



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


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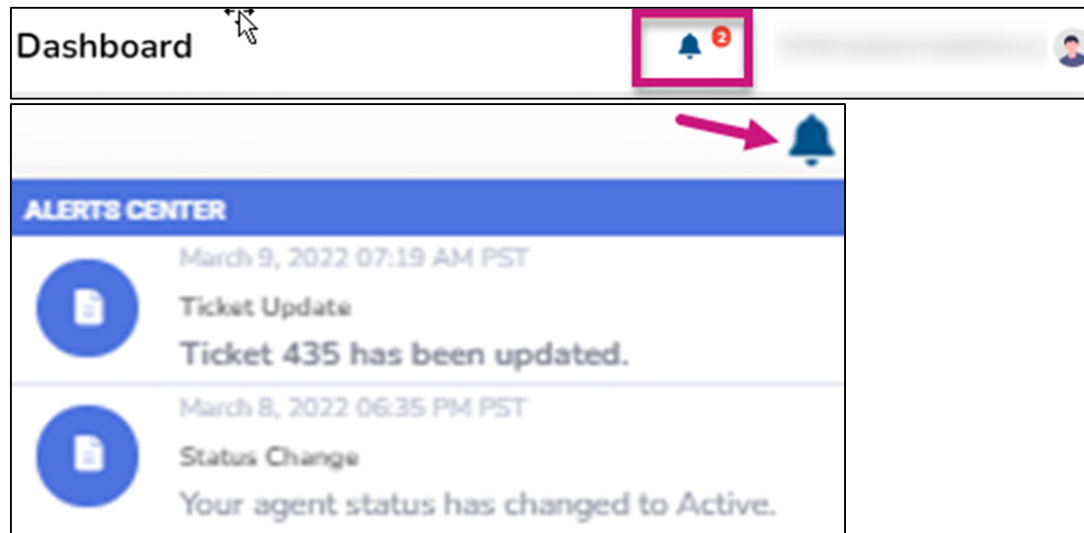
Dashboard



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	



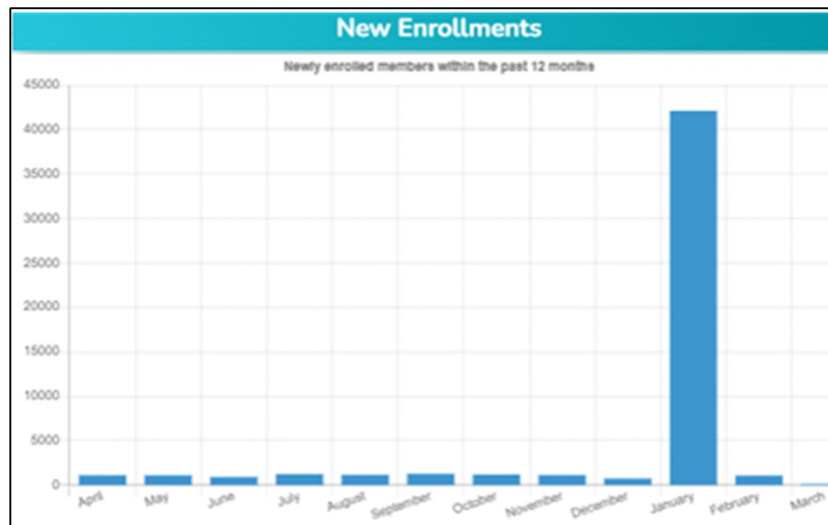
Dashboard

Widgets

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

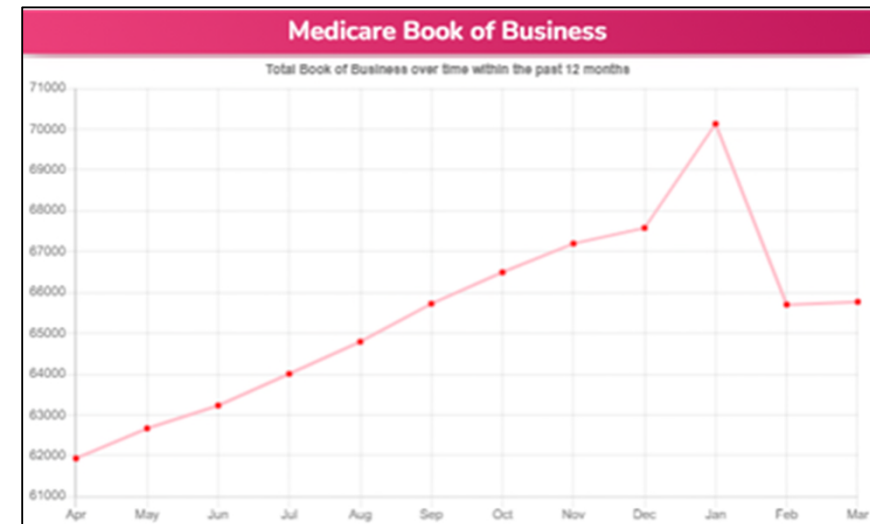
5. New Enrollments

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





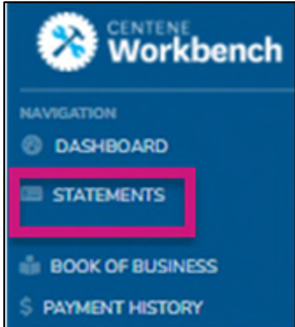
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Statements



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
- 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		





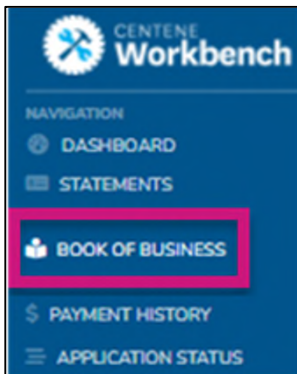
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Book of Business



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		





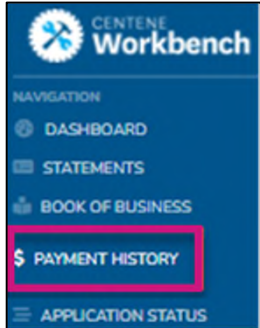
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Payment History

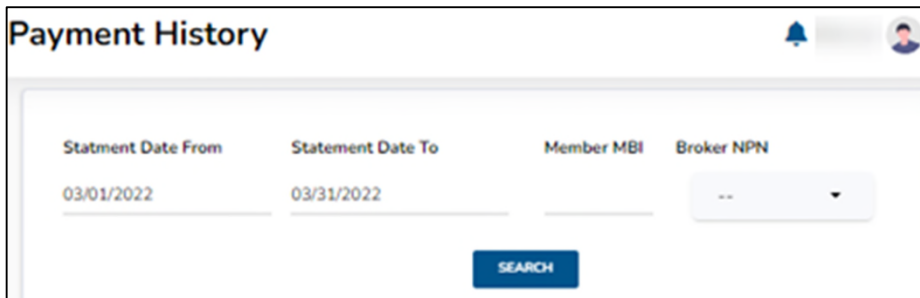


Payment History

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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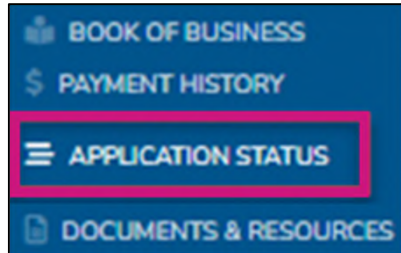
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Application Status



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" value="--"/>
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

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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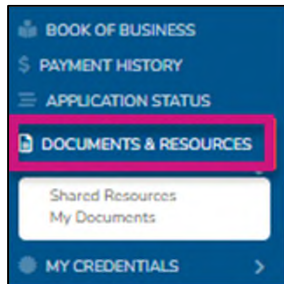
Documents & Resources



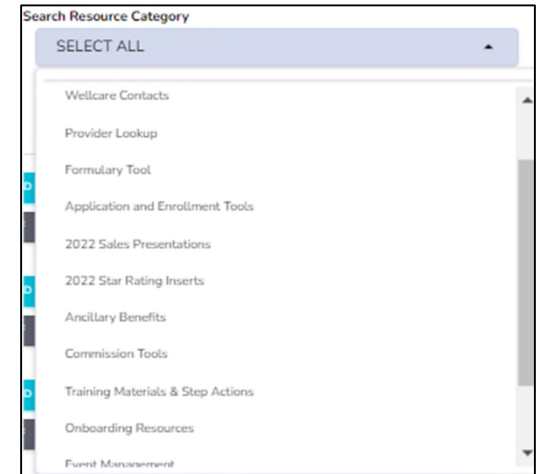
Document Resources

Shared Resources

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



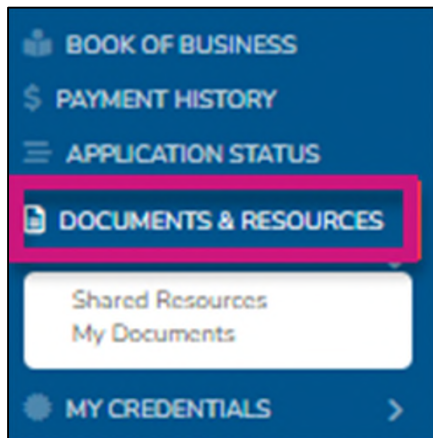
- Use the **Search Resource Category** option to look for specific document topics
- Use the open text Search field as an alternative
- If the resource is a PDF, view the document within the portal, or download it.



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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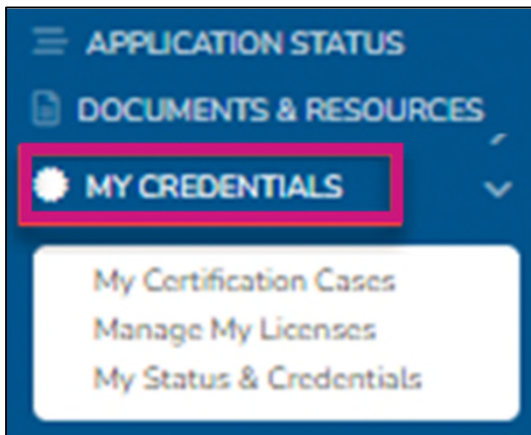
My Credentials



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

<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

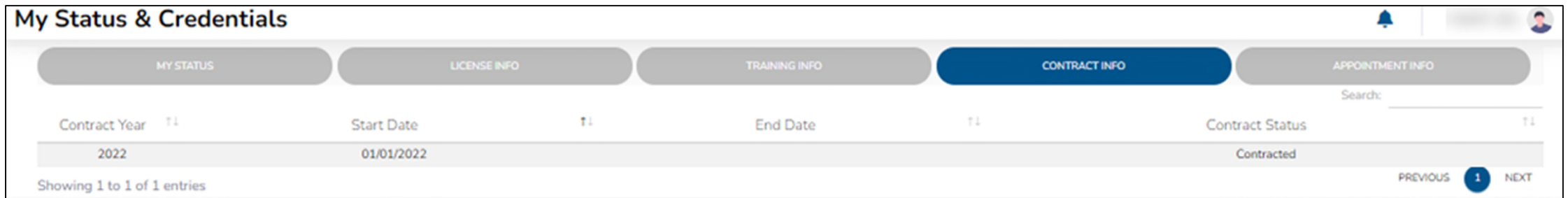
- Every year track progress through the Training Progress column.
- Training Progress Percent Breakdown:
 - 25% = AHIP Only Completed
 - 50% = AHIP + ACT Journey Completed
 - 75% = AHIP + ACT Journey & Product Completed
 - 100% = AHIP + ACT Journey & Product + ACT Exam (Passed)



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 the search bar is a table with the following columns: 'Contract Year', 'Start Date', 'End Date', and 'Contract Status'. The table contains one row with the following data: '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

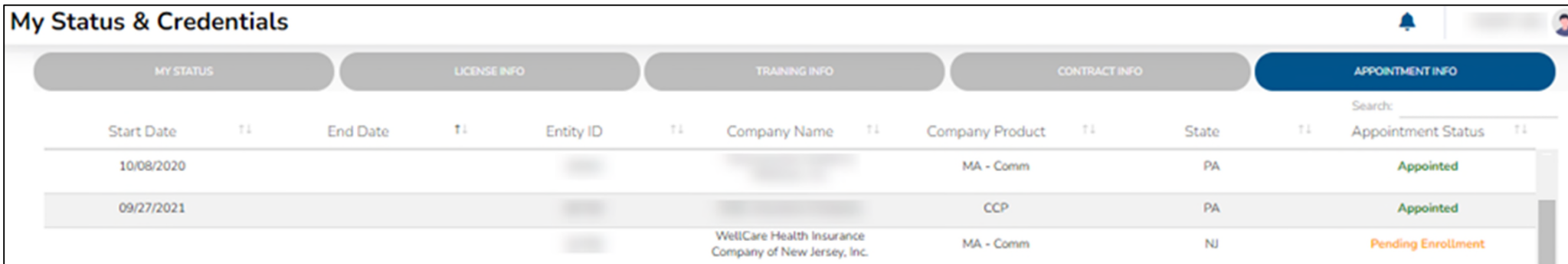
- The End Date will remain blank as long as the contract remains valid
- When there is a required contract addendum to acknowledge, a new line with the updated contract year and start date will display
 - The previous contract will be updated with an End Date



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.

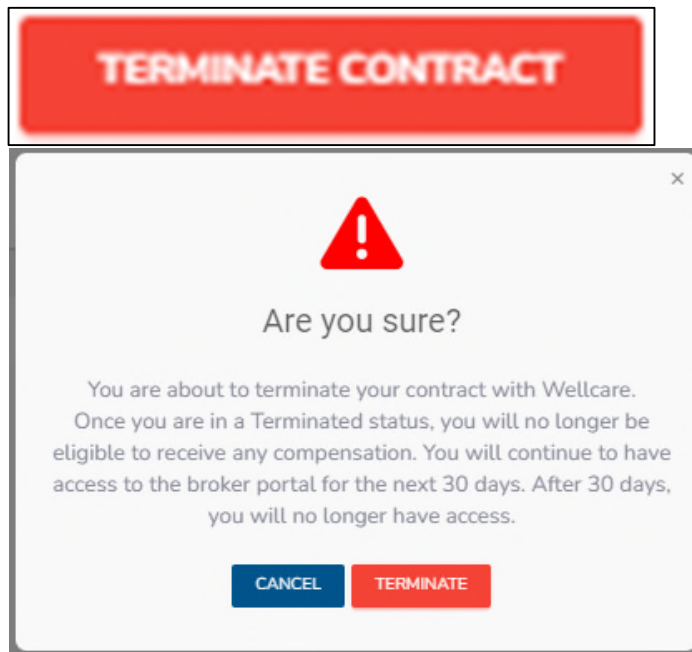
Note: Wellcare manages the appointments with each state. There is no action on your part. This tab is just for monitoring and tracking your credentials.



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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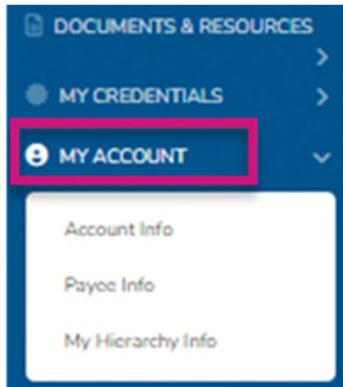
My Account



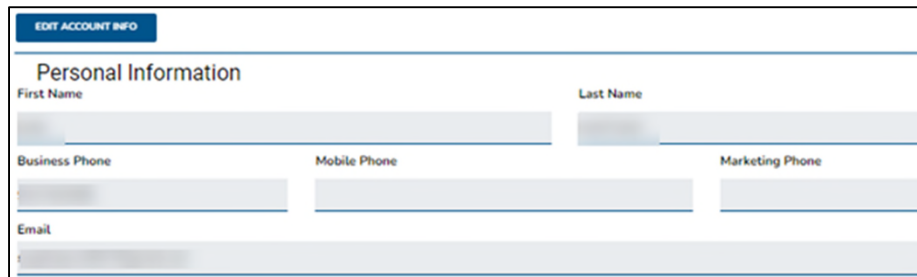
My Account

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'. The second section contains three input fields: 'Business Phone', 'Mobile Phone', and 'Marketing Phone'. The third section contains one input field: 'Email'.

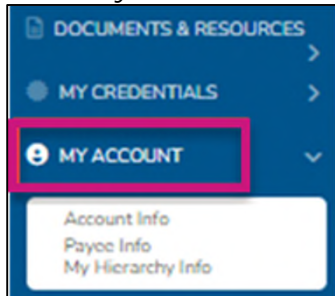
Note: Name and Business Address is pulled directly from NIPR and cannot be changed as it must match your license.



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.

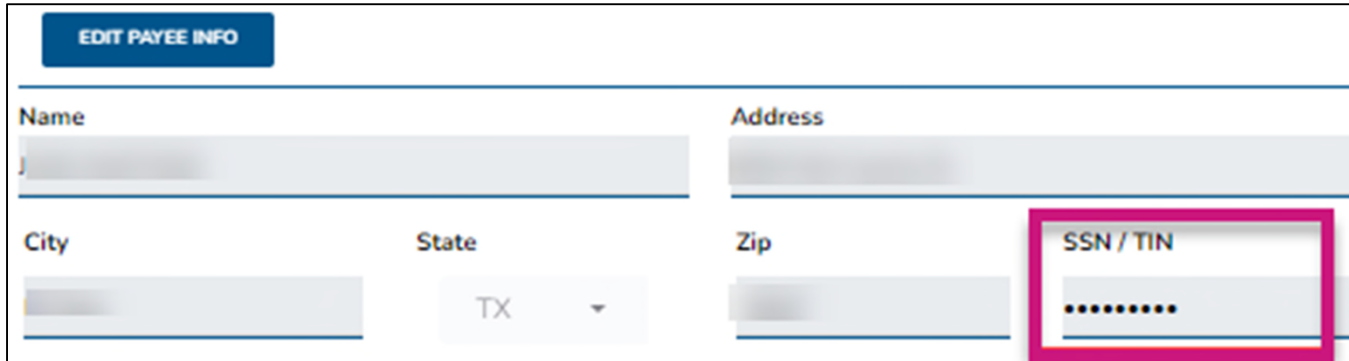
A screenshot of a form titled 'EDIT PAYEE INFO'. The form has two main sections. The first section has two input fields: 'Name' and 'Address'. The second section has four input fields: 'City', 'State' (with a dropdown menu showing 'TX'), 'Zip', and 'SSN / TIN' (with a masked input field showing seven dots).

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 has several input fields: "Name", "Address", "City", "State" (with a dropdown menu showing "TX"), "Zip", and "SSN / TIN". The "SSN / TIN" field is highlighted with a red box. The "Name" field contains the letter "J".

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

The image shows a digital form titled "W-9 Request for Taxpayer Identification Number and Certification". The form includes sections for "Part I - Employer Identification Number (EIN)", "Part II - Certification", and "Part III - Signature". The form is partially filled out with redacted information. The form is displayed in a browser window with a toolbar at the top.

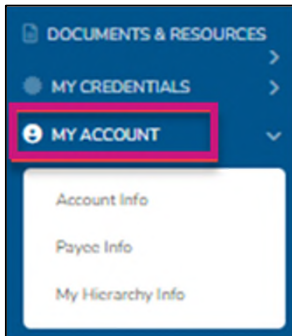
The image shows a digital signature and verification form. At the top, there is a checkbox labeled "I understand that my submission of this form means that I have read and understand the contents of this application, and that I confirm that the information I have provided is accurate." Below this, there are fields for "Date" and "IP Address", both of which are redacted. A large text box contains the instruction "Please sign your name in the space below." Below the text box is a "CLEAR" button. At the bottom right, there is a "SUBMIT" button.



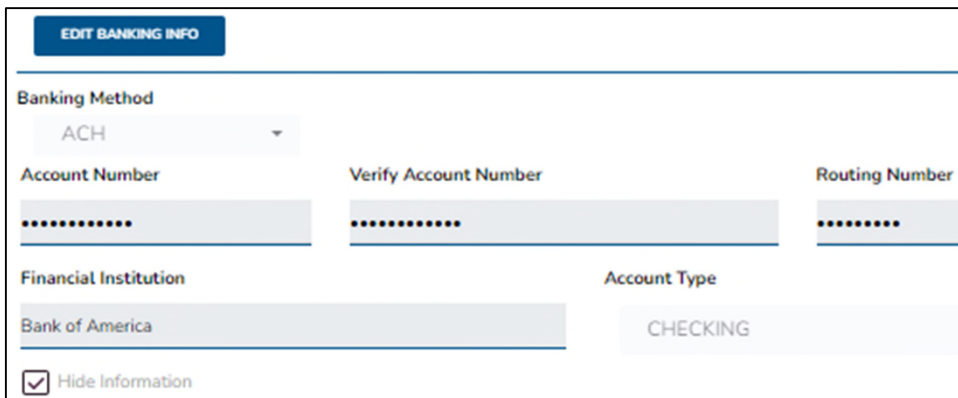
My Account

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.



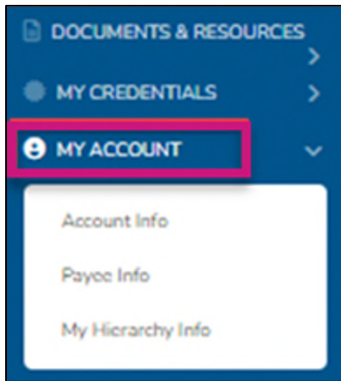
- Select the **Edit Banking Info** button and the fields will become editable to make changes.
- Uncheck the **Hide Information** box and the Account/Routing Numbers will become visible.

A screenshot of 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.

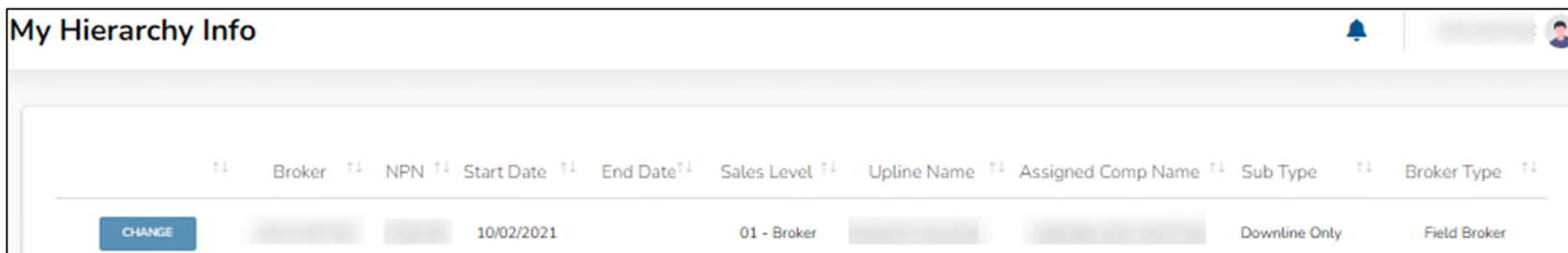
My Account

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.



	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

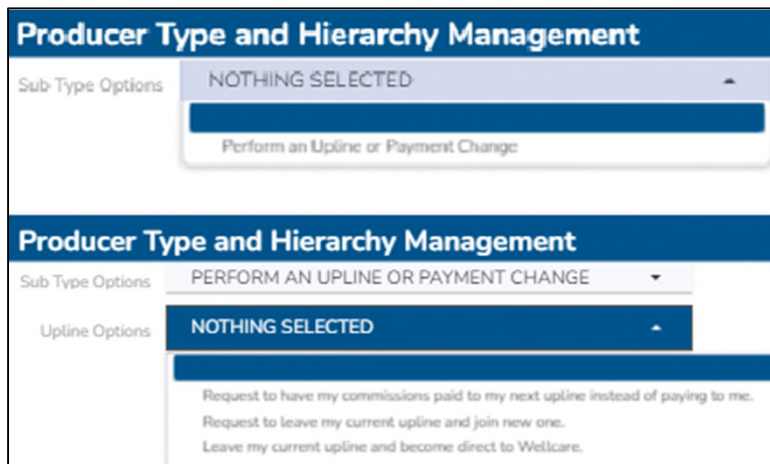


My Account

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



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

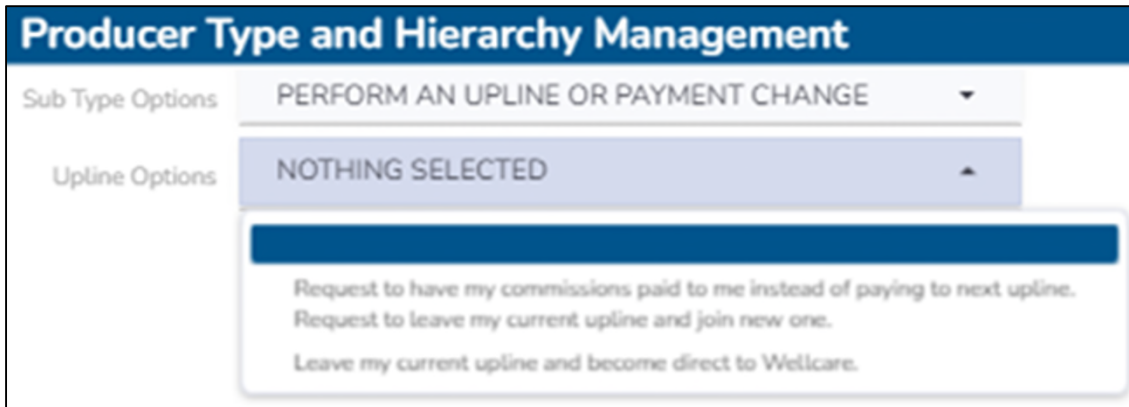
Request to have my commissions paid to my next upline instead of paying to me.
Request to leave my current upline and join new one.
Leave my current upline and become direct to Wellcare.



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

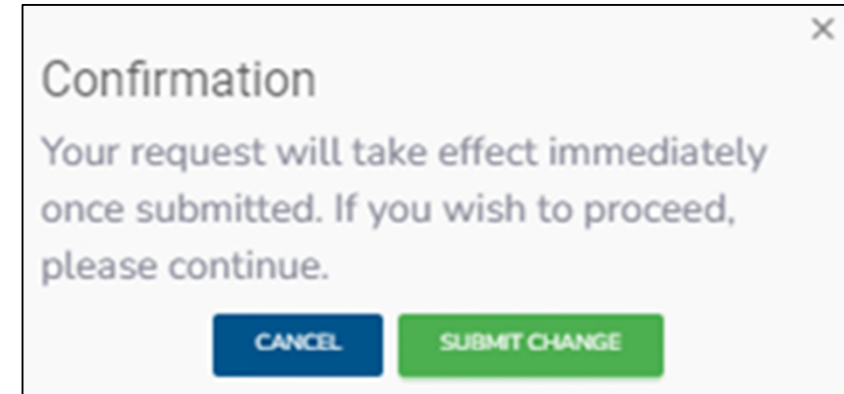


Producer Type and Hierarchy Management

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 the 'Producer Type and Hierarchy Management' form. The top screenshot shows the form with a dropdown menu open for the 'Will your new upline be receiving your commissions or will they be paid to you?' field. The dropdown options are: 'I will get paid my commissions.', 'Pay my commissions to my upline.', and a blue bar. The bottom screenshot shows the same form with the dropdown menu closed and the 'UPDATE' button highlighted with a red box.

Producer Type and Hierarchy Management	
Sub Type Options	PERFORM AN UPLINE OR PAYMENT CHANGE ▾
Upline Options	REQUEST TO LEAVE MY CURRENT UPLINE AND JOII ▾
Will your new upline be receiving your commissions or will they be paid to you?	-- ▾
	I will get paid my commissions.
	Pay my commissions to my upline.

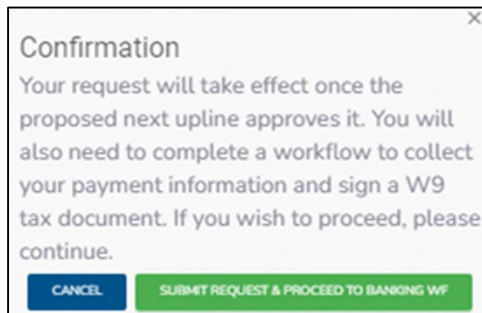
Producer Type and Hierarchy Management	
Sub Type Options	PERFORM AN UPLINE OR PAYMENT CHANGE ▾
Upline Options	REQUEST TO LEAVE MY CURRENT UPLINE AND JOII ▾
Will your new upline be receiving your commissions or will they be paid to you?	I WILL GET PAID MY COMMISSIONS. ▾
Next Upline	
	UPDATE



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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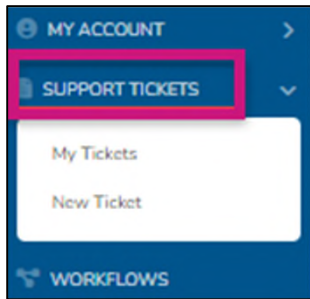
Support Tickets



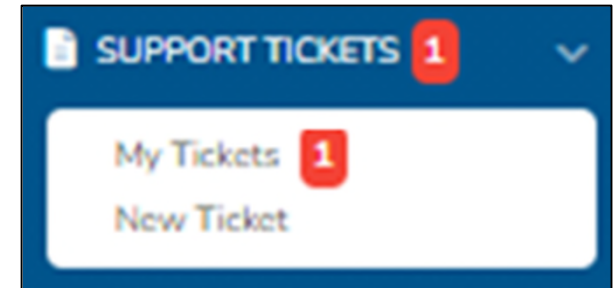
Support Tickets

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.

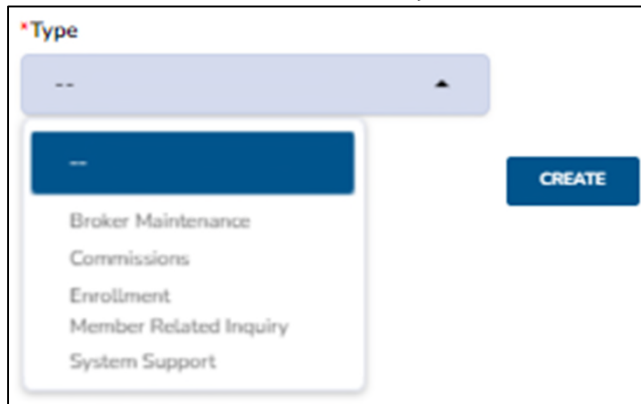
Status	Status Meaning
Resolved	Your inquiry has been worked and is resolved. The ticket is closed.
Pending Resolver	Your inquiry has been submitted and is in the queue to be assigned to a Sales Support rep.
Pending Broker Response	Sales Support requires additional information from you to resolve your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

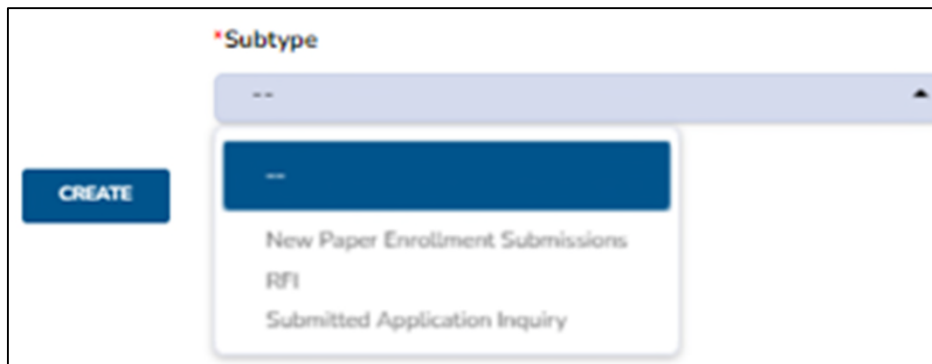
New Ticket

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 header containing "--" and a small upward-pointing triangle. Below the header, a list of options is displayed: "--", "Broker Maintenance", "Commissions", "Enrollment", "Member Related Inquiry", and "System Support". To the right of the dropdown 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



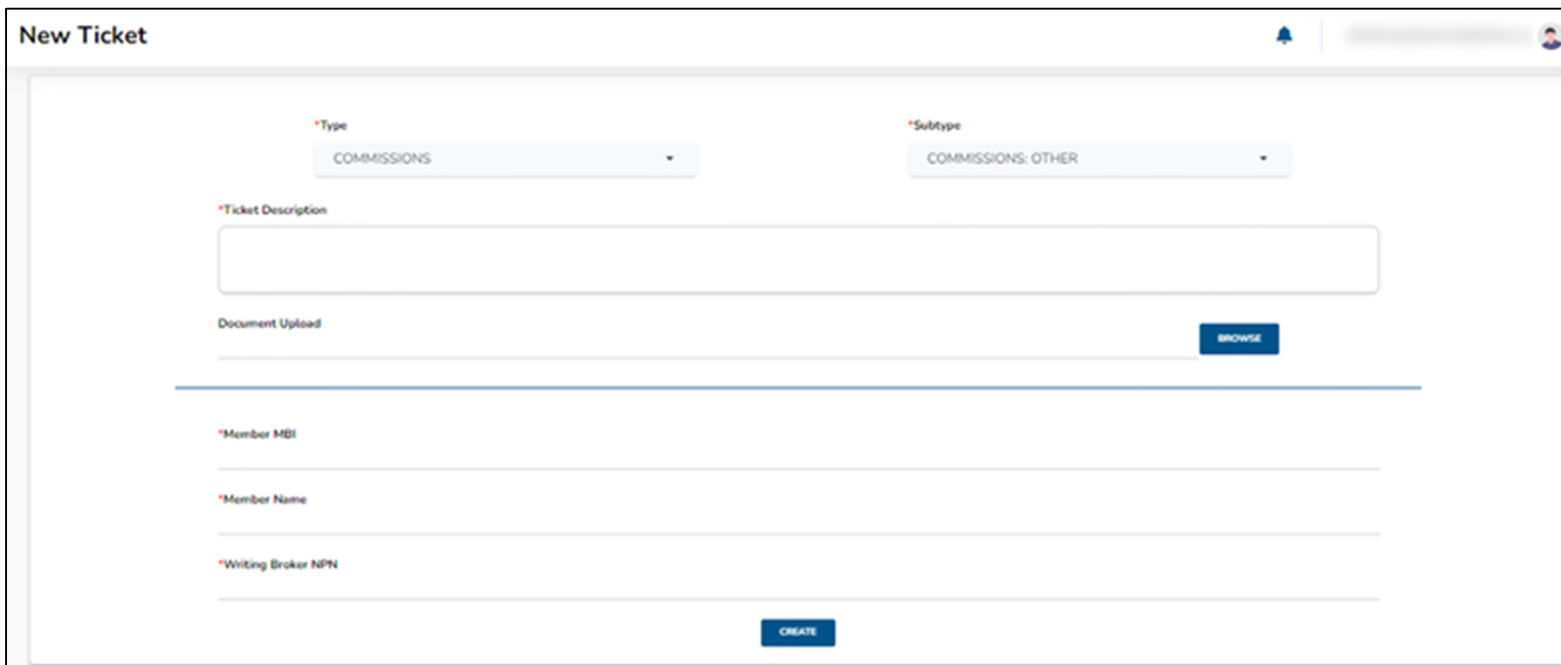
A screenshot of a web form titled '*Subtype'. It features a dropdown menu with a light blue header containing "--" and a small upward-pointing triangle. Below the header, a list of options is displayed: "--", "New Paper Enrollment Submissions", "RFI", and "Submitted Application Inquiry". To the left of the dropdown 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.





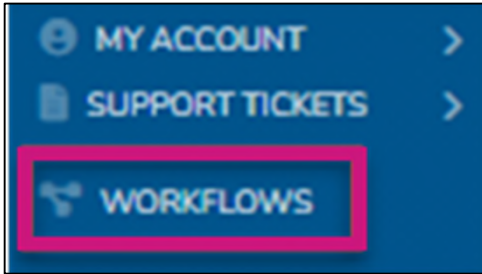
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Workflows

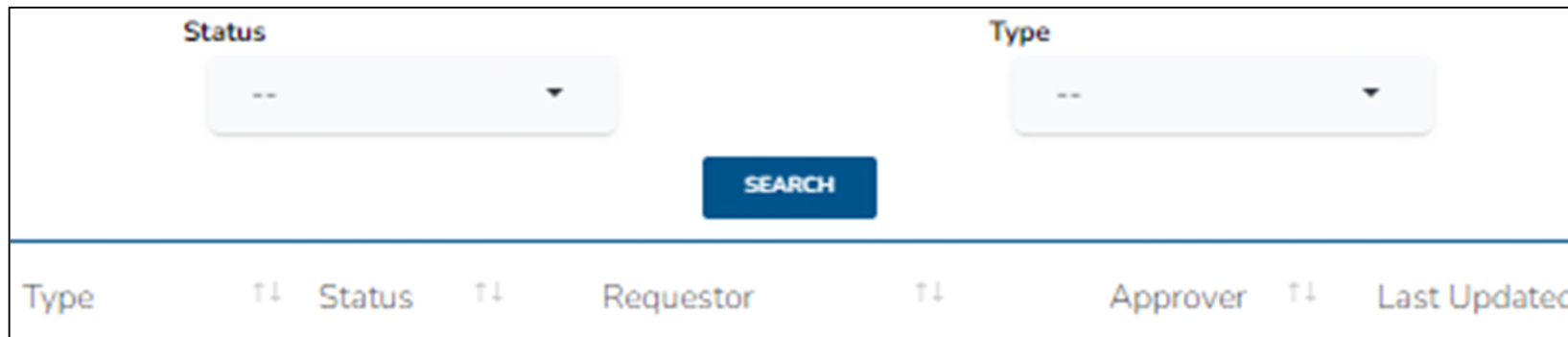


Workflows

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
- Approve or deny hierarchy change requests





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Questions?

