



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.



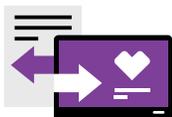
You may have only one active case.

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.



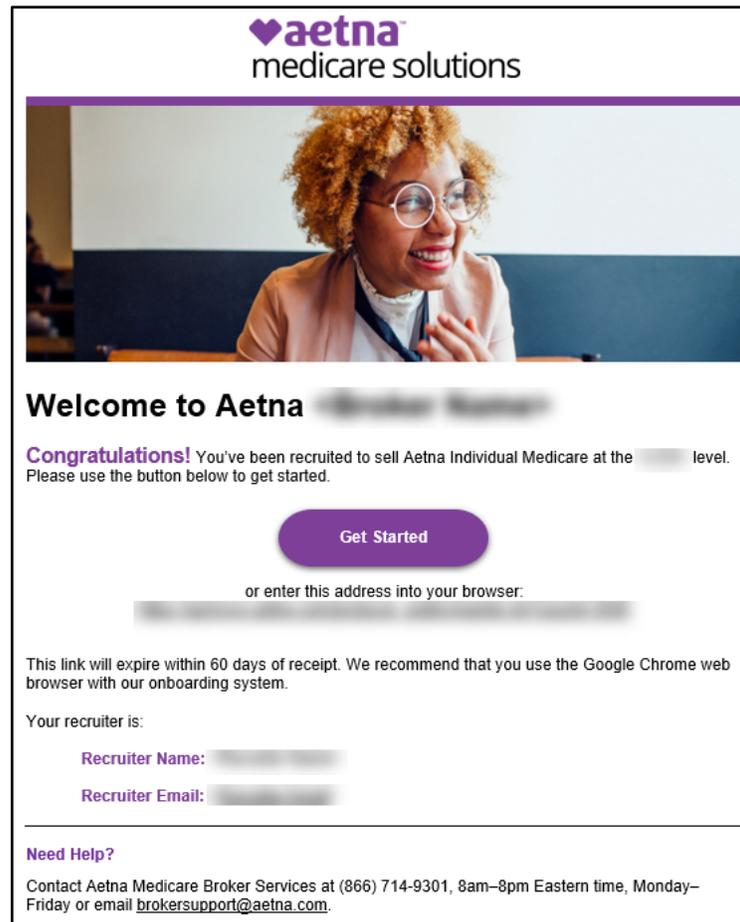
Standard processing time is generally quick but can vary.

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...

You're the principal of your own agency and want commission paid to it (note: your agency must be properly licensed per state guidelines)

Otherwise, select **no** if...

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.

The screenshot shows the Adobe Acrobat Sign interface. A central white box contains the text "Your name" in a cursive font. To the left of this box is a red arrow pointing downwards with the word "Sign" written vertically inside it. Below the signature field are buttons for "Clear", "Close", and "Apply". The background shows a document with "Part II" and "General instructions" visible.

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.

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.

The screenshot shows the Aetna home page with a navigation menu on the left containing 'Home' and 'Help'. A search bar for 'Case ID' is at the top right. The main content area displays 'Open cases assigned to me' with a table of cases. A callout bubble points to a case link.

Case Key	Case Name	Created On	Status	Updated
Individual Invitation-OB-			Producer Application	

One item found.

General tab

This tab reflects your demographic information.

The screenshot shows the 'General' tab of the producer application. It features a navigation bar with tabs: 'General', 'Licenses', 'Background Questionnaire', 'Background Authorization', 'Banking Information', and 'Contracts'. A callout bubble points to the 'General' tab.

Cancel Case Save for Later Submit to Aetna Medicare

Review the General and Licenses tabs, which are populated with data from the National Insurance Producer Registry. Next, click on and complete each of the remaining tabs. Then, click the "Submit to Aetna Medicare" button to submit your case to Aetna. Please note processing of your contract will not begin until your certification is completed.

Producer Demographics

First Name	Address Line 1
Middle Name	Address Line 2
Last Name	City
Suffix	State
Date of Birth	ZIP
NPN	Producer Business Phone
Contact Email	Producer Cell Phone

Licenses tab

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

The screenshot shows the Aetna web portal interface. At the top, there is a navigation bar with the Aetna logo and a search bar. Below the navigation bar, there is a message: "Review the General and Licenses tabs, which are populated with data from the National Insurance Producer Registry. Next, click on and complete each of the remaining tabs. Then, click the 'Submit to Aetna Medicare' button to submit your case to Aetna. Please note processing of your contract will not begin until your certification is completed." Below this message, there are three buttons: "Cancel Case", "Save for Later", and "Submit to Aetna Medicare". The "Licenses" tab is selected, and a yellow banner reads: "Review your NIPR license records below. Report any discrepancy to Aetna Medicare Broker Services at brokersupport@aetna.com." Below the banner, there is a table titled "Producer NIPR Active Licenses". The table has columns for License State, License Number, License LOA, Effective Date, Expiration Date, and Residency Status. There are two rows of data, but the content is blurred. At the bottom of the table, it says "2 total rows, displaying from 1 to 2".

Background Questionnaire tab

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

The screenshot shows the "Background Questionnaire" tab. It contains several sections of questions, each with radio button options for "Yes" and "No".

- Regulatory Actions**
 - Have you ever had an insurance or securities license denied, suspended, cancelled, or revoked? * Yes No
 - Has any regulatory body ever sanctioned, censured, penalized, or otherwise disciplined you? * Yes No
 - Has any state, federal or self-regulatory agency filed a complaint against you, fined, sanctioned, censured, penalized or otherwise disciplined you for a violation of their regulations or state or federal statutes? * Yes No
- Felony Offense**
 - Have you ever been convicted or plead guilty or nolo contendere (no contest), served any probation, paid any fines or court costs, had charges dismissed through any type of first offender or deferred adjudication or suspended sentence procedure, or are any charges currently pending against you for any FELONY offense? * Yes No
- Misdemeanor Offenses**
 - In the last 7 years, have you been convicted or plead guilty or nolo contendere (no contest), served any probation, paid any fines or court costs, had charges dismissed through any type of first offender or deferred adjudication or suspended sentence procedure, or are any charges currently pending against you for any MISDEMEANOR offense other than a minor traffic violation? * Yes No
- Other Information**
 - Are you currently a party to any litigation or a subject of any investigation(s)? * Yes No
 - Have you ever had an appointment with another insurance company denied or terminated for cause? * Yes No

Background Authorization tab

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

Background Authorization

Adobe Sign

Options ▾ Background Authorization_..._encrypted Next required field 5

Click "Start"

DISCLOSURE REGARDING CONSUMER REPORTS

Start

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

Case ID

Adobe Sign

Options ▾ Background Authorization_..._encrypted Next required field 5

NOTICE REGARDING CONSUMER CREDIT REPORT PURSUANT TO CALIFORNIA LAW

"Next"

Next

Outside scroll bar

Inside scroll bar

The Company intends to obtain a consumer credit report on you for the permissible purpose under California Labor Code 1024.5 checked by the Company below:

X The job for which you are applying (or if current employee, already occupy) is a position that involves regular access, for any purpose other than the routine solicitation and processing of credit card applications in a retail establishment, to all of the following types of information of any one person:

- (A) Bank or credit card account information;
- (B) Social security number; and
- (C) Date of birth.

YOU, THE CONSUMER, MAY RECEIVE A FREE COPY OF ANY CONSUMER CREDIT REPORT RECEIVED BY THE COMPANY ABOUT YOU BY CHECKING THE BOX TO THE RIGHT OF THIS STATEMENT.

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

Adobe Sign

Options ▾ Background Authorization_..._encrypted Next required field 5

Complete the form

Next

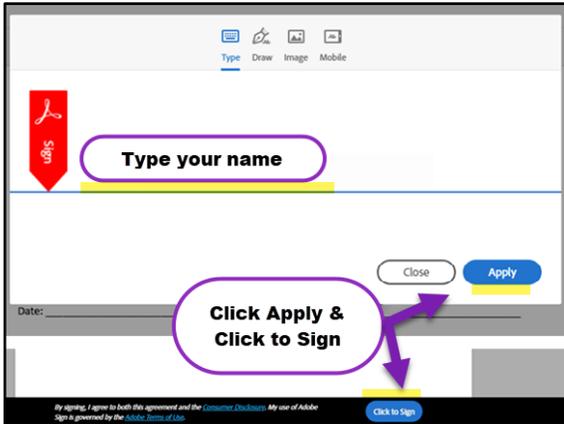
INFORMATION ABOUT YOU REQUIRED FOR BACKGROUND CHECK

Last name: First name: Middle name:
 I have no middle name

Other Names/Alias
Include Maiden or Name Changes, No Direct Derivatives Ex: Susan vs. Sue, David vs. Dave

*Social Security: *Date of Birth:
**This information will be used for background screening purposes only and will not be used as hiring criteria.*

4. Scroll to the bottom to electronically sign it.



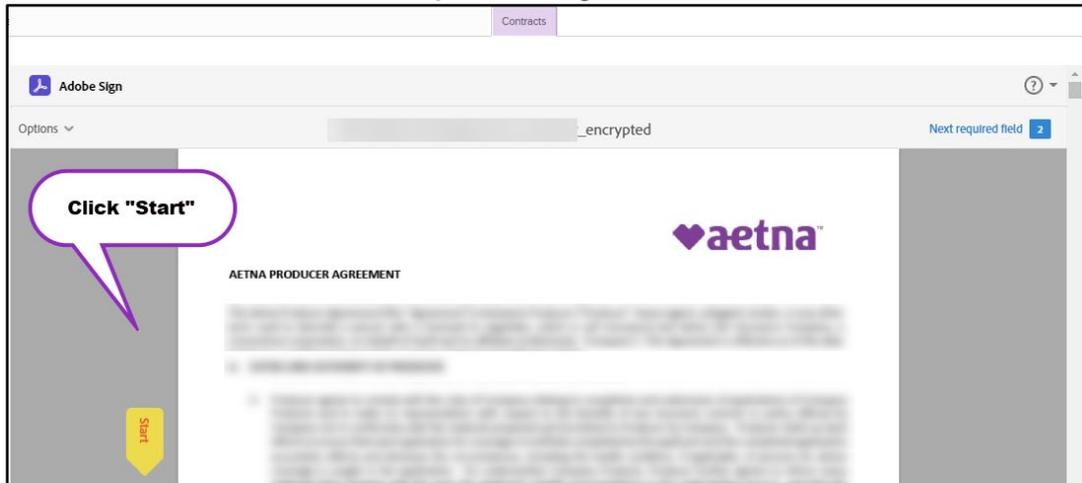
Banking Information tab

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

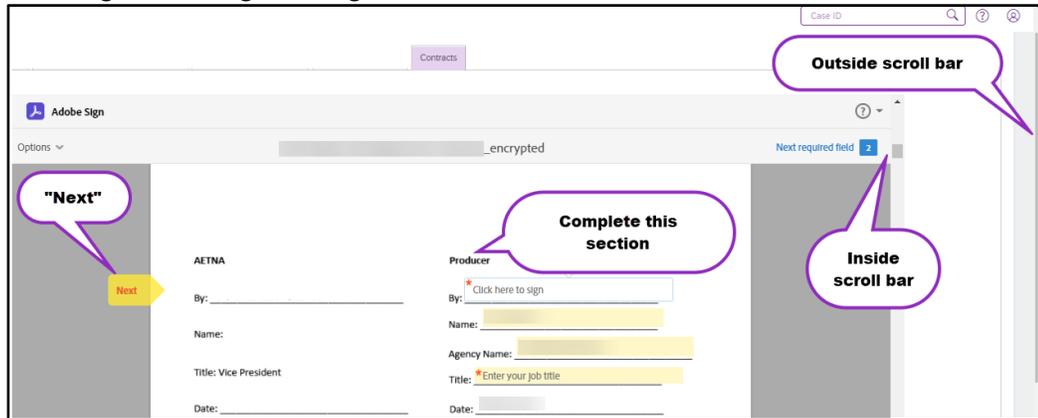
A screenshot of the 'Banking Information' tab. At the top, it says 'Banking Information'. Below that is a purple bar with the text 'Acknowledge below that you are aware of the impact on all business lines with this change.' A checkbox is checked with the text 'Bank information changes submitted via this form apply to all Aetna lines of business'. A callout bubble says 'Acknowledgement' pointing to the checkbox. Below the checkbox are input fields for 'Bank Account Type *', 'Bank Routing Number *', and 'Bank Account *'. A callout bubble says 'Input banking information' pointing to these fields. Below these fields is a 'Validate Routing Number' button. A callout bubble says 'Click to validate and populate bank information below' pointing to this button. Below the button are input fields for 'Bank Name', 'Bank Address Line 1', 'Bank Address Line 2', 'Bank City', 'Bank State', and 'Bank Zip Code'.

Contracts tab

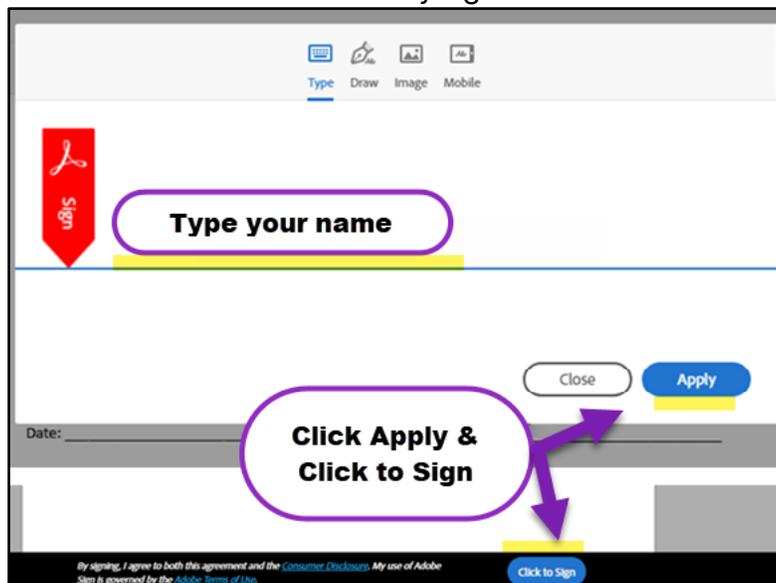
1. Click the "Start" electronic sticky tab to begin.



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.

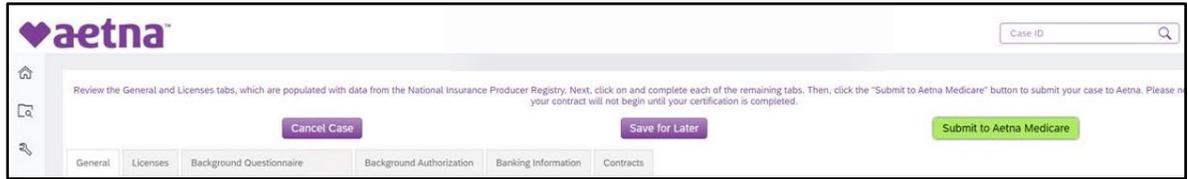


Principal Changes tab (if required)

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.](#)

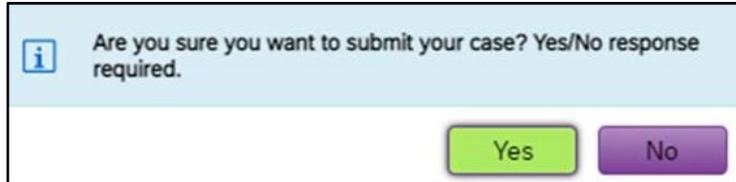
Submitting your case

1. Click **“Submit to Aetna Medicare.”**



The screenshot shows the Aetna web interface for submitting a case. At the top left is the Aetna logo. In the top right corner, there is a search box labeled "Case ID". Below the header, a navigation bar contains several tabs: "General", "Licenses", "Background Questionnaire", "Background Authorization", "Banking Information", and "Contracts". The "Licenses" tab is currently selected. In the main content area, there is a message: "Review the General and Licenses tabs, which are populated with data from the National Insurance Producer Registry. Next, click on and complete each of the remaining tabs. Then, click the 'Submit to Aetna Medicare' button to submit your case to Aetna. Please note that your contract will not begin until your certification is completed." Below this message are three buttons: "Cancel Case" (purple), "Save for Later" (purple), and "Submit to Aetna Medicare" (green).

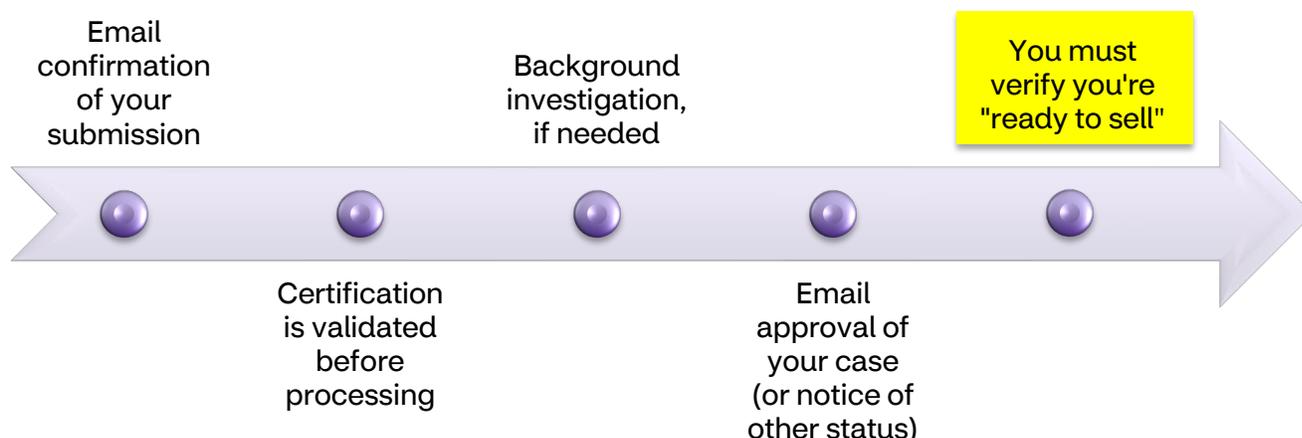
2. Click **“Yes”** to confirm.



The screenshot shows a confirmation dialog box with a light blue header. On the left is an information icon (a lowercase 'i' in a square). The text in the header reads: "Are you sure you want to submit your case? Yes/No response required." Below the header, there are two buttons: "Yes" (green) and "No" (purple).

Important next steps

What happens after you submit your case?



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:

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

Understanding case statuses



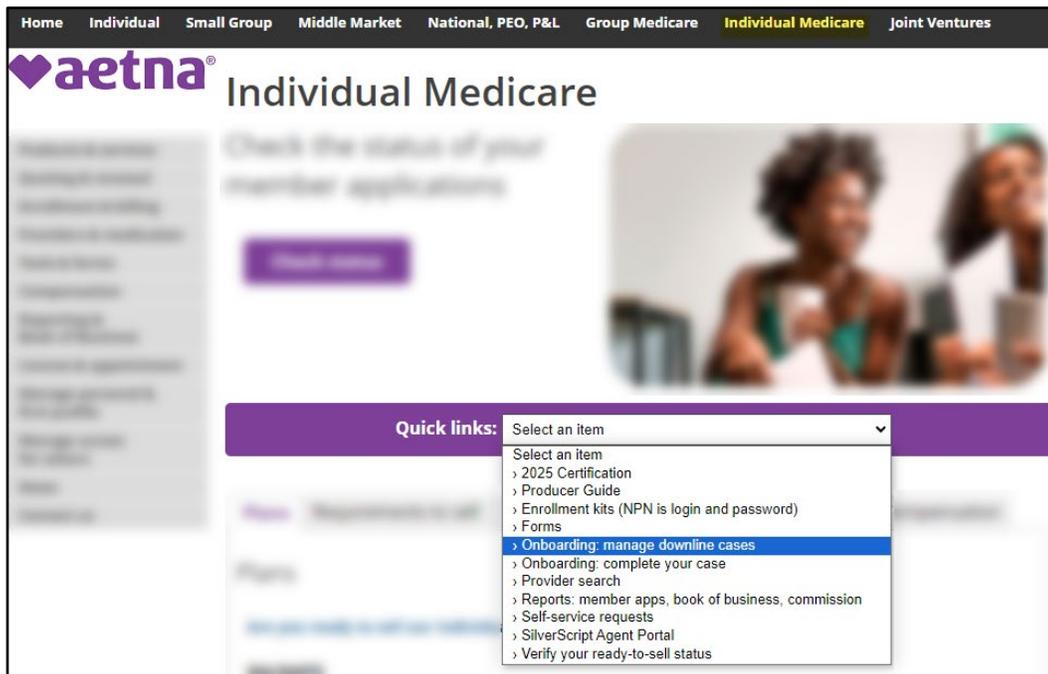
Agent action or awaiting validation		
Producer World Processing		The agent must click the link to activate their case. Then they'll register and/or log in to Producer World and, if applicable, complete a W-9 before transferring to the onboarding system.
Producer Application		The agent must complete their 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

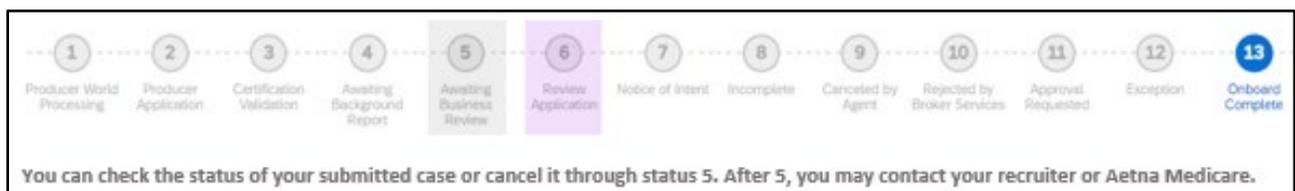
How to check the status of a submitted case

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.

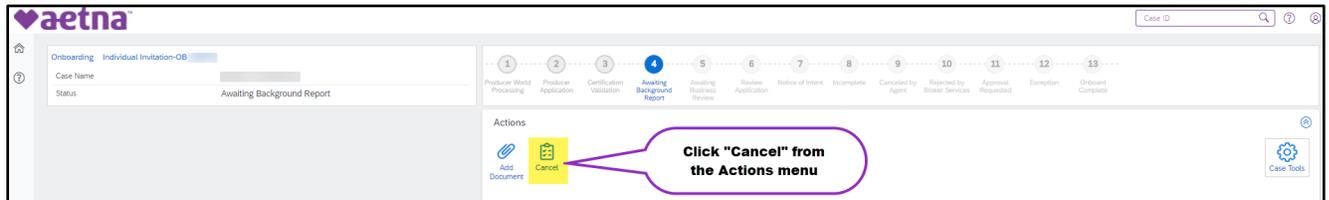


How to cancel a submitted case

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 ...



Return to your onboarding invitation and follow the link

**Contact your recruiter if you need it resent*

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

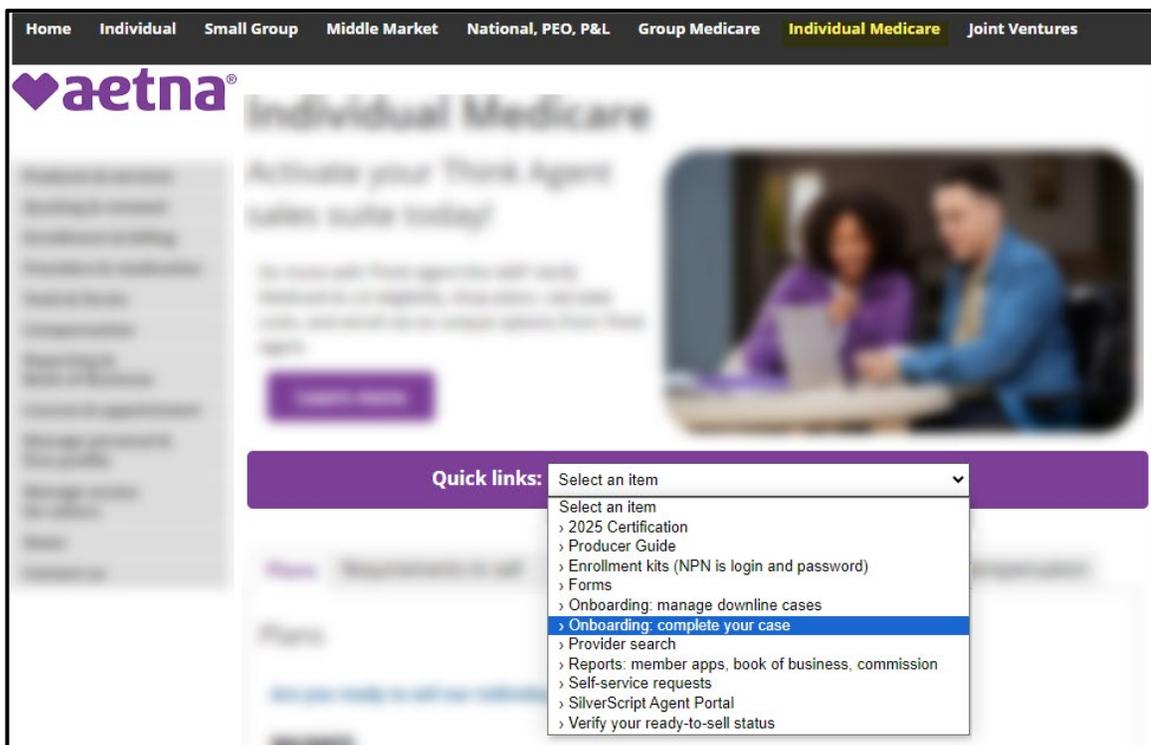


Log in to Producer World and use Quick Links to complete your case

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.

The screenshot shows the Aetna Medicare Contract Maintenance interface. At the top, there is a navigation bar with links: Home, Student Health, Small Group, Middle Market, National Accounts, Group Medicare, Individual Medicare, and Joint Ventures. Below the navigation bar is the Aetna logo and the title "Medicare Contract Maintenance". On the left side, there is a sidebar menu with options: Products, Find the right plan, Quote / Renewal, Enrollment, Forms, Tools & apps, Compensation, and Book of business. The main content area displays a case key "OB-" and a status "INPROCESS". Below this is a table with columns "Stage", "Progress", and "Date". The table contains two rows of data. At the bottom of the table, there is a yellow button labeled "Cancel Application".

Otherwise, select your active case.

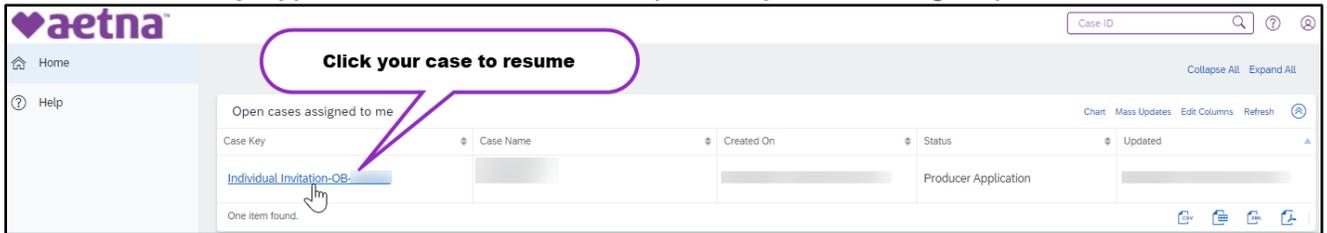
The screenshot shows the Aetna Medicare Contract Maintenance interface. At the top, there is a navigation bar with links: Home, Student Health, Small Group, Middle Market, National, PEO, P&L, Group Medicare, Individual Medicare, and Joint Ventures. Below the navigation bar is the Aetna logo and the title "Medicare Contract Maintenance". Below the title, there are fields for "Recruiter Name" and "Position". Below these fields, there is a case key "OB-" and a status "INPROCESS". Below this is a table with columns "Stage", "Progress", and "Date". The table contains five rows of data. At the bottom of the table, there is a yellow button labeled "Continue". A purple callout bubble points to the "Continue" button with the text "Click 'Continue' to resume your case".

Click "Continue" to move to the onboarding system.

The screenshot shows the Aetna Medicare Contract Maintenance interface. At the top, there is the Aetna logo. Below the logo, there is a purple bar. Below the bar, there is a text box with the text "Please follow the link below to complete your case." Below the text box, there is a purple button labeled "Continue". A purple callout bubble points to the "Continue" button with the text "Click 'Continue' to access the onboarding system".

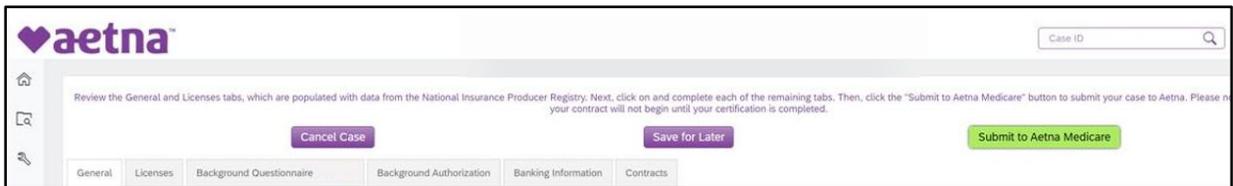
How to resume an unsubmitted case

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

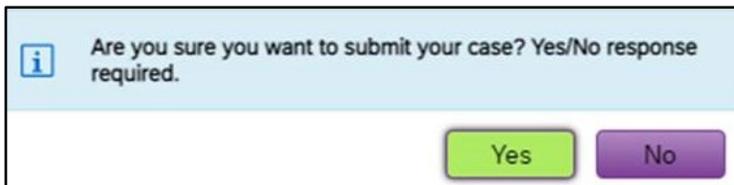


How to submit your case

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. You can manage your agency's information or designate that role to someone else.

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 invite others to onboard 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.