



# **Your Step Action Guide for Ordering WellCare Sales Materials Plan Year 2020**

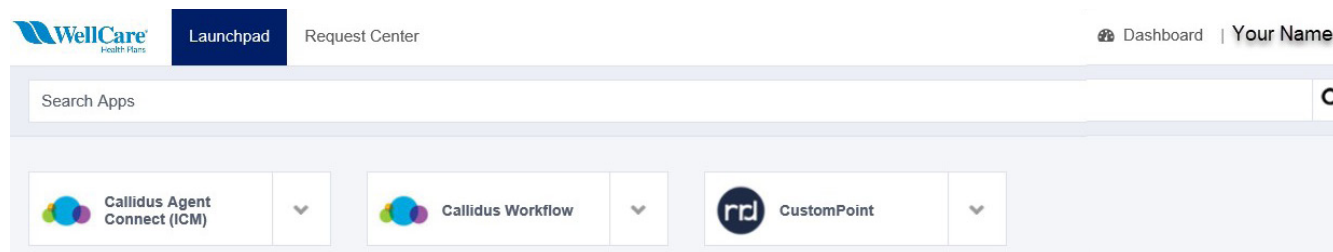
Last Updated September 2019



# Materials Ordering Guide

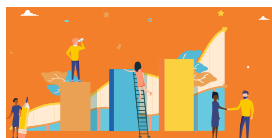


Accessing the CustomPoint Materials Portal is easy! From your WellCare single sign-on portal homepage, select the CustomPoint icon to be automatically routed to the materials portal within a new browser window.



\*CustomPoint is available 24 hours after all 2020 certification requirements are complete.

**Helpful Tip!** For assistance setting up and/or accessing your single sign-on portal, please reference the Agent Single Sign-On Portal Account Setup Guide located on the WellCare Agent Resource Center.



# Materials Ordering Guide




**NOTE:** After logging into Custom Point from your single sign-on dashboard, you will be directed to the Materials Portal homepage. The homepage serves as a point of communication of news, FAQs and messages about the site, as well as a dashboard of recent activity, including the last 7 orders placed.

[Welcome, Missy Broker Bottcher](#) [My Profile](#) [Sign Out](#)  **Cart 0** [Help ?](#) **CustomPoint 8.0®**

 Welcome to CustomPoint™ powered by B&B Software

[HOME](#) [ORDERS](#)



A few simple steps to place your orders:  
1. Use Guided Search; Add desired materials to the cart  
2. Specify the desired quantity, view the price and Checkout  
3. Select or set the shipping location  
4. Enter contact info  
5. Submit your order

### Guided Search

Plan Year?  
2020

What product?  

Please make a selection

### Order Search

[Show All Orders](#)

Sales Ref No.	Order #	Order Date	Order Status	Action
55328014	N/A	08/06/2010	Denied	Select 

**23 October Forecast Schedule**

Market Forecast Ordering for CCP and PDP materials will run from **July 8 through July 12, 2019!**

**Helpful Documents**

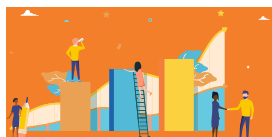
Important reference documents found here:  
[User Guide](#)

[2020 AEP Crosswalks](#)

**Order Reminders**

Here are your saved or pending orders awaiting completion:  
Saved Orders (0)


**NOTE:** When using the system, use only the navigation options provided within the screens. Using your browser back and forward, and even potentially, reload buttons can cause confusion with the ordering session that is being tracked by the system, so this should be avoided.





# Materials Ordering Guide




**STEP 1:** Under Guided Search, select the dropdown menu and choose the product you would like to order materials for, CCP or PDP.

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[HOME](#) [ORDERS](#)



A few simple steps to place your orders:  
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3. Select or set the shipping location  
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5. Submit your order


### Guided Search


Plan Year?  
2020


What product?  
Please make a selection  
Please make a selection  
CCP (Producers)  
PDP (Producers)

### Order Search

3RS

 **23 Forecast Schedule**  
Market Forecast Ordering for CCP and PDP materials will run from July 8 through July 12, 2019!

 **Helpful Documents**  
Important reference documents found here:  
[User Guide](#)  
[2020 AEP Crosswalks](#)

 **Order Reminders**  
Here are your saved or pending orders awaiting completion:  
Saved Orders (0)

## Guided Search

Plan Year?  
2020

What product?

Please make a selection

Please make a selection



# Materials Ordering Guide



**STEP 2:** Select the Market you would like to order materials for underneath Plan Year (only Markets you are certified in will populate). Once the market is selected, press the find button.

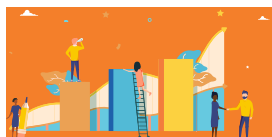
- For this example, we will use the FLE market

A screenshot of the WellCare website's 'Order Wizard Search' interface. The 'Plan Year?' dropdown is set to '2020' and the 'What market?' dropdown is set to 'FLE'. A 'FIND' button is visible. A callout box highlights the 'Plan Year? 2020' and 'What market? FLE' fields with a 'FIND' button. The page also shows a 'Training Schedule' for June 26-28, 2019, and 'Order Reminders' for saved and pending orders.

**STEP 3:** Use filters on the left side of the screen to help define your search. Select each material you would like to order by clicking on the 🛒 icon next to that item in the order column. When the item is in your cart, the icon will change to 📦.

A screenshot of the WellCare website's 'Order Wizard Search' interface. The 'State/Region' filter is set to 'AZ'. The 'Media Type?' filter is set to 'DIR'. The 'Language?' filter is set to 'ENG'. The search results table shows 19 items found. The 'Order' column contains icons for each item, which are currently 🛒 (shopping cart) icons. The table has columns for 'Item Description', 'Your Item', 'Media Type', and 'Order'.

Item Description	Your Item	Media Type	Order
AZ DIR V83 MAPD Maricopa, Pima, Pinal, Yavapai MLT	AZ0AORDIR39720M_0083	DIR	🛒
AZ 2020 Resource Bundle WellCare Compass HMO/ Dividend HMO/ Value HMO ENG	AZ0AORKIT37491E_0007	KIT	🛒
AZ 2020 Resource Bundle WellCare Compass HMO/ Dividend HMO/ Value HMO SPA	AZ0AORKIT38513S_0007	KIT	🛒
AZ DIR V84 DSNP Gila, Maricopa, Pinal MLT	AZ0AZRDIR39725M_0084	DIR	🛒
AZ DIR V126 DSNP Apache, Coconino, Mohave, Navajo, Yavapai MLT	AZ0AZRDIR39726M_0126	DIR	🛒
AZ 2020 Resource Bundle WellCare Liberty HMO D-SNP ENG	AZ0AZRKIT37490E_0006	KIT	🛒



# Materials Ordering Guide



**STEP 4:** In order to locate the counties that are included in the plan(s) for this material, please click below the thumbnail on “Show full size image”.

The screenshot shows the WellCare CustomPoint 8.0 user interface. At the top, there's a navigation bar with 'Welcome, Missy Broker Bottcher', 'My Profile', 'Sign Out', 'Cart', 'Help', and 'CustomPoint 8.0'. Below this is the WellCare logo and a 'HOME ORDERS' tab. The main content area displays 'Back To Results: AZ 2020 Resource Bundle WellCare Compass HMO/ Dividend HMO/ Value HMO ENG'. It lists 'Your Item: AZ0AORKIT37491E\_0007' and 'Used: 0 of 10 (Until 12/31/2019)'. A 'Kit Contents' section lists: 1 Resource Guide (AZ0AORRGD37491E\_0007), 2 Enrollment Application (NA0WCMA36286E\_0000), 2 BRE (NA0WCMEHV34456E\_0000), and 1 HRA (NA0HRAKITE). Below this is a form with 'Units: EA of 1' and a 'Quantity' input field, followed by an 'ADD TO CART' button. A thumbnail image of the resource guide is shown on the left, with a red circle around the 'Show Full Size Image' link at the bottom. A 'Categories' sidebar on the right shows '2020 CCP'. At the bottom, there's a copyright notice for RR Donnelley &amp; Sons Company and links for 'Privacy Policy' and 'Cookie Policy'.

**NOTE:** When placing orders, input and submit orders for CCP Materials separate from PDP Material orders. CCP and PDP Materials cannot be combined into one order.

**Resource Guide Kit Name:**  
AZ0AORKIT37491E\_0007

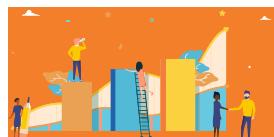
**Plan Type:**  
HMO

**Counties:**

**WellCare Value (HMO) Arizona**  
Maricopa, Pima, Pinal, Yavapai

**WellCare Compass (HMO) Arizona**  
Maricopa, Pima, Pinal, Yavapai

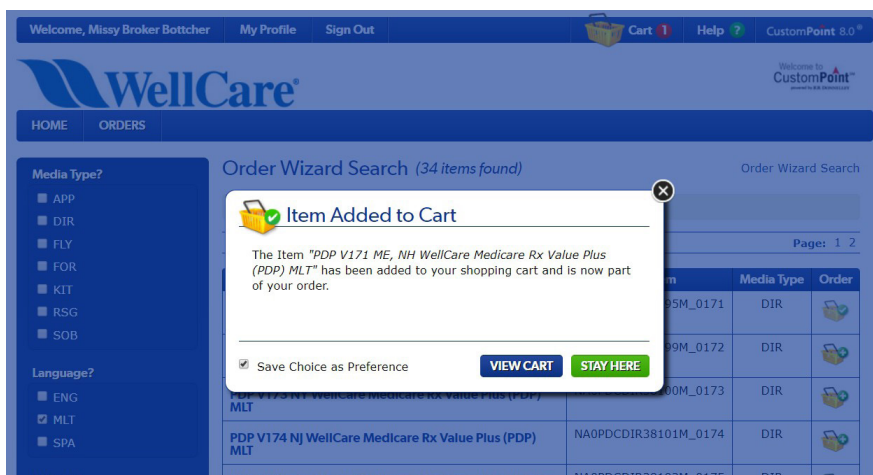
**WellCare Dividend (HMO) Arizona**  
Maricopa, Pima, Pinal, Yavapai



# Materials Ordering Guide



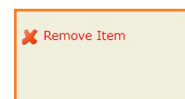
**NOTE:** The first time you add an item to the cart, you will be asked to set a preference for staying on the ordering page, or going to the shopping cart.



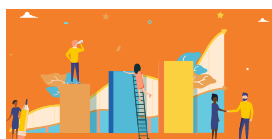
**NOTE:** If you need to order MA and PDP materials, you must place them as separate orders (for tracking purposes).

**STEP 5:** In the shopping cart, enter the desired quantity for each item

- If you no longer need that item in the order, click “Remove Item”
- If the quantity exceeds the allocation for that material, a warning message will be displayed indicating the order will route for approval



For the Year ending 12/31/2019, you are allowed 3 of this item. With this order, your usage would exceed the limit by 7. This order will route for review.







# Materials Ordering Guide





**NOTE:** From the cart, you can Save Order (to resume later), Continue Shopping (to go back and look for other items to put in the cart), or Check Out (to proceed with shipping information and submit for approval). These three selections are located on the bottom of the webpage.


[Welcome, Missy Broker Bottcher](#) [My Profile](#) [Sign Out](#)  **Cart 2** [Help ?](#) [CustomPoint 8.0®](#)

 [Welcome to CustomPoint™](#)  
powered by R.R. DONNELLEY

[HOME](#) [ORDERS](#)


 **Shopping Cart Contents (2 Items)**

 For the Year ending 12/31/2019, you are allowed 3 of this item. With this order, your usage would exceed the limit by 7. This order will route for review.

☐  **PDP V171 ME, NH WellCare Medicare Rx Value Plus (PDP) MLT**  
**Your Item:** NA0PDCDIR37895M\_0171

[Remove Item](#)

**Units:** EA of 1 **Qty:**

☐  **PDP V103 ME, NH WellCare Medicare Rx Select (PDP) MLT**  
**Your Item:** NA0PDADIR37893M\_0103

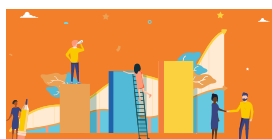
[Remove Item](#)

**Units:** EA of 1 **Qty:**

[UPDATE CART](#)

[SAVE ORDER](#) [More Cart Options](#) [CONTINUE SHOPPING](#) [CHECK OUT](#)

[SAVE ORDER](#) [More Cart Options](#) [CONTINUE SHOPPING](#) [CHECK OUT](#)





# Materials Ordering Guide



**NOTE:** If you choose to Save Order along the way (from shopping cart on), you will be asked to give the order a name, and then click “Save”. To resume a Saved Order, access through the Orders menu bar located underneath the WellCare logo, or the alert/reminder link on the right side of the Home page.

Welcome, Missy Broker Bottcher

My Profile

Sign Out

Cart 2

Help ?

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WellCare®

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HOMEORDERS

Saved Order Details

Order Name: \*

Broker Saved Order

SAVE

Ship To Address:  
Not Yet Provided

No.	Item Description	Your Item	Units	Qty Ordered
1	PDP V171 ME, NH WellCare Medicare Rx Value Plus (PDP) MLT	NA0PDCDIR37895M_0171	EA of 1	10
2	PDP V103 ME, NH WellCare Medicare Rx Select (PDP) MLT	NA0PDADIR37893M_0103	EA of 1	1

CANCEL

HOMEORDERS

S

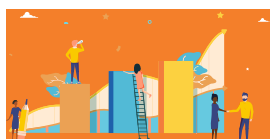
Order Search

Saved Orders

Order Reminders

Here are your saved or pending orders awaiting completion:

[Saved Orders \(1\)](#)



# Materials Ordering Guide



**STEP 6:** When you click “Check Out”, a new webpage with the Delivery Options screen will appear with the address of the location you want the materials sent to. You can add a Ship to Attention field if needed. After every field has been filled out, click the green NEXT button.

**NOTE:** If necessary, you can change the address source and manually enter an address. Any address will be checked for deliverability with a call to a USPS web service. If you manually enter an address, you can NOT enter a PO Box.

Welcome, Frank Captive Mega

My Profile

Sign Out

Cart 2

Help ?

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WellCare®

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HOMEORDERS

Delivery OptionsStep 1 of 3

Address Source

Your Personal Address Book

Search Personal Address Book

Search

Select One

For

SEARCH

More Search Options

Addresses Found (1)

Frank Captive Mega

100 N. Tampa Street, Suite 2175, Tampa, FL, 33602 USA

Deliver To

Frank Captive Mega

100 N. Tampa Street

Suite 2175

Tampa, FL 33602

USA

Modify

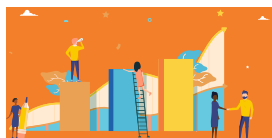
Ship To Attention

SAVE ORDER

CANCEL

BACK

NEXT



# Materials Ordering Guide



**STEP 7:** Review your contact information and make sure your full name, phone number and email address are correct (the email address entered will receive an order confirmation email once the order has passed the approval stage). Once you have verified your information, click the green NEXT button.

A screenshot of the 'Order Details' page in the WellCare system. The page shows a form for 'Customer Information' with fields for Name, Phone Number, and Email Address. The 'Name' field contains 'Broker Name', 'Phone Number' contains '999-999-9999', and 'Email Address' contains 'broker@gmail.com'. There are 'SAVE ORDER', 'CANCEL', 'BACK', and 'NEXT' buttons at the bottom. The page is marked as 'Step 2 of 3'.

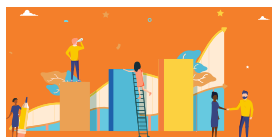
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**STEP 8:** If the allocation was exceeded for any of the items ordered, a Routing Justification webpage will appear. In the Justification text box, type a note to the approver at your local WellCare office explaining the quantity need. Once you have provided your justification, press the green NEXT button.

**NOTE:** This screen will not appear if you haven't exceeded the allocation.

A screenshot of the 'Routing Justification' page in the WellCare system. The page shows a table with 'Line No.', 'Your Item', and 'Routing Reason(s)'. The first row shows '1' for 'NAOPDADIR38032M\_0105' with a reason about exceeding a limit. Below the table is a 'Justification' section with a text box for providing a justification. There are 'SAVE ORDER', 'CANCEL', 'BACK', and 'NEXT' buttons at the bottom. The page is marked as 'Step 2 of 3'.

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A close-up of the 'Justification' text box from the previous screenshot. It contains the text 'Please provide a justification to support the above reason(s) \*' and 'Visiting some large clients in a few weeks'.

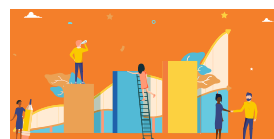
# Materials Ordering Guide



**STEP 9:** The Order Summary screen recaps where the order is shipping to and what was ordered. There are links to save the order, submit the order or review a printable summary of the order. If you are ready to submit your order, press the green NEXT button.

A screenshot of the WellCare website's Order Summary page. The header includes a navigation bar with 'Welcome, Frank Captive Mega', 'My Profile', 'Sign Out', a shopping cart icon with '2' items, a 'Help' link, and 'CustomPoint 8.0'. Below the header is a blue bar with 'HOME' and 'ORDERS' tabs. The main content area is titled 'Order Summary' with a 'Step 3 of 3' indicator. It shows shipping information: 'Ships To: Frank Captive Mega, 100 N. Tampa Street, Suite 2175, Tampa, FL 33602'. There are links for 'View or Print All Details' and 'Show Order Detail'. Under 'Items Ordered', there are two items: 'PDP V105 NY WellCare Medicare Rx Select (PDP) MLT' with quantity 15, and 'PDP V103 ME, NH WellCare Medicare Rx Select (PDP) MLT' with quantity 1. At the bottom are buttons for 'SAVE ORDER', 'CANCEL', 'BACK', and 'SUBMIT ORDER'.

**NOTE:** If you select SUBMIT ORDER, a Confirmation screen will appear with “Order Routed” and a sales reference number. The order will be put into a queue to be reviewed by the Market Leader. You will not receive an email notification about the order until after the order is approved as is, approved with edits, or denied.

A screenshot of the WellCare website's Confirmation screen. The header is identical to the previous screen. Below the header is a blue bar with 'HOME' and 'ORDERS' tabs. The main content area shows a confirmation message: 'Thank you. Your order has been routed for approval. An email will be sent to you once the order has passed approval and is submitted for processing. 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!'. There is a 'Sales Reference Number: 55330466'. At the bottom are buttons for 'COPY THIS ORDER' and 'HOME'. A footer contains copyright information: '© 2007 - 2019 RR Donnelley & Sons Company. All Rights Reserved. RR Donnelley, RRD, RRD (Stylized) and CustomPoint are trademarks or registered trademarks of RR Donnelley & Sons Company. CustomPoint version 8.2.18.' and the 'rd' logo.

# Materials Ordering Guide



For general support and any questions related to Agent contracting, certifications, training, commissions or assistance on placing materials orders, please contact the general Broker Support line at **1-866-822-1339**.

The support team will triage all questions and determine if the issue is related to a technical issue with CustomPoint. If so, then a phone number and email will be provided to contact regarding the issue.

