

CustomPoint User Guide

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CustomPoint - Materials Ordering

Select one of the following topics:

[How to Place an Order](#) – The Complete Process

Tips and Tricks

Ordering Portal

- [Filtering Materials](#)
- [Changing Item View](#)
- [Adding Items to Cart](#)

Checkout

- [Saving an Order](#)
- [Removing Items](#)

Changing or Adding an Address

Additional Order Information

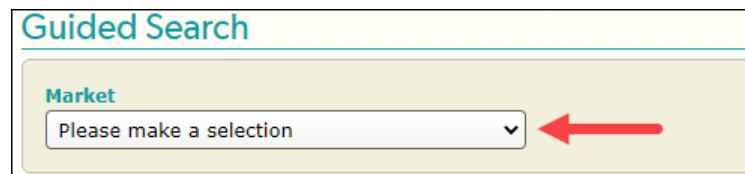
- [Searching for an Order](#)
- [Tracking Information](#)
- [Reordering a Previously Placed Order](#)

CustomPoint can be accessed from your Single Sign-On portal.

How to Place an Order – The Complete Process – [Click to return to menu](#)

- 1) From the home page, select the Market/State from the **Guided Search** dropdown.

Note: Only the state(s) and health plans you are contracted and certified to market and sell plus PDP will populate.



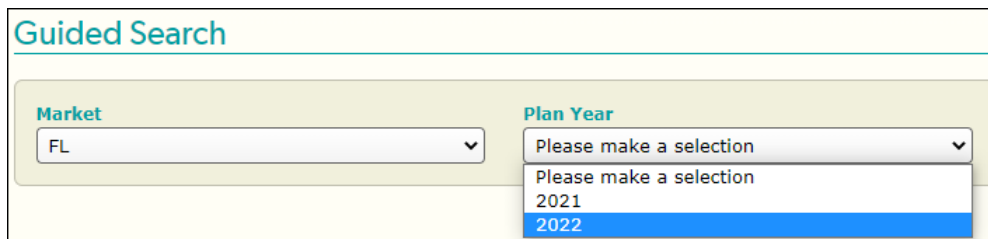
The screenshot shows a web interface element titled "Guided Search" in a teal header. Below the header is a light yellow box containing a dropdown menu. The dropdown is labeled "Market" in teal text. The menu is currently open, showing the text "Please make a selection" in a light gray box, followed by a small downward arrow icon. A red arrow points to the dropdown menu.

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- 2) Select the appropriate plan year from the **Plan Year** dropdown.

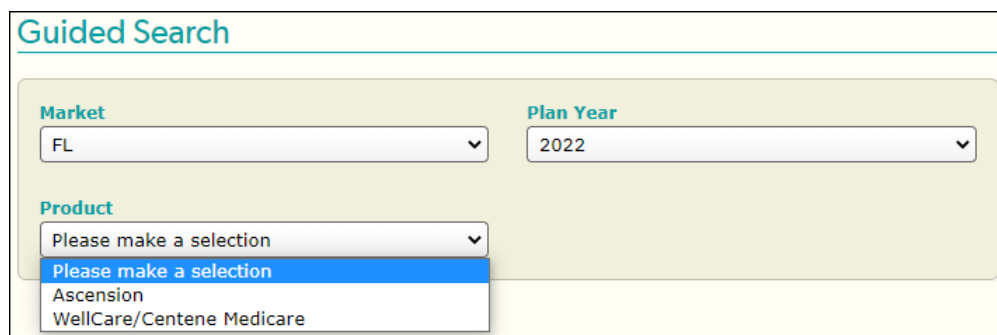
Note, if a market is available for 2022, there will be an option to order 2022 materials up until 12/31/2022. Reminder: You must complete 2023 contracting and certification training (2023 AHIP & ACT) in order to access 2023 materials.



The screenshot shows a 'Guided Search' form with two dropdown menus. The 'Market' dropdown is set to 'FL'. The 'Plan Year' dropdown is open, showing options 'Please make a selection', '2021', and '2022'. The '2022' option is highlighted in blue.

To order PDP materials, Select **PDP** in the **Market** dropdown.

- 3) Select a product from the Product dropdown. This year we will be offering up to 3 products in CustomPoint (This is market/state-dependent).



The screenshot shows the 'Guided Search' form with three dropdown menus. 'Market' is 'FL' and 'Plan Year' is '2022'. The 'Product' dropdown is open, showing options 'Please make a selection', 'Please make a selection', 'Ascension', and 'WellCare/Centene Medicare'. The first 'Please make a selection' option is highlighted in blue.

Complete Product List:

- Wellcare Centene Medicare (includes all Allwell, Health Net, and Fidelis)
- Ascension Complete
- PDP

- 4) Once you have selected the market, plan year, and product, select **FIND**. You will be taken to the ordering portal.

FIND

- 5) While in the ordering portal, add materials to your cart. Please refer to **Tips and Tricks, Ordering Portal** portion of this guide for more information on the different ways to filter and add materials to your cart.

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6) Once all items are in your cart, select the **Cart** icon to proceed with check out.



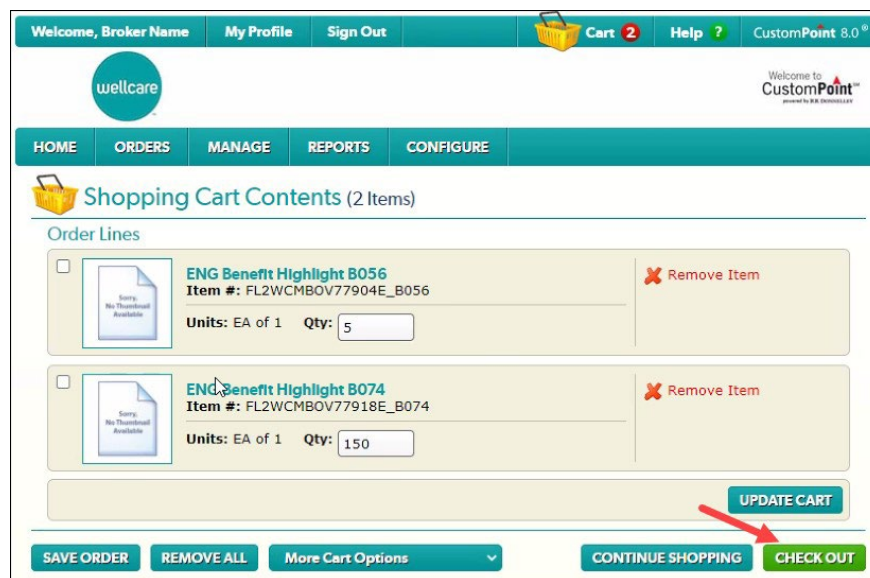
7) On the **Shopping Cart Contents** page of check out, you can do the following:

- Remove items
- Update quantities
- Save your order to complete at a later date
- Continue Shopping

(More information can be found on the **Tips and Tricks, Check-Out** portion of this guide).

When you are satisfied with the items in your cart, select the **CHECKOUT** button.

Note: Quantity number is required for each material item in your cart in order to check out.



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- 8) After selecting **CHECKOUT**, complete the **Delivery Options**. Here you can select a pre-populated shipping address or insert a new shipping address. After an address is selected and validated, select the **NEXT** button.

Wellcome, Broker Name | My Profile | Sign Out | Cart 2 | Help ? | CustomPoint 8.0[®]

HOME | ORDERS | MANAGE | REPORTS | CONFIGURE

Delivery Options Step 1 of 3

Address Source: Your Default Address

Addresses Found (1): Broker Name

Deliver To: Broker Name, Ship To Attention: Broker Name

SAVE ORDER | CANCEL | BACK | NEXT

Please refer to the **Tips and Tricks, Check-Out** portion of this guide for more information.

- 9) On the **Order Details** screen, a phone number and email address must be input to check out. An order confirmation, along with any order updates, will be sent to the email address entered. Select **NEXT** to continue to checkout.

Wellcome, Broker Name | My Profile | Sign Out | Cart 2 | Help ? | CustomPoint 8.0[®]

HOME | ORDERS | MANAGE | REPORTS | CONFIGURE

Order Details Step 2 of 3

Customer Information

Name *: Broker Name | Phone Number *: 9157270556 | Email Address *: SM_ICS_Forecasting@wellcare.com

Order Information

Order Title

Purchase Order # *: DTC ORDER

GL Code *: FL WellCare/Centene Medicare

Plan Year *: 2022

Product *: WellCare/Centene Medicare

Market *: FL

SAVE ORDER | CANCEL | BACK | NEXT

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10) If an order quantity exceeds the maximum, you will be asked for a **Routing Justification**. Please enter a note here, as the order will be forwarded to a market leader for review and approval.

Select **NEXT** to proceed to checkout.

Routing Justification Step 2 of 3

Line No.	Item #	Routing Reason(s)
Entire Order		1) Quantity Ordered for Item exceeds the Quantity Limit of 25 -FL1WMRRGD581245_0044 FL 2021 Resource Guide Version: 0044 SPA

Justification

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

SAVE ORDER CANCEL BACK NEXT

11) The Order Summary provides a final opportunity to review your order before submitting.

Final Review:

- Confirm **Items Ordered** and amount
- Confirm the **Ship To:** address

After a final check is completed, select **SUBMIT ORDER**.

Order Summary Step 3 of 3

Ships To: Broker Name 3

Ship To Attention:

View or Print All Details | Show Order Detail

Items Ordered

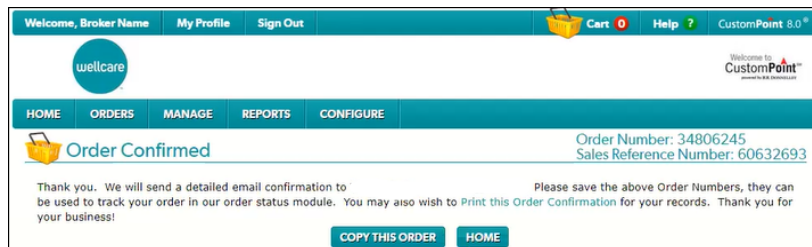
ENG Benefit Highlight B056 Item #: FL2WCMBOV77904E_B056 Units: EA of 1 Quantity: 5
ENG Benefit Highlight B074 Item #: FL2WCMBOV77918E_B074 Units: EA of 1 Quantity: 150

SAVE ORDER CANCEL BACK SUBMIT ORDER

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- 12) After an order is submitted you will receive an order confirmation page. If your order was routed, you will receive a confirmation email once the order has been approved. Please take note of the sales reference number. This will be needed to search for an order. At this point, you can return to the Home page to place another order, or copy the same order.



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Tips and Tricks – Click to return to menu

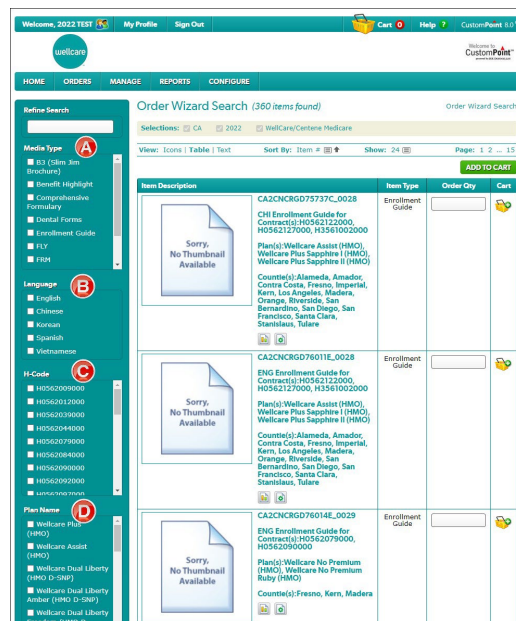
Below are a few tips and tricks to make the ordering process a more user-friendly experience.

Ordering Portal – Click to return to menu

This is where all of your available materials are located.

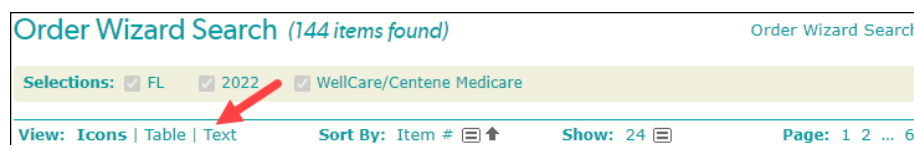
Filtering Materials – Click to return to menu

You can filter materials by using the check box options for **A.** Media Type, **B.** Language, **C.** H/S-Code, (contract number), or **D.** Plan Name. You can type in a keyword in the search box and the items will filter down for you.



Changing Item View – Click to return to menu

By default, your item view will be in an Icon View. However, you can change it into two other views, both provide a more detailed description.



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- *Icons View* – will display the Icons larger of item cover page with a short item description.

Order Wizard Search (144 items found) Order Wizard Search

Selections: ☒ FL ☒ 2022 ☒ WellCare/Centene Medicare

View: **Icons** | Table | Text Sort By: Item # Show: 24 Page: 1 2 ... 6

FL2CNCRGD76050E_0 ... FL2CNCRGD76050E_0C Enrollment Guide	FL2CNCRGD76051E_0 ... FL2CNCRGD76051E_0C Enrollment Guide	FL2CNCRGD76521S_0 ... FL2CNCRGD76521S_0C Enrollment Guide	FL2CNCRGD76522S_0 ... FL2CNCRGD76522S_0C Enrollment Guide

- *Table View* – will display a smaller Icon of item cover page, with a longer item description.

Order Wizard Search (144 items found) Order Wizard Search

Selections: ☒ FL ☒ 2022 ☒ WellCare/Centene Medicare

View: Icons | **Table** | Text Sort By: Item # Show: 24 Page: 1 2 ... 6 ADD TO CART

Item Description	Item Type	Order Qty	Cart
FL2CNCRGD76050E_0055 ENG Enrollment Guide for Contract(s):H5190006000 Plan(s):Wellcare Dual Nurture (HMO D-SNP) Countie(s):Miami-Dade 	Enrollment Guide		

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- *Text View* – Will only display the longer item description.

Order Wizard Search (144 items found)			Order Wizard Search
Selections: ☒ FL ☒ 2022 ☒ WellCare/Centene Medicare			
View: Icons Table Text Sort By: Item #  Show: 24  Page: 1 2 ... 6			
Item Description	Item Type	Cart	
FL2CNCRGD76050E_0055 ENG Enrollment Guide for Contract(s):H5190006000 Plan(s):Wellcare Dual Nurture (HMO D-SNP) Countie(s):Miami-Dade	Enrollment Guide		
FL2CNCRGD76051E_0056 ENG Enrollment Guide for Contract(s):H5190005000 Plan(s):Wellcare Dual Nurture (HMO D-SNP) Countie(s):Broward, Duval, Hillsborough, Orange, Osceola, Palm Beach, Pasco, Pinellas, Polk, Seminole, Volusia	Enrollment Guide		

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Adding Items to Cart – Click to return to menu

There are 3 ways to add an item to your cart, “order quantity”, “hover over” and “icon” method.

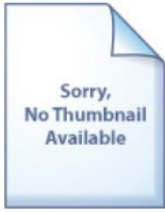
- *Order Quantity Method* - to add materials using “quantity” method, select **Table** view.
 - In the Order Qty bar, type the quantity of materials desired. If ordering multiple materials, input the quantity for each.
 - Select **ADD TO CART** button.

Order Wizard Search (144 items found) Order Wizard Search

Selections: ☒ FL ☒ 2022 ☒ WellCare/Centene Medicare

View: Icons | **Table** | Text Sort By: Item # Show: 24 Page: 1 2 ... 6

2 **ADD TO CART**

Item Description	Item Type	Order Qty	Cart
 Sorry, No Thumbnail Available FL2CNCRGD76050E_0055 ENG Enrollment Guide for Contract(s):H5190006000 Plan(s):Wellcare Dual Nurture (HMO D-SNP) Countie(s):Miami-Dade  	Enrollme Guide 1	1	

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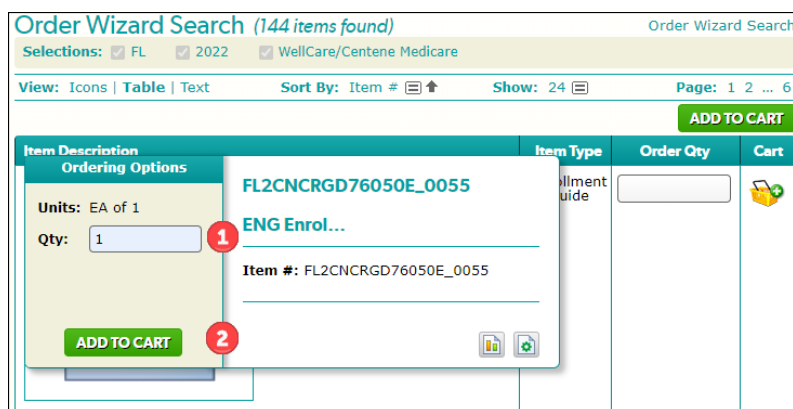
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- *Hover Over Method* – to add materials using the “hover” method, hover your mouse icon over the item description in any view.
 - Once the pop-out appears insert the quantity of materials desired.
 - Select **ADD TO CART**.

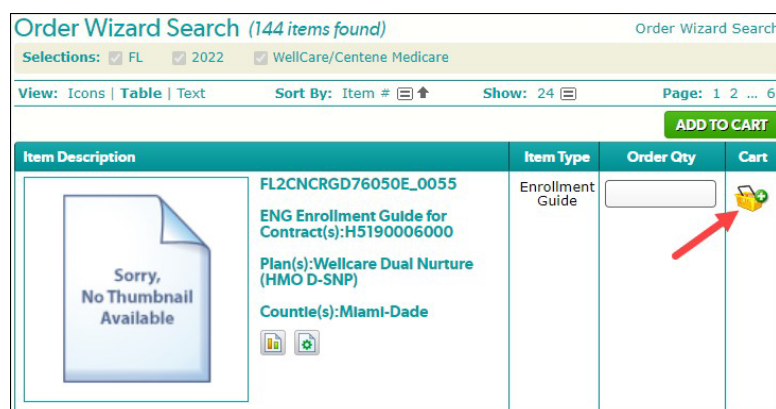
This is not the preferred method.

Note: Quantity number is required to add material to cart.



- *Icon Method* – This method is only available in the table and text view.
 - Select the **Order** icon. This will add the material to your cart. You will not be able to define the quantity of the material until the check-out process.

This is NOT the preferred method.



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Checkout – [Click to return to menu](#)

The below instructions pertain to the five screens related to making changes to an order.

Saving an Order – [Click to return to menu](#)

Throughout the checkout process, there will be a Save Order button located at the bottom left corner of the page. This allows you to save your order and resume the order at a later time.

- 1) To save an order, select the **SAVE ORDER** button.

The screenshot displays the CustomPoint Shopping Cart interface. At the top, a navigation bar includes links for 'Welcome, Broker Name', 'My Profile', 'Sign Out', a shopping cart icon with 'Cart 2', 'Help ?', and 'CustomPoint 8.0'. Below this is a teal header with the 'wellcare' logo and a 'Welcome to CustomPoint' message. A secondary navigation bar contains 'HOME', 'ORDERS', 'MANAGE', 'REPORTS', and 'CONFIGURE'. The main content area is titled 'Shopping Cart Contents (2 Items)' and lists two items under 'Order Lines':

- Item 1: ENG Benefit Highlight B056, Item #: FL2WCMBOV77904E_B056, Units: EA of 1, Qty: 5. A 'Remove Item' button is present.
- Item 2: ENG Benefit Highlight B074, Item #: FL2WCMBOV77918E_B074, Units: EA of 1, Qty: 150. A 'Remove Item' button is present.

Each item has a placeholder image with the text 'Sorry, No Thumbnail Available'. An 'UPDATE CART' button is located at the bottom right of the item list. At the bottom of the page, a teal bar contains four buttons: 'SAVE ORDER' (highlighted with a red arrow), 'REMOVE ALL', 'More Cart Options' (with a dropdown arrow), 'CONTINUE SHOPPING', and 'CHECK OUT'.

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- 2) Assign an **Order Name** and select **SAVE**.

Wellcome, Broker Name | My Profile | Sign Out | Cart 5 | Help ? | CustomPoint 8.0[®]

HOME | ORDERS | MANAGE | REPORTS | CONFIGURE

Saved Order Details

Order Name: *
FL Order Number 1 **SAVE** Ship To Address: Not Yet Provided

No.	Item Description	Item #	Units	Qty Ordered
1	ENG enrollment Guide Book 0074	FL2WLRRGD76074E_0074	EA of 1	0
2	ENG enrollment Guide Book 0056	FL2CNCRGD76051E_0056	EA of 1	0
3	SPA enrollment Guide Book 0056	FL2CNCRGD76522S_0056	EA of 1	0
4	ENG Benefit Highlight B056	FL2WCMBOV77904E_B056	EA of 1	0
5	ENG Benefit Highlight B074	FL2WCMBOV77918E_B074	EA of 1	0

CANCEL

- 3) To access the saved order, select the **Saved Orders** link on the home page.

Wellcome, 2022 TEST | My Profile | Sign Out | Cart 0 | Help ? | CustomPoint 8.0[®]

HOME | ORDERS | MANAGE | REPORTS | CONFIGURE

Welcome

Centene Enrollment Guides Announcement 07/29/2021
Centene Enrollment Guides ordered after 7/27/21
Your orders may show canceled These are really in process;
For tracking inquiries regarding Centene Enrollment Guides ordered after 7/27/21 please contact CCS_PreOrders

2022 Plan Year
Important Notes:
Pre-Ordering for the markets will begin July 22nd, 2021 and end July 29th, 2021. CustomPoint will not re-open for the markets until October 4th, 2021.
Broker ordering will open up on August 30th, 2021. Brokers MUST BE active certified and ready to sell for 2022 PY in order to get access to 2022 materials.
2022 materials can only be ordered through CustomPoint. If you need further assistance with placing your order, please call Broker Support at 1-866-822-1339.
CustomPoint will offer product materials for the following 2022 health plans. Note: Health Plan availability may differ by market.
WellCare Centene (Includes: AllWell, HealthNet, and Fidelis)
Ascension
PDP

User Guide for 2021 AEP
WellCare CustomPoint User Guide for 2021 AEP

Helpful Documents
Important reference documents found here:
[User Guide](#)
Frequently Asked Questions and answers found here:
[2021 CustomPoint FAQ](#)

Order Reminders
Here are your saved or pending orders awaiting completion:
[Saved Orders \(1\)](#)
[Pending Orders \(55\)](#)

- 4) Select the **Continue Order** icon.

Wellcome, 2022 TEST | My Profile | Sign Out | Cart 0 | Help ? | CustomPoint 8.0[®]

HOME | ORDERS | MANAGE | REPORTS | CONFIGURE

Saved Orders

Order Name	Date and Time	Saved By	Items	Continue Order
System Saved - 07/30/2021 02:34 PM	07/30/2021 02:34 PM	System	8	

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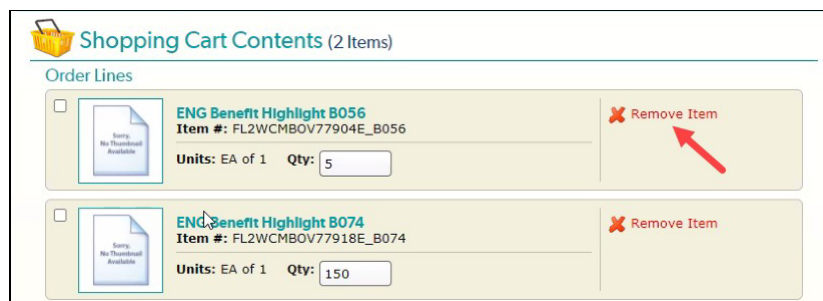
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5) You will then be re-directed to the shopping cart content page.

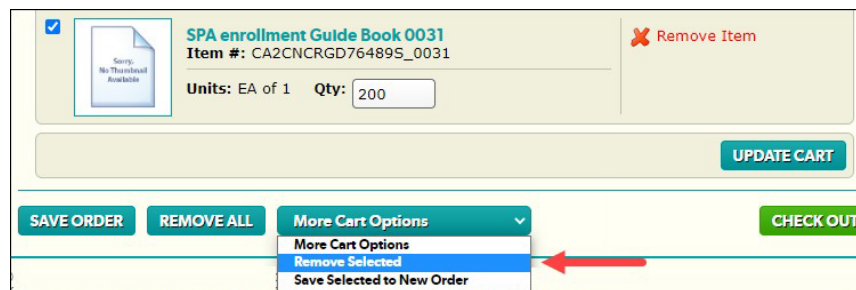
Removing Items – Click to return to menu

To remove an item you can click on the Remove Item icon (will remove one item at a time) or select the check boxes (removes multiple items).

- *Remove Item Icon* –Select the **Remove Item** Icon to remove one item at a time.



- *Check Box Removal* –Select the check box for the items you want to remove, then go to More Cart Options at the bottom and select **Remove Selected**.



Changing or Adding an Address – Click to return to menu

In CustomPoint, your location will have a prepopulated address if provided by the market. However, you also have the ability to change or add an address to a location. This allows you to ship the order directly to the desired location.

Note: Materials cannot be delivered to a P.O. Box.

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- *Selecting a prepopulated address*-any prepopulated addresses will be shown under the address found section. You can select one from your options and select next. Any address added to your address book will populate here too.

Wellcome, Broker Name My Profile Sign Out Cart 2 Help ? CustomPoint 8.0[®]

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Welcome to CustomPoint[™]
powered by BSA International LLC

HOME ORDERS MANAGE REPORTS CONFIGURE

Delivery Options Step 1 of 3

Address Source

Your Personal Address Book

Search Personal Address Book

Search For

Select One

SEARCH More Search Options

Addresses Found (2)

☐ Broker Name 2

☐ Broker Name

SAVE ORDER CANCEL BACK NEXT

- *Adding a new Address* – To add a new address on the Address Source dropdown select **Manually Enter Address**. Populate the new address, select the “**Add to Address Book**” check box and then Validate.

Delivery Options

Address Source

Manually Enter Address

Enter Address Here

Ship To Name * User Test1

Address Line 1 *

Address Line 2

Address Line 3

City * Tampa

State * Florida

Zip *

Country * United States

Phone

Ship To Attention

User Test1

VALIDATE ☒ Add to Address Book ☐ Is Default Address

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Additional Order Information – [Click to return to menu](#)

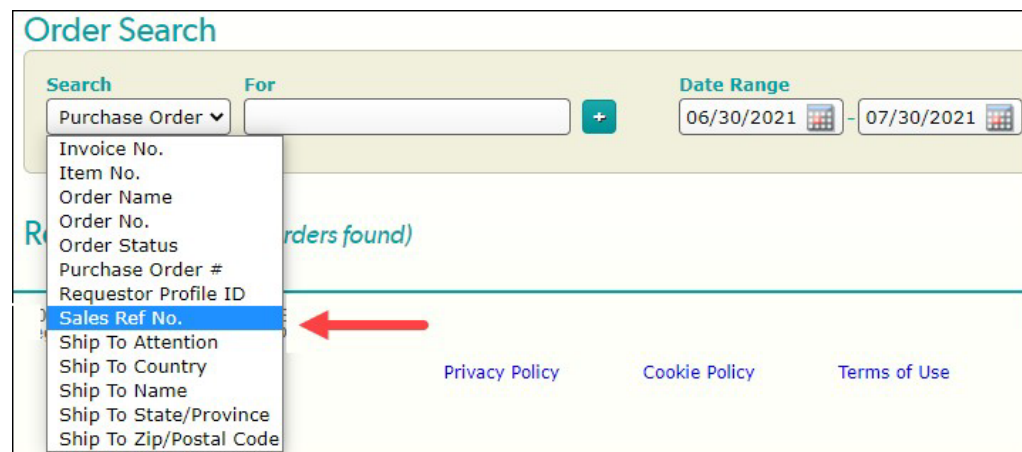
After an order has been approved, it begins the shipping process. You can see the status of your order as well as shipping information.

Searching for an Order – [Click to return to menu](#)

1. Select **ORDERS**, then **Order Search**.



2. Update the Search dropdown to Sales Ref No (1).



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3. Type in the Sales Reference Number provided during check out or on the confirmation email (2).
(Any denied orders will not show up here.)

Order Search

Search **1** For **2** Date Range Scope

Sales Ref No. 60632693 07/05/2021 - 08/04/2021 My Orders **SEARCH**

4. If it has been over 30 days since the order was approved, update the date range to include the order approval date (3).

Order Search

Search **1** For **2** Date Range **3** Scope

Sales Ref No. 60632693 07/05/2021 - 08/04/2021 My Orders **SEARCH**

5. Select **SEARCH** and the order will populate under the searched order (4).

Order Search

Search **1** For **2** Date Range **3** Scope **4**

Sales Ref No. 60632693 07/05/2021 - 08/04/2021 My Orders **SEARCH**

Recent Orders (2 orders found)

Columns: Custom Columns(2) Sort By: Order Date Show: 10 Page: 1

Sales Ref No.	Order Date	Order Name	Order Status	Item No.
60632693	08/04/2021		Mixed	
60542713	07/20/2021		System Denied Order	

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Tracking information – Click to return to menu

Once your order has shipped, tracking information will be in CustomPoint. To find tracking information, locate your order and follow the below steps.

1. Select the **Sales Ref No.** under Searched Orders.

Order Search

Search For: Sales Ref No. 60632693 Date Range: 07/05/2021 - 08/04/2021 Scope: My Orders SEARCH

Searched Orders (1 order found)

Sales Ref No.	Order Date	Order Name	Order Status	Item No.
60632693	08/04/2021		Mixed	

2. On the Order Detail Page, you can see the status of your order (C) as well as tracking information at the bottom (D)

Order Details for Sales Reference No. 60192787

Order Information: Order Status: Invoiced, Sales Reference No.: 60192787, Order Name: Houston, TX W2 Office, WellCare, Purchase Order #: 60192787, Order Date: 05/18/2021

Billing Information: Total Sale, Order and Line Charges, Sales Tax, Bill Method: Invoice Your Account

Customer and Address Information: Originator, Phone No., Email, Ship Date: 05/19/2021, Ship To

Routing Details

No.	Result	Item #	Queue Date	Routing Reasons	Approval Date
1	Line Approved	TX1WCMBOV59527E_B131	05/18/2021	- Quantity ordered exceeds the quantity limit.	05/18/2021
1	Line Approved	TX1WCMBOV59781S_B131	05/18/2021	- Quantity ordered exceeds the quantity limit.	05/18/2021

Items Ordered

Line No.	Item Description	Item #	Status	Unit	Qty	Shipped	Price
0001	TX BH VB131 ENG	TX1WCMBOV59 627E_B131	Invoiced	EA/1	300	300	
0002	TX BH VB131 SPA	TX1WCMBOV59 781S_B131	Invoiced	EA/1	200	200	

Shipping and Tracking Information

Ship No.	Warehouse	Ship Date	Price	Status	Carrier/Service	Tracking No.
0001	AUSTELL DIST CTR	05/19/2021	\$261.86	Invoiced	UPS / GROUND SERVICE	1Z1AW6330340913666

A. Order Information

B. Shipping Information

C. Status of order by line item

D. Tracking information - You can select the tracking number and it will redirect you to the Carrier Website

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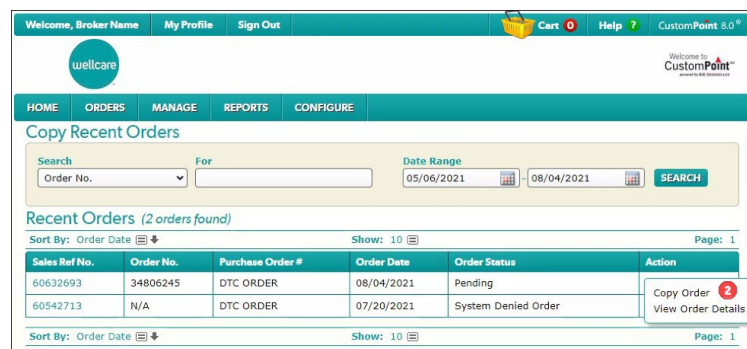
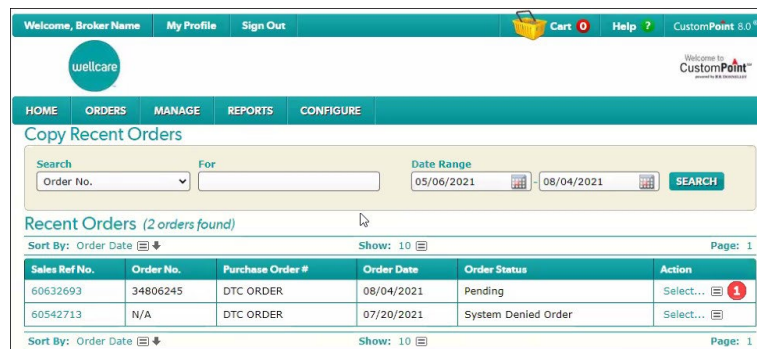
Re-Ordering a Previously Placed Order – Click to return to menu

CustomPoint has the ability to copy a previously placed order. To copy a previously placed order follow the below steps.

1. On the home page, select **ORDERS** and then **Copy Recent Orders**.



2. Under the Action column select **Copy Order** for the order, you'd like to copy.



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- The order will then be placed in your cart with the same items and quantities.

The screenshot displays the 'Shopping Cart Contents (2 Items)' page in the CustomPoint 8.0 application. The interface includes a top navigation bar with links for 'Welcome, Broker Name', 'My Profile', 'Sign Out', a shopping cart icon with a count of 2, a 'Help' link, and the version 'CustomPoint 8.0'. Below this is a secondary navigation bar with 'HOME', 'ORDERS', 'MANAGE', 'REPORTS', and 'CONFIGURE'. The main content area is titled 'Shopping Cart Contents (2 Items)' and lists two items under 'Order Lines'. Each item has a checkbox, a document icon, a description, an item number, units, a quantity input field, and a 'Remove Item' link. At the bottom of the cart area is an 'UPDATE CART' button. The footer contains 'SAVE ORDER', 'REMOVE ALL', 'More Cart Options' (with a dropdown arrow), 'CONTINUE SHOPPING', and 'CHECK OUT' buttons.

Order Lines
☐  ENG Benefit Highlight B056 Item #: FL2WCMBOV77904E_B056 Units: EA of 1 Qty: 5 Remove Item
☐  ENG Benefit Highlight B074 Item #: FL2WCMBOV77918E_B074 Units: EA of 1 Qty: 150 Remove Item

[UPDATE CART](#)

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