



AETNA PRODUCER CERTIFICATION PORTAL

Administrative Reference Guide

AETNA Producer Certification Portal
Administrative Reference Guide

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Getting Started: Log In and User Registration

All users will begin on the Aetna login page.

The screenshot shows a web browser window with the URL <https://aetna.cmpsystem.com/ext/ahip/login.php>. The page features the Aetna logo and a banner image of three people walking in a park. Below the banner, there is a "Login" button. The main content area is titled "Welcome to Aetna's Medicare Producer Certification Training" and includes a paragraph of text: "All producers are required to be certified, licensed and appointed before engaging in any sales-related activities involving 2012 Aetna Medicare individual plans (MA, MAPD, PDP). In addition, producers must successfully complete these requirements to receive renewal commissions for Aetna Medicare individual plans in 2012." Below this text are two columns: "Sign In" and "Registration". The "Sign In" column contains fields for "Username" and "Password", a "Login" button, and links for "Forgot your username?" and "Forgot your password?". The "Registration" column contains the text "New and returning users, click here to proceed." and a "Create a New Account" button. On the left side, there is a "Contact Us" section with the phone number (888)247-1050 and a banner for "America's Health Insurance Plans Institute 2012" held from June 20-22, 2012 in Salt Lake City, UT. The footer contains copyright information, the text "Powered by CourseStage from Web Courseworks Ltd.", and a status message "You are not logged in. (Login)".

If you have been provided a sign in details, please sign in with your username and password. Usernames and passwords are case sensitive.

If you have not been provided sign in details, please click on the Create a New Account button.

Administration

To access administrative features, click on the Administration link.

Contact Aetna
Phone: 888.247.1050

You are logged in as Josh Moore
Profile | Logout

aetna

Aetna Transcript Reporting **Administration**

Site Administration

- Notifications
- Users
- Hierarchy
- Courses
- Grades
- Location
- Language
- Modules
- Security
- Appearance
- Front Page
- Server
- Networking

Aetna Front Runners

Individual & Group Regional Broker Support

Region	Email Address
NE	MedicareMidAtlanticBL@aetna.com
SE	CSSoutheastBL@aetna.com
Mid-America	MidAmericaBLUnit@aetna.com
West	BrokerLiasonUnitWE@aetna.com

Turn editing on

Contact Us

Difficulty with Your [Online Training?](#)

Contact Us:
(888) 247-1050

Resources

- Certification Instructions
- CMS
- Producer World
- Download Admin Reference Guide

My Certifications

Group Training

You will be taken to a list of all users which can be filtered. Also notice the subfolders in the Site Administration column to the left of your screen.

Aetna Transcript Reporting **Administration**

Site Administration

- Notifications
- Users
- Authentication
- Accounts
 - Browse list of users
 - Bulk user actions
 - Add a new user
 - Upload users
 - Upload user pictures
 - User profile fields

19 / 19 Users

New filter

Show Advanced

Full name contains

Add filter

Add a new user

First name / Last name	Email address	City/town	Country	Last access	
Admin User	administrator@webcourseworks.com		United States	2 hours 16 mins	Delete
Alex Noname	ms31@hood.edu	Frederick	United States	Never	Edit Delete

Update a User Profile

To look up a user account, type in the individual's first and/or last name and then click the Add filter button. The search filter by default is set to "contains".

Search results will display in the space below. Select the edit link to the right of the individual's name.

First name / Last name	Email address	City/town	Country	Last access	
Josh Moore	jmoore@ahip.org	Washington	United States	1 sec	Edit
Josh Smith	jmoore_email@ahip.org	Main	United States	71 days	Edit

In the Edit Profile section you can update general account information and custom fields.

Reset a Password

To reset a password, enter a new password in the New password field. Then click the Update Profile button at the bottom of the page.

The password must have at least 6 characters

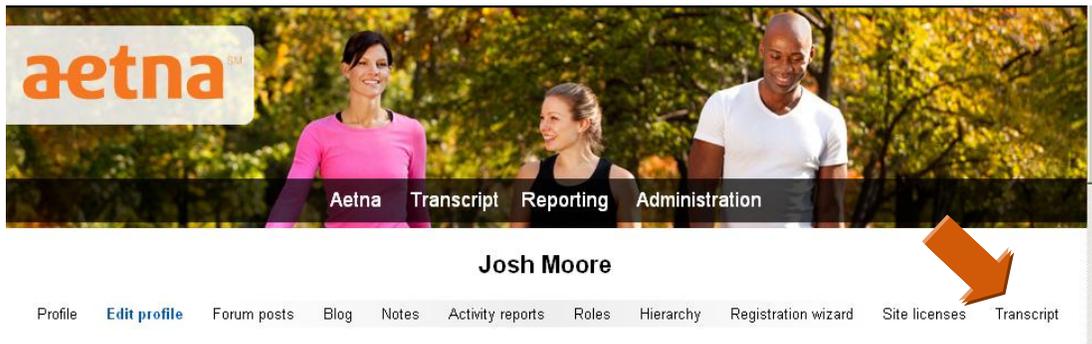
New password Unmask

Force password change

To prompt the user to change the password on their next login, check the box next to Force password change.

View User Certification Progress

While in a user's profile, click on the Transcript link.



In the Transcript tab, information about the user's training activities is visible. Hold your cursor over symbols that appear in the Status column for more information. You can also retrieve certificates if they are available by clicking on the Certificate symbol  in the Certificate column to the right of a course.

Josh Moore

Profile Edit profile Forum posts Blog Notes Activity reports Roles Hierarchy Registration wizard Site licenses **Transcript**

Name	Attempt	Start	Complete	Duration	Status	Score	Credits	Roles	Delivery method	Certificate	Additional
 Aetna Code of Conduct	1	April 2, 2012	June 1, 2012	04h 09m 23s		100.00	--	System Administrator	--	--	--
 Aetna Group Medicare Training	1	March 22, 2012	June 1, 2012	04h 09m 13s		20.00	--	System Administrator	--	--	--
 Aetna Individual Medicare Training	1	March 19, 2012	June 1, 2012	02h 39m 01s		10.00	--	System Administrator	--	--	--
 Aetna Medicare Code of Conduct	1	March 22, 2012	June 1, 2012	05h 16m 20s		100.00	--	System Administrator	--	--	--

View User Site Activity

Similar to the Audit Trail feature in the previous version of the training portal, administrators can view a user's activity on the website. While in a user's profile, click on the Activity reports link.

The screenshot shows the user profile for Josh Moore. At the top, there is a navigation bar with links for Aetna, Transcript, Reporting, and Administration. Below this, the user's name 'Josh Moore' is displayed. A secondary navigation bar includes links for Profile, Edit profile, Forum posts, Blog, Notes, Activity reports (highlighted with an orange arrow), Roles, Hierarchy, Registration wizard, Site licenses, and Transcript. The profile details section shows a red circular icon with 'CS', and text for Country (United States), City/town (Washington), and Email address (jmoore@ahip.org). Below this is a table of license fields.

License fields	Site License	Field	User entry
	Aetna	Region	Nothing entered
	Aetna	User Level	Nothing entered
	Aetna	Partner Level	Nothing entered
	Aetna	Upline Partner	Nothing entered
	Aetna	Group Retiree Sales Segment	Nothing entered

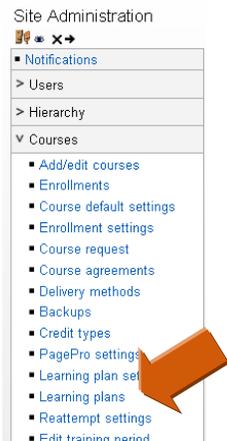
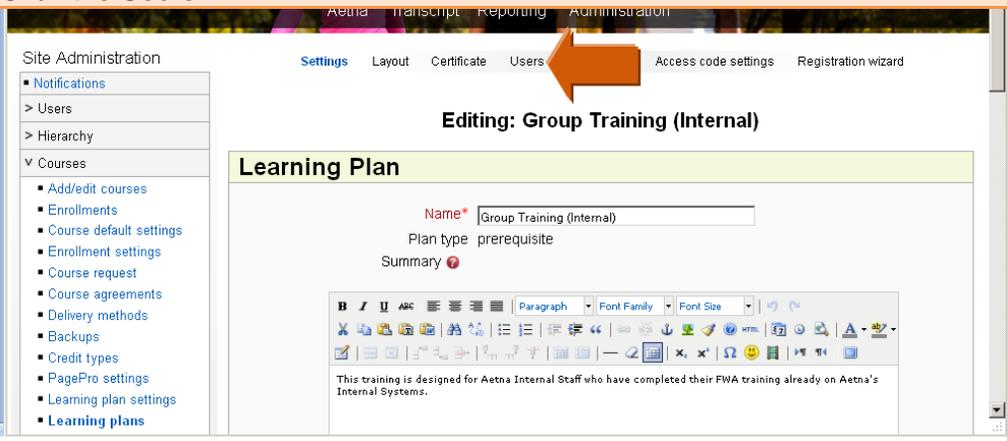
Below the table, there is a section for Learning plans with a link for Group Training (Unenroll me).

Then click on the link for the report or log of interest.

This screenshot shows the same user profile for Josh Moore, but with the 'Activity reports' link expanded. The expanded menu includes links for Outline report, Complete report, Today's logs, All logs, Statistics, and Grade. The rest of the page layout, including the navigation bars and profile details, remains the same as in the previous screenshot.

Modify a User's Certification Track

To add a user to a learning plan, follow the steps below.

Step	Action																					
1.	From the Medicare Course Home page, under the Site Administration section, select Courses, then Learning plans.																					
	 <p>Site Administration <ul style="list-style-type: none"> Notifications Users Hierarchy Courses <ul style="list-style-type: none"> Add/edit courses Enrollments Course default settings Enrollment settings Course request Course agreements Delivery methods Backups Credit types PagePro settings Learning plan settings Learning plans Reattempt settings Edit training period </p>																					
2.	Click Edit to the right of the learning plan of interest.																					
	 <p>Site Administration</p> <div style="float: right; border: 1px solid #ccc; padding: 5px; width: 60%;"> <h3 style="text-align: center; margin: 0;">Learning Plans</h3> <p style="text-align: right; margin: 0;">New plan</p> <table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr style="background-color: #f2f2f2;"> <th style="text-align: left;">Name ↓</th> <th style="text-align: center;">Edit</th> <th style="text-align: center;">Remote</th> </tr> </thead> <tbody> <tr> <td>2012 Marketing Medicare Advantage and Part D Prescription Drug Plans: Understanding Medicare Basics, Plan Types, and Marketing and Enrollment Requirements</td> <td style="text-align: center;">Edit</td> <td style="text-align: center;">Remote</td> </tr> <tr> <td>2013 AHIP Medicare Training</td> <td style="text-align: center;">Edit</td> <td style="text-align: center;">Remote</td> </tr> <tr> <td>Group Training</td> <td style="text-align: center;">Edit</td> <td style="text-align: center;">Delete</td> </tr> <tr> <td>Group Training (Internal)</td> <td style="text-align: center;">Edit</td> <td style="text-align: center;">Delete</td> </tr> <tr> <td>Individual Training</td> <td style="text-align: center;">Edit</td> <td style="text-align: center;">Delete</td> </tr> <tr> <td>Individual Training (Internal)</td> <td style="text-align: center;">Edit</td> <td style="text-align: center;">Delete</td> </tr> </tbody> </table> </div>	Name ↓	Edit	Remote	2012 Marketing Medicare Advantage and Part D Prescription Drug Plans: Understanding Medicare Basics, Plan Types, and Marketing and Enrollment Requirements	Edit	Remote	2013 AHIP Medicare Training	Edit	Remote	Group Training	Edit	Delete	Group Training (Internal)	Edit	Delete	Individual Training	Edit	Delete	Individual Training (Internal)	Edit	Delete
Name ↓	Edit	Remote																				
2012 Marketing Medicare Advantage and Part D Prescription Drug Plans: Understanding Medicare Basics, Plan Types, and Marketing and Enrollment Requirements	Edit	Remote																				
2013 AHIP Medicare Training	Edit	Remote																				
Group Training	Edit	Delete																				
Group Training (Internal)	Edit	Delete																				
Individual Training	Edit	Delete																				
Individual Training (Internal)	Edit	Delete																				
3.	Click the Users link.																					
	 <p>Site Administration</p> <div style="float: right; border: 1px solid #ccc; padding: 5px; width: 60%;"> <p style="text-align: center; margin: 0;">Editing: Group Training (Internal)</p> <div style="background-color: #f2f2f2; padding: 5px; border: 1px solid #ccc;"> <h3 style="margin: 0;">Learning Plan</h3> <p style="margin: 0;">Name* <input type="text" value="Group Training (Internal)"/></p> <p style="margin: 0;">Plan type prerequisite</p> <p style="margin: 0;">Summary ?</p> <div style="border: 1px solid #ccc; padding: 5px; margin: 5px 0;"> <p style="font-size: small; margin: 0;">This training is designed for Aetna Internal Staff who have completed their FWA training already on Aetna's Internal Systems.</p> </div> </div> </div>																					

4. Select the user you wish to add from the list on the right, then click the Add button. You may also search for the user by entering their name in the search field.

Site Administration

- Notifications
- Users
- Hierarchy
- Courses
 - Add/edit courses
 - Enrollments
 - Course default settings
 - Enrollment settings
 - Course request
 - Course agreements
 - Delivery methods
 - Backups
 - Credit types
 - PagePro settings
 - Learning plan settings
 - Learning plans
 - Reattempt settings
 - Edit training period
- Grades

Settings Layout Certificate **Users** Recalculate Access code settings Registration wizard

Manage users: Group Training (Internal)

Don Sanzone-Smith, noemail@email.com
Don Johnson, donjohnson@miamivice.com
Mike Johnson, noemail@no_email.com
Josh Moore, jmoore@ahip.org
Hima Newb, imanewb@email.com

Admin User, administrator@webcourseworks.com
Raffaele Vitelli, rvitelli@ahip.org
Lurt Hudson, bhudson@ahip.org
...st, aetnatest@ahip.org
...moore_email@ahip.org
...powersl@aetna.com
Alex Noname, ms31@hood.edu
Chip Peters, peterschip@aetna.com
Orlando Romero, romeroo@aetna.com
New User, newuser@newuseremail.com
Ralph Taylor, taylorr@aetna.com
Pete Alberti, pete.alberti@gmail.com
Joe Schmoe, 302010+joeschmoe@gmail.com
Tom Jones, tj@noemail.com

◀ Add Remove ▶

Search

Mark a User Active or Inactive

To mark a user as inactive, click on Administration.

aetna

Aetna Transcript Reporting **Administration**

Site Administration

Aetna Front Runners

Individual & Group Regional Broker Support

Turn editing on

Contact Us

Difficulty with Your

Then search for the user and click the delete link that appears to the right of their record. Please note users that have been deactivated will not be able to log in.

Aetna Transcript Reporting **Administration**

Site Administration

- Notifications
- Users
 - Authentication
 - Accounts
 - Browse list of users
 - Bulk user actions
 - Add a new user
 - Upload users
 - Upload user pictures
 - User profile fields
 - AHIP
 - Extended profile
 - Designator settings
 - Permissions
 - Access codes
- Hierarchy
- Courses

19 / 19 Users

New filter

Show Advanced

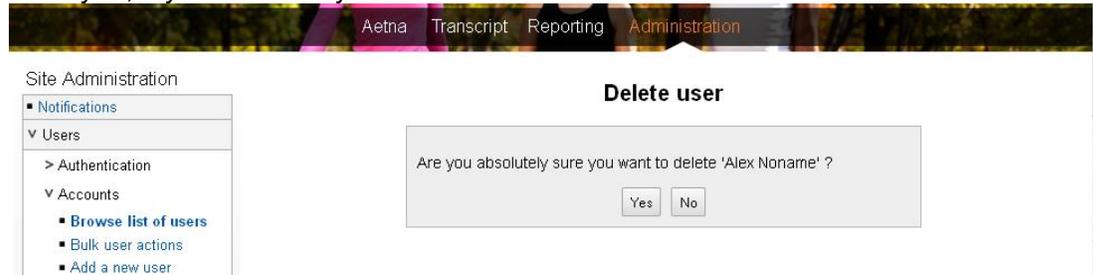
Full name contains

Add filter

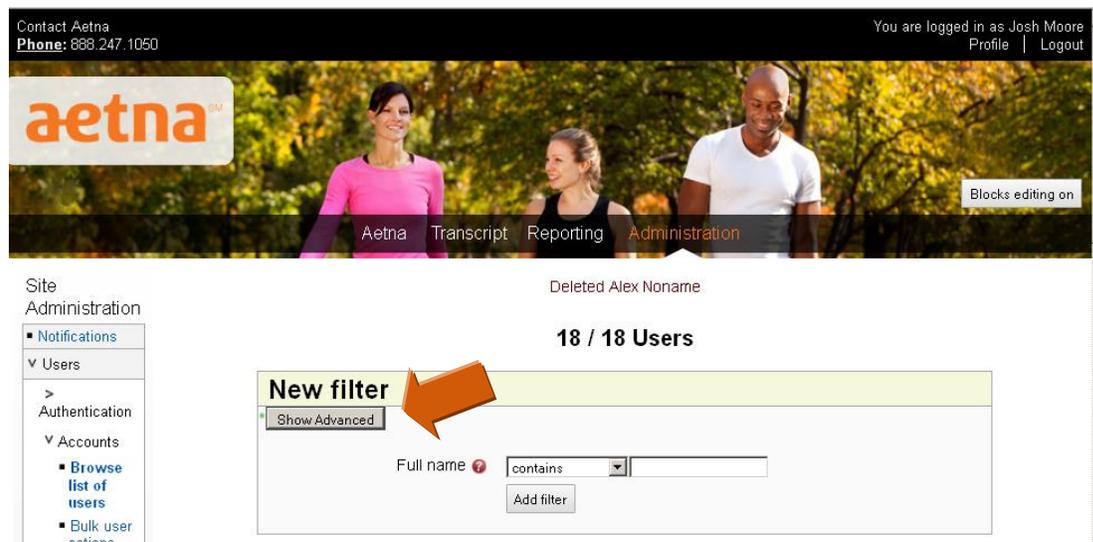
Add a new user

First name / Last name	Email address	City/town	Country	Last access	
Admin User	administrator@webcourseworks.com		United States	3 hours 37 mins	Delete
Alex Noname	ms31@hood.edu	Frederick	United States	Never	Edit Delete

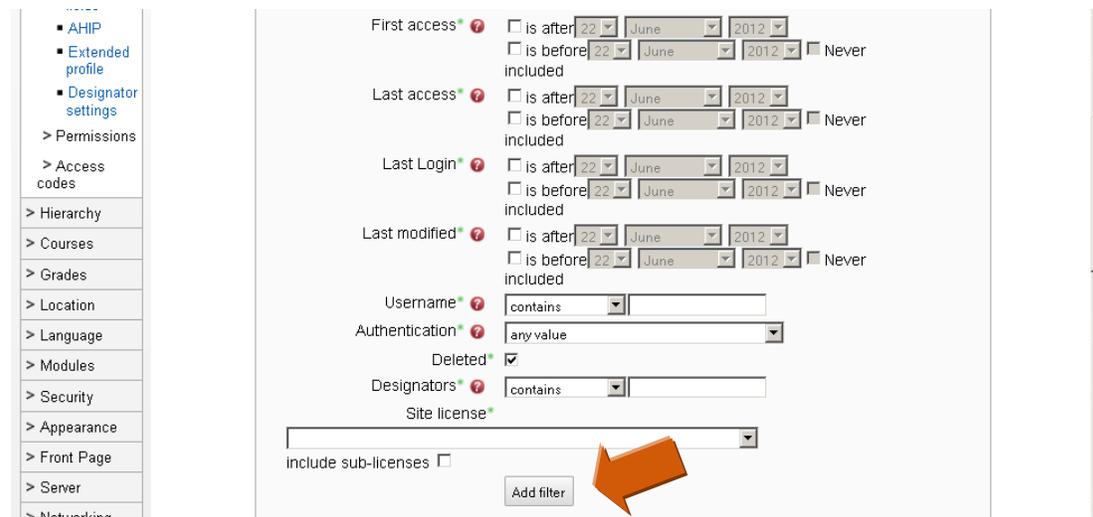
Click yes, if you are sure you would like to delete the user.



If a user needs to be restored, return to the Administration page and click on the Show Advanced button.



Then scroll down, check the box next to Deleted and click the Add filter button.



The deleted user will appear in the list displayed. Click the restore link to the right of the user's record.

The screenshot shows a sidebar on the left with navigation options like 'Upload users', 'Permissions', and 'Location'. The main content area has an 'Active filters' section with a checkbox for 'Show only deleted users' and buttons for 'Remove selected' and 'Remove all filters'. Below this is a link to 'Add a new user'. A table lists users with columns for 'First name / Last name', 'Email address', 'City/town', 'Country', and 'Date Deleted'. One user, 'Alex Noname', is listed with email 'ms31@hood.edu' and a 'Restore' link, which is highlighted by an orange arrow.

Enter a username and password and then click the Submit button. Please note the username must be lowercase.

The screenshot shows a sidebar with 'Users' expanded. The main area is titled 'Restore user' and contains a form with three input fields: 'Username', 'Email address' (pre-filled with 'ms31@hood.edu'), and 'Password'. There are 'Submit' and 'cancel' buttons at the bottom.

The user's first and last name will be displayed on the following page.

The screenshot shows the Aetna website header with navigation links for 'Aetna', 'Transcript', 'Reporting', and 'Administration'. Below the header, the user management interface is shown. The sidebar is the same as in the previous screenshot. The main area displays 'Restored Alex Noname' with an orange arrow pointing to it, and '2 / 22 Users'. Below this is a 'New filter' section with a dropdown menu set to 'contains' and an 'Add filter' button. The 'Active filters' section is also visible at the bottom.

Edit Page Banners

To edit the content blocks of site pages, click the Turn editing on button.

The screenshot shows the Aetna Producer Certification Portal interface. At the top, there is a navigation bar with the Aetna logo and a menu with items: Aetna, Transcript, Reporting, and Administration. Below the navigation bar, there are several content blocks. On the left, there is a 'Site Administration' sidebar with a tree view containing: Notifications, Users, Hierarchy, Courses, Grades, Location, Language, Modules, Security, Appearance, Front Page, Server, and Networking. The main content area is divided into three columns. The first column contains 'Aetna Front Runners' with a circular logo and a 'My Certifications' section below it. The second column contains 'Individual & Group Regional Broker Support' with a table of email addresses. The third column contains 'Contact Us' and 'Resources' sections. An orange arrow points to a 'Turn editing on' button located above the 'Contact Us' section.

Region	Email Address
NE	MedicareMidAtlanticBL@ae
SE	CSSoutheastBL@aetna.co
Mid-America	MidAmericaBLUnit@aetna.c
West	BrokerLiasonUnitWE@aetn

Editing symbols for each of the content blocks on the page will be displayed.

This screenshot shows the same Aetna Producer Certification Portal interface as the previous one, but with editing symbols (handles) displayed over the content blocks. The 'Turn editing on' button is now 'Turn editing off'. The editing symbols are: 2 handles for the 'Aetna Front Runners' block, 3 handles for the 'Individual & Group Regional Broker Support' block, and 4 handles for the 'My Certifications' block. The table of email addresses is also visible.

Region	Email Address
NE	MedicareMidAtlanticBL@ae
SE	CSSoutheastBL@aetna.co
Mid-America	MidAmericaBLUnit@aetna.c
West	BrokerLiasonUnitWE@aetn

For more information about the block editing symbols, please see the table below.

Symbol	Function
	Assign Roles so that certain user roles can edit the block. Should not be used
	Click on the eye to hide the block from public view. When it has been clicked the symbol will change to 
	Configuration
	Delete. Please note you will not receive a warning upon clicking this symbol. Items that have been deleted cannot be recovered
	Move down, Move right, Move left, Move up

Reporting Features

The new portal provides numerous reporting options with useful filtering capabilities. To access reporting features click on the Reporting link.

Contact Aetna
Phone: 888.247.1050

You are logged in as Josh Moore
Profile | Logout

aetna

Aetna Transcript Reporting Administration

Site Administration

- Notifications
- Users
- Hierarchy
- Courses
- Grades
- Location
- Language
- Modules
- Security
- Appearance
- Front Page
- Server
- Networking

Aetna Front Runners

Individual & Group Regional Broker Support

Region	Email Address
NE	MedicareMidAtlanticBL@aetna.com
SE	CSSoutheastBL@aetna.com
Mid-America	MidAmericaBLUnit@aetna.com
West	BrokerLiasonUnitWE@aetna.com

Turn editing on

Contact Us

Difficulty with Your [Online Training?](#)

Contact Us:
(888) 247-1050

Resources

- Certification Instructions
- CMS
- Producer World
- Download Admin Reference Guide

My Certifications

Group Training

Generating Reports with Filters

Under Filters, click on the dropdown next to Add new filter to see filter options.

Contact Aetna
Phone: 888.247.1050

You are logged in as Josh Moore
Profile | Logout

aetna

Aetna Transcript Reporting Administration

Blocks editing on

Site Administration

- Notifications
- Users
- Hierarchy
- Courses
- Grades
- Location
- Language
- Modules
- Security
- Appearance
- Front Page

Filters

Add new filter...
Add new filter...
Completed Manager
Name (select from list)
Name (free search)
Started Status
User (free search)
Access Code
Learning category
Site license
Training period

Apply filter changes Clear

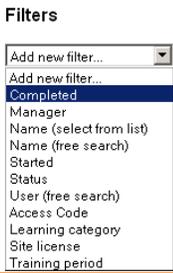
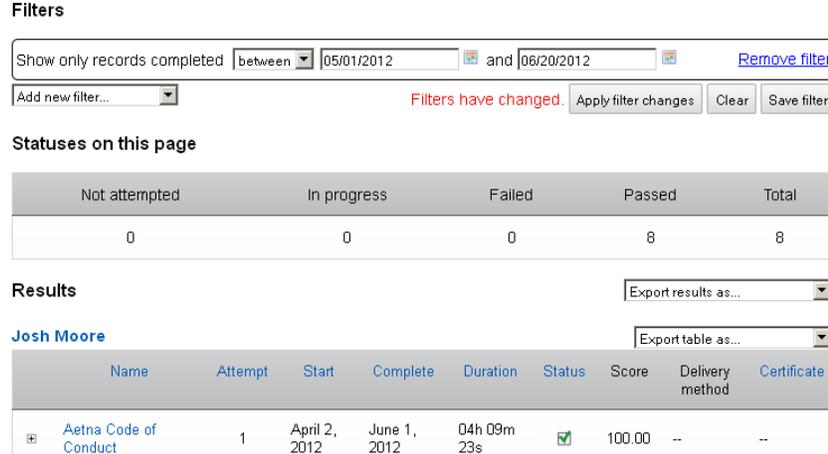
	In progress	Failed	Passed	Total
	27	0	14	68

Export results as...
Export table as...

Test Aetna Test

Name	Attempt	Start	Complete	Duration	Status	Score	Delivery method	Certificate method
------	---------	-------	----------	----------	--------	-------	-----------------	--------------------

For example, to produce a report using the completed filter, follow the steps below.

Step	Action																																																							
1.	Select Completed from the Add new filter dropdown menu																																																							
	 <p>The screenshot shows a dropdown menu titled 'Filters' with the following options: Add new filter..., Add new filter..., Completed, Manager, Name (select from list), Name (free search), Started, Status, User (free search), Access Code, Learning category, Site license, and Training period.</p>																																																							
2.	Select option from Show only records completed. The between option has been selected in this example.																																																							
	 <p>The screenshot shows the 'Filters' section with 'Show only records completed' set to 'between'. A dropdown menu is open showing options: before, after, and between. Buttons for 'Remove filter', 'Apply filter changes', and 'Clear' are visible.</p>																																																							
3.	Enter the appropriate dates. Dates can be typed into fields or selected from the calendar that appears when clicking on the calendar symbol to the right of the field.																																																							
	 <p>The screenshot shows the 'Filters' section with 'Show only records completed' set to 'between' and dates '05/01/2012' and '06/20/2012' entered. A calendar for May 2012 is displayed, with the 1st and 20th highlighted. Buttons for 'Remove filter', 'Apply filter changes', and 'Clear' are visible.</p>																																																							
4.	Once the dates have been entered, click the Apply filter changes button.																																																							
	 <p>The screenshot shows the 'Filters' section with the dates '05/01/2012' and '06/20/2012' entered. The 'Apply filter changes' button is highlighted. A message 'Filters have changed.' is displayed.</p>																																																							
5.	The reports results will display in the Results section of the page.																																																							
	 <p>The screenshot shows the final report results. The 'Filters' section is at the top. Below it is a table titled 'Statuses on this page' and a 'Results' section for 'Josh Moore'.</p> <table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th colspan="5">Statuses on this page</th> </tr> <tr> <th>Not attempted</th> <th>In progress</th> <th>Failed</th> <th>Passed</th> <th>Total</th> </tr> </thead> <tbody> <tr> <td style="text-align: center;">0</td> <td style="text-align: center;">0</td> <td style="text-align: center;">0</td> <td style="text-align: center;">8</td> <td style="text-align: center;">8</td> </tr> </tbody> </table> <table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th colspan="10">Results</th> </tr> <tr> <th colspan="10">Josh Moore</th> </tr> <tr> <th>Name</th> <th>Attempt</th> <th>Start</th> <th>Complete</th> <th>Duration</th> <th>Status</th> <th>Score</th> <th>Delivery method</th> <th>Certificate</th> <th></th> </tr> </thead> <tbody> <tr> <td>Aetna Code of Conduct</td> <td style="text-align: center;">1</td> <td>April 2, 2012</td> <td>June 1, 2012</td> <td>04h 09m 23s</td> <td style="text-align: center;">✔</td> <td style="text-align: center;">100.00</td> <td style="text-align: center;">--</td> <td style="text-align: center;">--</td> <td></td> </tr> </tbody> </table>	Statuses on this page					Not attempted	In progress	Failed	Passed	Total	0	0	0	8	8	Results										Josh Moore										Name	Attempt	Start	Complete	Duration	Status	Score	Delivery method	Certificate		Aetna Code of Conduct	1	April 2, 2012	June 1, 2012	04h 09m 23s	✔	100.00	--	--	
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Reports by Request

The following reports can be provided by AHIP:

- AHIP Exam Attempt Report
- AHIP Billing Detail Report

An individual user's exam attempts can also be viewed from their account. Please see the View User Certification Progress section of these instructions for more information.