

Marketing Express User Guide

This secure website allows you to access UPMC *for Life* marketing materials and customize them with your name, contact information, picture, and even your upcoming seminars!

Login

- Use **Google Chrome** (other web browsers are not recommended).
- Go to **upmchp.us/mxportal**.
- Your user ID is the email address that UPMC has on file for you.
- Your password is **UPMCBrokerAgent123**.
- You will be prompted to change your password after your initial login.

Tip: Save this site as a favorite on your web browser for easy access in the future.

Access

- Select **Catalog** from the homepage, then click on **Marketing Materials**.
- Click on the **Medicare Broker Materials** folder to access the marketing pieces, then select the correct year's **Marketing Material** folder.
- Select the name of the flier or postcard, or click **Customize** to begin personalizing the piece.

Create

- Fill out the variable fields with your personal information and then select **Update**.
- Click **Open PDF** and confirm your information is correct.
- To save your custom marketing piece, select the **Digital Delivery** and follow the prompt to download and save the file.
- **Print your personalized materials to help strengthen your brand!**

Please note: All marketing pieces include disclaimers that are required by UPMC *for Life* and The Centers for Medicare & Medicaid Services (CMS). Make sure to always include all pages when distributing materials to Medicare beneficiaries.

The screenshot displays the 'Product Information' section for a '2020 Personalized Agent Flier - 19MC893115'. Below this, there's a 'Version This Product' link and a note about required fields. The main area is divided into two columns: 'Form' and 'Proof'. The 'Form' column contains input fields for 'First Name*', 'Last Name*', 'Phone Number*', and 'Email Address'. The 'Proof' column shows a preview of the flier with the heading 'Get personal help and support' and a list of services. At the bottom, there's a 'Digital Delivery' button and another note about required fields.

Converge User Guide

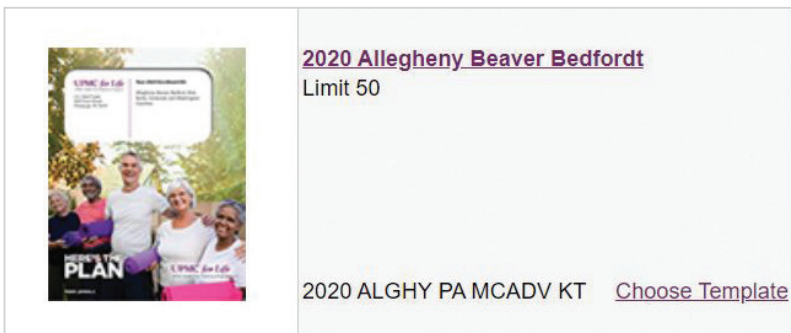
This site allows you to order UPMC *for Life* enrollment kits, Summaries of Benefits, seminar PowerPoints, and more—directly through the secure website.

Log in

- Visit <https://upmchp.klicorders.com> to log in.
- Your username is the email address that UPMC has on file for you.
- All current eCommerce and new users will have an initial password of **Welcome1**.
- New users can setup their account by visiting the log-in screen and clicking the **Create an account** button.
- You can reset your password at anytime by following the **Forgot your password?** prompt on the log-in screen.

Order

- Use the **Browse products** button to search for an item by category or type in a keyword/description in the search engine bar at the top of your screen.
- For each product you would like to order, enter the quantity and then click on the **Add selected items to cart** button.
- When you are ready to place your order, click the shopping cart icon located at the top of any page.
- From there you can revise quantities, remove items from your cart, continue shopping, or check out.



Check out

- From the shopping cart page, enter/select the shipping address.
- The shipping method has a default of UPS Ground. You will not be able to request overnight shipping through this site. If you need materials overnighted, please contact your broker manager.
- Confirm your order information is correct.
- Select **Place Order** to place your order.
- You will receive a confirmation email with your order summary shortly after you submit your order.

Ordering tips:

- Access **My Account** from the navigation bar to manage your profile and saved shipping information.
- Click the **Order History/Check Status** button on the homepage to view all orders.
- Select the **Hold This Order** function to save items in your shopping cart for future checkout.

Questions? If you have any questions on how to navigate the site, place an order, or check the status of an open order, please contact your broker manager.