PROFESSIONAL DEVELOPMENT ADVISOR (PDA)

USER GUIDE
Contents

PDA Account Registration ........................................................................................................3
PDA Account Registration Continued ................................................................................4
Logging Into Your Account ...................................................................................................5
Is My Browser Supported? ....................................................................................................6
Employee Account Registration and Course Enrollment ..................................................7
Employee Course Enrollment/Book Purchases .....................................................................8
Employee Course Enrollment/Book Purchases Continued ...............................................9
Employee Course Enrollment/Book Purchases Continued ..............................................10
Course Transfer ..................................................................................................................11
Designation Enrollment for Employees ..............................................................................12
Designation Enrollment for Employees Continued ...........................................................13
My Team ...............................................................................................................................14
E-mail ..................................................................................................................................15
Debit Account ......................................................................................................................16
Pay by Invoice ......................................................................................................................17
Approvals ............................................................................................................................17
Catalog .................................................................................................................................18
Launch Reports ....................................................................................................................19
Launch Reports Continued .................................................................................................20
PDA Account Registration

On America’s Health Insurance Plans website (https://www.ahip.org/insurance-education/), Click Create An Account And Enroll, and submit your information. If you are affiliated with a company, type in the first three letters of the company name, and choose the name from the drop-down menu. Create a username and password and Click Register.

Please Note: The fields marked with a red asterisk (*) are mandatory.
PDA Account Registration Continued

Your account has been created. You will be redirected to the sign in page. Click on the Sign In 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.

Please 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.

SIGN IN

Username

Username

Password

Password

Sign in

Is My Browser Supported?
Is My Browser Supported?

Users can see if their current browsers supported by the LMS. To check your browser’s compatibility by Clicking **Is My Browser Supported?** on the Sign In screen. This will launch the LMS Browser Compatibility Test.

![LMS Browser Compatibility Test]

- **Web Browser & OS**
  - You are running Chrome 81.0.4044.138 on Windows 10 64-bit.

- **Pop-up Blocker**
  - Pop-up Blocker is disabled for this site.

- **Adobe Flash Plugin**
  - Adobe Flash Player plug-in enabled.
  - This may be required by some eLearning Courses.

- **Cookies**
  - Cookies are enabled.

- **Misc Modern Browser Support Features**
  - If your browser does not pass these supported HTML & CSS feature checks expected of a modern web browser, your LMS experience may be affected.

Learn More •
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 company name from the drop-down menu during registration. To create a new user, click on the Main Menu, and click Create New User. Fields marked with a red asterisk are required. Please verify the Company Name to make sure employee is added to your group. Create a username and password and Click Register.

Please 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 via our catalog. From the Home page by Clicking Browse Catalog. You will be redirected to the course catalog. Locate the course you want and select the Purchase for Employee option. For this example, we will select the Accountable Care Organizations (ACOs).

Please Note: If the course type reads Textbook Required, please be sure to go to the Book category and purchase the associated textbook.
Employee Course Enrollment/Book Purchases Continued

First, select your group then check the box next to all the employees you wish to enroll and Click **Submit** to add their enrollments to your shopping cart.

Notice the different options on this page. You can **Remove** items, **Save for Later** or **Secure 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 Accountable Care Organizations (ACOs).
Employee Course Enrollment/Book Purchases Continued

Confirm the billing address. If you are ordering a book, you will also need to confirm the shipping address and shipping method.

You should verify the information on the page is correct. If you have a coupon code, you will need to type it in the Coupon Code field. Enter the Payment Information. Click Pay.
Course Transfer

You may transfer your course at any time during your enrollment period, as long as you have not accessed the final exam. If you have taken the exam already, you will not be eligible to transfer your course and will have to complete the exam in the enrollment period or purchase the course again for a new enrollment period.

To transfer a course, fill out a Transfer Request Form located at https://www.ahip.org/course-transfer-instructions/. The fee for transfers is $25 per course and will be paid at re-registration. The transfer request must be submitted before the end of your enrollment period. Once the transfer request is processed, you will be assigned a token number via email with instructions which you will need to use to re-register for the course. The token is NOT transferable or extendable. It is only valid for the specific course and user requested and must be used by the token’s expiration date.

To use the token, add the course to your shopping cart. On the items tab you will be prompted to insert your token code under the course’s amount. Complete the billing and payment information and Click Secure Payment.
Designation Enrollment for Employees

This feature will allow you to enroll your employees in a designation program and track their progress. Select the Search Catalog and Filter by Activity Type Designation. Select the Designation and Click on Choose Designation Path for Employee. For this example, we will select the Professional, Academy for Healthcare Management.

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

Review your **Shopping Cart** and **Billing** information. Click **Pay**.

<table>
<thead>
<tr>
<th>YOUR ITEMS</th>
<th>Qty</th>
<th>Amount</th>
</tr>
</thead>
</table>
| Professional, Academy for Healthcare Management  
  **Purchasing for Tester Tester**  
  **Shrink 101** | 1   | $0.00 |

| BILLING | Address Line 1:  
  1323 Test Avenue  
  Tester  
  Tapestry District of Columbia  
  11132  
  United States | Address Line 2 | Address Line 3 | City | State | Zip |
<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
<td>Tester</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**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.**

**Thank you for your order!**

Please review the details of your order below.

You will receive an email confirmation shortly at Tester@Test.com

- Return to homepage
- Go to your Learning Center

ORDER DETAILS

<table>
<thead>
<tr>
<th>Order Number:</th>
<th>12345678901234</th>
<th>Completed Date:</th>
<th>01/31/2022</th>
</tr>
</thead>
</table>
| Method of Payment: | None | Billed To: | Tester Account  
  1323 Test Avenue  
  Tapestry  
  District of Columbia  
  11132  
  United States |

YOUR ITEMS

<table>
<thead>
<tr>
<th>Qty</th>
<th>Title</th>
<th>Amount</th>
</tr>
</thead>
</table>
| 1   | Professional, Academy for Healthcare Management  
  **Purchasing for Tester Tester** | $0.00  
  **Shrink 101** |
My Team

To check an employee’s record and make any necessary modifications, go your **My Team Dashboard**. The shortcut to this menu is on the left-hand side. Your employees will be listed under their respective group headings. To make changes to the employee's personal information, Click on **Edit User**, using the drop-down menu under **Current Learning**. To view their current course enrollments, Click on **Current Learning**. To see all the employees completed courses, Click on **Completed Learning**.
E-mail

Click **Message** icon to view your messages. Messages such as course completions and testing notifications 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 the pending approval tab. You can send and receive emails through the **Message** 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.
Debit Account

To view your Debit account, Click Ecommerce on the right-hand side of the main menu, then Click Account Summary. From here, you will select your assigned account and you will see a list of purchases and the remaining balance. Click the **Include Transactions** button for more details. All purchases including transaction date, costs, and username will be listed.

<table>
<thead>
<tr>
<th>Date</th>
<th>Debit Amount</th>
<th>Credit Amount</th>
<th>Balance</th>
</tr>
</thead>
<tbody>
<tr>
<td>10/10/2013</td>
<td>$300.00</td>
<td></td>
<td>$300.00</td>
</tr>
<tr>
<td>11/11/2014</td>
<td>$100.00</td>
<td></td>
<td>$200.00</td>
</tr>
<tr>
<td>02/06/2015</td>
<td>$200.00</td>
<td></td>
<td>$400.00</td>
</tr>
<tr>
<td>03/11/2015</td>
<td>$500.00</td>
<td></td>
<td>$900.00</td>
</tr>
<tr>
<td>02/02/2015</td>
<td>$250.00</td>
<td></td>
<td>$650.00</td>
</tr>
<tr>
<td>02/20/2015</td>
<td>$250.00</td>
<td></td>
<td>$400.00</td>
</tr>
<tr>
<td>02/22/2015</td>
<td>$250.00</td>
<td></td>
<td>$150.00</td>
</tr>
<tr>
<td>02/20/2015</td>
<td>$250.00</td>
<td></td>
<td>$0.00</td>
</tr>
<tr>
<td>02/20/2015</td>
<td>$250.00</td>
<td></td>
<td>$950.00</td>
</tr>
<tr>
<td>02/20/2015</td>
<td>$250.00</td>
<td></td>
<td>$2450.00</td>
</tr>
</tbody>
</table>
Pay by Invoice

Groups may opt to receive invoices for the courses purchased by their employees. Students will be able to purchase courses using the Pay by Invoice option.

Approvals

When employees choose to bill a company (use the company’s Pay by Invoice 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 Pending Approval icon located on the shortcut menu. Select the transaction that 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.
Catalog

Select the magnifying glass next to **Search Catalog** from the Learning Center. 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.

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.