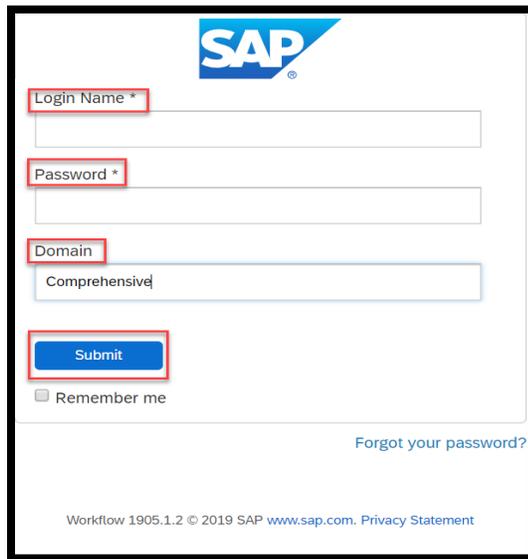


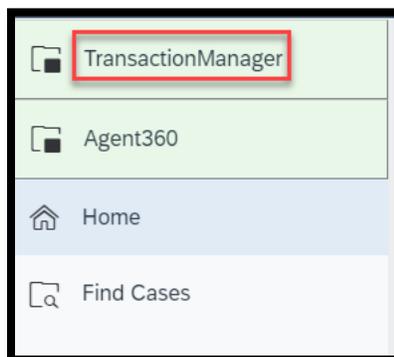
Workflow

1. Access web page <https://social.webcomserver.com/wpm/index.jsp?logoff=true>
2. Enter your login credentials
 - a. Password
 - b. Domain = Comprehensive
 - c. Click on the Submit Button



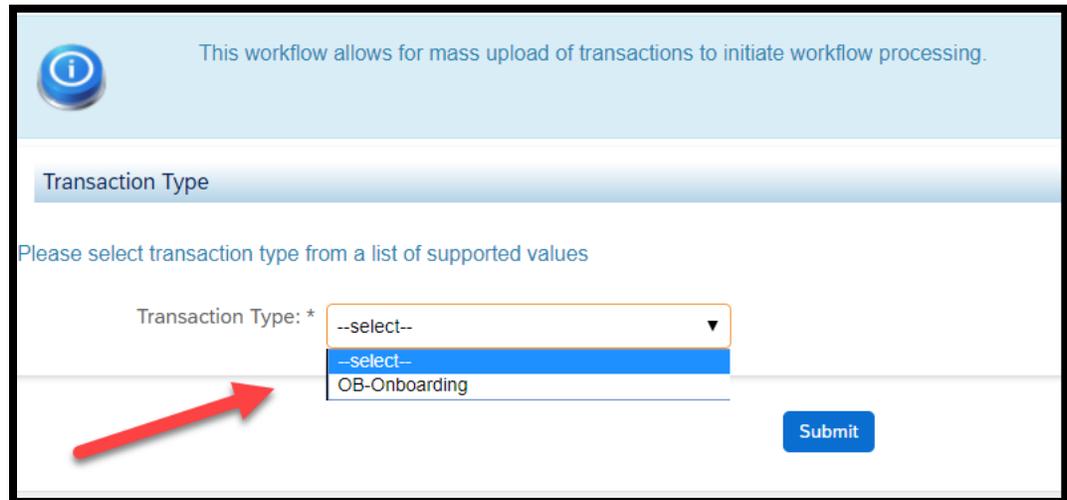
The screenshot shows the SAP login interface. At the top center is the SAP logo. Below it are four input fields: 'Login Name *', 'Password *', and 'Domain'. The 'Domain' field contains the text 'Comprehensive'. Below the input fields is a blue 'Submit' button. Underneath the button is a checkbox labeled 'Remember me'. At the bottom right of the form area is a link that says 'Forgot your password?'. At the very bottom of the page, there is a small copyright notice: 'Workflow 1905.1.2 © 2019 SAP www.sap.com. Privacy Statement'.

3. Click on TransactionManager



4. Select OB- Onboarding

a. (external view)



This workflow allows for mass upload of transactions to initiate workflow processing.

Transaction Type

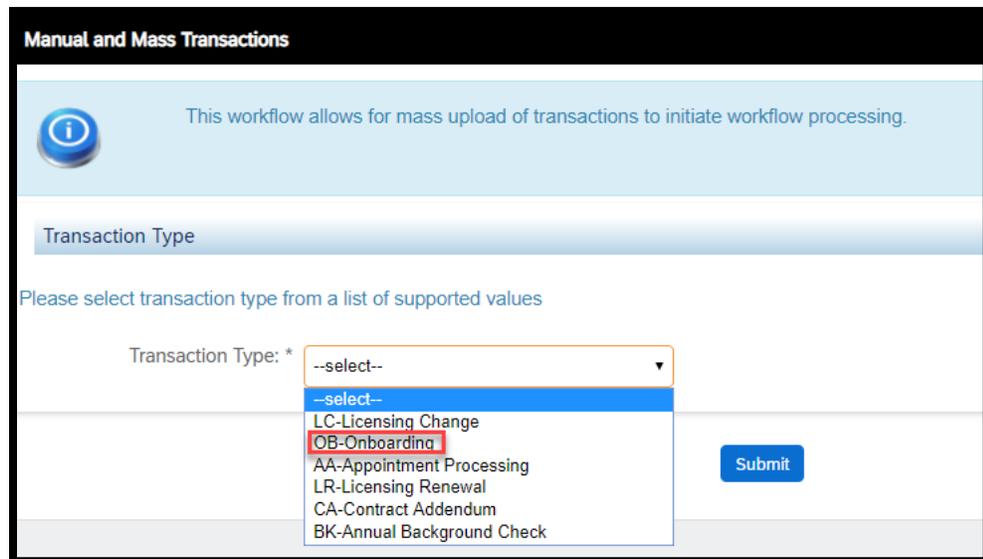
Please select transaction type from a list of supported values

Transaction Type: * --select--

- select--
- OB-Onboarding

Submit

b. (Internal view)



Manual and Mass Transactions

This workflow allows for mass upload of transactions to initiate workflow processing.

Transaction Type

Please select transaction type from a list of supported values

Transaction Type: * --select--

- select--
- LC-Licensing Change
- OB-Onboarding
- AA-Appointment Processing
- LR-Licensing Renewal
- CA-Contract Addendum
- BK-Annual Background Check

Submit

5. Select File Upload

Manual and Mass Transactions

This workflow allows for mass upload of transactions to initiate workflow processing.

Transaction Type

Please select transaction type from a list of supported values

Transaction Type: *

Please choose between **File Upload** or **Manual Selection** below.

Template Upload

- In **Template Upload** mode, user can upload an Excel file containing one or more onboarding invitations

Manual Invite

- In **Manual Invite** mode, the user will be able to search for a producer and build a record manually.

Template Upload or Manual: Template Upload Manual Invite

6. Click on the Arrow to upload Bulk invitation Templet

Bulk Invite Template Requirements

Bulk Invite/Onboarding(OB) template Data Rules

- Column A** - Type (Value must be entered with the valid transaction type identifier 'OB' on template)
WARNING: Any line that does not start with the transaction type identifier OB will be ignored.

***REQUIRED FIELDS:**

- Column B - Producer First Name
- Column C - Producer Last Name
- Column D - Producer Email address
- Column F - Upline Contract ID
- Column I - Title(This field should be populated with one of these values: CAP, PDCR, GA, MGA or SGA)

OPTIONAL FIELDS:

- Column E - Upline Producer ID
- Column G - Target Execution Date
- Column H - Priority (Priority (This field should contain NORMAL or HIGH if populated)
- Column J - Full Assignment (If set to Y, Full Assignment rules will apply)

Transaction File *  

Submit

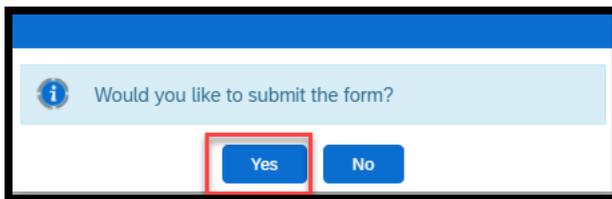
7. Click Submit

8. Bulk Invitation Must Include the Following

- a. Type = OB
- b. First Name
- c. Last Name
- d. Email
- e. Upline ID (Can be blank)
- f. Upline Contract ID
- g. Target Execution Date (Can be Blank)
- h. Priority (Can be Blank)
- i. Title (level)
- j. Full Assignment = y
 - i. Leave blank if Upline only
- k. Compensation Assignment

A	B	C	D	E	F	G	H	I	J
TYPE	FIRSTNAME	LASTNAME	EMAIL	UPLINEID	UPLINECONTRACTID	TARGETEXECUTIONDATE	PRIORITY	TITLE	Full Assignment
OB	Full	PDCR	Test@wellcare.com		CONT_300014			PDCR	Y

9. Click Yes to Submit the Form



10. This will create a Manual and Mass Transaction case

- a. Refresh the page
- b. Review for Errors

Transactions > Manual and Mass Transactions-A-4138

Status: Validation Errors Review

Updated:  Michelle Davila
On 06/20/2019 19:36:13

Created:  Michelle Davila
On 06/20/2019 19:36:10

Assigned To:  Michelle Davila
LicensingSpecialist

File Validation Details 

NOTE: If the file contains errors, valid rows will be committed only after user confirmation.

Transaction Type: **OB-Onboarding**

Transaction File:  FULL_NON.xlsx

File Row Count: 19

Valid Row Count: 4

Error Row Count: 4

Ignored Row Count: 11

11. If there are any error
 - a. Click on Review Errors

Review Errors 

The uploaded transaction file contains rows which failed system validation.
Please review errors and choose to Continue or Abort the process.

Validation Details 

Validation Messages
Please review validation errors determined by the system.

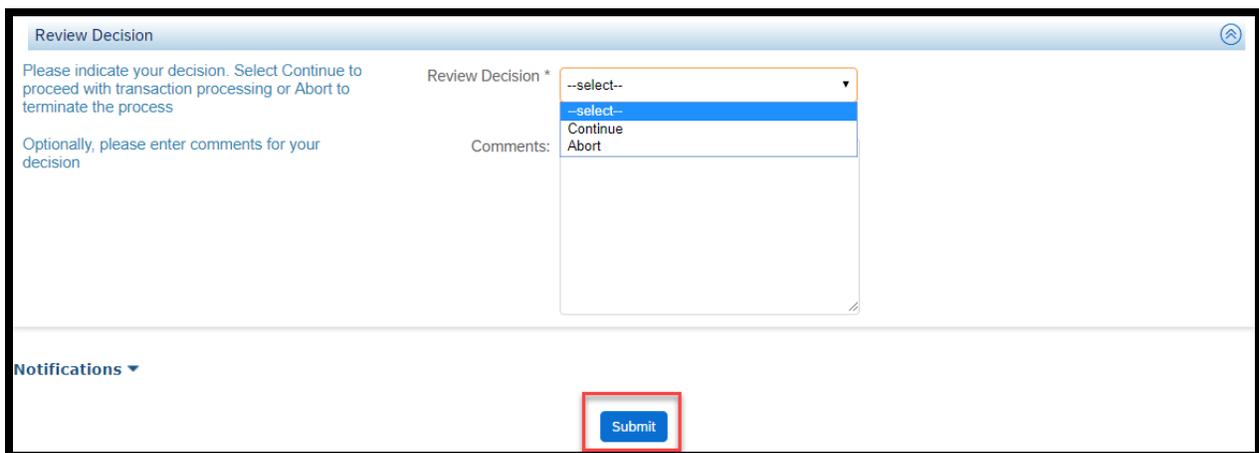
Validation Messages 

Row	Error	First Name	Last Name	Email	Title	Upline Id	Upline Contract Id	Target Execution Date	Target Completion Date
4	Invalid row values. If Full Assignment Indicator is set to No (N or Blank), Commission Assignment Producer Id cannot be populated. Row contains value [redacted]	Full	MGA	[redacted]	MGA	[redacted]	[redacted]	06/20/2019 00:00:00	
5	Invalid row values. If Full Assignment Indicator is set to No (N or Blank), Commission Assignment Producer Id cannot be populated. Row contains value [redacted]	Full	SGA	[redacted]	SGA	[redacted]	[redacted]	06/20/2019 00:00:00	

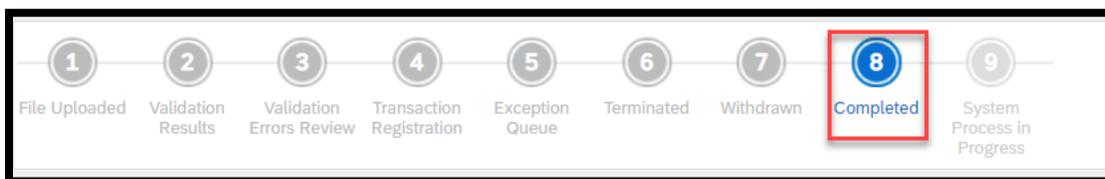
2 total rows, displaying from 1 to 2

12. After reviewing errors you can select

- a. Continue
 - i. If selected any line that did not have an error will continue and an invitation will be initiated
 - ii. Any errors will have to be resubmitted
 - iii. Comments the reason why this was chosen
- b. Abort
 - i. If Selected this will abort all invitations
 - ii. Comments the reason why this was chosen



13. If no errors the invites will be initiated



******* Please note the invites are released every 30 minutes *******