# ONEkit Broker Order Module
# Medicare Fulfillment

# ONEkit BOM User Guide

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# Broker Order Module - Medicare Fulfillment

**What is the BOM?**
ONEkit contains the Broker Order Module where agents utilize the web-based ordering module for Aetna products. Agents are able to order Medicare Advantage (MAPD), Plan Guides and Formularies.

**Product Availability**
Once logged on, agents will only be able to order product which they have completed licensing, appointments, certification and are contracted within.

**Ready to Sell Status**
The Ready to Sell (RTS) feed designates which product is displayed in the agent's profile within the BOM. It is based on the agents certification, contracting and license status by state. Each agent is responsible to ensure their certification is up to date for the product they wish to sell. If the agent cannot login or view the product or state needed please contact Aetna Broker Services at 866.714.9301 with any questions. A Broker Services representative will research the issue and advise on any next steps. If the agent has just become ready to sell it will take 48 business hours to enable access to the BOM.

## Access and Login

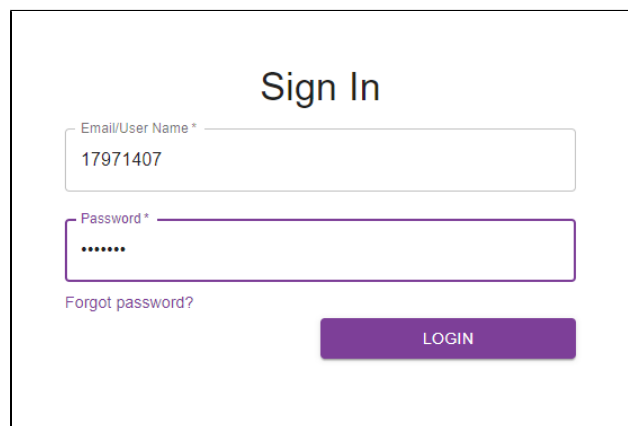Using Google Chrome, access the web page at https://aetna-pek-ff-op.memberdoc.com
ONEkit is not supported using Mozilla Firefox or Internet Explorer.

All brokers will log in using their NPN as their user name and password. The broker can change their password after the initial login using the Account

Profile button

Click Login to continue



## Navigation Notes

The agent can click on the Aetna logo  at the top of each page to return to the Homepage.

# Agent Homepage

The Homepage contains a message panel for any urgent or relevant information that agents should be made aware of. Entitlements are used to display appropriate menu options. Essential information including Plan Year, State, Products and Order Reminders are shown on this page. The agent will only be able to view the plan year and product they are licensed and certified for.



The Homepage also displays a side navigation panel for Order Reminders. Agents can quickly view saved or pending orders. Click the link inside the panel to display the list of saved orders. The BOM will automatically save orders that an agent has created but has not submitted.

The agent is then able to add any saved order to the shopping cart by selecting the cart icon located on the right hand side of the row.

| CA1 (saved on: 6/19/2020) | | | | |
|---|---|---|---|---|
| Item Description | Item Code | Item Type | Quantity | |
| 2020 NORTHERN AL-FREEDOM & BASICS PPO | 2020-AL01-NORTH ALABAMA | KT | 1 | 🛒 |

At the top right hand corner of all pages is a navigation menu containing:

- Help - ability to download the user guides as well as well as ask a question regarding the order application
- Account Profile - ability to view and update personal account details, view order history, view saved orders and view personal address book
- Shopping Cart - the broker can view, edit, save and checkout pending orders
- Log out - logs broker out of the order application
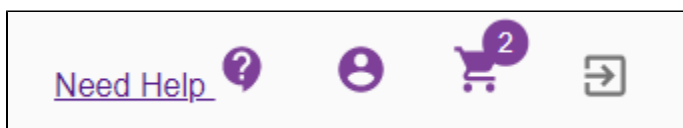


# Order Product

Select criteria for: Plan Year, State, and Product to find applicable items. Based on each agents certification and licensing the entitled plan year and states listed are shown. Select Next to start the ordering process.

| Medicare Broker Materials | | |
|---|---|---|
| Year | State | Product |
| 2020 | GA | MAPD |
| | | NEXT > |

*If the agent cannot login or able to view the state needed, please contact Aetna Broker Services at 866.714.9301 with any questions on licensing, contracting or
certification. A Broker Services representative will research the issue and advise on any next steps.*

The next page lists <u>all</u> products that are available in the selected market. Scroll down to view the entire list. There is a Favorites section where frequently used product can be added.  To modify the Plan Year or State use the pencil icon located at the top right of the product listing.

Use the filter on the left-hand side to select one or more desired material types including:

- Sales Kits
- Plan Guides
- Rx Formularies

| | | | |
|---|---|---|---|
| Year: ( 2020 ) | State: ( GA ) | Product: ( MAPD ) | ✏️ |

**Filter by Material Type**

☑ Kit

☑ Plan Guide

☑ Formularies

☐ Favorites

💬 **Message**

Welcome to our new Broker Ordering Module (BOM)! We are currently offering only Plan Year 2020 materials at this time. Our Plan Year 2021 materials will be available later this month. Please watch for our broker newsletter which will announce when Plan Year 2021 material is available to preorder.

| Item Description | Item Code | Order |
|---|---|---|
| **2020 GEORGIA: AETNA D-SNP PLANS** | | |
| VIEW COUNTIES AND CONTRACT/PBPS | 2020-GAS1-GEORGIA D-SNP | 🛒 |
| **2020 GA MKT: ATL METRO-ESSENTIAL PPO** | | |
| VIEW COUNTIES AND CONTRACT/PBPS | 2020-GA01-ESSENTIAL PPO | 🛒 |
| **2020 GEORGIA: AETNA HMO PLANS** | | |
| VIEW COUNTIES AND CONTRACT/PBPS | 2020-GA02-AETNA GA HMO | 🛒 |
| **2020 CHEROKEE COUNTY, GA-FREEDOM PPO** | | |
| VIEW COUNTIES AND CONTRACT/PBPS | 2020-GA03-CHEROKEE GA | 🛒 |
| **2020 GA MKT: ATL METRO-FREEDOM PPO** | | |
| VIEW COUNTIES AND CONTRACT/PBPS | 2020-GA04-ATL FREEDOM PPO | 🛒 |
| **2020 GA MKT: ATL METRO-PLUS PLAN PPO** | | |
| VIEW COUNTIES AND CONTRACT/PBPS | 2020-GA05-ATL PLUS PPO | 🛒 |

Each kit has a link under the name <u>VIEW COUNTIES AND CONTRACT/PBPS</u> that will display the contract number, PBPs, plan guides and formularies tied to the kit.

Use the download icon ⬇ located next to the Information panel to download the PDF onto the local PC. The download PDF will reside at the bottom of the frame and can the user can click and drag the pdf directly onto the desktop.  The PDF can then be attached to an email, printed or viewed directly on the PC for verification.

Add this kit to the shopping cart by entering the kit quantity and clicking Add to Cart button.  Once a kit is added to the cart the cart indicator will change with the updated kit quantity. Plan Guides and Formularies can be added from this screen as well.To return to the previous page select << Back located on the top left of the page.

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<< BACK  /  2020 GEORGIA: AETNA D-SNP PLANS

## 2020 GEORGIA: AETNA D-SNP PLANS

**Information** ⬇
Used: 0 of 15 (until 8/31/2020)

Contract PBPs:

**H5302-012-Dual Preferred Plan (HMO D-SNP)**: GA-Clayton, GA-DeKalb, GA-Forsyth, GA-Fulton, GA-Gwinnett
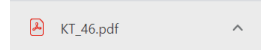
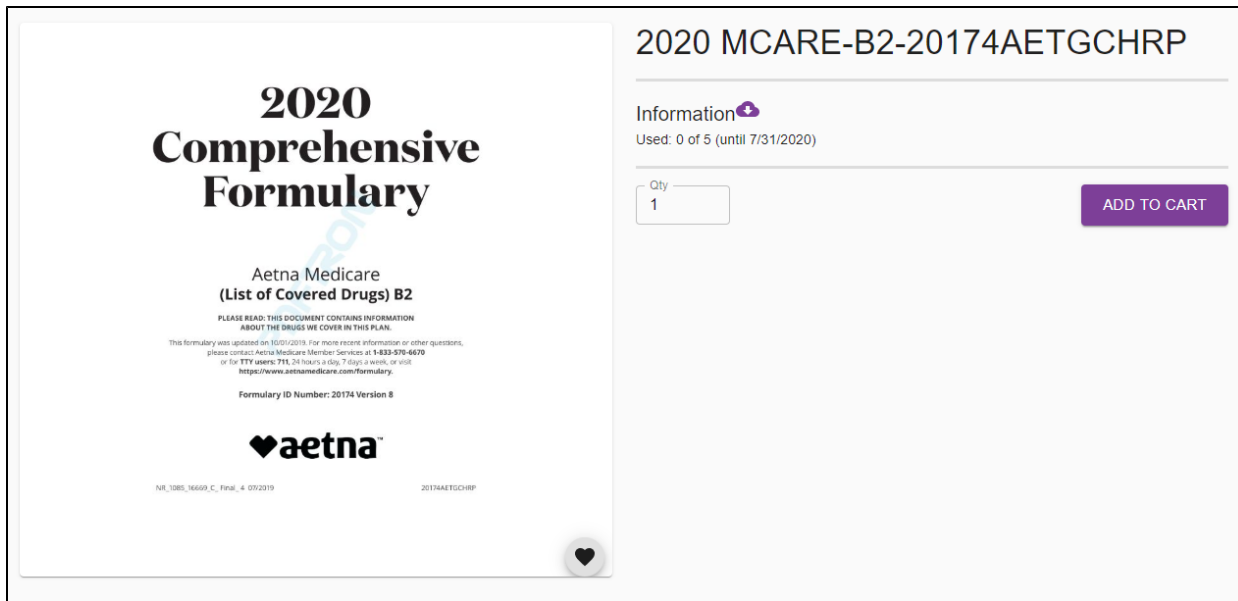**H5302-013-Dual Preferred Plan (HMO D-SNP)**: GA-Cobb

Qty
1

ADD TO CART

### Suggested Items

| Item Description | Item Code | Order |
|---|---|---|
| **2020 MCARE-PLAN GUIDE-GAS1-GEORGIA DSNP** | PG20-GAS1-GEORGIA D-SNP | 🛒 |
| **2020 MCARE-B2-20174AETHRP** | 20174AETHRP.1 | 🛒 |

KT_46.pdf

If needed, continue to add additional material including plan guides and formularies using this ordering process and page by clicking on the specific material and view a detail page regarding the material. Add the quantities and click Add to Cart button. When ordering formularies there is an option to

view a full size image by selecting the Information download icon



Another easy way to order materials without switching through multiple windows is by utilizing the hover feature. The hover feature allows the agent to view a thumbnail image of the material as well as the item description. The quantity can be updated directly within the hoover view and clicking on the Cart

button. Each kit name can be hovered over to offer a quick view of the material as well as update the quantity and add to the cart directly from this window.

# Shopping Cart

Viewing the Shopping Cart page will display the current order. The agent has a few features within this page:

- Modify order product and details
- Order limit
- Save order for later

## Modify Order

The agent can modify the order in the cart by updating the quantity field or using the Delete button 🗑 to delete any product from the order.



## Order Limits

⚠ If the monthly order limit is exceeded a yellow warning banner will appear!

⚠ Thank you for your interest in Aetna Medicare Products. Your order exceeds the monthly allocation limit for this item. During the checkout process please explain your need for additional supplies and your local sales team will review the order. Thank you!

This banner does not prohibit an agent from placing an order, as it states placing additional orders over the limit will require a reason for the order as well as a review by Local Market for approval. Allow additional time for the order to be reviewed. If needed, the Local Market will contact the agent directly with any questions. This could result in a slight delay processing the order.

# Save Order

The agent back save an order (full or partial) by selecting the checkbox on the left side of the rows and select the Save Order button.

| Action | Product | | Quantity |
|---|---|---|---|
| ☑ 🗑 |  | **2020 MCARE-B4-20175AETGC** | Qty<br>1<br>Up to 25 |
| ☑ 🗑 |  | **2020 MCARE-PLAN GUIDE-OR02-SOUTHERN-OREGON** | Qty<br>1<br>Up to 50 |

SAVE ORDER                                                                          CHECK OUT
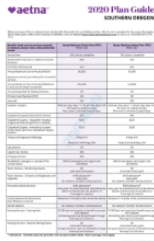
# Checkout

When the order is ready to be submitted for review click the Checkout button on the shopping cart page. On the Checkout page the details of the order are listed with the quantities.

## Shipping Addresses

The Shipping Address is where the agent can:

- Manually enter a new address
- Use a previously saved address from the address book



All packages ship using UPS. UPS will NOT deliver to a PO Box. UPS will not search for missing Suite, Apartment or Unit numbers and letters. The order will be returned to Aetna (or ODS) and will delay the delivery to the recipient.

The Contact Information will be auto populated with the agent login contact information updated in the Account Profile section.
When the order, address and contact information are correct click the Place Order button to submit.

# Post Checkout

## Confirmation



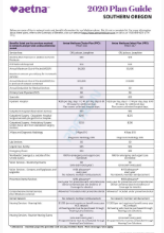The final Confirmation page will summarize the order items, quantities, and order status as well as the shipping address and any customization. There is a print function  to print details of the order. If selected, a print window will appear to print the details from.

There will be an email sent directly to the broker for each submitted order. Please make note of the Order # at the top of the confirm email as it will be referenced to monitor the order.

# Tracking Orders

Once the order is submitted the agent can go into the Order History to view the status of the order. Click the Account Profile  located in the top right corner of the application. Click on the Order History button  to view submitted orders listed chronologically by most recent date.



To view the details of an order, click the view icon  at the end of the desired row. There is no ability to edit the order when viewing. There is also a Copy button  to copy the same order details for a new order. Lastly, there is printer icon  when viewing the order details as needed. Use the  menu located on the top left of the order history list to move back one step to the Account Profile level.

## Tracking Shipments

When the order shows a 'Shipped' status the shipment can then be tracked. The tracking number can be used in the UPS website to check the status of the delivery. An email will be sent with the tracking number included for reference.

Clicking on Proof of Delivery on the UPS website will provide data on the shipment

| ORDER # | ORDERED DATE | ORDER STATUS | TRACKING | SHIPPED DATE | |
|---|---|---|---|---|---|
| A_072020201238 | 07/20/20 12:38 | Shipped | 012345678901234567 | 07/23/20 16:23 | 👁VIEW |

An email will be sent when the order has been shipped.

**♥aetna**™

## Order is Shipped

Your order #D1DID080UC has shipped    **TRACK PACKAGE**

Order#:  **D1DID080UC**
Order Date: 01/01/2020
Order Total: $160.00
Shipping:  USPS Standard

### Shipped Items

Shipping Details: ABC Healthcare | Henry Matisse <henry.matisse@gmail.com> | 555-555-5555 |
123 ABC Street Los Angeles, CA 90094 | Residential address |

| Code | Product | Quantity |
|---|---|---|
| 00.02.333.1 | Discount programs & service | 1 |
| 00.02.333.1 | Aetna Choice POS II Plan brochure | 1 |
| 00.02.333.1 | ACPOS/CHOICE | 1 |
| 00.02.333.1 | Benefits envelope 9 x 12 generic | 1 |

| | |
|---|---|
| Subtotal: | $60.00 |
| Shipping fee: | $20.00 |
| Tax fee: | $10.00 |
| Grand total | $90.00 |

You can track and manage your shipment using the Tracking number: **012345678901234567890**
Thank you for ordering with us.

# Account Profile Settings



The account profile settings reside in the top right corner of the application and is where the user will have access to order history, saved jobs, address book, as well as a change password and account details. Click on the Account Profile icon at the top of the page to access these available options.

Welcome, fsr002

♥aetna™

Need Help

MEDICARE INDIVIDUAL

🕐 Order History

🏠 Your Addresses

🛡 Change Password

👤 Account Detail

🕐 Saved Order

## Order History

🕐 Order History

Each user can view their order history. Click on the Order History button _____ to list the completed orders listed chronologically by most current order date.

Account / Order History

| ORDER # | RECIPIENT NAME | Start Date | End Date | 🔍 SEARCH | ☰ CLEAR |
|---|---|---|---|---|---|

| ORDER NUMBER | ESTIMATED DELIVERY DATE | PROGRAM | JOB TYPE | MARKET SEGMENT | COST CENTER | CUSTOMER | ORDER STATUS | |
|---|---|---|---|---|---|---|---|---|
| A10000048620166405093 08/26/20 20:26 | 09/03/20 | Medicare Individual | Pick & Pack | | 19086 | | Approved | ⊙ VIEW ⊞ COPY |
| A10000048620083264201 08/25/20 21:21 | 09/02/20 | Medicare Individual | Pick & Pack | | 19086 | | Approved | ⊙ VIEW ⊞ COPY |

To view the details of an order, click the view icon ⊙ VIEW at the end of the desired row.  There is no ability to edit the order when viewing.  There is also a Copy button ⊞ COPY to copy the same order details for a new order.  Lastly, there is printer icon 🖨 when viewing the order details as needed.  Use the Account / Order History menu located on the top left of the order history list to move back one step to the Account Profile level.

## Address Book

The user can view the address book under the account profile. First, click on the Your Addresses button ![Your Addresses button] to list the addresses saved to their profile.

**🏠 Your Addresses**

The pencil icon is available to edit and save any contact information. Use the back button within the browser to go back to the prior page.

| Title | Name | Addresses | + |
|-------|------|-----------|---|
| LAS VIRGENES RD | Q Vigil | 5666 LAS VIRGENES RD APT 648 CALABASAS CA 91302 | ✏️ |
| ODS Building 3 | Paul Becksmith | 12733 GINGER DR JACKSONVILLE FL 32223-1844 | ✏️ |
| Pittsburgh Warehouse | Sherlock Holmes | 221B BAKER DR PITTSBURGH PA 15237 | ✏️ |

To search for an address use the CTRL+F key to enable the find feature in the browser and type in a word to search.

## Change Password

**🛡 Change Password**

The user can directly change their password within ONEkit by clicking on the Change Password button _____. If the user forgot their password use the Forgot Password link located on the sign in window.

Current Password

Enter current password

New Password

Enter new password

Confirm New Password

Enter new password again

**SUBMIT**

## Account Detail



Update account profile details using the Account Detail button _____ and entering in profile information. Name, email and phone number will auto-fill. The Email Address field is where any email communication will be sent and should be kept updated.

| First Name | Last Name |
|---|---|
| Jane | Doe |

| Email Address | Phone |
|---|---|
| Jane.Doe@ods.com | - - |

| Address | Address 2 |
|---|---|
| 12655 Beatrice St. | Address 2 |

| City | State |
|---|---|
| Los Angeles | CA |

| Zip | Country |
|---|---|
| 90066 | United States |

SAVE

## Saved Order



To search and view any saved jobs, click on the Saved Order button _____ and click on Saved Edit. Saved Edit refers to jobs that have been customized and are awaiting to be completed and submitted for processing. The name can be customized when saving the job. Click on the Clock button  to return to the editing format to continue with the job order.

Account / Saved Order

SAVED ORDERS    SAVED EDIT

| Name | Saved On | |
|---|---|---|
| AJEPP drafted 7/11/2020 Paul Becksmith | 7/11/2020 | ↺ |

1-1 of 1    ‹    ›

# Customer Service

## Need Help Link

To reset the password, click on the Forgot Password link on the sign in window when first logging into the system. A generated email will be sent directly with a reset link included.

For support with placing an order please click the Need Help link Need Help ? at the top of all pages to submit an email with contact information and the reason for the support request.

## Help View

### We're Here To Help

Your satisfaction is important to us! Use the form below to email us your questions about products, online orders, store experiences and more.

☁ Download users Guide

Your Name: *
```
Your Name
Jane Doe
```

Your Email Address: *
```
Your Email Address
Jane.Doe@ods.com
```

Your Phone Number: *
```
Your Phone Number
9133333940:
```

Need for Support: *
```
Need for Support
Why can't I see a product available in my area          ▼
```

Comments or Questions: *
```
Comments or Questions
```

RESET          SUBMIT

## Turning Off Autofill in Chrome

1. Click the Chrome menu icon (three dots at top right of screen)
2. Click on Settings
3. Click on the Autofill section in the left navigation bar and expand the area (ex. Addresses and more) for which you wish to disable Autofill
4. Toggle the setting OFF if it is on.  The system will automatically save your settings

## Clearing Autofill Data in Chrome

1. Click the Chrome menu icon (three dots at top right of screen)
2. Click on History, then click on History again in the menu that appears
3. Select Clear browsing data
4. At the top, choose Time range 'All time' option to clear all saved data
5. Make sure that the 'Autofill form data' checkbox is checked
6. Click Clear Data button