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Please contact our Support Team at support@AHIPInsuranceEducation.org or 800-509-4422, if you have any additional questions about AHIP’s online training platform.
PDA Account Registration

On America’s Health Insurance Plans website (www.AHIP.org/courses), Click Register and submit your information. Please note the fields marked with a red asterisk are mandatory. If you are affiliated with a particular company, type in the first three letters of the company name, and choose your company, branch, or department name from the drop-down menu. Create a username and password and Click Register.
PDA Account Registration Continued

Your account has been created. Click on the **Click Here to Login** button to log in to your account.

Once you have created an account, e-mail support@AHIPInsuranceEducation.org and we will create a PDA role for you in the system.

Note: To enroll yourself in a course, refer to the **Student Enrollment Instructions**.
Logging Into Your Account

When logging in, enter your **Username** and **Password** into the required fields.
Employee Account Registration and Course Enrollment

As a PDA, you can create an account for an employee. Alternatively, employees can register and add themselves to your group by selecting the same branch from the drop-down menu during registration. To create a new user, Click on My Learning from the right-hand side of the main menu, and Click Create New User. Please note the fields marked with a red asterisk are mandatory. Please verify the Company Name to make sure employee is added to your group. Create a username and password, and Click Register.

Note: In the unlikely event that an employee has been registered in the system but was not correctly added to your group, please e-mail support@AHIPInsuranceEducation.org, and a representative will link the employee to your group, so they show up under Team.
Employee Course Enrollment/Book Purchases

You can purchase courses from the My Dashboard screen by selecting shortcuts to the **Shopping Cart**, the **Quick Catalog** browser or from the **Catalog** tab under the main menu. NOTE: When browsing, click the plus sign beside the course header to expand to **Courses** and **Books** and then expand the appropriate item. If the course type reads **Textbook Required**, please be sure to go to the **Books** category and purchase the associated textbook. Locate the course you want and select the **Purchase for Employee** option. For this example, we will select the An Introduction to Wellness Programs.
Employee Course Enrollment/Book Purchases Continued

Check the box next to all the employees you wish to enroll, and Click **Submit** to add their enrollments to your shopping cart.
Employee Course Enrollment/Book Purchases Continued

Select **Add to Cart**
Employee Course Enrollment/Book Purchases Continued

Notice the different options on this page. You can Continue Shopping, Remove items, Update Cart, change Quantity, Save for Later or Proceed to Checkout. All items you choose to Save for Later will be listed under the My Learning tab. For this example, we will select Proceed to Checkout to purchase An Introduction to Wellness Programs.
Employee Course Enrollment/Book Purchases Continued

Confirm the billing address (the address on file with the credit card you will be using to make the purchase) and, if you are ordering a book, the shipping address and shipping method. If the shipping address is the same as the billing address, Click **Copy from Billing Address** once you have entered your billing information.
Employee Course Enrollment/Book Purchases Continued

You should verify the information on the Summary Page is correct. If you have a coupon or transfer token code, you will need to type it in the Coupon Code or Token Code fields. Click Next.
Employee Course Enrollment/Book Purchases Continued

Choose the **Payment Option**. If paying by credit card, enter the credit card information without any spaces or dashes, and click **Complete Purchase**. If your company has a billing method in place, choose **Bill Me or Debit** under the Payment Option field. You have now purchased the course.
Learning Plan

As a PDA you can opt to have AHIP assign a learning plan to your student's account. For instance, if you wanted everyone new to your organization to take Health Insurance 101: An Orientation as a requirement we would assign this course to their learning plan. The student will either see the option to Purchase/Enroll. You will need to request this from our Support Team.
Designation Enrollment for Employees

This exciting new feature will allow you to enroll your employees in a designation program and track their progress. From the main menu Click on Catalog, and then Click on Browse.
Designation Enrollment for Employees Continued

Click on Designations located under the Products By Type tab.
Designation Enrollment for Employees Continued

Select the Designation, and Click on Enroll Employee. For this example, we will select the Managed Healthcare Professional Designation.
Designation Enrollment for Employees Continued

Check the box next to all the employees you wish to enroll into the designation, and Click **Submit** to add their enrollments to your shopping cart.
Designation Enrollment for Employees Continued

Confirm enrollment by Clicking on **Enroll Now**.

![Managed Healthcare Professional Enrollment Details]

- **Title**: [Managed Healthcare Professional]
- **Type**: [Designation]
- **Required Approvers**: [None]
- **Your reason for enrolling employee**: [No reason]

[Buttons: Cancel, Enroll Now]
Designation Enrollment for Employees Continued

You will see a list of all Mandatory Courses, Elective Course, and Credit Requirements if applicable. Click Next.
Designation Enrollment for Employees Continued

A confirmation of the employee’s enrollment will display. The employee is now enrolled into the designation. The PDA or student will still have to purchase all courses associated with this designation.
My Team

To check an employee’s record and make any necessary modifications, click My Learning, and, in the drop-down menu, click Team. The shortcut to this menu is on the left-hand side. Your employees will be listed under their respective group headings (if you manage more than one branch, each group will be listed separately). To make changes to the employee’s personal information, Click on User Profile. To view their current course enrollments, Click on Current Activities. To see all of the employees completed courses, Click on Training History. To view company required courses, Click on their Learning Plan.
E-mail

Click E-mail and then My Inbox to view your messages. Messages such as course completions and testing notification will come here. Your employees can also send you messages. Additionally, any approvals for purchases by your employees will be sent to this tab as well as to your e-mail address on file. You can send and receive emails through the E-mail tab. The shortcut to this menu is on the left-hand side. There will be a red flag to alert you of any unread messages.
E-commerce/Debit Account

To view your Debit account, Click E-commerce on the right-hand side of the main menu, then Click Account Summary and Click the account name under Available Accounts.

If the only option available for you is Credit Card, then you will not see anything under this tab. All of your transactions will be listed under Purchase History.
E-commerce/Debit Account Continued

Under your Debit account, you will see a list of purchases and the remaining balance. Click the Total Transaction Amount button for more details.
E-commerce/Debit Account Continued

All purchases including transaction date, costs, and username will be listed.
E-commerce/Bill Me Account

To view your Bill Me account, Click E-commerce on the right-hand side of the main menu, then Click Account Summary and Click the account name under Available Accounts.

If the only option available for you is Credit Card, then you will not see anything under this tab. All of your transactions will be listed under Purchase History.
E-commerce/Bill Me Account Continued

Click the **Invoice Number** hyperlink for more details.

<table>
<thead>
<tr>
<th>Invoice Number</th>
<th>Invoice Date</th>
<th>Invoice Amount</th>
<th>Paid Amount</th>
<th>Credit Amount</th>
<th>Balance</th>
</tr>
</thead>
<tbody>
<tr>
<td>INV0011151</td>
<td>10/12/2014</td>
<td>$350.00</td>
<td>$200.00</td>
<td>$0.00</td>
<td>$150.00</td>
</tr>
<tr>
<td>INV0011152</td>
<td>10/14/2014</td>
<td>$350.00</td>
<td>$0.00</td>
<td>$0.00</td>
<td>$350.00</td>
</tr>
</tbody>
</table>

Outstanding Balance $350.00
E-commerce/Bill Me Account Continued

All purchases including transaction date, costs, and username will be listed.
Approvals

When employees choose to bill a company or use the company’s debit account, these purchases must be approved by the PDA before the employee will be enrolled. To view outstanding approvals and approve purchases, click on the checkmark tab (red flag) located on the left-hand side of the shortcut menu.
Approvals Continued

You will see a list of any transactions you or your employees have made. To approve or reject a transaction, click Approve or Reject. You can approve or reject one or more request at a time. If you reject a request, you are prompted to supply a reason for the rejection, and this will be visible to the student.
Catalog

Select Catalog from the main menu, and Click Browse. You are now able to browse the Catalog by Topic, by Type or SEE ALL ITEMS.
Launch Reports

Click the main menu, and then Click on Launch Reports.

Running a Class Report will tell you which of your employees has taken a class or classes or earned a certain designation.

Select the branch for which you want to run a report. Choose Class or Designation. Choose All Classes or select the specific classes from the list and Click Add.

Select a Class Status. The most efficient report is All, but you can sort employees by those who have Completed the course (either passing or failing), those who are In Progress (have accessed some material, but not completed the exam), and those who are Not Started (enrolled but have not accessed any course material).

Select a Date Filter. You can search for employees in a date range either by when they were Enrolled in a course or when they Completed the course. Click Apply after you have selected the filters.
Launch Reports Continued

After you click **Apply**, the report will generate directly on your screen. You can filter each column by right-clicking on each heading. You have the option to save the file as an Excel, CSV, PDF, or Word document by selecting the second save icon.