PROFESSIONAL DEVELOPMENT ADVISOR (PDA) USER GUIDE

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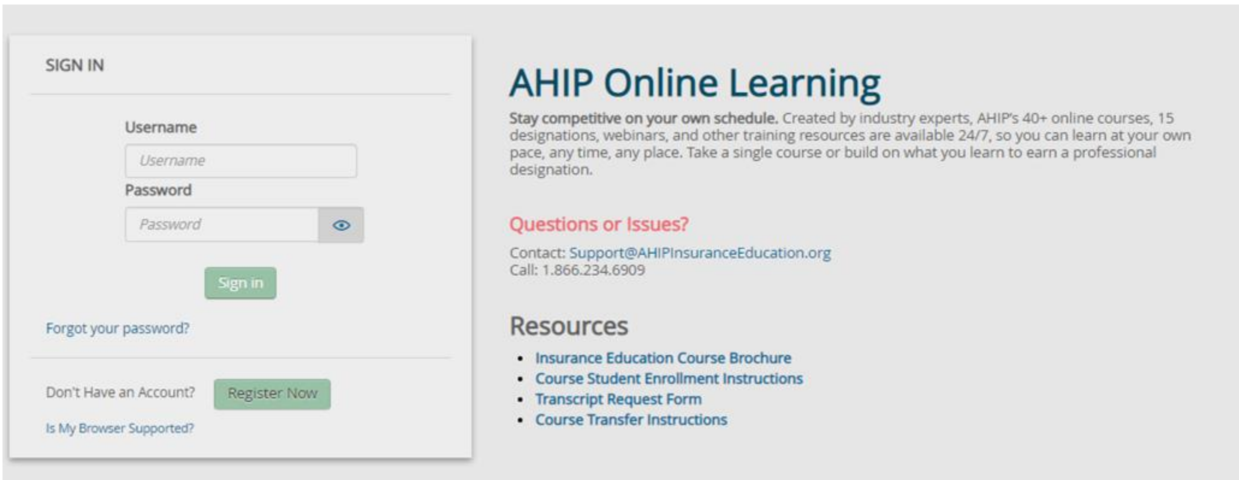
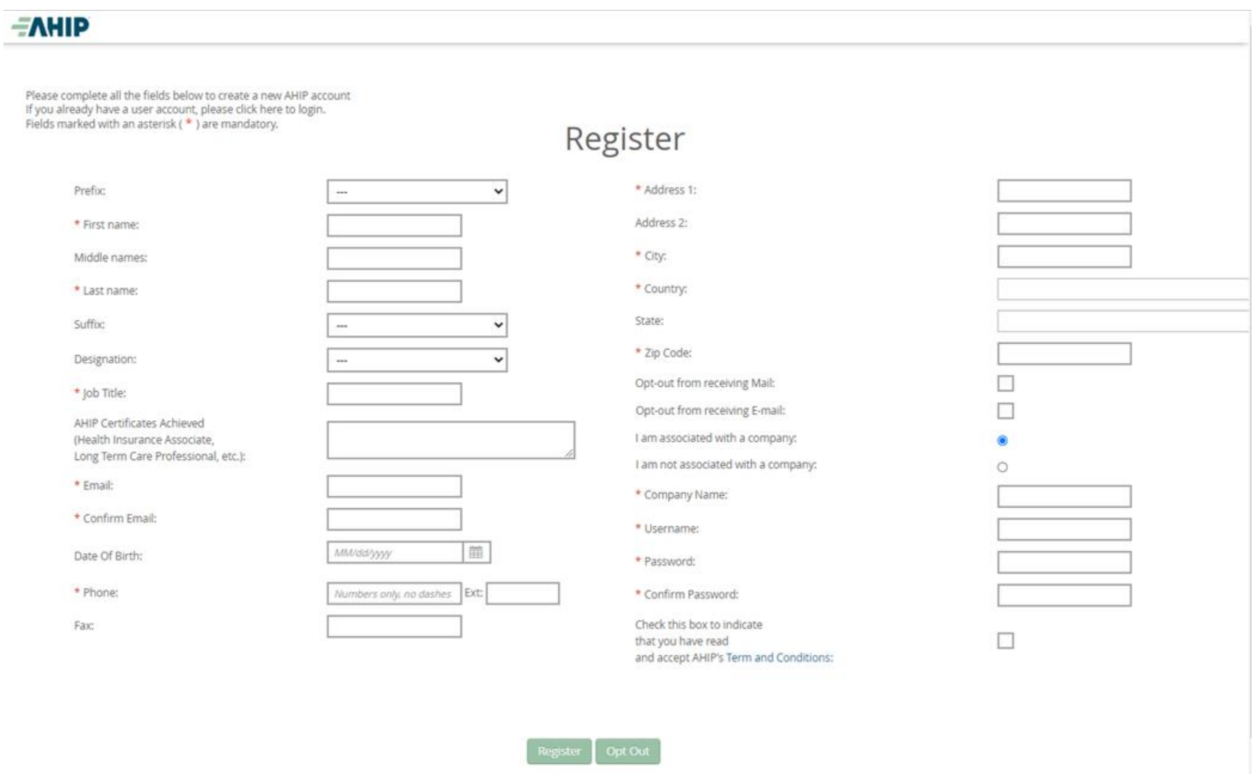
Please contact our Support Team at support@AHIPInsuranceEducation.org or 1-866-234-6909 if you have any additional questions about AHIP's online training platform.

PDA Account Registration

On America's Health Insurance Plans website (https://topclass.ahipinsuranceeducation.org/), Click **Register Now**, and submit your information. If you are affiliated with a 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**.

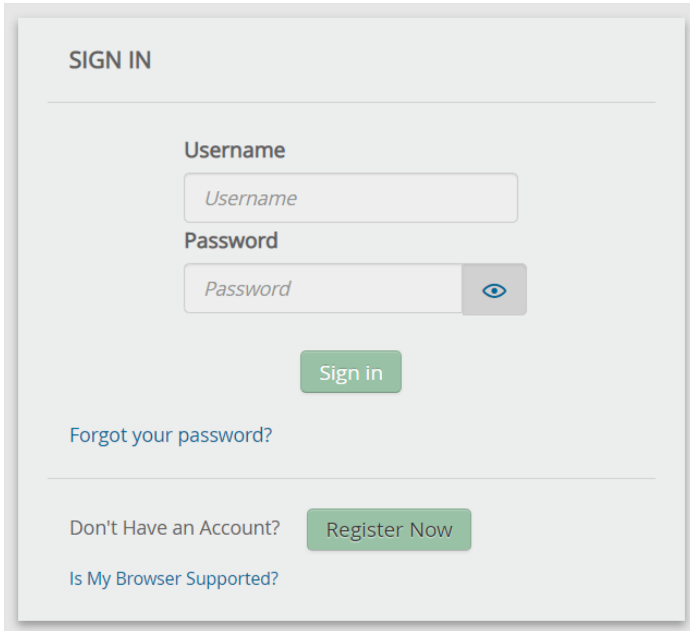
Please Note: The fields marked with a red asterisk (*) are mandatory.





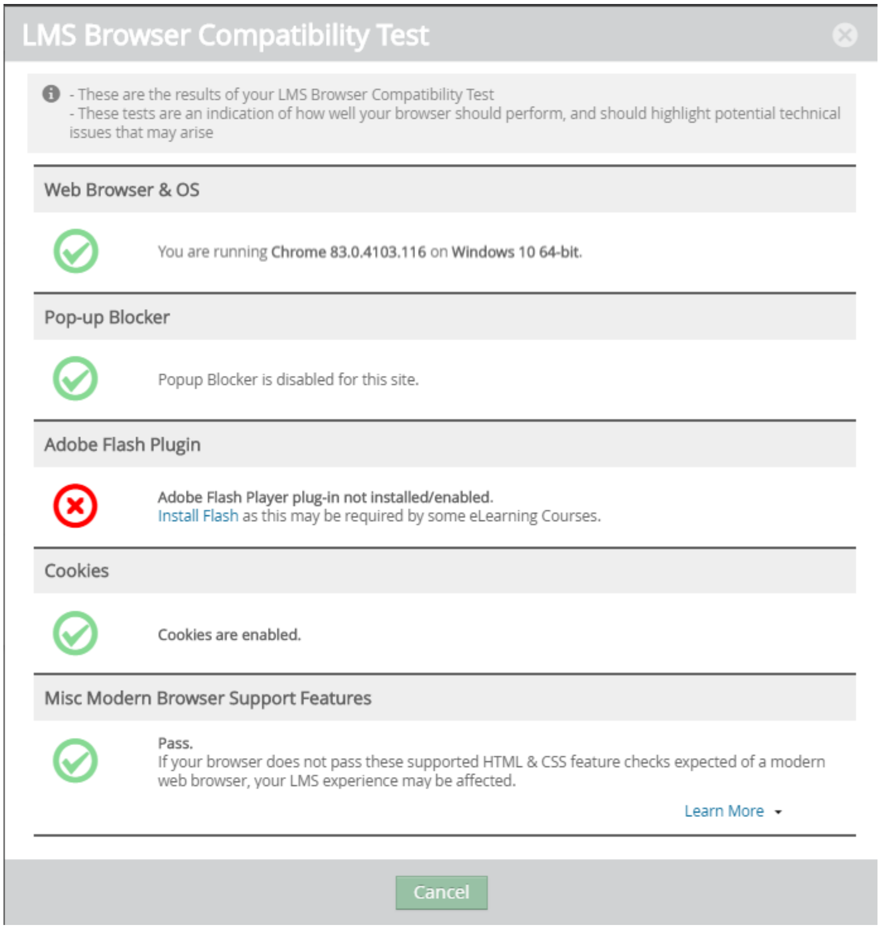
Logging Into Your Account

When logging in, enter your **Username** and **Password** into the required fields.



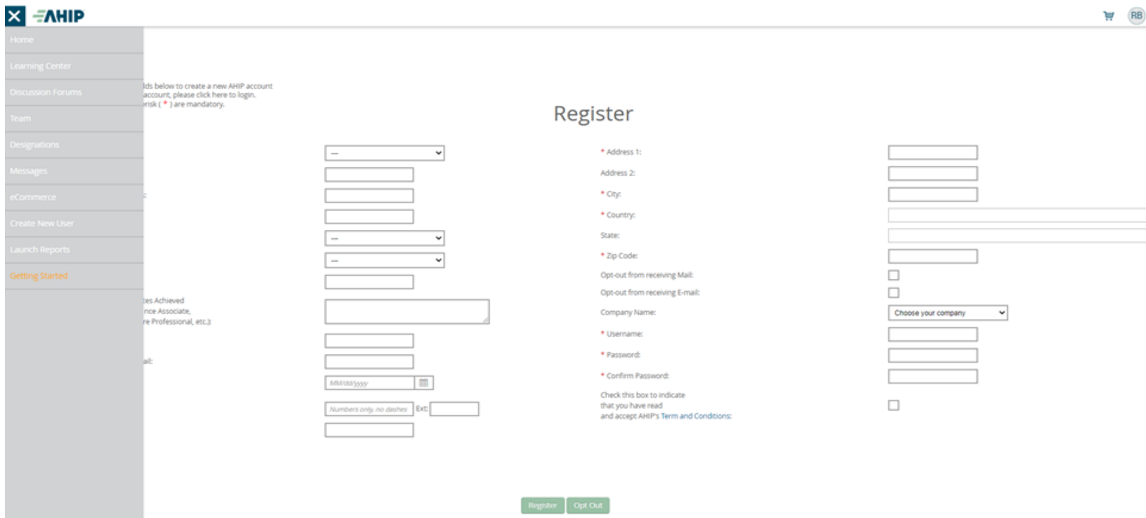
Is My Browser Supported?

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.



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 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**.

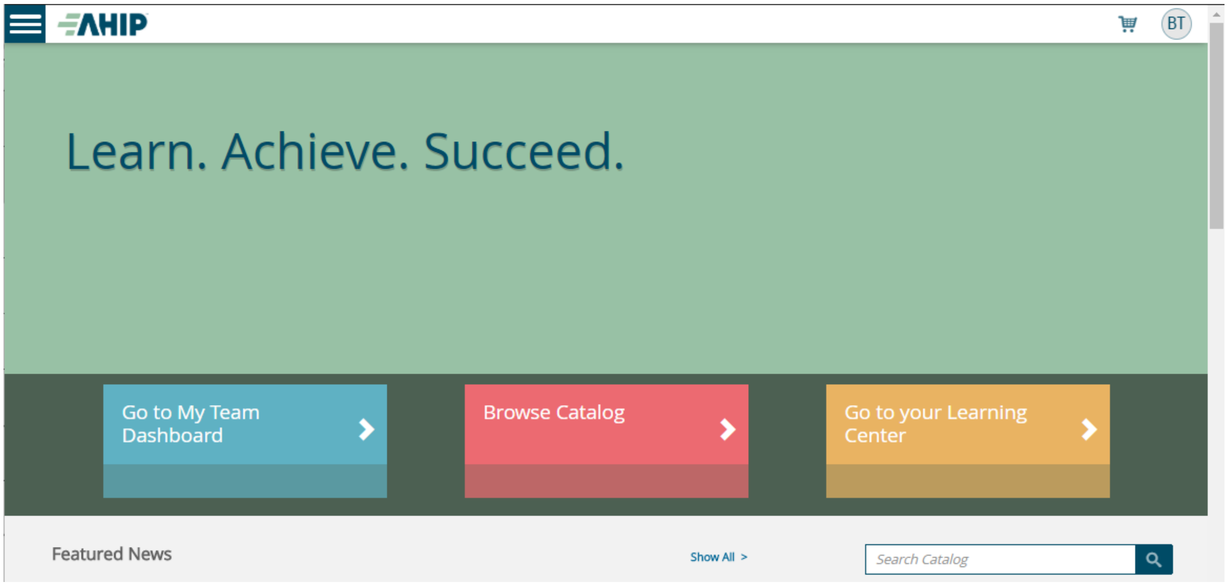
Main Menu

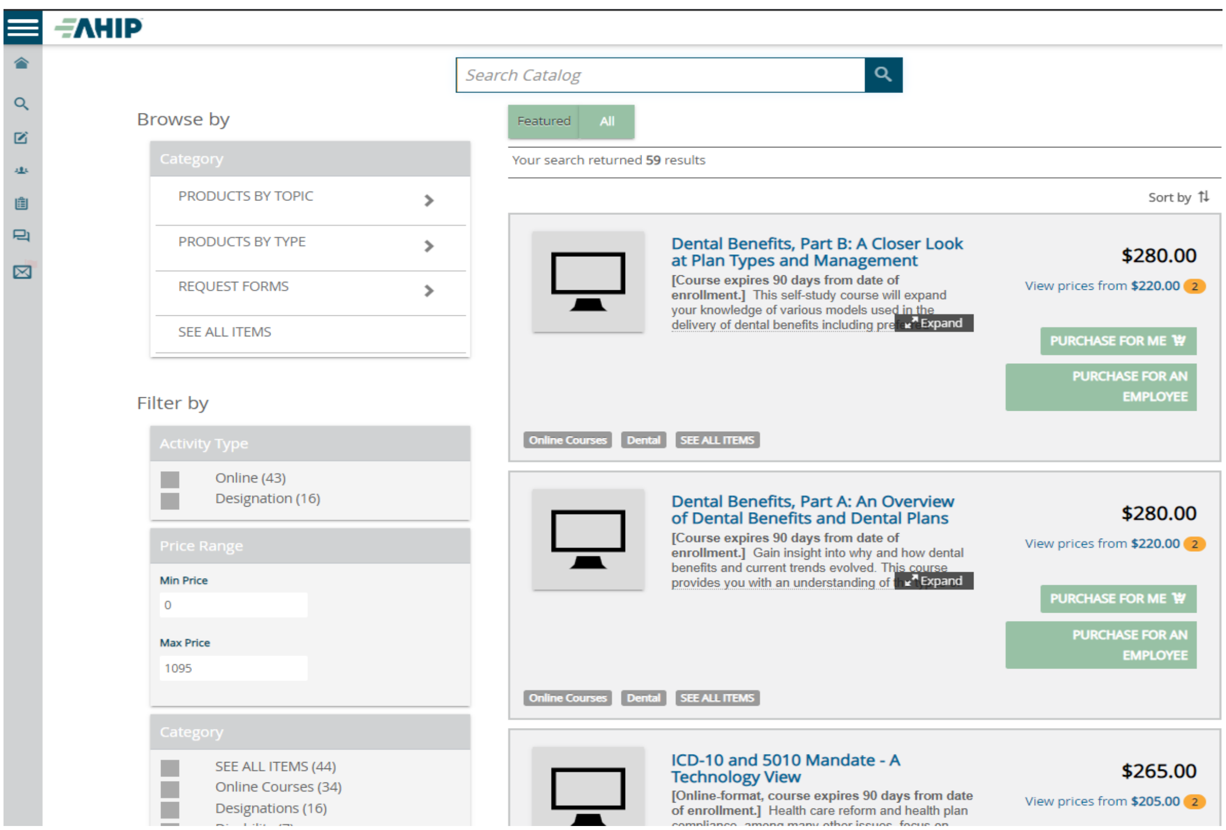


Please Note: In the unlikely event that an employee has been registered in the system but was not correctly added to your group, please e-mail support@AHIPInsuranceEducation.org, and a representative will link the employee to your group, so they show up under **Team**.

Employee Course Enrollment

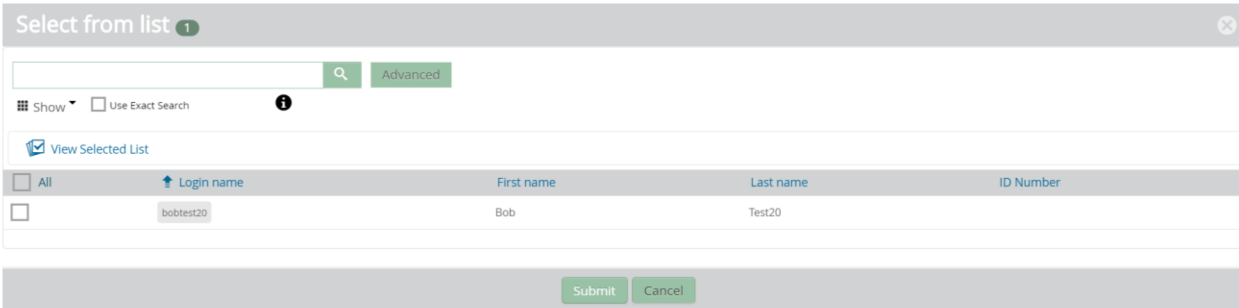
You can purchase courses from via our catalog. From the **Home** page by Click **Browse Catalog**. You will be redirected to the course catalog. Locate the course you want and select the **Purchase for Employee** option. For this example, we will select the Accountable Care Organizations (ACOs).



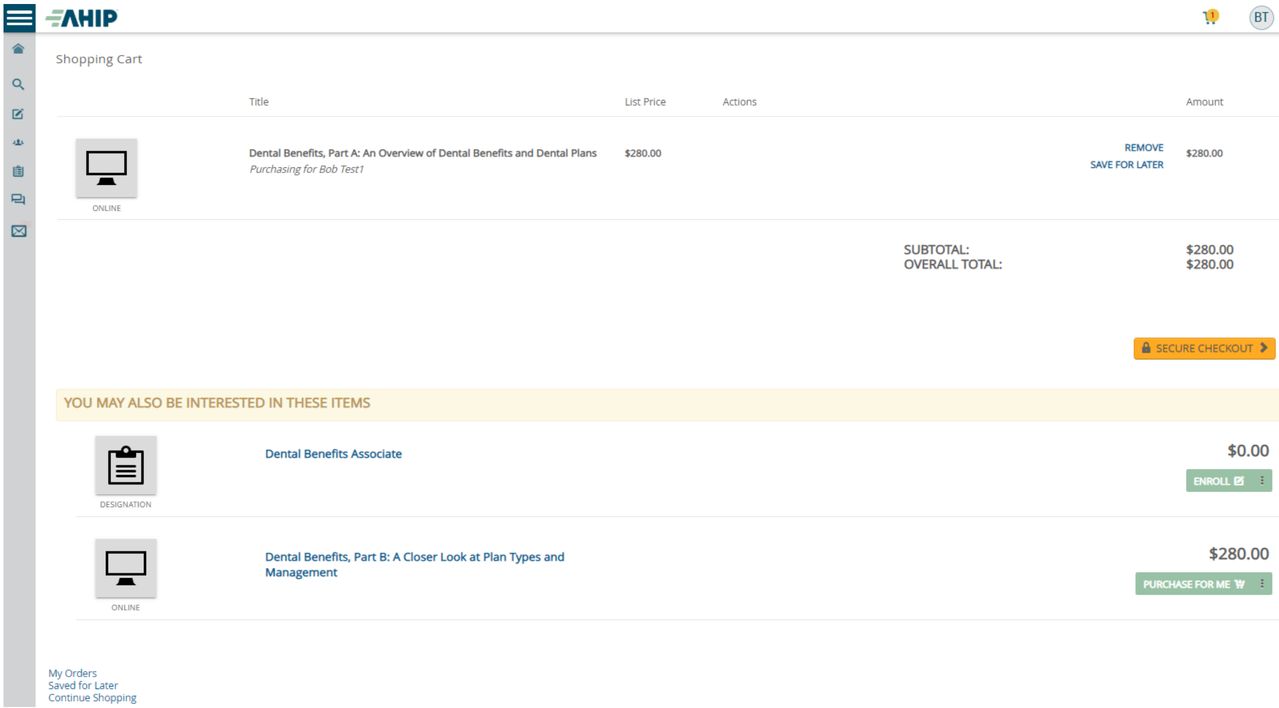


Employee Course Enrollment Continued

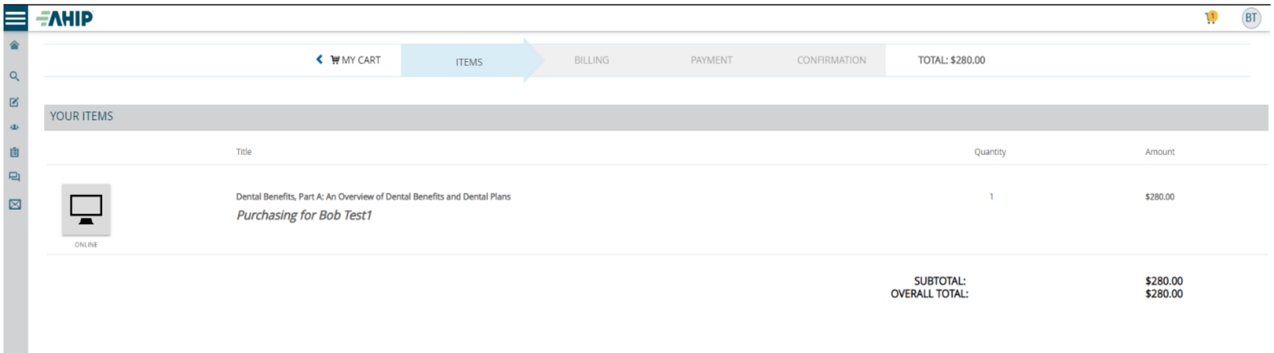
First, select your group then check the box next to all the employees you wish to enroll and Click **Submit** to add their enrollments to your shopping cart.

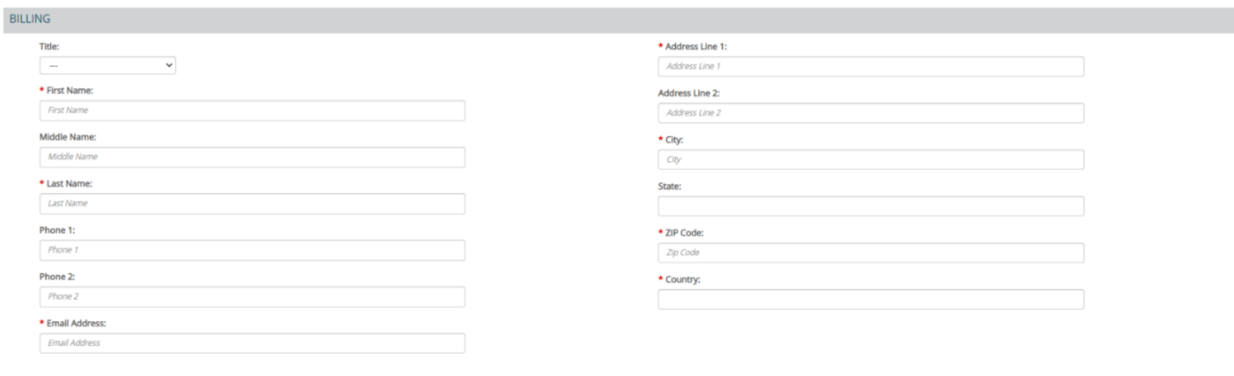


Notice the different options on this page. You can **Remove** items, **Save for Later** or **Secure Checkout**. All items you choose to **Save for Later** will be listed under the **My Learning** tab. For this example, we will select **Proceed to Checkout** to purchase Accountable Care Organizations (ACOs).



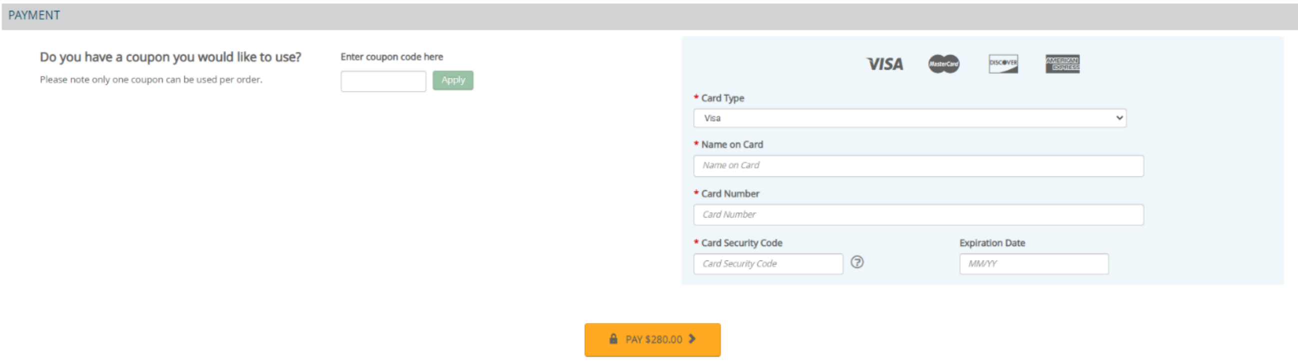
Confirm the billing address (the address on file with the credit card you will be using to make the purchase) and, if you are ordering a book, the shipping address and shipping method.





Employee Course Enrollment Continued

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

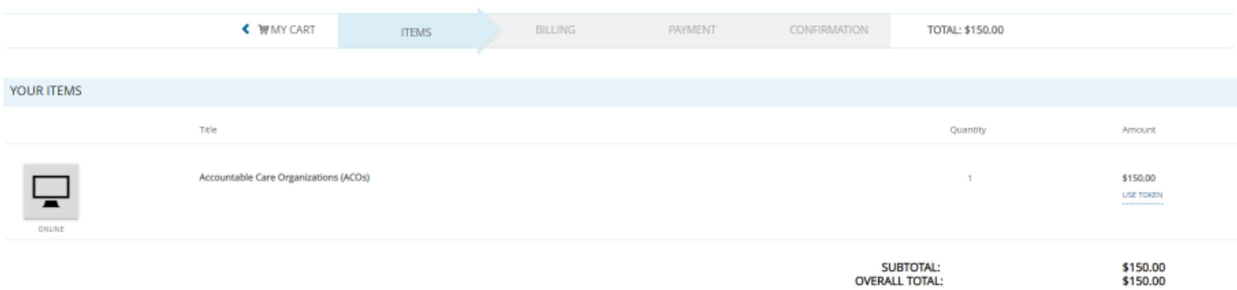


Course Transfer

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/transcript-request-forms 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 supply the billing and payment information and Click Secure Payment.

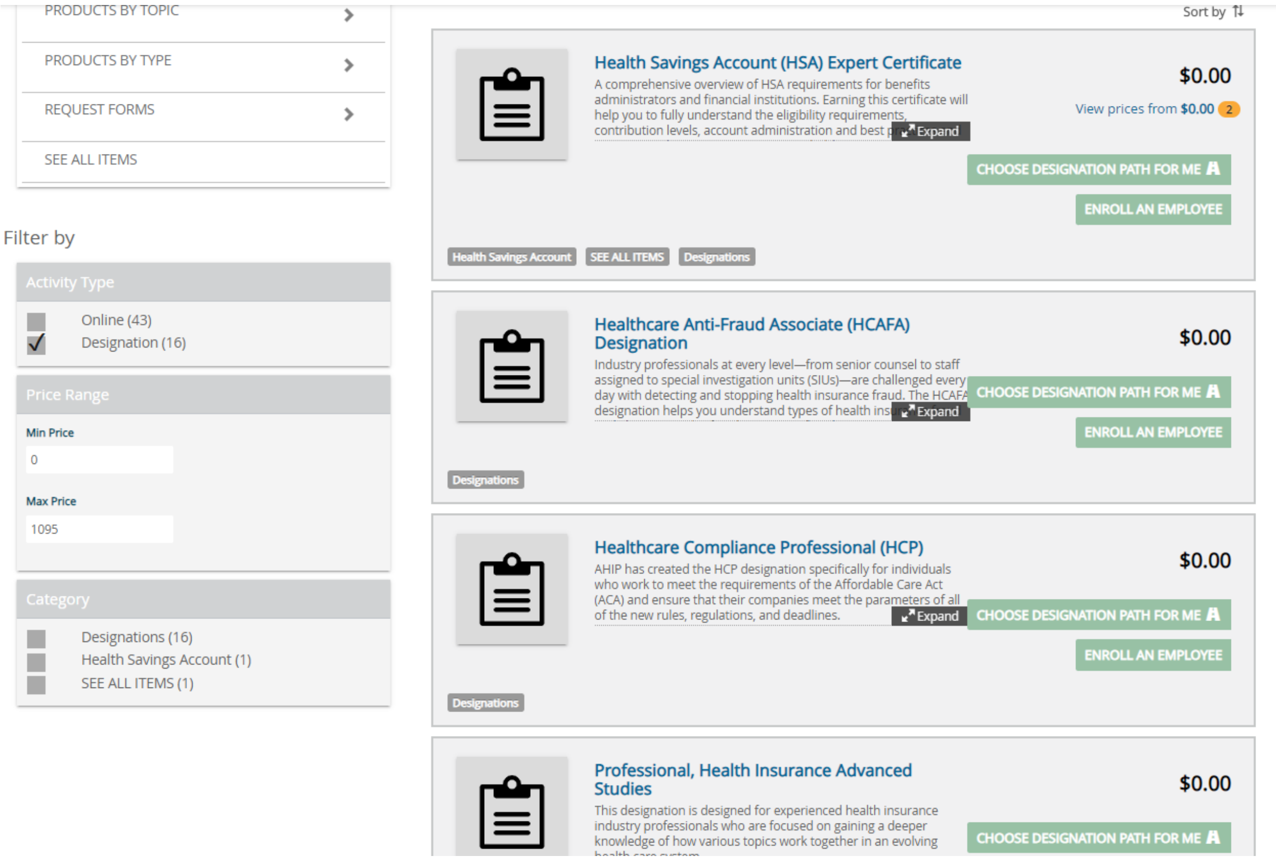


Learning Plan

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. Please reach out to our Support Team via e-mail support@AHIPInsuranceEducation.org and we will help assign this learning plan to your employees.

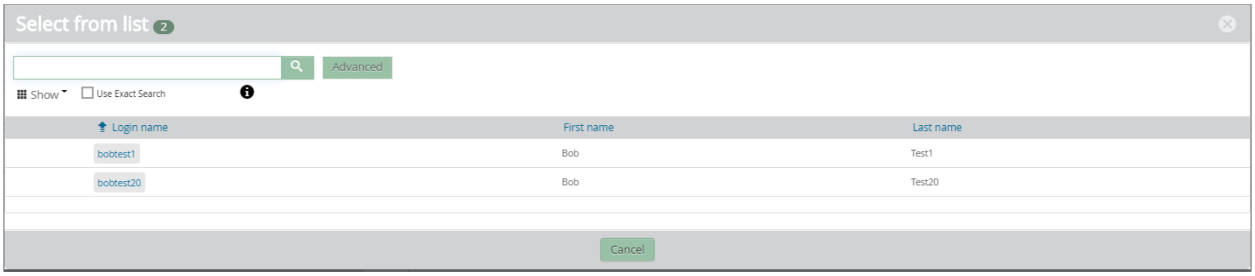
Designation Enrollment for Employees

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



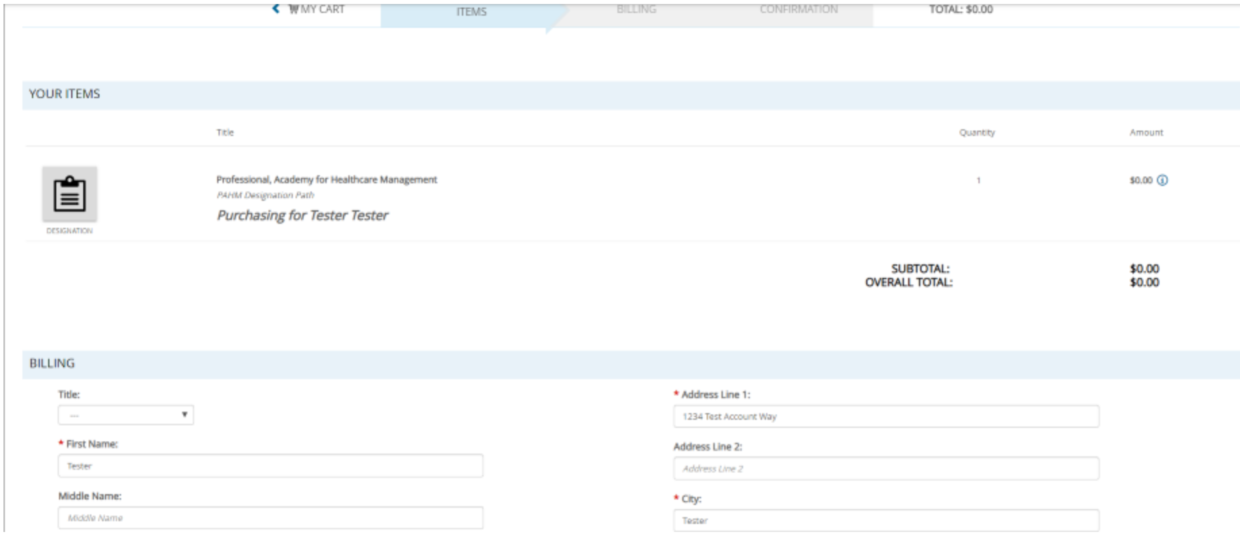
Designation Enrollment for Employees Continued

First select the **Group** and then 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.



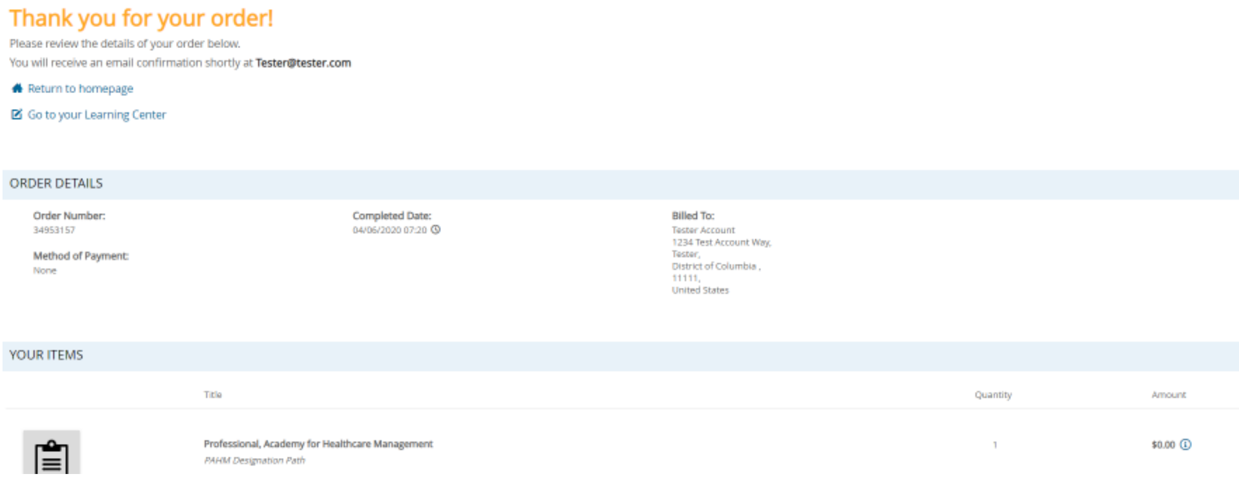
Designation Enrollment for Employees Continued

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



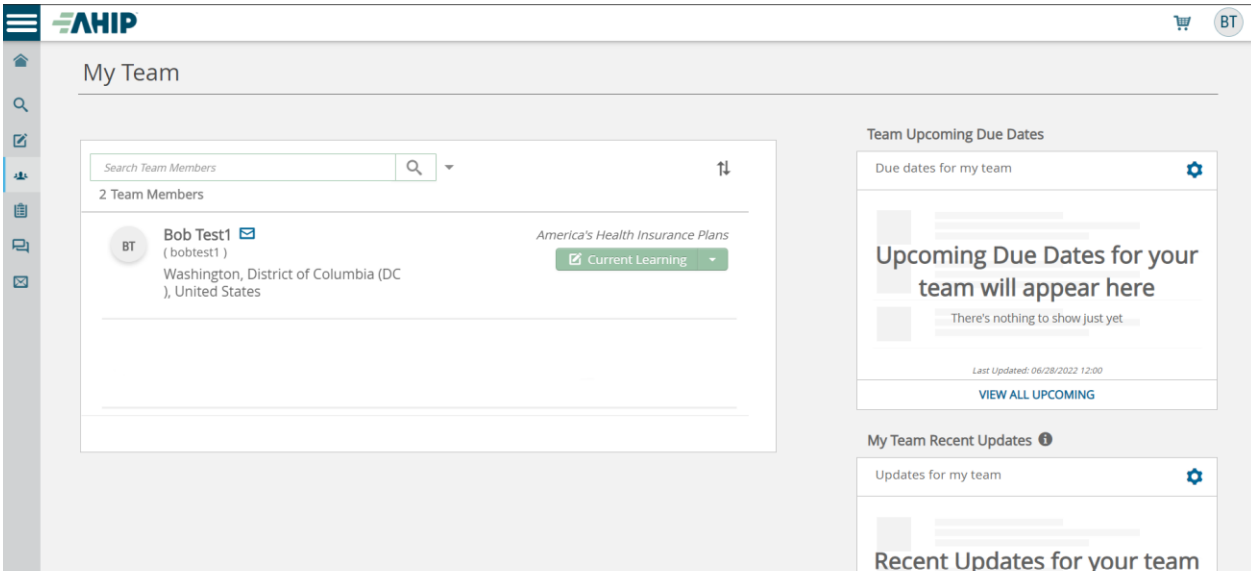
Designation Enrollment for Employees Continued

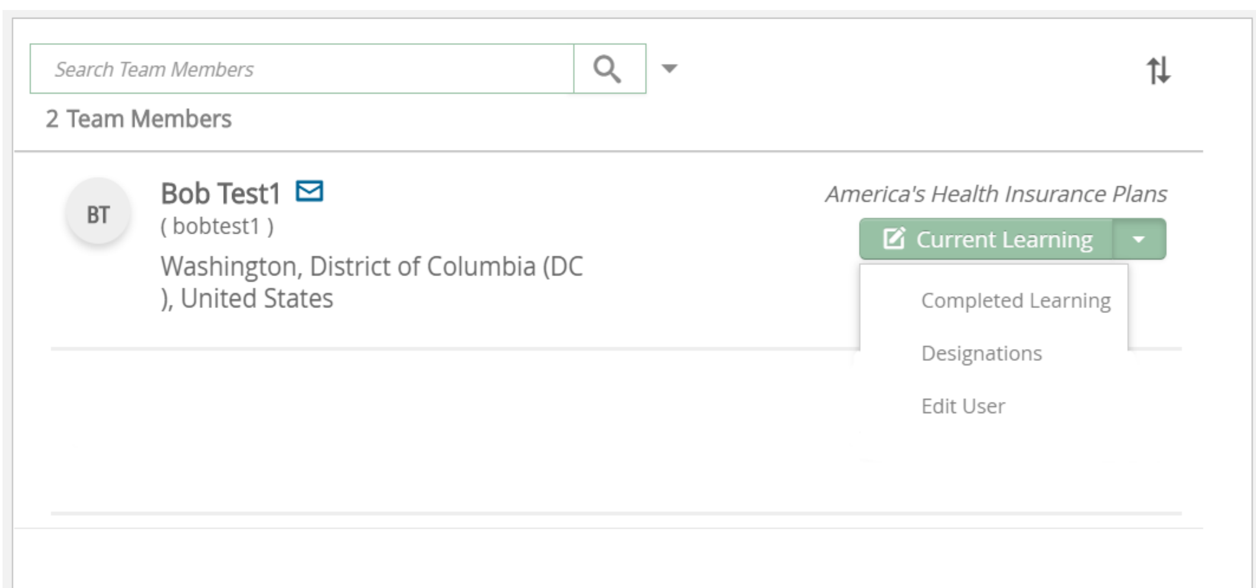
A confirmation of the employee's enrollment will display. The employee is now enrolled into the designation. The PDA or student will still have to purchase all courses associated with this designation.



My Team

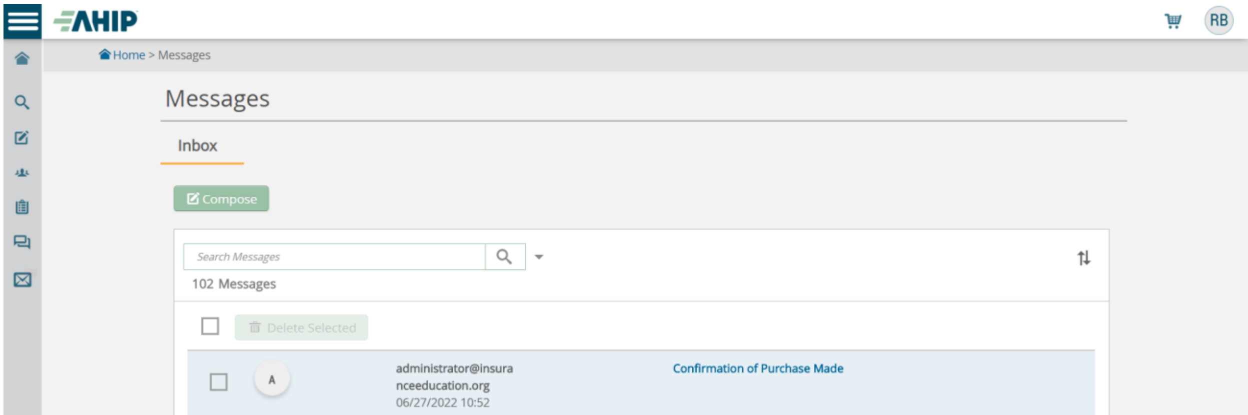
To check an employee's record and make any necessary modifications, click **Team.** The shortcut to this menu is on the left-hand side. Your employees will be listed under their respective group headings. To make changes to the employee's personal information, Click on **Edit User**, using the drop-down 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 **E-mail** icon 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.



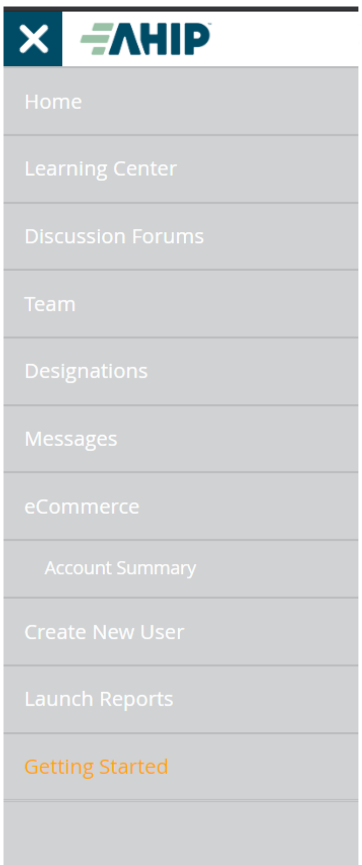
Debit Account

To view your **Debit** account, Click **ecommerce** on the right-hand side of the main menu, then Click **Account Summary.** You will see a list of purchases and the remaining balance. Click the **Total Transaction Amount** button for more details. All purchases including transaction date, costs, and username will be listed.

Account Summary

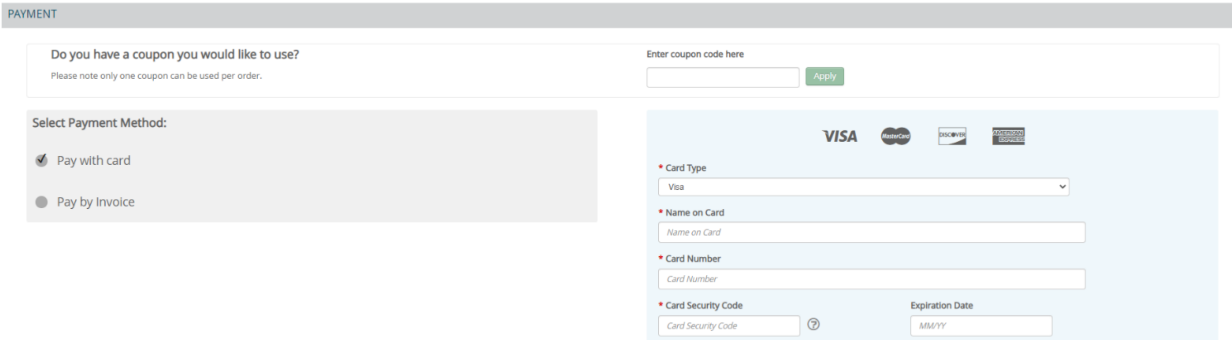
Select Account [ ] Select Account | Include Transactions | Export Account Balances

Invoice Number	Check Number	Date	Debit Amount	Credit Amount	Balance
		10/18/2013	4200.00		4200.00
		07/11/2014	1020.00		1680.00
		02/06/2015	2550.00		2700.00
		02/11/2015	765.00		3465.00
		02/20/2015	2550.00		6015.00
		02/20/2015	-2550.00		3465.00
		02/20/2015	-2550.00		915.00
		02/20/2015	-2550.00		0.00
		02/20/2015	2550.00		915.00
		02/20/2015	2550.00		3465.00



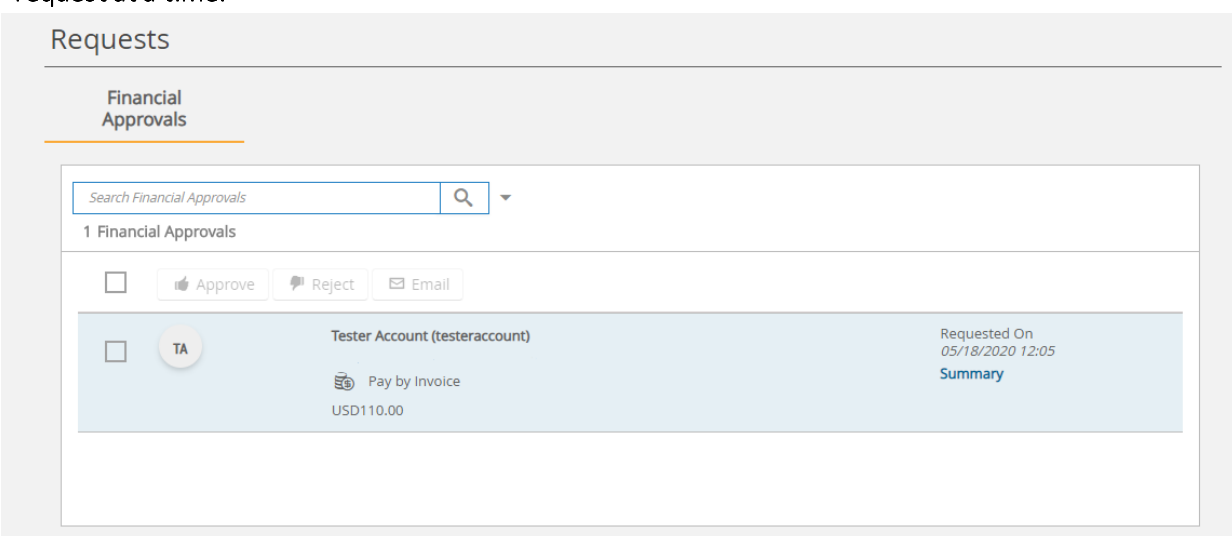
Pay by Invoice

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



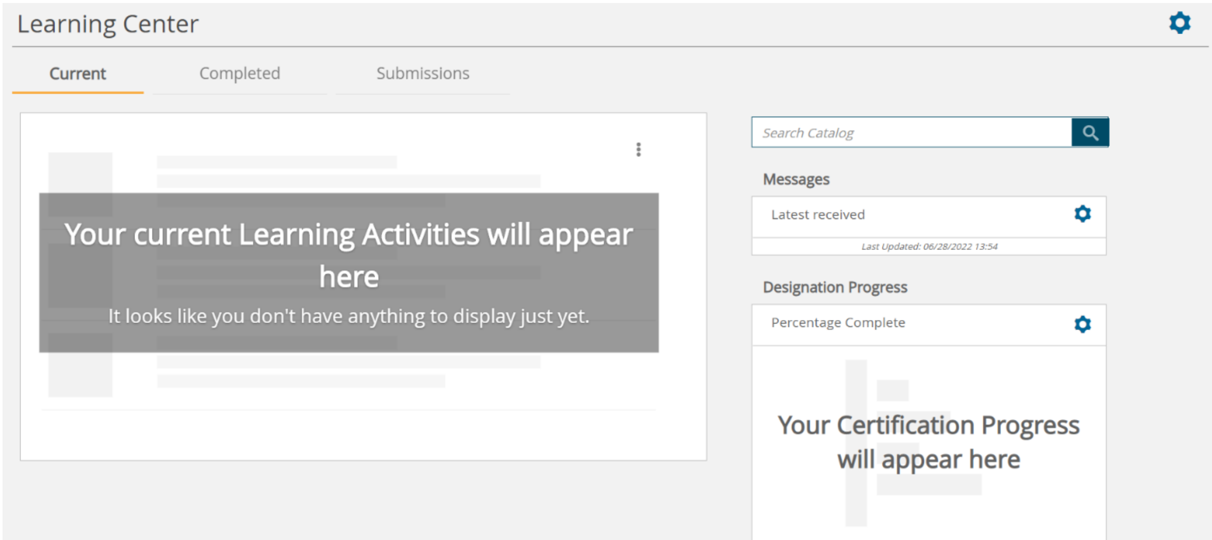
Approvals

When employees choose to bill a company or 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 E-mail icon located on the shortcut menu. Select the email requesting your approval. You will be redirected to the Financial Approvals page. 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.



Catalog

Select the magnifying glass next to **Search Catalog** from the Learning Center. You are now able to browse the **Catalog** by **Price Range**, by **Type** or **Category.**



Launch Reports

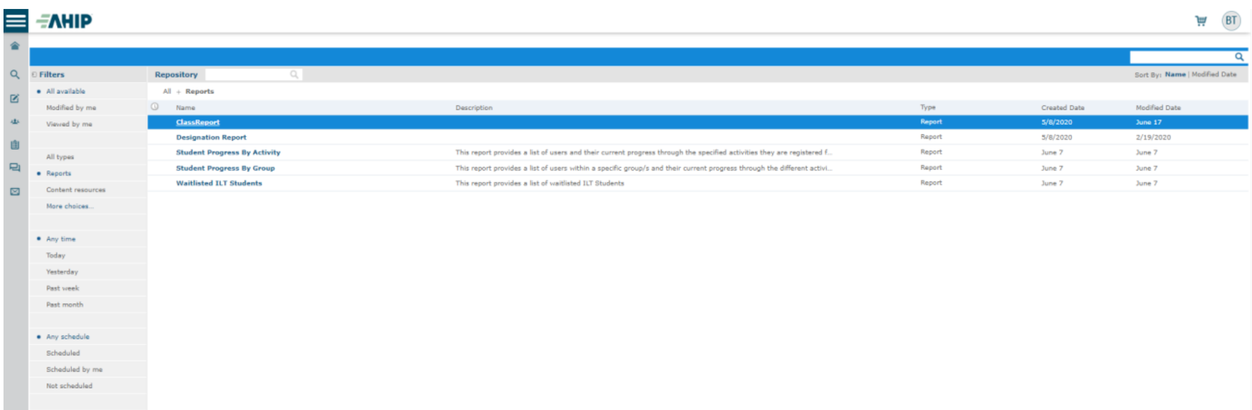
Click the main menu, and then Click on **Launch Reports**.

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.