

# CustomPoint Frequently Asked Questions (FAQ)

The Wellcare logo consists of the word "wellcare" in a lowercase, teal-colored sans-serif font, positioned inside a white circle. The circle is partially cut off by the right edge of the teal header bar.

## CustomPoint – Materials Ordering Portal

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### **Q: How do I obtain 2022 and 2023 sales and marketing materials?**

CustomPoint is the online source for ordering sales and marketing materials for Medicare Advantage and Medicare Part D plans. By logging into your [\*\*Single Sign-On\*\*](#) portal and selecting the CustomPoint icon, you will be directed to CustomPoint where you can place materials orders, select a preferred shipping location, and track shipments. All 2023 sales materials will be available to order through CustomPoint. Additionally, all 2022 materials will be available in CustomPoint until December 31st.

### **Q: When should I/my organization begin ordering 2023 materials through CustomPoint?**

You may begin ordering 2023 materials as early as September 27, 2022 if you have completed all 2023 contracting and training (2023 AHIP & ACT) certification requirements. There is no limit on the frequency of your orders, there are only quantity limits per item type that may require order justification and market approval. If you were a producing agent last year, keep an eye out for a proactive shipment of materials mailed to you prior to 9/27.

### **Q: How can I receive training on how to order materials in CustomPoint?**

There are several training methods available to brokers on how to order materials from CustomPoint. One option is to attend your market AEP Kick Off meeting. You may also watch the “How To” training videos or review the CustomPoint User Guide that are all available on the CustomPoint Welcome page or in your Centene Workbench portal.

# CustomPoint

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**General Questions** – [Click here to return to menu](#)

**Q: Is it possible to order materials for more than one market/product/plan year at a time?** No, each order can only consist of items for one market, one plan year, and one health plan (product). You must process your order based on the selection made in the Guided Search before you can start a new order for a different market, plan year, or health plan. For example, an order cannot include materials for more than one market, plan years together, or multiple health plans. Further, to order materials for more than one market, both plan years, or for more than one health plan, multiple orders must be submitted. These orders can be submitted back-to-back.

**Q: If there are multiple brokers in one office, is it possible to order for all brokers at once?** Quantities and material versions are assigned to brokers on an individual basis. Brokers must individually order materials through CustomPoint to ensure they have what they need to market and sell according to their license and certification.

**Q: Is there a separate username and password for CustomPoint?**

No, to login to CustomPoint, you must access it through your Wellcare [Single Sign-On](#) (SSO) portal. Please ensure to only access CustomPoint through your SSO portal. Please reference the Broker [Single Sign-On](#) Portal Account Setup Guide for assistance with accessing your SSO portal.

**Q: When I place an order in CustomPoint, what is my default address?**

The default address used for shipping order materials is the shipping address that you have listed with Wellcare. If this address is not the desired shipping location, you have the ability to select a different address or add a new address that you save to your account for future use. Please note: UPS and FedEx are not able to deliver to a PO Box. Only the United States Postal Service is permitted to deliver mail to a PO Box. Depending on the size of your order and PO Box size, delivery might be unsuccessful. We suggest not using a PO Box if at all possible.

**Q: Who do I contact for assistance?**

If you need further assistance with placing your order, please call Broker Support at (866) 822-1339. Wellcare materials can only be ordered through CustomPoint.

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**Accessing CustomPoint** – [Click here to return to menu](#)

**Q: How do I gain access CustomPoint?**

Within 72 hours of completing contracting and certification requirements, you will gain access to CustomPoint. You will have access to order materials based on plan years and markets you are licensed and certified to market/sell. To access CustomPoint, log into your [Single Sign-On](#) portal and select the CustomPoint icon, you will automatically be directed to CustomPoint where you can place orders, select a preferred shipping location, and track shipments.

**Q: If I already have access to CustomPoint through another Health Plan, will I still need to set up a separate username and password?**

To access the Wellcare CustomPoint portal, you must use your [Single Sign-On](#) portal. You do not need to set up a separate username or password with CustomPoint, but to order materials for any Wellcare health plan, you must access CustomPoint through [Single Sign-On](#) (SSO).

**Q: What if I registered/setup my Single Sign-On portal, but I lost the website link?**

After you have registered your [Single Sign-On](#) portal, the login page can be accessed at <https://desktop.pingone.com/cnc-workbench-brk>. Ensure to bookmark/save the Centene PingOne link in your browser favorite or bookmarks.

**Q: Can I access my Single Sign-On portal through my Centene Workbench portal?**

No, your [Single Sign-On](#) portal and CustomPoint are not available through Centene Workbench.

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**What Materials Are Included and Available – [Click here to return to menu](#)**

**Q: What do the PDP Enrollment kits include?**

The PDP Enrollment Guide includes: A Resource Guide/Summary of Benefit, 1 Application and Pharmacy Rx Flyer.

**Q: Why are there states with only PDP materials available?**

The PDP plans are available in all states, including Washington D.C., which is why PDP is listed in the Market selection. You can also find PDP materials under markets that fall in our PDP only footprint where we do not offer Medicare materials. PDP materials are considered a national item when searching for materials such as the Resource Bundle for PDP only states.

**Q: Will the Enrollment Kit include a scope of appointment (SOA) form?**

Yes, the scope of appointment (SOA) form is included in the Enrollment Kit.

**Q: How do I know what materials to order per the plans I am marketing/selling?**

There are thumbnails and descriptions for all materials listing out the plans included in each material, along with extended descriptions for each item.

**Q: Will the personalized paper application barcode pages be available in the Materials Portal?**

No. Please contact Wellcare Broker Support at (866) 822-1339 or submit a support ticket in your Centene Workbench broker portal to request a PDF copy of your personalized paper application confirmation page. Note: The personalized paper application confirmation page can only be used with Legacy WellCare paper applications.

**Q: Do PDP bundles include the EFT / automatic bank payment forms?**

Yes, EFT is a part of all applications this year and will also be available to beneficiaries through the member portal.

**Q: Will there be individual enrollment and summary books for every state?**

While there is no overlap in the books across different states, each book may include multiple plans for that state. “Like plans” have been grouped together in Enrollment Kits to streamline sales materials. For example, you may see a state’s DSNP plan offerings grouped together. Each book can contain up to four (4) plans.

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### **Materials Customization – [Click here to return to menu](#)**

#### **Q: Can the materials be customized and/or printed with broker name, phone number, email address, etc?**

No, customization is not available at this time.

### **Materials Order Limits – [Click here to return to menu](#)**

**Q: What are the limits or caps on the quantity of materials that can be ordered at once?** There are quantity limits per item type that may require order justification and market approval. If your order is routed for Market approval, please allow 72 hours for the order to be approved. Note: Market approvers have the ability to modify and/or approve orders if they exceed material quantity limits.

#### **Q: If you place a second order too soon will it cancel the first order?**

No, there is no limit on the frequency that orders can be placed.

#### **Q: How many Enrollment Kits can be ordered initially?**

The maximum allocation per order is 5 Enrollment Kits for Brokers. Our recommendation is to order the supplies you will need for the season and if you start to get low, you can always order additional supplies. If you run out, there will be an emergency supply stock at our local offices. Note: Orders take 5-7 days for fulfillment and shipment. Order tracking information is available in CustomPoint.

#### **Q: How many HIPAA Packets or Benefit Brochures will you be able to order at a time?**

Any order that exceeds the material quantity limit will route to the market for approval. The market will review and either modify or approve the order. The Benefit Highlights are limited at 10 per broker and HIPAA Packet is 1 per broker. Note: The HIPAA Packet comes in quantities of 10. If you order 1 you will receive 10 forms.

#### **Q: Where do you request to override the quantity?**

There is no need to override quantity. Place the order for the quantity that is needed. Any order that exceeds the maximum will route to the market for approval. The market will review and either modify or approve the order. Rest assured, all Brokers will receive the materials needed to sell.

#### **Q: What is the turnaround time for getting approval for excess quantities?**

Most orders routed for approval will be reviewed within 72 hours.

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**Q: When an order needs to be approved, is there any delay in processing, and will it ship the allowable amount and the overage at a later date?**

Yes, there is potential for delay based upon how long the approval process takes. The order will ship the item as a whole. Items in the order that do not require approval will ship, however, the full quantity of the item that requires approval will not ship until approved. The Market approver has up to 72 hours to review the order.

**Other Ways to Obtain Materials – [Click here to return to menu](#)**

**Q: Am I able to download PDF files and/or print materials from the Materials Portal or do I have to order more?**

Yes. We will have downloadable materials this year in CustomPoint. These materials will be available for download in October.

**Q: If my order hasn't arrived, I'm out of stock, and have a sales appointment can my local office provide emergency supplies?**

Yes, local offices will have inventory available for emergency supplies.

**Q: Will agencies be able to order for their downlines?**

Materials are being pushed to select agencies. For all other agencies, the principal can order materials and distribute as needed.