

Broker Contracting Guide

2024



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Welcome!

Welcome to Broker Contracting User Guide!

This guide is designed to help you navigate through the steps needed to use our Online Self Service Tool effortlessly. Whether you're a newcomer or an existing user, you'll find valuable information here to enhance your knowledge of the process to become a contracted broker with Health Net.

Purpose of this Guide

This user guide is crafted with the aim to provide you with clear, step-by-step instructions on how to first register as a user for our Online Self Service Tool. Then it will serve as your go-to resource to access of our Online Self Service Tool, ensuring that you can leverage all its capabilities to their fullest extent!

Registration

For New Users

If you are accessing the **Health Net Broker Online Self Service Tool** for the **first time**, please proceed with the following instructions to register.

Use this link to get to the registration page -

[https://social.webcomserver.com/wpm/caseEditPrepare.do?
&token=mvnD00WnOfz5wG96DbDmft5h30%2BbGeElN2i2d3cxSrw%3D&tenantName=hlth](https://social.webcomserver.com/wpm/caseEditPrepare.do?&token=mvnD00WnOfz5wG96DbDmft5h30%2BbGeElN2i2d3cxSrw%3D&tenantName=hlth)

Note! You can also access the registration page through our websites using either of the following:

Group Business

- Visit the Health Net website at https://www.healthnet.com/content/healthnet/en_us.html
- Click on the **Brokers** Tab on the top right of the screen.
- Click on **Get Contracted** under the **Plan Information** Section.
- Click on **Commercial Contracts** in the **Commercial Brokers** box.
- Click on **Create a Health Net Contract Account** in the middle of the page.

Individuals & Family Plans

- Visit the ambetter website at <https://ifp.healthnetcalifornia.com/>
- Hover your mouse over **FOR BROKERS** and click on **Get Contracted**.
- Click on **Broker Self-Service Web Tool** on the second bullet under Get Contracted with Health Net.

Note! The same registration form is used for either of the options above.

Existing Users

If you are already registered with the **Health Net Broker Online Self Service Tool**, and have a login and password, please proceed directly to the login page -

<https://social.webcomserver.com/wpm/?tenantName=hlth>

Registration

Registration Form

- On the Health Net Sign U-Up Page, complete the form.
- Once finished, click submit.
- You will receive an email confirmation to the email you provided on the form with details on how to continue the registration process.

An email has been sent with a login link, your user name and your password.
The first time you log in, you will be required to change your password.
There is nothing more you need to do here. Please close this browser window

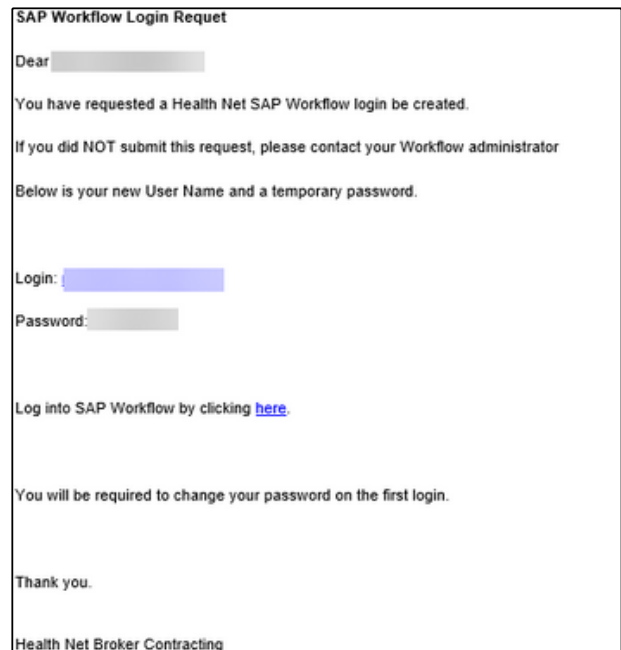
- Note, if you see, “NPN currently in use” click the green “Password Reset” button and your login credentials will be emailed to you



The screenshot shows the 'My Profile' section of the Health Net Sign-Up Page. It includes three main sections: 1. Your Login Data (Login Name), 2. Your Personal Information (First Name, Middle Name, Last Name, Email, Telephone, NPN), and 3. Security Check (Security Check, Try New Code). A 'Submit' button is at the bottom right. A watermark 'pd34m' is visible over the Security Check section.

Registration Completion

- Check your email for login details on how to proceed.
- The email will include a temporary password to login.
- Upon login, you will be prompted to change your password.



The screenshot shows an email titled 'SAP Workflow Login Request'. It addresses the user as 'Dear [redacted]' and informs them that a Health Net SAP Workflow login has been requested. It provides instructions on what to do if they did not submit the request (contact the Workflow administrator) and provides their new User Name and a temporary password. It includes fields for 'Login:' and 'Password:'. It also provides a link to log into SAP Workflow and states that the user will be required to change their password on the first login. The email ends with 'Thank you.' and 'Health Net Broker Contracting'.

Note! If you do not receive a confirmation email with your login credentials, please contact your sales representative at 1 800 909 3447 , Option 3 or email brokers@healthnet.com

Registration

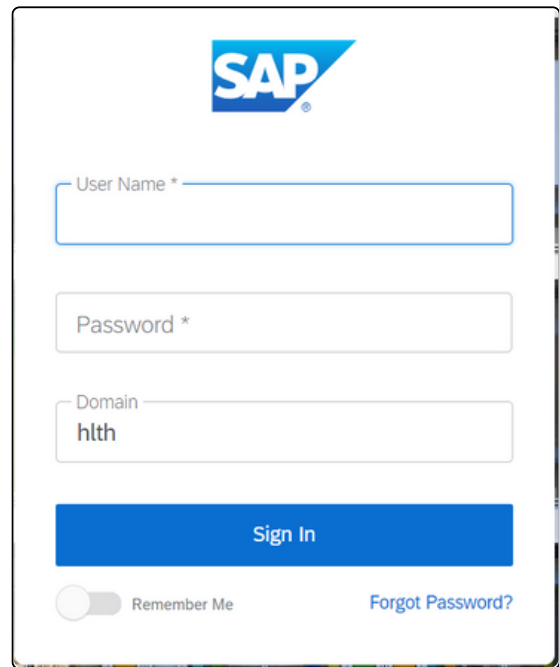
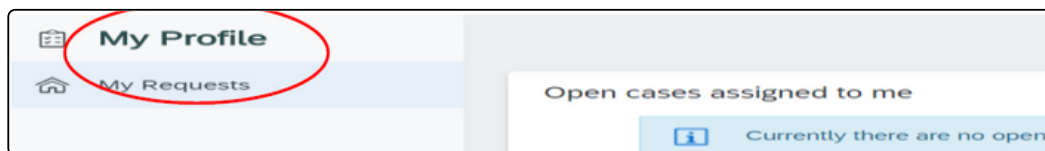
Log In

You will now be able to log into the Online Self Service Tool by accessing the following link:

<https://social.webcomserver.com/wpm/?tenantName=hlth>

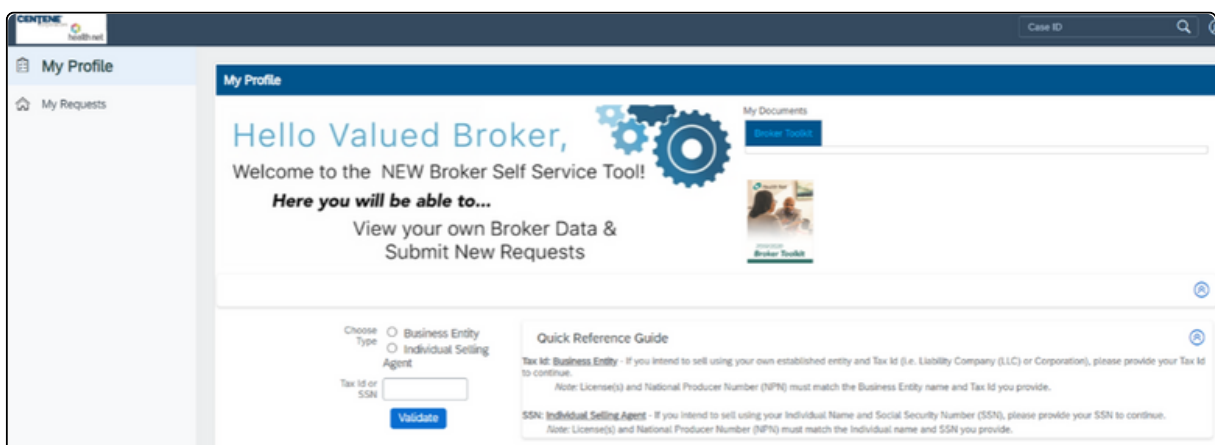
To Login:

- Enter your login credentials.
- Domain name is **hlth**.
- Click **Sign In**.
- Select **My Profile** on the top left to move on to the validation step.

A screenshot of the SAP login interface. At the top is the SAP logo. Below it are three input fields: 'User Name *', 'Password *', and 'Domain'. The 'Domain' field contains the text 'hlth'. Below the input fields is a large blue button labeled 'Sign In'. At the bottom, there is a 'Remember Me' checkbox and a link for 'Forgot Password?'.

Validation

Upon your first successful login, you will be prompted to complete a validation step. This step can be completed using either a **Tax ID** or **Social Security Number**.

A screenshot of the 'My Profile' validation page. The page has a header 'Hello Valued Broker, Welcome to the NEW Broker Self Service Tool!'. Below this, it says 'Here you will be able to... View your own Broker Data & Submit New Requests'. On the left, there are radio buttons to 'Choose Type' between 'Business Entity' and 'Individual Selling Agent'. Below these is a 'Tax Id or SSN' input field and a 'Validate' button. On the right, there is a 'Quick Reference Guide' with instructions for both Business Entity and Individual Selling Agent users, noting that License(s) and National Producer Number (NPN) must match the provided name and ID.

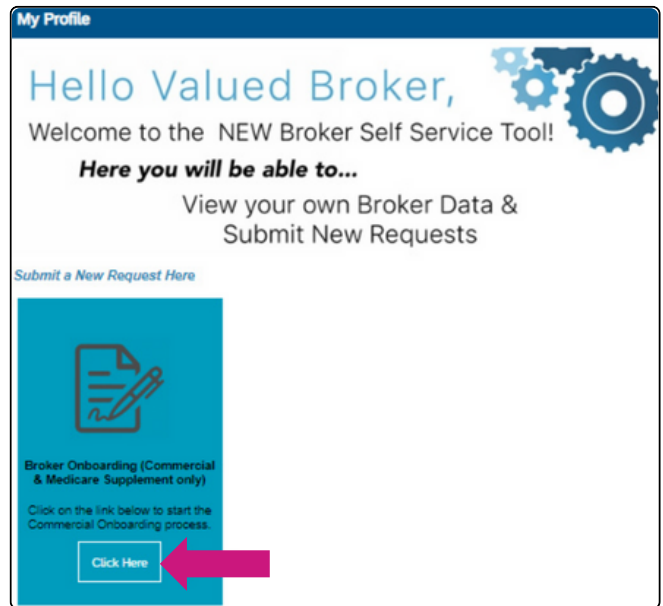
Note! You will only need to complete this validation step once, during your first login. Validation must have the TIN or SSN entered with no dashes or spaces, numbers only.

Onboarding

Submit a Broker Onboarding Request

After completing validation in the prior step, continue with the following to begin the onboarding process:

- Click on the blue tile labeled **Commercial & Medicare Supplement Broker Onboarding**.



Broker Onboarding

- To begin, click the **Create Case for CA** button.



Create Case

Upon selecting the checkbox, you agree to the use of electronic signatures when signing any document in this application. A unique public and private key will be stored for your signature and will be used on any official documents that require your signature. This signature will be a representation of you and will be treated as such. *

☒ I Agree

Contracts for States

Direct Deposit (EFT Form)

W-9

Select Additional Forms: ☐ Web Registration

Line of Business: * --select--

Contract State * --select--

Next >

Notifications ▾

Onboarding

Broker Onboarding

Complete the following on the **Broker Onboarding** Window:

- To begin, check the **I Agree** box .
- On Select **Additional Forms**, check **Web Registration** and **Direct Deposit (EFT Form)**.
- Select **Commercial** under **Line of Business**.
- Select **CA** for the Contract State.

The screenshot shows the 'Broker Onboarding' window. At the top, there is a disclaimer about electronic signatures and a checkbox labeled 'I Agree' with a pink arrow pointing to it. Below this are three tabs: 'Contracts for States', 'Preliminary Agent Information Form', and 'W-9'. Under 'Select Additional Forms', there are checkboxes for 'Web Registration' and 'Direct Deposit (EFT Form)'. The 'Line of Business' dropdown menu is open, showing options like 'Commercial' with a pink arrow pointing to it. The 'Contract State' dropdown menu is also open, showing options like 'AZ', 'CA', and 'OR' with a pink arrow pointing to 'CA'. A 'Next' button is on the left and a 'Submit' button is at the bottom right.

- Additional **onboarding tabs** will appear as you make the above selections:
 - Contracts for States
 - Web Registration Form
 - W-9
 - E&O

This screenshot shows the 'Broker Onboarding' window after several selections. The 'I Agree' checkbox is now checked. The 'Web Registration' and 'Direct Deposit (EFT Form)' checkboxes are also checked. The 'Line of Business' dropdown is still open, showing 'Commercial' selected. The 'Contract State' dropdown is also open, showing 'CA' selected. A pink rectangle highlights the 'Line of Business' and 'Contract State' dropdowns. The 'Next' button is on the left and the 'Submit' button is at the bottom right. The tabs at the top now include 'First Piece of Business', 'Web Registration Form', 'Direct Deposit (EFT Form)', 'W-9', and 'E&O'.

Onboarding

Onboarding Tabs Tips

This section highlights each onboarding tab's commonly asked questions and how to complete them.

Contract for States

- When filling out the name, list only the name contracting and confirm with the DOI that the name is allowed to be used in California.
 - Only use the DBA name or the Broker's name, **NOT BOTH**.
- The name submitted has to be an exact match as the DOI CA license.
- Please ensure that signatures and titles are consistent. Contracting will not process mismatching signatures or titles.
- Examples of acceptable titles:
 - Individual Broker- Owner | Principal | CEO | Broker
 - Business Name – CEO | Owner | Principal

Broker Onboarding

Upon selecting the checkbox, you agree to the use of electronic signatures when signing any document in this application. A unique public and private key will be stored for your signature and will be used on any official documents that require your signature. This signature will be a representation of you and will be treated as such. *

☐ I Agree

Contracts for States

First Piece of Business

Web Registration Form

Direct Deposit (EFT Form)

W-9

E&O

Select Additional Forms: ☐ Web Registration
☐ Direct Deposit (EFT Form)

Line of Business: *

Commercial

Contract State *

CA

BROKER AGREEMENT

Do you intend to sell IFP, Group or Both.

--select--

Part I. AGENT / BROKER INFORMATION

(ALL INFORMATION IS REQUIRED TO PROCESS COMMISSION PROPERLY)

PLEASE CHECK APPROPRIATE BOXES: *

☐ INDIVIDUAL/SOLE PROPRIETOR
☐ CORPORATION
☐ PARTNERSHIP
☐ OTHER

LICENSED AGENT / BROKER NAME: *

DBA:

Onboarding

Onboarding Tabs Tips Continued

This section highlights each onboarding tab's commonly asked questions and how to complete them.

Web Registration

- Leave Broker ID blank since it has not yet been provided.
- If you are unsure of your username, enter in the same username used in Workflow.

Direct Deposit

- Choose new direct deposit.
- Do not enter in a Broker ID since it has not yet been provided.

W9

- Check off entity type in box 3.
- Scroll down to add signature.
- Ensure that the broker information is in the correct field at the top of the W-9.

Onboarding

Onboarding Tabs Tips Continued

This section highlights each onboarding tab's commonly asked questions and how to complete them.

E&O

- Be sure to upload the E&O that does not include the "&" symbol in the file name.

The screenshot shows the 'Broker Onboarding' form. At the top, there is a blue header with the title 'Broker Onboarding'. Below the header, a paragraph states: 'Upon selecting the checkbox, you agree to the use of electronic signatures when signing any document in this application. A unique public and private key will be stored for your signature and will be used on any official documents that require your signature. This signature will be a representation of you and will be treated as such. *'. Below this text is a checkbox labeled 'I Agree' which is checked. A row of five tabs is displayed: 'Contracts for States' (Incomplete), 'First Piece of Business' (Incomplete), 'Web Registration Form' (Incomplete), 'Direct Deposit (EFT Form)' (Incomplete), and 'W-9' (Incomplete). The 'E&O' tab is currently selected and highlighted. Below the tabs, the 'E&O' tab is labeled 'Incomplete'. A red warning message reads: 'Please do not use the '&' symbol on the name of your file'. Below this, there is a text input field labeled 'Upload E&O *' with a red '(required)' label below it. To the right of the input field is a blue upload icon. At the bottom left is a 'Previous' button, and at the bottom right is a blue 'Submit' button.

Complete Onboarding

Click **Submit** when all tabs are completed to finish onboarding.

Additional Tips

- Do not mix entity information.
 - If the contract is for an individual then the NPN and SSN for the individual should be on the form. No reference to a TIN.
 - If the contract is for an agency, then the NPN and TIN must be for the business entity, no reference to a SSN should be on the form. If there is, then that is an indication that you are in the wrong Workflow account or that Workflow was registered incorrectly.
- Once the onboarding request is submitted a message will appear. "Your request has been submitted for review."
 - No confirmation number or onboarding request will be available at this time under "My Requests."
- Allow 5-10 business days to process onboarding.
- You will receive a welcome email once onboarding is complete.

Welcome Letter

Great Job! You have completed Broker Onboarding.

Your onboarding is now being reviewed by our contracting team. Please allow 5 - 10 business days for the contracting team to complete the review process. Once complete and approved, a welcome letter will be emailed to you if you are a new broker.

If additional documentation is required, you will receive a email notification advising you on the changes required. You will need to return to your request and update it accordingly as stated on the email.

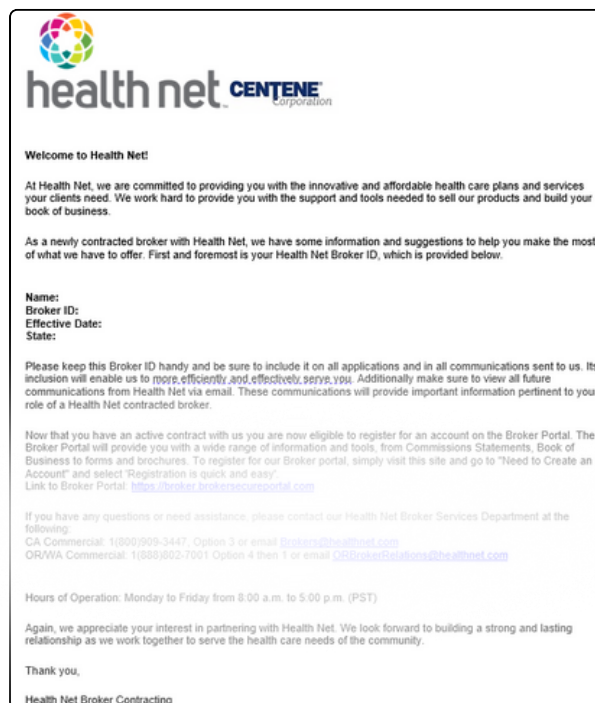
Note! Please refrain from selling until you receive your Welcome Letter email.

- An Incomplete email will be sent if there are errors or corrections requested.
- Time frame is 14 days to complete updates. Then the case is Shelved. A new request will be required.

To edit the case: Login to Workflow using the login credentials that you created at <https://social.webcomserver.com/wpm/?tenantName=hlth>

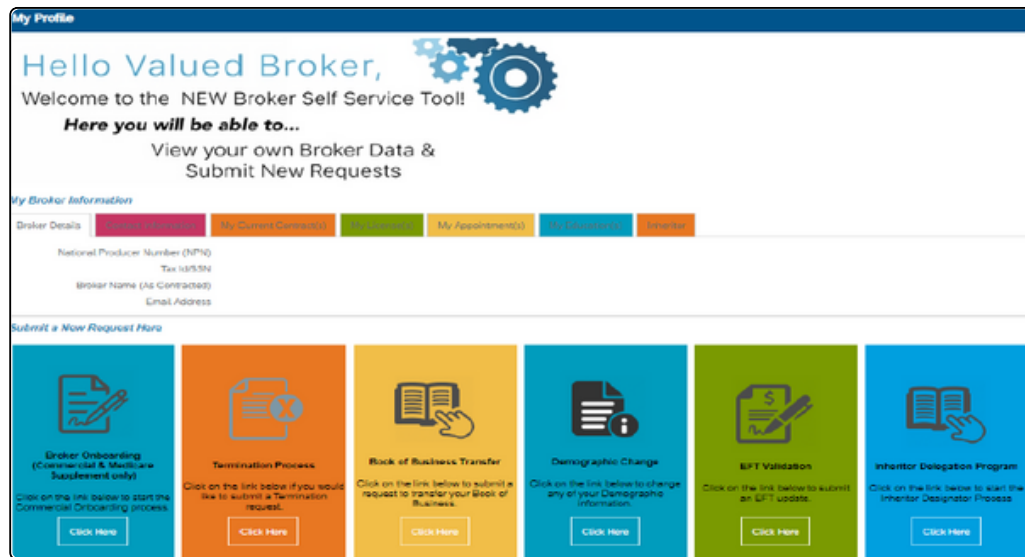
Once logged in, the case will appear on the landing page (“My Requests”). Click on the request to access the case. Click, “resubmit” then click “edit”. You will now be able to edit the case by using the tabs similar to the original onboarding request. Correct the case and make sure all the necessary updates are made according to the letter received by the Contracting Department.

Welcome Email



Request Types

Once you are fully onboarded, you will have full access to the Online Self Service Tool. Here is a list of request types available through this tool.



Broker Onboarding

As a New Broker, your first step is to submit a Broker Onboarding request to become contracted with us.

Termination Request

Request to terminate your current contract.

Book of Business Transfer

Request to transfer your current Book of Business to another Contracted Broker.

Demographic Change

Request to change your address, email, or phone number.

EFT Validation

Request to update your Electronic Funds Transfer (EFT) Banking information.

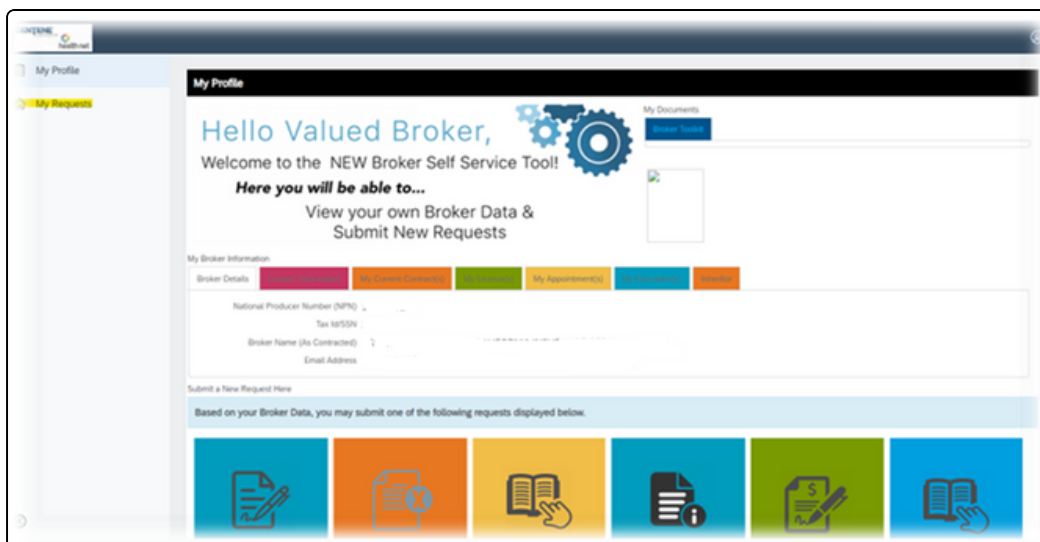
Inheritor Delegation Program

Request that upon your death the Inheritor Agent delegated will be eligible to receive a Book of Business transfer upon such event and all applicable commissions/renewals will be transferred to the delegated agent.

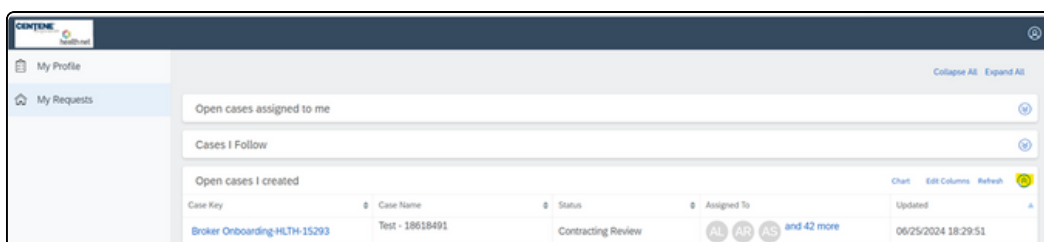
Edit an Incomplete Case

Follow the steps below to edit or resubmit an existing case.

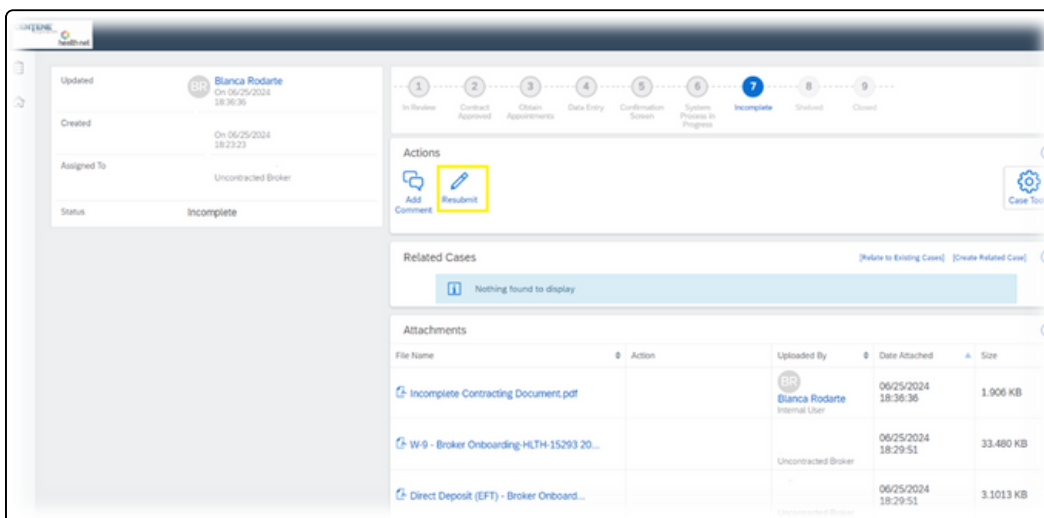
1. Click My Requests



2. Click the arrow on the right side of the page in the Open Cases I Created box.

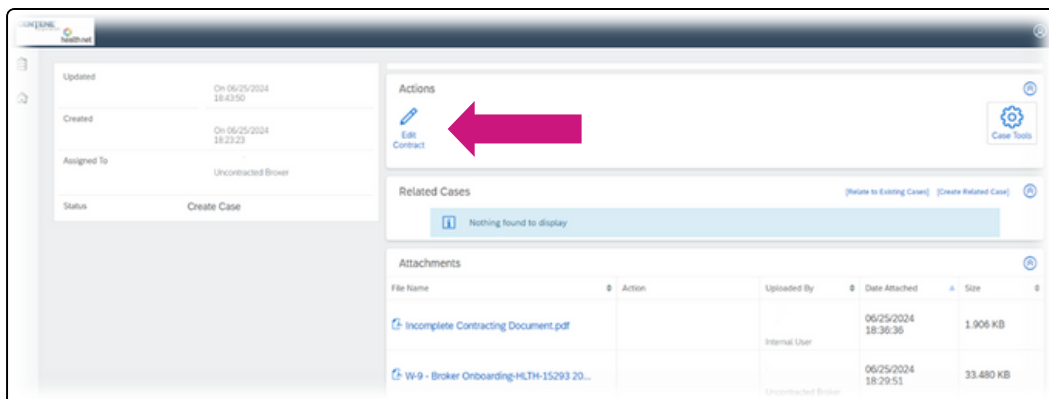


3. Click on resubmit to edit the case.



Edit an Incomplete Case

4. Click Edit Contract



5. The case can now be updated.

The screenshot shows the Health Net Broker Services interface with the 'Edit Contract' form open. The form has a title bar 'Edit Contract' and a close button. Below the title bar, there is a red message: 'Please click the Submit button at the bottom of the form to submit your changes.' The form contains a checkbox for 'I Agree' and a text area for 'Upon selecting the checkbox, you agree to the use of electronic signatures when signing any document in this application. A unique public and private key will be stored for your signature and will be used on any official documents that require your signature. This signature will be a representation of you and will be treated as such.' Below this, there are tabs for 'Contracts for States', 'Direct Deposit (EFT Form)', 'W-9', and 'E&O'. The 'Contracts for States' tab is selected. The form has a 'Select Additional Forms' section with a checkbox for 'Web Registration'. Below this, there is a 'Contract State' dropdown menu set to 'CA' and a 'Line of Business' dropdown menu set to '--select--'. At the bottom, there is a 'BROKER AGREEMENT' section with a red message: 'Do you intend to sell IFP, Group or Both.' and a dropdown menu set to 'Group/IFP'. The footer of the form says 'Part 1: AGENT / BROKER INFORMATION'.

Contact Support

For support please contact the Health Net Broker Services Team:

Phone: 1 800 909 3447 - Option 3

Email: Brokers@healthnet.com