

# How to Order Your Enrollment Kits

**Step-by-step guide**

2023



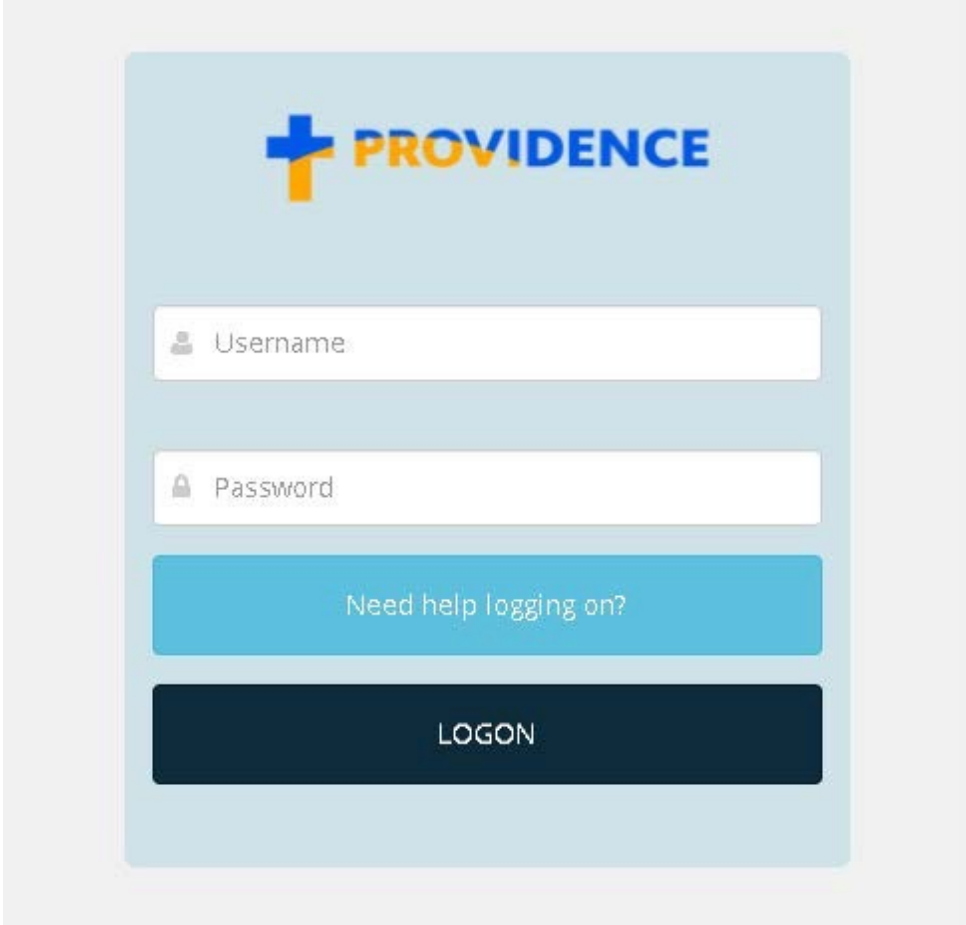


This document serves as a quick reference guide to help our producer partners order sales enrollment material. If you are ordering for the first time or just need a friendly reminder, this guide should help you get your order placed quickly and easily.

”Know me, care for me, ease my way.”

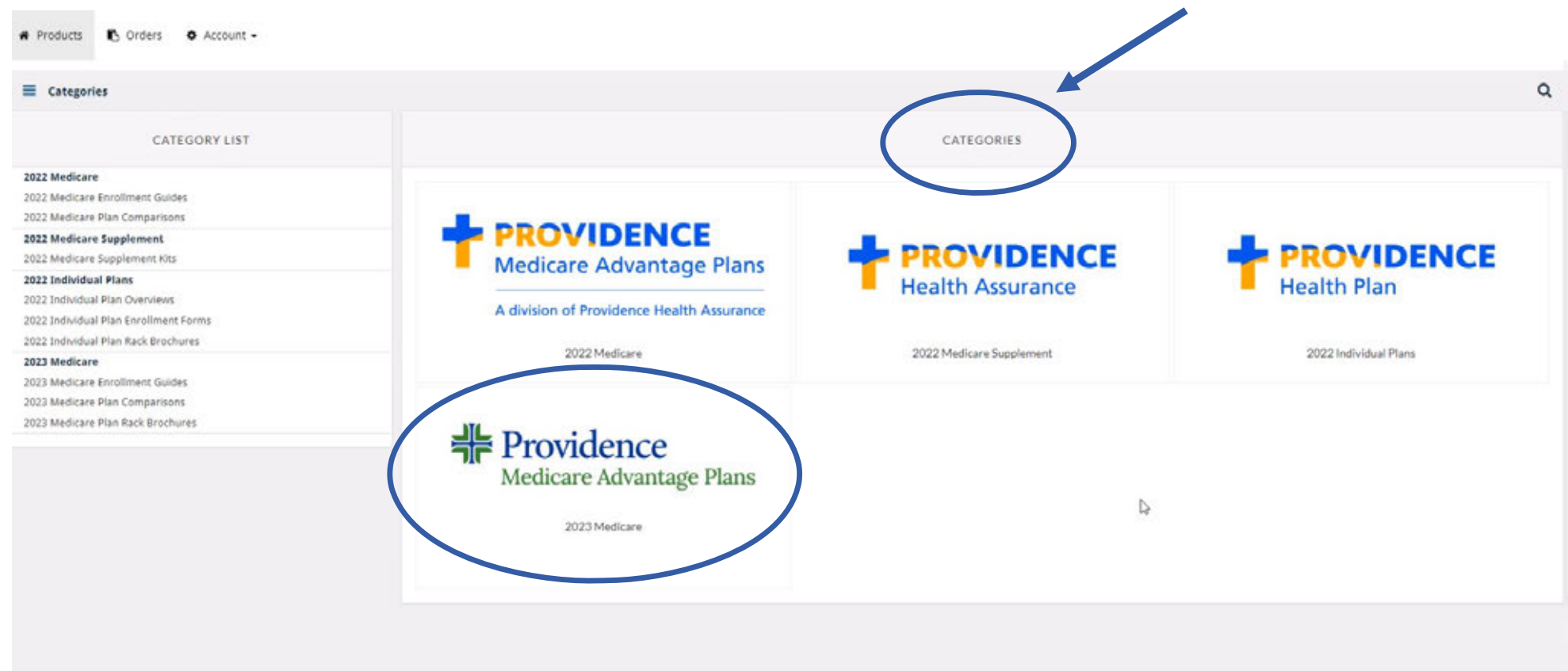
# Logging on

1. Go to: <https://allied.codysoft.net/PHA/catalog>
2. Enter Username = National Producer Number (NPN)
3. Enter Password - Default Password = Prov1
4. Click on LOGON

A screenshot of a web-based login interface for Providence. At the top, there is a logo consisting of a blue cross with an orange vertical bar to its right, followed by the word "PROVIDENCE" in blue capital letters. Below the logo, there are two input fields: the first is labeled "Username" with a small person icon to its left, and the second is labeled "Password" with a small lock icon to its left. Below these fields, there is a light blue button with the text "Need help logging on?". At the bottom, there is a dark blue button with the text "LOGON" in white capital letters.

# Categories

- 1. Click on product line and year you are interested in ordering under “CATEGORIES”



# Select your item

1. Click Select the item of interest

**NOTE:** You can always return to add additional items by clicking on “Products”



# Select Medical (HMO-POS) Plan

1. All service areas will be listed in the menu. Click “View Product” by your service area to order the appropriate Enrollment Kit.

The screenshot displays the Providence Health Plan website interface. At the top, there are navigation links for Products, Orders, and Account. Below this is a search bar and a menu icon. The main content area is divided into two sections: CATEGORY LIST and PRODUCTS. The CATEGORY LIST on the left includes links for 2022 Medicare, 2022 Medicare Supplement, 2022 Individual Plans, and 2023 Medicare. The PRODUCTS section on the right features the 2023 Service Area 1 Medicare Enrollment Kit (Includes Plan Comparison): 5 Count. A blue arrow points from the instruction text to the 'View Product' button, which is circled in blue. The product details include a list of inserts and a note that 1 pack equals 5 Medicare Enrollment Kits.

Products Orders Account

2023 Medicare Enrollment Guides

CATEGORY LIST

2022 Medicare

2022 Medicare Enrollment Guides

2022 Medicare Plan Comparisons

2022 Medicare Supplement

2022 Medicare Supplement Kits

2022 Individual Plans

2022 Individual Plan Overviews

2022 Individual Plan Enrollment Forms

2022 Individual Plan Rack Brochures

2023 Medicare

2023 Medicare Enrollment Guides

2023 Medicare Plan Comparisons

2023 Medicare Plan Rack Brochures

PRODUCTS

2023 Service Area 1 Medicare Enrollment Kit (Includes Plan Comparison): 5 Count

Service Area 1: Clackamas, Multnomah, Washington, and Yamhill Counties

MDC-381C

Insert 1 - Plan Comparison

Insert 2 - Pre-Enrollment Checklist

Insert 3 - Enrollment Application

Insert 4 - Summary of Benefits - Providence Medicare Prime + Rx (HMO)

Insert 5 - Summary of Benefits - Providence Medicare Bridge + Rx (HMO-POS)

Insert 6 - Summary of Benefits - Providence Medicare Choice + Rx (HMO-POS)

Insert 7 - Summary of Benefits - Providence Medicare Extra + Rx (HMO)

Insert 8 - Supplemental Benefit Flyer

Insert 9 - Scope of Appointment

Insert 10 - Medicare Star Rating

Insert 11 - Non-Discrimination Notice

1 Pack = 5 Medicare Enrollment Kits



# Quantity/add to cart

Under “Order Quantity” enter number of packets requested.

## 1. Click “Add to Cart”

The screenshot displays the product page for the '2023 Service Area 1 Medicare Enrollment Kit (Includes Plan Comparison): 5 Count'. The page includes a navigation bar with 'Products', 'Orders', and 'Account' links. The product image shows a '2023 Enrollment Guide' with a couple. The product details section lists the ID as MDC-381C and the service area as Clackamas, Multnomah, Washington, and Yamhill Counties. It lists 11 inserts: Plan Comparison, Pre-Enrollment Checklist, Enrollment Application, Summary of Benefits for Prime, Bridge, Choice, and Extra plans, Supplemental Benefit Flyer, Scope of Appointment, Medicare Star Rating, and Non-Discrimination Notice. Below this, the 'ORDER' section shows the 'Order Quantity' set to 2. At the bottom, a green 'Add To Cart' button is highlighted with a blue oval. A blue arrow points from this button to the instruction '1. Click “Add to Cart”'.

Products Orders Account

2023 Enrollment Guide

2023 Service Area 1 Medicare Enrollment Kit (Includes Plan Comparison): 5 Count

DESCRIPTION

ID: MDC-381C

Service Area 1: Clackamas, Multnomah, Washington, and Yamhill Counties

Insert 1 - Plan Comparison  
Insert 2 - Pre-Enrollment Checklist  
Insert 3 - Enrollment Application  
Insert 4 - Summary of Benefits - Providence Medicare Prime + Rx (HMO)  
Insert 5 - Summary of Benefits - Providence Medicare Bridge + Rx (HMO-POS)  
Insert 6 - Summary of Benefits - Providence Medicare Choice + Rx (HMO-POS)  
Insert 7 - Summary of Benefits - Providence Medicare Extra + Rx (HMO)  
Insert 8 - Supplemental Benefit Flyer  
Insert 9 - Scope of Appointment  
Insert 10 - Medicare Star Rating  
Insert 11 - Non-Discrimination Notice

1 Pack = 5 Medicare Enrollment Kits

ORDER

Order Quantity

2

Add To Cart

# Check out

1. Review items in your cart. If ok, click on “CHECK OUT”

The screenshot displays a web application interface for a Medicare Enrollment Kit. The top navigation bar includes links for Products, Orders, Reports, and Account. The main content area features a product image of a '2023 Enrollment Guide' on the left and a detailed product description on the right. The description includes the product ID (MDC-381C), the service area (Clackamas, Multnomah, Washington, and Yamhill Counties), and a list of 11 inserts. Below the description, there is an 'ORDER' section with a quantity input field set to 4 and a green 'Add To Cart' button. A blue arrow points from the instruction '1. Review items in your cart. If ok, click on “CHECK OUT”' to the 'Add To Cart' button, which is also highlighted with a blue oval.

Products Orders Reports Account

2023 Enrollment Guide

2023 Service Area 1 Medicare Enrollment Kit (Includes Plan Comparison): 5 Count

DESCRIPTION

ID: MDC-381C

Service Area 1: Clackamas, Multnomah, Washington, and Yamhill Counties

Insert 1 - Plan Comparison  
Insert 2 - Pre-Enrollment Checklist  
Insert 3 - Enrollment Application  
Insert 4 - Summary of Benefits - Providence Medicare Private + Rx (HMO)  
Insert 5 - Summary of Benefits - Providence Medicare Private + Rx (HMO-POS)  
Insert 6 - Summary of Benefits - Providence Medicare Choice + Rx (HMO-POS)  
Insert 7 - Summary of Benefits - Providence Medicare Extra + Rx (HMO)  
Insert 8 - Supplemental Benefit Flyer  
Insert 9 - Scope of Appointment  
Insert 10 - Medicare Star Rating  
Insert 11 - Non-Discrimination Notice

1 Pack = 5 Medicare Enrollment Kits

ORDER

Order Quantity

4

Add To Cart



# Shipping

1. If you have ordered prior, your address information should be saved under “Shipping Address”
2. If no address is listed or you want to ship to an address not used prior, click on “New Address”

The screenshot displays a web application interface with a top navigation bar containing links for Products, Orders, Reports, and Account. The main content area is divided into two sections: SHIPPING and BILLING. The SHIPPING section is highlighted with a blue oval and contains a 'New Address' button, a dropdown menu for 'Shipping Method' (currently set to 'Standard Shipping c-3-4 days'), and a 'Shipping Location' field with the address 'Home, 1234 Test Office, Portland OR 97200, 503-555-1234'. The BILLING section is currently empty. A blue arrow points to the 'New Address' button. The bottom of the page features a yellow banner with a red '2' icon and a message: 'Please enter a Billing First Name. Please enter a Billing Last Name.' Below this banner is a row of four buttons: 'cancel shipping', 'cancel order', 'save order', and 'SUBMIT ORDER'.

# Shipping cont.

Enter the following fields:

- a) Enter an Address Name such as Office or Home, this will expedite future orders
- b) Address Line – Needs to be a physical address, no PO BOX.
- c) First and Last name if being sent to an office
- d) City
- e) Company – if necessary
- f) Zip
- g) Phone – in case of questions
- h) Click Save

The screenshot shows a web application interface for shipping. At the top, there's a navigation bar with links for Products, Orders, Reports, and Account. Below this, a 'SHIPPING' section is active, displaying a form for entering shipping details. The form includes fields for 'Quick Address' (with a placeholder 'Enter a location'), 'Address Name' (with a dropdown menu showing 'Office'), 'Address Line 1' (with a placeholder '1234 Test Office'), 'First Name' (with a placeholder 'John'), 'Last Name' (with a placeholder 'Test'), 'Company Name' (with a placeholder 'Company Name'), 'City' (with a placeholder 'Portland'), 'State' (with a dropdown menu showing 'Oregon'), 'Zip' (with a placeholder '97000'), and 'Country' (with a dropdown menu showing 'United States of America'). There are also 'Phone' and 'Fax' fields. At the bottom of the form, there are 'Cancel' and 'Save Office' buttons. To the right of the shipping form, there's a 'CHECKOUT SUMMARY' section with a table for 'Items' and a link 'Concerned About Security?'. At the bottom of the page, there's a footer with a message: 'Please choose a shipping method. Please enter a billing first name. Please enter a billing last name.' and a navigation bar with links for 'Continue to Shipping', 'Review Order', 'Save & Order', and 'Cancel & Return'.

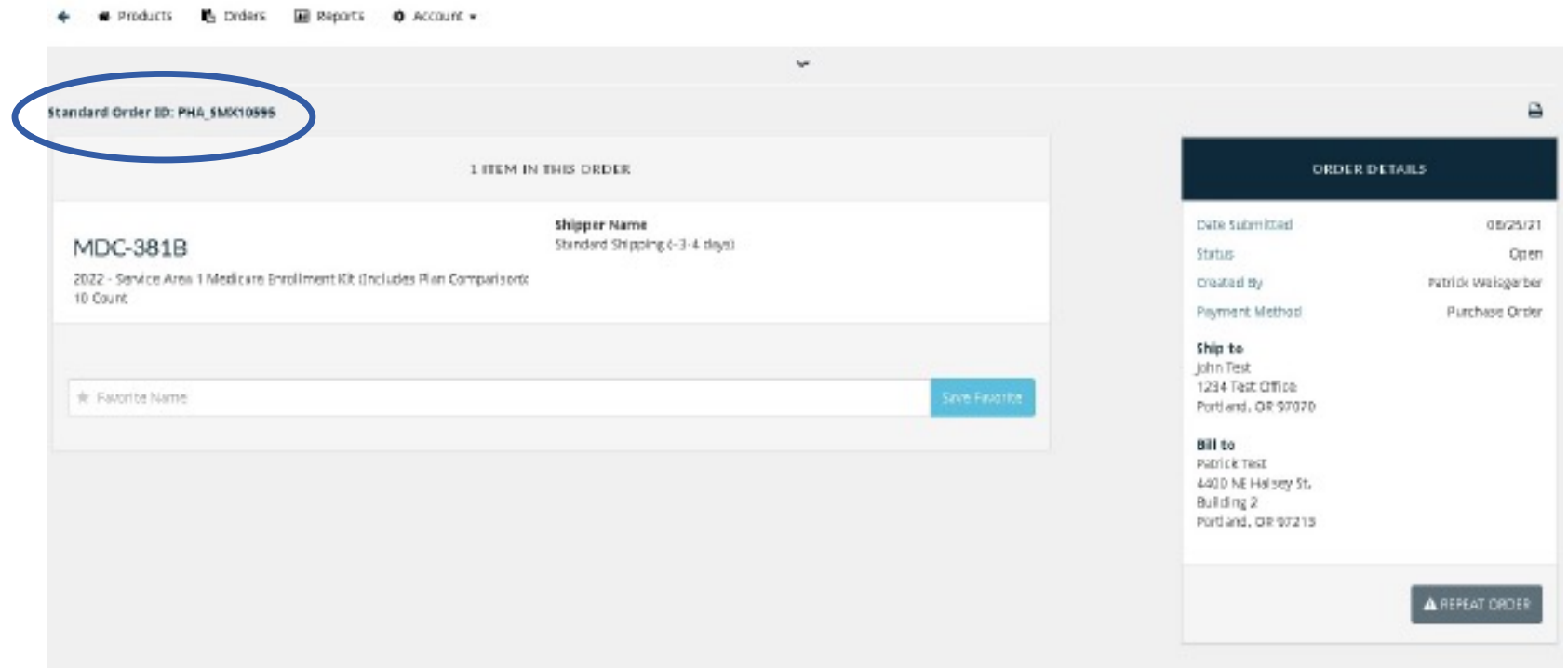
# Shipping method

1. Shipping Method = Standard
2. Billing – ignore, there is no cost to you to order supplies
3. Enter Email Address if you would like a copy of the order
4. Click on “SUBMIT ORDER

The screenshot displays a web application interface for ordering supplies. The main content area is divided into two sections: 'SHIPPING' and 'BILLING'. The 'SHIPPING' section includes a 'Shipping address' field with a dropdown menu, a 'Shipping Method' dropdown menu, and a 'Shipping Location' field. The 'BILLING' section is partially visible below the shipping section. To the right of the main content area is a 'CHECKOUT SUMMARY' panel. This panel includes a 'Items' section, an 'Email Address' field, and a checkbox labeled 'Send a copy of the order details to above email address'. A blue arrow points from the 'Shipping Method' dropdown menu to the 'Items' section of the checkout summary. Another blue arrow points from the 'SUBMIT ORDER' button in the main content area to the 'SUBMIT ORDER' button in the checkout summary panel. The bottom of the page features a navigation bar with buttons for 'Cancel Shipping', 'Cancel Order', 'Save Draft', and 'Submit Order'.

# Order number

We suggest that you keep a copy of the “Standard Order ID” in case you ever need to reference the order



The screenshot displays a web application interface for managing orders. At the top, there is a navigation bar with links for Products, Orders, Reports, and Account. The main content area is divided into two sections. The left section, titled '1 ITEM IN THIS ORDER', shows the item 'MDC-381B' with a description '2022 - Service Area 1 Medicare Enrollment Kit (Includes Plan Comparisons) 10 Count'. Below this, there is a 'Shipper Name' field with the value 'Standard Shipping (-3-4 days)'. A 'Favorite Name' input field with a 'Save Favorite' button is also present. The right section, titled 'ORDER DETAILS', contains a table with the following information:

ORDER DETAILS	
Date Submitted	05/25/21
Status	Open
Created by	Patrick Walsgarber
Payment Method	Purchase Order
<b>Ship to</b> John Test 1234 Test Office Portland, OR 97070	
<b>Bill to</b> Patrick Test 4900 NE Halsey St. Building 2 Portland, OR 97215	

At the bottom right of the 'ORDER DETAILS' section, there is a button labeled 'REPEAT ORDER'.

# Medicare contact information

## Submitting a Paper Application

Fax: 503-574-8653

Email: [ProvMedicare@providence.org](mailto:ProvMedicare@providence.org)

## Agent Coordinator Unit

Commission questions

Book for business requests

Agent appointments

Email: [AgtCoordinatorUnit@providence.org](mailto:AgtCoordinatorUnit@providence.org)

## Producer Support

- Questions about plan benefits
- Network questions
- Assistance with completing the application
- Status of application inquiries

Phone: 503-574-6300 Option 1

Email: [ProducerSupport@providence.org](mailto:ProducerSupport@providence.org)

## Pharmacy

Phone: 503-574-7635



**Thank You**