





## Broker Guide

After clicking the link in the Broker Portal or Producer World, you will be prompted to enter your NPN #, then click **Continue**.



NPN \*

**CANCEL** **CONTINUE**

## Home Page

- Start a new order by selecting a Plan Year
- Access Order Search, Pending Orders or Saved Orders from the Orders Menu
- Access Saved or Pending Orders from the Order Reminders area on the right side of the screen.

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### Item Updates

[Item Updates](#) | [Welcome](#)

#### Formularies

10/01/2015

Formularies are now available for ordering.

Did you know that our formularies now list applicable Contract PBPs on the back cover? And we also include Contract PBP information inside our Enrollments Kits by product offerings. You can use this information to easily crosswalk formularies to enrollment kits.

### Medicare Broker Materials 2017

What Plan Year?

2017

Select a Product

Please make a selection



#### Order Status FAQ

The order search feature has been enhanced. It now provides the shipping status and UPS tracking information for each item ordered. For more information regarding this feature select the "Help" button, then "Help with this page" and go to page 19 of the Guide.



#### Order Reminders

Here are your saved or pending orders awaiting completion:

User and System Saved (0)

Pending Orders (0)

## Place Order – Order Wizard

To start a new order for 2017 Materials, select a Product from the drop down.

### Medicare Broker Materials 2017

What Plan Year?

2017

Select a Product

Please make a selection

Please make a selection

2017 Aetna PDP

2017 Aetna MA

2017 Coventry PDP

2017 Coventry MA



button, then "Help with this page" and go to page 19 of the Guide.



#### Order Reminders

Here are your saved or pending orders awaiting completion:

User and System Saved (0)

Pending Orders (0)


## Place Order – Order Wizard continued

Once a Product is selected, Markets and States available to you will be shown in a list. If only one option is available, it will default. Once a Single Market and State have been selected, click **Find**



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### Item Updates

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#### Formularies

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### Medicare Broker Materials 2017

What Plan Year?

2017

What market are you ordering for?

Keystone (DE, PA, WV)

Select a Product

2017 Aetna MA

What state are you ordering for?

PA

FIND



#### Order Status FAQ

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#### Order Reminders

Here are your saved or pending orders awaiting completion:

User and System Saved (0)

Pending Orders (0)


## Place Order –Item Search Results

All items for that Market and State will be displayed. To order an item, click the Shopping Basket Icon



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HOMECATALOGSORDERS

Filter by Material Type

☐ Kit

☐ Formulary


☐ Plan Guide


Order Wizard Search (12 items found)

Order Wizard Search



Selections: ☒ 2017 ☒ 2017 Aetna MA ☒ Keystone (DE, PA, WV) ☒ PA

View: Icons | Table | Text

Sort By: Item Description 


Show: 10 

Page: 1 2

Item Description	Your Item	Order
<b>KIT: 2017 AET PA-CENTRAL -</b>  COUNTIES: Adams, Allegheny, Armstrong, Beaver, Bedford, Berks, Blair, Bucks, Butler, Cambria, Cameron, Carbon, Centre, Chester, Clearfield, Clinton, Columbia, Crawford, Cumberland, Dauphin, Delaware, Elk, Erie, Fayette, Forest, Franklin, Fulton, Greene, Huntingdon, Indiana, Jefferson, Juniata, Lackawanna, Lancaster, Lawrence, Lebanon, Lehigh, Luzerne, Lycoming, McKean, Mercer, Mifflin, Monroe, Montgomery, Montour, Northampton, Northumberland, Perry, Philadelphia, Potter, Schuylkill, Snyder, Somerset, Sullivan, Susquehanna, Union, Venango, Warren, Washington, Wayne, Westmoreland, Wyoming, York  H3931-091 Aetna Medicare PinnacleHealth Prime Plan (HMO) H3931-070 Aetna Medicare Standard Plan (HMO) H5521-122 Aetna Medicare Gold Plan (PPO) H3931-112 Aetna Medicare Choice Plan (HMO) H5521-012 Aetna Medicare Premier Plan (PPO)	010-17-PA-CENTRAL	
<b>KIT: 2017 AET PA-SOUTHEASTERN -</b>  COUNTIES: Bucks, Chester, Delaware, Montgomery, Philadelphia	010-17-PA-SOUTHEASTERN	

## Place Order – Ordering Preferences

A pop up will confirm the item has been added to the Cart. You can choose to go directly to the Shopping Cart by clicking the **View Cart** button. To order additional items click **Stay Here**. If you click the “**Save Choice as Preference**” box your selection will be saved and the next time you add an item to the cart the system will perform that action and the pop up will no longer display.



### Item Added to Cart

The Item "KIT: 2017 AET PA-CENTRAL -

COUNTIES: Adams, Allegheny, Armstrong, Beaver, Bedford, Berks, Blair, Bucks, Butler, Cambria, Cameron, Carbon, Centre, Chester, Clearfield, Clinton, Columbia, Crawford, Cumberland, Dauphin, Delaware, Elk, Erie, Fayette, Forest, Franklin, Fulton, Greene, Huntingdon, Indiana, Jefferson, Juniata, Lackawanna, Lancaster, Lawrence, Lebanon, Lehigh, Luzerne, Lycoming, McKean, Mercer, Mifflin, Monroe, Montgomery, Montour, Northampton, Northumberland, Perry, Philadelphia, Potter, Schuylkill, Snyder, Somerset, Sullivan, Susquehanna, Union, Venango, Warren, Washington, Wayne, Westmoreland, Wyoming, York

H3931-091 Aetna Medicare PinnacleHealth Prime Plan (HMO) H3931-070 Aetna Medicare Standard Plan (HMO) H5521-122 Aetna Medicare Gold Plan (PPO) H3931-112 Aetna Medicare Choice Plan (HMO) H5521-012 Aetna Medicare Premier Plan (PPO)" has been added to your shopping cart and is now part of your order.

☐ Save Choice as Preference

[VIEW CART](#)

[STAY HERE](#)

## Place Order –Item Search Results continued


Shopping Basket Icon at the top of the page will display the number of items currently in the cart.

- To proceed with your order click the Shopping Basket Icon at the top of the page.
- To order additional items on this page, click the Shopping Basket Icon for that item.
- To order materials for a different Product, Market or State, click **Order Wizard Search** link



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Filter by Material Type

☐ Kit

☐ Formulary

☐ Plan Guide

Order Wizard Search (12 items found)

Selections: ☒ 2017 ☒ 2017 Aetna MA ☒ Keystone (DE, PA, WV) ☒ PA

View: Icons | Table | Text Sort By: Item Description  Show: 10  Page: 1 2

Item Description	Your Item	Order
<b>KIT: 2017 AET PA-CENTRAL -</b> COUNTIES: Adams, Allegheny, Armstrong, Beaver, Bedford, Berks, Blair, Bucks, Butler, Cambria, Cameron, Carbon, Centre, Chester, Clearfield, Clinton, Columbia, Crawford, Cumberland, Dauphin, Delaware, Elk, Erie, Fayette, Forest, Franklin, Fulton, Greene, Huntingdon, Indiana, Jefferson, Juniata, Lackawanna, Lancaster, Lawrence, Lebanon, Lehigh, Luzerne, Lycoming, McKean, Mercer, Mifflin, Monroe, Montgomery, Montour, Northampton, Northumberland, Perry, Philadelphia, Potter, Schuylkill, Snyder, Somerset, Sullivan, Susquehanna, Union, Venango, Warren, Washington, Wayne, Westmoreland, Wyoming, York H3931-091 Aetna Medicare PinnacleHealth Prime Plan (HMO) H3931-070 Aetna Medicare Standard Plan (HMO) H5521-122 Aetna Medicare Gold Plan (PPO) H3931-112 Aetna Medicare Choice Plan (HMO) H5521-012 Aetna Medicare Premier Plan (PPO)	010-17-PA-CENTRAL	
<b>KIT: 2017 AET PA-SOUTHEASTERN -</b> COUNTIES: Bucks, Chester, Delaware, Montgomery, Philadelphia	010-17-PA-SOUTHEASTERN	




## Place Order – Shopping Cart

In the Shopping Cart, to view the associated Plan Guide and Formulary for your kit(s), click the **Related Materials** link. In the pop up window, click the Shopping Basket to add any of the items to your order. When finished, enter the order quantity for each line item, then click **Update Cart**.



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 Cart **1**

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 Shopping Cart Contents (1 Item)

☐



Sorry,  
No Thumbnail  
Available

**KIT: 2017 AET MI-DETROIT AREA**  
**Your Item:** 010-17-MI-DETROIT  
**Units:** EA of 1   **Qty:**



 Remove Item

 Related Materials

UPDATE CART

Suggested Items

View: Icons | Table | Text   Sort By: Item Description    Show: 10    Page: 1

Item Description	Your Item	Suggested Because	Order
PLAN GUIDE: 2017 AET MI-DETROIT AREA	PGAET17-MI-DETROIT	Suggested Plan Guide for this kit.	
RX FORMULARY: 2017 AET B2 (17025A) - H5521-135; H5521-149; R6694-001; R6694-005	58.05.425.1	Suggested Formulary for this kit.	

CHECK OUT


## Place Order – Shopping Cart – Quantity Allocations

If the quantity entered exceeds your allocated amount for the time period, a message will be displayed indicating the quantity has been exceeded and that the order will route for review.

To proceed with the order, click Check Out.

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### Shopping Cart Contents (2 Items)


 For the Month ending 08/31/2016, you are allowed 15 of this item. Please provide justification for a quantity exception, e.g. date of your sales event(s), number of appointments currently scheduled. With this order, your usage would exceed the limit by 1.

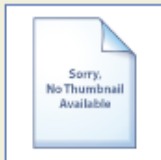


**KIT: 2017 AET PA-CENTRAL**  
**Your Item:** 010-17-PA-CENTRAL

**Units:** EA of 1   **Qty:**


 [Remove Item](#)

 For the Month ending 08/31/2016, you are allowed 5 of this item. Please provide justification for a quantity exception, e.g. date of your sales event(s), number of appointments currently scheduled. With this order, your usage would exceed the limit by 5.



**PLAN GUIDE: 2017 AET PA-CENTRAL**  
**Your Item:** PGAET17-PA-CENTRAL-1

**Units:** EA of 1   **Qty:**

 [Remove Item](#)

**UPDATE CART**

## Place Order – Delivery Options


On the Delivery Options page you may select an address from your personal address book, search for an address in your personal address book, or click Address Source and select Manually Enter Address to enter a new Ship to Address. When finished, click **Next**

**REMINDER:** Please be sure to use a full street address, including Suite number, if applicable. UPS will not deliver to a PO Box.



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### Delivery Options

Step 1 of 3

#### Address Source

Your Default Address

Your Default Address

Your Personal Address Book

Manually Enter Address

#### Addresses Found

 (1)

☒ Joe  
Broker, 1750 Wallace Avenue, RRD, Saint Charles, IL,  
60174 USA

#### Deliver To

Joe  
Broker  
1750 Wallace Avenue  
RRD  
Saint Charles, IL 60174  
USA

For Aetna Use Only

SAVE ORDER

CANCEL

BACK

NEXT

## Place Order – Manually Enter Ship to Address

If you select Manually Enter Address from the Address Source list, once the Ship to Address has been entered you may save that address and also mark it as the default for future visits.

**Warning:** Changing the Country from United States will remove the State field.



### Delivery Options

Step 1 of 3

#### Address Source

Manually Enter Address ▼

#### Enter Address Here

First Name

Last Name \*

Address Line 1 (Will not ship to PO Box) \*

Address Line 2 (Req'd for Apt or Suite)

Company Name

City \*

State \*

Select a Sta ▼

Zip \*

Country \*

United States ▼

Phone

For Aetna Use Only

**VALIDATE**

☐ Add to Address Book ☐ Is Default

Address



**SAVE ORDER**

**CANCEL**

## Place Order – Order Details

On the Order Details page, some or all of the information may be defaulted. Enter any missing information and click Next. Fields marked with an asterisk (\*) are required.

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### Order Details

Step 2 of 3

#### Customer Information

Name \*

Joe Broker

Phone Number \*

(999)999-9999

Email Address \*

joe.broker@aetna.com

#### Order Information

NPN # \*

900008

User First Name \*

Joe

User Last Name \*

Broker

[SAVE ORDER](#)

[CANCEL](#)

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## Place Order – Routing Justification (if applicable)

If the allocated amount has been exceeded for any items on the order, a Justification page will be shown. Please enter a message to support why that quantity is needed. When finished, click **Next**

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Cart **2**

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### Routing Justification

Step 2 of 3

#### Routing Details:

No.	Your Item	Routing Reason(s)
1	010-17-MI-DETROIT	1) For the Month ending 08/31/2016, you are allowed 10 of this item. With this order, your usage would exceed the limit by 10.
2	PGAET17-MI-DETROIT	1) For the Month ending 08/31/2016, you are allowed 5 of this item. With this order, your usage would exceed the limit by 5.

#### Justification

Please provide a justification to support the above reason(s) \*

These quantities are needed for a special project on 8/31

[SAVE ORDER](#)

[CANCEL](#)

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## Place Order – POD Booklet Customization

Enter up to two lines of personalized information to be printed on the kit. When finished, click **Next**

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### Customization Information



#### Contact Information

You can use these two lines (35 characters max length each) to customize the POD booklet with contact information. We have pre-populated the information based on your user profile. Please edit as needed before clicking Next.  
NOTE: information entered here applies to all booklets on your order.

Contact Information Line 1 (10/35)

Joe Broker

Contact Information Line 2 (13/35)

(999)999-9999

[SAVE ORDER](#)

[Checkout Options](#) ▾


[CANCEL](#)



[BACK](#)

[NEXT](#)


## Place Order – POD Booklet Customization - Confirmation

Confirm the customized information for the kit. When finished, click **Next**


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### Confirm Imprint

2. Confirm Imprint 

#### Contact Information

PLEASE REVIEW AND CONFIRM THE INFORMATION YOU ENTERED. You will not see an online proof of this information, but confirm it is correct before it is used to customize the POD booklet.

**Contact Information Line 1** (10/35)

**Contact Information Line 2** (13/35)

[SAVE ORDER](#) | [Checkout Options ▼](#) | [CANCEL](#) | 2. Confirm Imprint ▼ | [BACK](#) | [NEXT](#)



## Place Order – Order Summary

On the Order Summary Page, confirm all information is correct and click **Submit Order**

**Note:** Be sure to double check the Ship to Address to prevent delays in receiving your order.

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### Order Summary

Step 3 of 3

**Ships To:** Joe

1750 Wallace Avenue  
Saint Charles, IL 60174

[View or Print All Details](#) | [Show Order Detail](#)

### Items Ordered



**KIT: 2017 AET PA-CENTRAL**

**Your Item:** 010-17-PA-CENTRAL

**Units:** EA of 1    **Quantity:** 1

SAVE ORDER

CANCEL

BACK

SUBMIT ORDER

## Place Order – Order Confirmation

Sales Reference Number will be displayed. This number can be used in Order Search to view the Order Details, Status of the Order and Tracking information once the order ships.

Click **Home** to return to the home page to enter additional orders or check Order Status.  
If finished, click **Return to Portal** link at the top of the page.

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Order Confirmed

Sales Reference Number: 42027495

Thank you. We will send a detailed email confirmation to joe.broker@aetna.com. Please save the above Sales Reference Number, it can be used to track your order in our order status module. You may also wish to [Print this Order Confirmation](#) for your records.  
Thank you for your business!

HOME

## Menu Bar - Orders

- Order Search to check the status of an order
- Saved Orders to complete or cancel a saved order not yet submitted
- Copy Recent Orders to copy an order that has been submitted
- Pending orders to View/Modify/Cancel orders that have been submitted but not yet processed

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[Item Updates](#)  
[Formularies](#)  
Formularies are now available

[Order Search](#)  
[Saved Orders](#)  
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[Item Updates | Welcome](#)  
10/01/2015

 **Order Status FAQ**  
The order search feature has been enhanced. It now provides the shipping status and UPS tracking information for each item ordered. For more information regarding this feature select the "Help" button, then "Help with this page" and go to page 19 of the Guide.

[Medicare Broker Materials 2017](#)

## Orders - Order Search - Recent Order Display

When the Order Search screen opens, a list of recent orders and their status are displayed.

To View the Order Details, click the Sales Reference Number Link in the first column.

To View the Shipment Status and Tracking Number, click the Icon in the Order Status Column

### Order Search

<b>Search</b>	<b>For</b>	<b>Date Range</b>	<b>Scope</b>	<b>SEARCH</b>
Sales Ref No. ▼	<input type="text"/>	07/27/2016  - 08/26/2016	My Orders ▼	

### Recent Orders *(50 orders found)*

Columns: Custom Columns(1)

Sort By: Order Date

Show: 10

Page: 1 ... 3 4 5

Sales Ref No.	Order Date	Order Status	Item No.	Action
41923926	08/22/2016	Shipped		Select...
41908713	08/19/2016	Shipped		Select...
41899259	08/19/2016	Shipped		Select...
41898894	08/19/2016	Processing		Select...
41898823	08/19/2016	Processing		Select...
41898641	08/19/2016	Shipped		Select...
41875990	08/18/2016	Shipped		Select...
41875589	08/18/2016	Shipped		Select...
41875122	08/18/2016	Shipped		Select...
41874963	08/18/2016	Shipped		Select...

## Orders - Order Search – Recent Orders – Action Menu Options

To access the Order Actions menu, click the Select Link or Icon in the Action Column

- View Order Details takes you to all of the details for the order. To return to the Recent Order list, click the “Back to Results” link in the top right corner of the order details page.
- View Order Summary opens in a new window and displays a printable version of the order. To return to the recent order list, close the new tab.
- View Shipments opens the Shipment and Tracking Number pop up. To return to the Recent Order list, close the pop up












### Order Search

Search **For** **Date Range** **Scope**

Sales Ref No.  07/27/2016 - 08/26/2016 My Orders

### Recent Orders (50 orders found)

Columns: Custom Columns(1) Sort By: Order Date Show: 10 Page: 1 ... 3 4 5

Sales Ref No.	Order Date	Order Status	Item No.	Action
41923926	08/22/2016	Shipped 		Select... 
41908713	08/19/2016	Shipped 		View Order Details View Order Summary View Shipments 
41899259	08/19/2016	Shipped 		Select... 
41898894	08/19/2016	Processing		Select... 
41898823	08/19/2016	Processing		Select... 
41898641	08/19/2016	Shipped 		Select... 

## Orders - Order Search – View Order Details

Order Details shows Order Information, Routing Information (if applicable), Item Information, Shipping and Tracking Information. Clicking on the Tracking Number will open the UPS tracking page in a new window. Click Back to Results link to return to the recent orders list.

### Order Details for Sales Reference No. 42027495

[Actions...](#)  [Back to Results](#)

#### Order Information

[Expand All](#)

**Order Status:** Pending  
**Order No.:** N/A  
**Sales Reference No.:** 42027495  
**Purchase Order #:** 42027495  
**Order Date:** 08/26/2016  
**NPN #:** 900008  
**User First Name:** Joe  
**User Last Name:** Broker

#### Billing Information

**Bill Method:** Not Applicable

#### Customer and Address Information

**Name:** Joe Broker  
**Phone No.:** (999)999-9999  
**Email:** joe.broker@aetna.com  
**Ship To:** Joe  
Broker  
1750 Wallace Avenue  
RRD  
Saint Charles, IL, 60174  
USA

### Items Ordered

[Expand All](#)

Line No.	Item Description	Your Item	Status	Unit	Qty	Shipped
▶ 0001	2016 CVH MAPD Stormont Vail Total Care	KIT-16-KS-STORMONT VAIL	Shipped	EA/1	1	Yes

### Shipping and Tracking Information

[Expand All](#)

Ship No.	Warehouse	Ship Date	Status	Carrier/Service	Tracking No.
▶ 0001		08/23/2016	Shipped	UPS / N/A	1Z70V9780320376875

## Orders - Order Search – View Order Summary

Opens in a new tab and displays a printable version of the order. To return to the list of recent orders, close the tab.

[PRINT](#)

### Order Confirmed

Sales Reference Number: 42027495

#### Customer Information

**Name**

Joe Broker

**Phone Number**

(999)999-9999

**Email Address**

joe.broker@aetna.com

#### Billing Information

**Billing Method**

Not Applicable

#### Shipping Information

**Ships To**

Joe  
Broker  
1750 Wallace Avenue  
RRD  
Saint Charles, IL 60174  
USA

#### Order Information

**Purchase Order #**

42027495

**NPN #**

900008

**User First Name**

Joe

**User Last Name**

Broker

#### Order Questions

**Contact Information Line 1**

Joe Broker

**Contact Information Line 2**

(999)999-9999

**Contact Information Line 1**

Joe Broker

**Contact Information Line 2**

(999)999-9999


## Orders - Order Search – View Shipments

Displays the Shipment(s) and Tracking Number information. Clicking the tracking number will open the UPS Tracking Site in a new window. To return to the list of recent orders, close the pop up window.



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Sign Out

 Cart 0

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ORDERS

### Order Search

Search

For

Sales Ref No. ▾

Expand All

SEARCH

► 0001. UPS (N/A)

1Z0000000000000

► 0002. UPS (N/A)

1Z00000000000001

### Recent Orders (12)

Columns: Custom Columns

Page: 1 2

Sales Ref No.	Order Date	Order Status	Action
70255637	12/01/2015	Mixed	Select... 




## Orders - Order Search – Search Options

Within Order Search, there is also a list of fields that can be used to search for specific orders. Select the “Search By” from the drop down and enter the data for that option in the “For” field, then click the Search Button.

Searches can also be performed using the Date Range feature.

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### Order Search


**Search**



**For**

**Date Range**

**Scope**

**SEARCH**

Sales Ref No. 

07/20/2016  - 08/19/2016 

My Orders ▼

Invoice No.

Item No.

NPN #

Order No.

Order Status

Purchase Order #

Routing No.

Sales Ref No.

Ship To Country

Ship To State/Province

Ship To Zip/Postal Code

User First Name

User Last Name

Results found)


## Orders - Saved Orders

- Continue Order by clicking the Shopping Basket icon for the order
- Delete a saved order by clicking the check box to the right of the Order Name(s) and click the Delete Selected Button



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 Saved Orders

<input type="checkbox"/>	Order Name	Date and Time	Saved By	Items	Continue Order
<input type="checkbox"/>	My Saved Order	08/19/2016 05:13 PM	BROKERTRAIN	1	

DELETE SELECTED

## Orders - Pending Orders- Actions


- Modify Order – Puts the order to the shopping cart so changes can be made.
- Cancel Order – Cancels the Order and its immediately removed from the list
- Order Details – Displays the Details of the order

**NOTE:** If an order routed for review and was approved, it cannot be modified.



Welcome, Missy Bottcher

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Return to Broker Portal

 Cart 0

Help ?

  
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ORDERS

Sort By: Date Submitted  Show: 10  Page: 1Sort By: Date Submitted  Show: 10 

# My Profile

- Personal Address Book - Add, modify or delete Ship to Addresses
- Settings and Preferences - View or change Shopping and Catalog Search Preferences

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**My Profile**

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 Cart 0

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Personal Address Book

Settings & Preferences

  
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## Item Updates

Item Updates | Welcome

### Formularies

Formularies are now available for ordering.

Did you know that our formularies now list applicable Contract PBPs on the back cover? And we also include Contract PBP information inside our Enrollments Kits by product offerings. You can use this information to easily crosswalk formularies to enrollment kits.


10/01/2015




### Order Status FAQ

The order search feature has been enhanced. It now provides the shipping status and UPS tracking information for each item ordered. For more information regarding this feature select the "Help" button.

## My Profile - Settings and Preferences

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### Preferences

#### Shopping

**Express Shopping**  

ON - Stay On Page ▼

#### Catalog and Search Results

**Default Sort By**  

Item Description ▼

**Default Display As**  

Text View - No Thumbnail ▼

**Default # of Items**  

10 ▼

#### Custom Documents/Order Entry

**Prompt for Saving UI Pages**  

Yes - Always Prompt To Save ▼

CANCEL

SAVE