



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

The screenshot shows the AHIP training center website. The header includes the AHIP logo (America's Health Insurance Plans) and the text "CENTER FOR INSURANCE EDUCATION AND PROFESSIONAL DEVELOPMENT" with the tagline "Learn. Achieve. Succeed." and a "Help" link. The WellCare logo is in the top right corner. The main content area is titled "Marketing Medicare Advantage and Part D Prescription Drug Plans: Understanding Medicare Basics, Plan Types, and Marketing and Enrollment Requirements". It provides a description of the course and lists three bullet points: help beneficiaries understand Medicare fee-for-service eligibility and benefits; help Medicare beneficiaries learn about Medicare Advantage and Part D prescription drug plans, eligibility, and how to get covered services; and marketing and enrollment requirements under the Medicare Advantage and Part D programs. The page also includes a "First time visitors" section with a "Click Here to Register" button, a "Returning Users" section with "Username:" and "Password:" input fields and a "Log In" button, and links for "Forgot password?" and "Forgot username?". A "Quick Links" section lists: AHIP Center for Insurance Education and Professional Development, AHIP HI-WIRE, AHIP HI-WIRE Career Source, and AHIP Conferences. A "Contact Us" section provides the phone number 866.234.6909, the email support@AHIPInsuranceEducation.org, and a link to "Click here to take a short survey". A note states "Please Note: Use Internet Explorer to access content." and the version is listed as 2.0.441.0.

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.

The screenshot shows the AHIP website interface. On the left is a navigation menu with 'Home', 'Training', 'Reporting', and 'Transcript'. The 'Training' option is highlighted with a red box. Below the menu is a 'PHIAS' logo and a 'Health Care Reform Today' announcement. Further down are 'Quick Links' and 'Contact Us' sections. The main content area is titled 'CENTER FOR INSURANCE EDUCATION AND PROFESSIONAL DEVELOPMENT' and 'Learn. Achieve. Succeed.'. It includes a 'Welcome William Brom' message and 'Medicare 2012' information. A list of training modules is shown with checkboxes and completion dates. The 'Training' menu item is highlighted with a red box.

AHIP
America's Health Insurance Plans

Home
Training
Reporting
Transcript

PHIAS

Health Care Reform Today
Click here to learn up to **14 CE credits** and take advantage of a **50% discount** as a thank you for purchasing our Medicare course!

Quick Links
[AHIP Center for Insurance Education and Professional Development](#)
[AHIP Hi-WIRE](#)
[AHIP Hi-WIRE Career Source](#)
[AHIP Conferences](#)

Contact Us
866.234.6909
support@AHIPInsuranceEducation.org
[Click here to take a short survey](#)
Please Note: Use Internet Explorer to access content.
Version: 2.0.441.0

CENTER FOR INSURANCE EDUCATION AND PROFESSIONAL DEVELOPMENT
Help My Profile Logout

WellCare

Learn. Achieve. Succeed.

Welcome William Brom

Medicare 2012

This online format allows you to study at your own pace by viewing learning modules made up of PowerPoint slides interspersed with review questions and culminated with a practice quiz, which is designed to reinforce learning and prepare you for the Final Exam.

Instructions
Please complete Parts 1 through 5 and complete the Final Exam.
Please press F5 to refresh this page after completion of each Part for your checkmark to display. Please note that it can take up to 10 seconds for the completion to show.

ONCE YOU HAVE A FINAL EXAM COMPLETION CHECKMARK: Please check with your affiliated companies to verify the appropriate method of transmitting your training results.

REQ = Required REC = Recommended

	Date Completed
<input type="checkbox"/> REQ Part 1 - Overview of Medicare Program Basics: Choices, Eligibility, and Benefits To print slides from this module select English or Spanish	
<input type="checkbox"/> REQ Part 2 - Medicare Health Plans To print slides from this module select English or Spanish	
<input type="checkbox"/> REQ Part 3 - Medicare Part D Prescription Drug Coverage To print slides from this module select English or Spanish	
<input type="checkbox"/> REQ Part 4 - Marketing Medicare Advantage and Part D Plans To print slides from this module select English or Spanish	
<input type="checkbox"/> REQ Part 5 - Enrollment Guidance for Medicare Advantage and Part D Plans To print slides from this module select English or Spanish	
<input type="checkbox"/> REQ Medicare Final Exam The final exam can't be launched until all required training modules are completed.	

2012 AHIP Certification Process

View Certificate

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

The screenshot shows the AHIP website interface. On the left, a navigation menu has 'Transcript' highlighted with a red box. The main content area is titled 'Medicare 2012' and includes instructions for using the online format, a list of required training modules, and a 'Date Completed' table.

Center for Insurance Education and Professional Development
Learn. Achieve. Succeed.

Welcome William Brom
Medicare 2012

This online format allows you to study at your own pace by viewing learning modules made up of PowerPoint slides interspersed with review questions and culminated with a practice quiz, which is designed to reinforce learning and prepare you for the Final Exam.

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REQ = Required REC = Recommended

	Date Completed
<input type="checkbox"/> REQ Part 1 - Overview of Medicare Program Basics: Choices, Eligibility, and Benefits To print slides from this module select English or Spanish	
<input type="checkbox"/> REQ Part 2 - Medicare Health Plans To print slides from this module select English or Spanish	
<input type="checkbox"/> REQ Part 3 - Medicare Part D Prescription Drug Coverage To print slides from this module select English or Spanish	
<input type="checkbox"/> REQ Part 4 - Marketing Medicare Advantage and Part D Plans To print slides from this module select English or Spanish	
<input type="checkbox"/> REQ Part 5 - Enrollment Guidance for Medicare Advantage and Part D Plans To print slides from this module select English or Spanish	
<input type="checkbox"/> REQ Medicare Final Exam The final exam can't be launched until all required training modules are completed.	

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*

AHIP
America's Health Insurance Plans

CENTER FOR INSURANCE EDUCATION AND PROFESSIONAL DEVELOPMENT
Learn. Achieve. Succeed.

Help My Profile Logout

WellCare

Home
Training
Reporting
Transcript

PHIAS
Health Care Reform Today
Click here to earn up to 14 CE credits and take advantage of a 50% discount as a thank you for purchasing our Medicare course!

Quick Links
AHIP Center for Insurance Education and Professional Development
AHIP HI-WIRE
AHIP HI-WIRE Career Source
AHIP Conferences

Contact Us
866.234.6909
support@AHIPInsuranceEducation.org
Click here to take a short survey
Please Note: Use Internet Explorer to access content.
Version: 2.0.441.0

Welcome William Brom

My Transcript View Transcript for Year: 2012

The section below shows the completion progress of your current enrollment package. If you have not completed any modules or have re-enrolled after failing the exam 3 times, this section will be blank.

Recert = No = You have been placed in the standard certification learning track.
Recert = Yes = You have been placed in the re-certification learning track.

AHIP Status:								
Recert	State	Part 1	Part 2	Part 3	Part 4	Part 5	Final Exam	Score
NO	FL							

The section below shows the attempts you've used/made on the Final Exam.

AHIP Exam Data:			
Final Exam	Date of Attempt	Score	Completion Date

The section below shows the completion history for all modules.

AHIP Module Data:	
Module	When Completed

Print My Receipt

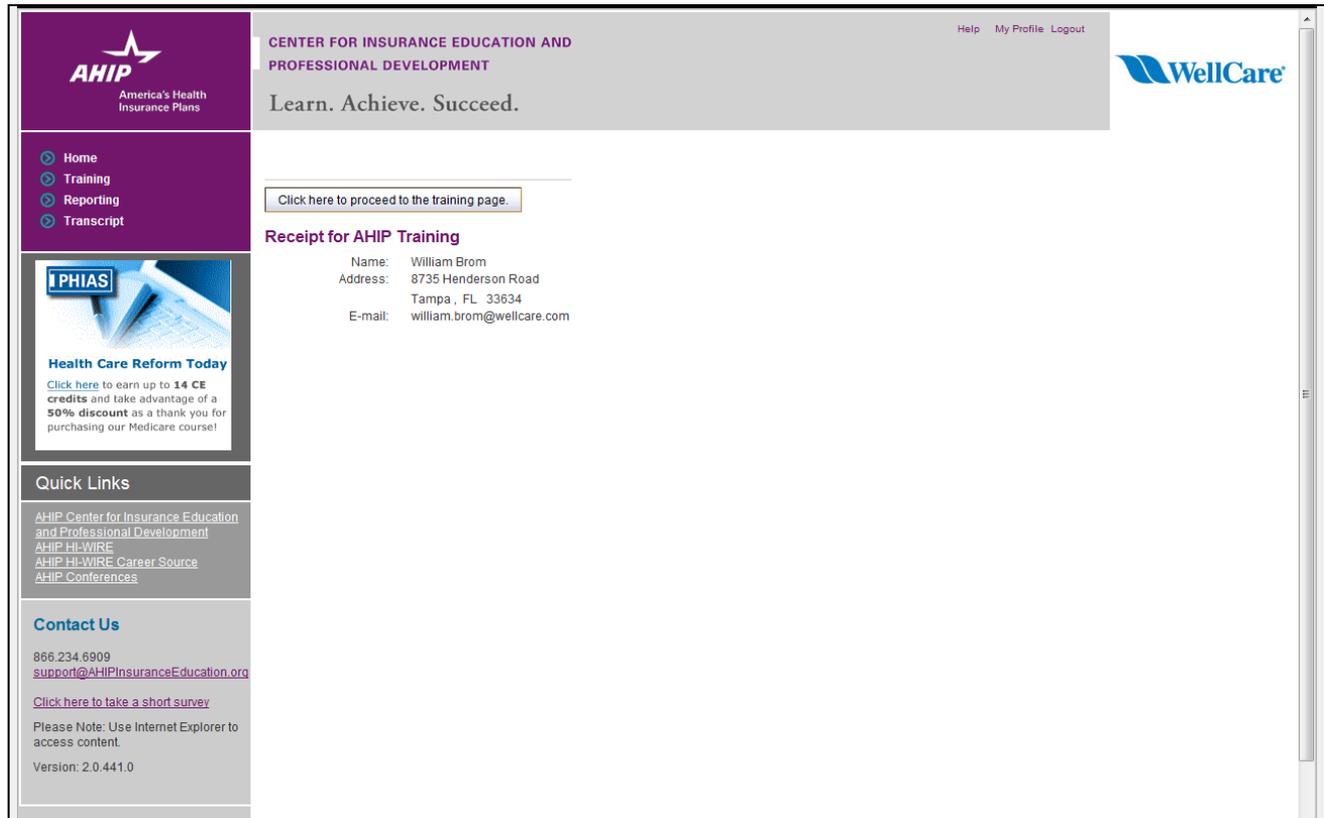
2012 AHIP Certification Process

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.



The screenshot shows the AHIP website interface. At the top left is the AHIP logo with the tagline "America's Health Insurance Plans". To the right is the header for the "CENTER FOR INSURANCE EDUCATION AND PROFESSIONAL DEVELOPMENT" with the slogan "Learn. Achieve. Succeed." and a "WellCare" logo. A navigation menu on the left includes links for Home, Training, Reporting, and Transcript. A central button reads "Click here to proceed to the training page." Below this is a "Receipt for AHIP Training" section with the following details: Name: William Brom, Address: 8735 Henderson Road, Tampa, FL 33634, E-mail: william.brom@wellcare.com. A "Quick Links" section lists: AHIP Center for Insurance Education and Professional Development, AHIP HI-WIRE, AHIP HI-WIRE Career Source, and AHIP Conferences. A "Contact Us" section provides the phone number 866.234.6909, the email support@AHIPInsuranceEducation.org, and a link to "Click here to take a short survey". A note at the bottom states "Please Note: Use Internet Explorer to access content." and the version number "Version: 2.0.441.0".

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

WELLCARE UNIVERSITY
Learning Management System

HOME
.....
FAQ's
.....
SYSTEM CHECK
.....
CONTACT TECHNICAL SUPPORT

Login
User ID

Password

Login

WellCare University - Welcome

Welcome to WellCare University, your single point of access to all your WellCare training needs. Here is what you will find inside:

Professional Development - WellCare University offers a full range of courses that supports various professional development curricula including courses targeted specifically toward communications, project management, customer service, management & leadership, desktop computer...just to name a few! (Available to WellCare Associates Only)

Company Wide Required Training - All WellCare mandatory training is grouped in the Mandatory Enterprise Training catalog, making it easy for you to stay compliant.

Departmental Training - Courses, surveys and exams are grouped in departmental catalogs for easy identification.

WellCare University is available to you 24 hours a day, 7 days week, through any computer with an internet connection. Please Note: You must access this system outside of Citrix.

Log In Directions

DO NOT LOG IN THROUGH CITRIX

You must open a new browser screen outside Citrix and use the following address: <http://www.wellcareuniversity.com/>

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”

WELLCARE UNIVERSITY
Learning Management System

Welcome, _____

Home Page
Training Catalog

User Profile
Contact Tech Support
Computer Configuration
Logout

Home Page

My Current Training My Training Transcript

Searching for Courses is Now Easier than Ever!
There are two main choices for finding courses in the system. First, you can navigate through the catalogs using the Browse feature, or you can search directly using the Find tab.

Personalizing Your System
Several features are available to customize the appearance and language of the system to better match your needs, and the most significant of these are configurable using the User Profile link.

RSS feed

Find Training
Keyword(s)

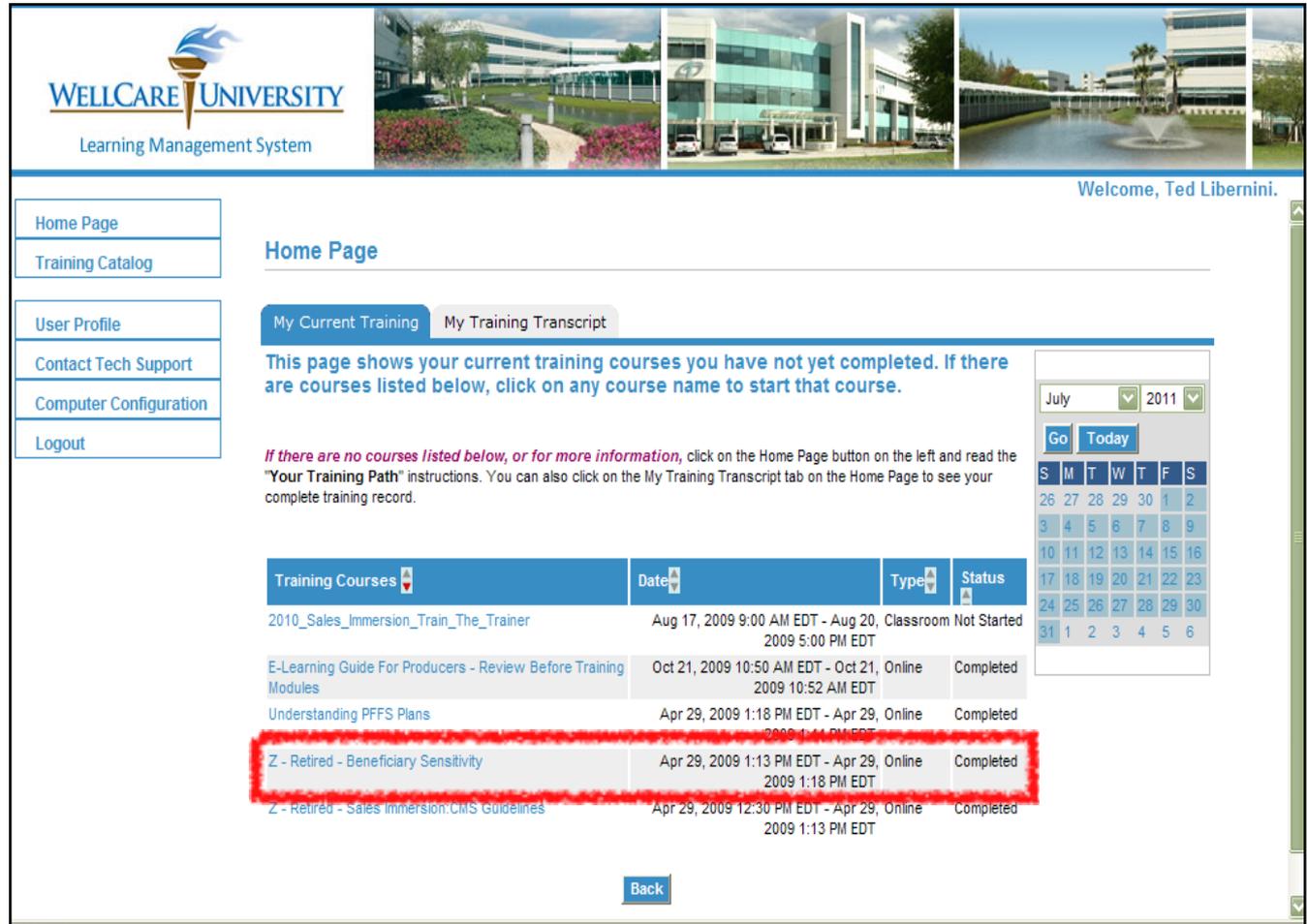
Learning Type
All

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**”



WELLCARE UNIVERSITY
Learning Management System

Welcome, Ted Libernini.

Home Page

Training Catalog

User Profile

Contact Tech Support

Computer Configuration

Logout

Home Page

My Current Training My Training Transcript

This page shows your current training courses you have not yet completed. If there are courses listed below, click on any course name to start that course.

If there are no courses listed below, or for more information, click on the Home Page button on the left and read the "Your Training Path" instructions. You can also click on the My Training Transcript tab on the Home Page to see your complete training record.

Training Courses	Date	Type	Status
2010_Sales_Immersion_Train_The_Trainer	Aug 17, 2009 9:00 AM EDT - Aug 20, 2009 5:00 PM EDT	Classroom	Not Started
E-Learning Guide For Producers - Review Before Training Modules	Oct 21, 2009 10:50 AM EDT - Oct 21, 2009 10:52 AM EDT	Online	Completed
Understanding PFFS Plans	Apr 29, 2009 1:18 PM EDT - Apr 29, 2009 1:18 PM EDT	Online	Completed
Z - Retired - Beneficiary Sensitivity	Apr 29, 2009 1:13 PM EDT - Apr 29, 2009 1:18 PM EDT	Online	Completed
Z - Retired - Sales Immersion: CMS Guidelines	Apr 29, 2009 12:30 PM EDT - Apr 29, 2009 1:13 PM EDT	Online	Completed

Back

July 2011

Go Today

S	M	T	W	T	F	S
26	27	28	29	30	1	2
3	4	5	6	7	8	9
10	11	12	13	14	15	16
17	18	19	20	21	22	23
24	25	26	27	28	29	30
31	1	2	3	4	5	6

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

Knowledge Center

E-Learning Guide For Producers - Review Before Training Modules

Main

No news announcements are assigned to this learning module at this time, but updates are always in process, so be sure to check back.

Learning Module	Date	Venue	Learning Types	
E-Learning Guide For Producers - Review Before Training Modules	Oct 21, 2009 10:50 AM EDT - Oct 21, 2009 10:52 AM EDT		Online	Start Training

Click [here](#) to remove this course from your home page active courses listing.

This learning activity currently has an overall status of: **COMPLETED**

Completed -- For instructor led activities, your instructor will mark you **COMPLETED** if all requirements are met. For online courses that meet e-learning standards, the course will be marked "completed" automatically when requirements are met.

Finished Using -- Some online courses are not created using e-learning standard tools. As a result, the course cannot automatically mark you "completed". In these instances, you will need to mark the course finished when you are done. You may also use mark online courses that you did not need to or wish to complete.

Score -- For online courses, the score shown in your records and transcripts may represent either a percent of the total course exams, or the results of the latest exam, as the score reporting is courseware dependent.

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

The screenshot displays the 'E-Learning Guide For Producers - Review Before Training Modules' interface. The top right corner features an 'EXIT' button highlighted with a red box. The left sidebar contains an 'Outline' menu with the following items: 1. The WellCare Producers Guide to E-Learning (highlighted), 2. Welcome to WellCare's 2010 Producer Training, 3. What to Expect From This Module, 4. WellCare's Sales Immersion Training Overview, 5. WellCare's Sales Immersion Training Modules, 6. Important: Learner's Guides, 7. Important: Learner's Guides, cont., 8. Testing Requirements, and 9. Helpful Resources. The main content area shows the title 'The WellCare Producers Guide to E-Learning' and the date 'September, 2009'. Below the title is a photograph of a smiling man and a young girl. The WellCare logo is visible in the bottom right corner. At the bottom of the interface, there are navigation controls including a play/pause button and a volume icon.

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

The screenshot displays the WellCare E-Learning interface. On the left is a navigation menu with an 'Outline' section containing the following items:

- 1. The WellCare Producers Guide to E-Learning
- 2. Welcome to WellCare's 2010 Producer Training
- 3. What to Expect From This Module
- 4. WellCare's Sales Immersion Training Overview
- 5. WellCare's Sales Immersion Training Modules
- 6. Important Learner's Guides
- 7. Important Learner's Guides, cont.
- 8. Testing Requirements
- 9. Helpful Resources

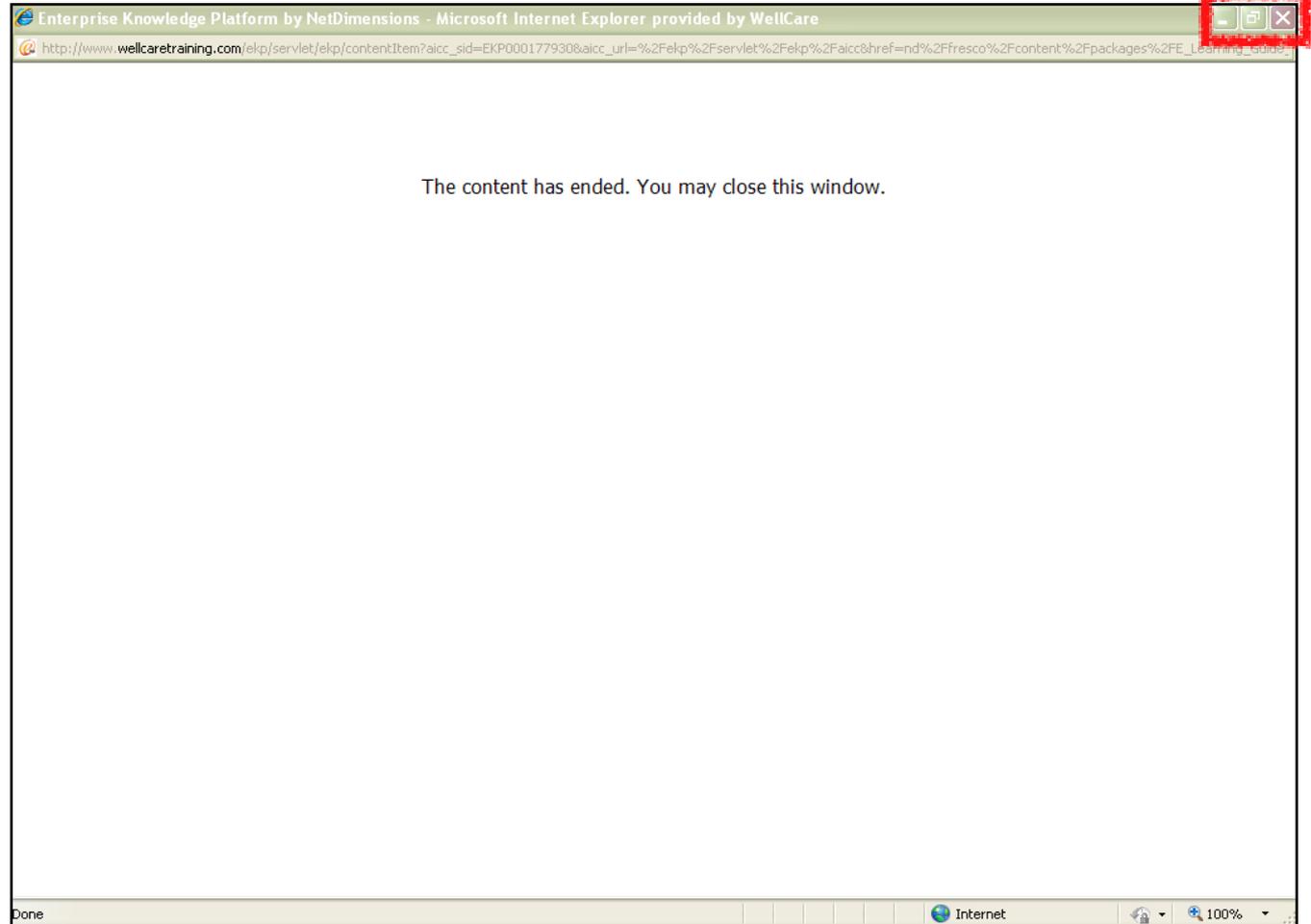
The main content area shows a presentation titled "EXIT PRESENTATION" with the text: "Use this tool to exit the presentation" and "Click 'Exit now' to end and close this presentation." A red dashed box highlights the "Exit now" button in the bottom right corner of the presentation window. The presentation content includes the WellCare logo, the title "The WellCare Producers Guide to E-Learning", the date "September, 2009", and a photo of a smiling man and a young girl. At the bottom of the interface are navigation controls including a play button and a volume icon.

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.



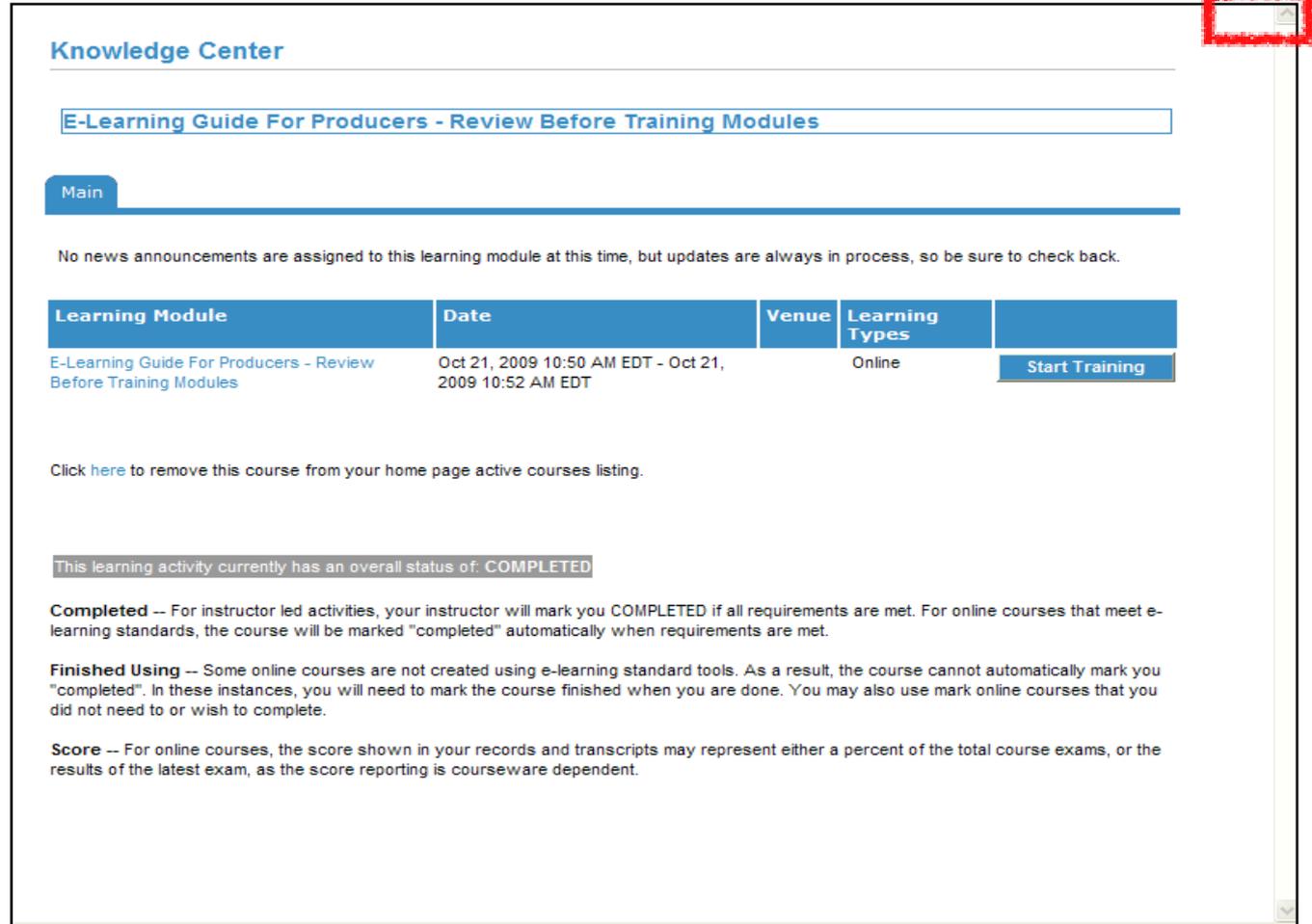
2012 WellCare Certification Process

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)



Knowledge Center

E-Learning Guide For Producers - Review Before Training Modules

Main

No news announcements are assigned to this learning module at this time, but updates are always in process, so be sure to check back.

Learning Module	Date	Venue	Learning Types	
E-Learning Guide For Producers - Review Before Training Modules	Oct 21, 2009 10:50 AM EDT - Oct 21, 2009 10:52 AM EDT		Online	Start Training

Click [here](#) to remove this course from your home page active courses listing.

This learning activity currently has an overall status of: **COMPLETED**

Completed -- For instructor led activities, your instructor will mark you COMPLETED if all requirements are met. For online courses that meet e-learning standards, the course will be marked "completed" automatically when requirements are met.

Finished Using -- Some online courses are not created using e-learning standard tools. As a result, the course cannot automatically mark you "completed". In these instances, you will need to mark the course finished when you are done. You may also use mark online courses that you did not need to or wish to complete.

Score -- For online courses, the score shown in your records and transcripts may represent either a percent of the total course exams, or the results of the latest exam, as the score reporting is courseware dependent.

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

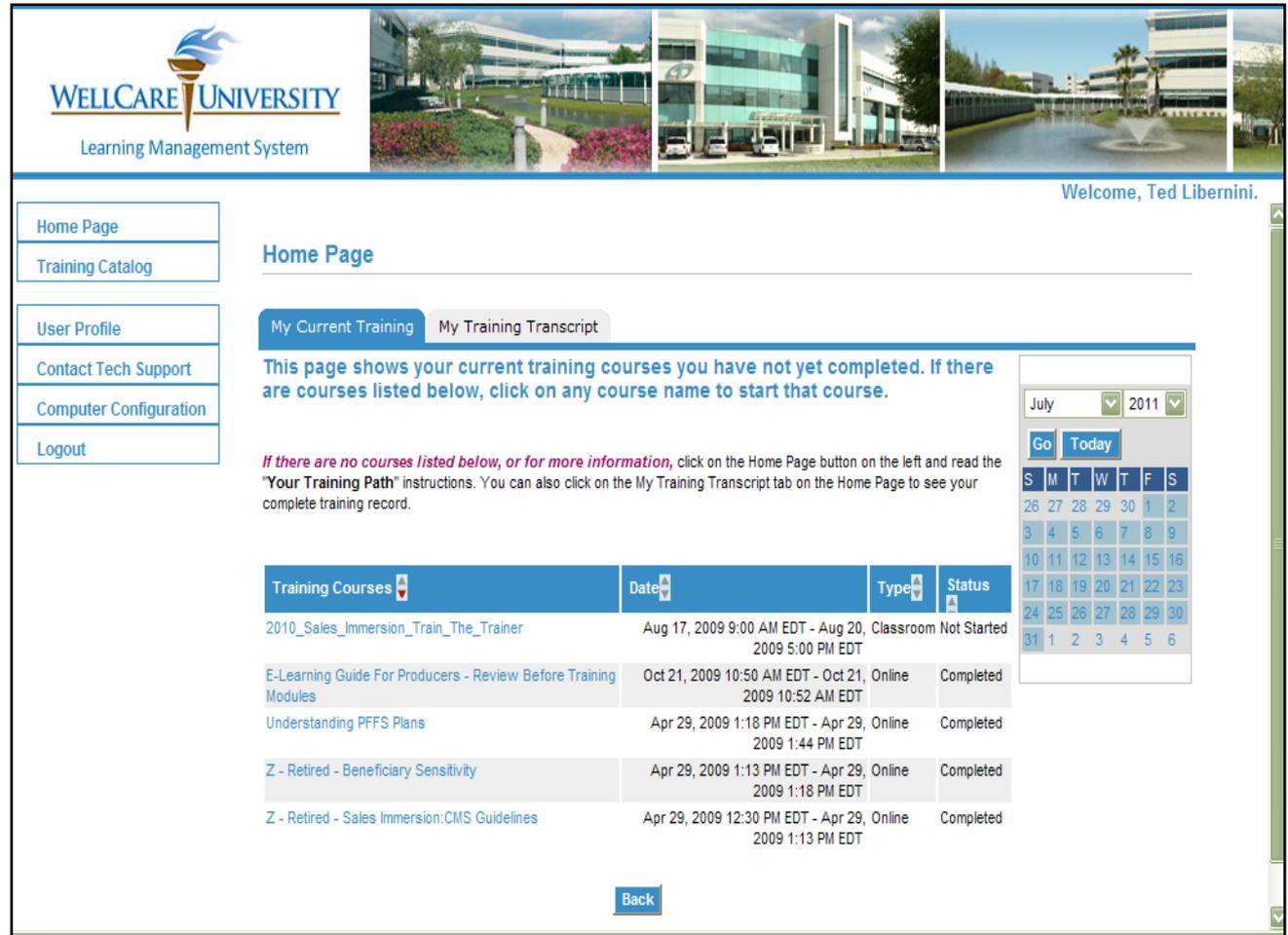
IMPORTANT!

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.



WELLCARE UNIVERSITY
Learning Management System

Welcome, Ted Libernini.

[Home Page](#)
[Training Catalog](#)

[User Profile](#)
[Contact Tech Support](#)
[Computer Configuration](#)
[Logout](#)

Home Page

[My Current Training](#) [My Training Transcript](#)

This page shows your current training courses you have not yet completed. If there are courses listed below, click on any course name to start that course.

If there are no courses listed below, or for more information, click on the Home Page button on the left and read the "Your Training Path" instructions. You can also click on the My Training Transcript tab on the Home Page to see your complete training record.

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Understanding PFFS Plans	Apr 29, 2009 1:18 PM EDT - Apr 29, 2009 1:44 PM EDT	Online	Completed
Z - Retired - Beneficiary Sensitivity	Apr 29, 2009 1:13 PM EDT - Apr 29, 2009 1:18 PM EDT	Online	Completed
Z - Retired - Sales Immersion:CMS Guidelines	Apr 29, 2009 12:30 PM EDT - Apr 29, 2009 1:13 PM EDT	Online	Completed

[Back](#)

July 2011
Go Today
S M T W T F S
26 27 28 29 30 1 2
3 4 5 6 7 8 9
10 11 12 13 14 15 16
17 18 19 20 21 22 23
24 25 26 27 28 29 30
31 1 2 3 4 5 6

2012 WellCare Certification Process

Questions about WellCare Certification?

Next: Online Enrollment

The bottom of the slide features a decorative graphic consisting of several overlapping, wavy lines in shades of blue and green, creating a sense of movement and flow.



Using the Online Enrollment Portal

release 7-27-2011



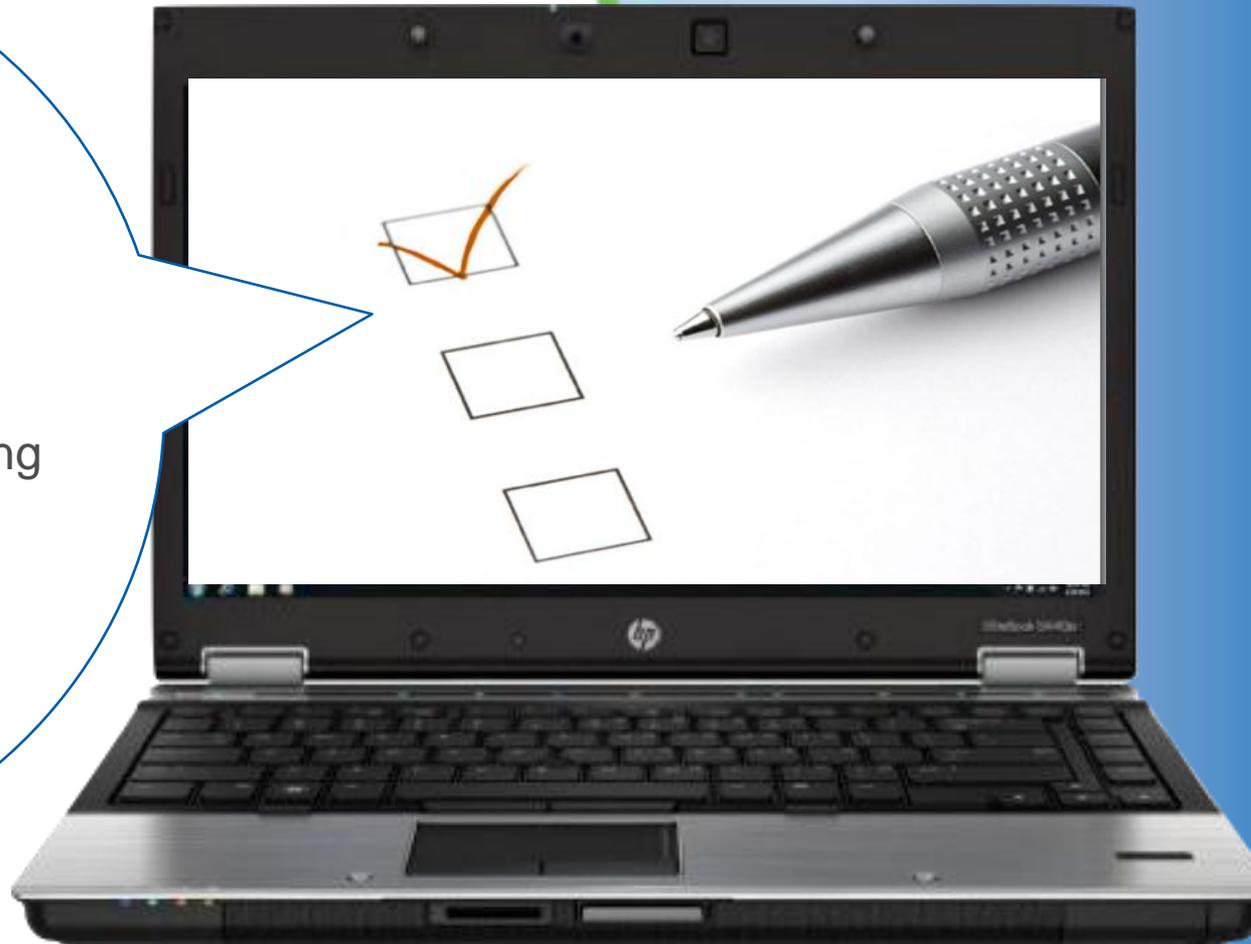
WellCome!

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:

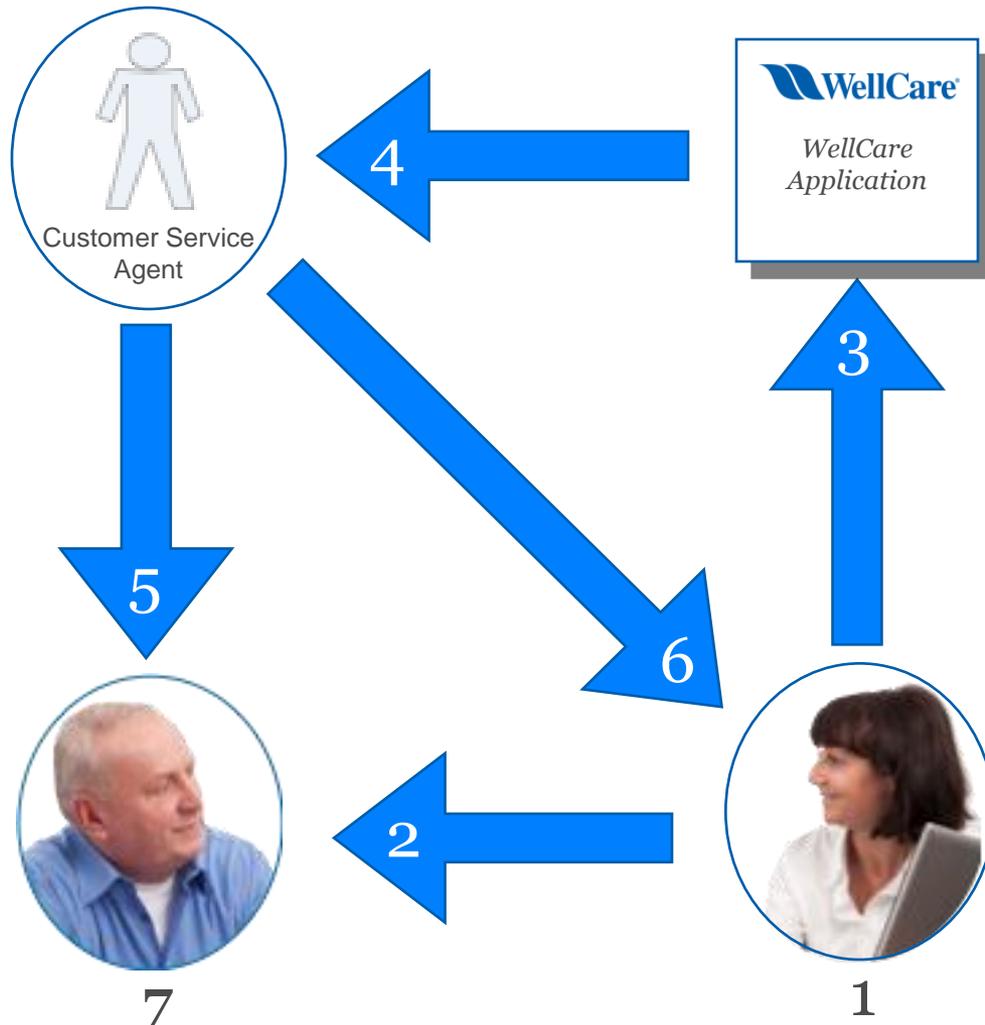
- Prospect is seeing impaired
- Language is not supported by the Enrollment Portal
- Phone / air card service is not available
- Salesforce.com systems or web are down
- IKA systems are down
- Business Consultant or 1099 agent does not have hardware and/or connectivity
- The appointment information lacks 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...

[Click here to begin](#)

How to log-in and enroll

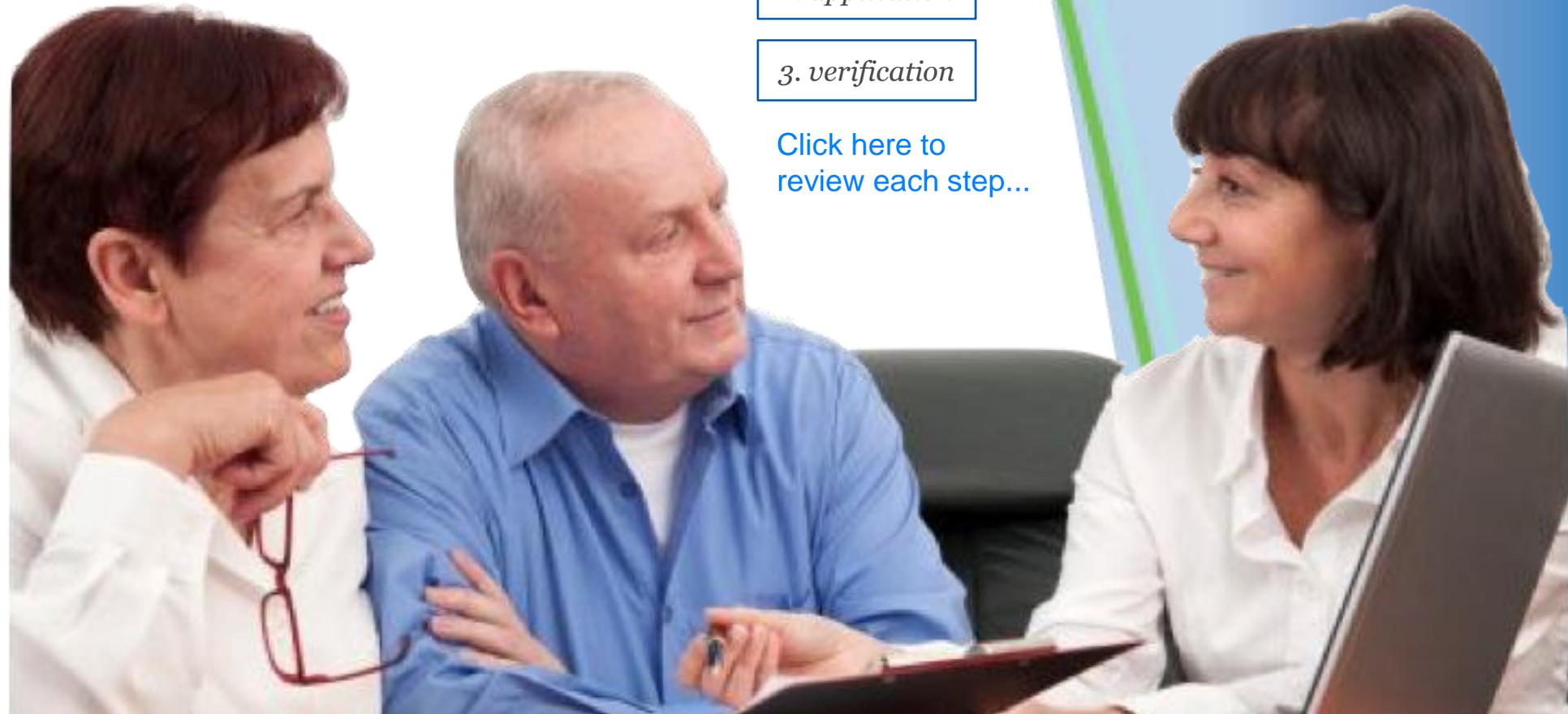
After you have successfully completed WellCare's one-on-one presentation and your client has made a plan selection, you can begin the three steps of the online enrollment process:

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



Need Help?

Contact us by phone, mail, or email.

[Click to Contact Us](#)

- Text Size +

Please provide the appointment ID and your agent ID:

Appointment ID:

Zip Code:

Agent ID:

Street #:

Cancel

Next >>

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

Member Details:

Name:	Mr. John Wayne	Date of Birth:	02/07/1921
Permanent Address:	111 Cowboy Lane TAMPA, FL, 33607	County:	HILLSBOROUGH
Phone No:	(813) 555-1212	Medicaid Verification Date:	
Scope of Appointment:	MA and PDP	Medicaid Level:	

Agent Details:

Agent Name:	Gary Erwin
Agent Writing Number:	101367
Appointment ID:	A137954

Please provide plan selection here:

Preferred Effective Date:	Aug-2011
Plan Name:	WellCare Choice (HMO-POS)
Contract ID:	H1032
Plan ID:	012

Cancel **Next >>**

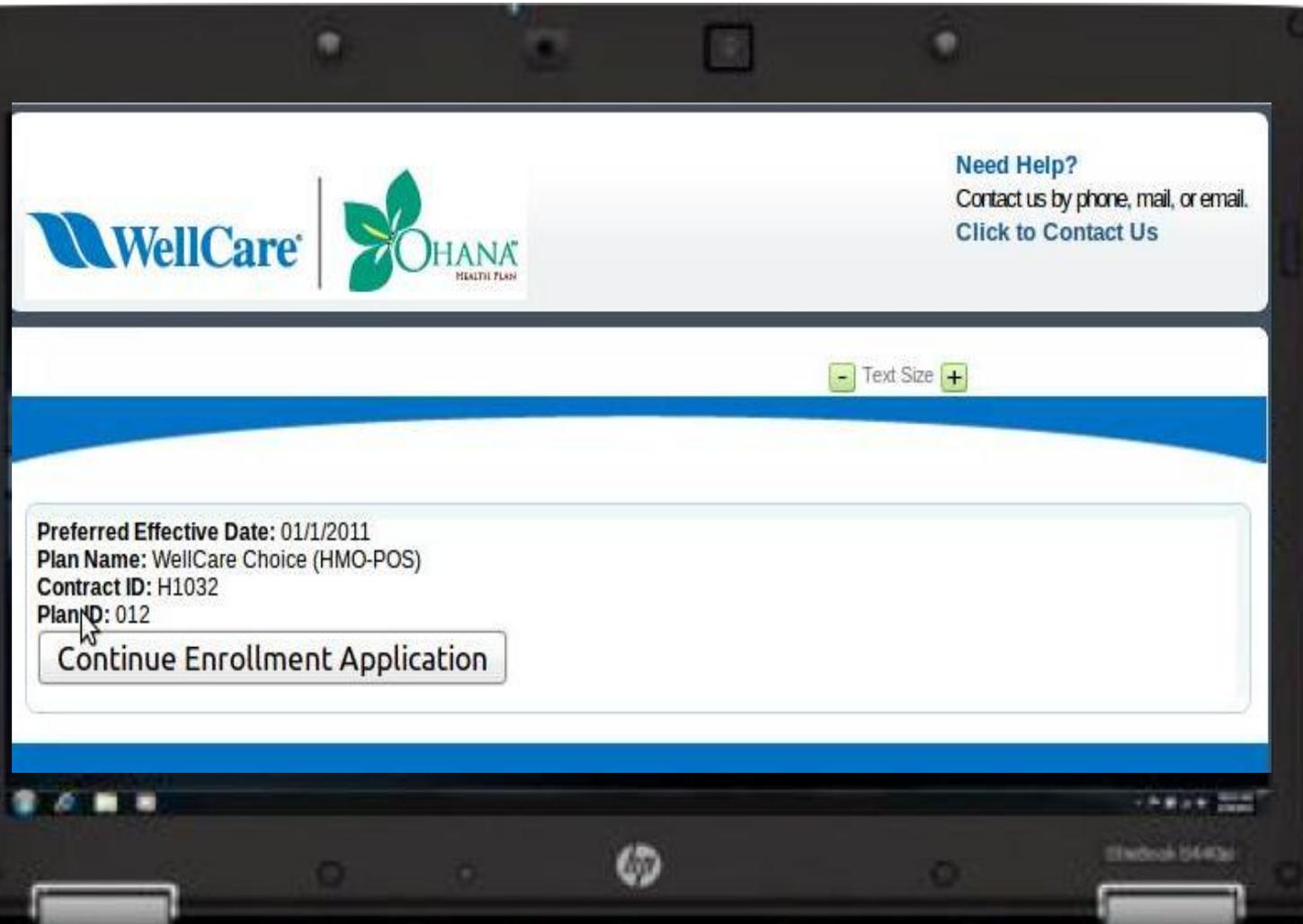
Online Enrollment

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

Step 1 of 6: HOW TO ENROLL:

WellCare Dividend (HMO)

Online Enrollment Questions

■ **Do you need help enrolling online?**

If you need help confirming if you are eligible to enroll or have questions while enrolling online, WellCare Health Plan representatives are available to answer your questions over the phone. Call toll free at 1-866-765-4385 or if hearing impaired, please call TTY/TDD: 1-877-247-6272, Monday - Sunday, 8am to 8pm Eastern

■ **Is it safe and secure?**

We secure this online enrollment form with Digicert Inc. All transactions sent through our website are safe so that only you and WellCare Health Plan will be able to view the data. You may confirm site security by visiting www.digicert.com

■ **Is this enrollment official?**

By completing and submitting this enrollment form you are sending an actual enrollment election to WellCare Health Plan.

To be eligible for WellCare Health Plan plan(s), you must meet the following requirements:

- ✓ You must live in the plan-approved service area.
- ✓ You must be entitled to Medicare Part A (hospital insurance) and enrolled in Medicare Part B (medical insurance), and continue to pay your Medicare Part B premium (and Part A if applicable) to be eligible for a Medicare Advantage Plan.
- ✓ Individuals with End-Stage Renal Disease (ESRD) are not eligible to enroll in WellCare Health Plan. Unless the individual is currently a member with Medicare Advantage Plan or if their previous Medicare Advantage Plan was terminated. An individual who receives a kidney transplant and no longer requires a regular course of dialysis to maintain life is not medically determined to have ESRD.
- ✓ If you are eligible for a Special Needs Plan, you must also receive medical assistance from the state to join this plan.
- ✓ You must be entitled to Medicare Part A or Medicare Part B to be eligible for a Prescription Drug Plan.

Please verify the items below before you begin

- ✓ Have your Medicare card or your letter from the Social Security Administration or Railroad Retirement Board handy. You'll need it to complete your enrollment form.
- ✓ If you have enabled a pop-up blocker on your computer, please disable it.
- ✓ The online enrollment application is supported by Windows/ Internet Explorer 6.0 and 7.0 only.

Enroll now

Back To Plan Selection

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.

Typically, you may enroll in a Medicare Advantage plan during the Annual Enrollment Period between November 15 and December 31 of each year. There are exceptions that may allow you to enroll in a Medicare Advantage plan outside of this period.

Please read the following statements carefully and check the box if the statement applies to you. By checking any of the following boxes you are certifying that, to the best of your knowledge, you are eligible for an Enrollment Period. If we later determine that this information is incorrect, you may be disenrolled.

- I am new to Medicare.
- I recently moved outside of the service area for my current plan or I recently moved and this plan is a new option for me.
I moved on
- I no longer qualify for extra help paying for my Medicare prescription drugs.
I stopped receiving extra help on
- I am moving into, live in, or recently moved out of a long-term care facility (for example, a nursing home).
I moved/will move into/out of the facility on
- I recently left a PACE program on
- I recently involuntarily lost my creditable prescription drug coverage (coverage as good as Medicare's).
I lost my drug coverage on
- I am leaving employer or union coverage on
- I have both Medicare and Medicaid or my state helps pay for my Medicare premiums.
- I get extra help paying for Medicare prescription drug coverage.
- I belong to a pharmacy assistance program provided by my state.
- I recently returned to the United States after living permanently outside of the U.S.
I returned to the U.S. on
- My plan is ending its contract with Medicare, or Medicare is ending its contract with my plan.
- None of these statements apply to me.*

*Please contact WellCare Health Plan at 1-866-765-4385 to see if you are eligible to enroll. We are open Monday - Sunday, 8am to 8pm Eastern. TTY users should call 1-877-247-6272.

Home

Next

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.

Plan name: WellCare Dividend (HMO)

Proposed effective date (MM/DD/YYYY): 05/01/2011

Generally, your effective date will be as early as the 1st of the following month. Your true effective date will be in your acknowledgement of receipt letter which will be mailed within 10 calendar days after application submission

Personal information

Title: First name: Middle initial: Last name:
--Select One--

Sex: Male Female

Birth date (MM/DD/YYYY slashes added automatically):

Home phone number (xxx-xxx-xxxx hyphens added automatically):

E-mail address [optional]:

Permanent residence street address (P.O. Box is not allowed)

Street address 1: Street address 2:

zip code City: County: State:

Enter zip code then select city from list, if applicable. City, county, and state will be completed automatically.

Online Enrollment

Step-by-Step

Step 2

application

Mailing address (only if different from your permanent residence street address)

Mailing address 1:

Mailing address 2:

zip code

City:

County:

State:

Enter zip code then select city from list, if applicable. City, county, and state will be completed automatically.

Emergency contact [optional]

Contact name:

Phone number (000-000-0000):

Relationship to you:

Street address 1:

Street address 2:

ZIP Code:

City:

County:

State:

Please provide your Medicare insurance information

[Sample ID card](#) 

Medicare Claim Number (without hyphens):

Hospital (Part A) effective date (MM/DD/YYYY slashes added automatically):

Medical (Part B) effective date (MM/DD/YYYY slashes added automatically):

Back

Next

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

Step 4 of 6: Please read and answer these important questions.

Paying your plan premium

If enrolling in a health plan with a \$0 monthly premium: If we determine that you owe a late enrollment penalty (or if you currently have a late enrollment penalty), we need to know how you would prefer to pay it.

You can pay by mail each month. You can also choose to pay your premium by automatic deduction from your Social Security benefit check each month.

If enrolling in a plan with a monthly premium: You can pay your monthly plan premium (including any late enrollment penalty that you currently have or may owe) by mail or by having it automatically deducted from your bank account each month. You can also choose to pay your premium by automatic deduction from your Social Security benefit check each month.

People with limited incomes may qualify for extra help to pay for their prescription drug costs. If eligible, Medicare could pay for up to one hundred (100) percent of drug costs including monthly prescription drug premiums, annual deductibles and coinsurance. Additionally, those who qualify will not be subject to the coverage gap or a late enrollment penalty. Many people are eligible for these savings and don't even know it. For more information about this extra help, contact your local Social Security office, or call 1-800-MEDICARE (1-800-633-4227), 24 hours per day, 7 days per week. TTY users should call 1-877-486-2048.

If you qualify for extra help with your Medicare prescription drug coverage costs, Medicare will pay all or part of your plan premium. If Medicare pays only a part of this premium, we will bill you for the amount that Medicare doesn't cover.

If you don't select a payment option, you will get a bill each month.

Please select a premium payment option

Get a bill

Note: Once you are enrolled, we will include an electronic funds transfer (EFT) form in your new member packet. If you would like to have your monthly plan premiums deducted from your bank account instead of receiving a bill each month, please follow the instructions and complete and return the form. You may also access the form on our Web site at www.wellcare.com or call our Customer Service department at 1-866-765-4385 (TTY users call 1-877-247-6272), Monday - Sunday, 8am to 8pm Eastern to request an EFT form. Once we receive your paperwork, the process can take up to two months to take effect. You should keep paying your monthly bill until the EFT withdrawals have started.

Automatic deduction from your monthly Social Security benefit check. (The Social Security deduction may take two or more months to begin. In most cases, the first deduction from your Social Security benefit check will include all premiums due from your enrollment effective date up to the point withholding begins.)

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

Please read and answer these important questions

1. Do you have End-Stage Renal Disease (ESRD)?

Yes No

2. For MAPD Plans: Some individuals may have other drug coverage, including other private insurance, TRICARE, Federal employee health benefits coverage, VA benefits, or State Pharmaceutical Assistance Programs. **Will you have other prescription drug coverage in addition to WellCare?**

Yes No

3. Are you a resident in a long-term care facility, such as a nursing home?

Yes No

4. Are you enrolled in your State Medicaid program?

Yes No

5. Do you or your spouse work?

Yes No

6. Medicare Savings Programs allow your state to help you pay for your Medicare Part A and/or Part B premiums. Are you enrolled in a Medicare Savings Program?

Yes No

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.

If you would like to select a PCP, please enter the PCP number and answer whether you are an existing patient. If you need to search for a PCP, please click the 'Find a PCP' button. When complete, click the Validate button to determine if this physician can currently accept you as a patient. If you would like your PCP to be selected for you, please select the checkbox below.

Find a PCP

PCP Information

Provider ID #

Are you an existing patient of this PCP?

Yes No

Validate

I do not wish to select a PCP, I would like WellCare to select my PCP for me. I understand that I may change my PCP at any time by calling the customer Service number on my WellCare subscriber ID card.

If a valid PCP is not selected or the checkbox for PCP automatic assignment is not checked, a PCP will be assigned to the beneficiary. The PCP assignment may be changed at any time by calling the customer service number on the subscriber ID card.

Please select from these options if you would prefer for us to send information in a particular language or format.

Not all languages are available for all areas.

Select a language:

Alternate format (if required):

Please contact WellCare Health Plan at 1-866-765-4385 regarding the availability of information in a format or language other than what is listed above. TTY users should call 1-877-247-6272. Our office hours are Monday - Sunday, 8am to 8pm Eastern.

Back

Next

Online Enrollment

Step-by-Step

Step 2

application

Step 5 of 6: Please read this important information.

For MAPD Plans: If you currently have health coverage from an employer or union, joining WellCare could affect your employer or union health benefits. You could lose your employer or union health coverage if you join WellCare. Read the communications your employer or union sends you. If you have questions, visit their Web site, or contact the office listed in their communications. If there isn't any information on whom to contact, your benefits administrator or the office that answers questions about your coverage can help.

Please read and sign below

By completing this enrollment application, I agree to the following:

WellCare is a Medicare Advantage plan and has a contract with the federal government. I will need to keep my Medicare Parts A and B. I can be in only one Medicare Advantage plan at a time and I understand that my enrollment in this plan will automatically end my enrollment in another Medicare health plan or prescription drug plan. It is my responsibility to inform you of any prescription drug coverage that I have or may get in the future. **(MA only plans:** I understand that if I don't have Medicare prescription drug coverage, or creditable prescription drug coverage (as good as Medicare's), I may have to pay a late enrollment penalty if I enroll in Medicare prescription drug coverage in the future.) Enrollment in this plan is generally for the entire year. Once I enroll, I may leave this plan or make changes only at certain times of the year when an enrollment period is available (Example: November 15–December 31 of every year), or under certain special circumstances.

WellCare serves a specific service area. **If I move out of the area that WellCare serves, I need to notify the plan so I can disenroll and find a new plan in my new area.** Once I am a member of WellCare, I have the right to appeal plan decisions about payment or services if I disagree. I will read the Evidence of Coverage document from WellCare when I receive it to know which rules I must follow to get coverage with this Medicare Advantage plan. I understand that people with Medicare aren't usually covered under Medicare while out of the country except for limited coverage near the U.S. border.

I understand that beginning on the date WellCare coverage begins, I must get all of my health care from WellCare, except for emergency or urgently needed services or out-of-area dialysis services. Services authorized by WellCare and other services contained in my WellCare Evidence of Coverage document (also known as a member contract or subscriber agreement) will be covered. Without authorization, **NEITHER MEDICARE NOR WellCare WILL PAY FOR THE SERVICES.**

I understand that if I am getting assistance from a sales agent, broker or other individual employed by or contracted with WellCare, he/she may be paid based on my enrollment in WellCare.

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.

Counseling services may be available in my state to provide advice concerning Medicare supplement insurance or other Medicare Advantage or Prescription Drug plan options as well as medical assistance through the state Medicaid program and the Medicare Savings Program.

Release of Information:

By joining this Medicare health plan, I acknowledge that WellCare will release my information to Medicare and other plans as is necessary for treatment, payment and health care operations. I also acknowledge that WellCare will release my information (including my prescription drug event data) to Medicare, who may release it for research and other purposes which follow all applicable federal statutes and regulations. The information on this enrollment form is correct to the best of my knowledge. I understand that if I intentionally provide false information on this form, I will be disenrolled from the plan.

I understand that my signature (or the signature of the person authorized to act on my behalf under the laws of the state where I live) on this application means that I have read and understand the contents of this application. If signed by an authorized individual (as described above), this signature certifies that: 1) this person is authorized under state law to complete this enrollment and 2) documentation of this authority is available upon request by WellCare or by Medicare.

Are you being assisted with this online enrollment by your authorized/legal representative or are you making this enrollment decision yourself?

Authorized/legal representative (Example: Power of Attorney)

Self

Electronic signature (self or authorized representative only):

I, the enrollee, agree to be a member of WellCare Health Plan.

Back

Review

Online Enrollment

Step-by-Step

Step 2

application

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

Medicare insurance information

Medicare Claim Number: 123456789A
Hospital (Part A) - Effective date: 05/01/2011
Medical (Part B) - Effective date: 05/01/2011

Edit personal information

Paying your plan premium

If enrolling in a health plan with a \$0 monthly premium: If we determine that you owe a late enrollment penalty (or if you currently have a late enrollment penalty), we need to know how you would prefer to pay it. You can pay by mail each month. You can also choose to pay your premium by automatic deduction from your Social Security benefit check each month.

If enrolling in a plan with a monthly premium: You can pay your monthly plan premium (including any late enrollment penalty that you currently have or may owe) by mail or by having it automatically deducted from your bank account each month. You can also choose to pay your premium by automatic deduction from your Social Security benefit check each month. People with limited incomes may qualify for extra help to pay for their prescription drug costs. If eligible, Medicare could pay for up to one hundred (100) percent of drug costs including monthly prescription drug premiums, annual deductibles and coinsurance. Additionally, those who qualify will not be subject to the coverage gap or a late enrollment penalty. Many people are eligible for these savings and don't even know it. For more information about this extra help, contact your local Social Security office, or call 1-800-MEDICARE (1-800-633-4227), 24 hours per day, 7 days per week. TTY users should call 1-877-486-2046.

If you qualify for extra help with your Medicare prescription drug coverage costs, Medicare will pay all or part of your plan premium. If Medicare pays only a part of this premium, we will bill you for the amount that Medicare doesn't cover.

If you don't select a payment option, you will get a bill each month.

Selected premium payment option

Get a bill

Note: Once you are enrolled, WellCare Health Plan will include an electronic funds transfer (EFT) form in your new member packet. If you would like to have your monthly plan premiums deducted from your bank account instead of receiving a bill each month, please follow the instructions and complete and return the form to WellCare Health Plan. You may also access the form on our Web site at [Web site] or call our Customer Service department at 1-866-765-4395 (TTY users call 1-877-247-6272), Monday - Sunday, 8am to 8pm Eastern to request an EFT form. Once we receive your paperwork, the process can take up to two months to take effect. You should keep paying your monthly bill until the EFT withdrawals have started.

Automatic deduction from your monthly Social Security benefit check. (The Social Security deduction may take two or more months to begin. In most cases, the first deduction from your Social Security benefit check will include all premiums due from your enrollment effective date up to the point withholding begins.)

Other important questions

1. Do you have End-Stage Renal Disease (ESRD)?

Yes No

2. Will you have other prescription drug coverage in addition to WellCare?

Yes No

3. Are you a resident in a long-term care facility, such as a nursing home?

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.

The screenshot shows a laptop screen displaying an online enrollment application form. The form is divided into several sections:

- 4. Are you enrolled in your State Medicaid program?** with radio buttons for Yes and No.
- 5. Do you or your spouse work?** with radio buttons for Yes and No.
- 6. Medicare Savings Programs allow your state to help you pay for your Medicare Part A and/or Part B premiums. Are you enrolled in a Medicare Savings Program?** with radio buttons for Yes and No.
- Please type PCP ID and answer if you are current patient? And click Validate icon** with a text input field for PCP ID and radio buttons for Current Patient? Yes and No.
- Language and format:** with dropdown menus for Select a language (English) and Select a format (--Select One--).
- Edit important questions** button.
- Are you being assisted with this online enrollment by your authorized/legal representative or are you making this enrollment decision yourself?** with radio buttons for Authorized/legal representative (Example: Power of Attorney) and Self.
- Electronic signature (self or authorized representative only):** with a checkbox for I, the enrollee, agree to be a member of WellCare Health Plan.
- Edit electronic signature** button.
- I AGREE** button (highlighted with a red box).
- Restart application** button.

Online Enrollment

Step-by-Step

Step 2

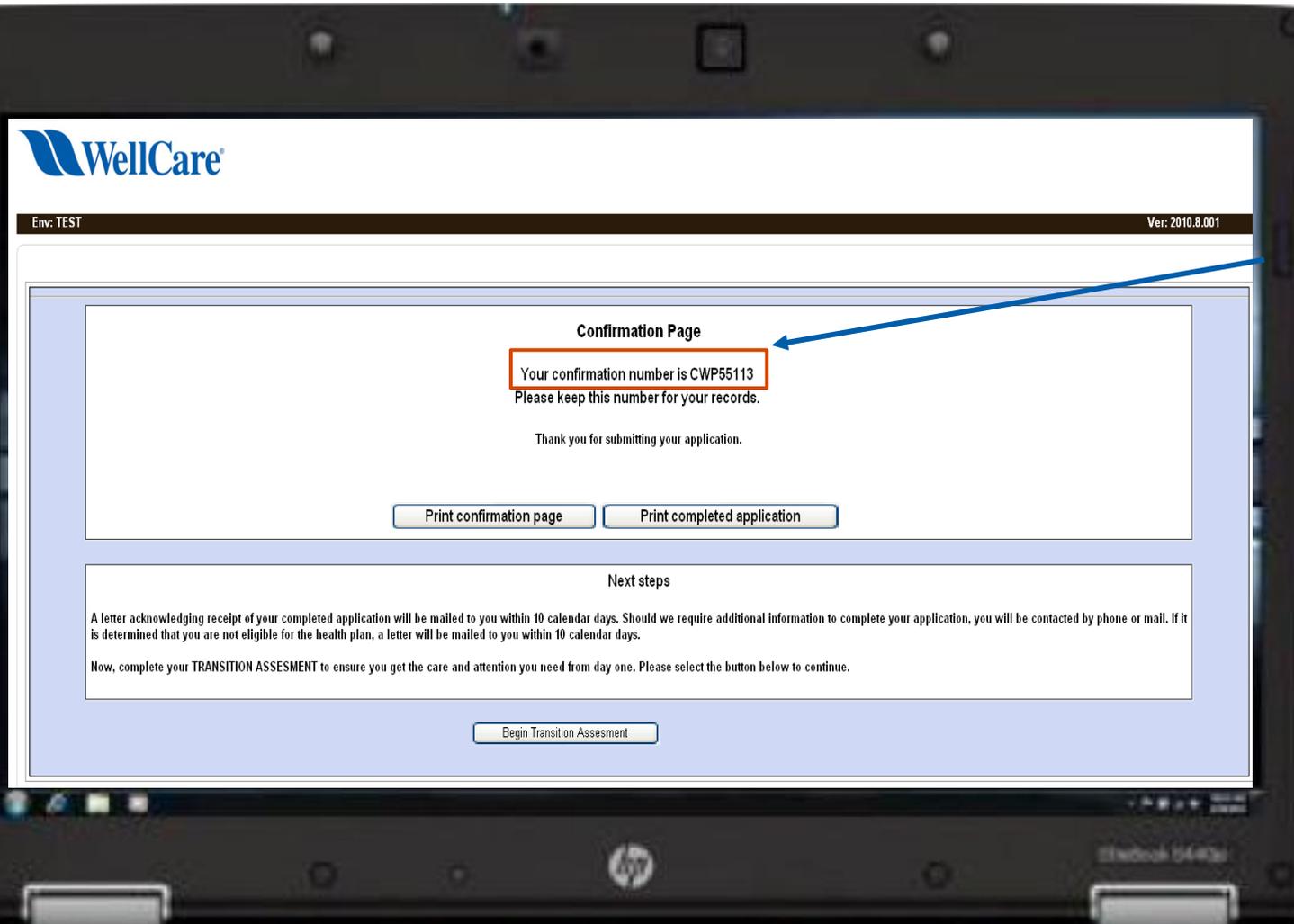
application

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)

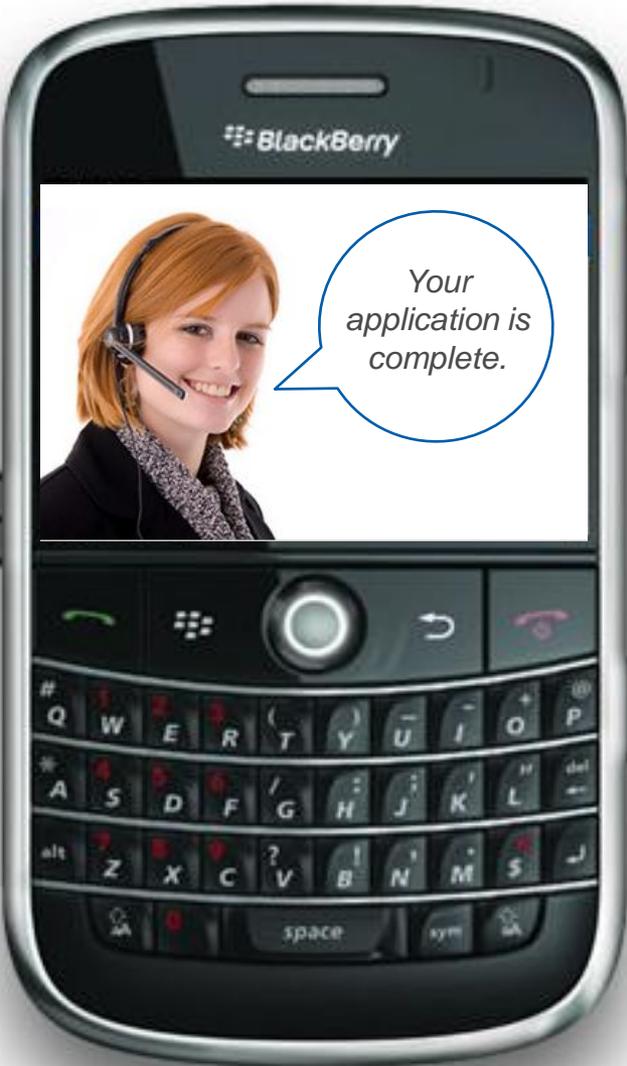
Step 1: Appointment Verification and Address Validation

- 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)

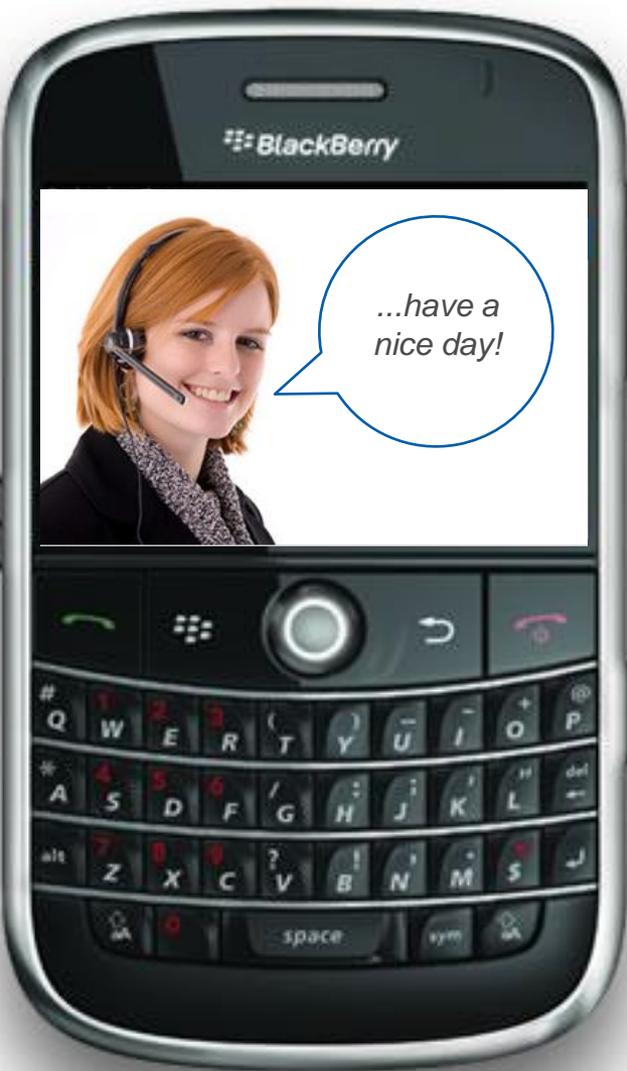
Step 3: Enrollee verification

- 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”



2012 WellCare Certification Process

Questions about
Online Enrollment?

Thank You!

