

# Contracting Step-by-Step Guide

## Step-by-Step Contracting Instructions

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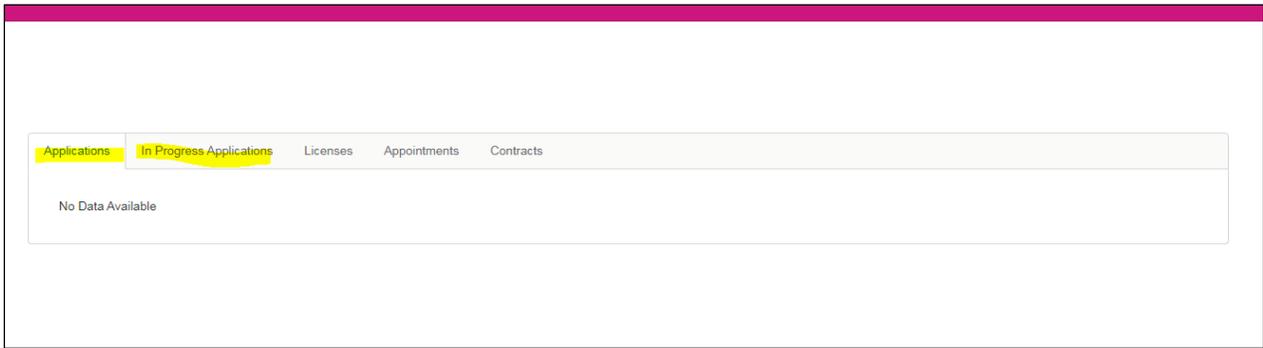
### New Brokers

The login used for contracting will be the exact same logins you will use when logging into your Broker Portal once contracted and appointed.

### Existing Brokers

Current logins being used for Broker Portal access will be the same logins used for contracting.

- Log into the Broker Portal
- Click on the drop down arrow next to the agent's name, select **My Profile**
- Click on the **In Progress Applications** tab to start the contract/application



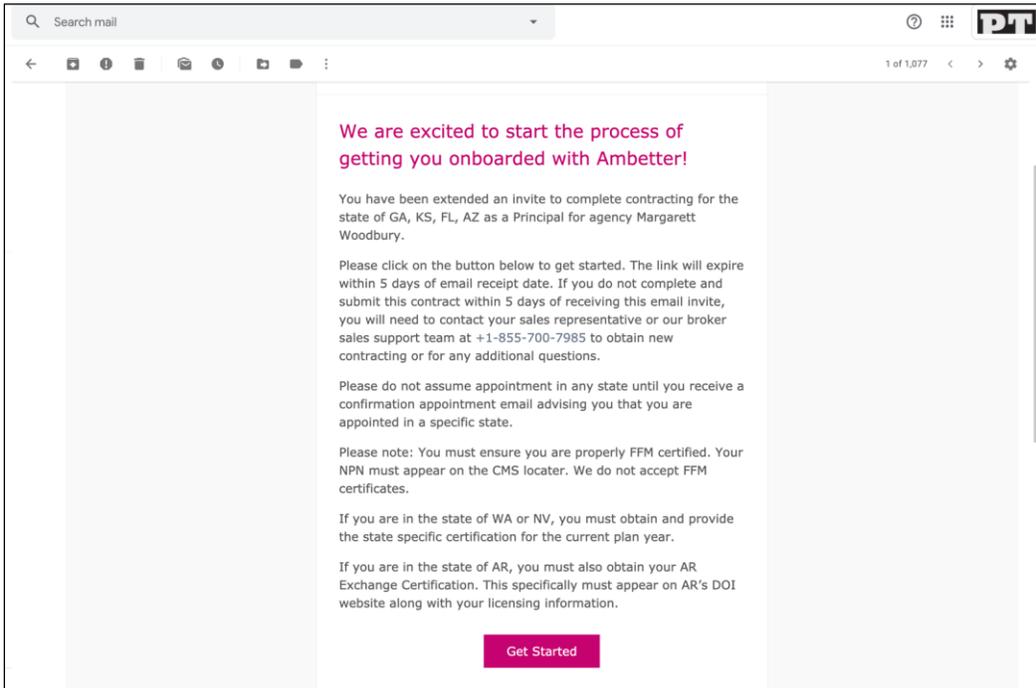
### Tips

- Ensure that you enter the correct SSN/TIN that is tied to your NPN on the contract.
- You can stop and resume contract later. The same username and password initially created is what you will use to do so.
- Upon logging in to resume a contract, you will be directed to the **Onboarding Contract Portal** only. At this point, full portal access is not granted.

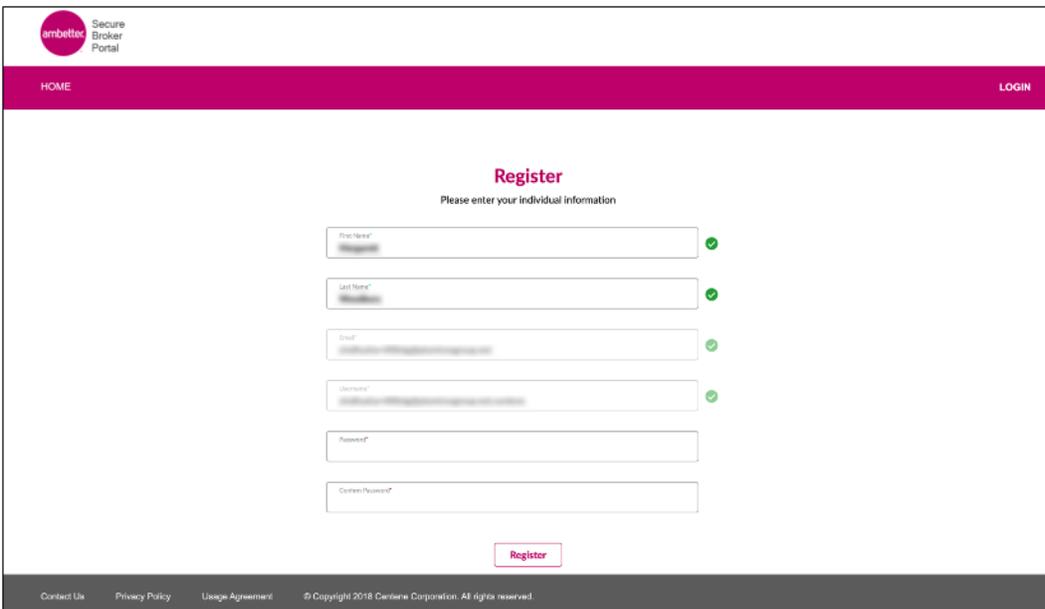
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## Getting Started with the Contract

- You will receive an email with the link to start the onboarding process.
- Click on **Get Started** button in the email.



- If you are a new Broker to Ambetter, you will be directed to the **Registration Page** to create a password and obtain your username
- If you are an existing Ambetter Broker adding additional contracts, you will be directed to **Login Page**.



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- Once you register or login, you will be redirected to the application.

Agency: Margaret Woodbury Principal: Margaret Woodbury

## Welcome to Ambetter

Thank you for choosing us. We're excited to help you get contracted and onboarded.

### Personal Information

- Confirm
- Address & Contact
- Errors & Corrections
- License Certification
- Criminal History
- Bankruptcy
- W9 form
- Sign Contract
- Submit

## Tell us about yourself

Please enter your individual information, let's personalize your experience.

First Name

Middle Name

Last Name \*

DOB

NPN \*

SSN \*

Are you a resident of Florida State?\*

Yes  No

Are you contracting through an Agency?\*

I agree to consent for background check and FCRA check

Please accept to continue

Your Progress

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- You must enter DOB in this format MM-DD-YYYY, NPN and SSN.
- If the state of Florida is selected for contracting, you must answer if you are a resident of Florida.
- If the Broker is a Producer, they must answer if they are contracting through an Agency. If yes, the Broker has to enter the ETIN for the Agency.

Are you contracting through an Agency?\*

If you answered yes to the above, you authorize that you are the principle or officer in charge of the agency specified below. Commission will be paid directly to the agency specified below.

Agency Name \*

ETIN \*



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- After you enter all the details and click on **Next**, the call to NIPR will be made to bring in all the Licenses, Appointments, Certifications and Addresses.
- All your licenses will be displayed and there will be a green tick next to the states that you were invited for and have a license for in that state.

### Producer License

	Name	LicenseType	Jurisdiction	Status	Issue Date	Expiration Date
✓	XXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXX	Producer License	CA	Active	2018-01-01	2020-12-31
✓	XXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXX	Producer License	CA	Active	2018-01-01	2020-12-31
	XXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXX	Producer License	CA	Active	2018-01-01	2020-12-31
	XXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXX	Producer License	CA	Active	2018-01-01	2020-12-31
	XXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXX	Producer License	CA	Active	2018-01-01	2020-12-31
	XXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXX	Producer License	CA	Active	2018-01-01	2020-12-31
	XXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXX	Producer License	CA	Active	2018-01-01	2020-12-31
	XXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXX	Producer License	CA	Active	2018-01-01	2020-12-31
	XXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXX	Producer License	CA	Active	2018-01-01	2020-12-31

< 1 2 3 ... 9 >

Please note that NIPR returns all licenses that you currently hold or that you've ever held. The green check mark (s) indicate states in which you have been offered contracting through Ambetter!

- After NIPR returns the states, you can click on **Continue**.
- The Contact Residence and Business Address will be returned. You can validate the address, make changes if needed and click on **Next**.

### Welcome to Ambetter

Thank you for choosing us. We're excited to help you get contracted and onboarded.

- ✓ Personal Information
- ✓ Confirm
- Address & Contact
- Errors & Corrections
- License Confirmation
- Criminal History
- Bankruptcy
- W9 form
- Sign Contract
- Submit

### Address & Contact Information

Contact Residence Address

Street Address \* Suite

City \* State \* Zip Code \*

Contact Business Address

Street Address \* Suite

City \* State \* Zip Code \*

Agency Business Address

Street Address \* Suite

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- Every Broker must have E&O Insurance of at least \$1,000,000.
- If you do not have E&O Insurance, the application will be rejected.
- After entering the E&O details, click on **Continue**.

The screenshot shows the 'Errors & Omissions' section of the Ambetter Secure Broker Portal. The user is Margaret Woodbury. The form asks: 'Do you currently have Errors & Omissions Insurance in force?'. There are 'Yes' and 'No' radio buttons. Below this, there are two input fields: 'Name of Insurance Carrier' with the value 'Test' and '\$ Current Limits' with the value '1,000,000.00'. A 'Continue' button is at the bottom right. A sidebar on the left lists navigation options: Personal Information, Confirm, Address & Contact, Errors & Omissions (highlighted), License Confirmation, Criminal History, Bankruptcy, W9 form, Sign Contract, and Submit. The footer contains links for Contact Us, Privacy Policy, Usage Agreement, and a copyright notice for Centene Corporation.

You must answer the License confirmation Questionnaire and enter your FFM user ID then click on Continue.

- FFM User ID will be your username used on the portal.cms.gov website. If you are only contracting in WA, NV or PA and do not have an FFM User ID, you may enter your license number.

The screenshot shows the 'License Confirmation' section of the Ambetter Secure Broker Portal. The user is Margaret Woodbury. The form asks: 'I am currently licensed as a Health producer in my resident area, and in all the states in which I am being offered a contract and appointment, is?'. There are 'Yes' and 'No' radio buttons. Below this, it asks: 'Has any insurance license held by you been refused, suspended, revoked or been the subject of any administrative action by this or any other state?'. There are 'Yes' and 'No' radio buttons. A text block explains: 'If you are in the soliciting through the Federally Facilitated Marketplace, please provide your FFM ID. If you are submitting this contract for the states of WA and / or NV only, please enter your insurance license number. If you are soliciting through the Federally Facilitated Marketplace AND the states WA or NV, you must enter your FFM ID'. There is an input field for 'Enter your FFM ID' with a redacted value. A 'Continue' button is at the bottom right. The sidebar and footer are identical to the previous screenshot.



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- You must answer the Criminal History Questionnaire and click on **Continue**.

The screenshot shows the 'Criminal History' questionnaire. The left sidebar lists navigation options: Personal Information, Confirm, Address & Contact, Errors & Omissions, License Confirmation, Criminal History (highlighted), Bankruptcy, W9 form, Sign Contract, and Submit. The main content area contains four questions with 'Yes' and 'No' radio buttons:

- Have you ever been charged, convicted or had a judgment issued against you in any administrative, criminal or civil action in any jurisdiction, the subject of which involved a violation of law, fraud, misappropriation, conversion, misrepresentation or insurance? (No selected)
- Has any regulatory agency ever taken disciplinary action (e.g., debarment, suspension, exclusion, disqualification, etc.) against you, or is any such action pending, the subject of which involves a violation of law, fraud, misappropriation, conversion, misrepresentation or insurance? (No selected)
- Are any charges now pending against you? (No selected)
- Excluding traffic violations or "youthful offender" adjudications, have you ever been convicted of a crime? (No selected)

Buttons for 'Back' and 'Continue' are visible at the bottom right of the form area.

- If you answer Yes to any of the questions you can continue with the flow, but the application will be set to manual review.

The screenshot shows the 'Bankruptcy' questionnaire. The left sidebar lists navigation options: Personal Information, Confirm, Address & Contact, Errors & Omissions, License Confirmation, Criminal History, Bankruptcy (highlighted), W9 form, Sign Contract, and Submit. The main content area contains one question with 'Yes' and 'No' radio buttons:

- Are you currently in bankruptcy? (No selected)

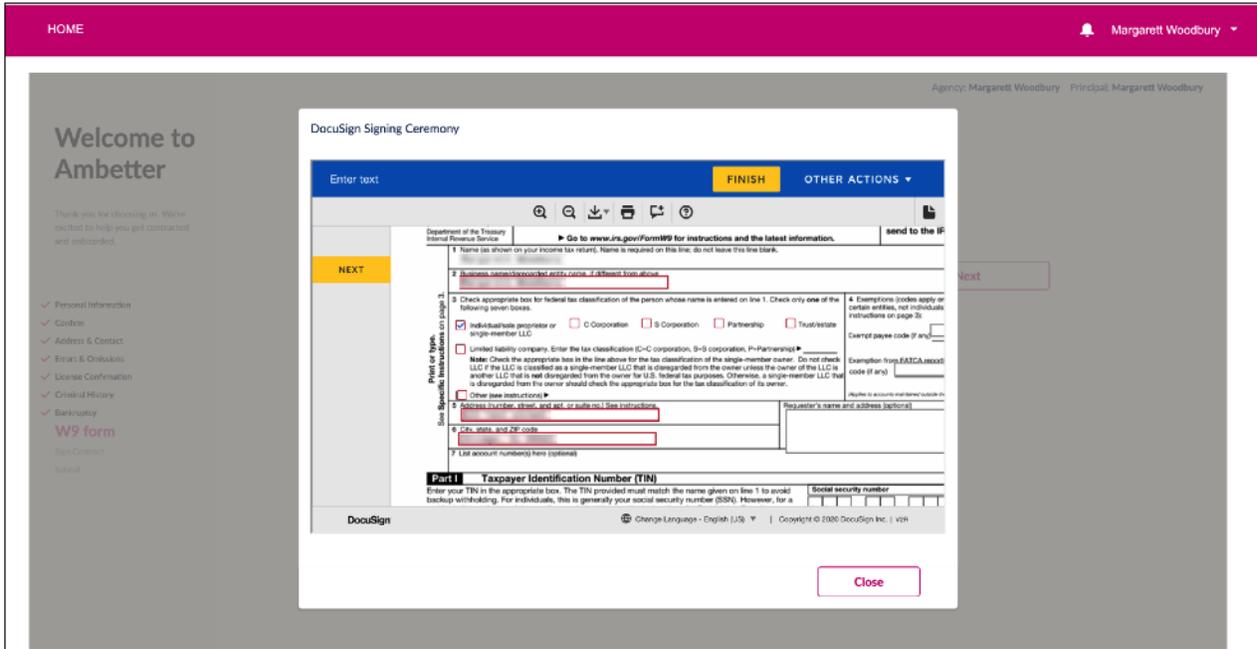
Below the question are two checkboxes, both of which are checked:

- I understand that willful misrepresentation of any fact required to be disclosed through this application is a violation of the insurance code and may result in the denial of my application and/or the revocation of my insurance license(s).
- I understand that I represent the interest of the Applicant for participation, not Centene Health Plans and have advised my client not to terminate any existing coverage until receiving notice of coverage and that I have no right to bind coverage, to alter terms of the Insurance Contract or Application in any manner, or to adjust.

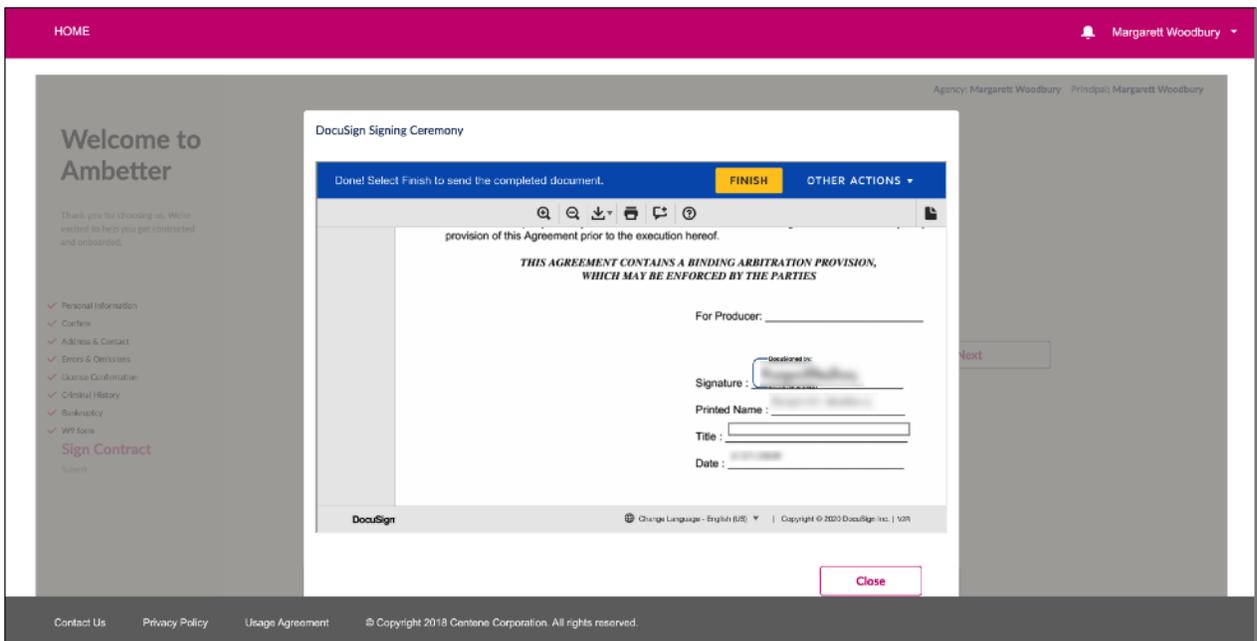
Buttons for 'Back' and 'Continue' are visible at the bottom right of the form area.

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- If you select Yes for Bankruptcy, the application will be rejected.
- If you as the Broker are a Producer, the W9 form has to be completed. The Broker has to fill in the missing details and sign the W9 form.



- After the W9 the contract is generated for the Broker to sign.



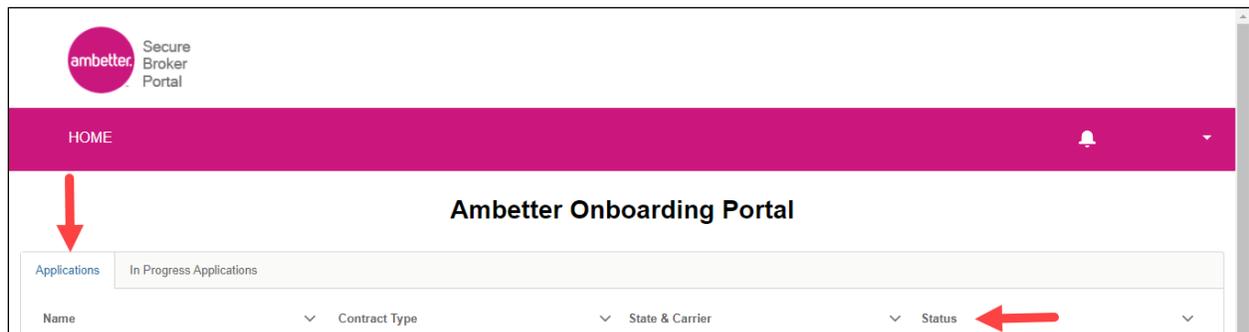
- After the Broker signs the contract and clicks on **Next**, the Application is successfully submitted.

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## Checking Status of Contract

### New Brokers

- Log into the Onboarding/Broker Portal
- On the Home page in the Applications tab is where you can see the status of your contract.



### Existing Brokers

- Log into the Broker Portal
- Click on your name on the top right then select **My Profile**
- Scroll to the bottom and in the **Applications tab** is where you can see the status of your contract.

## Statuses

**New:** Contract has not been started yet

**In Progress:** Contract/Application has been started but not completed/signed yet

**Manual Review:** Need to be reviewed by our Agency team and/or needs further information from Agent

**Signed:** Contract has been completed and submitted

**Submitted:** Contracted has been received and is in Background Check or in final review

**Countersigned:** Contracting/appointment process has been completed & approved

**Rejected:** Contract was declined or Agent did not complete contract within 10 days

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## FAQs

**Q: My In Progress Application tab on my home page is blank and there's no link to click. Where can I complete or open my contract?**

**A:** Click on your name in the top right > My Profile > Scroll down and click on In Progress Applications tab to open the new contract link.

**Q: Why does my W9 have my individual name and tax ID instead of my agency?**

**A:** The agent did not select "Yes" in the first page of the contract. The contract will not allow you to go back to the 1<sup>st</sup> page so you would need to contact Broker Sales Support to send out a new contract link.

**Q: I am getting an error message indicating my NPN cannot be verified with NIPR.**

**A:** Please copy and paste your name from the state DOI site and make sure to enter your birthdate with hyphens (MM-DD-YYYY) instead of backslashes and enter your social in digits only.

**Q: The contract invitation has expired before I got to it, can you resend me a new link?**

**A:** Please request a new contract invitation through your up-line agency and/or speak to your Ambetter Sales Representative for a new contract invitation.

**Q: How can I add another state in my contract?**

**A:** You will need to contact your Ambetter Sales Representative to get approval on adding any other states. If you are a Sub Producer you will need to contact your Agency.

**Q: How long does it take for the background check?**

**A:** Contracting can take up to 7-15 business days with state appointments and backgrounds.

**Q: How long do I have to fill out the contracting on boarding?**

**A:** You have 10 business days to fill out our contract before the link expires and you will need a new one.

**Q: How will I know when my contract has been completed?**

**A:** You will receive a welcome email from contracting stating you're ready to sell.

**Q: How will I know if I am being contracted with the right agency or up line?**

**A:** When the invitation for contracting is sent it is important to make sure the contracting agency name is correct in the welcome letter (1<sup>st</sup> page) to get started to being contracted.