CareSource ACA Contracting Directions through Benavest

IMPORTANT!

You cannot have two different uplines for CareSource ACA & MA. The onboarding contract will also have the option to contract in MA.

IMPORTANT!

If you are already contracted with **CareSource ACA**, please refer to **TRANSFER INSTRUCTIONS FOR CARESOURCE ACA**.

CareSource ACA Contracting for New Agent

Carrier States

- **GA, IN, KY, MI, NC, OH, WV (ACA Only)**

Step 1: Request Contract

Request Contract from Benavest by emailing office@benavest.com with the Subject: **CareSource ACA: Contracting Request**

Step 2: Confirmation Email

Once Benavest receives your request, you'll receive an email confirming the state appointments you want to be with CareSource.

> Subject: **CareSource ACA - Confirmation of Request**
> From: **office@benavest.com**

Step 3: Onboarding Invitation Request

Once we submit the request to the carrier, you'll receive an invitation from the carrier.

CareSource Onboarding Invitation

Subject: **CareSource Onboarding Invitation**
From: **donotreply@webcomserver.com**

Step 4: Complete the Onboarding Invitation

Once you receive the onboarding invitation, follow the steps belowa;

Access your application once you receive it:
https://social.webcomserver.com/wpm/index.jsp

Username: (Agent's Email Address)
Password: (This is the password you initially used. If you can't recall the password or never received it, use the "Forgot Password?" feature at the bottom right.)
Domain: csou

Once you have logged in, to insure a smooth and successful submission, please follow the tips below one-by-one (ESPECIALLY #9)

1. Make sure you have completely logged out of your browser before clicking the link to access the portal.
2. You must type in the Username and Password. You cannot cut/paste. AGENCY TYPE is "AGY". If your login credentials do not work, please use the "Forgot Password" feature. If you do not receive a reset password email, please notify us and we will have your credentials reset and sent to you.
3. When uploading documents, please make sure the upload is complete before moving to the next tab. Click "Save" and "Next" on each screen.
4. Certifications: You will have the ability to select "Medicare" as a product. If you only want to sell Marketplace, please make sure you do not select the Medicare box. If you have done this in error, please uncheck the "Medicare" box and delete your AHIP certificate. You must upload a copy of your 2022 FFM Certification that you can download from CMS Marketplace Learning Management System (MLMS).
5. Background Agreement: Please click on the "Background Screening Disclosure", "Fair Credit Reporting Act Summary of You Rights" and "Background Screening Authorization" boxes and sign each document.
6. Banking Information (You will not see this tab if you are getting appointed as a LOA): You will need to provide ACH information. If you are assigning commissions to an agency, please provide the agency banking information if it is available. If not, simply populate the fields with "dummy" data as the system will not allow you to move forward until you do. The Agency ACH information will be captured during the Agency appointment.

7. Code of Conduct Tab: Please make sure you scroll down and click the "Accept" box, and that this document is signed.
8. W-9 (You will not see this tab if you are getting appointed as a LOA): When you complete your individual appointment, the W-9 will populate your personal information. If you are assigning commissions to your agency, we realize that your personal information should not be on the W-9. Unfortunately, this is how the system was designed. Make sure the W-9 is populated and continue. Agency ACH information will be captured during the Agency appointment process.
9. MOST IMPORTANT: eSignature Tab: Please click “Continue”, then populate your signature and initials. Scroll down to the bottom and click “Finish”. You will then receive a popup that says. “Thank you! Thank you for completing the eSignature portion of the application. You may now navigate to the Education tab to take your product training.” No product training is necessary is necessary if you are just getting appointed for Marketplace. It is required if you are getting appointed to sell Medicare Advantage. SCROLL DOWN TO BOTTOM and click the “Submit” button. The “Submit” button is located at the bottom of the page and many agents fail to click it to submit the appointment after completing the signature.

Step 5: Appointment Confirmation

Once you have successfully completed and submitted the onboarding application, the carrier will review it. Upon approval, you will receive a confirmation email.

> Subject: **Welcome to CareSource!**
> From: **SalesSupport@caresource.com**

IMPORTANT!

If you are already contracted with **CareSource ACA**, please refer to **TRANSFER INSTRUCTIONS FOR CARESOURCE ACA**.

Transfer Instructions for CareSource ACA

*Please note transfers are **NOT** permitted from **September 1 – December 31**.*

Option 1: Transfer with a signed release

1. You must have been under your current top of hierarchy for at least three consecutive months.
2. Print the **Notice of Intent – Transfer Release Form** and complete the **Transfer Release portion**.

Transfer Release Option

There is no waiting period to process a change using the transfer release option.

1) **Requesting for:** ☐ Agent Only ☐ Agent and Downline
2) **Name of New Upline:** _____

3) **Name of Individual Agent or Agency Requesting Release:**

_____ _____
Agent Name Agency Name

_____ _____
Signature and Date National Producer Number or TIN

4) **Approval from your current immediate upline (if applicable):**

_____ _____
Agent Name Agency Name, if applicable

_____ _____
Signature and Date National Producer Number or TIN

5) **Approval from your current top of hierarchy (if different from immediate upline):**

_____ _____
Name (Principal of Agency) Agency Name

3. Obtain signatures from your immediate upline and the principal of your top of hierarchy (if different) to authorize release. Signatures must be within 30 calendar days from date of submission to CareSource.

Your browser does not support PDF. Click here to download.

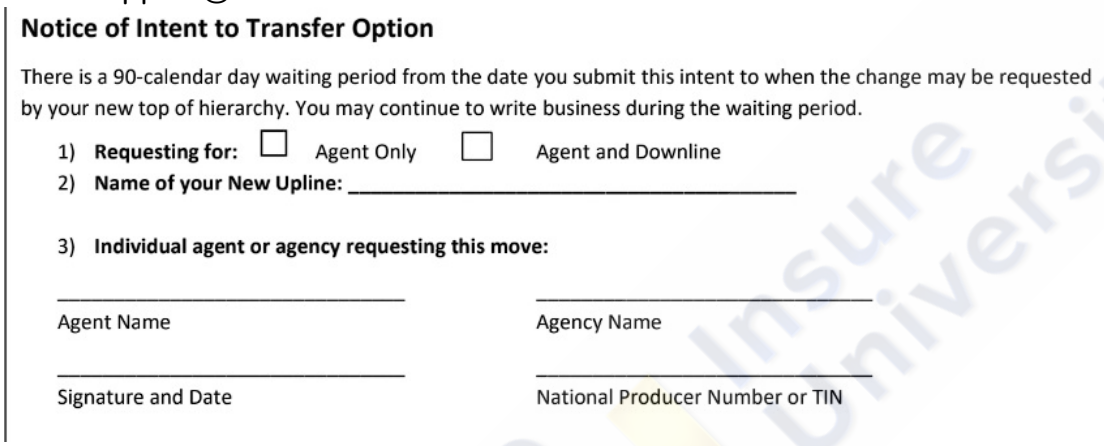
4. Submit the completed form:

- **To: Contracting@AspireBenefits.com**
- **CC: office@benavest.com**
- **Subject: [Your Name / and NPN] - Transfer to Benavest**
- **Body of the email:**

> Good day! Please receive my request to transfer to Benavest / 17635734. Thank you!

Option 2: Notice of Intent to Transfer

1. You must have been under your current top of hierarchy for at least three consecutive months.
2. Print the **"Notice of Intent – Transfer Release"** form and complete the **Notice of Intent to Transfer portion** and submit it via email to your current top of hierarchy with a carbon copy (CC) to salessupport@caresource.com.



Notice of Intent to Transfer Option

There is a 90-calendar day waiting period from the date you submit this intent to when the change may be requested by your new top of hierarchy. You may continue to write business during the waiting period.

1) **Requesting for:** ☐ Agent Only ☐ Agent and Downline
2) **Name of your New Upline:** _____

3) **Individual agent or agency requesting this move:**

_____ _____
Agent Name Agency Name

_____ _____
Signature and Date National Producer Number or TIN

3. 90 calendar days after completion of step #2, submit the completed form to CareSource Sales Operations at salessupport@caresource.com with office@benavest.com copied on the email request.

Your browser does not support PDF. Click here to download.

If this option is chosen, the following rules apply:

- You may only transfer at your current contract level. Once you are approved under your new upline, you must remain at the same level for a minimum of three months. Then, provided you meet the appropriate criteria and there is room to move upward, you will be considered eligible for advancement to the next contract level

> *Exception: Licensed-Only Agents (LOAs) have the option to transfer at the Agent level.*

- You must remain under the new hierarchy for a minimum of one year.

> All agency downline agents will move with a transferring agency. However, after the move has been completed, those downline agents are not required to stay under the new top of hierarchy for one year. They may request release or submit their own Notice of Intent to Transfer.

4. Submit the completed form:

- **To: Contracting@AspireBenefits.com**
- **CC: office@benavest.com**
- **Subject: [Your Name / and NPN] - Transfer to Benavest**
- **Body of the email:**

> Good day! Please receive my request to transfer to Benavest / 17635734.
> Thank you!

Carrier Portal

Navigate through CareSource Broker Portal: https://acprodcmsl-prod-producerportal-approuter.cfapps.us10.hana.ondemand.com/cp.portal

CareSource Support Contact Details

✉ salessupport@caresource.com
📞 (888) 230-2002

⚠ *Agents are encouraged to reach out to Benavest instead of reaching out to CareSource directly.*

Benavest Contact Details

✉ office@benavest.com
📞 (800) 893-7201 x 1610
📞💬 (954) 947-8694

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