Accessing the CustomPoint Materials Portal is easy! From your WellCare single sign-on portal homepage, select the CustomPoint icon to be automatically routed to the materials portal within a new browser window.

*CustomPoint is available 24 hours after all 2020 certification requirements are complete.

**Helpful Tip!** For assistance setting up and/or accessing your single sign-on portal, please reference the Agent Single Sign-On Portal Account Setup Guide located on the WellCare Agent Resource Center.
NOTE: After logging into Custom Point from your single sign-on dashboard, you will be directed to the Materials Portal homepage. The homepage serves as a point of communication of news, FAQs and messages about the site, as well as a dashboard of recent activity, including the last 7 orders placed.

NOTE: When using the system, use only the navigation options provided within the screens. Using your browser back and forward, and even potentially, reload buttons can cause confusion with the ordering session that is being tracked by the system, so this should be avoided.
**STEP 1:** Under Guided Search, select the dropdown menu and choose the product you would like to order materials for, CCP or PDP.
**STEP 2:** Select the Market you would like to order materials for underneath Plan Year (only Markets you are certified in will populate). Once the market is selected, press the find button.
- For this example, we will use the FLE market

**STEP 3:** Use filters on the left side of the screen to help define your search. Select each material you would like to order by clicking on the 🦄 icon next to that item in the order column. When the item is in your cart, the icon will change to 🦄.
**STEP 4:** In order to locate the counties that are included in the plan(s) for this material, please click below the thumbnail on “Show full size image”.

**NOTE:** When placing orders, input and submit orders for CCP Materials separate from PDP Material orders. CCP and PDP Materials cannot be combined into one order.
NOTE: The first time you add an item to the cart, you will be asked to set a preference for staying on the ordering page, or going to the shopping cart.

STEP 5: In the shopping cart, enter the desired quantity for each item
- If you no longer need that item in the order, click “Remove Item”
- If the quantity exceeds the allocation for that material, a warning message will be displayed indicating the order will route for approval

NOTE: If you need to order MA and PDP materials, you must place them as separate orders (for tracking purposes).
NOTE: From the cart, you can Save Order (to resume later), Continue Shopping (to go back and look for other items to put in the cart), or Check Out (to proceed with shipping information and submit for approval). These three selections are located on the bottom of the webpage.
**NOTE:** If you choose to Save Order along the way (from shopping cart on), you will be asked to give the order a name, and then click “Save”. To resume a Saved Order, access through the Orders menu bar located underneath the WellCare logo, or the alert/reminder link on the right side of the Home page.
**Materials Ordering Guide**

**STEP 6:** When you click “Check Out”, a new webpage with the Delivery Options screen will appear with the address of the location you want the materials sent to. You can add a Ship to Attention field if needed. After every field has been filled out, click the green NEXT button.

**NOTE:** If necessary, you can change the address source and manually enter an address. Any address will be checked for deliverability with a call to a USPS web service. If you manually enter an address, you can NOT enter a PO Box.
STEP 7: Review your contact information and make sure your full name, phone number and email address are correct (the email address entered will receive an order confirmation email once the order has passed the approval stage). Once you have verified your information, click the green NEXT button.

STEP 8: If the allocation was exceeded for any of the items ordered, a Routing Justification webpage will appear. In the Justification text box, type a note to the approver at your local WellCare office explaining the quantity need. Once you have provided your justification, press the green NEXT button.

NOTE: This screen will not appear if you haven’t exceeded the allocation.
**STEP 9:** The Order Summary screen recaps where the order is shipping to and what was ordered. There are links to save the order, submit the order or review a printable summary of the order. If you are ready to submit your order, press the green NEXT button.

**NOTE:** If you select SUBMIT ORDER, a Confirmation screen will appear with “Order Routed” and a sales reference number. The order will be put into a queue to be reviewed by the Market Leader. You will not receive an email notification about the order until after the order is approved as is, approved with edits, or denied.
For general support and any questions related to Agent contracting, certifications, training, commissions or assistance on placing materials orders, please contact the general Broker Support line at 1-866-822-1339.

The support team will triage all questions and determine if the issue is related to a technical issue with CustomPoint. If so, then a phone number and email will be provided to contact regarding the issue.