Onboarding Guide

FOR NEW AGENTS

Version 8/2024*

Be sure to reference Producer World the most current version.

Aetna Medicare Broker Services: 866-714-9301 | brokersupport@aetna.com

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Introduction to onboarding

Steps to complete onboarding

We'll explain each step in greater detail in the next sections.
1. Get started by engaging the link in your onboarding invitation email.
2. Register and/or log in to our Producer World website and confirm your demographics.
3. Indicate if you're an agency principal or an individual - and complete a W9, if required.
4. Advance through the tabs in our onboarding system to complete your forms.
5. Submit your case to Aetna Medicare Broker Services.

Know before you go

The link in your onboarding invitation will expire after sixty (60) days.
After that time, you'll need to contact your recruiter for a new invitation.

You may have only one active case.
This means you'll need to cancel a previous Medicare case you started but don't intend to complete or wait for a commercial case to be completed before submitting your Medicare case.

We recommend using the Google Chrome web browser for onboarding.
If you experience any issues, try clearing your internet browsing history or using a private browsing window.
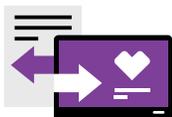
We'll pull your licenses from the National Insurance Producer Registry (NIPR).
The minimum licensing requirement to onboard is a resident state license with the proper line of authority for Medicare. If you're onboarding an agency, your agency must also be properly licensed according to state law.

Standard processing time is generally quick but can vary.
Processing will not begin until your certification is validated. Processing can take as little as 24 hours but can vary depending on completion of state and federal background checks.

Getting started

How to activate your case and complete the Producer World steps

1. Your recruiter will create a case in our system which will trigger an email invitation from Aetna Medicare. **Click the link within the email to activate your case.**
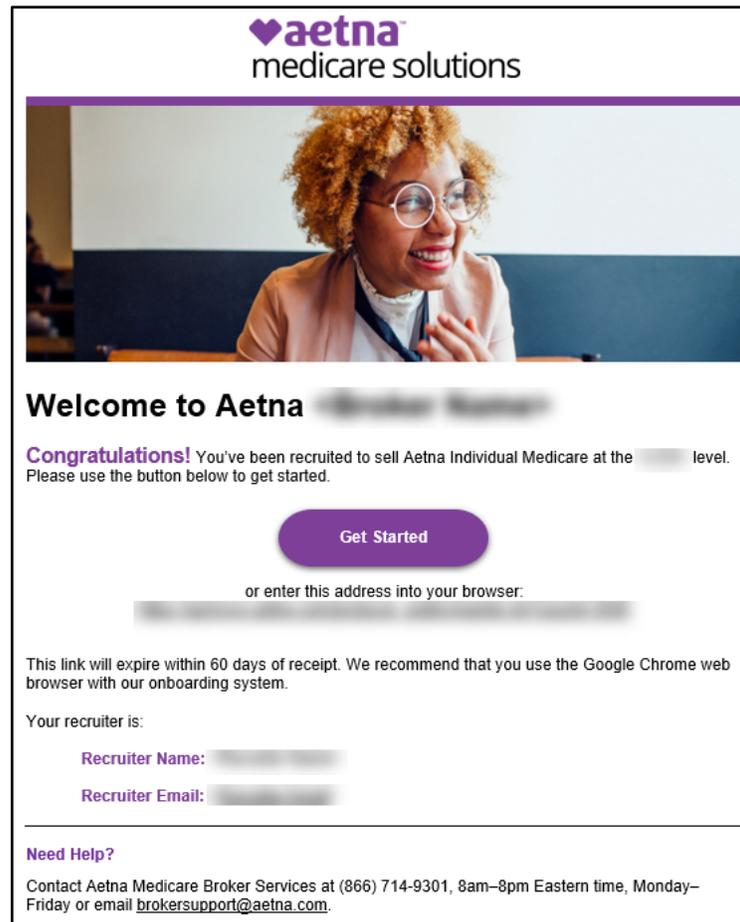
2. Indicate if you already have an Aetna Producer World account.
   - If **yes**, log in with your existing credentials
   - If **no**, you'll be guided through registration and log in

3. Confirm or update the demographics we pull from NIPR. Click "**Save & continue**".

4. Indicate if you're onboarding as an agency principal (vs. as an individual).

Will you be contracting as the principal of the agency?

Yes — If yes, we will retrieve your agency licensing records from NIPR

No — If you are DBA (Doing Business As) with no agency license, select no and contract as an individual

⭐ Know before you go

Select **yes** only if...	Otherwise, select **no** if...
You're the principal of your own agency and want commission paid to it (note: your agency must be properly licensed per state guidelines)	You're an individual and want commission paid to yourself or if you're DBA (doing business as) with no agency license

5. If we require you to submit a W9, you'll be presented with a form to complete.

For agencies: Enter the firm name as it appears on *your* firm's tax return (this may not match your *recruiter's* information). If you haven't filed a tax return yet for your firm, refer to IRS letter 147C, which confirms the legal name and Tax Identification Number (TIN) combination that exists within their systems.

6. Click "**Continue**" to move from Producer World to our onboarding system.

Your W9 submission has been accepted. Please follow the link below to complete your case.

Continue

Completing your producer application

How to complete your forms in the onboarding system

You'll be guided from Producer World to the Medicare onboarding system where you'll complete your application through a **series of tabs**. The tabs will be customized for your onboarding scenario.

Home page

Click the hyper-link to open your case.

General tab

This tab reflects your demographic information.

Licenses tab

Review your NIPR license records. Report any discrepancy to us at brokersupport@aetna.com.

Background Questionnaire tab

Answer all the required questions and proceed to the Background Authorization tab.

Background Authorization tab

1. Click the "**Start**" electronic sticky tab to open the form.

2. Click "**Next**" to review the credit report option. You can use the inside scroll bar to navigate through the material presented.

3. Click "**Next**" again to go to the Background Check Form and complete it.

4. Scroll to the bottom to electronically sign it.
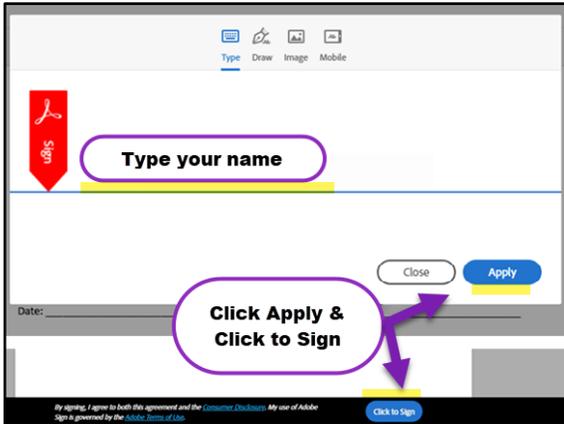
Banking Information tab

If we require banking information, you'll need to complete the Banking Information tab.

Contracts tab

1. Click the "**Start**" electronic sticky tab to begin.
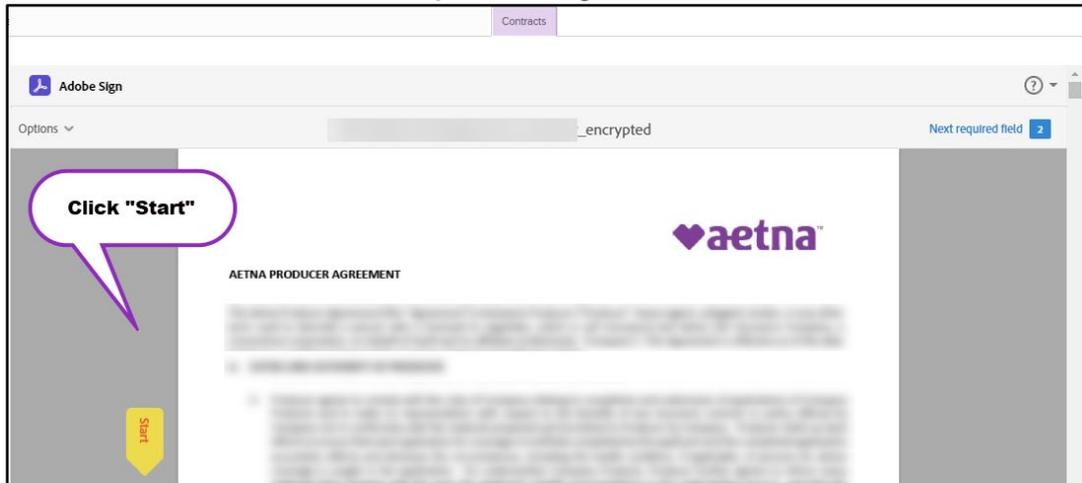
2. Click "**Next**" to jump to the signature form and complete it. You can use the inside scroll bar to navigate through the agreement.
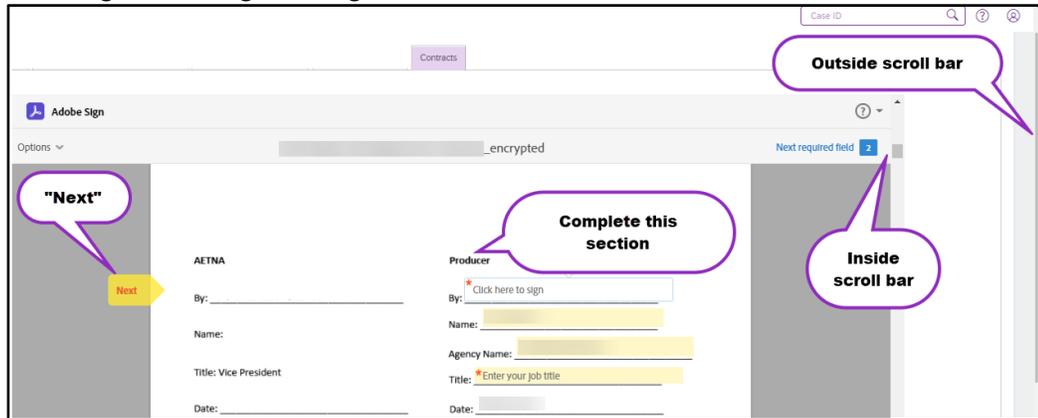
3. Scroll to the bottom to electronically sign it.
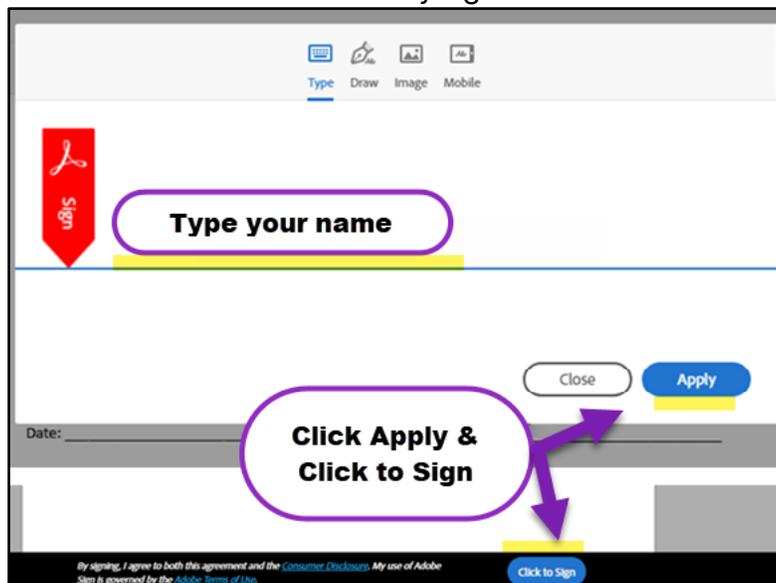
Principal Changes tab (if required)

If you're contracting an agency that is already contracted with us under a different principal, you'll be asked to upload a principal change letter. Learn more about our principal change guidelines on Producer World.

Submitting your case

1. Click "**Submit to Aetna Medicare**."

2. Click "**Yes**" to confirm.

Important next steps

What happens after you submit your case?

Email confirmation of your submission

Certification is validated before processing

Background investigation, if needed

Email approval of your case (or notice of other status)

You must verify you're "ready to sell"
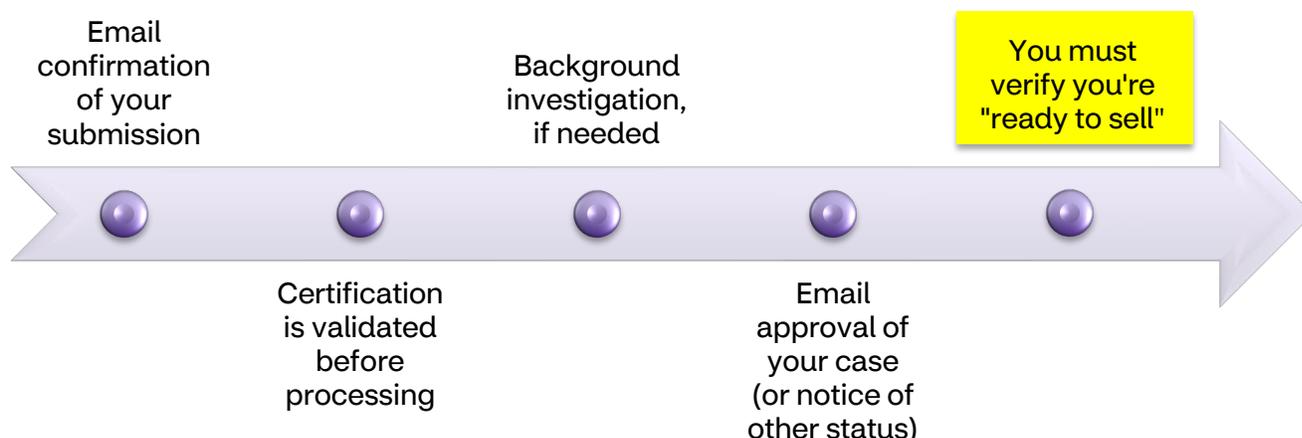
How to verify you're "ready to sell"

Before selling Aetna Medicare products, you must complete all certification and licensing requirements and verify that you're "ready to sell" (RTS) with us.

3-ways to verify your RTS status:

- Log in to Producer World and visit the Individual Medicare page
- Contact your recruiter
- Contact Aetna Medicare Broker Services at 866-714-9301 or brokersupport@aetna.com

What you need to know

You should **actively verify** your RTS status prior to selling in each state where you conduct business. Your RTS status is subject to change based on your **continuing to meet RTS requirements** as outlined on Producer World.
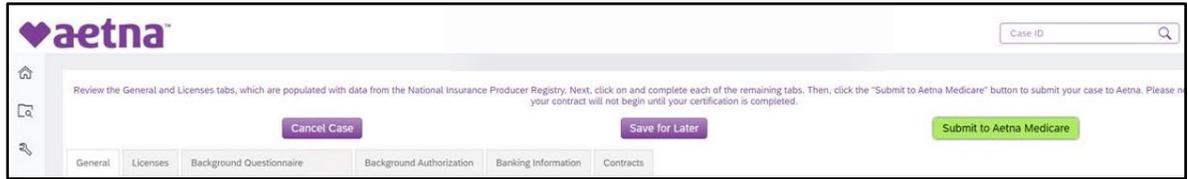
If, at any point, you fail to meet any licensing requirement, including a lapse, expiration, suspension, revocation, termination, or any other action taken by the Department of Insurance (DOI) or other entity, you must stop all selling activities and notify Aetna immediately.

Email notifications

Automated onboarding notices are sent from donotreply@contracting.aetna.com to the email associated with your case. Copies of the notices are sent to the associated recruiter. Below are some of the notifications you may receive, depending upon your scenario:

|		
Invitation Sent weekly until case is activated (to 60 days)	**Reminder** Sent weekly if activated but not submitted (to 90 days)	**Case Submission** Sent upon successful submission of your case
Additional Information Needed Sent if needed to collect additional information	**Contract is being held for processing** Sent if using the Notice of Intent to Transfer option to change upline to advise of the 90-day waiting period	
Approval Sent upon approval by Aetna Medicare	**Cancelation** Sent upon cancelation by you or your recruiter	**Rejection** Sent upon rejection by Aetna Medicare

Understanding case statuses

An *invitee* can check the status of their case or cancel it through 5. Once it's under review, they must contact their upline or Broker Services. A *case creator* can check the status of cases at any time and cancel through status 6. After that, Broker Services may reject it if needed.

| Agent action or awaiting validation		
Producer World Processing		The agent must click the link to activate their case. Then they'll register and/or log in to Producer World and, if applicable, complete a W-9 before transferring to the onboarding system.
Producer Application		The agent must complete their application in the onboarding system and submit their case.
Incomplete		Additional information is needed from the agent, which has been outlined in an email notice from Broker Support.
Certification Validation		All cases will be validated for certification before processing. If certification is not completed, the case will pend here.
Awaiting Background Report		A completed background report has not yet been returned to Aetna Medicare.
Aetna review		
Awaiting Business Review		The case is ready to be assigned for processing.
Review Application		The case has been assigned for processing.
Notice of Intent		A Notice of Intent-Transfer Release Form was submitted with the case; 90-day waiting period begins from the date of submission.
Approval Requested		The case has been approved and data is being fed.
Exception		The case information did not feed. A business team member will manually review and correct the issue or reject the case.
Onboard Complete		The case has successfully been completed.
No longer active		
Canceled by the Agent	✕	The agent or recruiter canceled the case.
Rejected by Broker Services	✕	The case has been rejected after Aetna Medicare review.

Managing a submitted case

How to check the status of a submitted case

Log in to Producer World and navigate to the onboarding system:

1. Log in to Producer World
2. *From the top menu bar, go to Individual Medicare*
3. From the quick links menu, select **"Onboarding: manage downline cases"**
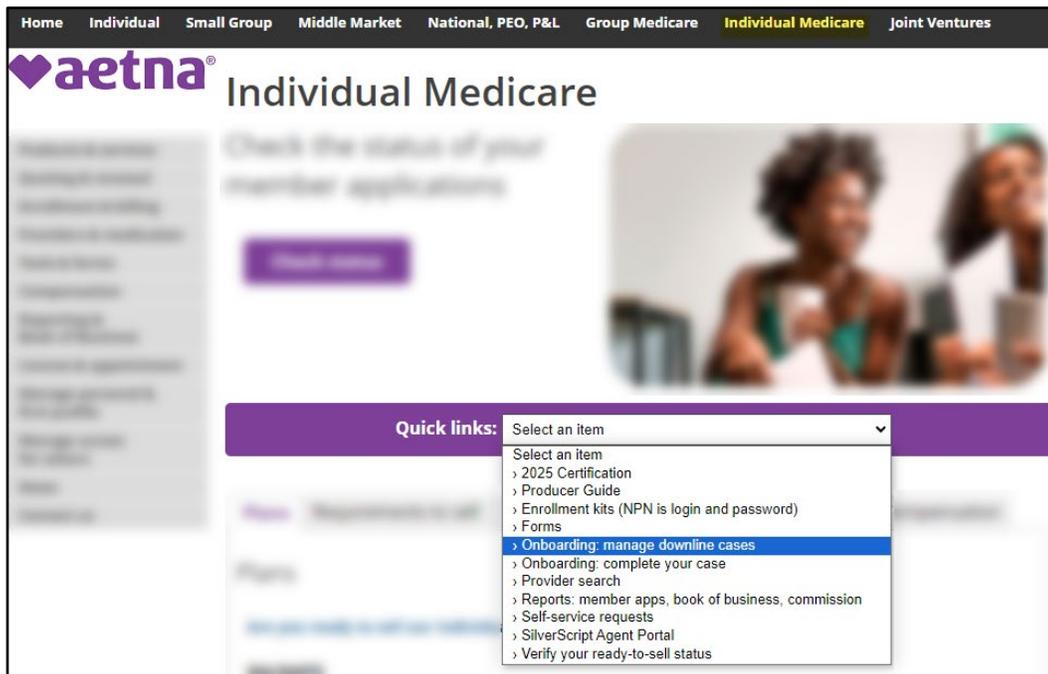
From the *Home* page of the onboarding system, locate your case and note the status.
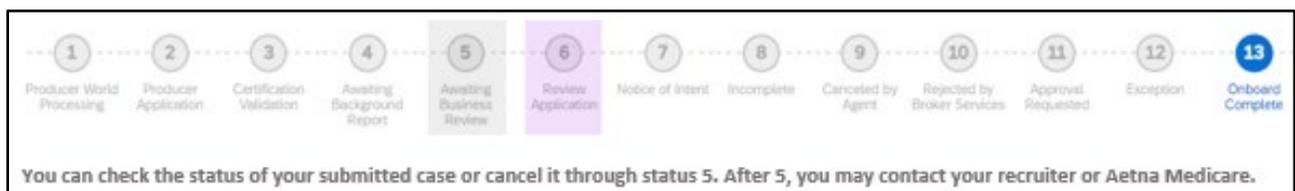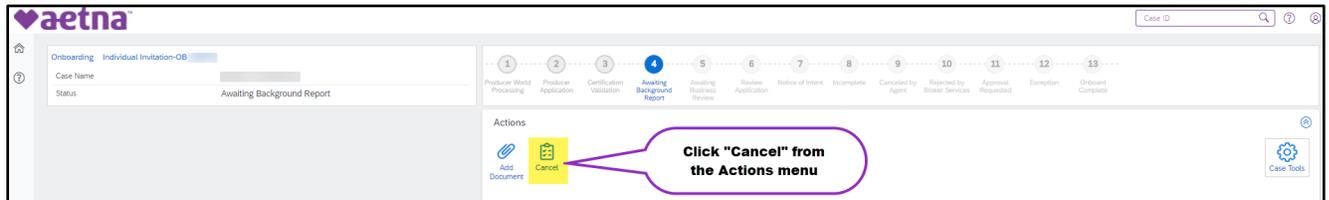
How to cancel a submitted case

From the *Home* page of the onboarding system, open your case by clicking the hyperlink.

Click "**Cancel**" from the *Actions* menu.

An email will generate to you and a copy will be sent to the associated recruiter.

How to attach a document to a submitted case, if applicable

From the *Home* page of the onboarding system, click the hyperlink to open your case.

From the *Actions* menu, click "**Add Document**" then upload your document.

Managing an unsubmitted case

If you have not activated your case ...

If you have activated your case and registered for Producer World ...

Return to your onboarding invitation and follow the link
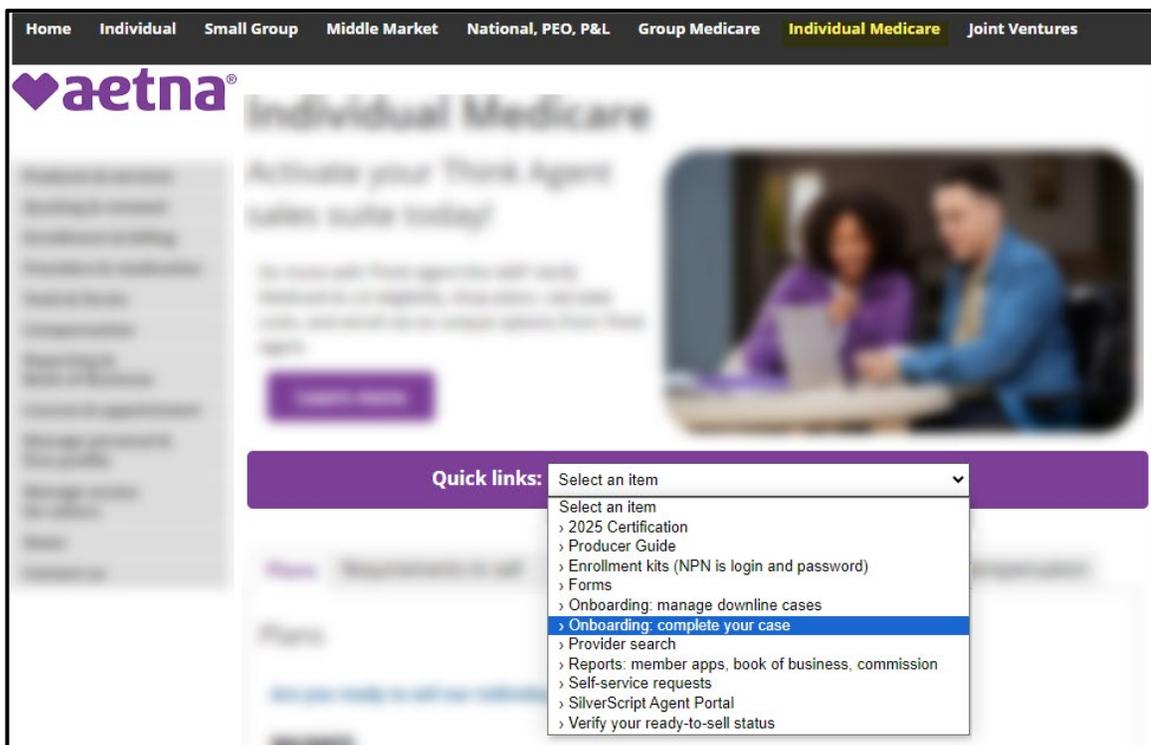*Contact your recruiter if you need it resent*

Log in to Producer World and use Quick Links to complete your case

How to return to an unsubmitted case

Log in to Producer World and navigate to the Medicare Contract Maintenance page:

1. Log in to Producer World
2. *From the top menu bar, go to Individual Medicare*
3. From the quick links menu, select **"Onboarding: complete your case"**

If you have multiple cases, you may cancel one.

Otherwise, select your active case.

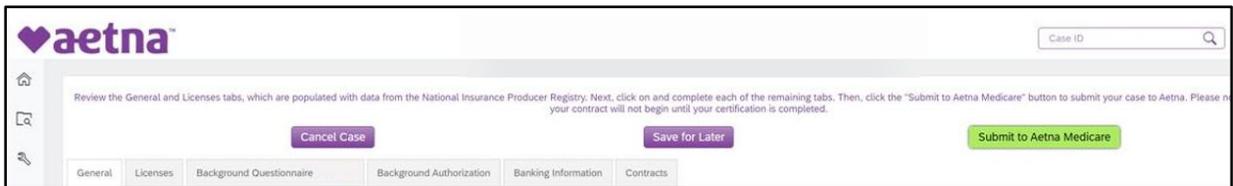Click "**Continue**" to move to the onboarding system.

How to resume an unsubmitted case

Click the *Case Key* hyperlink to resume and complete any outstanding steps.
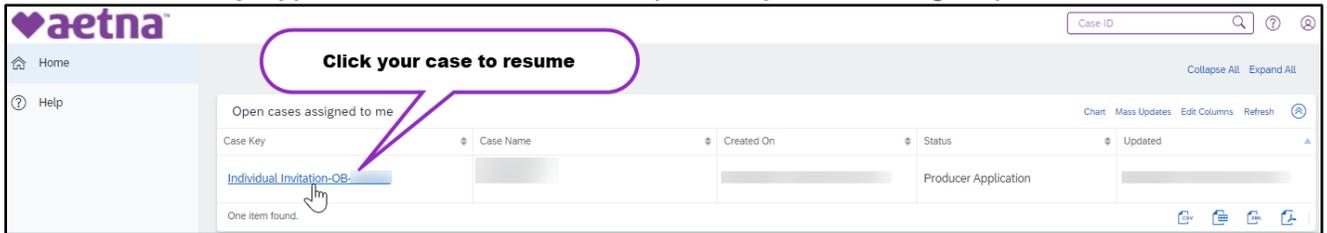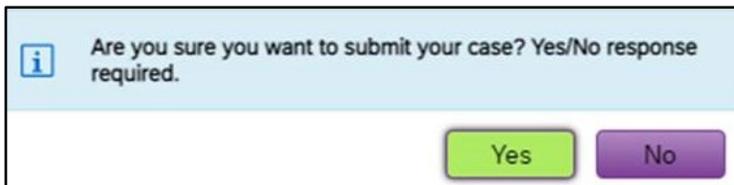

How to submit your case

1. Click "**Submit to Aetna Medicare**."

2. Click "**Yes**" to confirm.

Agency management on Producer World

If you're contracting with us as an agency principal, you'll automatically gain access to your agency's profile and reporting on our Producer World website upon case approval. <u>You can manage your agency's information or designate that role to someone else.</u>

Access privileges include things like:

- Updating the agency profile
- Updating the agency electronic funds transfer (EFT)
- Viewing enterprise-wide agency reports
- Managing agency onboarding
- Quoting | Enrollment | Billing (QEB) for commercial business

You'll also be able to <u>invite others to onboard</u> as a downline of your agency, if applicable.

Help

How to contact us

Contact Aetna Medicare Broker Services at (866) 714-9301, 8am–8pm Eastern time, Monday–Friday or via email brokersupport@aetna.com.