



Personalized URL

MEDICARE ADVANTAGE JOB AID

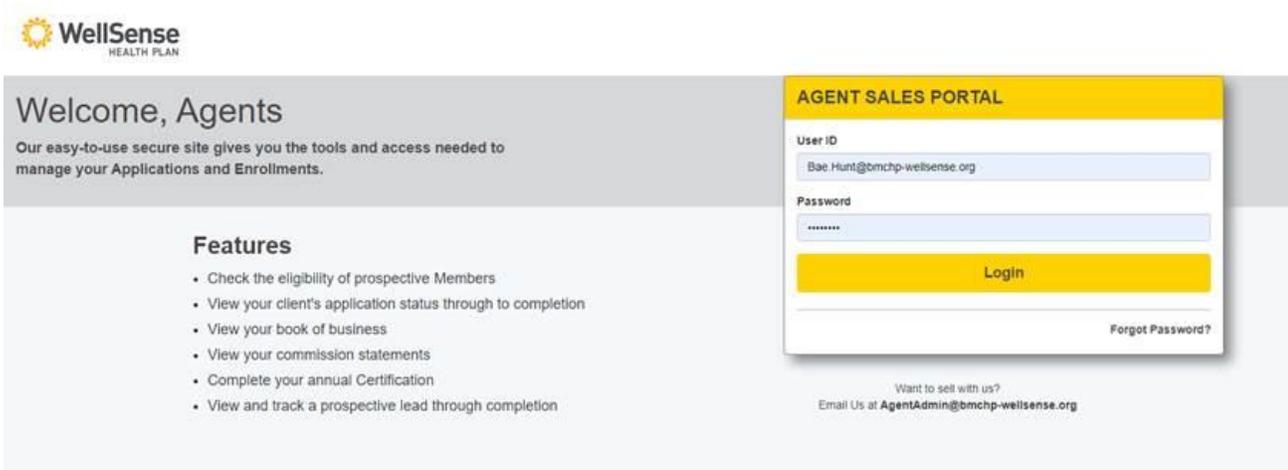
Medicare Sales Operations and Oversight

WELLSENSE HEALTH PLAN | 1155 ELM STREET, SUITE 500, MANCHESTER, NH 03101

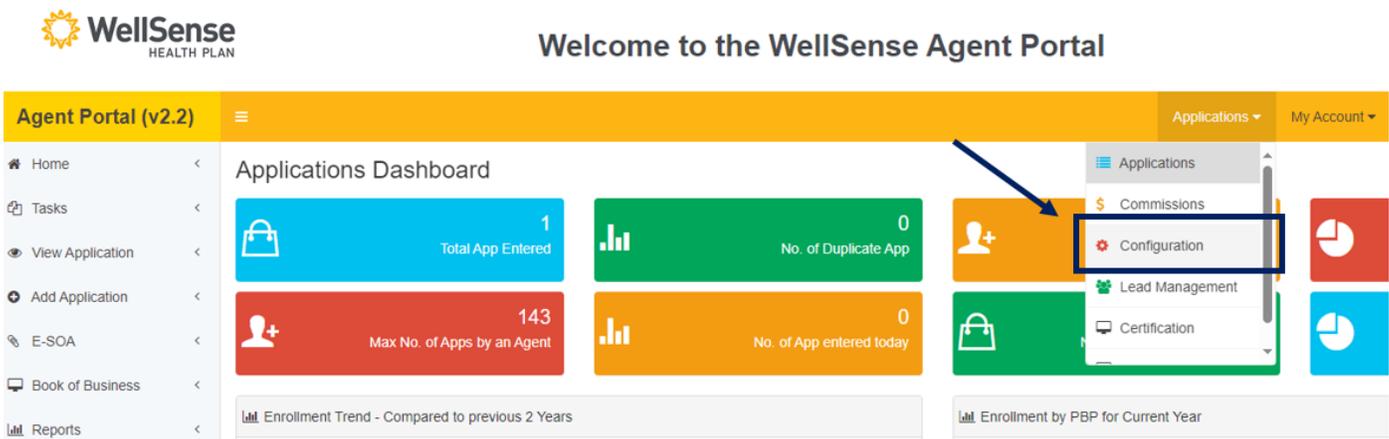
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The below are instructions on how to retrieve your personalized URL once you are Ready-To-Sell.

Step 1: Navigate and log into the Broker360 (B360) login page at agents.wellsense.org

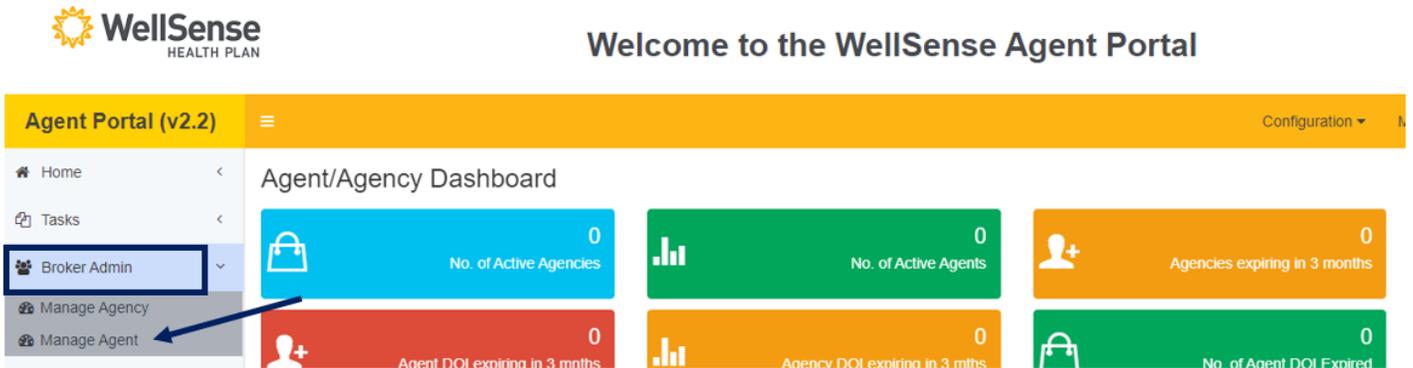


Step 2: Once you log-in, select the **Configuration** module under the module drop-down.



Step 3: Once you are in the **Configuration** module, click on the **Broker Admin** page and then click on **Manage Agent**.

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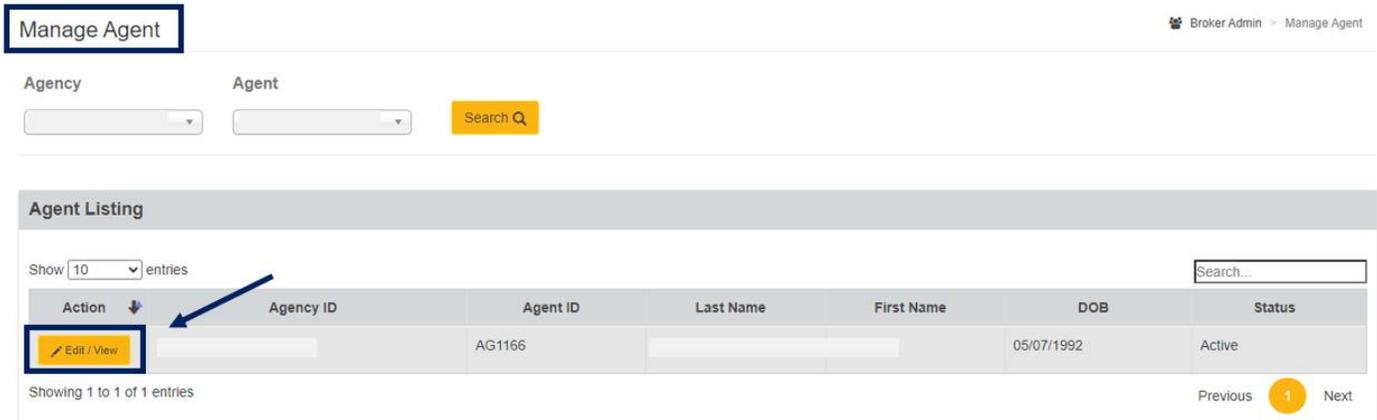


Agent Portal (v2.2) Configuration

Agent/Agency Dashboard

- No. of Active Agencies: 0
- No. of Active Agents: 0
- Agencies expiring in 3 months: 0
- Agent DOI expiring in 3 months: 0
- Agency DOI expiring in 3 months: 0
- No. of Agent DOI Expired: 0

Step 4: The **Manage Agent** screen will appear. Click the **Edit/View** button.



Manage Agent Broker Admin > Manage Agent

Agency Agent Search Q

Agent Listing

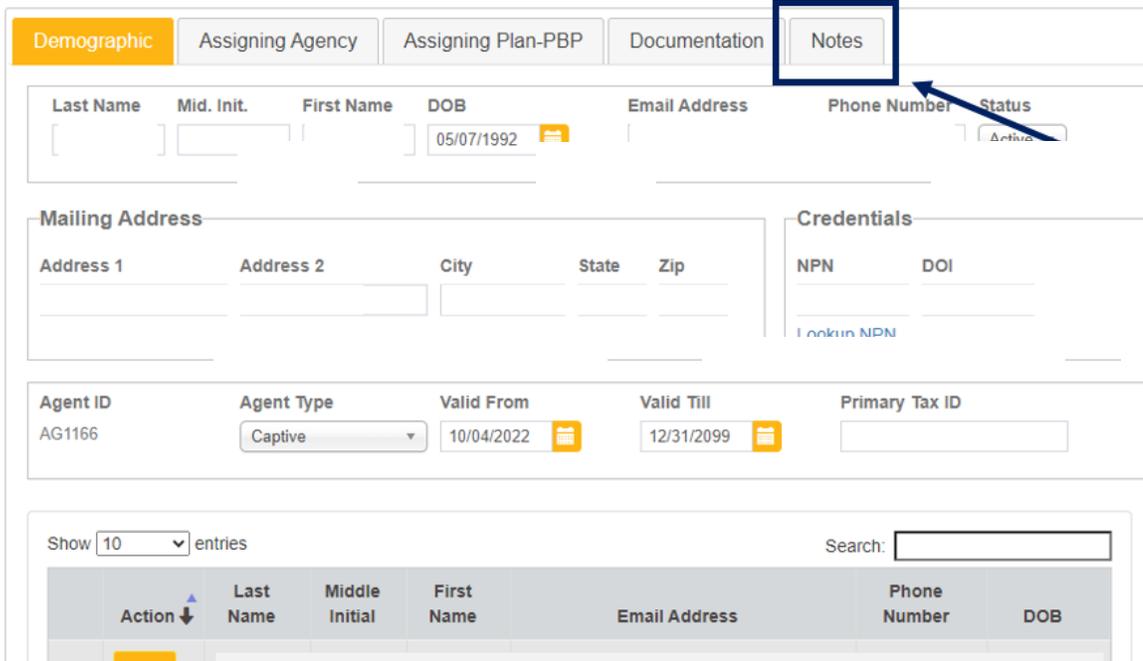
Show 10 entries Search...

Action	Agency ID	Agent ID	Last Name	First Name	DOB	Status
Edit / View		AG1166			05/07/1992	Active

Showing 1 to 1 of 1 entries Previous 1 Next

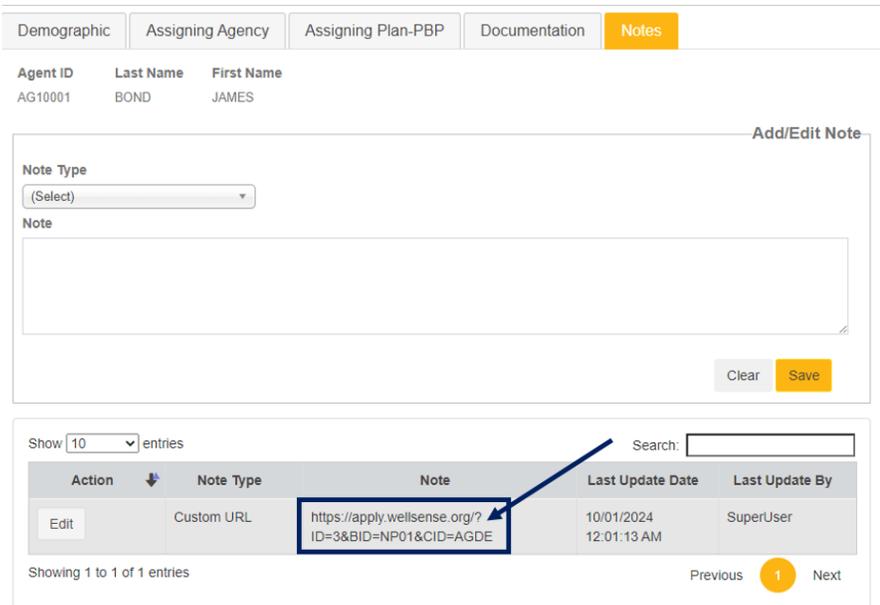
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Step 5: Click the **Notes** tab on the next screen.



The screenshot shows a user profile form with several tabs: Demographic, Assigning Agency, Assigning Plan-PBP, Documentation, and Notes. The 'Notes' tab is highlighted with a blue box. Below the tabs, there are fields for personal information (Last Name, Mid. Init., First Name, DOB, Email Address, Phone Number, Status), Mailing Address (Address 1, Address 2, City, State, Zip), Credentials (NPN, DOI, Linkin NPN), and Agent Information (Agent ID, Agent Type, Valid From, Valid Till, Primary Tax ID). At the bottom, there is a table showing a list of notes with columns for Action, Last Name, Middle Initial, First Name, Email Address, Phone Number, and DOB.

Step 6: Your personalized URL will appear at the bottom of the **Notes** tab. Example provided below. You can copy the URL directly from the **Note**.



The screenshot shows the 'Notes' tab selected. At the top, there are tabs for Demographic, Assigning Agency, Assigning Plan-PBP, Documentation, and Notes. Below the tabs, there is a form to add/edit a note with fields for Note Type (dropdown), Note (text area), and buttons for Clear and Save. Below the form, there is a table showing a list of notes with columns for Action, Note Type, Note, Last Update Date, and Last Update By. The 'Note' column contains a URL: <https://apply.wellsense.org/?ID=3&BID=NP01&CID=AGDE>, which is highlighted with a blue box and an arrow pointing to it.

Action	Note Type	Note	Last Update Date	Last Update By
Edit	Custom URL	https://apply.wellsense.org/?ID=3&BID=NP01&CID=AGDE	10/01/2024 12:01:13 AM	SuperUser

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FAQ

1.) Will my client be able to see my agent information in the online application?

- Yes, your agent information will appear on **2025** applications in the new “individual helping an enrollee” section of the application. An example is provided below.

Complete this section if you're an individual (i.e. agents, brokers, SHIP counselors, family members, or other third parties) helping an enrollee fill out this form.

Name (Please print):

Relationship to enrollee:

National Producer Number (Agents/Brokers only):

Date Application Received by Agent/Broker:



Proposed Effective Date:



For issues, please email AgentAdmin@wellsense.org