What to expect:
Annual
Certification &
Training

release 7-27-2011

Meeting Agenda 7/27/2011

1. Changes to Annual Certification for 2012
2. AHIP Certification Process
3. WellCare Certification Process
4. Online Enrollment (preview)
5. Contact Information and FAQs

2012 Annual Certification Process

Important Changes for 2012

Certification is a **three-step process**: 1) AHIP Certification, 2) WellCare Sales Certification, and 3) other WellCare courses, as required (detail follows)

AHIP Certification is required for all **Benefit Consultants, MOS, Sales Managers, Sales Directors, 1099 Agents** and certain support and vendor roles

AHIP training can be accessed via WellCare University, **emails to be sent beginning August 1***

Agents who access AHIP training via WellCare will pay **$100 – a discount of $50**

WellCare W2 associates who access AHIP training via WellCare pay no fees directly for AHIP Certification

Agents hired / contracted after August 1 will be certified to sell **both 2011 and 2012 products** once they have completed certification modules and exams: AHIP + WellCare + 2011 Products (as needed)

AHIP Exam pass/fail threshold = **85%**; WellCare Exam pass/fail threshold = **90%**

Agents have **three (3) attempts to pass** both AHIP and WellCare exams

FWA and HIPPA has been consolidated into an abridged course for 1099 agents

***NOTE**: Both 1099 and W2 Associates will be sent an email with a unique ID and link directing them to AHIP registration and certification, as well as the procedure to submit certifications to WellCare electronically. *Effective August 1, WellCare will not accept printed certificates as proof of completion.*

2012 Annual Certification Process

Overview

The WellCare Annual Certification Training Program consists of two certifications, one administered by America's Health Insurance Plans (AHIP) and the other by WellCare.

1. AHIP Certification

(successful completion of modules and exam, below):

- Part I: Overview: Medicare Program Basics: 65 minutes
- Part II: Medicare Health Plans [Medicare Advantage]: 60 minutes
- Part III: Medicare Part D Prescription Drug Coverage: 80 minutes
- **Part IV: Marketing Medicare Advantage and Part D Plans: 65 minutes
- **Part V: Enrollment Guidance for Medicare Advantage and Part D Plans: 90 minutes
- Mastery Exam

*** modules required for agents seeking re-certification*

2. WellCare Sales Certification

(AHIP Certification, plus successful completion of modules and exam, below)

- Annual Certification Training (ACT): Introduction and Overview: 10 minutes
- About WellCare: 10 minutes
- WellCare Medicare Advantage Products: 30 minutes, each state
- WellCare Medicare PDP Products (PDP-only agents): 30 minutes
- Selling Effectively and Compliantly: 60 minutes
- Mastery Exam

3. Other Requirements

- FWA, HIPAA, CIA, etc (Associates): 180 minutes
- HIPAA + FWA (1099 Agents): 30 minutes
- 2011 Products: 60 minutes, as required

- Agents can complete certifications in any order
- Links (sent via email) are unique to W2 and 1099 agents
- CE credits in accordance with AHIP policies – check with AHIP
- Completion times are estimates and will vary by learner

2012 Certification Support

Important Contacts

AHIP
Certification

Please Contact:
AHIP
24/7 Support Center

for help with:

AHIP ID
AHIP Login
Connectivity
AHIP Exam
AHIP Transcripts
AHIP Content

1099
WellCare Certification

Please Contact:
Producer Services
(producerservices@wellcare.com)
866-822-1339

or
LMS Support Center
(support@support.intelladon.com)

for help with:

Producer ID
Contracting

W2
WellCare Certification

Please Contact:
Supervisor / Manager
or
LMS Support Center
(support@support.intelladon.com)

for help with:
Enrollment Issues
LMS Courses
Exam results
Modules & Content

Next: Online Enrollment

2012 AHIP Certification Process

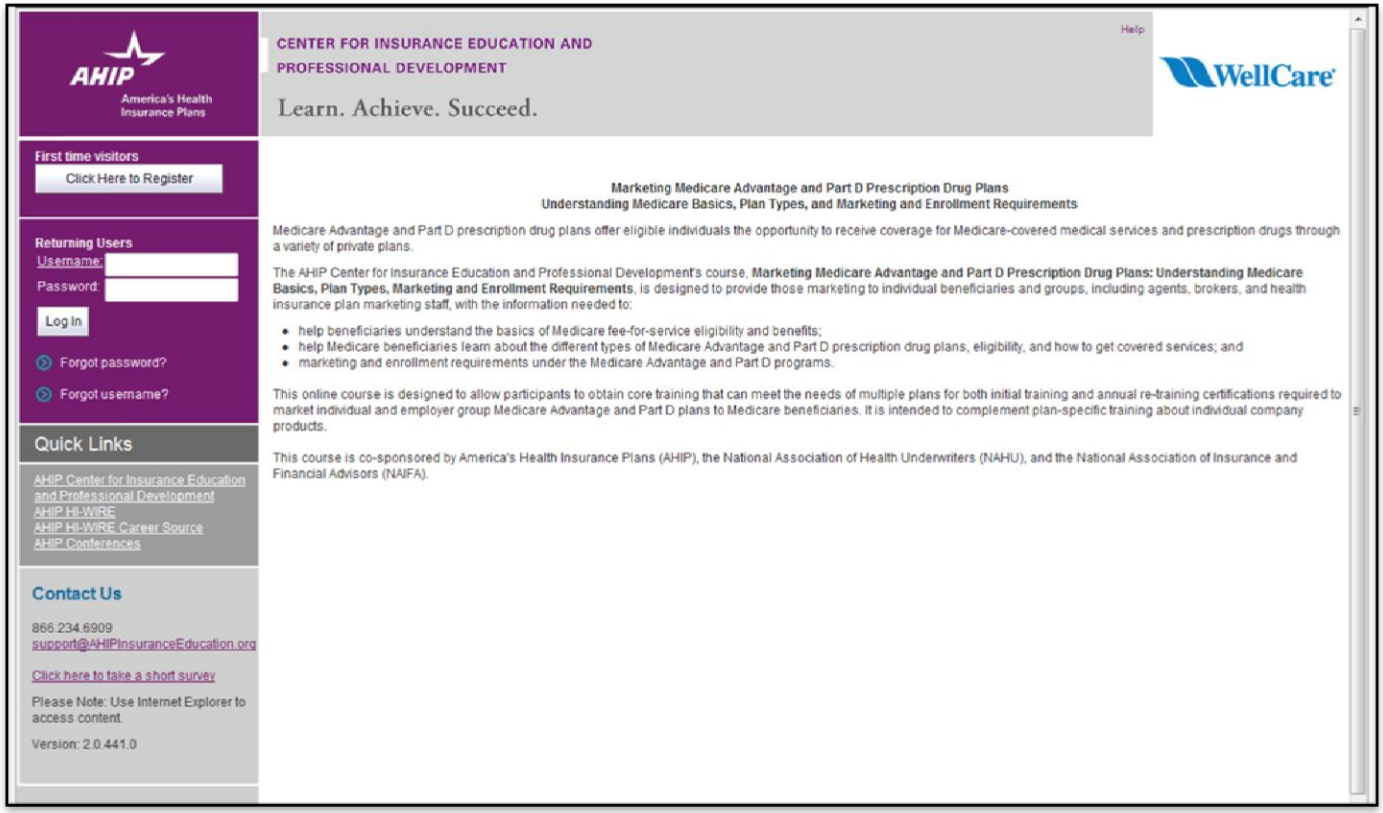
Log-In

AHIP and WellCare have teamed to create a custom co-branded site. You can submit a copy of your transcript to WellCare by following these steps.

First, login into AHIP's training center using the link provided to you by WellCare University.

AHIP 24/7 Support can assist with any questions regarding your account.

Internet Explorer is recommended for WellCare training



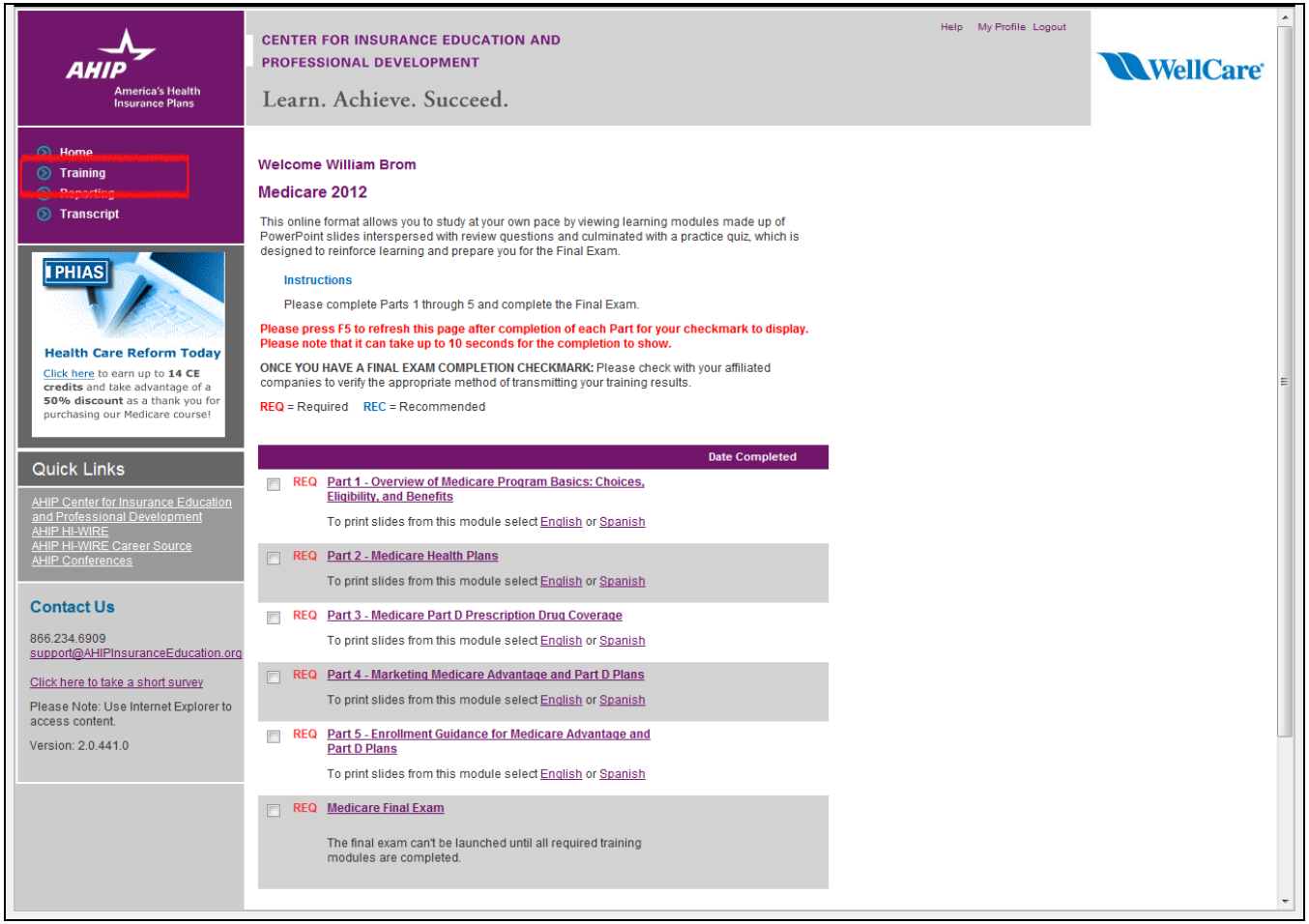
IMPORTANT! WellCare will automatically receive a transcript of anyone who initiates the AHIP Certification process through WellCare University. These instructions apply to those who previously completed AHIP 2012 Certification with another carrier or on their own.

2012 AHIP Certification Process

Access Training

Select “**Training**” from the menu of options on the left.

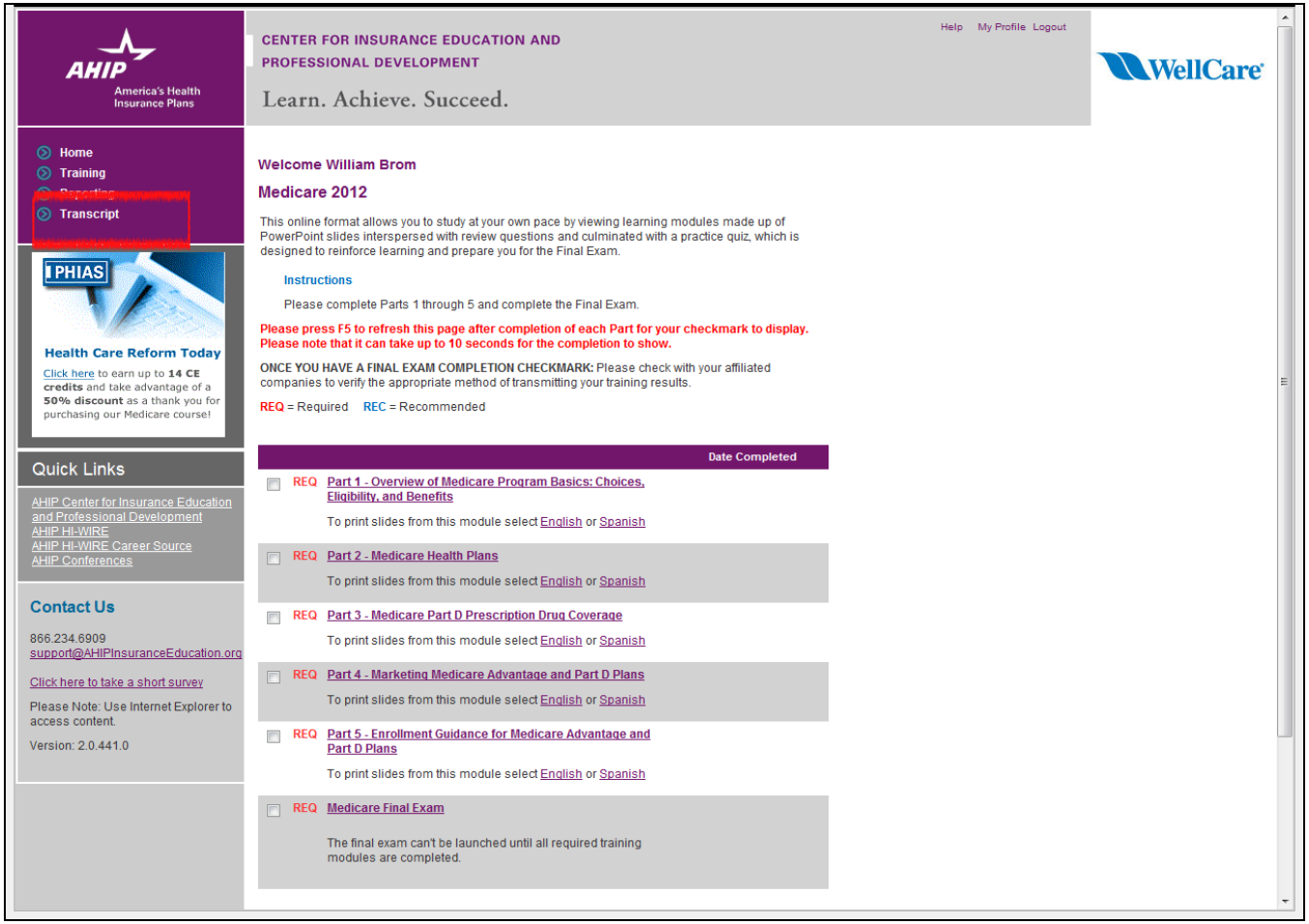
The modules to be completed are listed on the page. Complete each module required by AHIP.



2012 AHIP Certification Process

View Certificate

Select “**Transcript**” from the menu of options on the left.



2012 AHIP Certification Process

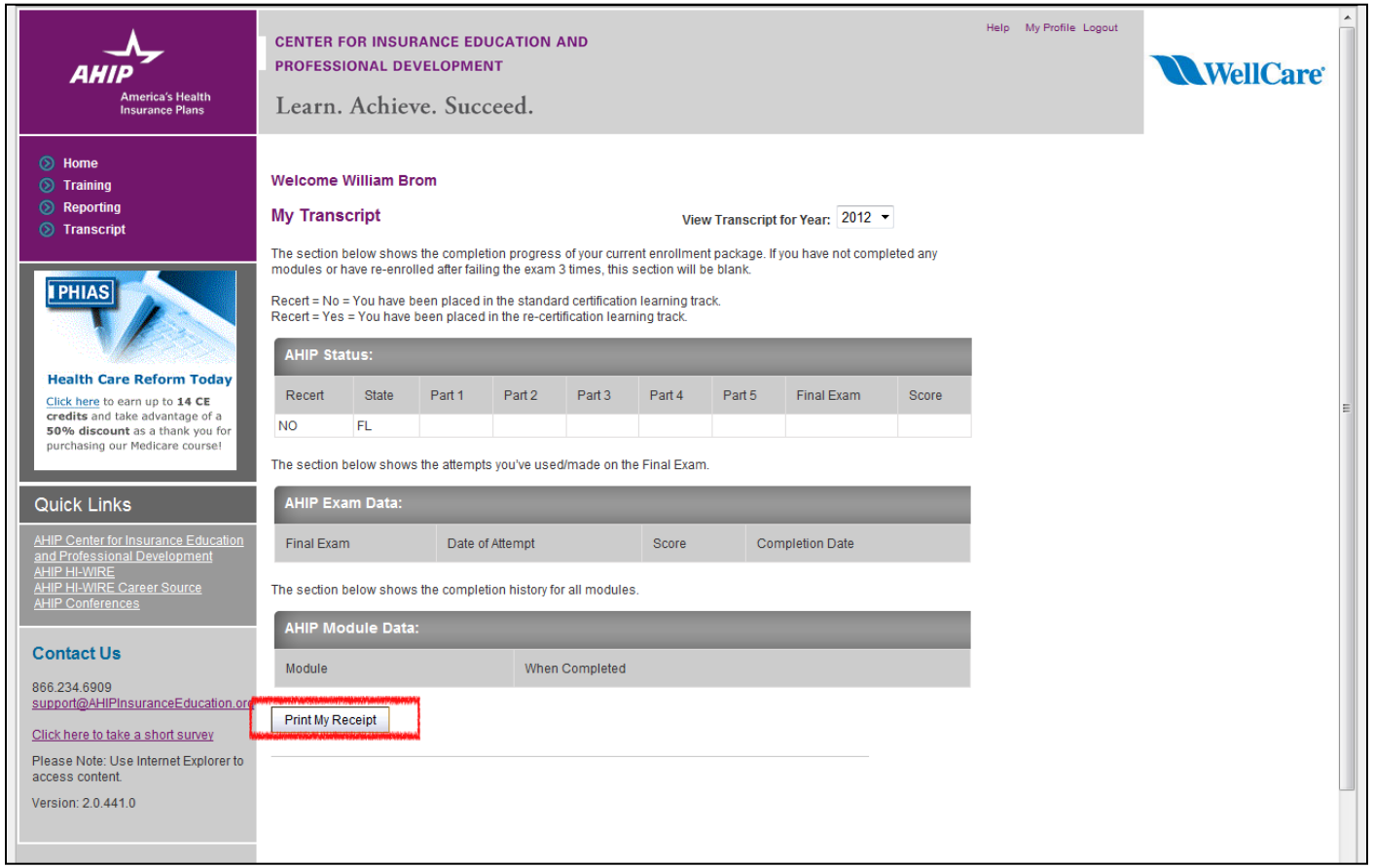
View Certificate

The Transcript screen allows you to view your AHIP status, Exam results, Module results and any CE purchase history.

From here, you can print a copy of your AHIP receipt by selecting "**Print my Receipt**"

You can print a copy of your AHIP Certification by selecting "**Print Certificate**"

You should keep these for your records*



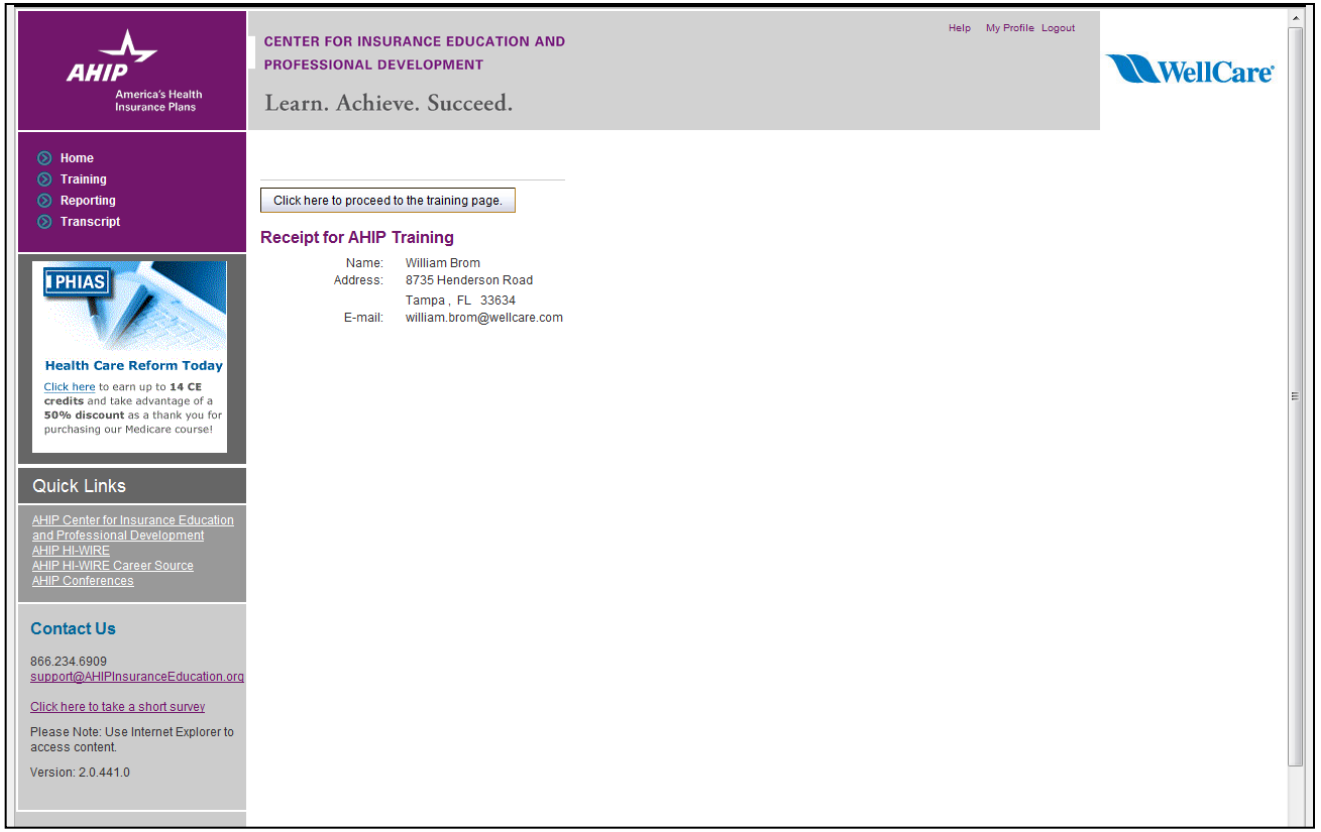
2012 AHIP Certification Process

Send Certificate

To send your results, click "**Send my final exam completion to WellCare**."

By clicking on this link, you have completed the steps required for us to receive your transcript (electronic certification).

Receipt confirmation screen shown, at right.



IMPORTANT! WellCare must receive your AHIP transcript in order for you to continue the 2012 WellCare Certification process. Effective August 1, WellCare will not accept printed documents as proof of completion.

2012 AHIP Certification Process

Questions about AHIP?

Next: WellCare Certification

2012 WellCare Certification Process

Step 1

Internet Explorer is recommended for all WellCare training

Log in to **www.wellcaretraining.com**

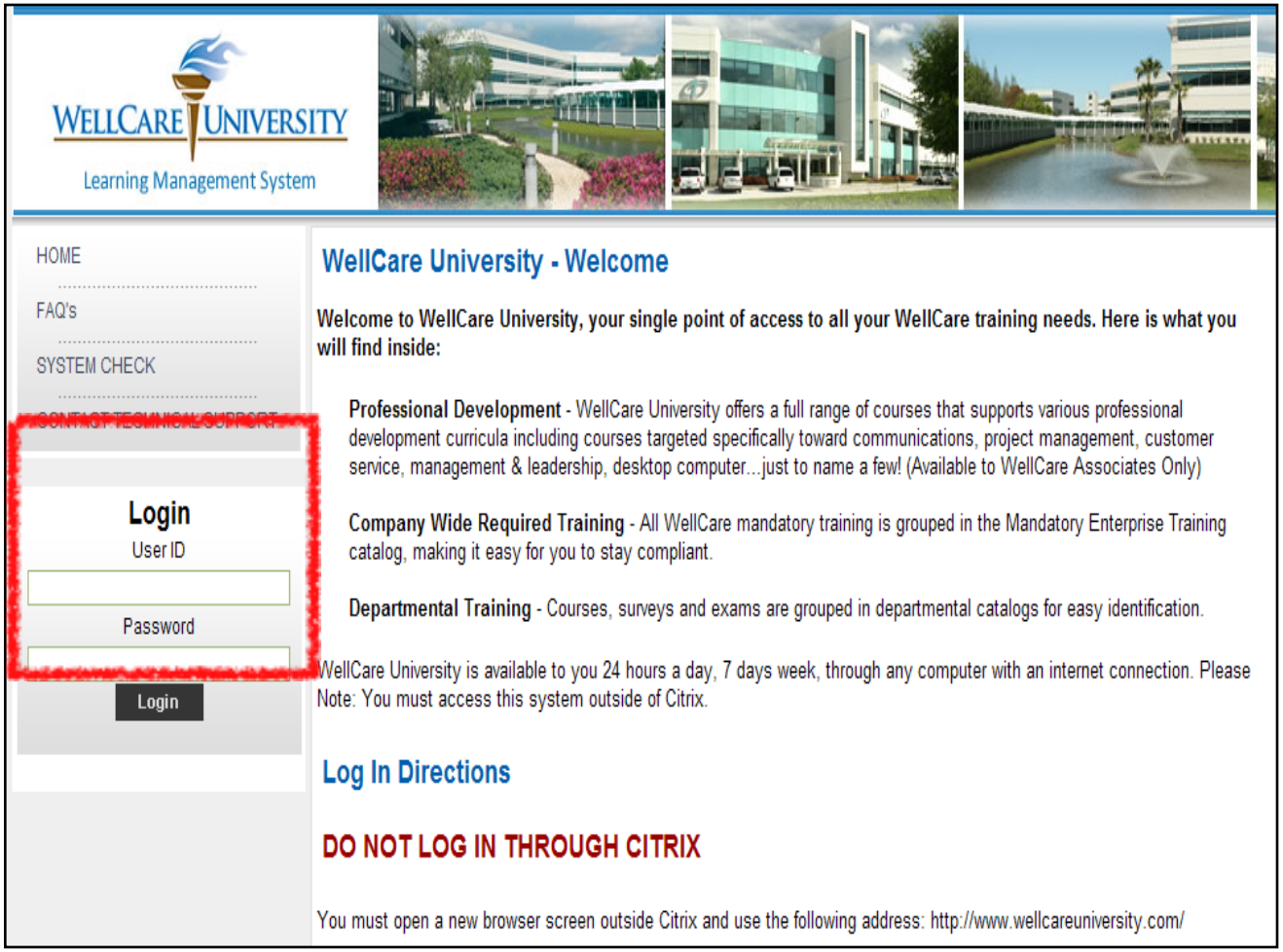
Enter your **User ID:**

WellCare Associate (W2) IDs are assigned upon hire;

1099 IDs: First Initial of First Name + Last Name + Last 4 of SSN: (ex.jdoe1234)

Enter **Password** (“wellcare” or as assigned)

Click “**Login”** button



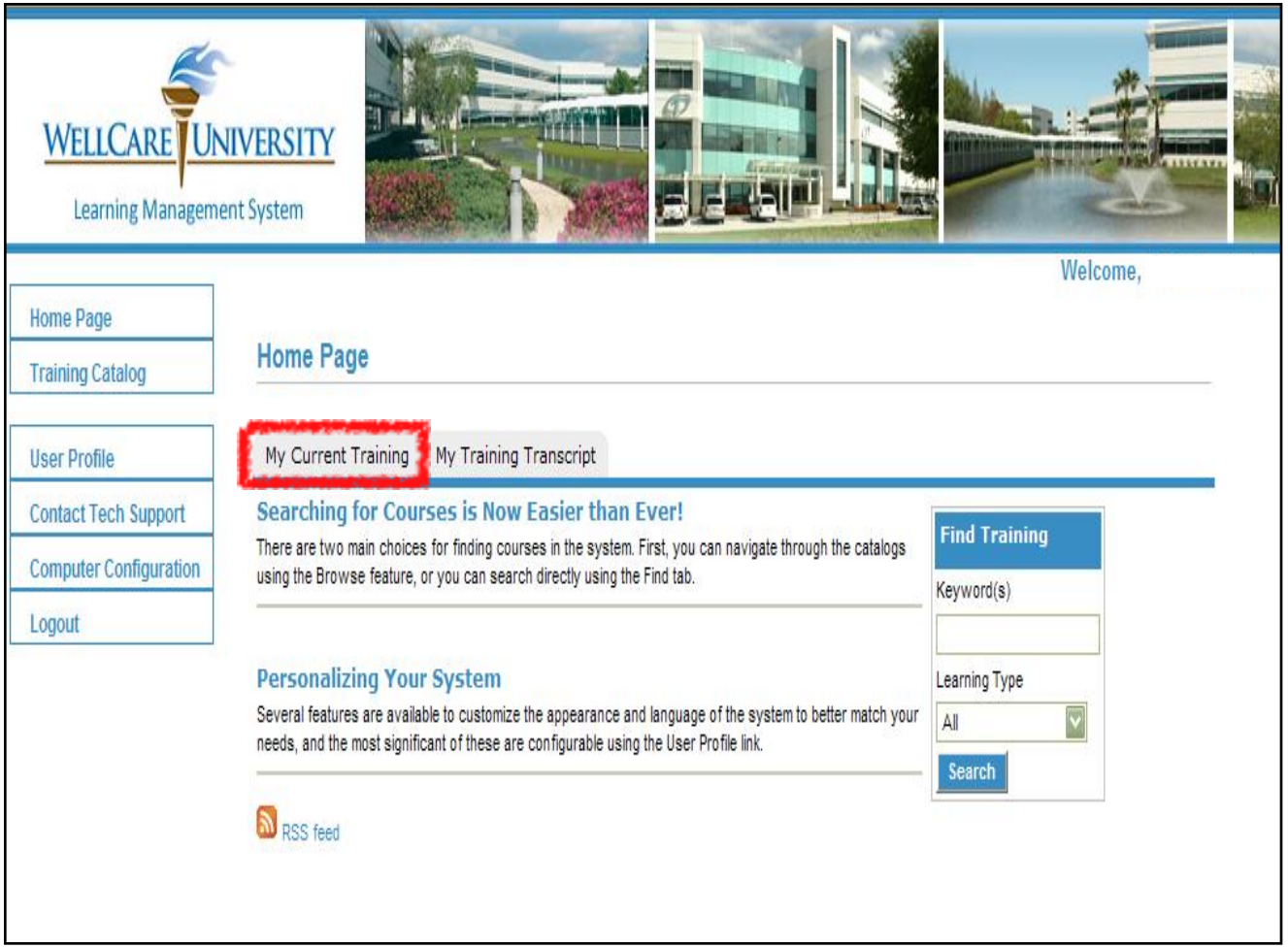
2012 WellCare Certification Process

Step 2

Once you login you will see a page listing any required courses.

Click on the 1st tab:

"**My Current Training**"

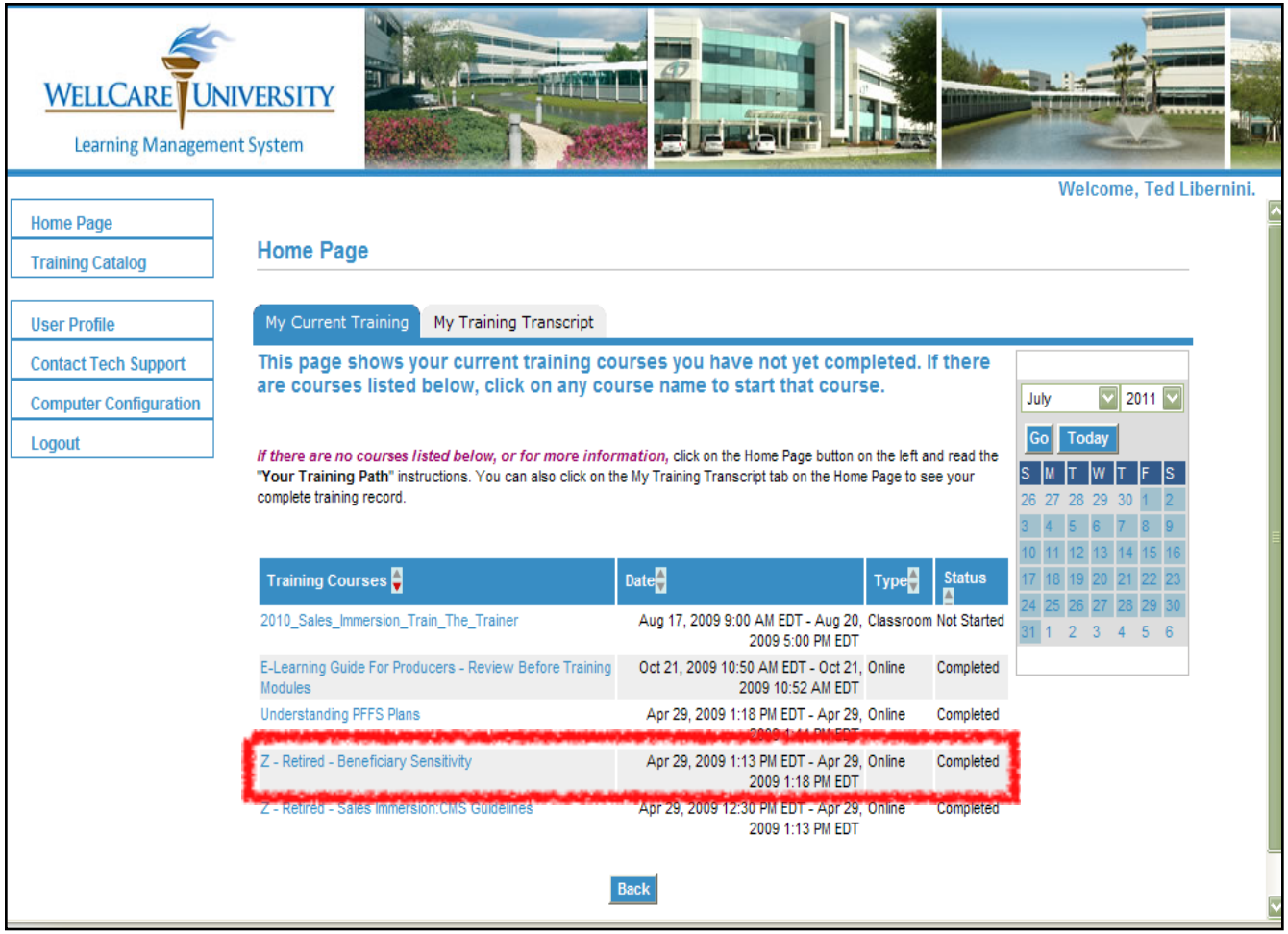


2012 WellCare Certification Process

Step 3

You will now see a listing of current training courses and modules required to complete certification, as well as any other required training.

To start a course, click on "**Course Name"** under the column "**Training Courses"**

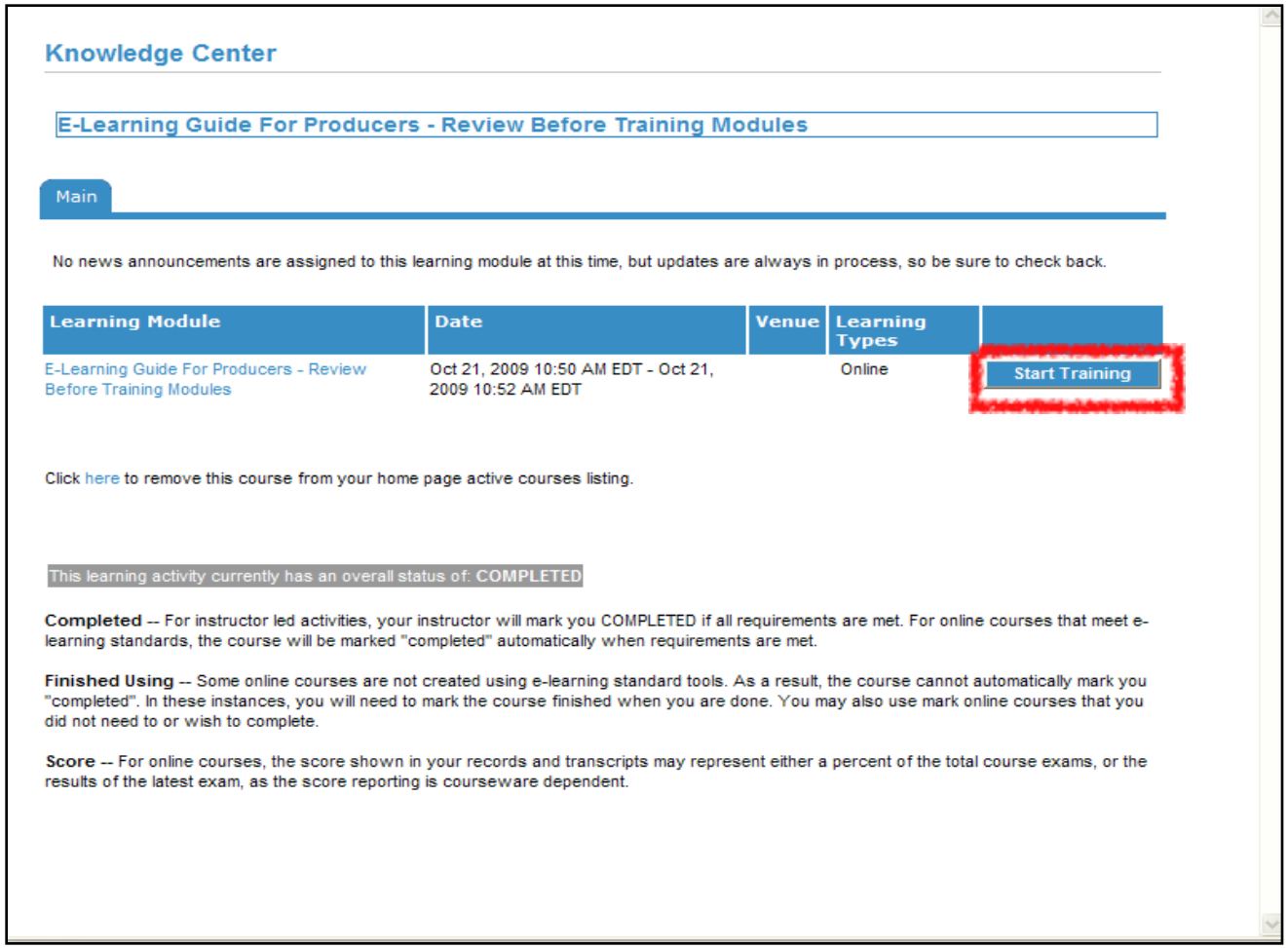


2012 WellCare Certification Process

Step 4

This will open a new screen as shown to the right.

Click on the small blue box labeled “**Start Training**” to begin each module



2012 WellCare Certification Process

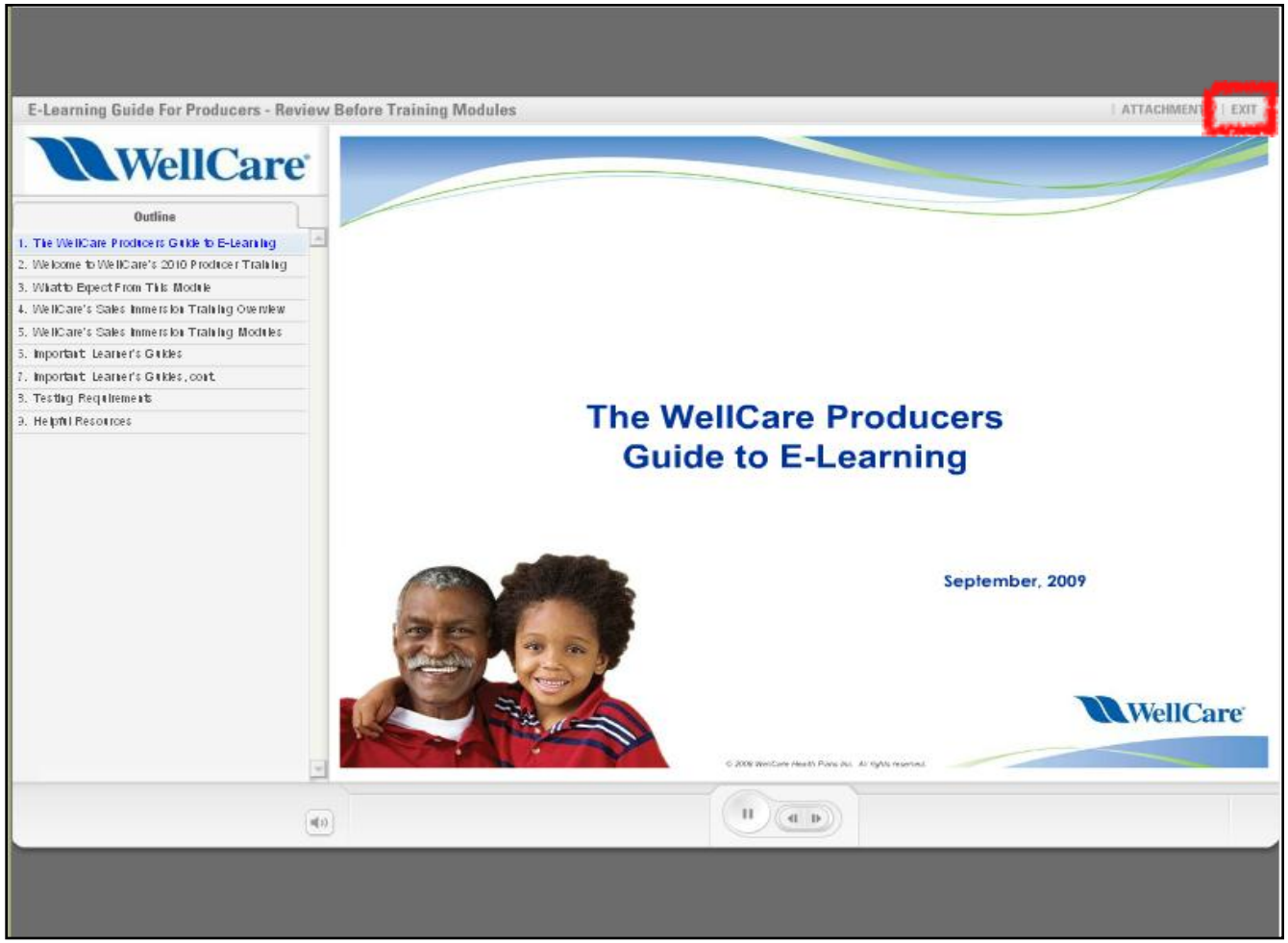
Step 5

You have now started the module.

On the left:
Module Outline (slides/content).

On the bottom:
Navigational options including play, pause, advance and reverse.

IMPORTANT!
You must complete every module by selecting the "**Exit**" button, which is located at the top right of every module

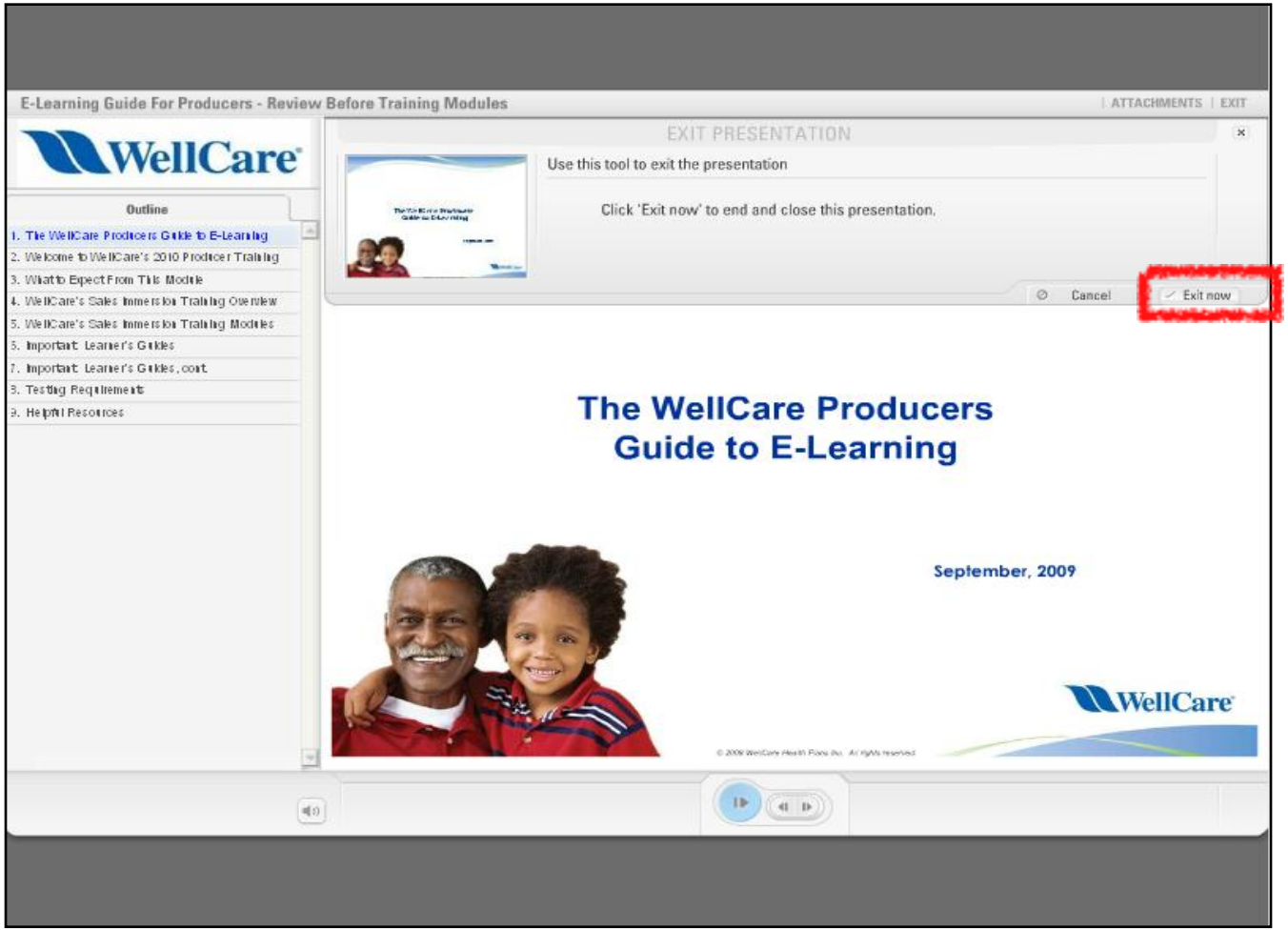


2012 WellCare Certification Process

Step 6

Once you click **Exit**, you will see a screen confirming your request to exit course, by selecting "**Exit Now**"

NOTE!
The Learning Management System will record your progress in each module. Partial completion of any module will only be recorded if you exit using the "**Exit**" option

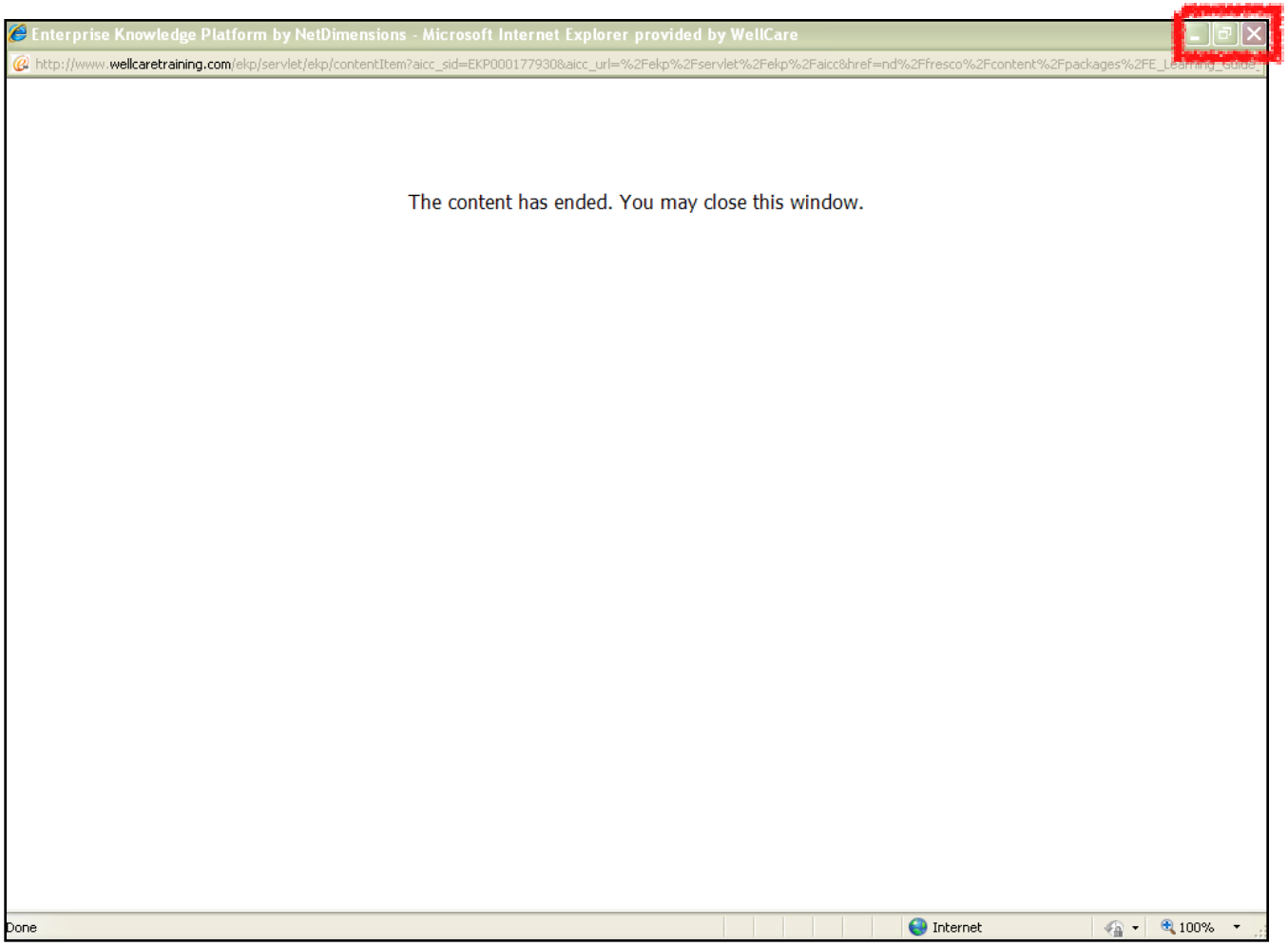


2012 WellCare Certification Process

Step 7

You have now completed the course / module.

Close the completion notification (window) by clicking on the red box “**X**” at the top right corner of this page.



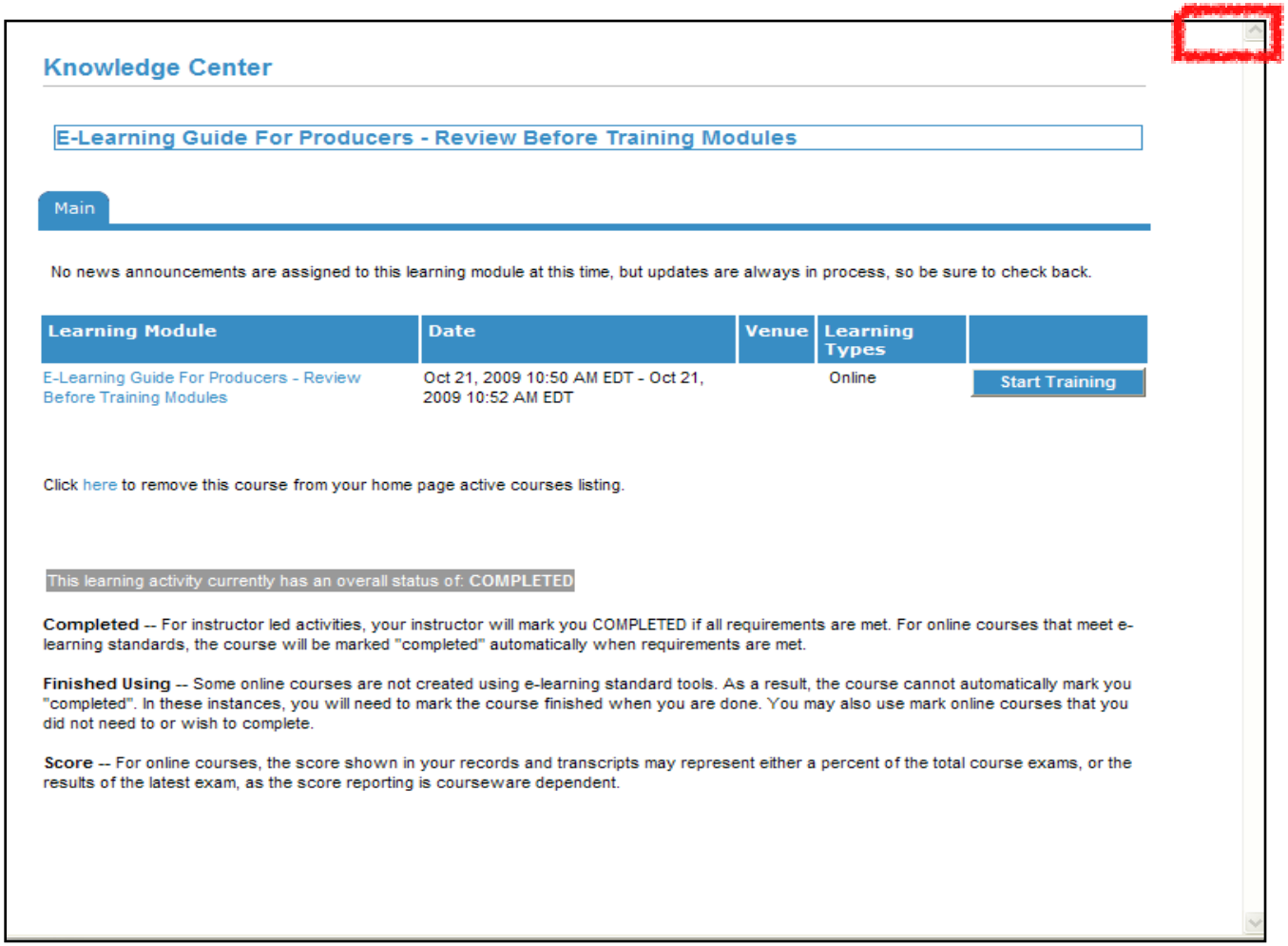
2012 WellCare Certification Process

Step 8

You can also close the "**Start Training**" window

Close this window by clicking on the Red box with the X

(Top Right Corner of Page)



2012 WellCare Certification Process

Step 9

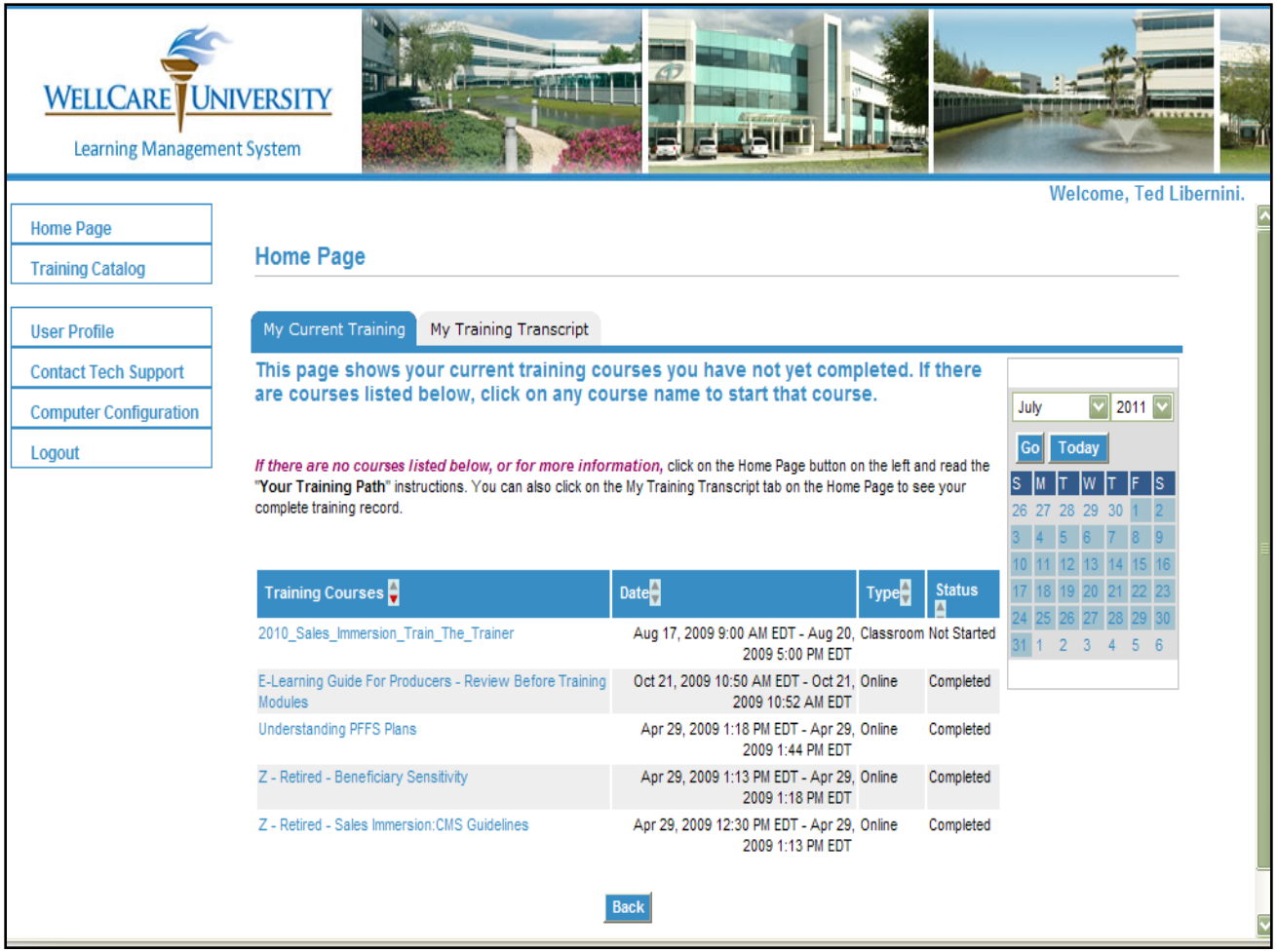
You are now ready to start your next course or module.

Follow steps 3 – 8 until you have completed all required courses and the annual certification mastery test

IMPORTANT!

2012 Products:
Agents need to complete Products training for the state in which they are licensed to sell. They do not have to complete training for every WellCare market.

2011 Products:
New agents must complete 2011 Products Module as part of the 2012 Certification, if they wish to sell 2011 products.



Questions about WellCare Certification?

Next: Online Enrollment

Using the Online Enrollment Portal

release 7-27-2011

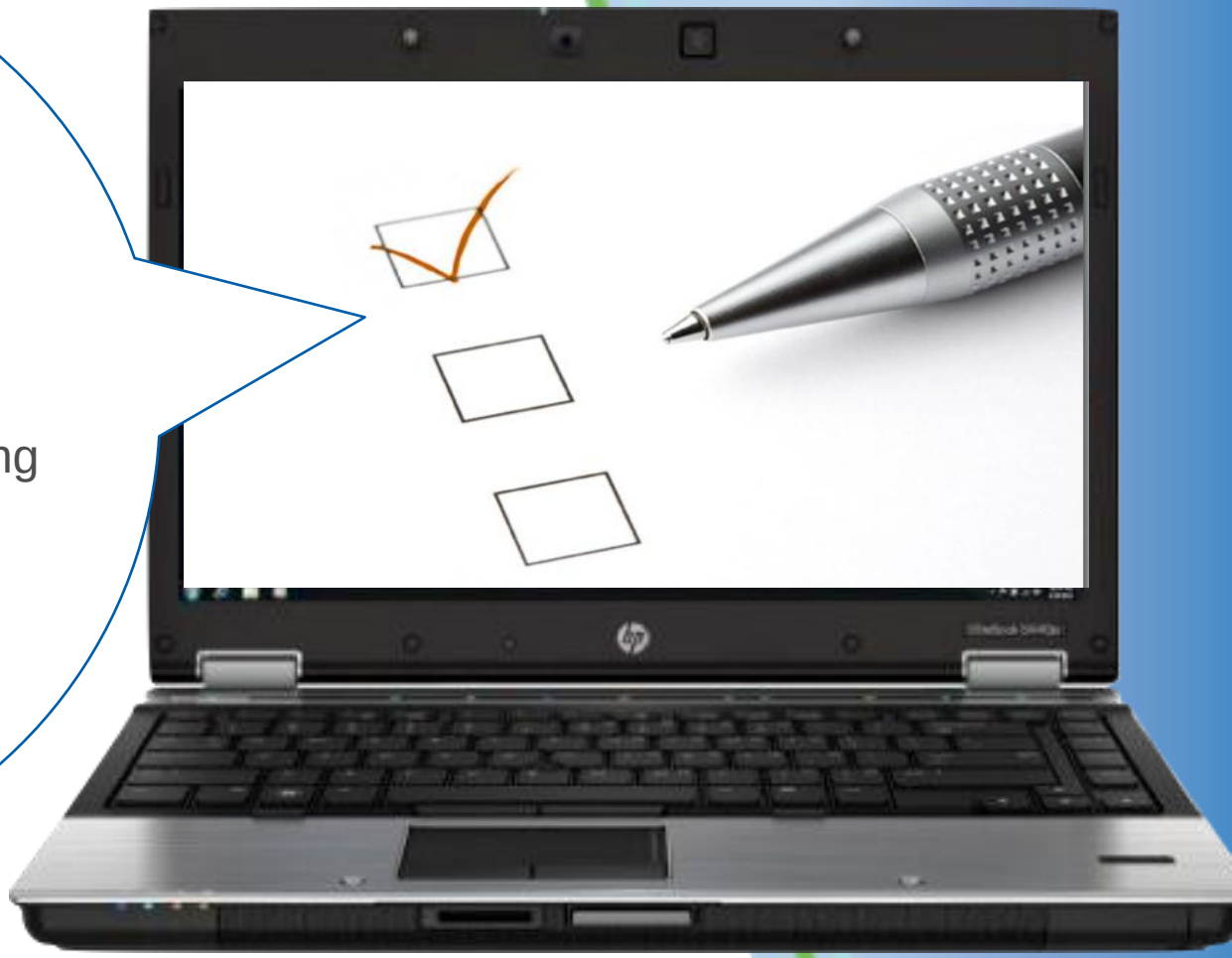
WellCome!

During this course
you will learn:

How and when to use the Online Enrollment Portal

The three steps to completing an online enrollment

The information needed to complete an EPAV
(Telephonic Authorization & Verification of an Online Enrollment)



Online Enrollment

Policy: when to use Online Enrollment or Paper Applications

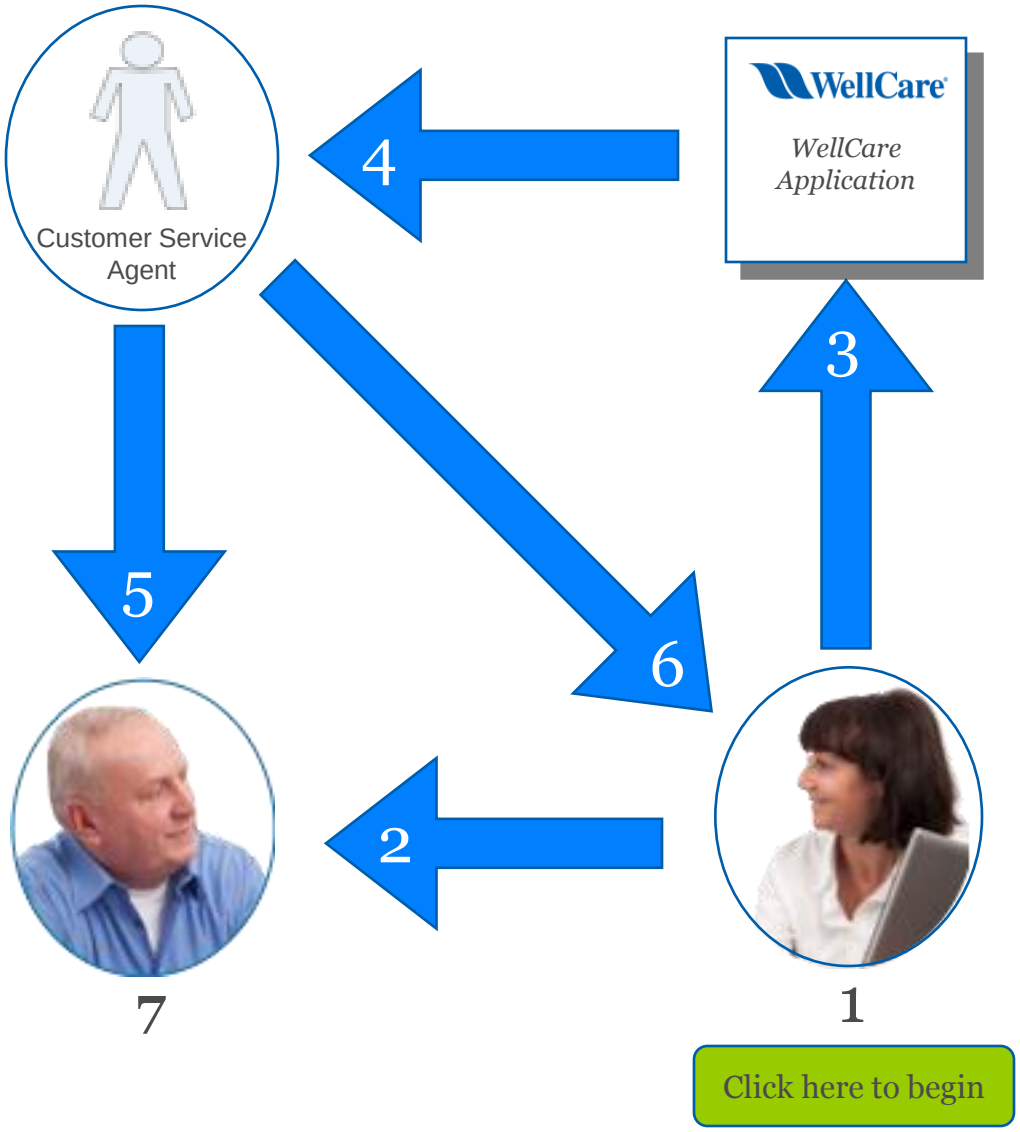
The Agent Assisted Enrollment Portal enrollment process was designed to replace the Paper Application process. There are times when the Paper Application process should be used. The exceptions include:

- Prospect is seeing impaired
- Language is not supported by the Enrollment Portal
- Phone / air card service is not available
- SalesForce.com systems or web are down
- IKA systems are down
- Business Consultant or 1099 agent does not have hardware and/or connectivity
- The appointment information lacks a street mailing address (i.e. alternate meeting location such as McDonalds)

(click the arrow to see how the process will work)

Online Enrollment

A Basic Overview



1. A producer logs into the Enrollment Portal to begin the application...

2. After confirming beneficiary information and plan selection...

3. The producer then completes an application through IKA

4. The application is reviewed by a customer service agent

5. The customer service agent confirms enrollment with the beneficiary

6. The customer service agent confirms the enrollment with the producer

7. The Medicare beneficiary is now a WellCare member!

Next, we will explore the process in detail...

How to log-in and enroll

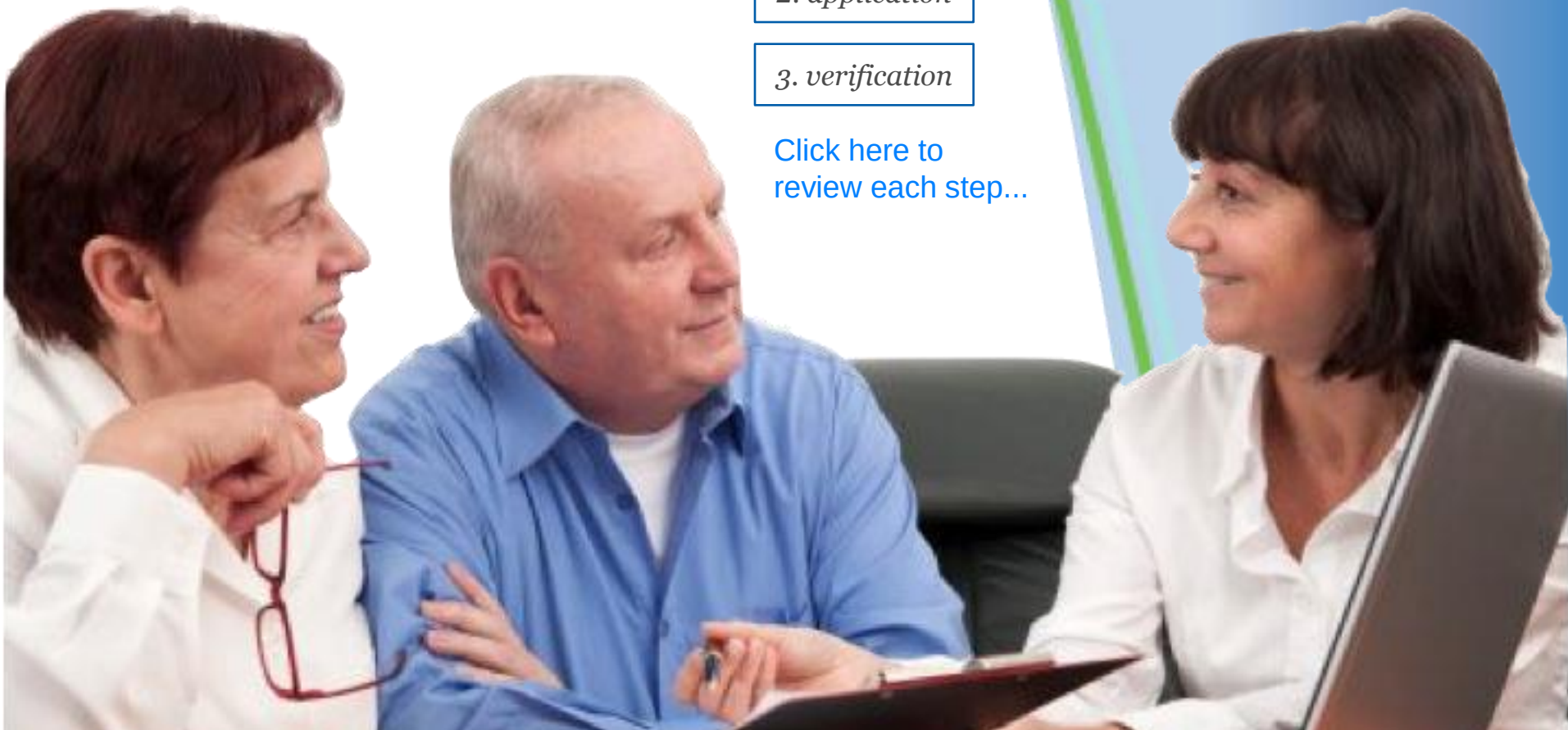
After you have successfully completed WellCare's one-on-one presentation and your client has made a plan selection, you can begin the three steps of the online enrollment process:

1. connection

2. application

3. verification

Click here to review each step...



Online Enrollment

Step-by-Step

Step 1

connection

Make sure your PC is connected to the Internet.

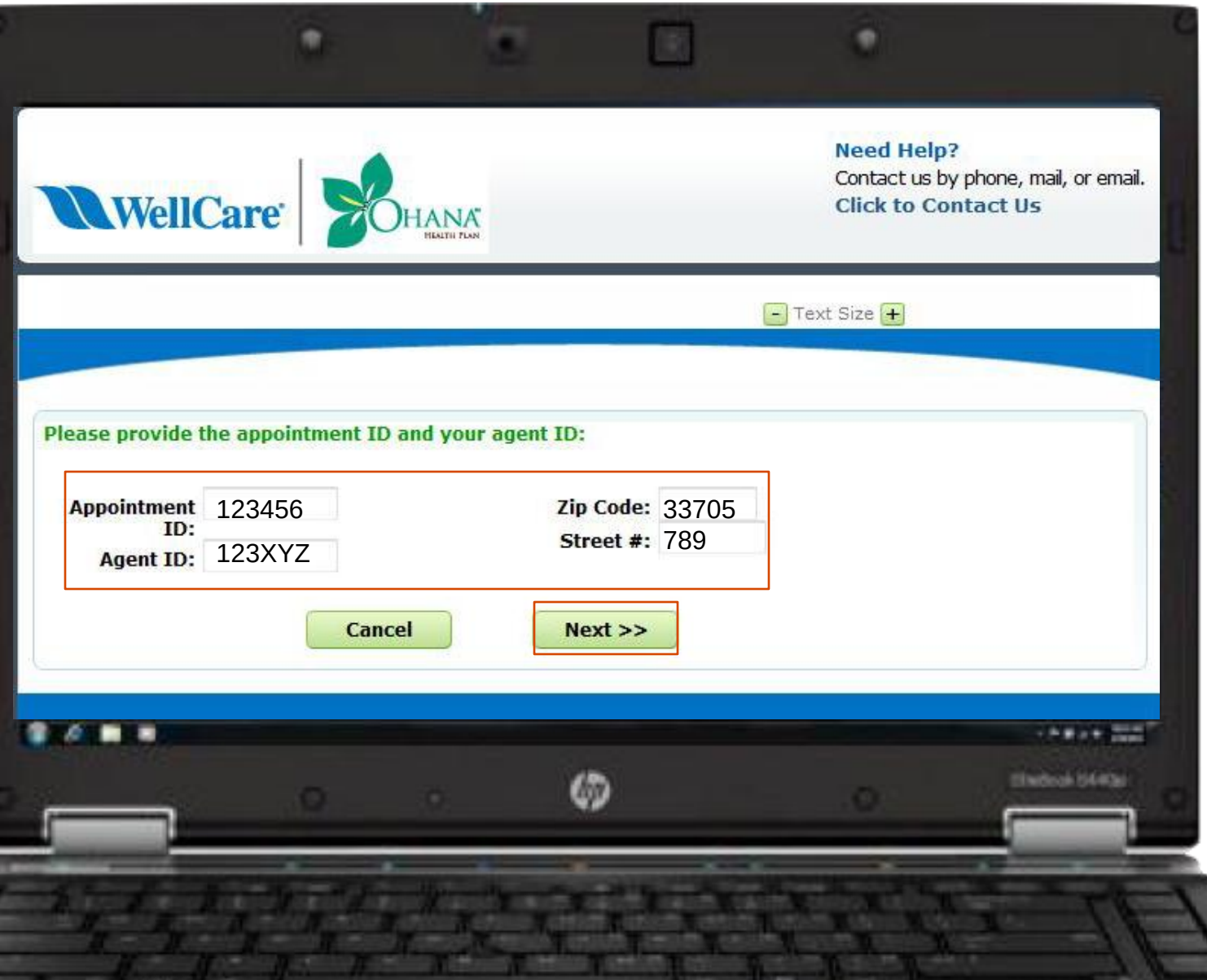
For WellCare BCs:
Double click on the Connection Manager icon (1) to open the dialog box.

The green power symbol (2) indicates the aircard is on. If the symbol is red, click on it to power on the aircard.

NOTE: you will need to use a paper application to complete the enrollment if you cannot connect to the Internet

Online Enrollment

Step-by-Step



Step 2

application

Using information found on your lead sheet....

Enter:

the appointment ID...

your agent ID...

ZIP code of appointment

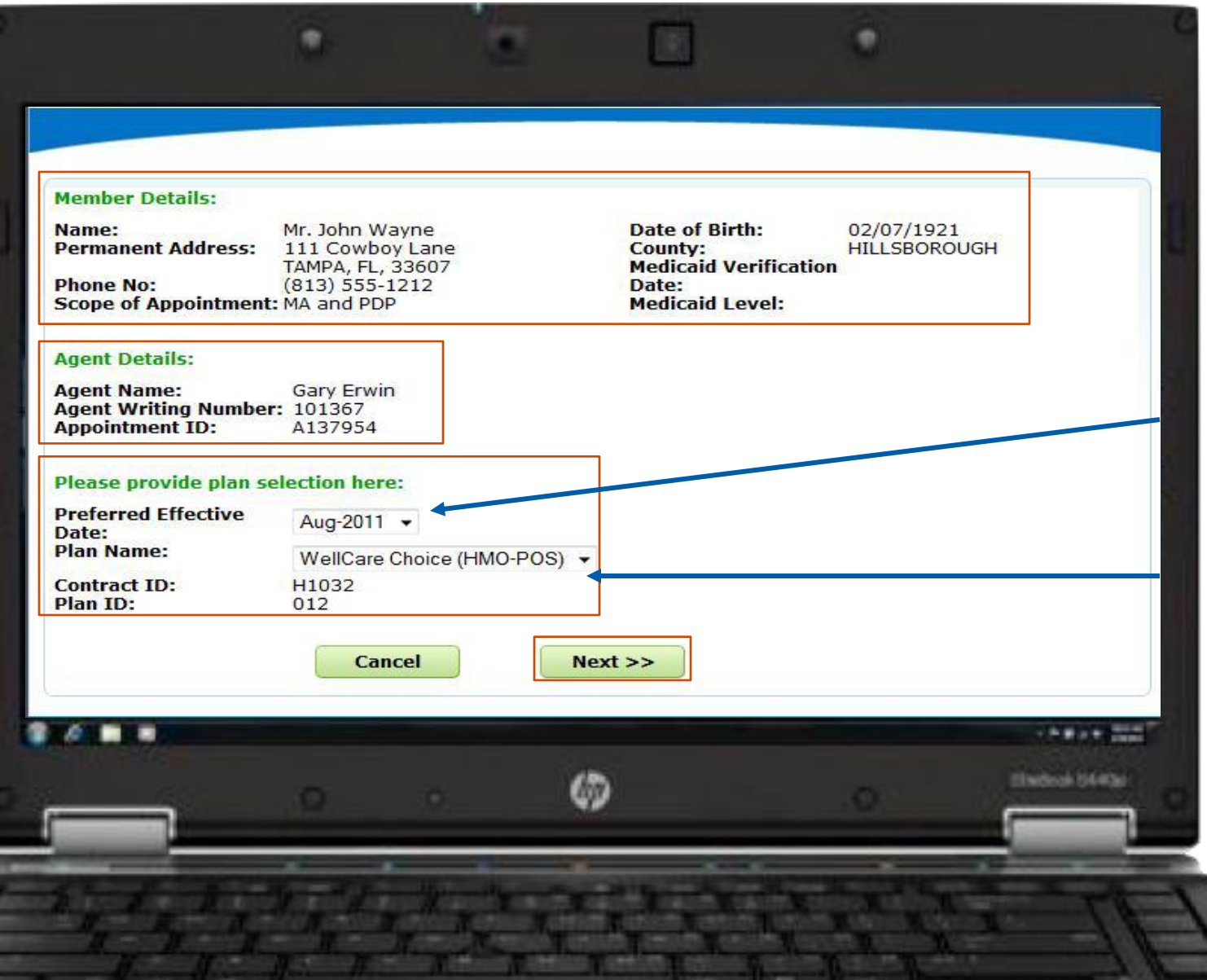
address of appointment

NOTE: contact the Appointment Verification Line if you do not know your Agent ID or Appointment ID

click "Next" to enter the enrollment portal

Online Enrollment

Step-by-Step



Step 2

application

You must verify:

...client information

...agent information

...and plan selection *(pre-determined by Scope of Appointment)*

Select the Preferred Effective Date from the drop down list requested by the beneficiary.

Select the Plan from the drop down list requested by the beneficiary.

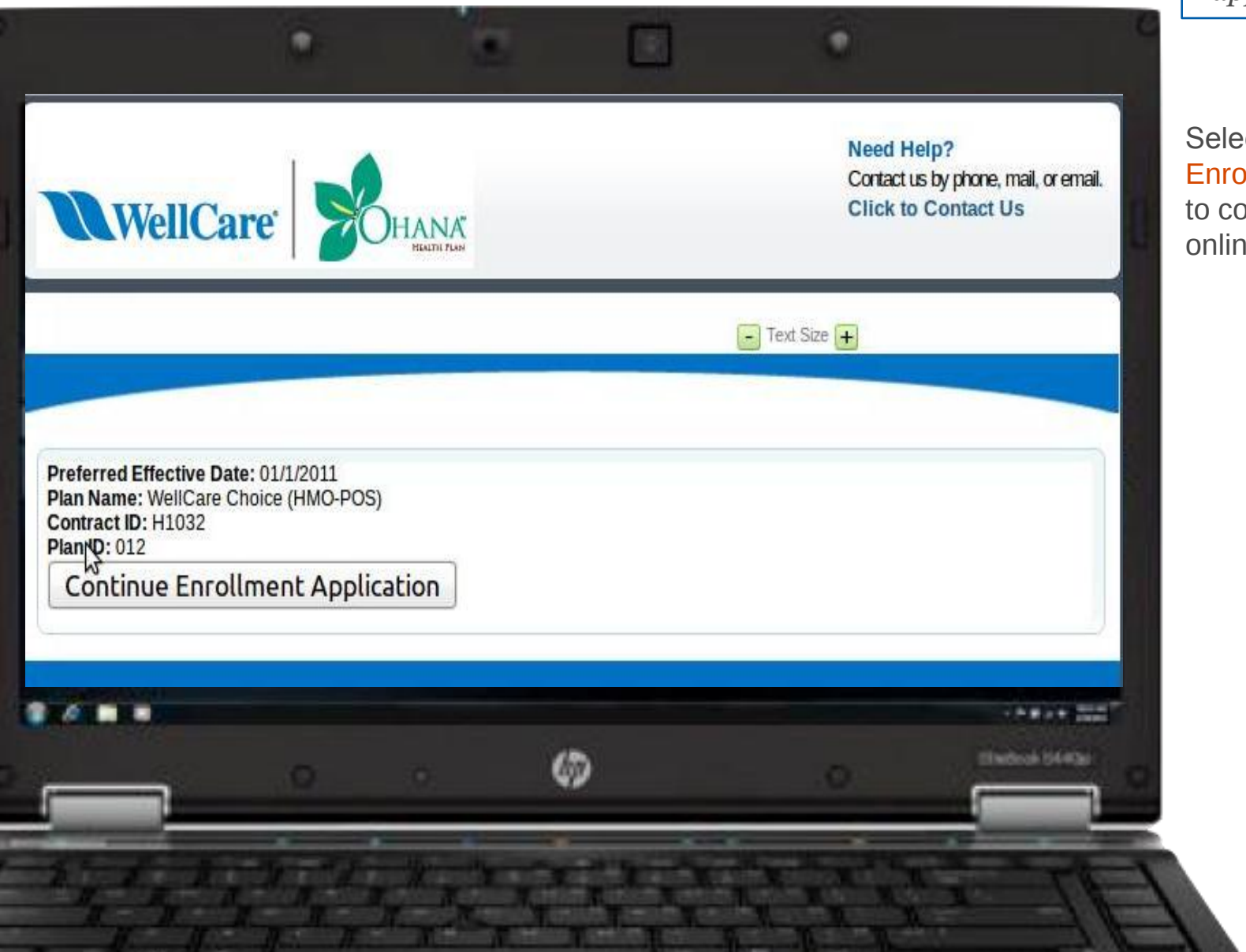
Click "Next" to begin the online application

Online Enrollment

Step-by-Step

Step 2

application



Select "Continue Enrollment Application" to complete the online application

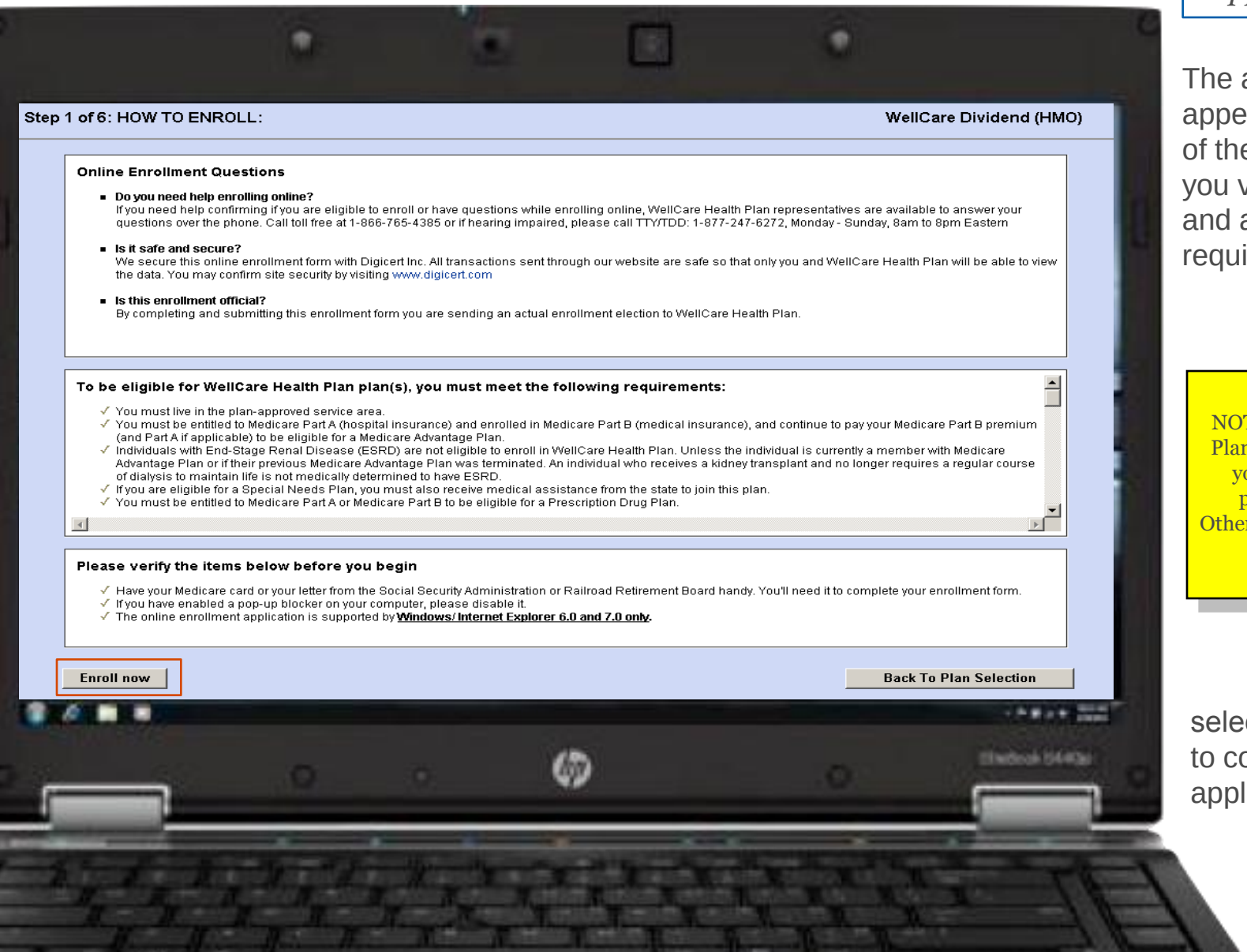
Online Enrollment

Step-by-Step

Step 2

application

The application appears. This portion of the process helps you verify eligibility and any technical requirements

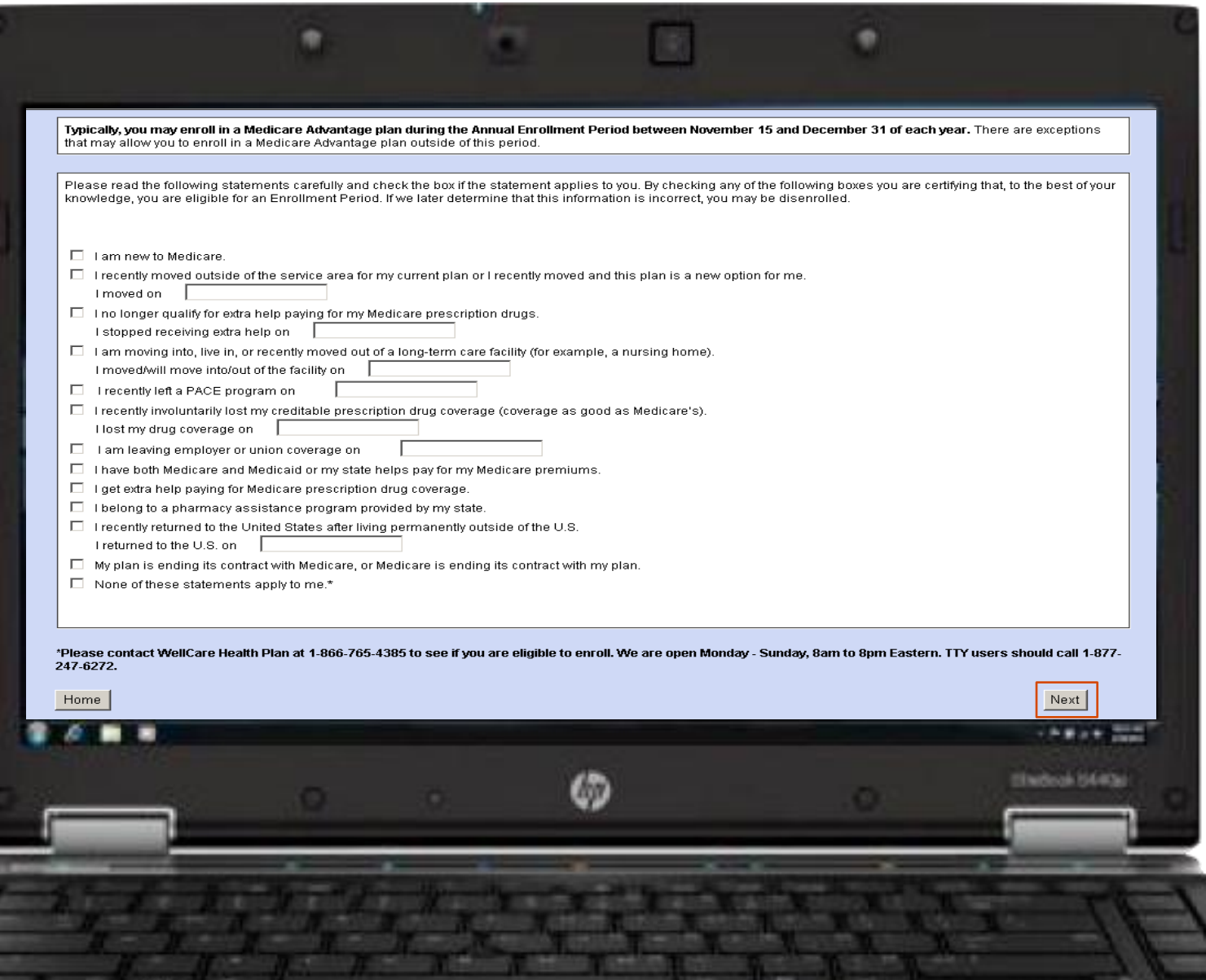


NOTE: Selecting "Back to Plan Selection" will return you to DRx where the process begins over. Otherwise, you should select "Enroll Now"

select "Enroll Now" to continue the application

Online Enrollment

Step-by-Step



Step 2

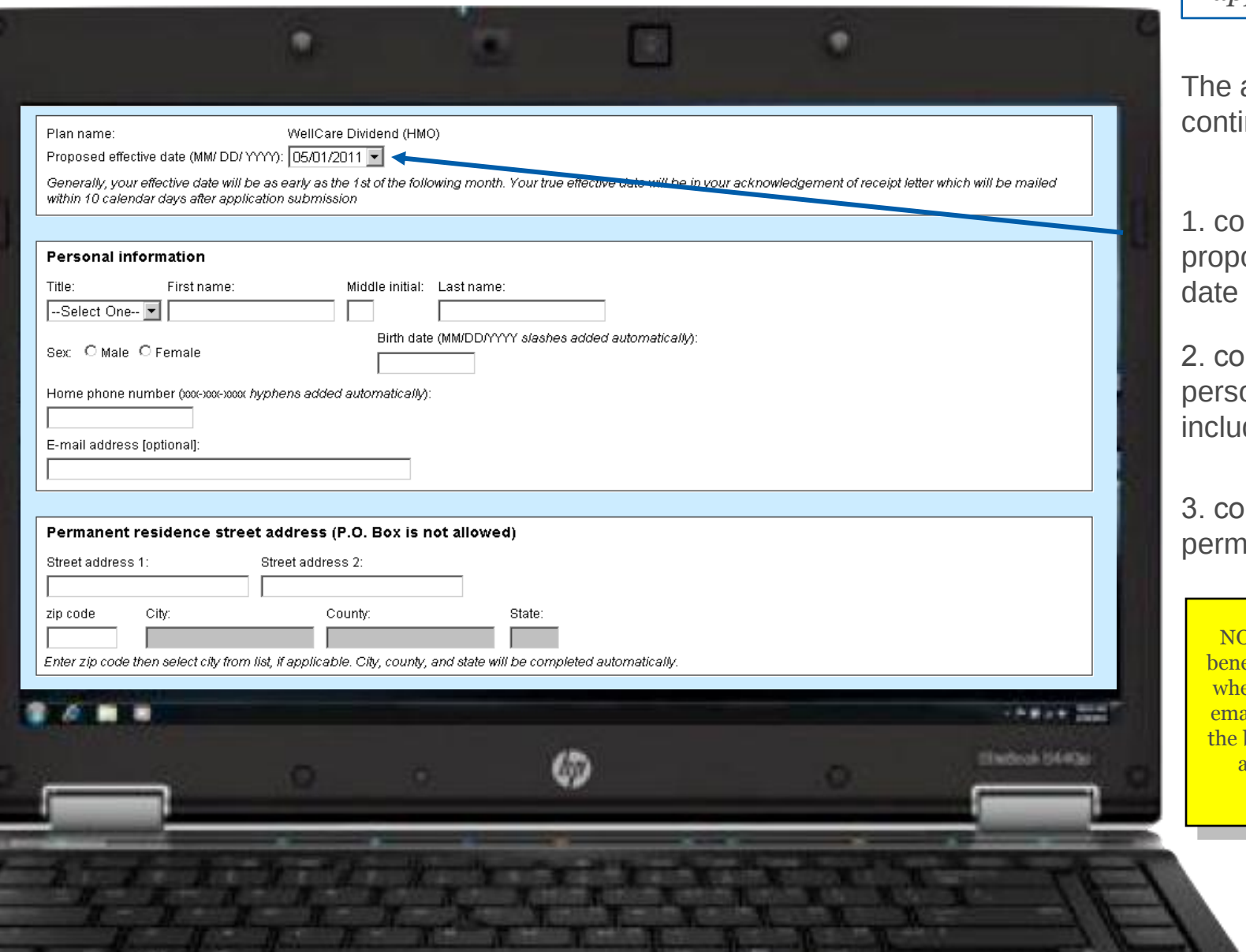
application

The application continues. You must confirm choices that apply to or describe your prospective member.

click “Next” to continue the application.

Online Enrollment

Step-by-Step



Step 2

application

The application continues. You must:

1. confirm the proposed effective date

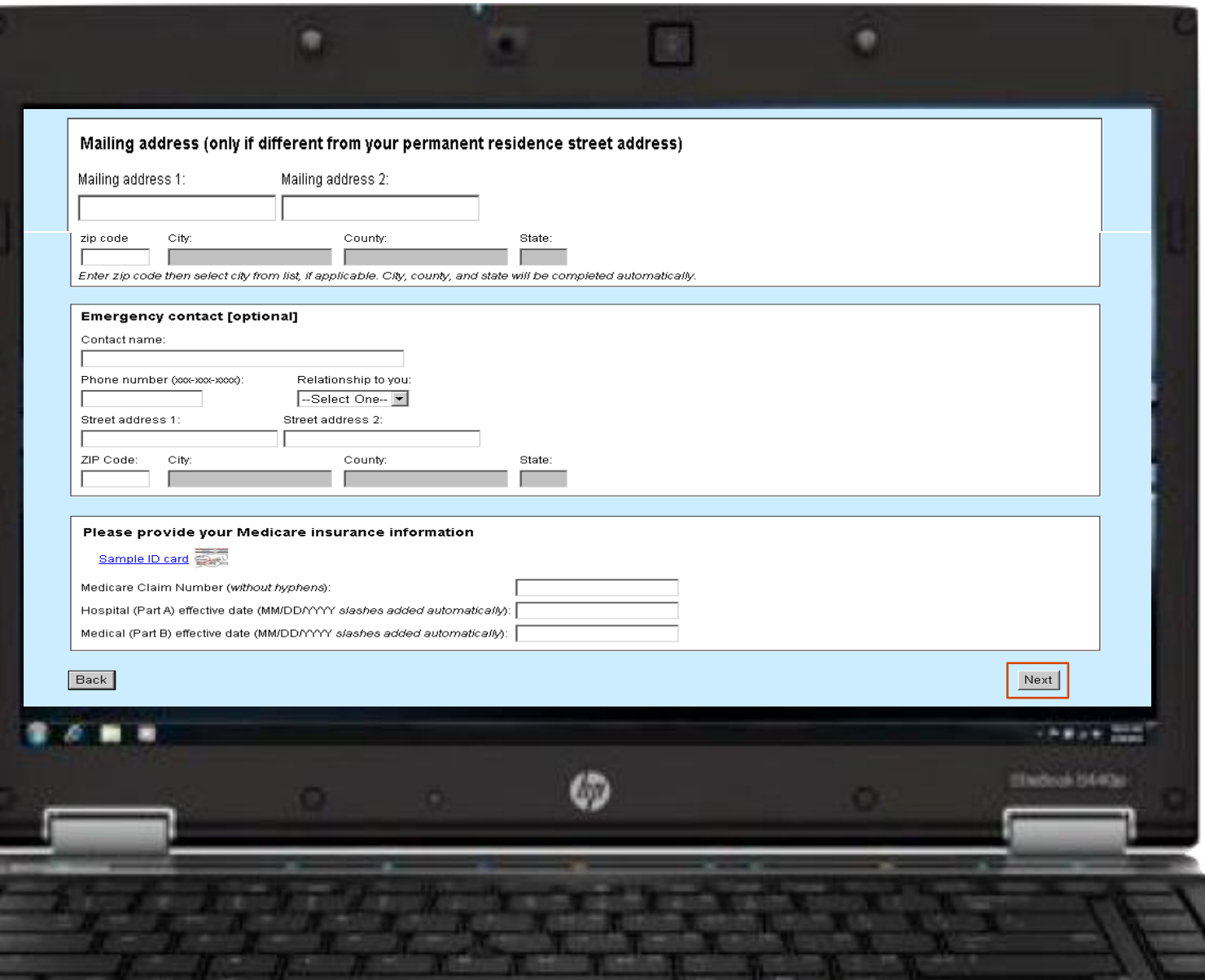
2. confirm beneficiary's personal information, including email*

3. confirm beneficiary's permanent address

NOTE: Please enter the beneficiary's email address when available. When an email address is provided, the beneficiary will be sent an email confirming enrollment.

Online Enrollment

Step-by-Step



Step 2

application

The application continues. You must enter:

1. mailing address *(only if different than permanent address)*

2. emergency contact *(optional)*

3. beneficiary's Medicare information

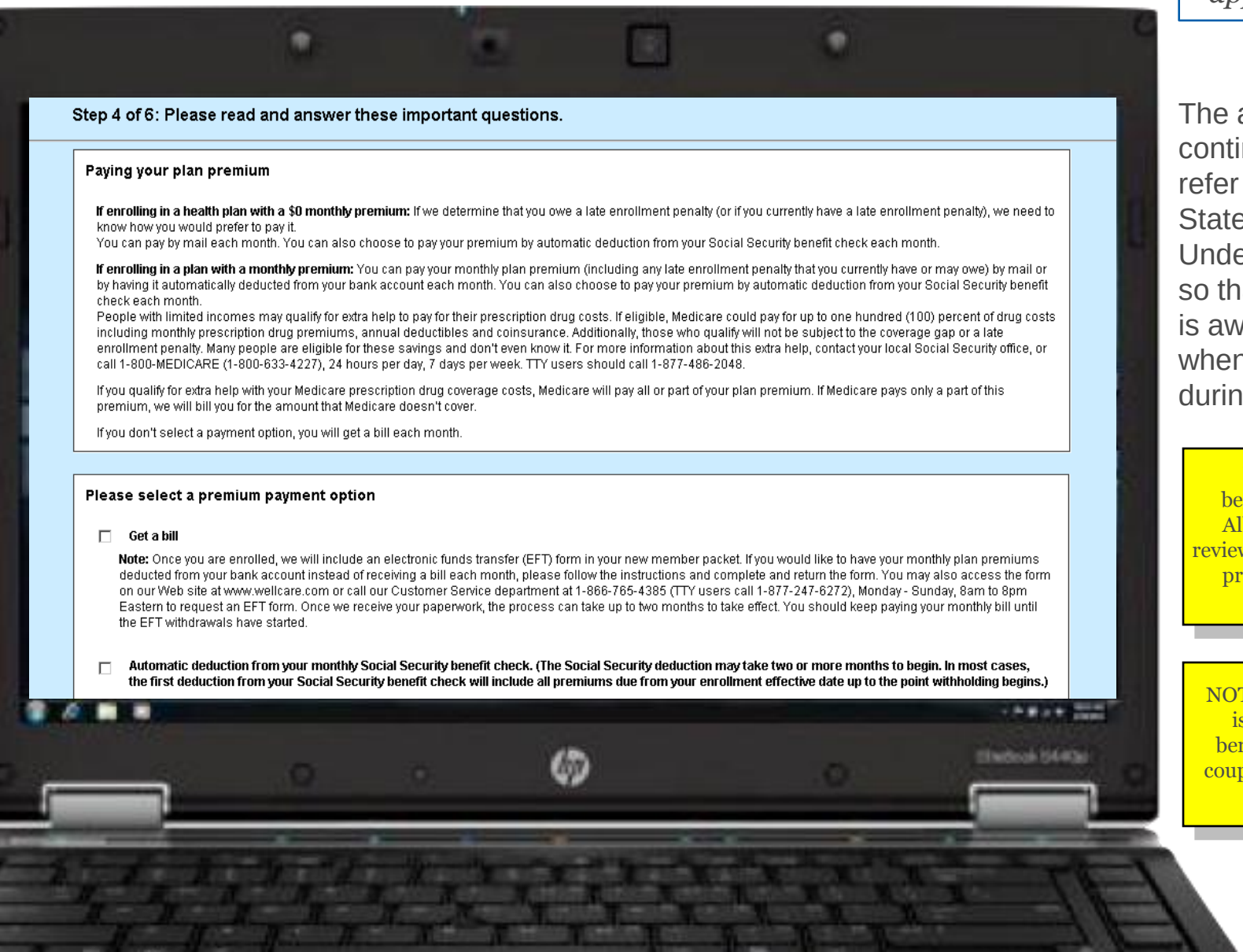
click "Next" to continue the application.

Online Enrollment

Step-by-Step

Step 2

application



The application continues. You must refer to disclaimers as Statements of Understanding (SOU) so that the beneficiary is aware of SOUs when referenced during the EPAV call.

NOTE: This is the beginning of the SOUs. All SOU pages must be reviewed with the beneficiary prior to submitting the application.

NOTE: WellCare does not issue monthly bills – beneficiaries can receive coupon books to send with payments.

Online Enrollment

Step-by-Step

Step 2

application

The application continues. Ask the beneficiary if he/she has:

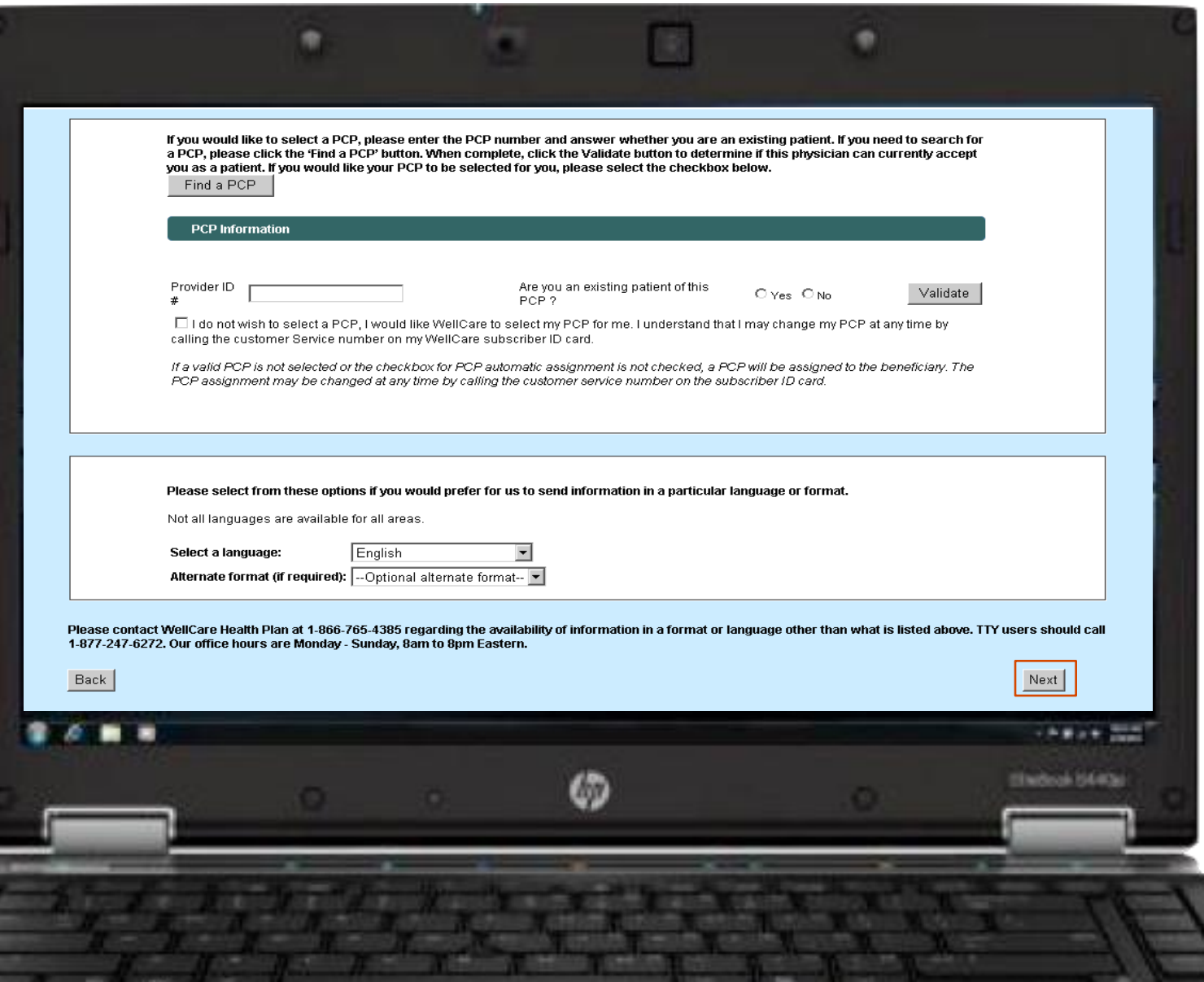
- ESRD
- Other coverage
- Long Term Care
- State Medicaid
- Working Spouse
- Medicare Savings Program

Online Enrollment

Step-by-Step

Step 2

application



The application continues. You must help the beneficiary select:

1. a Primary Care Provider (PCP)

2. preferred language for materials to be sent to beneficiary

NOTE: Do not select "Alternative Format" Call Customer Service for alternate materials.

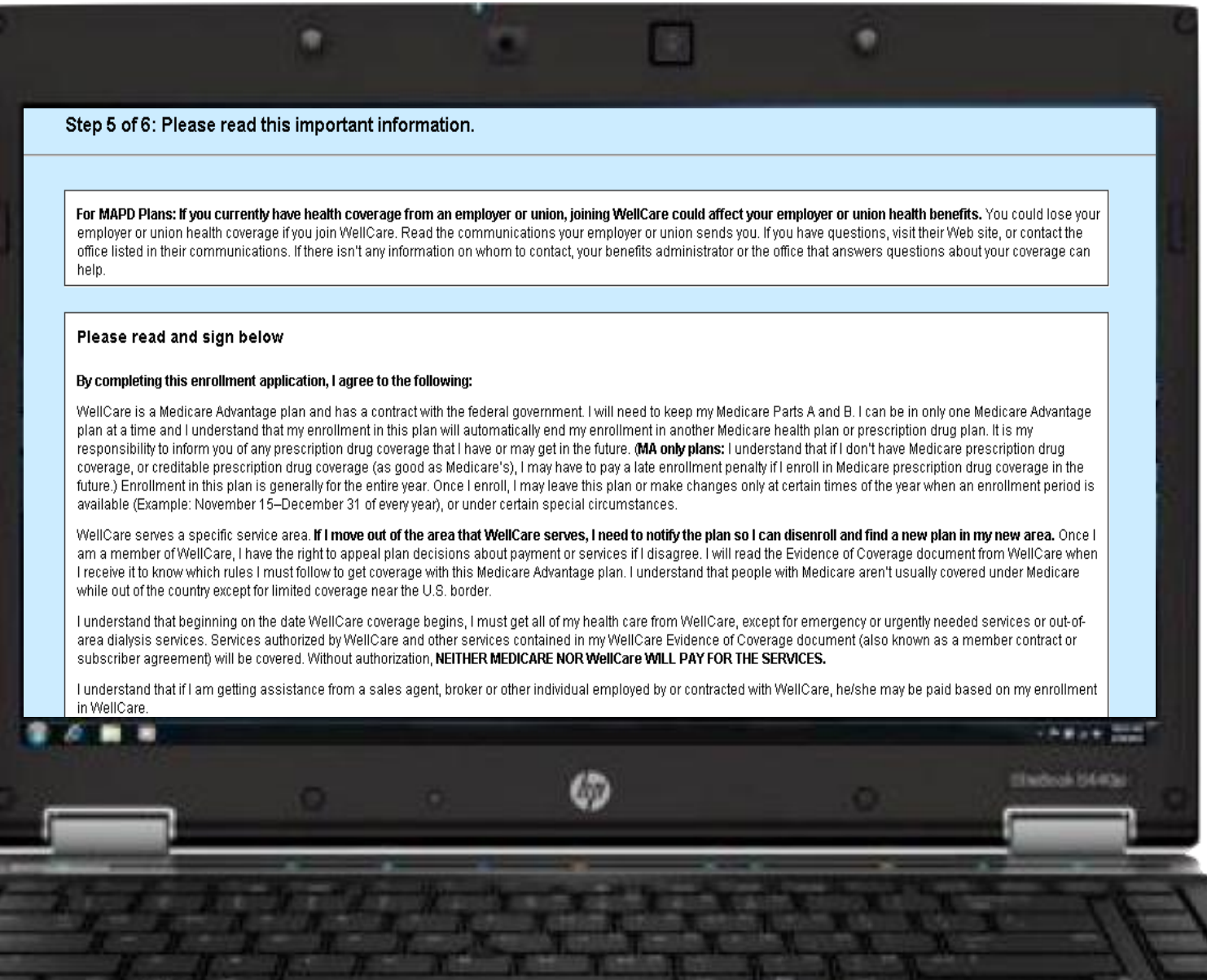
click "Next" to continue the application.

Online Enrollment

Step-by-Step

Step 2

application

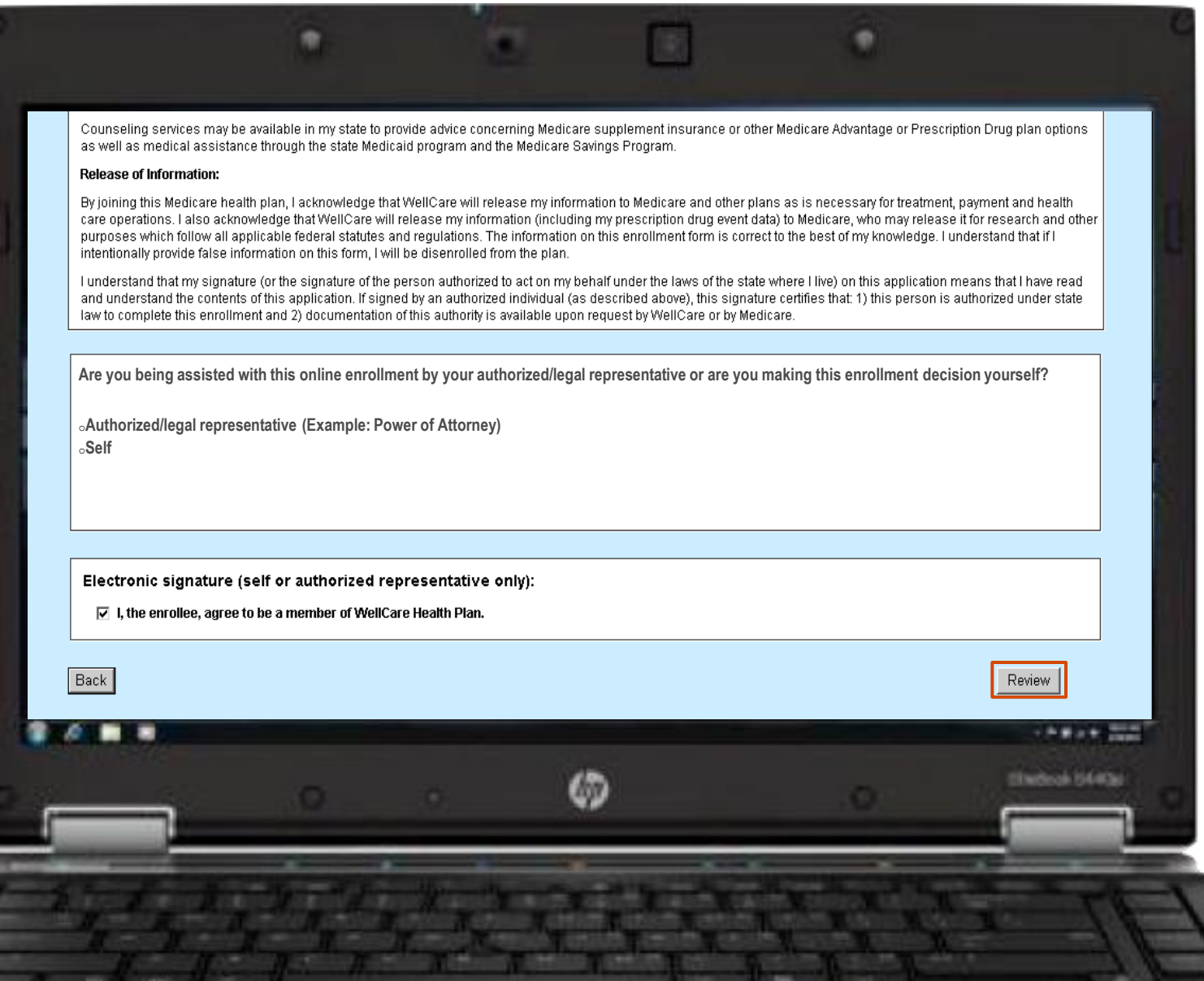


This section of the application contains more Statements of Understanding (SOU).

Please review each SOU with the beneficiary and refer to the statements collectively as “Statements of Understanding” to reinforce their understanding during the EPAV call.

Online Enrollment

Step-by-Step



Step 2

application

The application continues, and...

The beneficiary must now agree to enroll and confirm they are making this enrollment decision (second option).

Otherwise, if the POA is assisting in the enrollment, select the first option.

NOTE: The beneficiary or POA must select the "Electronic signature" box on their own.

Click "Review" to review the application.

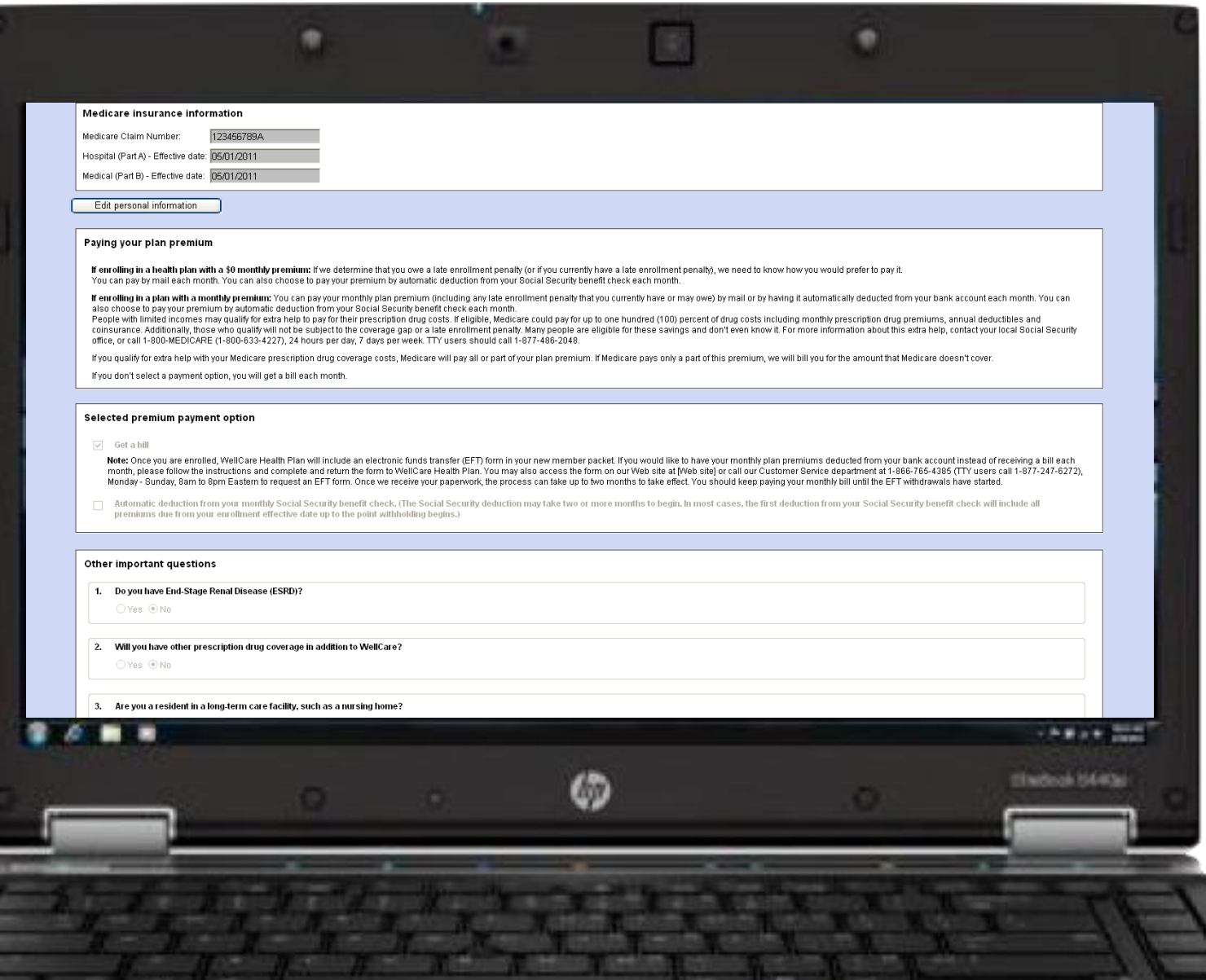
Online Enrollment

Step-by-Step

Step 2

application

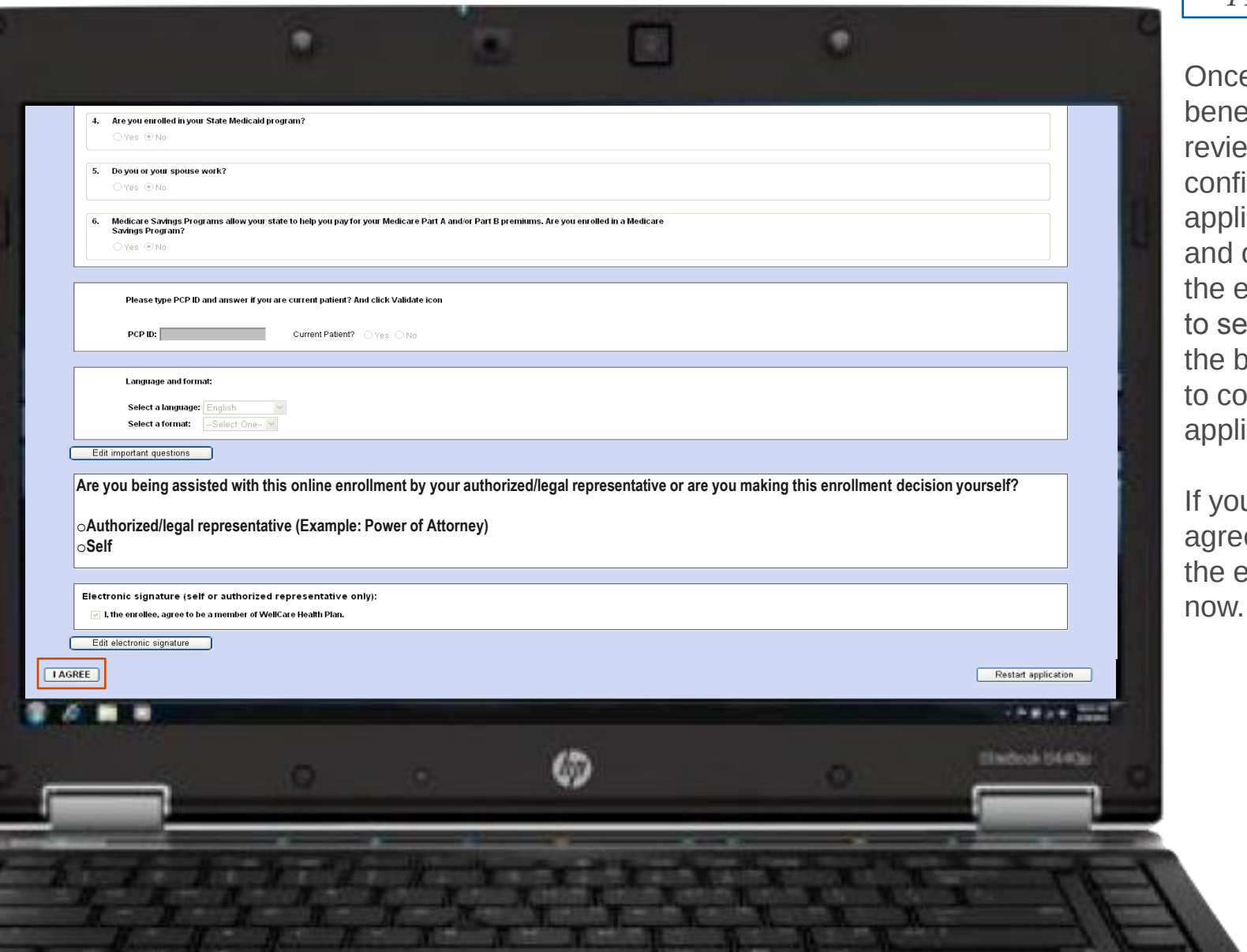
You can now review and edit the online application and select payment options.



NOTE: This section of the application contains additional SOUS. Each SOU must be reviewed with the beneficiary prior to submitting the application.

Online Enrollment

Step-by-Step



Step 2

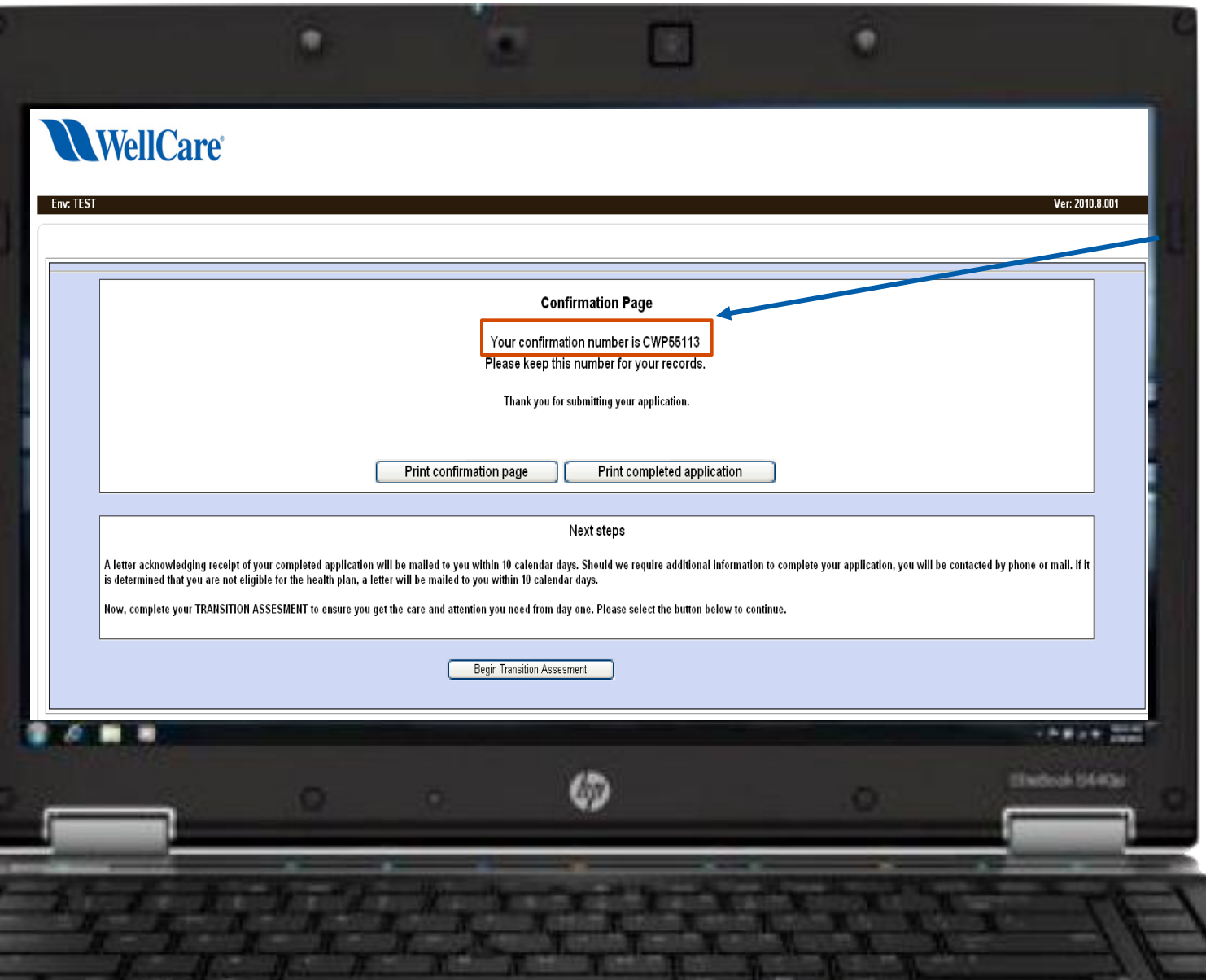
application

Once you and the beneficiary have reviewed and confirmed the application is accurate and complete, instruct the enrollee (or POA) to select "I Agree" at the bottom of the form to complete the application.

If your client does not agree you must end the enrollment process now.

Online Enrollment

Step-by-Step



Step 2

application

The application is complete!

Write down the confirmation number and prompt the beneficiary to write this number in their Member Roadmap.

You can now exit the application and initiate an EPAV call to WellCare Customer Service.

NOTE: Remember to write down the confirmation number. You will need this number during the EPAV process when requested by the Customer Service agent.

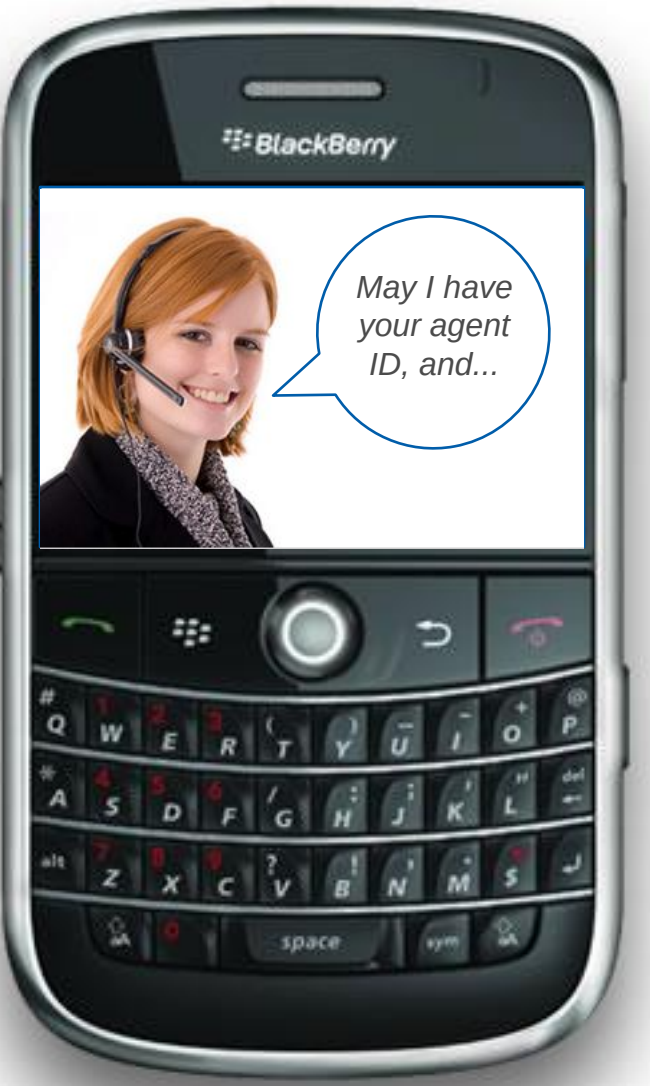
How to complete EPAV

An EPAV is completed after every online enrollment. This process verifies both the accuracy of the application and confirms the member's willingness to enroll.

(click the arrow to begin)

Step 3

verification



2011 CCP/PDP Enrollment Portal Application Verification Process – (EPAV)

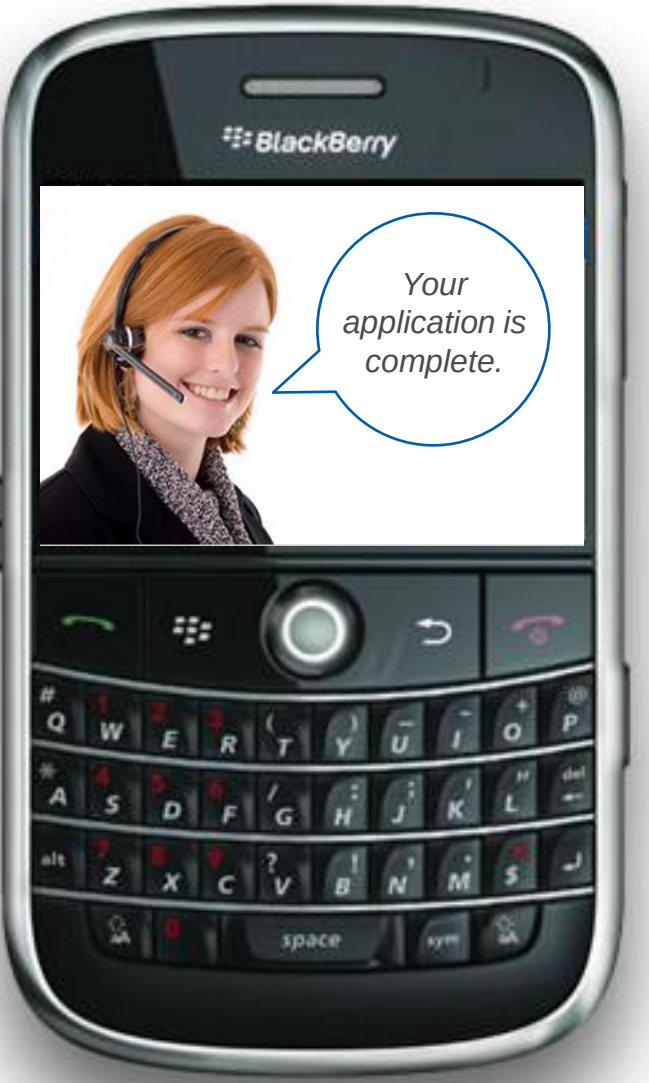
Step 1: Appointment Verification and Address Validation

- Dial **866-915-7670** and select the prompt for the Enrollment Portal Application Verification (EPAV line) to speak to a Customer Service agent and begin the EPAV process
- You will need to provide the appointment ID, your agent ID and the application confirmation number to the representative
- Please verify the enrollee's name

Step 3

verification

2011 CCP/PDP Enrollment Portal Application Verification Process – (EPAV)

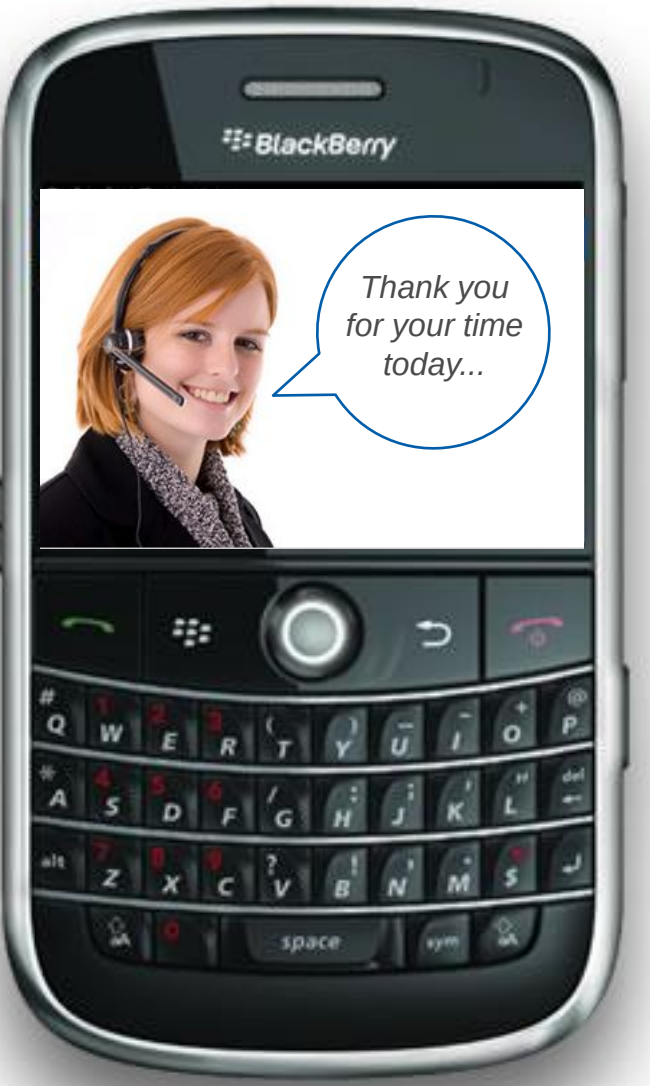


Step 2: Receive Application Status

- If the application is determined to be “complete,” the call will continue
- If application is incomplete or incorrect, the representative will disclose reason and ask you to correct the application as needed

Step 3

verification



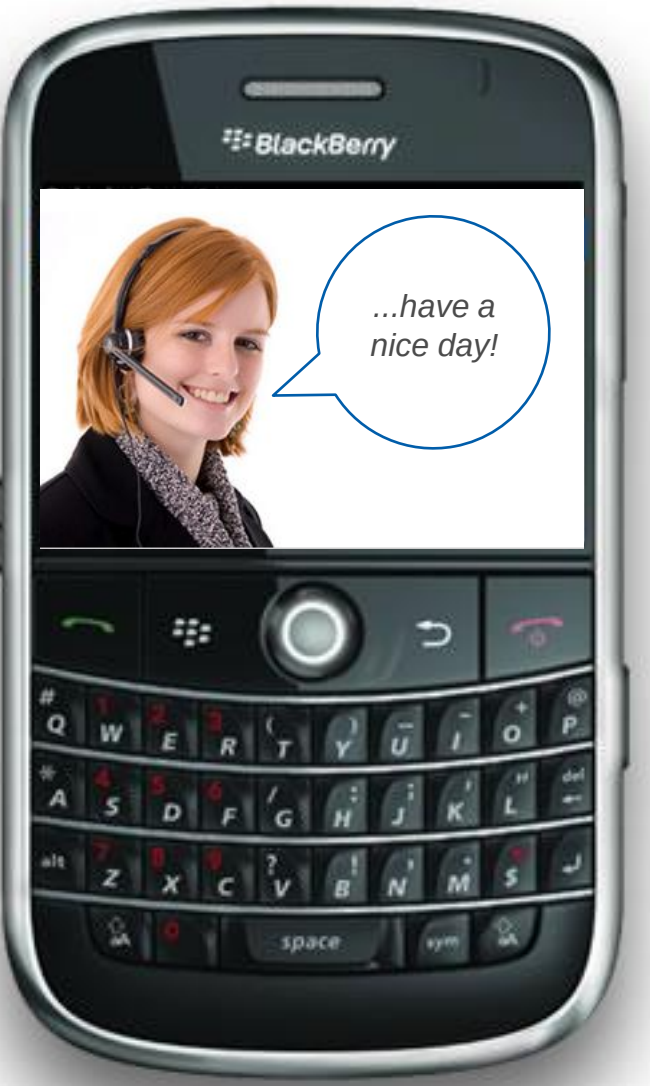
2011 CCP/PDP Enrollment Portal Application Verification Process – (EPAV)

Step 3: Enrollee verification

- The representative will ask to speak to the enrollee and inform them that the call is being recorded
- The representative will determine if the enrollee or POA requires assistance in another language. If yes, the representative will note the language and call the language line
- The representative will then ask the enrollee if they have reviewed and understand the Statement of Understanding and confirm their intent to enroll

Step 3

verification



2011 CCP/PDP Enrollment Portal Application Verification Process – (EPAV)

Step 4: Closing

Once enrolled, the enrollee will be asked to hand the phone back to you. You will be told either:

- ❑ "That completes the enrollment portal application verification process. Thank you for calling and have a nice day."

Or…

- ❑ "The beneficiary indicated they do not intend to enroll in this plan today. Your sales encounter with this prospect has ended. I will move forward with canceling the electronic application."

Summary

During this course
you learned:

How and when to use the
Online Enrollment Portal

The three steps to complete an
online enrollment

The information needed
to complete an “EPAV”

Questions about Online Enrollment?

Thank You!