

ANTHEM MEDICARE CERTIFICATION TRAINING CENTER

SALES EVENT TRACKER



Anthem Medicare Certification Training Center Sales Event Tracker

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Accessing the Sales Event Tracker

Only users who have completed the required training on the certification site will have access to the Sales Event Tracker. Required training may involve assigned Compliance Training and at least one product module (HMO, PPO, PDP, or SNP).

The screenshot displays a user's certification status. Under the heading 'My Certifications', five items are listed, each with a green checkmark, a progress bar at 100%, and the text '100% complete' with a plus icon. The items are: '2018 Compliance Training (All Courses)', '2018 HMO', '2018 PDP', '2018 PPO', and '2018 SNP'. Below this list is a section titled 'Sales Event Tracker' with a sub-link 'Sales Event Tracker'.

Item	Progress	Status
2018 Compliance Training (All Courses)	100%	complete
2018 HMO	100%	complete
2018 PDP	100%	complete
2018 PPO	100%	complete
2018 SNP	100%	complete

Sales Event Tracker

Sales Event Tracker

Note: For this year, when a user is certified for 2018 they should be granted access to create Sales Events for both 2017 and 2018.

The Sales Event Tracker Home Page

The Sales Event Tracker (SET) home page is the landing page for SET users.

Anthem.

[Home](#) [Create event](#) [My sales events](#) [Certification Portal](#)

Please note:

Formal and Informal Sales Events must be reported.
Do not report Educational Events.
Anthem requires all agents to report sales prior to advertising the event or more than ten (10) calendar days prior to the event's scheduled date, whichever is earlier.
Anthem requires updates or cancellations be reported no less than 5 days prior to the scheduled event.
If an event is scheduled following an [Anthem-recognized holiday](#), updates or cancellations must be reported no less than five (5) days prior to the holiday.

My Sales Events

[VIEW MY SALES EVENTS](#)

[I have 0 pending Events](#)

Upcoming events

- [Wed. 07/01/2015 08:00 AM PST](#)
 New York - New York - Venue Name
- [Thu. 07/02/2015 08:00 AM PST](#)
 New York - New York - Venue Name
- [Fri. 07/03/2015 08:00 AM PST](#)
 New York - New York - Venue Name

Take care to read the “Please note” section:

- Formal and Informal Sales Events must be reported.
- Do not report Educational Events.
- Anthem requires all agents to report events prior to advertising the event or more than ten (10) calendar days before the event’s scheduled date, whichever is earlier.
- Anthem requires updates or cancellations be completed no less than 5 days prior to the scheduled event.
- If an event is scheduled following an **Anthem-recognized holiday**, updates or cancellations must be completed no less than 5 days prior to the holiday.

Creating an Event

Anthem.

[Home](#)
[Create event](#)
[My sales events](#)
[Confirmation Portal](#)

Create Event

Please note:

Formal and Informal Sales Events must be reported.
 Do not report Educational Events.
 Anthem requires all agents to report sales prior to advertising the event or more than ten (10) calendar days prior to the event's scheduled date, whichever is earlier.
 Anthem requires updates or cancellations be reported no less than 5 days prior to the scheduled event.
 If an event is scheduled following an [Anthem-recognized holiday](#), updates or cancellations must be reported no less than five (5) days prior to the holiday.

Event Information

Event name: *

Event start date: * Event start time: *
 Format: 06/18/2015 Format: 02:16 PM

Event type: *

Event stop time: *
 Format: 02:16 PM

Event contact: *
 First and last name:

Event contact phone: *
 Format: 000-000-0000 x0000

Time zone: *

Disbursement Firm / Agency: *
 enter N/A if not applicable

Venue Information

By entering an event location, you are affirming the venue has confirmed location, time, and policy in advance. Repeated occurrences of event modifications or cancellations may result in corrective action.

Venue name: *
 (limit 100 characters)

Venue address 1: *

Venue address 2:

Venue phone: *
 Format: 000-000-0000 x0000

Venue capacity:

Venue city: *

Venue state: *

Venue zip: *
 Allowed formats: 12345 and 12345-1234

Venue county:

Marketing Information

You may select several products. You are allowed to choose more than one healthcare product at the sales event.

Product year: *
 -Year:

Product: *
 MA Only
 PDP Only
 MAPD

Plan: *
 HMO
 LPPD
 PPO
 RPPD

Contract number: *

Add selected contract number to list

Use of contract numbers: *

Delete selected contract number from list

Marketing ZIP or County:
 Allowed formats: 12345 and 12345-1234

Newspaper support:

Event will be advertised
 All events must be submitted to CMS prior to advertising

Advertised Date:
 Format: 06/18/2015

Facility type:
 Facility type: *
 Select other to enter your own option.

Representative/Agent Name: *

Representative/Agent National Producer Number: *

Retail Store Program

Please validate that all information for this form is correct. You may save this event at any time. When your event is complete, you MUST also click the "Submit Event" button below to submit this event to CMS.

Upon creating and saving a NEW sales event, a unique ID (i.e. Event ID) will be assigned for identification and tracking purposes. If the event is edited or modified, the original sales event ID will remain.

- This is the ID shown on the event listing page and included in the submission to CMS. It will not show on the Create/Edit Event page.

All required fields are indicated with an asterisk. Upon submission, all fields will be validated and any missing required fields or invalid field entries will be highlighted. The invalid or missing fields must be corrected prior to the form submission being accepted.

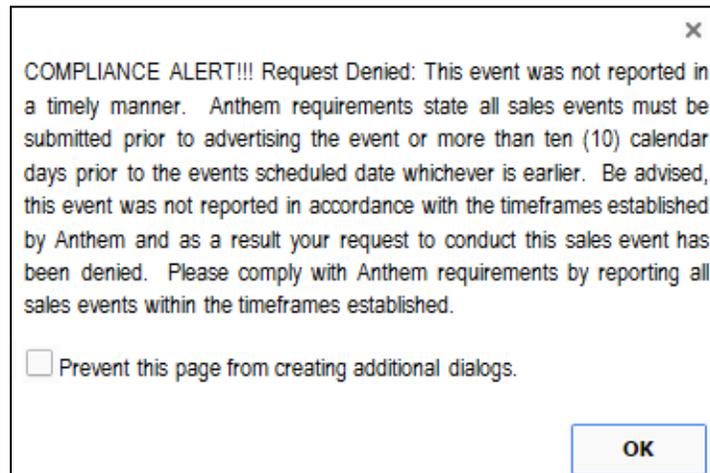
If the event being scheduled is part of the Anthem Retail Store Program, the checkbox should be selected.

Retail Store Program

Event Information

Please note the Event Name and Event Contract Number cannot be changed when modifying an event that has been submitted to CMS.

Also note, for the Event Date a new event cannot be submitted within 10 days of the current date. If an event is created and submitted within 10 days of the current date, the user will receive the following popup message:



Product Year is pre-populated based on certification year period selected previously. Available Product years will depend upon training completed on the Anthem Medicare Certification Center. Completion of 2018 Certification allows access to 2017 and 2018 products.

Product: Available Product options will depend upon training completed on the Anthem Medicare Certification Center and product availability in the state the event is being held. Possible options include: MA Only, MAPD or PDP Only.

Plan: Available Plan options will depend upon training completed on the Anthem Medicare Certification Center, the Product option selected, and plan availability in the state the event is being held in. Possible Plan options include: RPPO, LPPO, HMO, Part D, and SNP.

Contract Number: Contract Number options will depend upon training completed on the Anthem Medicare Certification Center, the Product option selected, and the Plan selected.

You may select several products. You are allowed to discuss more than one Anthem Product/Plan at your event. Selecting additional Products and Plans will allow you to add additional contract numbers to your list.

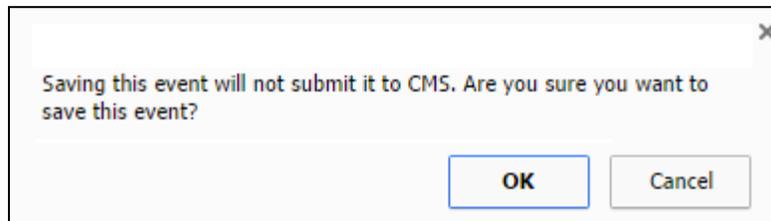
Product year: * 2018 ▼	Marketing ZIP or County : <input type="text"/> <small>Allowed formats:12345 and 12345-1234</small>
Product: * -Products- ▲ MA Only PDP Only MAPD ▼	Newspaper support: <input type="text"/>
Plan: * -Plans- ▲ HMO LPPO SNP-HMO ▼	<input type="checkbox"/> Event will be advertised All events must be submitted to CMS prior to advertising
Contract number: * H8552 - Anthem Medicare Preferred Standard (PPO) ▼	Advertised Date: <input type="text"/> <small>Format: 06/06/2017</small>
<input type="button" value="Add selected contract number to list"/>	
List of contract numbers: * H8552 - Anthem Medicare Preferred Standard (PPO) ▲	
<input type="button" value="Delete selected contract number from list"/>	

Saving an Event

Once the user has appropriately filled in all the required fields, there will be an option to either submit or save the event.

Saving the event will place it in Pending status should the user need to make any changes before submitting it to CMS.

Upon clicking the Save button, the user will receive the following popup message:

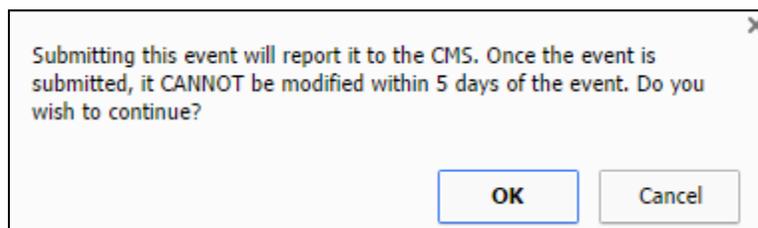


After clicking OK, a popup box saying “Event Saved” will appear. Clicking OK will return the user to the My Sales Events page with a notification that says “Event [name of event] has been created.”

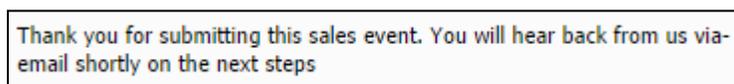
The user will then receive an email detailing the appropriate steps to take in order to submit the event.

Submitting an Event

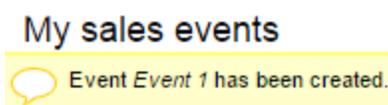
Click the Submit event button that appears at the bottom of the form. The following alert will appear when Submit event button is clicked:



Click OK to submit. The following message will appear:



Click OK to return to the My Sales Events page. At the top of this page, a notification will appear that says “Event [Name of Event] has been created.”



A submitted event email will be sent to the registered email address.

Please note an alert will appear when a duplicate event is attempted to be submitted for approval.

 An event with this Date, Time and Venue already exists. Please review submitted events to ensure you are not submitting a duplicate event

Alert Text includes:

“An event with this Date, Time, and Venue already exists. Please review submitted events to ensure you are not submitting a duplicate event”

Modifying an Event

In addition to the same functions as the Create event form, the Modify event form will behave differently in certain instances.

Along the top of the Modify sales event form are two tabs: Edit and View Change History.

- The Edit tab contains the sales event information to be modified.
- The View Change History tab contains the change log for the selected event (See Logging section below).

Fields are filled in with current values if available from the original event. The following Event Information Fields cannot be modified in an existing event:

1. Event Name
2. Product Year
3. Product
4. Plan
5. Contract Number

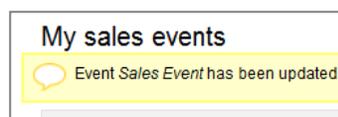
All other fields should be editable.

Events may be modified to a date within the same month only (providing it is not a past date or is not within compliance guidelines for changing the event). If you want to modify an event for a future month you must cancel that event and submit a new one with the future month date.

After making changes, click the Submit event button at the bottom of the form. In the popup alert, click either OK or Cancel.

OK – triggers popup alert: "Are you sure you want to modify this item?"

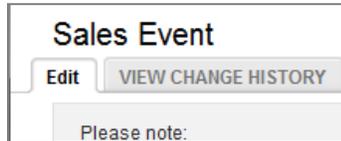
Click OK again to return to My Sales Events page with notification at top of page:



Cancel – Returns user to modify event page

Logging

All edits/modifications on each event will be tracked on a change log with the link to “VIEW CHANGE HISTORY” tab located within the Edit Sales Event form.



Change log displays as table with the following data

Header: ‘Change Log for Event # [event id number in system]’

Columns

Editor – name of user who performed edits

Action Date – date of change

Action Performed – ‘Event edited’, ‘event submitted’, ‘event cancelled,’ etc.

Details – details of change (if any)

The image shows a screenshot of a web application interface. At the top, there are navigation links: "Home", "Create event", "My sales events", and "Certification Portal". Below these links, the title "Change Log for Event #3624" is displayed. There are two buttons: "Edit" and "VIEW CHANGE HISTORY". Below the buttons, the text "Current state: submitted to cms" is shown. The main content is a table titled "Change Log for Event #3624" with the following columns: Editor, Action Date, Action Performed, and Details. The table contains several rows of data, each representing a change to the event.

Editor	Action Date	Action Performed	Details
admin	Fri, 09/07/2012 - 8:47pm	Event submitted to cms	
634554675768678...	Fri, 09/07/2012 - 2:54pm	Event modified	
634554675768678...	Wed, 09/05/2012 - 5:52pm	Event submitted to cms	
634554675768678...	Wed, 09/05/2012 - 5:25pm	Event modified	
manager	Fri, 08/31/2012 - 9:20pm	Event submitted to cms	
634554675768678...	Fri, 08/31/2012 - 2:12pm	Event updated	
634554675768678...	Fri, 08/31/2012 - 2:05pm	Event approved	
634554675768678...	Fri, 08/31/2012 - 2:05pm	Event Edited (pending)	

User Event Listing Page (My sales events)

[Home](#) [Create event](#) [My sales events](#) [Certification Portal](#)

My sales events

Please note:

Formal and Informal Sales Events must be reported.
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 Anthem requires all agents to report sales prior to advertising the event or more than ten (10) calendar days prior to the event's scheduled date, whichever is earlier.
 Anthem requires updates or cancellations be reported no less than 5 days prior to the scheduled event.
 If an event is scheduled following an [Anthem-recognized holiday](#), updates or cancellations must be reported no less than five (5) days prior to the holiday.

[Create new event](#)

Upcoming events

Certification year

ID ^	Date / Time	Location	Venue	Product	Status	Definitions
50664	Thu. 07/02/2015 08:00 AM - 09:00 AM	PST NY - New York	Venue Name	MAPD	submitted to cms	Cancel Modify Clone
50665	Sat. 06/20/2015 08:00 AM - 09:00 AM	PST NY - New York	Venue Name	MAPD	submitted to cms	Cancel Modify Clone
50667	Tue. 07/14/2015 08:00 AM - 09:00 AM	PST NY - New York	Venue Name	MAPD	submitted to cms	Cancel Modify Clone
50668	Tue. 07/14/2015 08:30 AM - 09:00 AM	PST NY - New York	Venue Name	MAPD	submitted to cms	Cancel Modify Clone
50669	Fri. 07/03/2015 08:00 AM - 09:00 AM	PST NY - New York	Venue Name	MAPD	approved	Update/Withdraw Clone

User past events

Certification year

ID ^	Date / Time	Location	Venue	Product	Status	Definitions
50663	Thu. 06/18/2015 08:00 AM - 09:00 AM	PST NY - New York	Venue Name	MAPD	submitted to cms	Clone
50666	Thu. 07/09/2015 08:00 AM - 09:00 AM	PST NY - New York	Venue Name	MAPD	cancelled	Clone

This Page shows a list (in two sections) of the user's current and past events. The lists have a selectable dropdown to filter events by Certification Year (2017, 2018, etc.) and will display the certification year(s) to which you have access.

Upcoming events

- i) Any event that hasn't occurred yet or is still able to be submitted (i.e. pending within proper timeframe) and isn't deleted or cancelled.

Upcoming events

Certification year

ID^	Date / Time	Location	Venue	Product	Status	Definitions
50664	Thu. 07/02/2015 08:00 AM - 09:00 AM PST	NY - New York	Venue Name	MAPD	submitted to cms	Cancel Modify Clone
50665	Sat. 06/20/2015 08:00 AM - 09:00 AM PST	NY - New York	Venue Name	MAPD	submitted to cms	Cancel Modify Clone
50667	Tue. 07/14/2015 08:00 AM - 09:00 AM PST	NY - New York	Venue Name	MAPD	submitted to cms	Cancel Modify Clone
50668	Tue. 07/14/2015 08:30 AM - 09:00 AM PST	NY - New York	Venue Name	MAPD	submitted to cms	Cancel Modify Clone
50669	Fri. 07/03/2015 08:00 AM - 09:00 AM PST	NY - New York	Venue Name	MAPD	approved	Update/Withdraw Clone

- ii) Status: By clicking the “Definitions” link in the status column, a new window will open with a key explaining the various event status definitions.

Fig1.

Status definitions

Pending status:
 Saved Event. NOT Submitted and has NOT been reported to CMS.

Approved status:
 Approved by Anthem requirements. Submitted to be reported to CMS.

Updated status:
 Updated event submission. Approved by Anthem requirements and submitted to be reported to CMS.

Cancelled status:
 Cancelled event has been reported to CMS.

Will be cancelled status:
 Submitted request to cancel event that has been reported to CMS.

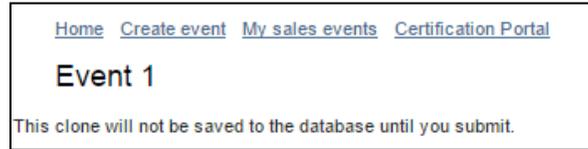
Deleted status:
 Deleted by admin.

Submitted to CMS status:
 Approved by Anthem requirements and reported to CMS.

Modified status:
 Modified event that has been reported to CMS.

- iii) Clone: By clicking the “clone” button, a duplicate of the selected event will be opened in the Create an Event form.

Fig2.



- Be sure to review the text at the top of the homepage in the grey box to ensure compliance with CMS guidelines.
- A cloned event will not be saved to the database until it is submitted.

b) **Past events**

- i) Events that have already occurred, are too late to be submitted*, or have been cancelled.
If an event stays in ‘Pending’ status to the point where it is in the past or no longer able to be submitted under the submission rules (it's less than 10 (ten) days prior to the event date), the event is moved into the past events area.

User past events							
Certification year							
<Any> ▾ <input type="button" value="Apply"/>							
ID▲	Date / Time		Location	Venue	Product	Status	Definitions
50663	Thu. 06/18/2015 08:00 AM - 09:00 AM	PST	NY - New York	Venue Name	MAPD	submitted to cms	Clone
50666	Thu. 07/09/2015 08:00 AM - 09:00 AM	PST	NY - New York	Venue Name	MAPD	cancelled	Clone

- ii) Status: By clicking on the “Definitions” link in the status column, a new window will open with a key explaining the various event status definitions (see Fig1).
- iii) Clone: By clicking the “clone” button, a duplicate of the selected event will be opened in the Create an Event form (see Fig2).

Canceling an Event within 5 days

Only events that have the status of “Submitted to CMS” may be cancelled.

To cancel an event, click on the “Cancel” link next to the appropriate event in the Upcoming Events table with the status of “Submitted to CMS.” You will be directed to a cancellation page with the display “Are you sure you want to cancel [Name of Event]?”



Please note: If the event is cancelled **within** five (5) days of the event date, the following compliance alert appears instead:

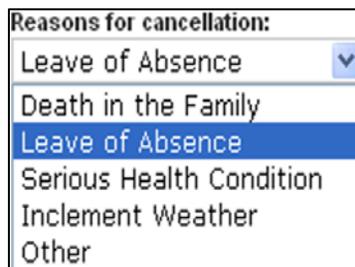
“Compliance Alert!!! This event is being cancelled within 5 days from the original scheduled date and time of the event. Therefore, you must do the following to comply with CMS regulations and Anthem requirements: You must be present at the site of the cancelled sales event at the time the event was scheduled to occur to inform attendees of the cancellation and distribute information about the plan.

You must remain there for at least fifteen (15) minutes after the schedules start time before leaving

If appropriate, you may include notice of alternate event opportunities you have already submitted to us.

A Sales Incident may be generated as a result of this cancellation.”

- Select the reason for cancellation from the dropdown menu:



If “Other is selected from the dropdown menu, a text field appears to enter cancellation reason:

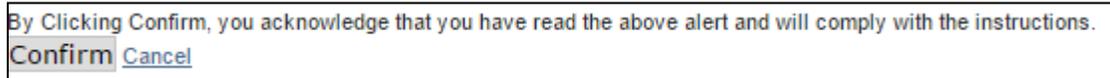


The screenshot shows a form with the following elements:

- A label "Reasons for cancellation:" followed by a dropdown menu.
- The dropdown menu is currently set to "Other".
- Below the dropdown is a label "Other reason for cancellation: *" followed by a large, empty text input field.

Please note the message above the Confirm button:

“By clicking Submit, you acknowledge that you have read the above alert and will comply with the instructions.”



The screenshot shows a confirmation message and two buttons:

- A message: "By Clicking Confirm, you acknowledge that you have read the above alert and will comply with the instructions."
- Two buttons: "Confirm" and "Cancel".

If you click the Confirm button, you will be directed to event information page with notification message at top: “Event is queued to cancel”

A Sales Incident may be generated as a result of this cancellation.
You will also receive an email with cancellation information.

If you click the Cancel button, you will be directed to the event information page.

Cancellation more than 5 days prior to Originally Scheduled Date

Please note: If the sales event is cancelled **more than** five (5) days prior to its originally scheduled date, the popup should state:

Reasons for cancellation:
Leave of Absence ▼

COMPLIANCE ALERT!!! This event is being cancelled more than 5 days from the original scheduled date and time of the event. Thank you for submitting your information on time. You must still do the following to comply with CMS regulations:

You should notify beneficiaries of the cancelled event using the same means you used to advertise the event. For example:
 If an announcement of a sales event was made in the newspaper, then the cancellation of the event should also be announced through the same newspaper. If cancellation cannot be updated in the newspaper, you must provide an alternative method for notifying beneficiaries (e.g., leave a post signage at the event of the cancellation).
 If beneficiaries were identified through personal phone calls, then you should call the beneficiaries to inform them of the cancellation.
 If beneficiaries sent an RSVP for the event, then you should call the beneficiaries to inform them of the cancellation.
 If the announcement of the sales event was through a mass mailing, you should consult with your Account Manager to determine a reasonable way to notify beneficiaries of the cancellation instead of sending another mass mailing within a short time frame.
 Repeated occurrences of event cancellations may result in corrective action.

By Clicking Confirm, you acknowledge that you have read the above alert and will comply with the instructions.

Confirm [Cancel](#)

Select reason for cancellation from the dropdown menu:

- (a) Five options in dropdown menu
 - (i) Death in the Family
 - (ii) Leave of Absence
 - (iii) Serious Health Condition
 - (iv) Inclement Weather
 - (v) Other

If “Other” is selected from dropdown menu, text field appears to enter cancellation reason (limit 50 characters)

Following message appears above Submit button:

"By clicking Confirm, you acknowledge that you have read the above alert and will comply with the instructions."

Confirm: User is directed to event information page with notification message at top: “Event is queued to cancel”

User will receive a notification email.

If you click the Cancel button, you will be directed to the event information page.