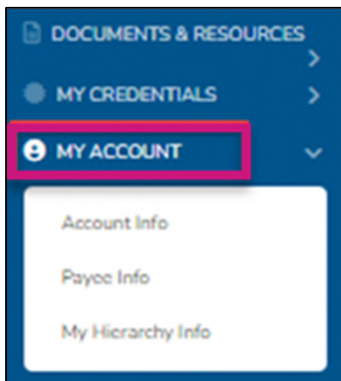


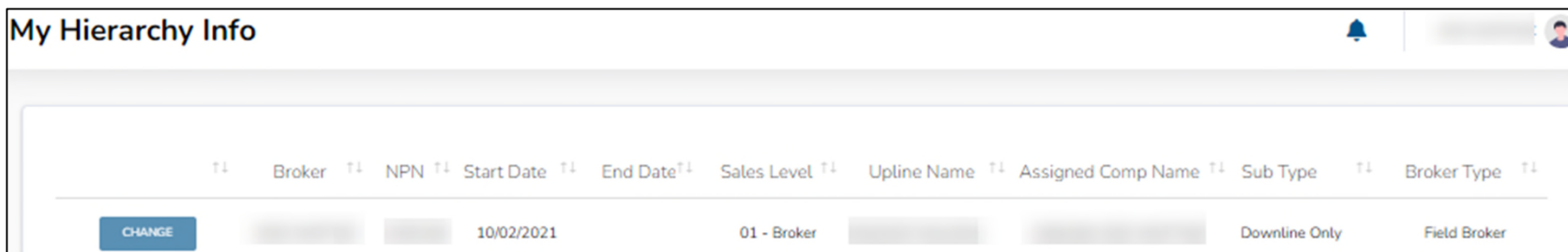
My Account

My Hierarchy Info

The My Hierarchy Info tab provides a snapshot of the level, upline information (if applicable), compensation assignment, Sub Type, and Broker Type.



- This tab will also provide upline history and the time spans where you were reporting to a different upline or were a different sub type.
- To make a change to your upline or compensation assignment, please select the **Change** button.



	Broker	NPN	Start Date	End Date	Sales Level	Upline Name	Assigned Comp Name	Sub Type	Broker Type
CHANGE			10/02/2021		01 - Broker			Downline Only	Field Broker

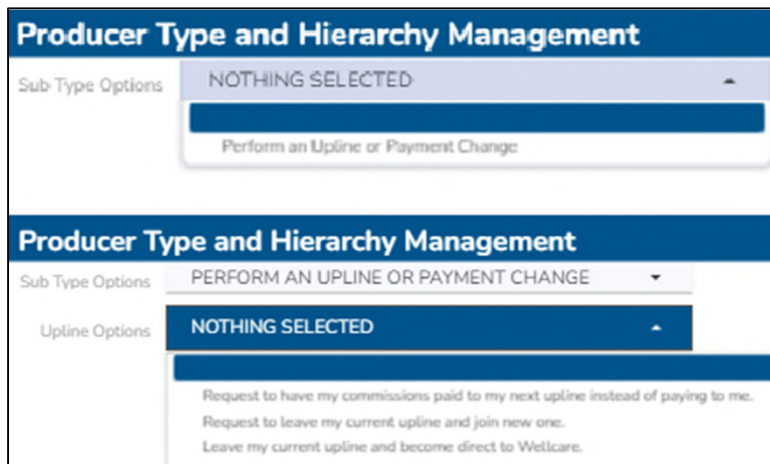


My Account

My Hierarchy Info – Make Changes

- Once the Change button has been selected, a new window will open
- The summary of the current situation will populate to confirm the current set up
- Select the **Perform an Upline or Payment Change** option from the drop-down menu
- Select from the following options:
 - Request to have my commissions paid to my next upline instead of paying to me
 - Request to have my commissions paid to me instead of to my next upline
 - Request to leave my current upline and join a new one
 - Leave my current upline and become direct to Wellcare

Note: The options available will be dependent on current subtype



Producer Type and Hierarchy Management

Sub-Type Options: NOTHING SELECTED

Perform an Upline or Payment Change

Producer Type and Hierarchy Management

Sub-Type Options: PERFORM AN UPLINE OR PAYMENT CHANGE

Upline Options: NOTHING SELECTED

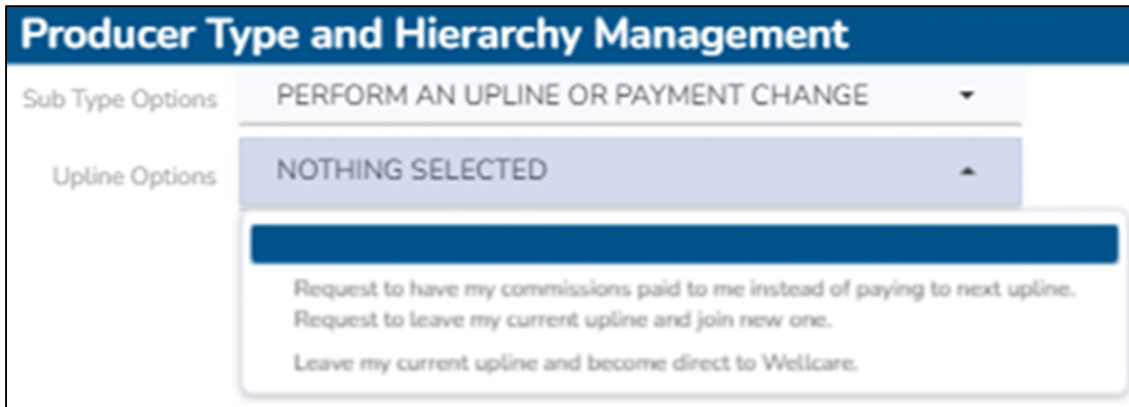
- Request to have my commissions paid to my next upline instead of paying to me.
- Request to leave my current upline and join new one.
- Leave my current upline and become direct to Wellcare.



My Account

My Hierarchy Info – Make Changes, Cont.

- If the commission assignment is changed to self, a prompt will display to complete a W9 and provide ACH information.
- If a request to go Direct to Wellcare is selected, the request will process immediately.
 - If the previous subtype was Dual Assignment, it will also be required to complete a W9 and provide ACH information

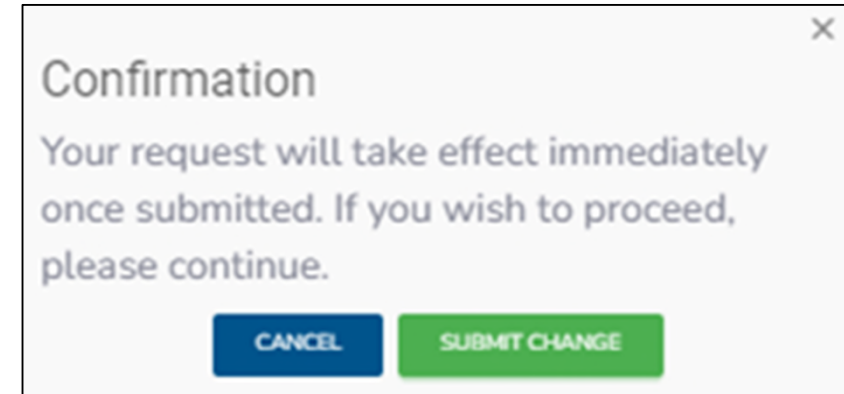


Producer Type and Hierarchy Management

Sub Type Options: PERFORM AN UPLINE OR PAYMENT CHANGE

Upline Options: NOTHING SELECTED

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



Confirmation

Your request will take effect immediately once submitted. If you wish to proceed, please continue.

CANCEL SUBMIT CHANGE



My Account

My Hierarchy Info – Make Changes, Cont.

- For a request to change your hierarchy, determine if you will receive your own commissions or if they will be assigned to your new requested upline
- Provide the name or NPN of this requested upline
- Once the correct next upline is selected, select **Update**

Note: If you are an LOA Field Broker, you must first request to be released from the LOA subtype. Please contact Sales Support or your upline for assistance to process these changes.

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

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

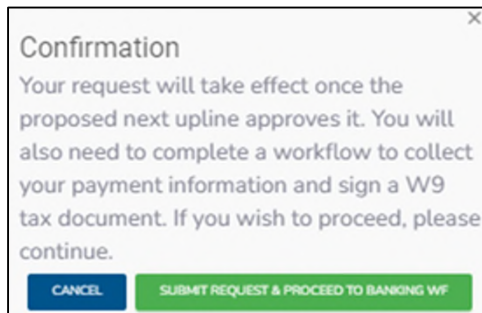
Producer Type and Hierarchy Management	
Sub Type Options	PERFORM AN UPLINE OR PAYMENT CHANGE ▾
Upline Options	REQUEST TO LEAVE MY CURRENT UPLINE AND JOII ▾
Will your new upline be receiving your commissions or will they be paid to you?	I WILL GET PAID MY COMMISSIONS. ▾
Next Upline	
	UPDATE



My Account

My Hierarchy Info – Make Changes, Cont.

- Select **Update**, then confirm to submit this request to the new proposed upline.
- The proposed upline will receive a request within their own portal to either accept or deny your request to join their hierarchy.
- If they accept, your hierarchy information will update as of the accepted date.
- If they deny, your current hierarchy information will remain active. Submit a new change request.



- Once the request is submitted, your current hierarchy line will update to Request Pending, and you will not be able to submit additional changes.
- To view more details about the submitted request, select **Request Pending** to be directed to Workflows. Cancel the request is an option from this window as well.

Broker	NPN	Start Date	End Date	Sales Level	Upline Name	Assigned Comp Name	Sub Type	Broker Type
Request Pending		10/01/2021		01 - Broker			Dual Assignment	Field Broker

