



**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.

SIGN IN

Username

Password



Sign in

Forgot your password?

Don't Have an Account?

Register Now

Is My Browser Supported?

AHIP Online Learning


Stay competitive on your own schedule. Created by industry experts, AHIP's 40+ online courses, 15 designations, webinars, and other training resources are available 24/7, so you can learn at your own pace, any time, any place. Take a single course or build on what you learn to earn a professional designation.

Questions or Issues?

Contact: Support@AHIPInsuranceEducation.org
Call: 1.866.234.6909

Resources

- [Insurance Education Course Brochure](#)
- [Course Student Enrollment Instructions](#)
- [Transcript Request Form](#)
- [Course Transfer Instructions](#)



Please complete all the fields below to create a new AHIP account.
If you already have a user account, please click [here](#) to login.
Fields marked with an asterisk (*) are mandatory.

Register

Prefix:

* First name:

Middle names:

* Last name:

Suffix:

Designation:


* Job Title:

AHIP Certificates Achieved
(Health Insurance Associate,
Long Term Care Professional, etc.):

* Email:

* Confirm Email:

Date Of Birth:



* Phone:

Numbers only, no dashes

Ext:

Fax:

* Address 1:

Address 2:

* City:

* Country:

State:

* Zip Code:

Opt-out from receiving Mail:

☐

Opt-out from receiving E-mail:

☐

I am associated with a company:

☒

I am not associated with a company:

☐

* Company Name:

* Username:

* Password:

* Confirm Password:

Check this box to indicate
that you have read
and accept AHIP's Term and Conditions:

☐

Register

Opt Out

Logging Into Your Account

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

SIGN IN

Username

Username

Password

Password

Sign in

[Forgot your password?](#)

Don't Have an Account?

Register Now

[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

- These are the results of your LMS Browser Compatibility Test

- These tests are an indication of how well your browser should perform, and should highlight potential technical issues that may arise

Web Browser & OS

You are running Chrome 83.0.4103.116 on Windows 10 64-bit.

Pop-up Blocker

Popup Blocker is disabled for this site.

Adobe Flash Plugin

Adobe Flash Player plug-in not installed/enabled.
[Install Flash](#) as this may be required by some eLearning Courses.

Cookies

Cookies are enabled.

Misc Modern Browser Support Features

Pass.
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](#)

Cancel

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 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**.

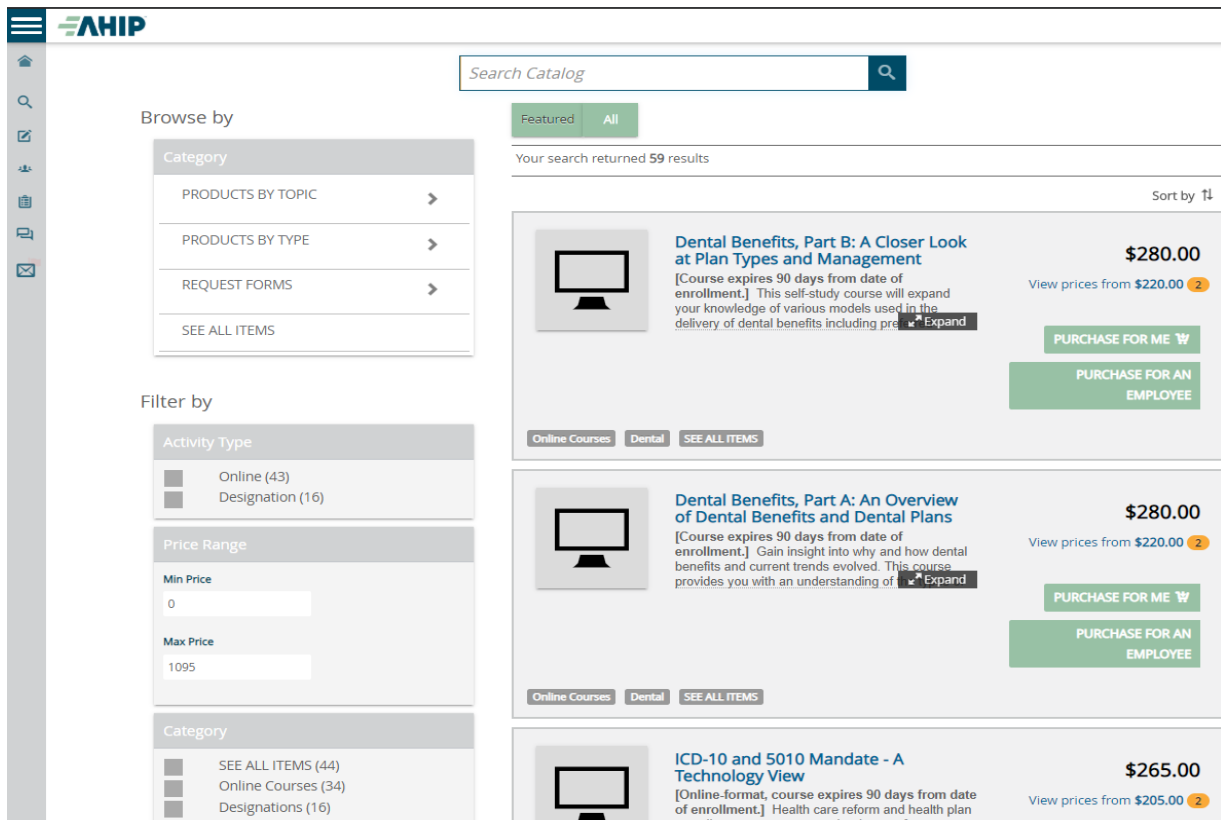
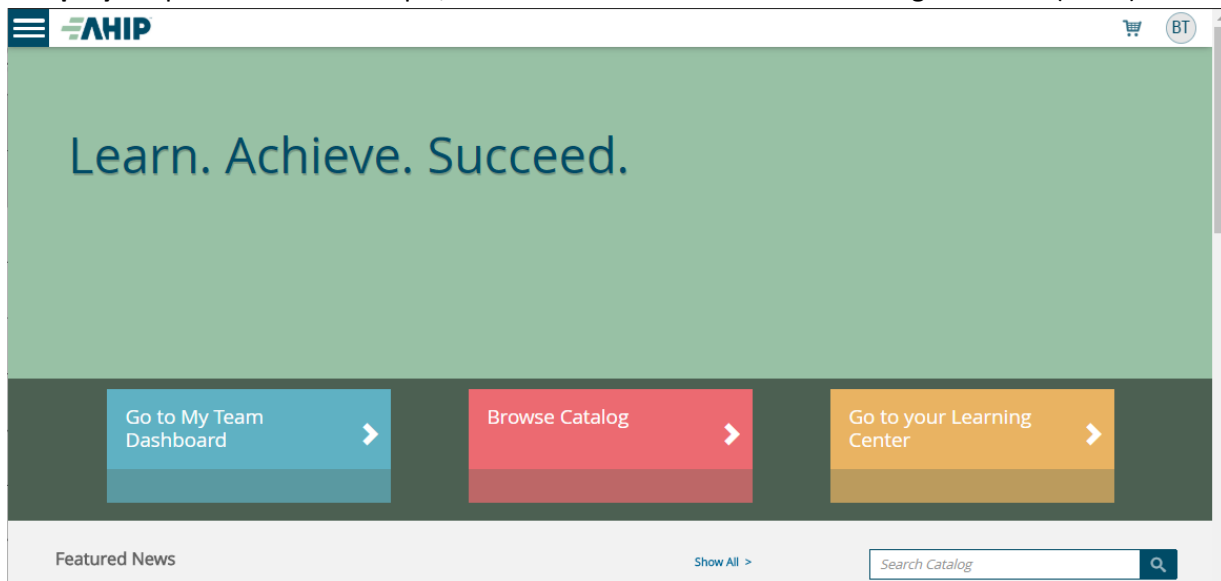
Main
Menu



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.

Select from list 1

Advanced

Show ☐ Use Exact Search

View Selected List

<input type="checkbox"/> All	Login name	First name	Last name	ID Number
<input type="checkbox"/>	bobtest20	Bob	Test20	

Submit

Cancel

Employee Course Enrollment Continued

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).

Shopping Cart

	Title	List Price	Actions	Amount
 ONLINE	Dental Benefits, Part A: An Overview of Dental Benefits and Dental Plans <i>Purchasing for Bob Test1</i>	\$280.00	REMOVE SAVE FOR LATER	\$280.00
SUBTOTAL: OVERALL TOTAL:				\$280.00 \$280.00

YOU MAY ALSO BE INTERESTED IN THESE ITEMS

DESIGNATION

Dental Benefits Associate

\$0.00

ONLINE

Dental Benefits, Part B: A Closer Look at Plan Types and Management

\$280.00

My Orders
Saved for Later
Continue Shopping

Employee Course Enrollment 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.

HOME

SEARCH

WISHLIST

ACCOUNT

CONTACT

FAQ

AHIP

MY CART

ITEMS


BILLING

PAYMENT

CONFIRMATION

TOTAL: \$280.00

YOUR ITEMS

Title	Quantity	Amount
 Dental Benefits, Part A: An Overview of Dental Benefits and Dental Plans <i>Purchasing for Bob Test1</i> ONLINE	1	\$280.00
SUBTOTAL:		\$280.00
OVERALL TOTAL:		\$280.00

BILLING

Title:

First Name:

First Name

Middle Name:

Middle Name

Last Name:

Last Name

Phone 1:

Phone 1

Phone 2:

Phone 2

Email Address:

Email Address

Address Line 1:

Address Line 1

Address Line 2:

Address Line 2

City:

City

State:

ZIP Code:

Zip Code

Country:

Employee Course Enrollment Continued

10

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**.

PAYMENT


Do you have a coupon you would like to use?


Enter coupon code here


Apply

Please note only one coupon can be used per order.

VISA







* Card Type

Visa


* Name on Card

* Card Number

* Card Security Code

?

Expiration Date

 PAY \$280.00 >

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.

MY CART

ITEMS

BILLING

PAYMENT

CONFIRMATION

TOTAL: \$150.00

YOUR ITEMS

	Title	Quantity	Amount
<div><div><div><div></div><div></div></div><div><div>ONLINE</div></div></div></div>	Accountable Care Organizations (ACOs)	1	<div><div>\$150.00</div><div>USE TOKEN</div></div>
SUBTOTAL:			\$150.00
OVERALL TOTAL:			\$150.00

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.

PRODUCTS BY TOPIC >

PRODUCTS BY TYPE >

REQUEST FORMS >

SEE ALL ITEMS

Filter by

Activity Type

☐ Online (43)

☒ Designation (16)

Price Range

Min Price

0

Max Price

1095


Category

☐ Designations (16)

☐ Health Savings Account (1)

☐ SEE ALL ITEMS (1)

Sort by 14



Health Savings Account (HSA) Expert Certificate

A comprehensive overview of HSA requirements for benefits administrators and financial institutions. Earning this certificate will help you to fully understand the eligibility requirements, contribution levels, account administration and best practices.


View prices from \$0.00 2

Expand

CHOOSE DESIGNATION PATH FOR ME A

ENROLL AN EMPLOYEE

Health Savings Account SEE ALL ITEMS Designations



Healthcare Anti-Fraud Associate (HCAFA) Designation


Industry professionals at every level—from senior counsel to staff assigned to special investigation units (SIUs)—are challenged every day with detecting and stopping health insurance fraud. The HCAFA designation helps you understand types of health insurance fraud and how to prevent it.

Expand

CHOOSE DESIGNATION PATH FOR ME A

ENROLL AN EMPLOYEE

Designations



Healthcare Compliance Professional (HCP)


AHIP has created the HCP designation specifically for individuals who work to meet the requirements of the Affordable Care Act (ACA) and ensure that their companies meet the parameters of all of the new rules, regulations, and deadlines.

Expand

CHOOSE DESIGNATION PATH FOR ME A

ENROLL AN EMPLOYEE

Designations



Professional, Health Insurance Advanced Studies

This designation is designed for experienced health insurance industry professionals who are focused on gaining a deeper knowledge of how various topics work together in an evolving health care environment.

Expand

CHOOSE DESIGNATION PATH FOR ME A

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.

Select from list 2

Show

☐ Use Exact Search

Login name	First name	Last name
bobtest1	Bob	Test1
bobtest20	Bob	Test20

Cancel

Designation Enrollment for Employees Continued

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

◀ MY CART


ITEMS

BILLING

CONFIRMATION

TOTAL: \$0.00

YOUR ITEMS

	Title	Quantity	Amount
 DESIGNATION	Professional, Academy for Healthcare Management <i>PARM Designation Path</i> <i>Purchasing for Tester Tester</i>	1	\$0.00 ⓘ
SUBTOTAL:			\$0.00
OVERALL TOTAL:			\$0.00

BILLING

Title:

* First Name:

Tester

Middle Name:

Middle Name

* Address Line 1:

1234 Test Account Way

Address Line 2:

Address Line 2

* City:

Tester

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.

Thank you for your order!

Please review the details of your order below.

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

[Return to homepage](#)

[Go to your Learning Center](#)

ORDER DETAILS

Order Number:
34953157

Completed Date:
04/06/2020 07:20

Billed To:
Tester Account
1234 Test Account Way,
Tester,
District of Columbia ,
11111,
United States

Method of Payment:
None

YOUR ITEMS

	Title	Quantity	Amount
	Professional, Academy for Healthcare Management PAHM Designation Path	1	\$0.00

My Team

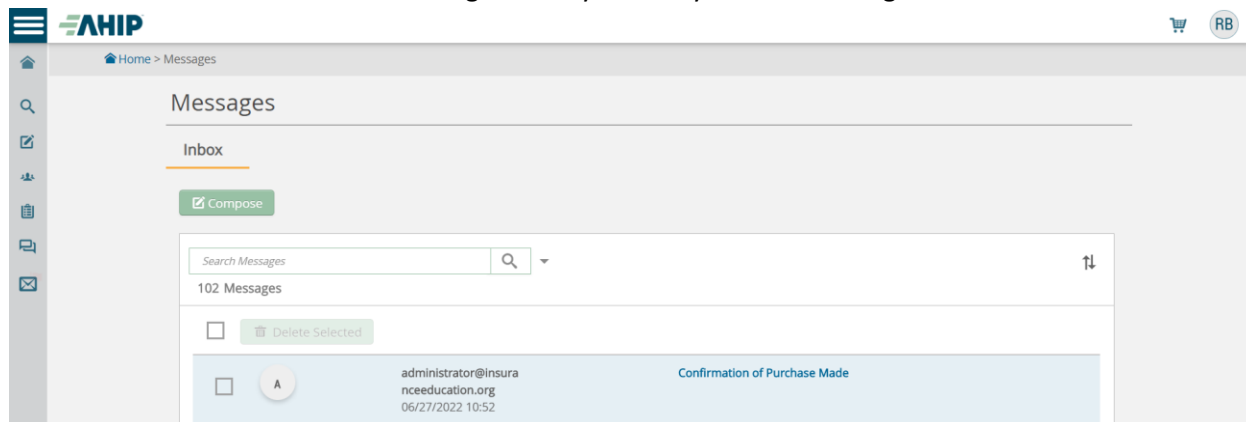
To check an employee's record and make any necessary modifications, click **Team**. The shortcut to this menu is on the left-hand side. Your employees will be listed under their respective group headings. To make changes to the employee's personal information, Click on **Edit User**, using the drop-down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

The screenshot shows the 'My Team' dashboard. At the top, there's a search bar labeled 'Search Team Members' and a dropdown arrow. Below it, it says '2 Team Members'. The first team member listed is 'Bob Test1' (bobtest1) with a location of 'Washington, District of Columbia (DC), United States'. To the right of the name is a green button labeled 'Current Learning' with a dropdown arrow. The dropdown menu is open, showing three options: 'Completed Learning', 'Designations', and 'Edit User'. To the right of the team member list, there are two sections: 'Team Upcoming Due Dates' and 'My Team Recent Updates'. The 'Team Upcoming Due Dates' section has a title 'Due dates for my team' and a message 'Upcoming Due Dates for your team will appear here'. The 'My Team Recent Updates' section has a title 'Updates for my team' and a message 'Recent Updates for your team'.

This is a close-up view of the 'My Team' dashboard. It shows the search bar with the text 'Search Team Members' and a dropdown arrow. Below the search bar, it says '2 Team Members'. The first team member listed is 'Bob Test1' (bobtest1) with a location of 'Washington, District of Columbia (DC), United States'. To the right of the name is a green button labeled 'Current Learning' with a dropdown arrow. The dropdown menu is open, showing three options: 'Completed Learning', 'Designations', and 'Edit User'.

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

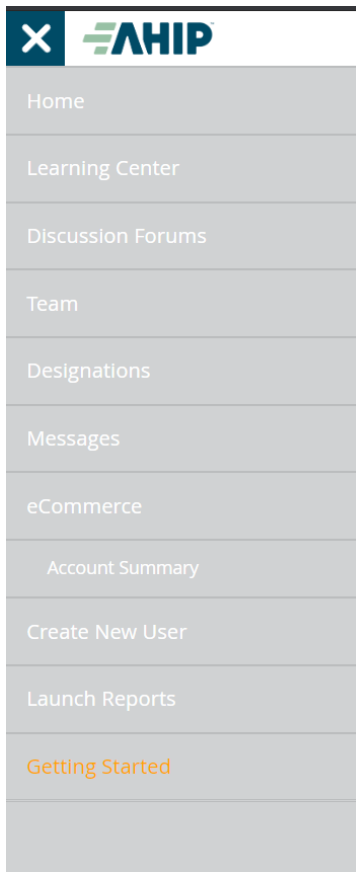
Select Account

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.

PAYMENT




Do you have a coupon you would like to use?
Please note only one coupon can be used per order.

Enter coupon code here

Select Payment Method:

☒ Pay with card


☐ Pay by Invoice

VISA   

* Card Type
Visa

* Name on Card

* Card Number

* Card Security Code  Expiration Date

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.

Requests

Financial Approvals

1 Financial Approvals

☐

<input type="checkbox"/>		Tester Account (testeraccount)  Pay by Invoice USD110.00	Requested On 05/18/2020 12:05 Summary
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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**.

The screenshot displays the 'Learning Center' interface. At the top, there is a header bar with the title 'Learning Center' and a settings gear icon. Below the header, there are three tabs: 'Current' (highlighted with an orange underline), 'Completed', and 'Submissions'. The main content area is divided into two columns. The left column features a large placeholder box with the text 'Your current Learning Activities will appear here' and 'It looks like you don't have anything to display just yet.' The right column contains a 'Search Catalog' input field with a magnifying glass icon. Below this, there are two sections: 'Messages' and 'Designation Progress'. The 'Messages' section shows 'Latest received' with a settings gear icon and a timestamp 'Last Updated: 06/28/2022 13:54'. The 'Designation Progress' section shows 'Percentage Complete' with a settings gear icon and a large placeholder box with the text 'Your Certification Progress will appear here' and a timestamp 'Last Updated: 06/28/2022 13:54'.

Launch Reports

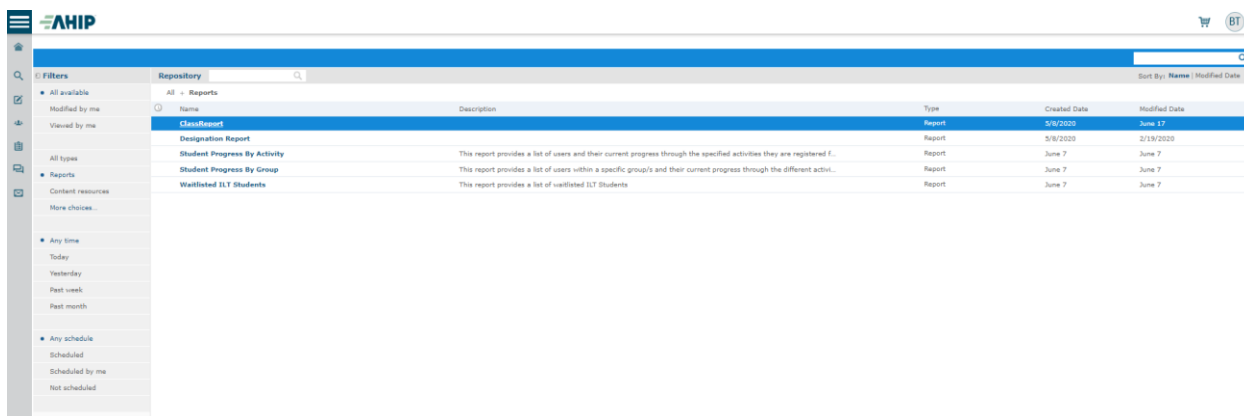
Click the main menu, and then Click on **Launch Reports**.

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.



The screenshot displays the AHIP Reports interface. On the left is a sidebar with a search icon and a list of filters. The main area shows a table of reports with columns for Name, Description, Type, Created Date, and Modified Date. The 'Classroom' report is highlighted in blue.

Name	Description	Type	Created Date	Modified Date
Classroom		Report	5/9/2020	June 17
Designation Report		Report	5/9/2020	2/19/2020
Student Progress By Activity	This report provides a list of users and their current progress through the specified activities they are registered f...	Report	June 7	June 7
Student Progress By Group	This report provides a list of users within a specific group's and their current progress through the different activi...	Report	June 7	June 7
Waitlisted ILT Students	This report provides a list of waitlisted ILT Students	Report	June 7	June 7

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.

The screenshot displays the AHIP Class Report interface. At the top, the AHIP logo is visible on the left, and a user profile icon with the initials 'BT' is on the right. Below the header, there is a search bar and a 'search report' button. The main area contains several filter fields: 'Date' (with a dropdown for 'Enrolled Date For'), 'Range Start', and 'Range End'. Each of these fields has a red error message below it stating 'This field is mandatory so you must enter data.' To the right of these fields is a 'Class Status' dropdown menu, which is currently open, showing a list of status options: Failed, Expired, Completed, In Progress, Pending, Enrolled, Wait Listed, Attended, and Enroll Cancelled. Below this list are buttons for 'All', 'None', and 'Insert'. Further right, there are checkboxes for 'Show Enrolled Students Only' and 'Complex Report', followed by a 'Classes' dropdown menu and a 'Select' button. At the bottom left, there are 'Apply', 'Reset', and 'Save' buttons. A large message box at the bottom center states: 'You must apply input values before the report can be displayed.'