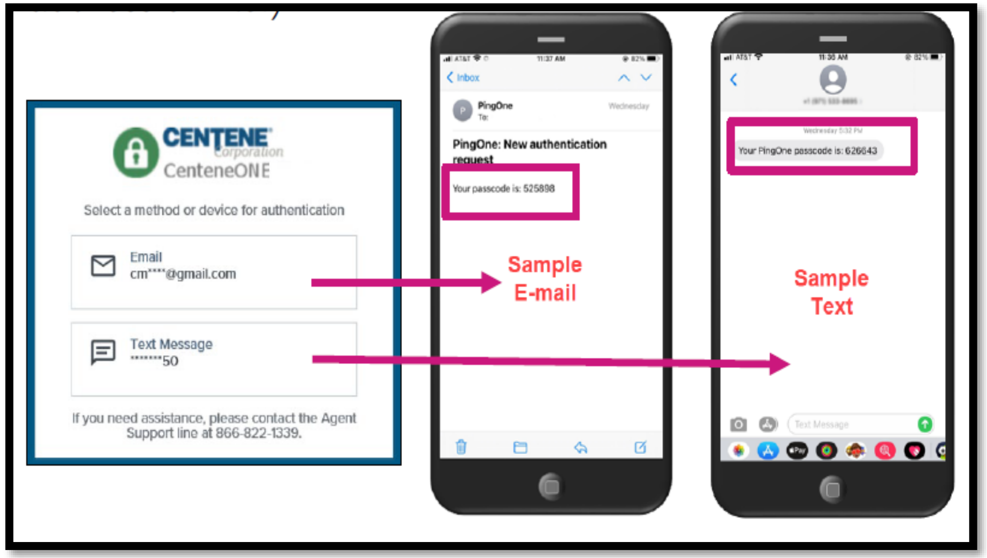
Type your NPN in the Username Field.
If you don't know the password, please use 'Forgot Password'.

Helpful Tips! The SSO portal works best in Google Chrome, Firefox, and Microsoft Edge. It is recommended to clear the browser cache prior to accessing the portal.

If you need assistance, please contact the Agent Support Line at 866-822-1339

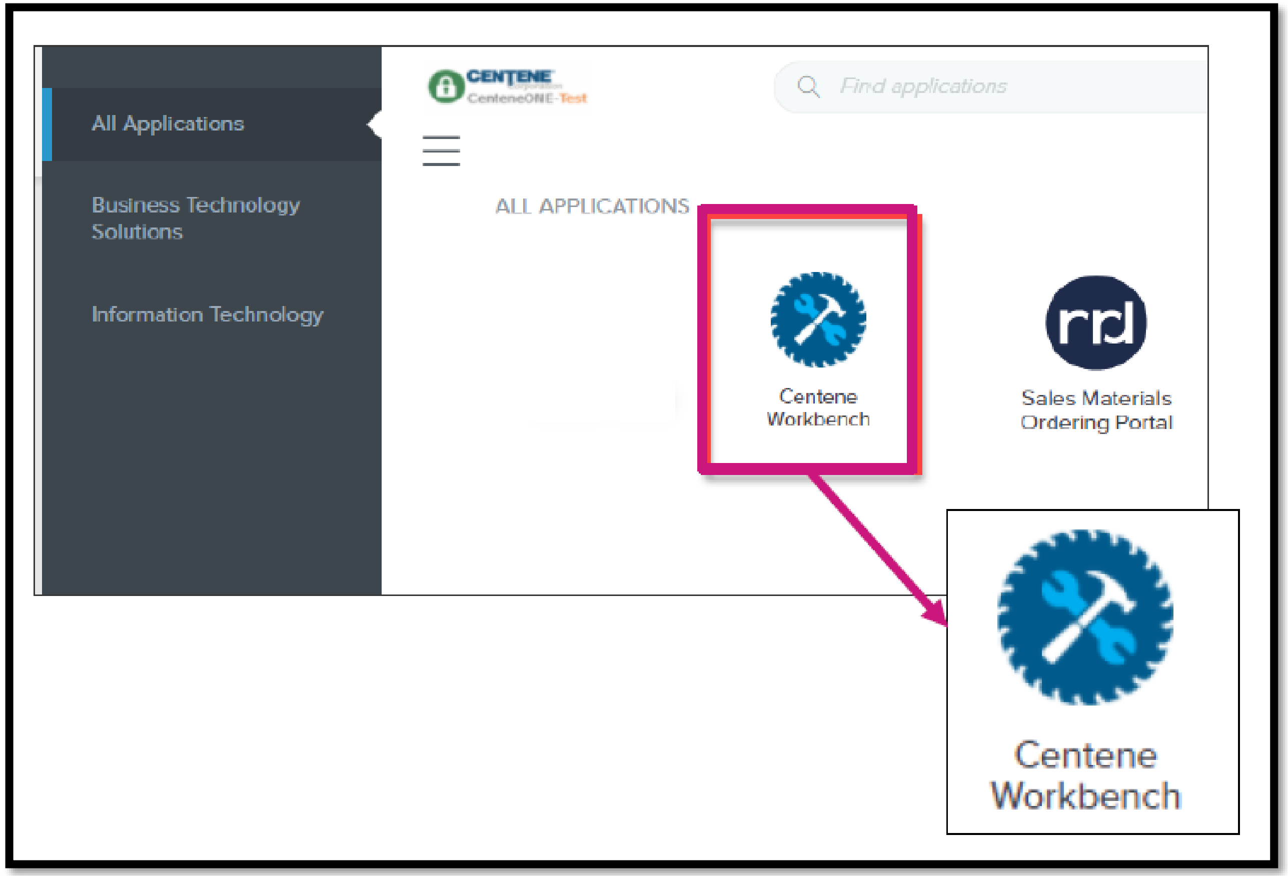
Authentication Process is necessary to log-in. If you have both an email and a cell phone number on file, an authentication option screen will appear.
Select the Email option or the Text Message option, based on your preference.

When the authentication code entry screen appears, type the code you received via email or text in the Passcode field to ‘Sign on’.



After logging in, you will be routed to the PingOne Single Sign-On Portal.

Explore and access applications like Centene Workbench (New Broker Portal) and **Custom Point (Sales Materials Ordering Portal)** to leverage the tools and support you need.



Callidus (Agent Connect) is also available on this platform if you need to look-up commission statements prior to 04/05/2022.

Dashboard

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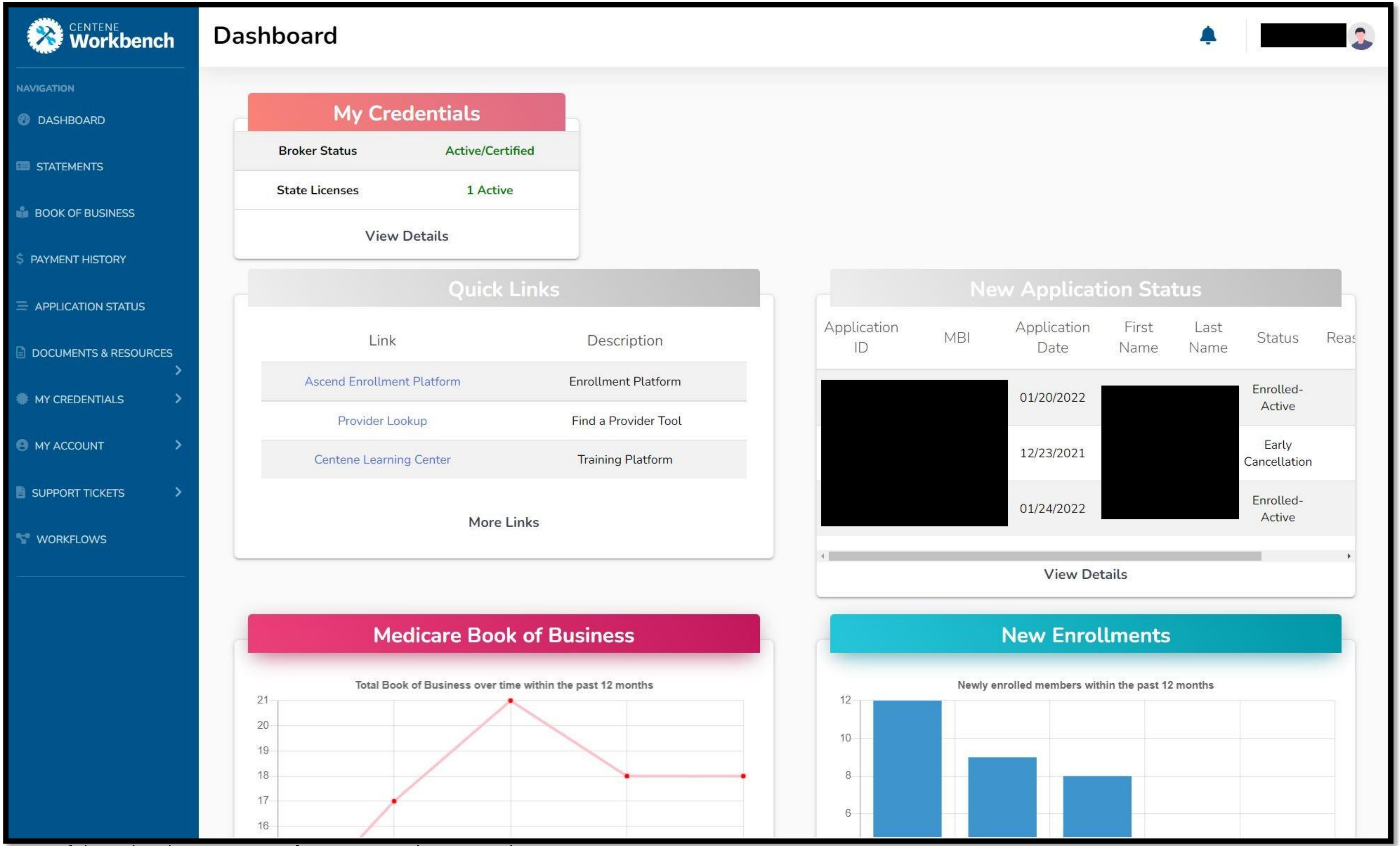
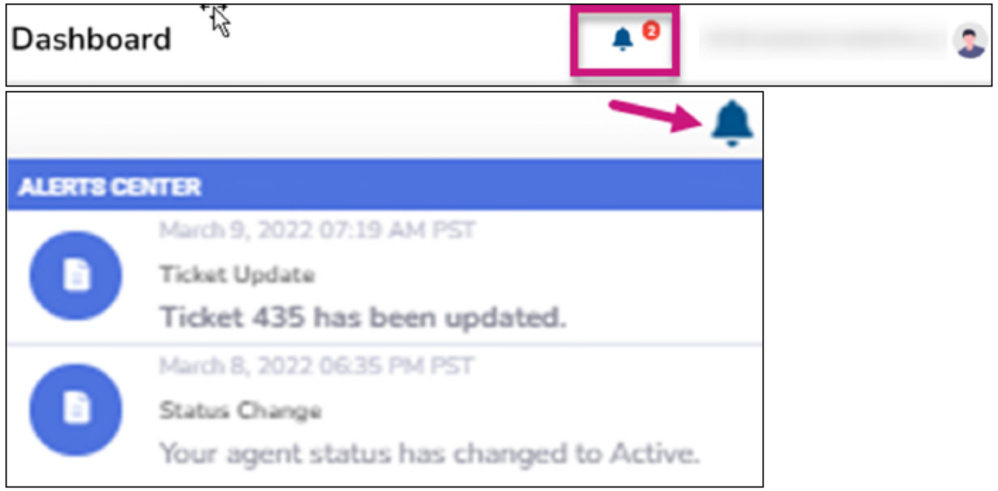

CENTENE
Workbench
Dashboard
[redacted]
NAVIGATION
DASHBOARD
STATEMENTS
BOOK OF BUSINESS
PAYMENT HISTORY
APPLICATION STATUS
DOCUMENTS & RESOURCES
MY CREDENTIALS
MY ACCOUNT
SUPPORT TICKETS
WORKFLOWS
My Credentials
Broker Status
Active/Certified
State Licenses
1 Active
View Details
Quick Links
Link
Description
Ascend Enrollment Platform
Enrollment Platform
Provider Lookup
Find a Provider Tool
Centene Learning Center
Training Platform
More Links
New Application Status
Application ID
MBI
Application Date
First Name
Last Name
Status
Reas
[redacted]
01/20/2022
[redacted]
Enrolled-Active
12/23/2021
Early Cancellation
01/24/2022
Enrolled-Active
View Details
Medicare Book of Business
Total Book of Business over time within the past 12 months
21
20
19
18
17
16
New Enrollments
Newly enrolled members within the past 12 months
12
10
8
6

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

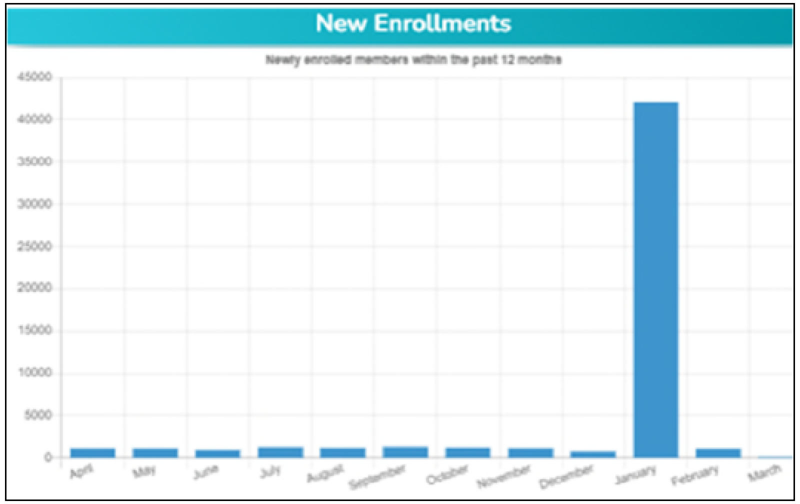


Widgets

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

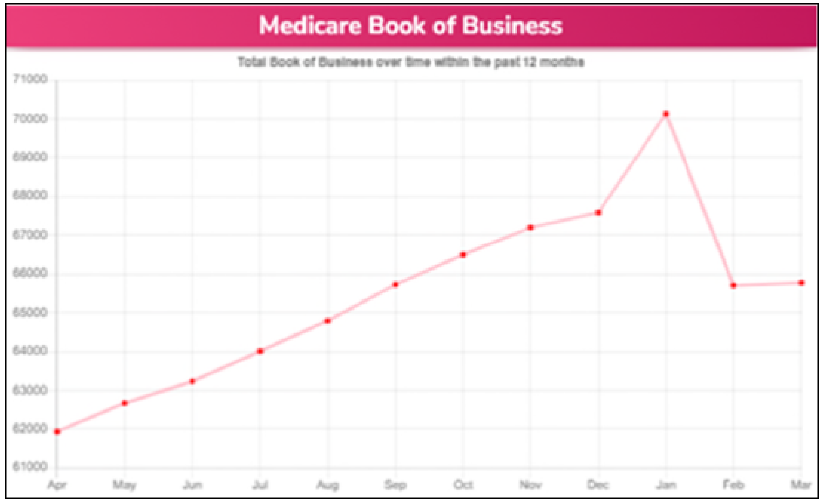
New Enrollments

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



Medicare Book of Business

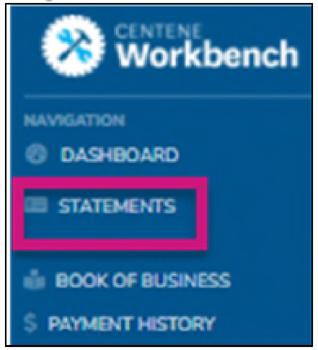
Provides a summary of the total book of business over a 12-month period



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
- Once a statement has been sent to AP and paid, the following columns will update and populate:
    - Payment Type
    - Payment Date
    - Payment ID

Statements

[redacted]

	Stmt #	Stmt Date	Payee	Credits	Debits	Balance	Amount	Pmt Date	Pmt Type
Excel	[redacted]	04/15/2022	[redacted]	$958.67	$0.00	$0.00	$958.67	04/27/2022	ACH
Excel	[redacted]	04/22/2022	[redacted]	$537.00	$0.00	$0.00	$537.00	05/03/2022	ACH
Excel	[redacted]	04/29/2022	[redacted]	$2,924.67	$0.00	$0.00	$2,924.67		ACH
Excel	[redacted]	05/06/2022	[redacted]	$0.00	$-79.75	$0.00	$-79.75		Negative

Click ‘Excel’ to download the statement in excel file.

A	B	C
Payee Name	[redacted]	
Payee NPN		
Statement Date		
Description	Member Count	Total
Initial Enrollments	22	$6,527.25
Renewal Enrollments	0	$0.00
Rapid Disenrollments	1	-$715.00
Disenrollments	0	$0.00
Legacy	0	$0.00
Miscellaneous	5	$686.50
Balance		$0.00
TOTAL	28	$7,185.25

Summary | Detail | Legacy | Misc

Details:

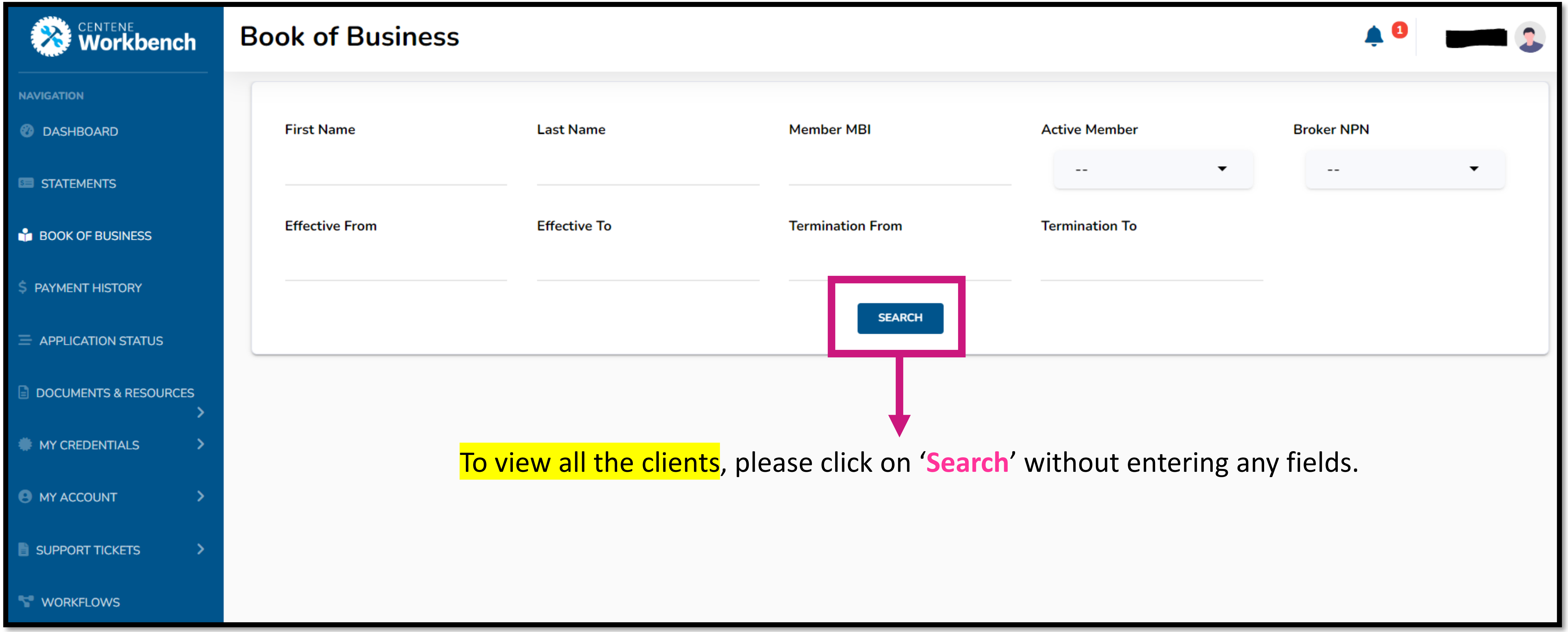
Payment Type (New to CMS or not)
Pay Period
Pay Amount
Member Name
Signed Date
Effective Date
Cycle Year
Prior Plan Type
Plan Type
Plan Name
Original Effective Date

MISC:

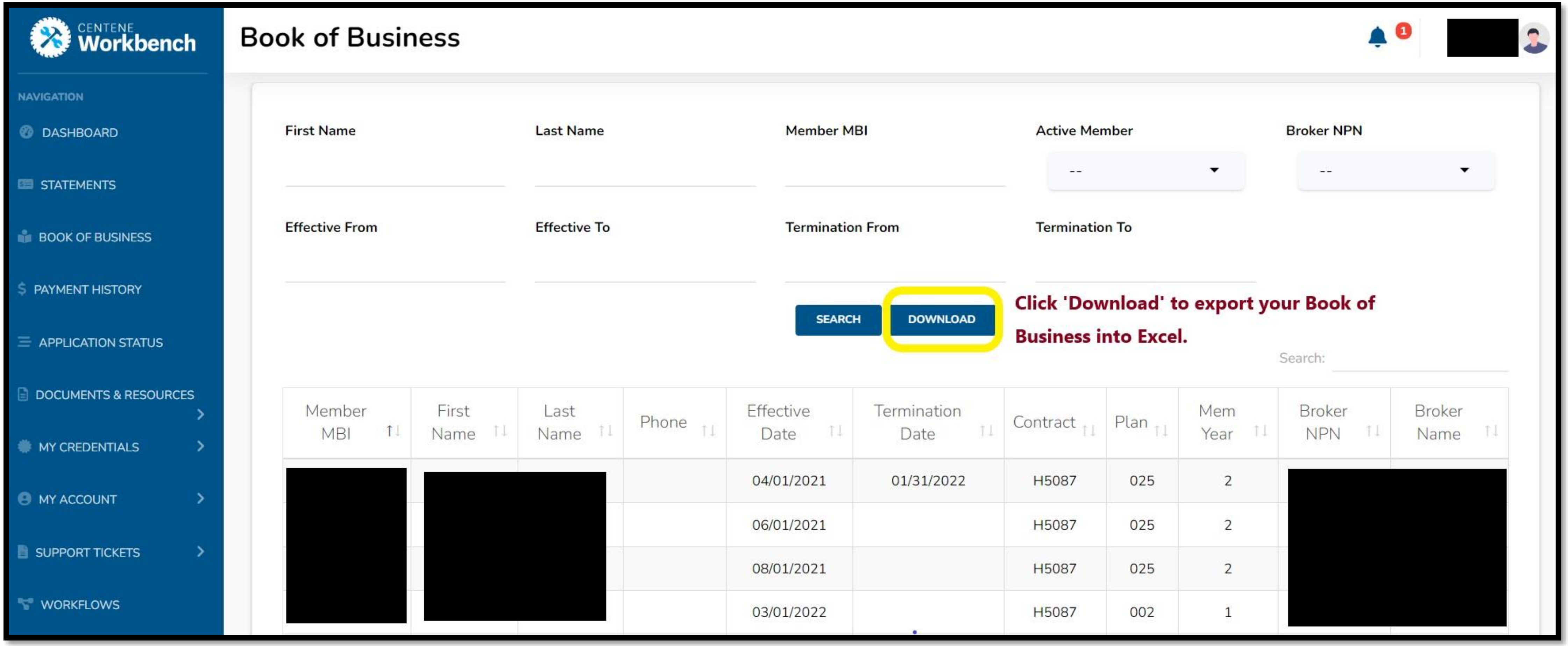
HRA/VBE Payments
Manual Adjustments

Book of Business

Enter one of the below filters to look for a specific member, or members who fall under specific categories.



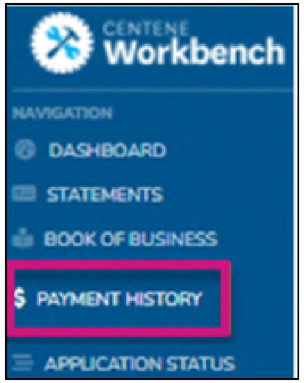
To view all the clients, please click on '**Search**' without entering any fields.



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

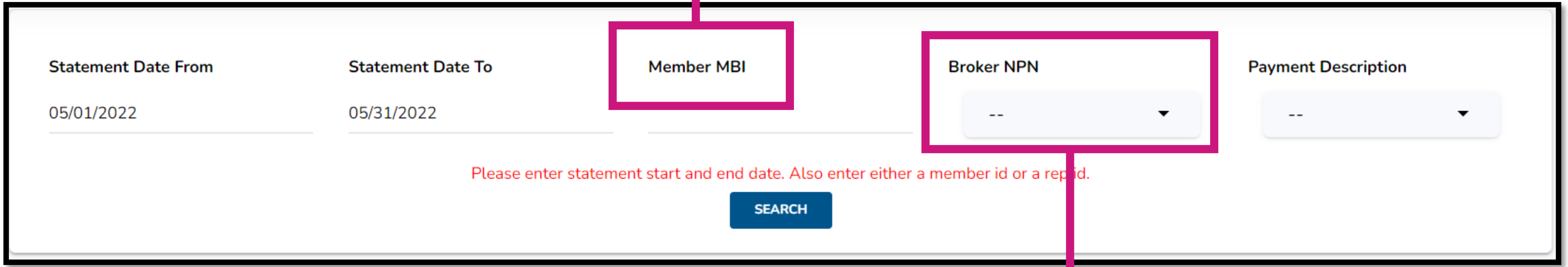
Payment History

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

Fill in Member MBI to look for a specific member's commission.

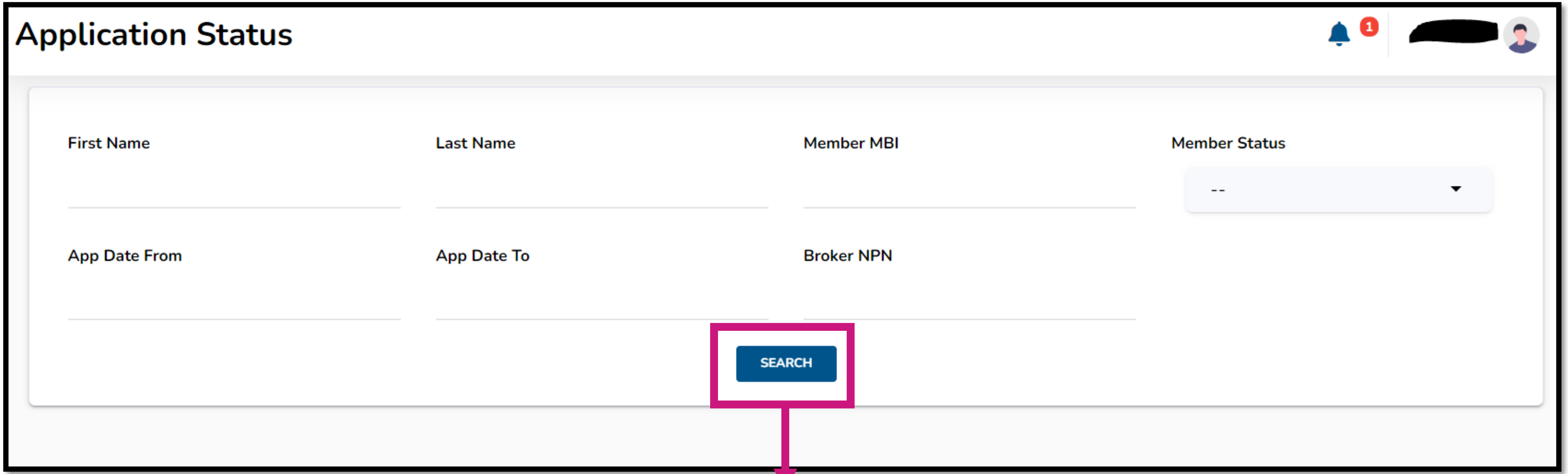


Select your NPN to look for all payments made during the time period (you have selected).

Note: All payments prior to Workbench launching date cannot be found here.
Please go to Agent Connect (the previous Broker Portal) to find out payments before 04/05/2022.

Application Status

Application Status allows tracking of all submitted applications where you are the BOR (Broker of Record). Use any of the below search fields to narrow down your generated results.



To view all the recently submitted applications, please click on '**Search**' without entering any fields.

Application Status

[redacted]

wellcare

First Name

Last Name

Member MBI

Member Status

--

App Date From

App Date To

Broker NPN

SEARCH DOWNLOAD

Search:

App ID	Member MBI	App Sign Date	Effective Date	First Name	Last Name	Status	Broker NPN	Broker Name
[redacted]	[redacted]	12/30/2012	01/01/2018	[redacted]	[redacted]	Rejected	[redacted]	[redacted]
[redacted]	[redacted]	12/17/2020	01/01/2021	[redacted]	[redacted]	Enrolled-Active	[redacted]	[redacted]
[redacted]	[redacted]	12/30/2012	01/01/2018	[redacted]	[redacted]	Rejected	[redacted]	[redacted]
[redacted]	[redacted]	08/11/2013	01/01/2018	[redacted]	[redacted]	Enrolled-Termed	[redacted]	[redacted]
[redacted]	[redacted]	12/02/2019	01/01/2020	[redacted]	[redacted]	Enrolled-Active	[redacted]	[redacted]
[redacted]	[redacted]	12/02/2019	01/01/2020	[redacted]	[redacted]	Enrolled-Active	[redacted]	[redacted]
[redacted]	[redacted]	12/04/2019	01/01/2020	[redacted]	[redacted]	Enrolled-Active	[redacted]	[redacted]
[redacted]	[redacted]	12/04/2019	01/01/2020	[redacted]	[redacted]	Enrolled-Active	[redacted]	[redacted]

Member Status:

1 Month RDE (Rapid Disenrollment)
2 Month RDE (Rapid Disenrollment)
3 Month RDE (Rapid Disenrollment)
Current Member
Duplicate
Early Cancellation (Cancel prior to effective date)
Enrolled – Active
Enrolled – Termed
Enrolled by Other Agent
Future Enroll
Future Disenroll
Pending Review
Plan Change
Rejected
Rejected (enrolled in another plan)
RFI – Missing SNP Verification (Needs to verify CSNP or DSNP)
RFI – No Permanent Address in our Service Area
RFI – No Permanent Address on Application
RFI – No Part A and/or Part B
RFI – No Signature
RFI – Election Type Not Found
RFI – HICN Not Found

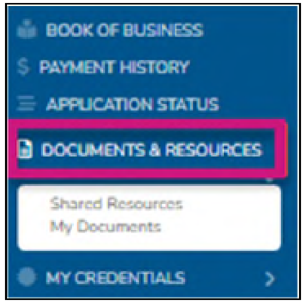
To submit response to an RFI :

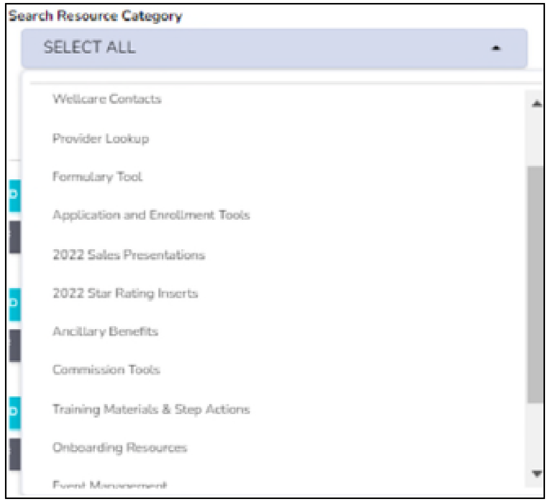
Contact Broker Support (866-822-1339)
Submit Service Ticket in Workbench
Contact Regional Agency Manager

Documents & Resources

Shared Resources

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

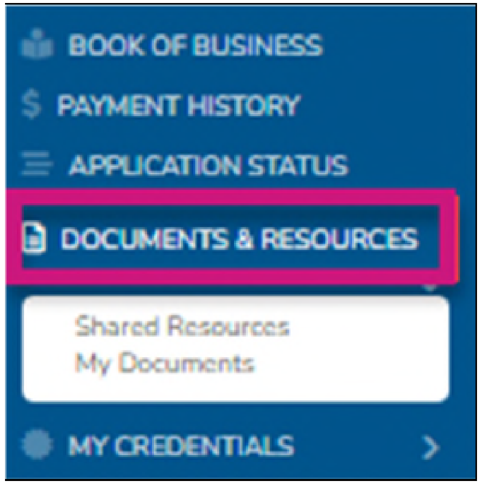




- Use the **Search Resource Category** option to look for specific document topics
- Use the open text Search field as an alternative
- If the resource is a PDF, view the document within the portal, or download it.

My Documents

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

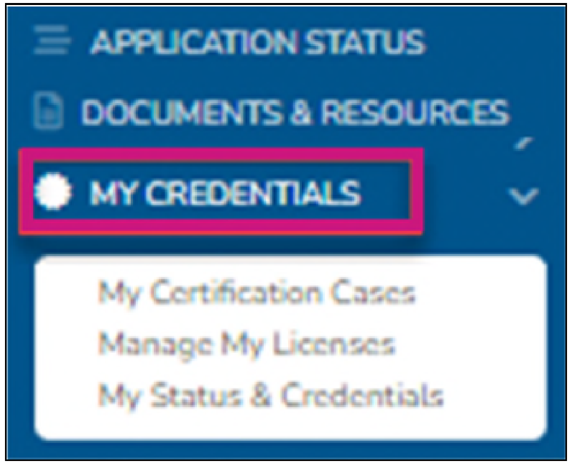


- Documents will include a copy of your Wellcare contract, W9s, any contract addendums that may be required in the future, etc.

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

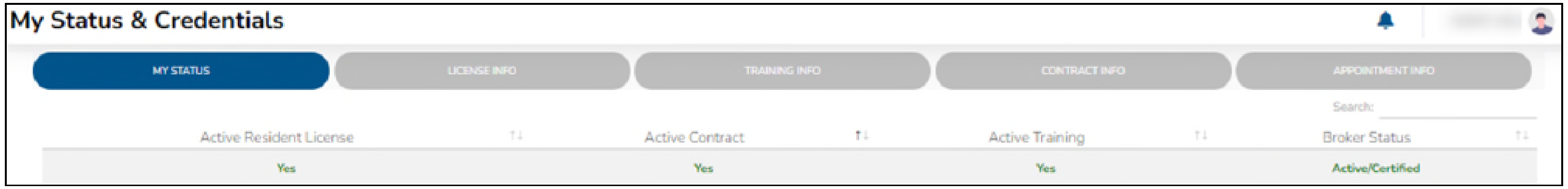
Note: If onboarding was through the old broker management system, no onboarding cases will be available at this time.

Manage My Licenses

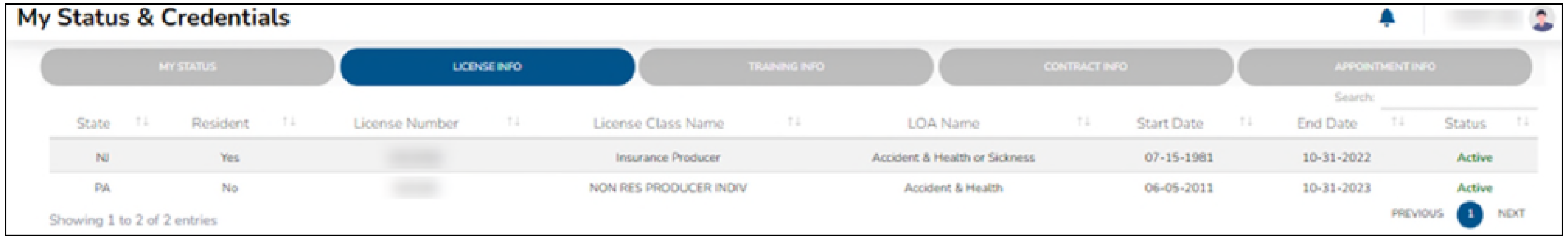
- Active States displays which states you are currently approved to market/sell Wellcare plans
- Available States displays additional states that are available for you to add to your profile
  - After completing selecting a state (s), select the **Add Selected State** button to save your changes
  -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

My Status & Credentials

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



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



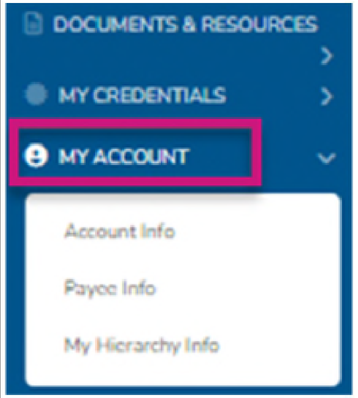
- Displays if the license is Resident or Non-Resident, the state of the license, the license number, the class and LOA name, the effective date and expiration dates, and the overall status of that license

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.

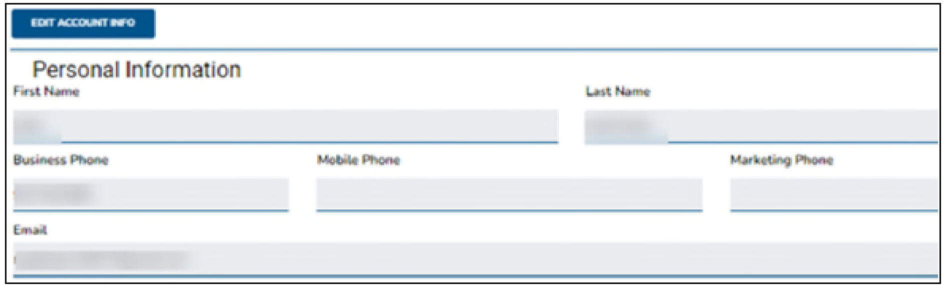
My Account

Account Info – Personal Information

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



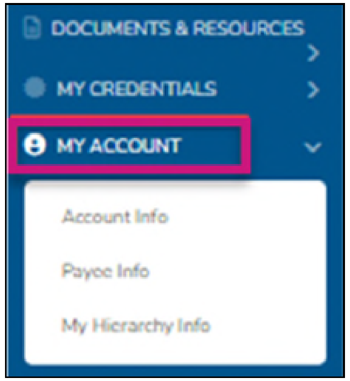
- By selecting **Edit Account Info** you can update your phone number, add a marketing phone number, and/or update your email address



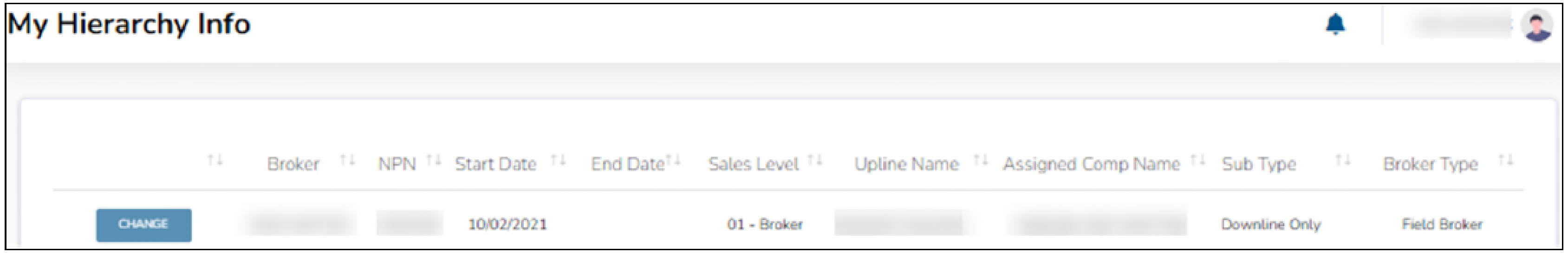
Note: Name and Business Address is pulled directly from NIPR and cannot be changed as it must match your license.

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 – Make Changes

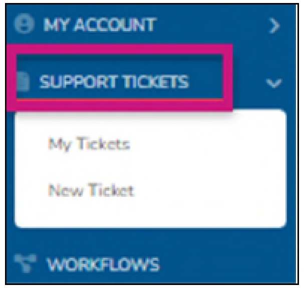
- Once the Change button has been selected, a new window will open
- The summary of the current situation will populate to confirm the current set up
- Select the **Perform an Upline or Payment Change** option from the drop-down menu
- Select from the following options:
  - Request to have my commissions 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

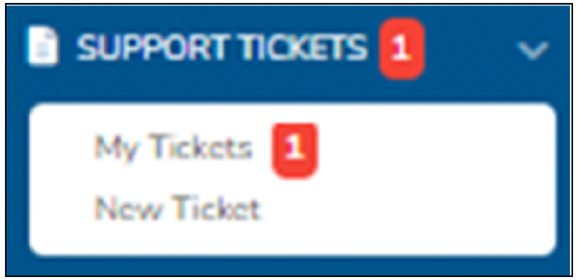
Support Tickets

My Tickets

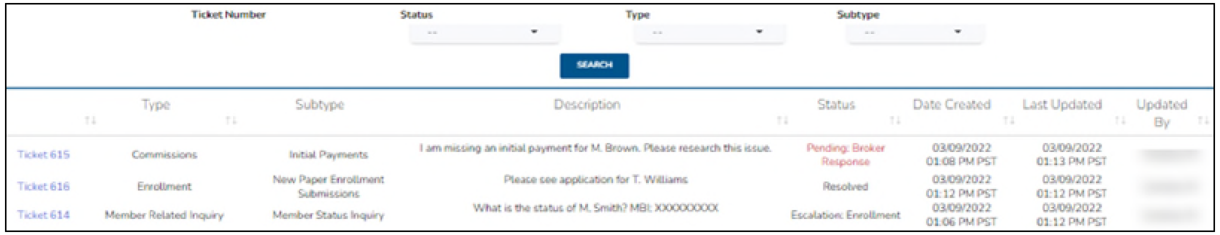
The My Tickets tab allows the tracking of the status and responses on all inquiries submitted.



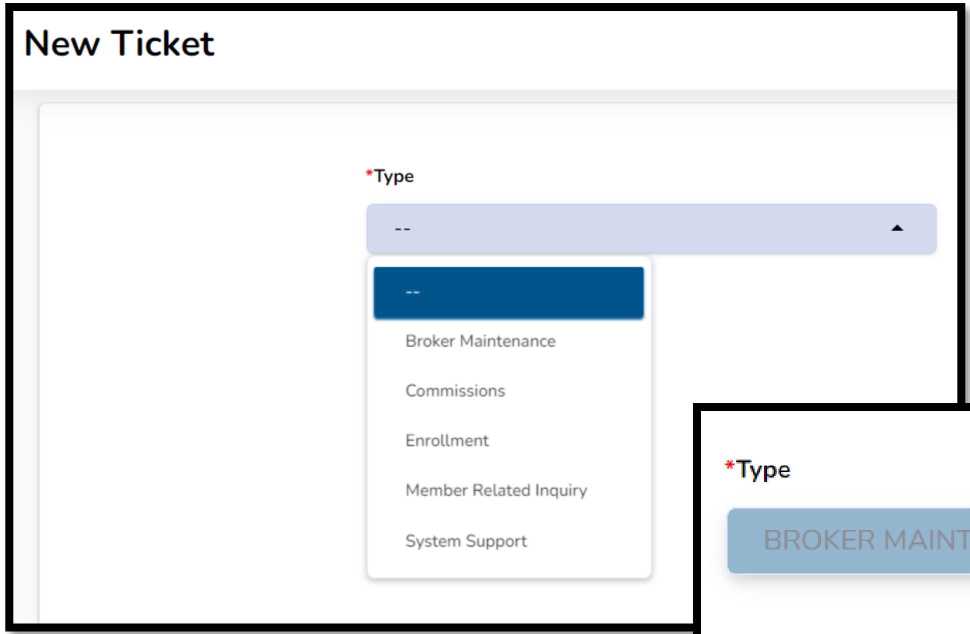
- If there is an action item, there will be a red number next to My Tickets

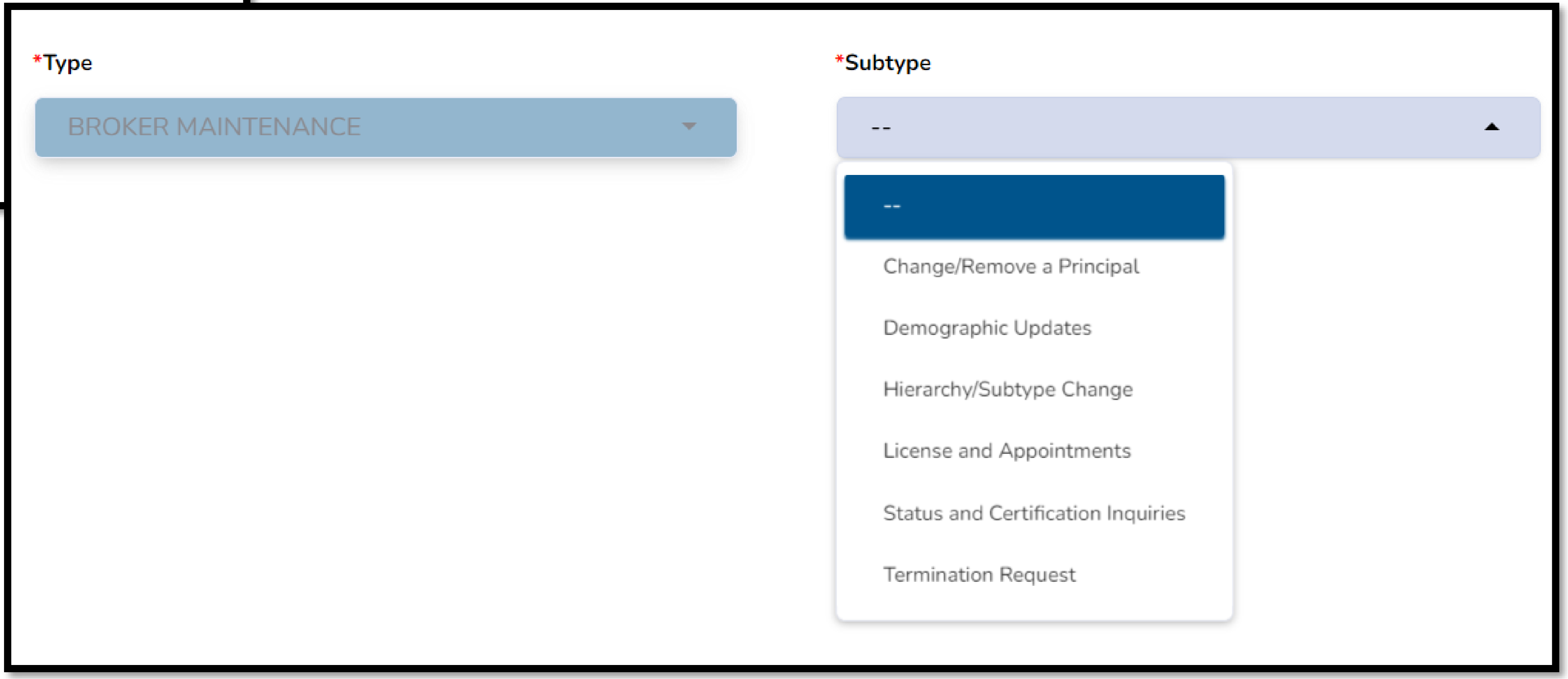


- Use the following criteria to filter down the results: Ticket Number, ticket status, ticket type, and ticket subtype
- Tickets will automatically be filtered to show any **Pending Broker Response** tickets at the top



	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	


New Ticket
*Type
--
--
Broker Maintenance
Commissions
Enrollment
Member Related Inquiry
System Support


*Type
BROKER MAINTENANCE
*Subtype
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Change/Remove a Principal
Demographic Updates
Hierarchy/Subtype Change
License and Appointments
Status and Certification Inquiries
Termination Request

Type (Main Drop-down)

Broker Maintenance
Commissions
Enrollment
Member Related Inquiry
System Support

Change/Remove a Principal
Demographic Updates
Hierarchy / Subtype Change
License and Appointments
Status and Certification Inquiries
Termination Request

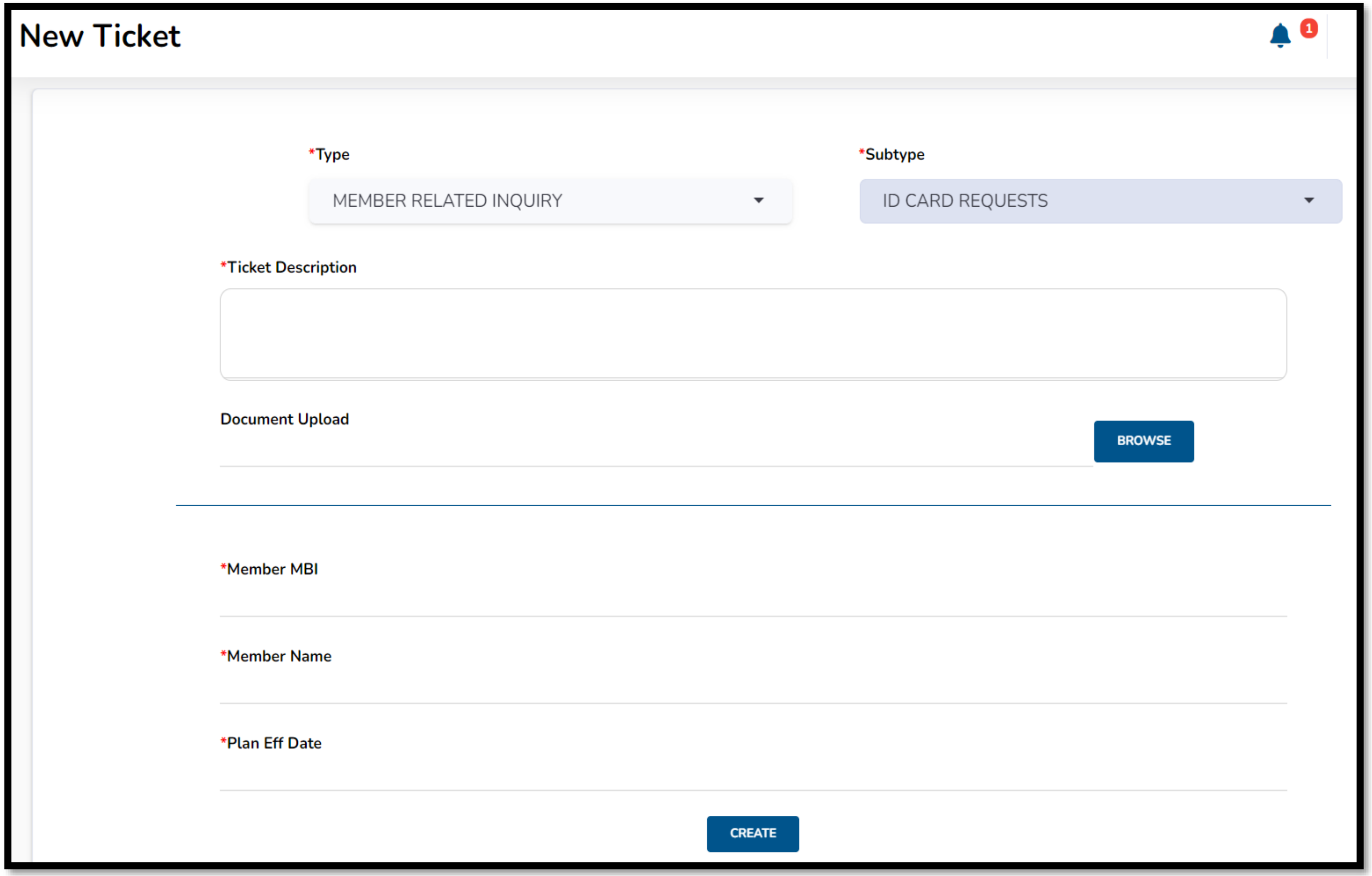
1099 Tax Forms
Book of Business Transfer Request
Broker of Record Changes
Commissions: Other
Hierarchy Overrides
Initial Payments
Missing Deposit/Check
Renewal Payments
Statements
VBE (HRA) Payments

New Paper Enrollment Submissions
RFI
Submitted Application Inquiry

ID Card Requests
Member Billing Escalations
Member Status Inquiry
Other

Ascend
Centene Learning Center
Centene Workbench Portal
Custom Point
Single Sign On

- Every ticket type requires a description
- 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



Questions?