

Highmark Enrollment Kit Ordering

Agenda

Section 1	Accessing Highmark's ShopPRO
Section 2	Ordering Enrollment Kits
Section 3	Checking Out
Section 4	Order Status

Accessing Highmark's ShopPRO

Section 1

How to Access ShopPRO

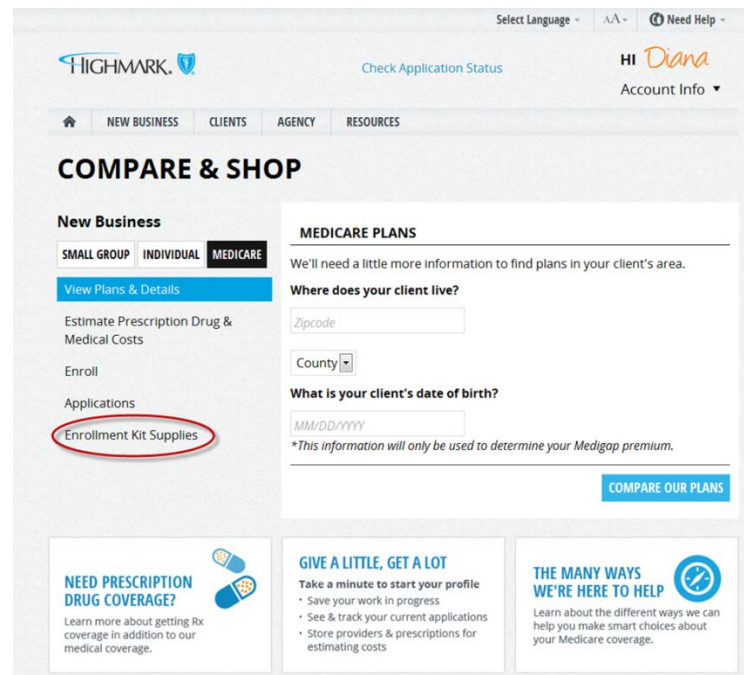
Step 1

To order enrollment kits, log on to the Highmark Medicare Producer Portal and click on the “New Business” tab as shown below:



Step 2

Ensure that the Medicare tab is selected and then simply click on the “Enrollment Kit Supplies” on the left hand navigation:



How to Access ShopPRO

Step 3

Once you click on the “Enrollment Kit Supplies” link you will be directed to the ShopPRO Order Status site and see the page shown below:

IMPERIUM
Power To Command

Brought to you by **heeter**

Welcome, Christopher (I)

07 THU Have Questions? Contact your CSR

Feedback

Search Jobs

Job Status

HM Senior Markets (HIGSE-FF)

Live Orders ☒ Cancelled Orders ☐

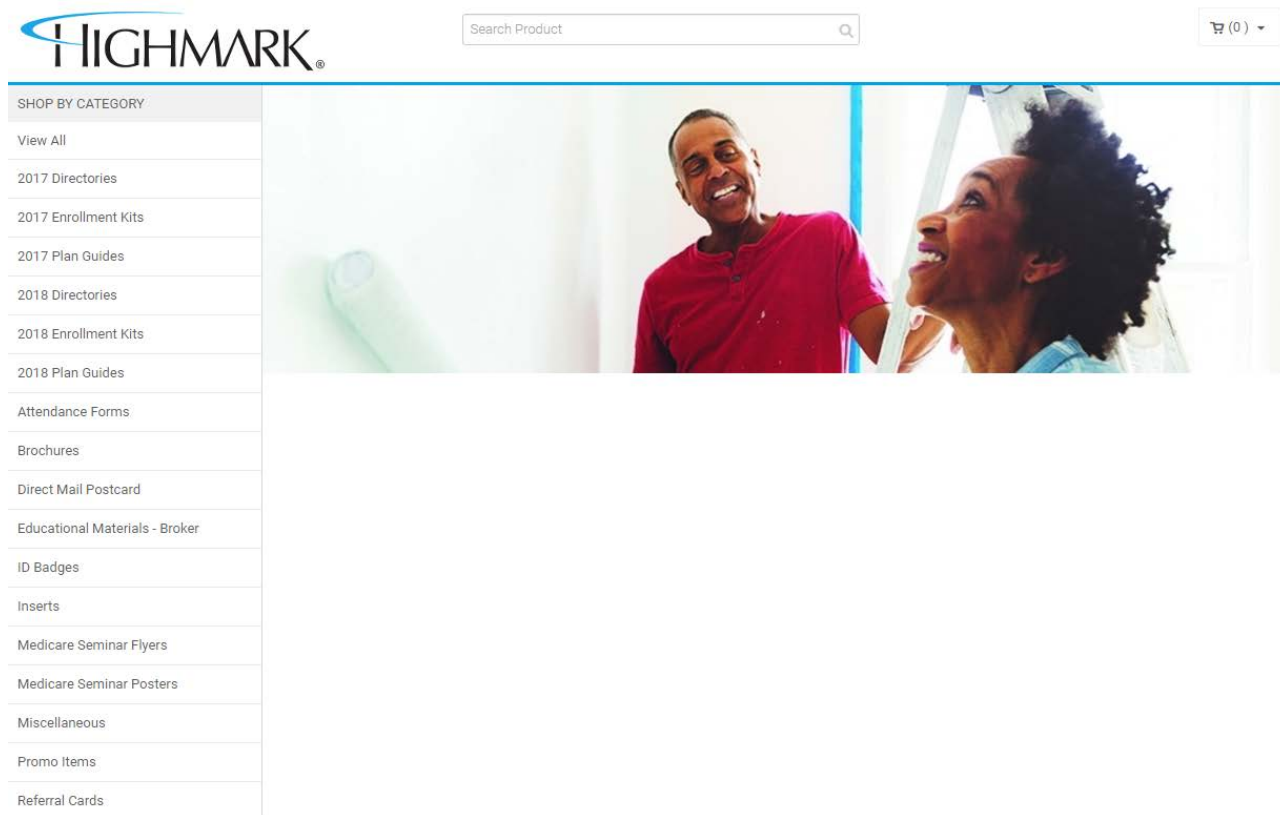
Shipped Orders ☐ Unapproved Orders ☒

Status	Order/Job #	Project Name	Status	Order Created By	Order Created	Actions
No orders to display, new orders can take up to 30 min to display once approved.						

How to Access ShopPRO

Step 4

Simply select the ShopPRO tab from the menu ribbon on the previous page. Once selected you will be directed to the page shown below:



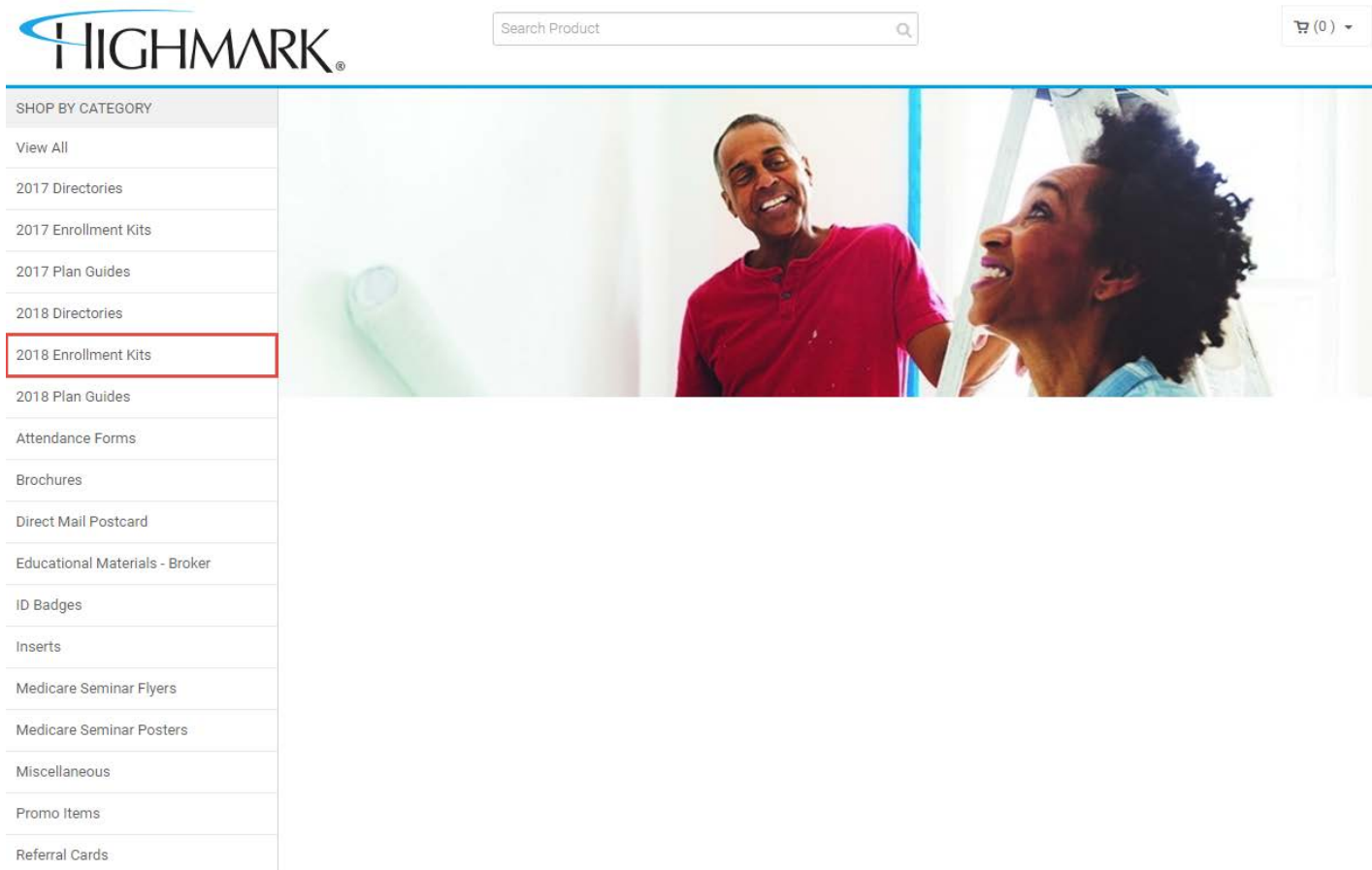
Ordering Enrollment Kits

Section 2

Ordering Enrollment Kits

Step 1

Select "2018 Enrollment Kits" to start the kit ordering process.



Ordering Enrollment Kits

Step 2

On the next page, select the region that you would like to order enrollment kits for.


The screenshot displays the Highmark website interface. At the top, the Highmark logo is on the left, a search bar labeled "Search Product" is in the center, and a shopping cart icon with "(0)" is on the right. Below the header, a blue sidebar on the left contains the text "All Categories" and "2018 Enrollment Kits". The main content area features four product cards, each with a graphic of people at a computer and a blue banner that reads "SALES/BROKER". The cards represent different regions: Central Pennsylvania, Northeastern Pennsylvania, West Virginia, and Western Pennsylvania. Each card has a "BROWSE" button and a text label below it: "SALES/BROKER - CENTRAL PENNSYLVANIA", "SALES/BROKER - NORTHEASTERN PENNSYLVANIA", "SALES/BROKER - WEST VIRGINIA", and "SALES/BROKER - WESTERN PENNSYLVANIA". The fourth card, for Western Pennsylvania, is highlighted with a red border.


Region	Product Name	Action
Central Pennsylvania	SALES/BROKER - CENTRAL PENNSYLVANIA	BROWSE
Northeastern Pennsylvania	SALES/BROKER - NORTHEASTERN PENNSYLVANIA	BROWSE
West Virginia	SALES/BROKER - WEST VIRGINIA	BROWSE
Western Pennsylvania	SALES/BROKER - WESTERN PENNSYLVANIA	BROWSE

Ordering Enrollment Kits

Step 3

Then select the kit type you would like to order. Please note that the list of counties for the respective version you select will appear on the next page.












All Categories

2018 Enrollment Kits

Sales/Broker - Western Pennsylvania


 MEDICARE PLANNING GUIDE. ORDER NOW	 MEDICARE PLANNING GUIDE. ORDER NOW	 MEDICARE PLANNING GUIDE. ORDER NOW	 MEDICARE PLANNING GUIDE. ORDER NOW
2018 BLUE RX SALES-BROKER Max Qty: 250 Finished Size: 8.5" x 11"	2018 SW CB PPO1 SALES-BROKER Max Qty: 250 Finished Size: 8.5" x 11"	2018 SW CB PPO2 SALES-BROKER Max Qty: 250 Finished Size: 8.5" x 11"	2018 WC CB PPO1 SALES-BROKER Max Qty: 250 Finished Size: 8.5" x 11"
 MEDICARE PLANNING GUIDE. ORDER NOW	 MEDICARE PLANNING GUIDE. ORDER NOW	 MEDICARE PLANNING GUIDE. ORDER NOW	
2018 WC CB PPO2 ONLY SALES-BROKER Max Qty: 250 Finished Size: 8.5" x 11"	2018 WC CB PPO2 SALES-BROKER Max Qty: 250 Finished Size: 8.5" x 11"	2018 WC NO CB SALES-BROKER Max Qty: 250 Finished Size: 8.5" x 11"	

Ordering Enrollment Kits

Step 4

Please make sure you confirm the counties listed to ensure you are ordering the correct version.

2018 SW CB PPO1 Sales-Broker ×



2018 SW CB PPO1 Sales-Broker

Medicare Planning Guide.
Additional plan information and application enclosed.

2018 SW CB PPO1 Sales-Broker

Max Qty: 250

Finished Size: 8.5" x 11"

Counties: Allegheny, Beaver, Butler, Fayette, Greene, Washington, Westmoreland

[Reset Filters](#)

Letter: Choose ▼

Product:

Continue Shopping


Order Now

Ordering Enrollment Kits

Step 5

You can select "Custom" if you would like to order personalized kits or you can select "Generic" for non-personalized kits.

2018 SW CB PP01 Sales-Broker ×



The image shows a Medicare Planning Guide kit. It features a photograph of a man and a woman looking at a document. The text on the kit reads: "HIGHMARK", "MEDICARE PLANNING GUIDE.", "Additional plan information and application enclosed", and "FORM 1-17-18 Approved".

Max Qty: 250
Finished Size: 8.5" x 11"

Counties: Allegheny, Beaver, Butler, Fayette, Greene, Washington, Westmoreland

[Reset Filters](#)

Letter:

Product:

Ordering Enrollment Kits

Step 6

If Custom is selected, you can enter your first and last name, your daily availability, your NPN and your phone number as is should appear within the enrollment kit. Once completed, select “Update Preview”.

The screenshot shows a web application interface for ordering enrollment kits. The top navigation bar includes the text "2018 SW CB PPO1 Sales-Broker" and several utility buttons: "Split Window", "Review My Job", "Help", and "Close". On the left side, there is a sidebar with a "Job Name" field containing "2018 SW CB PPO1 Sales-Broker", and "Quantity" (1) and "Pages" (4) fields. The main area is titled "Personalization" and contains several input fields: "First Name" (Sally), "Last Name" (Sample), "Availability" (9:00 a.m.), "To" (5:00 p.m.), "Agent NPN" (123456789), and "Phone Number" (412-555-5555). At the bottom of the form, there is a "Preview" section with an "Update Preview" button. Below the form, there are "Save" and "Add to Cart" buttons.

Personalization	
* First Name	<input type="text" value="Sally"/>
* Last Name	<input type="text" value="Sample"/>
* Availability	<input type="text" value="9:00 a.m."/> ▼
* To	<input type="text" value="5:00 p.m."/> ▼
* Agent NPN	<input type="text" value="123456789"/>
* Phone Number	<input type="text" value="412-555-5555"/>

Preview

Ordering Enrollment Kits

Step 6 - Example

Below is the cover letter, application and application submission confirmation pages that are customized according to how the fields are completed above – these will also be available on the preview pages.

Find a Medicare plan for all you've got planned.

Thank you for considering Highmark Blue Cross Blue Shield for your Medicare plan coverage needs. With a wide range of affordable plan options, you're sure to find one that can meet your needs and budget.

To make finding your new plan easier, we've enclosed a 2018 Medicare Advantage Plan Brochure that offers a helpful, side-by-side comparison of all your options and highlights the benefits and extras you'll enjoy.

Where to begin:

- Start up on the **2018 Medicare Advantage Plan Brochure**
- Review the booklet for complete coverage information
- Complete your enrollment application (see page <<page number>>)

Our Licensed Medicare Advisors are ready to help you every step of the way. If you have any questions, please contact us.

Remember, the enrollment deadline is December 7, 2017.

I'm here to help.

As your Licensed Medicare Advisor, I'd be happy to answer your questions and walk you through your options.

Contact me

Sally Sample
Senior Medicare Advisor
1-412-555-5555
(TTY users may call 711)
9:00 a.m. - 4:00 p.m. seven days a week

AGENT & OFFICE USE ONLY

Date Received: _____ Group Number: _____ Effect Date: _____

Agent Name: Sally Sample Agent ID: 123456789

☐ New Initial Consultation ☐ Medicare Signatures Transfer

☐ Medicare Certification ☐ Medicare Benefit Issue

☐ Pre-approval (if any) ☐ Other

TO ENROLL IN COMMUNITY BLUE MEDICARE HMO, SECURITY BLUE HMO, COMMUNITY BLUE MEDICARE PPO OR FREEDOM BLUE PPO, PLEASE PROVIDE THE FOLLOWING INFORMATION:

First Name: _____ Middle Initial (if applicable): _____ Last Name: _____ Suffix: _____ Sex: ☐ Male ☐ Female

Home Address (Rt, P.O. Boxes): _____ Apt# _____ City: _____ State: _____ Zip: _____ County: _____

Mailing Address (P.O. Boxes allowed): _____ Apt# _____ City: _____ State: _____ Zip: _____ Date of Birth: _____

Home Phone (with area code): _____ Email Address (if applicable): _____

PLEASE PROVIDE YOUR MEDICARE INSURANCE INFORMATION:

Please take out your Medicare card to complete this section.

- Please fill in these blanks so they match your red, white and blue Medicare card – OR –
- Attach a copy of your Medicare card or your letter from Social Security or the Railroad Retirement Board.

PLEASE CHECK WHICH PLAN YOU WANT TO ENROLL IN:

PLEASE MARK ONLY ONE SELECTION:

Community Blue Medicare HMO	Community Blue Medicare PPO	Security Blue HMO	Freedom Blue PPO
<input type="checkbox"/> Signature – \$0 per month	<input type="checkbox"/> Signature – \$13.00 per month	<input type="checkbox"/> Basic – \$00.00 per month	<input type="checkbox"/> ValueRx – \$79.00 per month
<input type="checkbox"/> Prestige – \$197.00 per month		<input type="checkbox"/> ValueRx – \$67.00 per month	<input type="checkbox"/> Select – \$174.00 per month
		<input type="checkbox"/> Standard – \$202.50 per month	<input type="checkbox"/> Classic – \$290.00 per month
		<input type="checkbox"/> Deluxe – \$270.50 per month	

PAYING YOUR PLAN PREMIUM

You can pay your monthly plan premium including any late enrollment penalty that you currently have or may need, by mail, or electronic Funds Transfer (EFT) or on the web with eBill each month. You can also choose to pay your premium by automatic deduction from your Social Security or Railroad Retirement Board (RRB) benefit check each month. If you don't select a payment option, you will get a bill each month.

Please select a premium payment option:

Get a bill. Information about EFT and eBill will be included with your first bill.

☐ Monthly ☐ Quarterly ☐ Semi-Annually ☐ Annually

☐ Automatic deduction from your monthly Social Security or RRB benefit check. (The deduction may take two or more months to begin after approval. In most cases, if approved, the first deduction from your benefit checks will include all premiums due from your enrollment effective date up to the point withholding begins. If not approved, we will send you a paper bill for your monthly premiums.)

OTHER INSURANCE

1. Are you currently enrolled in a non-Medicare Highmark Blue Cross Blue Shield health plan? Yes ☐ No ☐
If YES, name of plan: _____

2. Will either you or your spouse be employed once enrolled in Community Blue Medicare Self: Yes ☐ No ☐
HMO, Security Blue HMO, Community Blue Medicare PPO or Freedom Blue PPO? Spouse: Yes ☐ No ☐
Your Retirement Date (Month/Day/Year): _____ Spouse's Retirement Date (Month/Day/Year): _____

Your Highmark application confirmation

Date: ____/____/____

Name: _____

Plan:

Security Blue HMO	Freedom Blue PPO	Community Blue Medicare HMO	Community Blue Medicare PPO
<input type="checkbox"/> Basic	<input type="checkbox"/> ValueRx	<input type="checkbox"/> Signature	<input type="checkbox"/> Signature
<input type="checkbox"/> ValueRx	<input type="checkbox"/> Select	<input type="checkbox"/> Prestige	
<input type="checkbox"/> Standard	<input type="checkbox"/> Classic		
<input type="checkbox"/> Deluxe			

Your Licensed Medicare Advisor Sally Sample

Advisor phone number 1-412-555-5555

Advisor signature _____

Checking Out

Section 3

Checking Out

Step 1

After selecting "Add to Cart" on the bottom right of the page, you will be taken to a "Cart" page where you can confirm your order. You can change the quantity of your order on this page and/or select "Continue Shopping" to add more materials to your order.




A shopping cart icon followed by the text "(1)" and a dropdown arrow.

Please be sure to check your shipping address.

If incorrect, you can make the change in the **"Select a shipping address & shipping options"** page or you can **"Edit Profile"** in the upper right hand corner drop down below your name.

CART

Products	Quantity
 <u>2018 SW CB PPO1 Sales-Broker</u> Item Name: 2018 SW CB PPO1 Sales-Broker	<input type="text" value="1"/> ♥ Save for later 🗑 Remove

[← CONTINUE SHOPPING](#)[CLEAR CART](#)[PROCEED TO CHECKOUT →](#)

Checking Out

Step 2

After selecting "Proceed to Checkout", the following screen will capture the necessary shipping information. **Please confirm the shipping information is correct before placing your order.**

*When you enter a shipping address for an order, it can be saved to your address book to use for future orders by clicking the "Save to Address Book" checkbox.

The screenshot displays the Highmark checkout interface. At the top, the Highmark logo is visible. Below it, a progress bar shows three steps: 1. Shipping, 2. Payment, and 3. Finish. The current step is 'Shipping', with the heading 'Select a shipping address & shipping options'. A blue banner contains a disclaimer: 'Your order contains estimated amounts; final charges will be calculated upon completion of your order. If paying by Credit Card, the initial authorization may not reflect the final total. You will only be charged for the final amount.' The 'SHIPMENT 1' section prompts the user to select a shipment type, with 'FedEx Ground' chosen. The 'ADDRESS' section includes a link to 'Add from Address Book' and fields for First Name (Sally), Last Name (Sample), and three address lines (120 Fifth Ave, Address Line 2, Address Line 3). Other fields include City (Pittsburgh), State/Province/Region (PA - Pennsylvania), Zip/Postal Code (15222), Country (United States), Phone Number 1 (412-544-7000), and Email (sally.sample@highmark.com). A 'Delivery Instructions' text area is also present. A checkbox labeled 'Save to My Address Book' is checked. Below this are 'Save' and 'Cancel' buttons, followed by the text 'You must click save to proceed with checkout.' An 'Add Another Recipient' button is located at the bottom of the form. On the right side, a 'Products' list shows 'HMO PPO Combo SW Broker - Custom Cover/Custom Letter' with item name and quantity (50). At the bottom of the page, there are two buttons: 'CONTINUE SHOPPING' and 'PROCEED TO PAYMENT'.

Highmark

1 Shipping 2 Payment 3 Finish

Select a shipping address & shipping options

1 *Your order contains estimated amounts; final charges will be calculated upon completion of your order. If paying by Credit Card, the initial authorization may not reflect the final total. You will only be charged for the final amount.

SHIPMENT 1

Please select a shipment type:

FedEx Ground

ADDRESS

[Add from Address Book](#)

* First Name: Sally

* Last Name: Sample

* Address Line 1: 120 Fifth Ave

Address Line 2:

Address Line 3:

* City: Pittsburgh

* State/Province/Region: PA - Pennsylvania

* Zip/Postal Code: 15222

Country: United States

* Phone Number 1: 412-544-7000

* Email: sally.sample@highmark.com

Delivery Instructions

☒ Save to My Address Book

Save Cancel

You must click save to proceed with checkout.

[Add Another Recipient](#)

CONTINUE SHOPPING

Products

HMO PPO Combo SW Broker - Custom Cover/Custom Letter

Item Name: HMO PPO Combo SW Broker - Custom Cover/Custom Letter

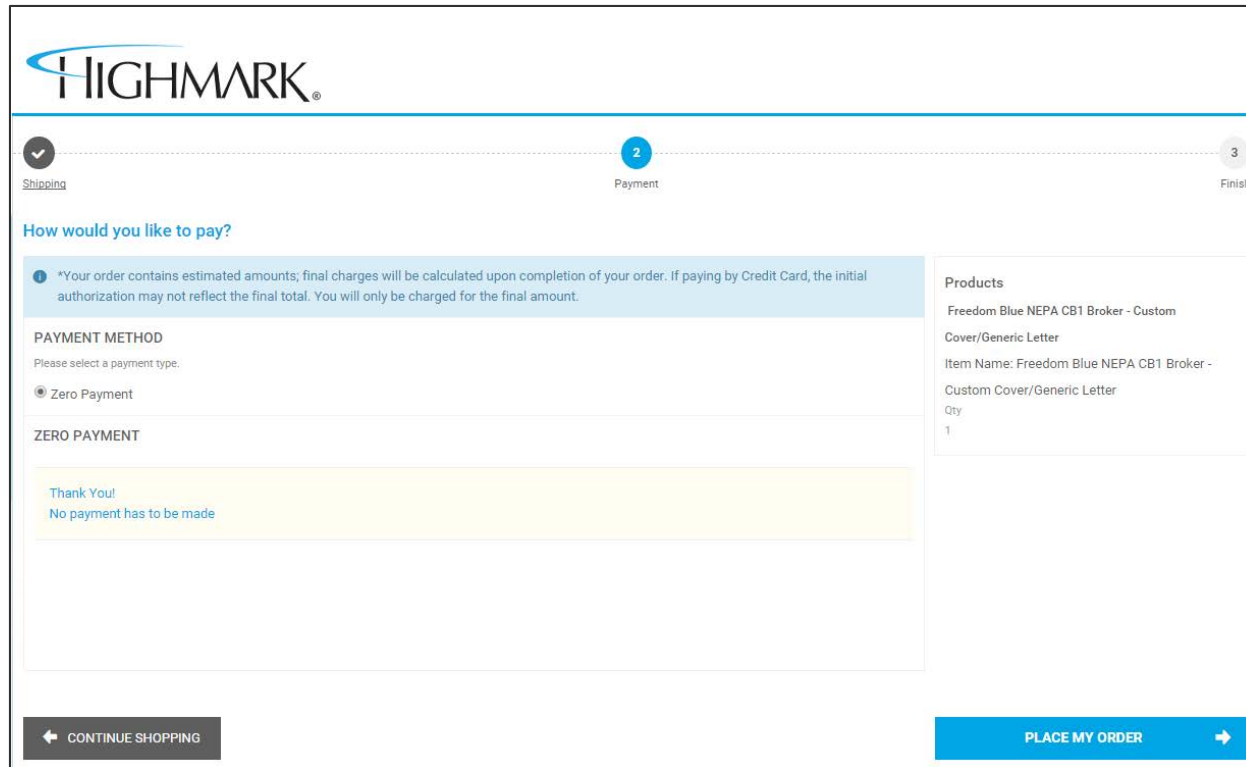
Qty: 50

PROCEED TO PAYMENT

Payment Details Page

Step 3

As the final step, the payment screen is displayed. For almost all products, payment due will be zero:



The screenshot displays the Highmark Payment Details Page. At the top, the Highmark logo is visible. Below it, a progress bar shows three steps: 'Shipping' (completed, marked with a checkmark), 'Payment' (current step, marked with a '2' in a blue circle), and 'Finish' (marked with a '3' in a grey circle). The main heading is 'How would you like to pay?'. A light blue informational box states: '*Your order contains estimated amounts; final charges will be calculated upon completion of your order. If paying by Credit Card, the initial authorization may not reflect the final total. You will only be charged for the final amount.' Below this, the 'PAYMENT METHOD' section asks 'Please select a payment type.' and shows 'Zero Payment' as the selected option with a radio button. Under 'ZERO PAYMENT', a yellow box contains the text 'Thank You! No payment has to be made'. On the right side, the 'Products' section lists 'Freedom Blue NEPA CB1 Broker - Custom Cover/Generic Letter' with an item name and a quantity of 1. At the bottom, there are two buttons: 'CONTINUE SHOPPING' with a left arrow and 'PLACE MY ORDER' with a right arrow.

HIGHMARK®

Shipping Payment Finish

How would you like to pay?

1 *Your order contains estimated amounts; final charges will be calculated upon completion of your order. If paying by Credit Card, the initial authorization may not reflect the final total. You will only be charged for the final amount.

PAYMENT METHOD
Please select a payment type.

☒ Zero Payment

ZERO PAYMENT

Thank You!
No payment has to be made

Products
Freedom Blue NEPA CB1 Broker - Custom Cover/Generic Letter
Item Name: Freedom Blue NEPA CB1 Broker - Custom Cover/Generic Letter
Qty
1

← CONTINUE SHOPPING PLACE MY ORDER →

Order Status

Section 4

Order Status

Below is an example of what you will be able to view on the order status screen. Once your order is approved and has shipped, you will be able to click on the “Shipped” hyperlink and view the shipping status:

IMPERIUM
Power To Command

Brought to you by
heeter

Welcome, Jenna

Have Questions?
Contact your CSR

Feedback

SecurePRO ShopPRO ReportPRO HFIS

Job Status

Highmark SR - POD

Live Orders ☒ Cancelled Orders ☒
Shipped Orders ☒ Unapproved Orders ☒

Status	Order/Job #	Project Name	Status	Order Created By	Order Created On	Actions
Processing	HM15065CPAP009801	HM SR POD - Highmark Admin	Processing	Matt Kuhns	09/02/2015	
Shipped	HM2015_59047983	HM SR POD - None	Shipped on 08/28/2015	info@directedje.com	08/27/2015	
Shipped	HM2015_59047982	HM SR POD - None	Shipped on 08/28/2015	info@directedje.com	08/27/2015	
Processing	172	HM SR POD - Storefront	Processing	HMTest_Admin	09/04/2015	
Order Pending Approval	171	HM SR POD - ShopPRO Order	Order Pending Approval	lollinger	09/04/2015	
Order Pending Approval	170	HM SR POD - ShopPRO Order	Order Pending Approval	dtest	09/04/2015	
Processing	HM15065WPAP009812	HM SR POD - Highmark Admin	Processing	Darren Davies	09/04/2015	
On Back Order	169	HM SR POD - Storefront	On Back Order	Lollinger	09/04/2015	

400 items in 4 pages

*To see the status of shipped orders, please ensure you click the “Shipped Orders” toggle above which will turn green when selected.

Order History

To view your order history, select the ShopPRO tab from the menu ribbon on the Order Status page:

The screenshot displays the IMPERIUM Power To Command interface. The top header includes the IMPERIUM logo and the text "Brought to you by heeter". The main navigation ribbon features a home icon and a "ShopPRO" tab, which is highlighted with a red rectangle. On the right, a user greeting "Welcome, Jenna" is shown along with a "Have Questions?" link and a "Feedback" button. Below the navigation ribbon, the "Job Status" section is visible, featuring a dropdown menu set to "Highmark SR - POD" and four toggle switches for "Live Orders", "Cancelled Orders", "Shipped Orders", and "Unapproved Orders". A "Search Jobs" button and a refresh icon are also present. The bottom of the interface shows a table with columns: "Status", "Order/Job #", "Project Name", "Status", "Order Created By", "Order Created On", and "Actions".

Order History

On the following page, navigate to the upper right hand corner and hover over your name – then select the “Order History & Status” option:

The screenshot displays the Highmark user interface. At the top, there is a navigation bar with a 'HOME' link, a 'HELP' icon, and a user profile for 'JENNA TRUITT'. Below the navigation bar is a search bar labeled 'Search Product'. The main content area is divided into a left sidebar and a main panel. The sidebar contains links for 'Order History & Status', 'My Profile', 'Address Book', 'Print Shop', 'My Saved Files', 'My Saved Jobs', 'My Downloads', and 'Spending Accounts Usage'. The main panel is titled 'ORDER HISTORY & STATUS' and features three dropdown menus: 'Time period' (set to 'One Week'), 'Show status' (set to 'All'), and 'Sort by' (set to 'Order Date'). Below these filters, the first order is displayed: 'Order # 2977', 'Order Date 2/8/2016 10:09:22 PM', 'Due Date 2/11/2016 1:30:00 PM', and 'User approved Central PA Estate Planning Educational Flyer'. A red box highlights the 'ORDER HISTORY & STATUS' option in the user profile dropdown menu.

*You can click on the Order Number to view the order details