aetna™
medicare solutions

Onboarding Guide

FOR NEW AGENTS

Version 06.01.2022*

**Be sure to reference Producer World the most current version.*

How to contact us

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

Table of Contents

Introduction to onboarding

Contact your recruiter

Your recruiter will generate an onboarding invitation email containing a link to get started.

Complete online forms

You'll complete online forms in our onboarding system and submit your case to us.

We'll process your case

We'll process your case after validating you've met the certification requirements.

Know before you go

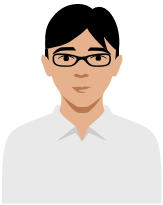
The link in your onboarding invitation will **expire after sixty (60) days**. After that time, you'll need to contact your recruiter for a new invitation.

You may have **only one active case**. If you've engaged another invitation, you'll need to cancel it before you can advance a new one.

We recommend using the **Google Chrome** web browser for onboarding.

Onboarding options

You may onboard as an individual or you can contract an agency



Individual contracting

A producer pays to his or her own Social Security Number

If you wish to onboard as an individual, simply answer "No" when asked if you're contracting as the principal of an agency during onboarding.

Contracting an agency

A principal of an agency pays to a Tax Identification Number

If you wish to pay to your TIN, answer "Yes" when asked if you're contracting as the principal of an agency during onboarding.

Refer to our "Contracting an Agency" onboarding guide for more details. Your recruiter may download it for you or contact Aetna Medicare Broker Services at brokersupport@aetna.com or (866) 714-9301.

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

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 get started.**

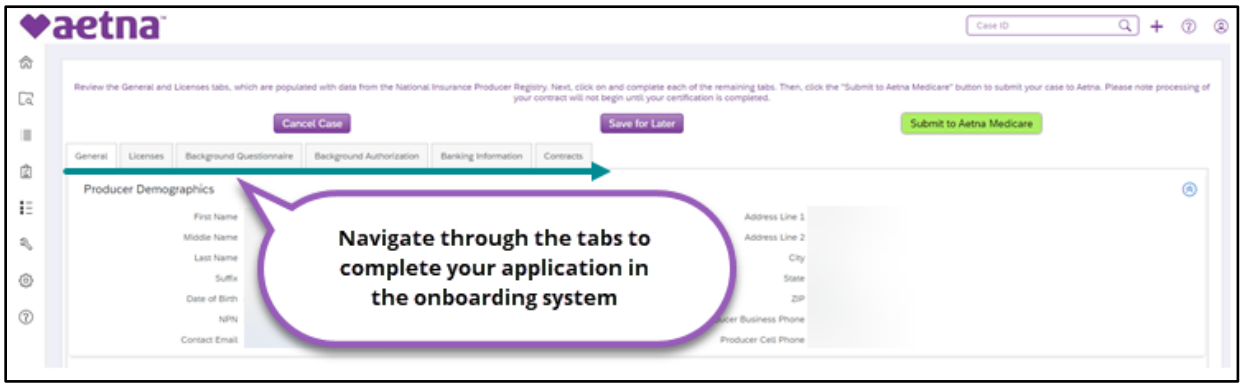
2. Indicate if you already have an Aetna Producer World account.
   - If yes, log in with your existing credentials
   - If no, you'll be guided through registration and log in

3. If we require you to submit a W-9, you'll be presented with a form to complete.

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.

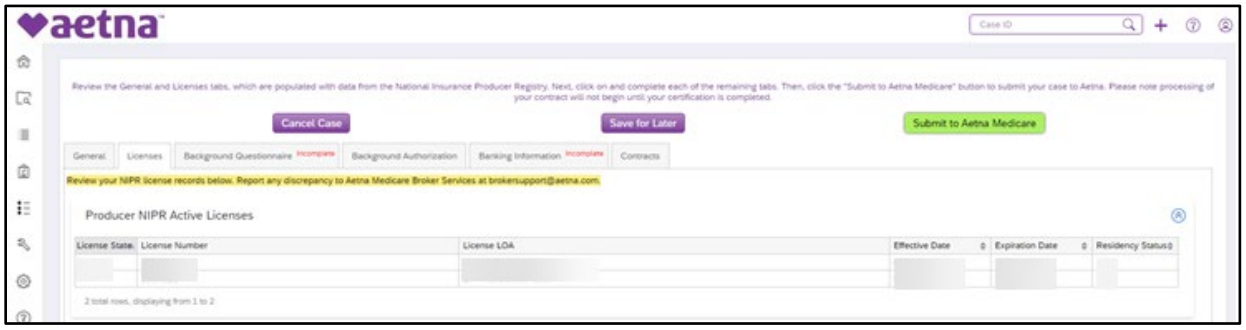


General tab

This tab is populated with your demographic records from NIPR. You can update your demographics via Producer World after you submit your onboarding case.

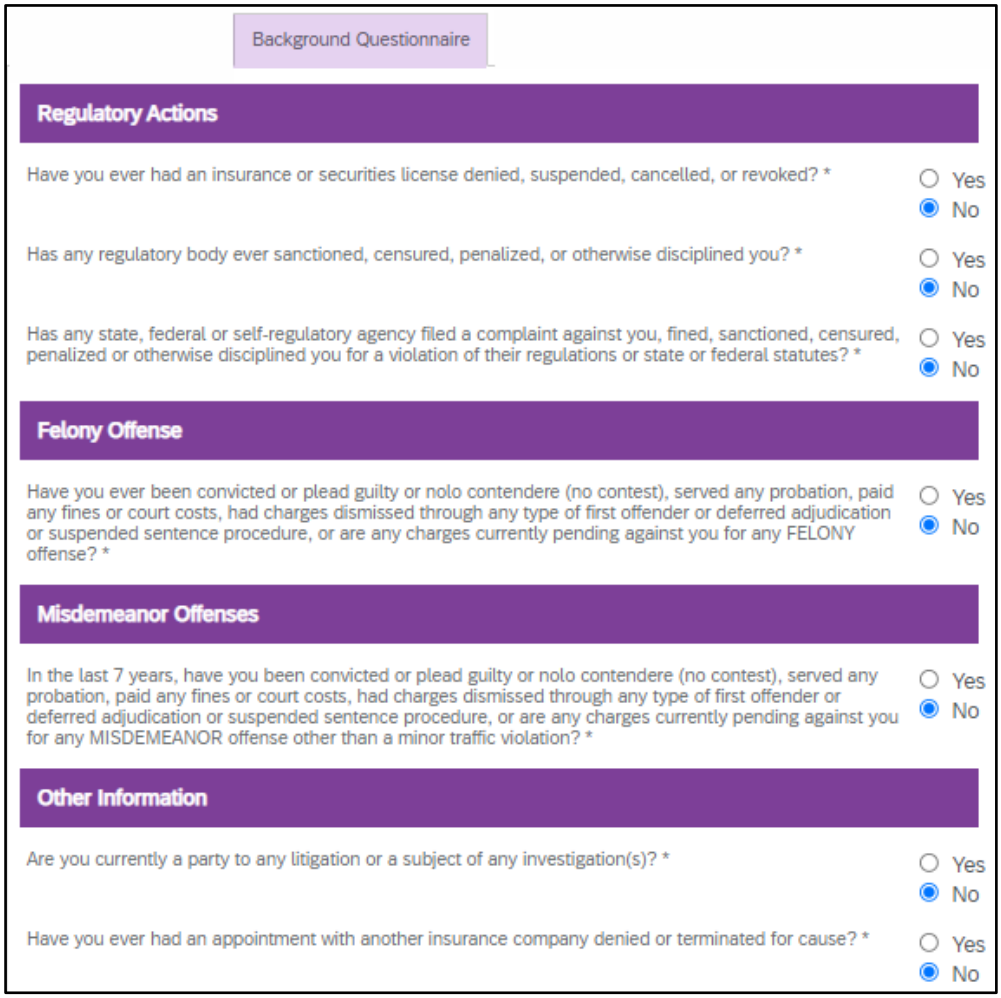
Licenses tab

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



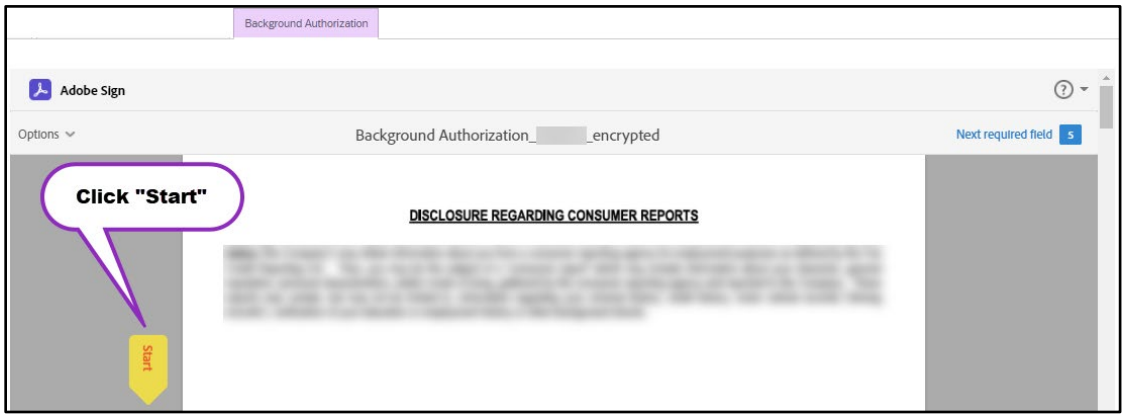
Background Questionnaire tab

Answer all the required questions and then go to the Background Authorization tab.



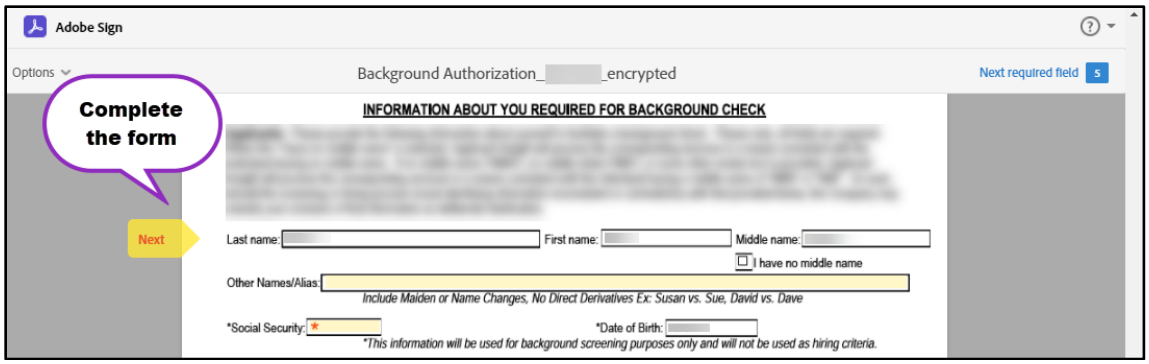
Background Authorization tab

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

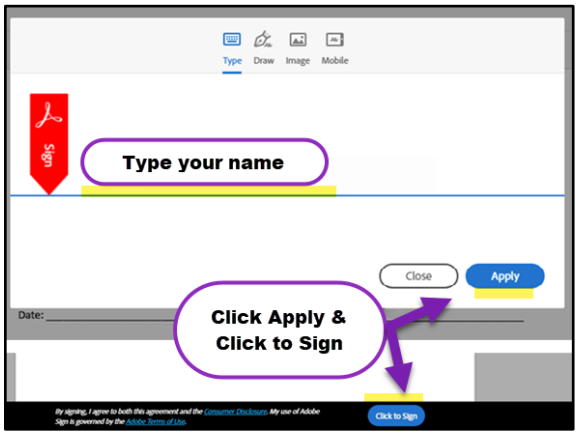


2. Click “Next” to review the credit report option. You can use the inside scroll bar to navigate through the material presented.

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

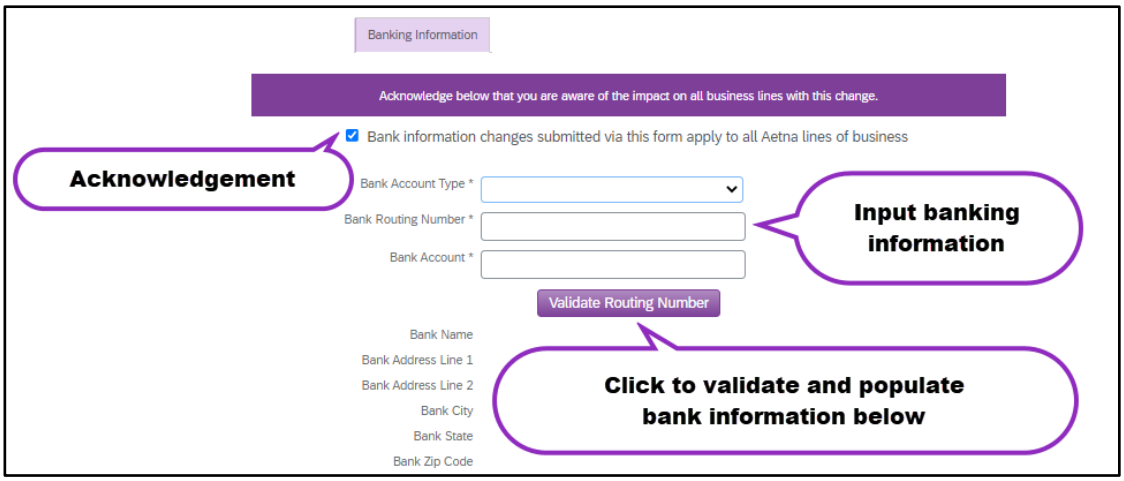


4. After you’ve completed the form, **scroll to the bottom** to electronically sign it.



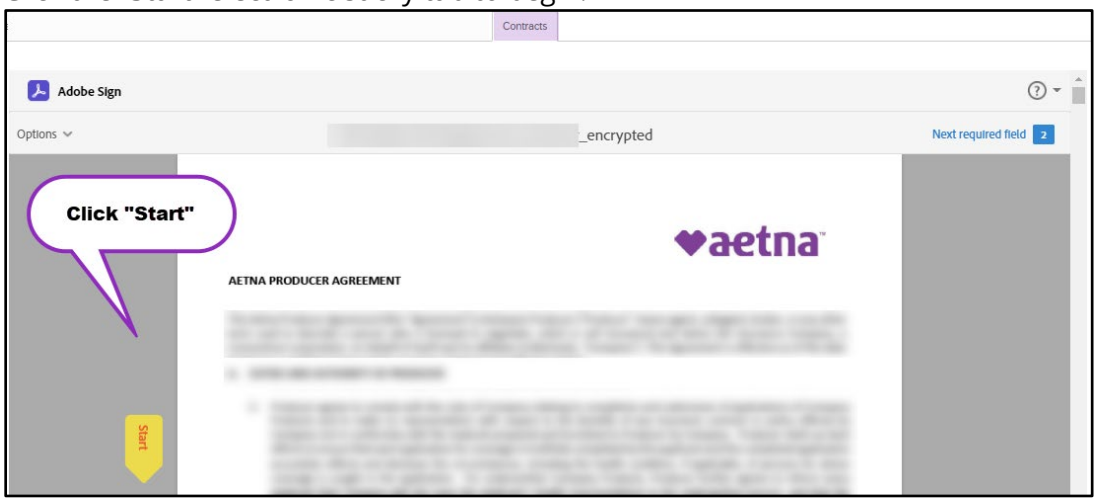
Banking Information tab

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

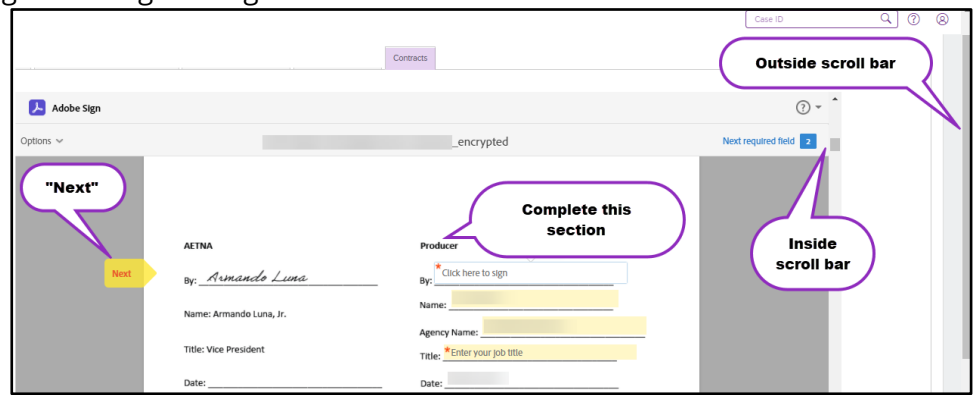


Contracts tab

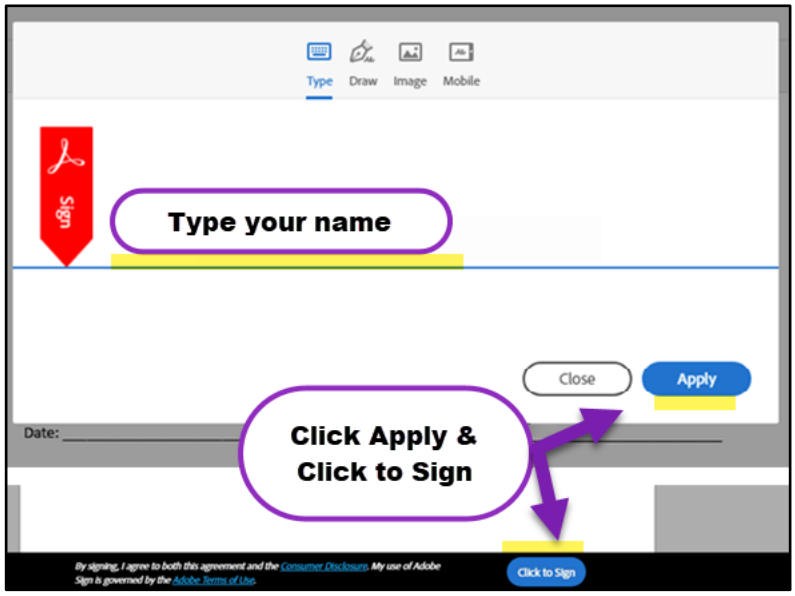
1. Click the "Start" electronic sticky tab to begin.



2. Click "Next" to jump to the signature form and complete it. You can use the inside scroll bar to navigate through the agreement.

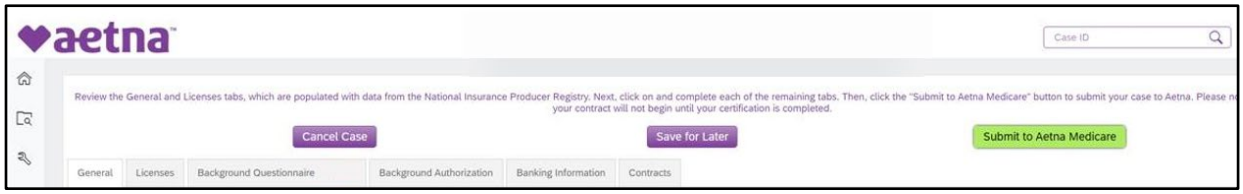


3. After you've completed the form, **scroll to the bottom** to electronically sign it.

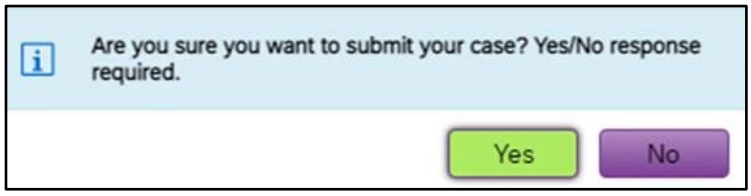


Submitting your case

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

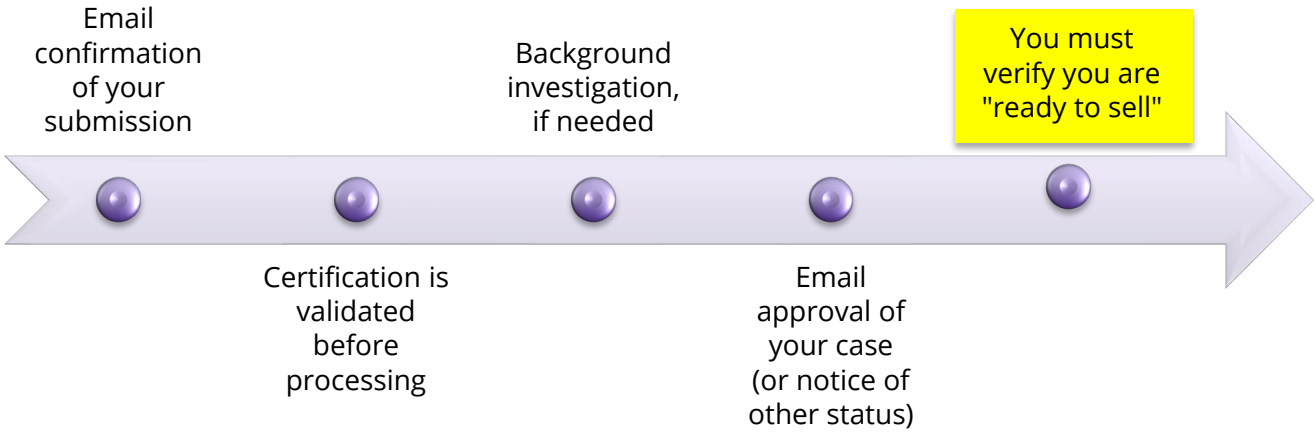


2. Then click "**Yes**" to confirm.



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 with us that you're "ready to sell" (RTS).

3-ways to verify your RTS status:

- Log in to Producer World and visit the Individual Medicare page
- By contacting your recruiter
- By contacting Aetna Medicare Broker Services at 1-866-714-9301 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 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 notices from our onboarding system are sent from donotreply@contracting.aetna.com to the email associated with your case. Copies of the notices are sent to the recruiter associate with the case. Below are some of the email notifications you may receive, depending upon your scenario:

Invitation

Sent weekly until case is activated

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 (from brokersupport@aetna.com)

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.

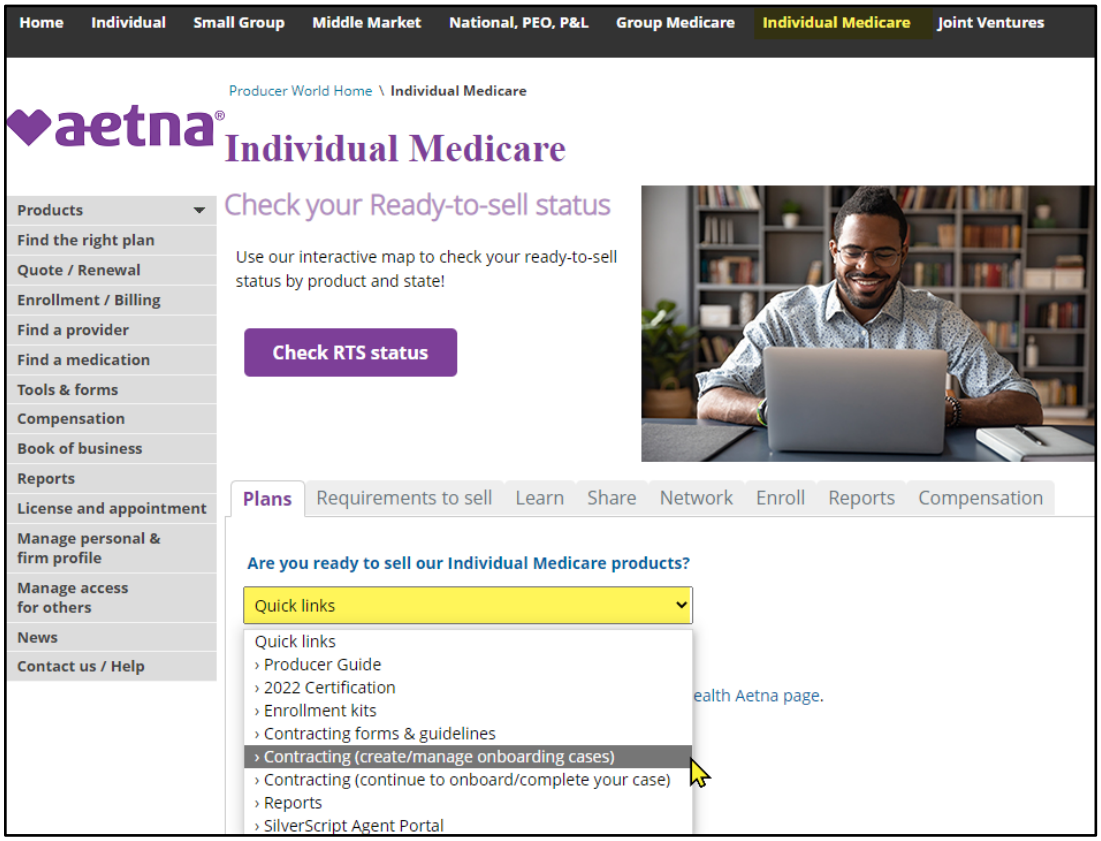
Agent action or awaiting validation		
Producer World Processing		The agent must click the link to activate their case. Then they'll register and/or log in to Producer World and, if applicable, complete a W-9 before transferring to the onboarding system.
Producer Application		The agent must complete their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

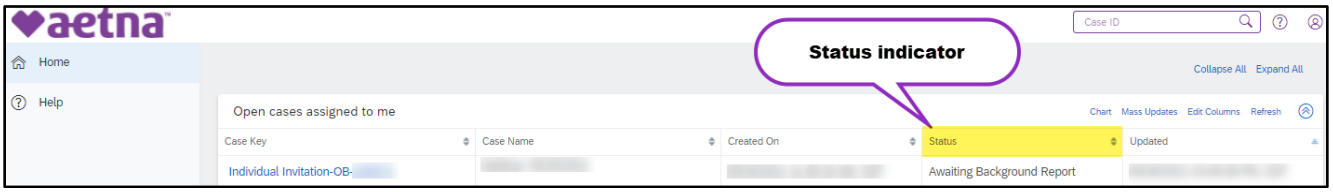
How to check the status of a submitted case

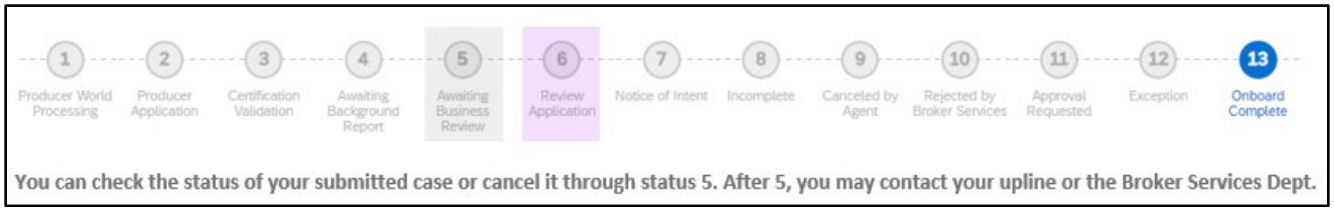
Log in to Producer World and navigate to the onboarding system

1. Log in to Producer World
2. From the top menu bar, go to Individual Medicare
3. From the quick links menu, select **"Contracting (create/manage onboarding cases)"**



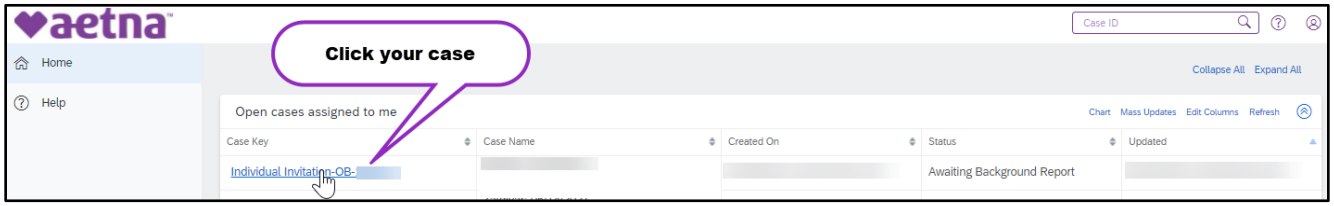
From the Home page of the onboarding system, locate your case and note the status



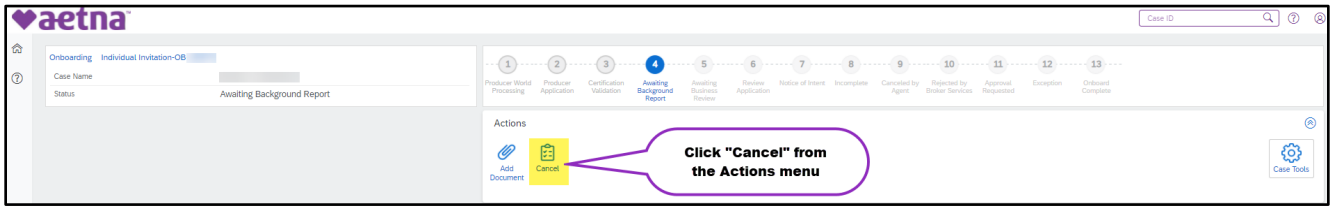


How to cancel a submitted case

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



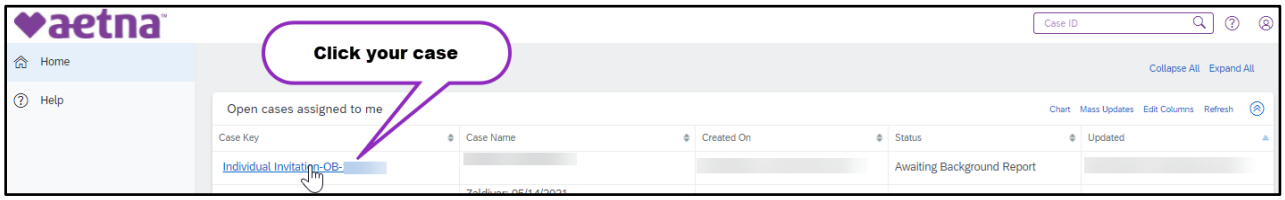
Click "Cancel" from the Actions menu



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

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

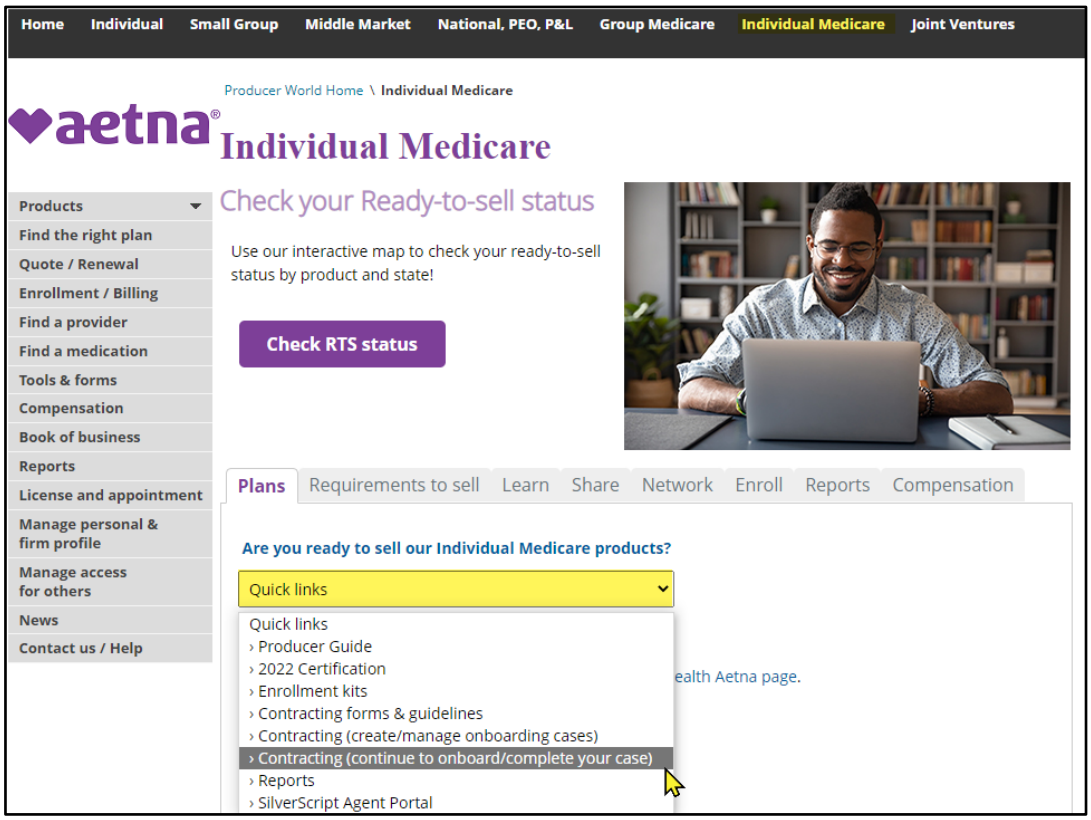
**Contact your upline or the BSD if you need it resent*

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

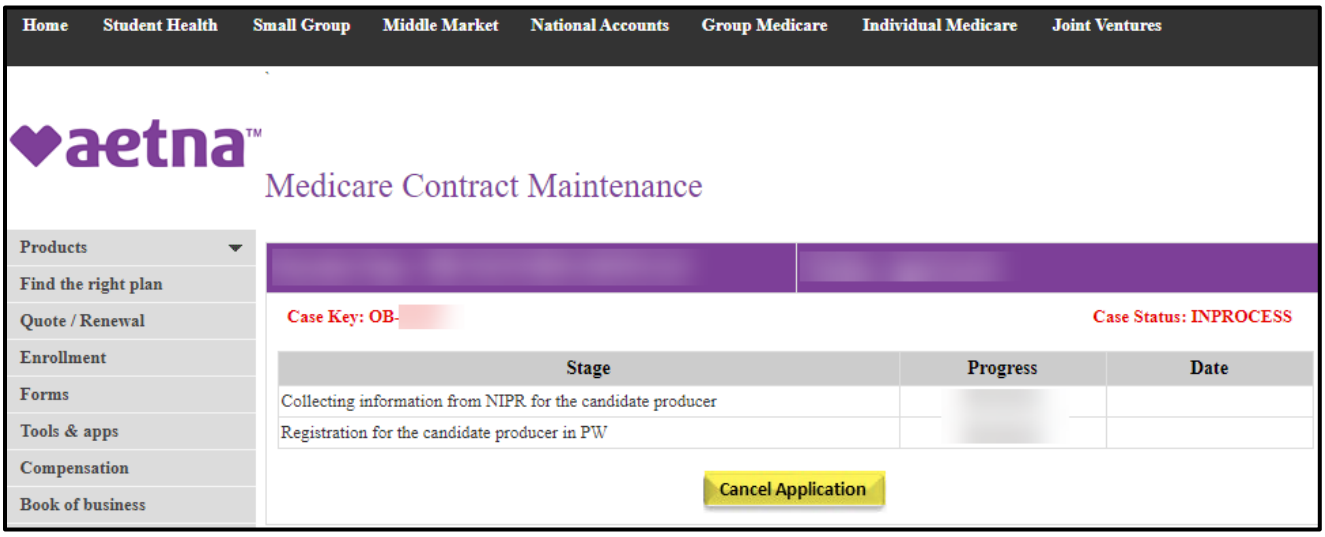
Log in to Producer World and continue to onboard

How to return to an unsubmitted case

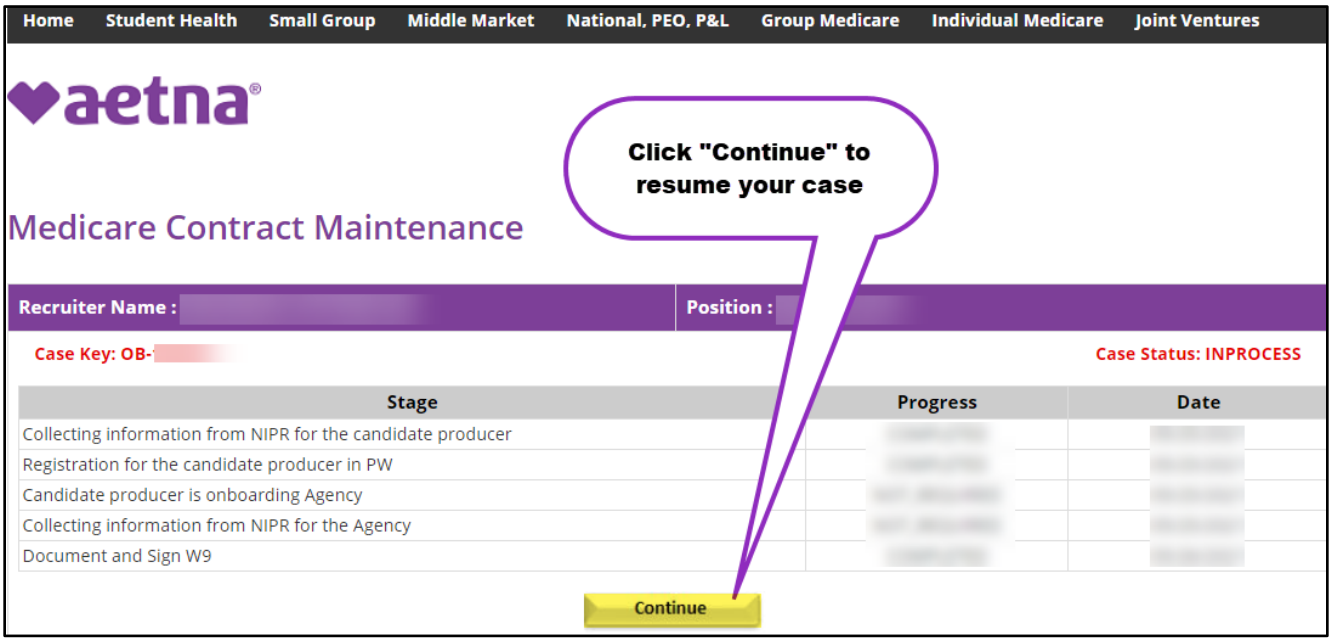
1. Log in to Producer World
2. From the top menu bar, go to Individual Medicare
3. From the quick links menu, select **"Contracting (continue to onboard/complete your case)**



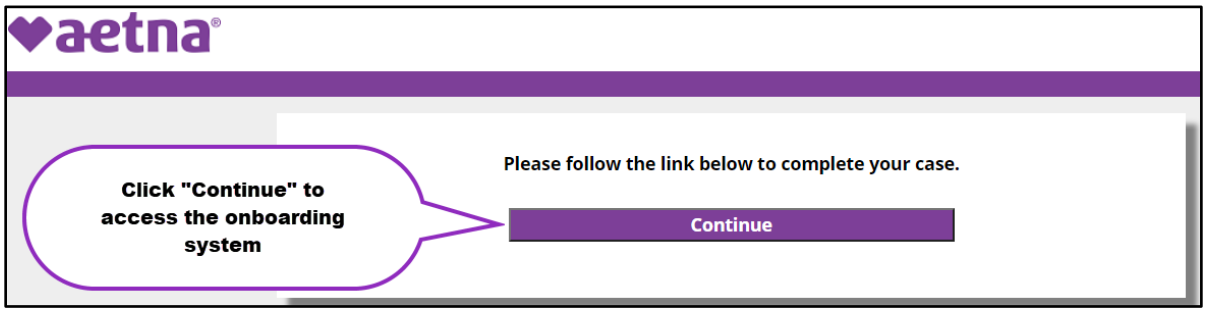
If you have multiple cases, you may cancel one from the Medicare Contract Maintenance page



Otherwise, select your active case from the Medicare Contract Maintenance page

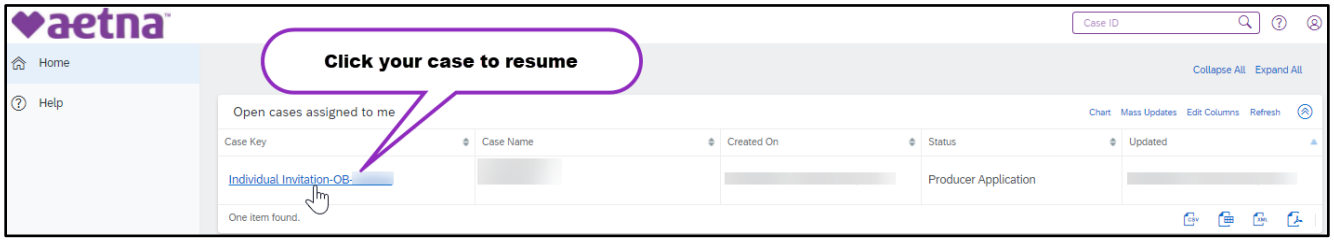


Continue to the onboarding system



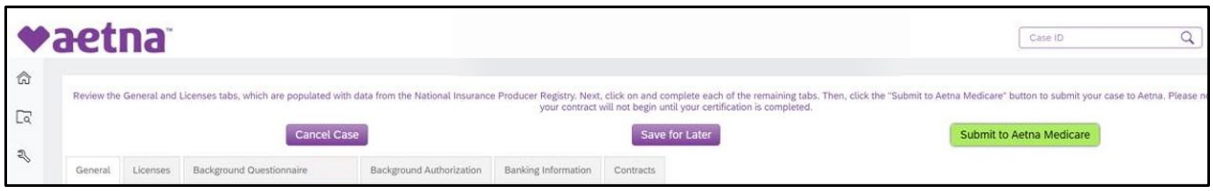
How to resume an unsubmitted case

Resume your case to complete any remaining information and submit your case to Aetna

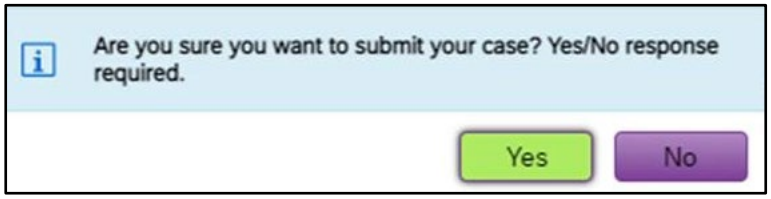


How to submit your case

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



2. Then click "**Yes**" to confirm.



Help

The “Receiving an error code? Here’s what to do!” guide explains error messages that you may encounter during onboarding. Log in to Producer World and visit the Individual Medicare page. Open the “Quick links” and select “Contracting forms and guidelines.” Or your recruiter may download a copy for you.

How to contact us

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