



# 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](mailto:brokersupport@aetna.com).

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# Introduction to onboarding

## Contact your recruiter

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

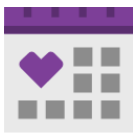
## Complete online forms

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.



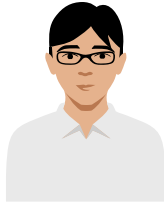
You may have **only one active case**. If you've engaged another invitation, you'll need to cancel it before you can advance a new one.



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](mailto: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



Welcome!  
Do you have a Producer World account?

Yes No

**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.

A screenshot of the Aetna onboarding system interface. The top navigation bar includes the Aetna logo, a search bar, and a 'Case ID' field. Below the navigation bar, there are several tabs: 'General', 'Licenses', 'Background Questionnaire', 'Background Authorization', 'Banking Information', and 'Contracts'. The 'General' tab is currently selected. A callout box with a purple border and a speech bubble icon contains the text: 'Navigate through the tabs to complete your application in the onboarding system'. The main content area shows a form for 'Producer Demographics' with fields for First Name, Middle Name, Last Name, Suffix, Date of Birth, NPN, Contact Email, Address Line 1, Address Line 2, City, State, ZIP, Producer Business Phone, and Producer Cell Phone. There are also buttons for 'Cancel Case', 'Save for Later', and 'Submit to Aetna Medicare'.

## 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](mailto:brokersupport@aetna.com).

A screenshot of the Aetna onboarding system interface, specifically the 'Licenses' tab. The top navigation bar is the same as the previous screenshot. The 'Licenses' tab is selected, and the 'Background Questionnaire' and 'Banking Information' tabs are marked as 'Incomplete'. The main content area shows a table titled 'Producer NIPR Active Licenses'. The table has columns for License State, License Number, License LDA, Effective Date, Expiration Date, and Residency Status. There are two rows of data, both of which are partially obscured by a greyed-out area. Below the table, it says '2 total rows, displaying from 1 to 2'. There are also buttons for 'Cancel Case', 'Save for Later', and 'Submit to Aetna Medicare'.

## Background Questionnaire tab

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

The screenshot shows the 'Background Questionnaire' tab. It contains four sections, each with a purple header bar:

- 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.

The screenshot shows the 'Background Authorization' tab. At the top, it says 'Background Authorization' and 'Background Authorization\_...\_encrypted'. Below this, there is a 'DISCLOSURE REGARDING CONSUMER REPORTS' section. A yellow sticky tab labeled 'Start' is visible on the left side. A callout bubble points to the 'Start' tab with the text 'Click "Start"'. On the right side, there is a 'Next required field' button with a blue '5'.

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

Case ID [search icon] [help icon] [share icon]

Adobe Sign [help icon]

Options ▾ Background Authorization\_...\_encrypted Next required field 5

**NOTICE REGARDING CONSUMER CREDIT REPORT PURSUANT TO CALIFORNIA LAW**

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:

☒ 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. ☐

**"Next"**

Next

**Outside scroll bar**

**Inside scroll bar**

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

Adobe Sign [help icon]

Options ▾ Background Authorization\_...\_encrypted Next required field 5

**INFORMATION ABOUT YOU REQUIRED FOR BACKGROUND CHECK**

Last name: [text input] First name: [text input] Middle name: [text input]

☐ I have no middle name

Other Names/Alias: [text input]

*Include Maiden or Name Changes, No Direct Derivatives Ex: Susan vs. Sue, David vs. Dave*

\*Social Security: [text input] \*Date of Birth: [text input]

*\*This information will be used for background screening purposes only and will not be used as hiring criteria.*

**Complete the form**

Next

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

Type Draw Image Mobile

**Type your name**

Date: [text input]

Close Apply

**Click Apply & Click to Sign**

Click to Sign

By signing, I agree to both this agreement and the [Consumer Disclosure](#). My use of Adobe Sign is governed by the [Adobe Terms of Use](#).



## Banking Information tab

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

The image shows the 'Banking Information' tab in a software interface. At the top, there is a purple bar with the text 'Acknowledge below that you are aware of the impact on all business lines with this change.' Below this, a checkbox is checked, with the text 'Bank information changes submitted via this form apply to all Aetna lines of business'. To the left of this checkbox is a callout bubble that says 'Acknowledgement'. To the right of the checkbox are three input fields: 'Bank Account Type \*' (a dropdown menu), 'Bank Routing Number \*', and 'Bank Account \*'. To the right of these fields is a callout bubble that says 'Input banking information'. Below the 'Bank Routing Number \*' field is a 'Validate Routing Number' button. Below this button is a callout bubble that says 'Click to validate and populate bank information below'. Below the button are several input fields: 'Bank Name', 'Bank Address Line 1', 'Bank Address Line 2', 'Bank City', 'Bank State', and 'Bank Zip Code'.

## Contracts tab

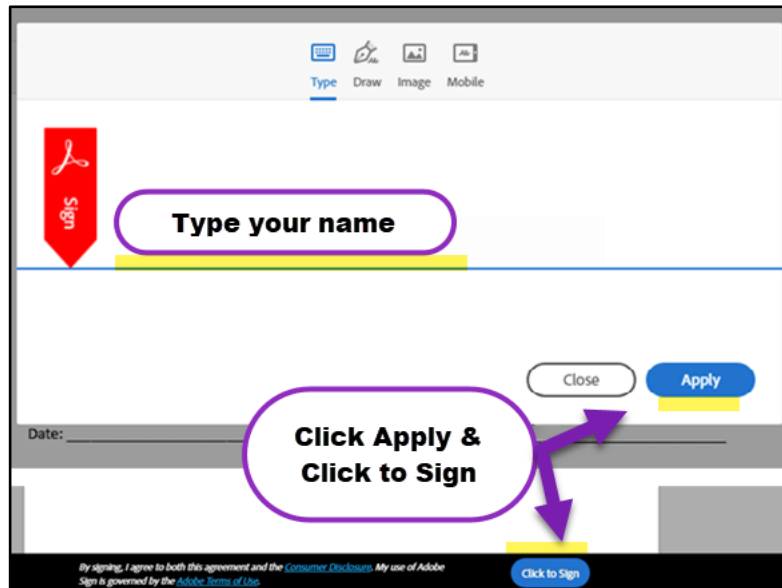
1. Click the "Start" electronic sticky tab to begin.

The image shows the 'Contracts' tab in a software interface. At the top, there is a purple bar with the text 'Contracts'. Below this, there is a header area with the Adobe Sign logo, a search bar, and a 'Next required field' indicator. The main content area is titled 'AETNA PRODUCER AGREEMENT' and features the Aetna logo. On the left side, there is a yellow 'Start' button. A callout bubble points to this button with the text 'Click "Start"'. The main content area is mostly blurred, showing some text and a signature line.

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

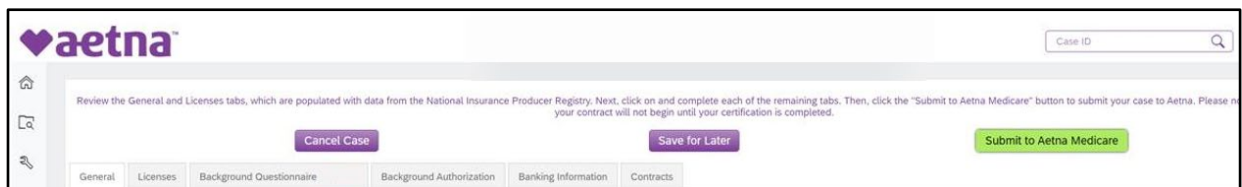
The image shows the 'Contracts' tab in a software interface, specifically the signature form. At the top, there is a purple bar with the text 'Contracts'. Below this, there is a header area with the Adobe Sign logo, a search bar, and a 'Next required field' indicator. The main content area is titled 'AETNA' and features the Aetna logo. On the left side, there is a yellow 'Next' button. A callout bubble points to this button with the text '"Next"'. The main content area is divided into two sections: 'AETNA' and 'Producer'. The 'AETNA' section contains fields for 'By: Armando Luna', 'Name: Armando Luna, Jr.', 'Title: Vice President', and 'Date:'. The 'Producer' section contains fields for 'By: Click here to sign', 'Name:', 'Agency Name:', 'Title: Enter your job title', and 'Date:'. A callout bubble points to the 'By:' field in the 'Producer' section with the text 'Complete this section'. On the right side, there is a vertical scroll bar. A callout bubble points to the outside of the scroll bar with the text 'Outside scroll bar', and another callout bubble points to the inside of the scroll bar with the text 'Inside scroll bar'.

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

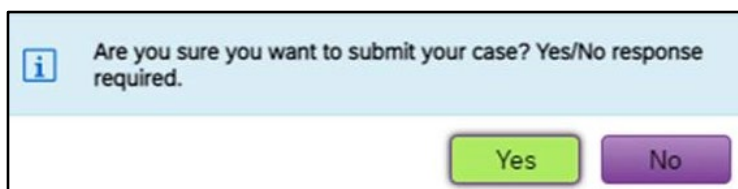


## Submitting your case

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

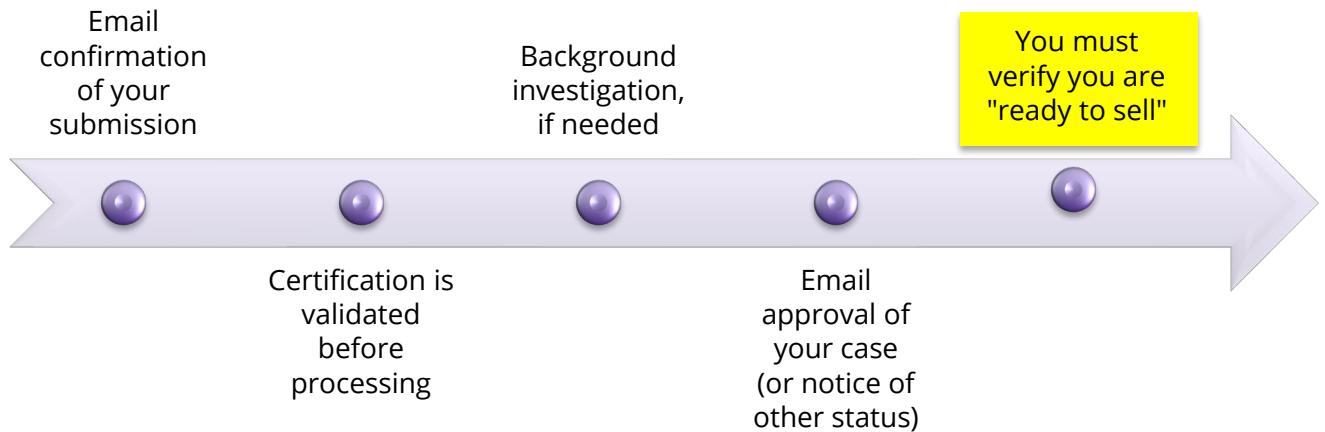


2. Then click **"Yes"** to confirm.



# 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](mailto:brokersupport@aetna.com)

### What you need to know



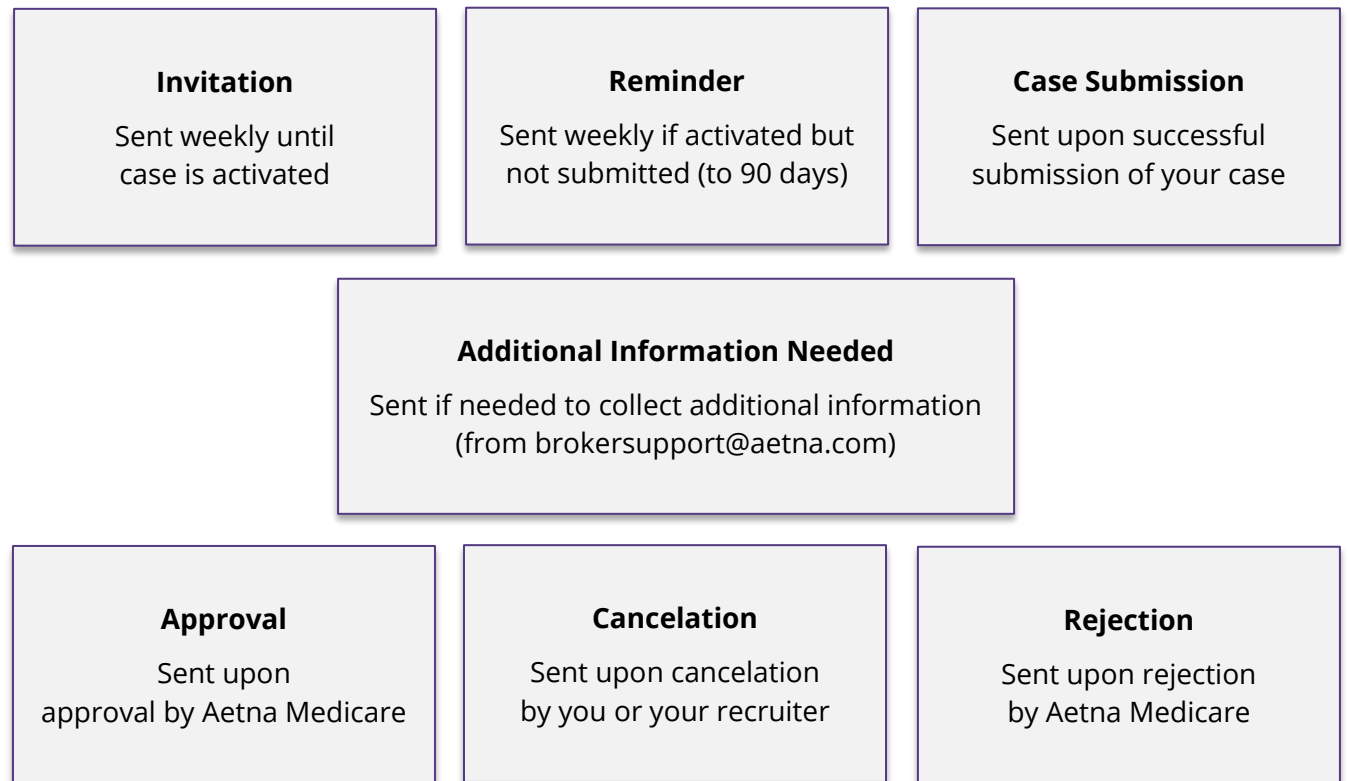
You should **actively verify** your RTS status prior to selling in each state where you conduct business. Your RTS status is subject to change based on your **continuing to meet RTS requirements** as outlined on [Producer World](#).



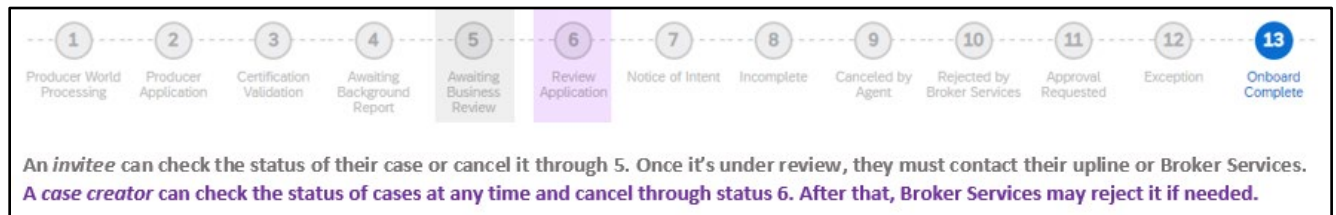
If, at any point, you fail meet any licensing requirement, including a lapse, expiration, suspension, revocation, termination, or any other action taken by the Department of Insurance (DOI) or other entity, you must stop all selling activities and notify Aetna immediately.

# Email notifications

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



# Understanding case statuses



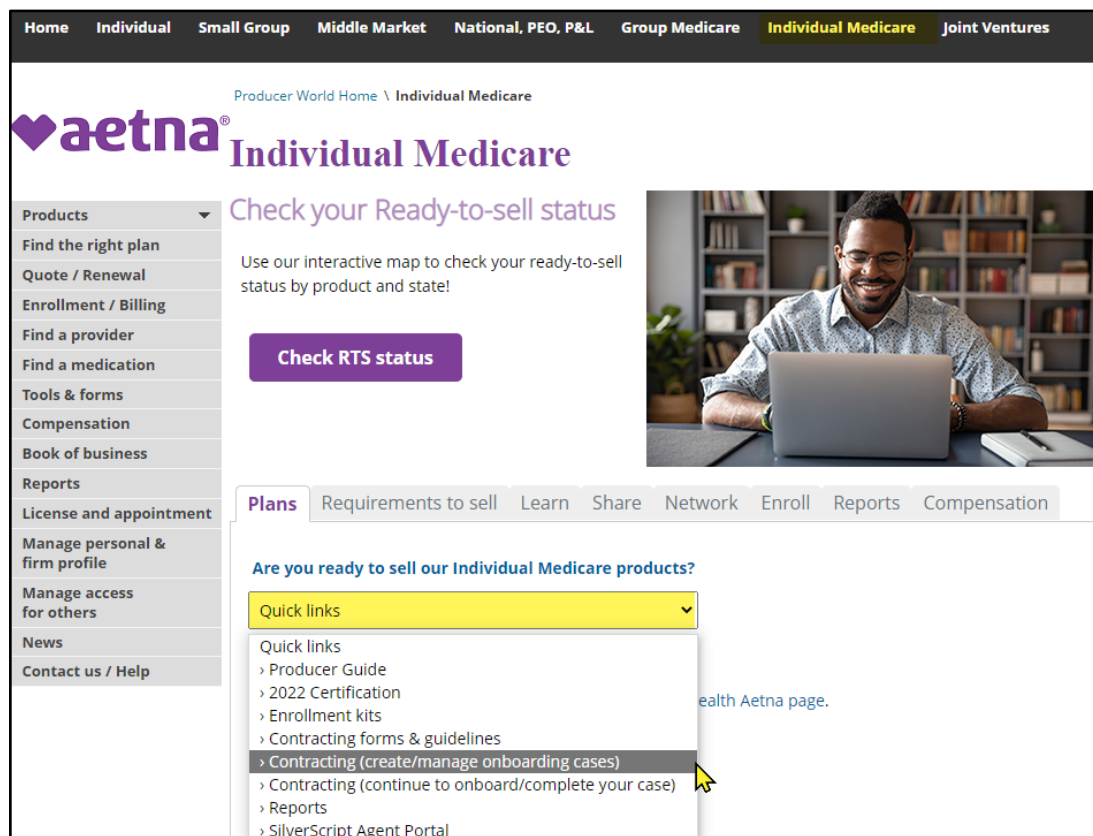
Agent action or awaiting validation		
Producer World Processing		The agent must click the link to activate their case. Then they'll register and/or log in to Producer World and, if applicable, complete a W-9 before transferring to the onboarding system.
Producer Application		The agent must complete their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

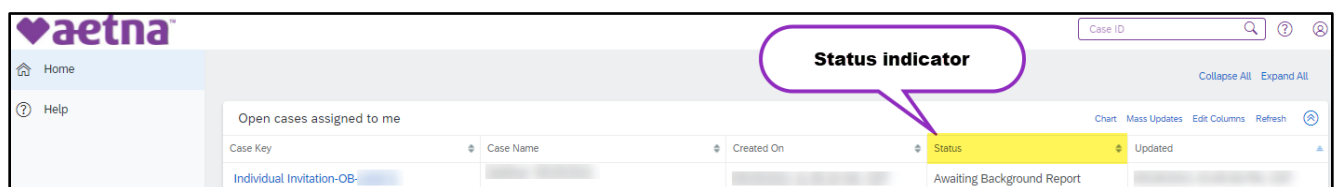
## How to check the status of a submitted case

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 **“Contracting (create/manage onboarding cases)”**



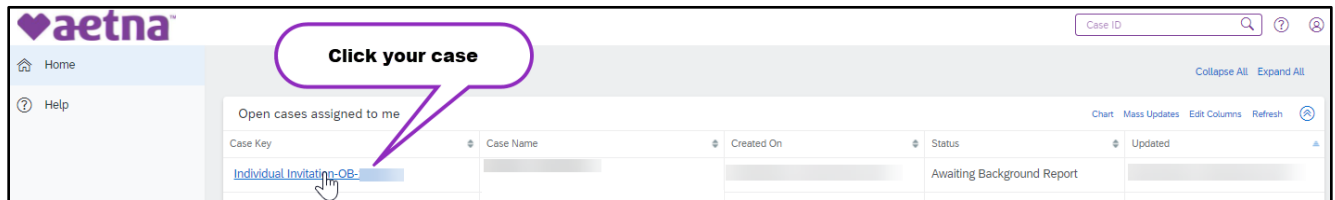
From the Home page of the onboarding system, locate your case and note the status



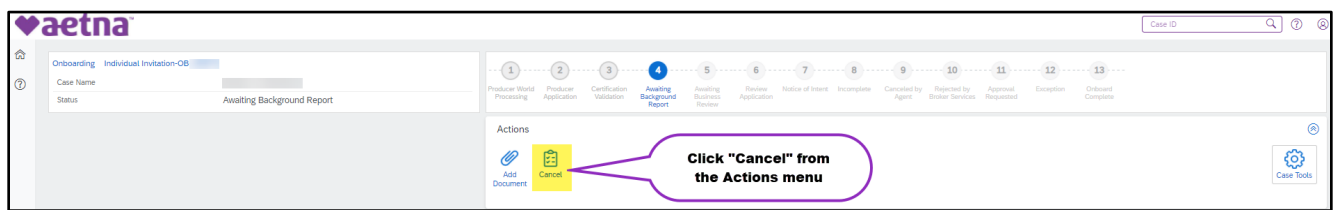


## How to cancel a submitted case

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*

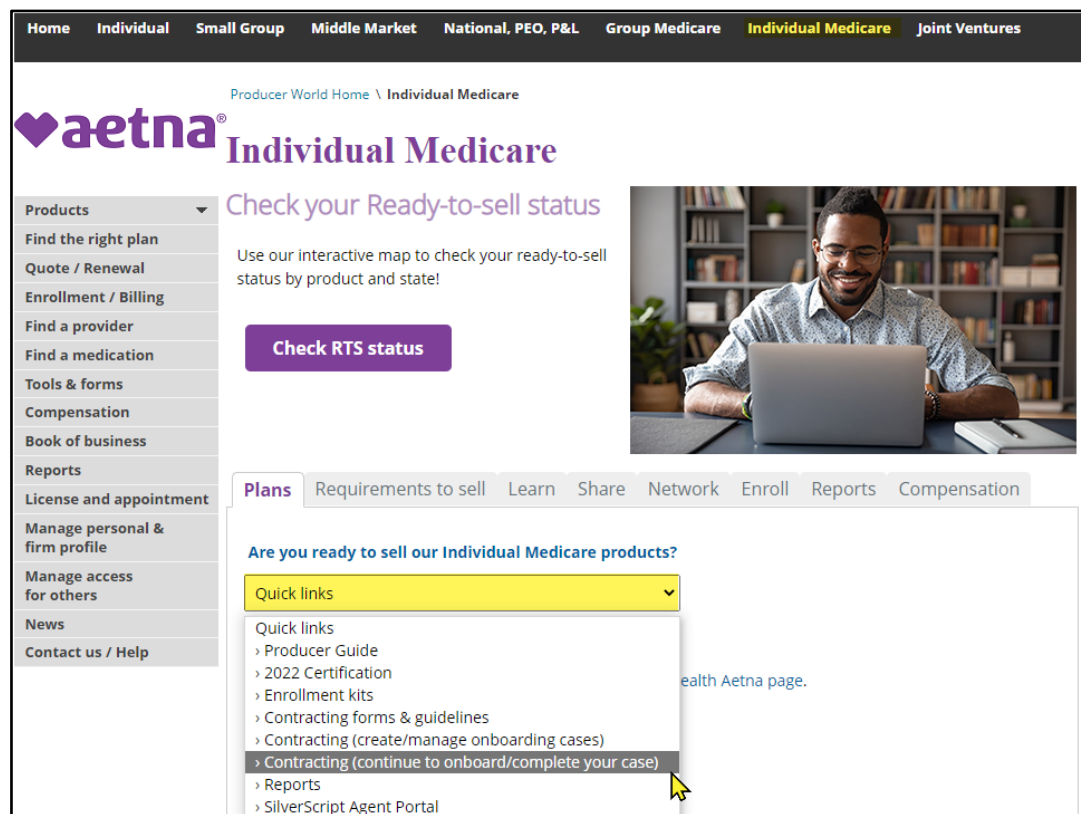
If you have activated your case  
and registered for Producer World ...



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

The screenshot shows the Medicare Contract Maintenance page. At the top 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 page title "Medicare Contract Maintenance". On the left 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 with "Case Key: OB-" and "Case Status: INPROCESS". Below this is a table with columns "Stage", "Progress", and "Date". The table contains two rows: "Collecting information from NIPR for the candidate producer" and "Registration for the candidate producer in PW". A yellow "Cancel Application" button is located at the bottom right of the table.

Stage	Progress	Date
Collecting information from NIPR for the candidate producer		
Registration for the candidate producer in PW		

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

The screenshot shows the Medicare Contract Maintenance page. At the top 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 page title "Medicare Contract Maintenance". On the left is a sidebar menu with options: Recruiter Name, Position, Case Key, and Case Status. The main content area displays a case with "Case Key: OB-" and "Case Status: INPROCESS". Below this is a table with columns "Stage", "Progress", and "Date". The table contains five rows: "Collecting information from NIPR for the candidate producer", "Registration for the candidate producer in PW", "Candidate producer is onboarding Agency", "Collecting information from NIPR for the Agency", and "Document and Sign W9". A yellow "Continue" button is located at the bottom right of the table. A callout bubble points to the "Continue" button with the text "Click 'Continue' to resume your case".

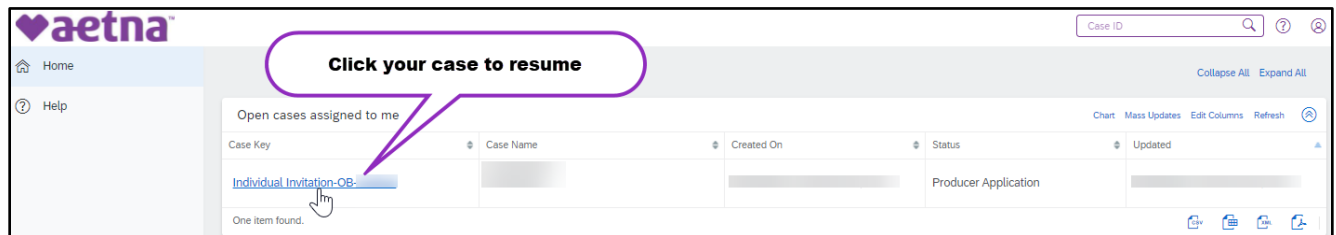
Stage	Progress	Date
Collecting information from NIPR for the candidate producer		
Registration for the candidate producer in PW		
Candidate producer is onboarding Agency		
Collecting information from NIPR for the Agency		
Document and Sign W9		

Continue to the onboarding system

The screenshot shows the onboarding system page. At the top is the Aetna logo. Below the logo is a purple bar. Below the bar is a white box with a purple border. Inside the box, there is a callout bubble pointing to a purple "Continue" button with the text "Click 'Continue' to access the onboarding system". To the right of the callout bubble is the text "Please follow the link below to complete your case."

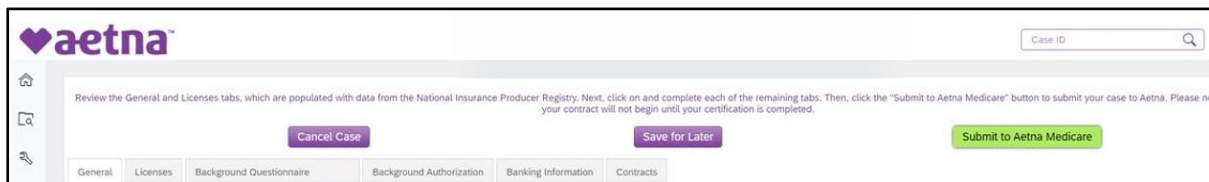
## How to resume an unsubmitted case

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

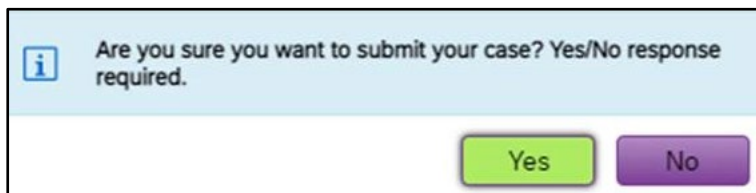


## How to submit your case

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

Contact Aetna Medicare Broker Services at (866) 714-9301, 8am–8pm Eastern time, Monday–Friday or via email [brokersupport@aetna.com](mailto:brokersupport@aetna.com). We also offer a [Contact form on Producer World](#).