

Important Notice: It is *imperative* that AHCP is listed as the General Agent of Record on each application submitted to the carrier. If AHCP is not listed as the General Agent, the writing agent will not receive *advance commissions, leads credits or annual incentive trip points*.

The following instructions have been collaborated in an effort to help all AHCP Agents Reap the Rewards for submitting business through AHCP.



New Agent Aetna Handbook



Table of Contents

** Note- To navigate to a specific set of instructions please click on the title of the section to be viewed.

Registering for Producer World	3
Creating Your Aetna Link	5
Downloading Your Embedded Link.....	8
Generate a Quote	
Part I: Add New Prospect	10
Part II: Quoting and Applying	13
Endorsing Applications	15

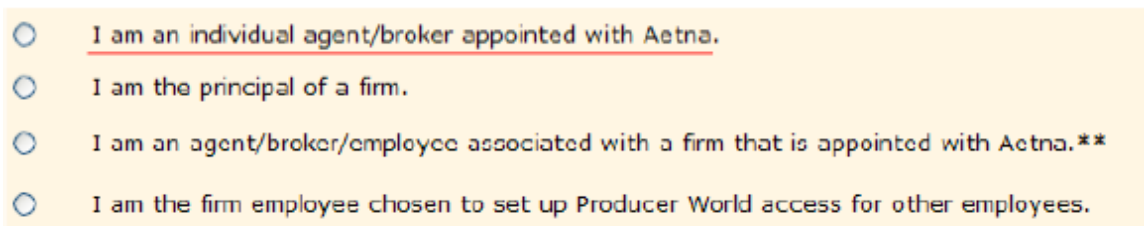
Registering for Producer World

1. Navigate to www.aetna.com
2. On the left hand side of the page under Producer Log In click [register](#)



The screenshot shows the Aetna website's 'Producers' section. The navigation bar includes 'Home', 'Individuals & Families', 'Employers & Organizations', 'Health Care Professionals', 'Producers', and 'About Us'. The main heading is 'Supporting you along the entire sales process'. On the left, there is a sidebar with links like 'Become Appointed with Aetna', 'Working with Aetna', 'Producer News', 'Producer Tools', 'Contact Aetna Sales', 'Products & Services', 'Secure Site Log In', and 'Producer Log In'. The 'Producer Log In' button is circled in red. A red box highlights the 'Register for Producer World' link in the main content area. The right sidebar contains 'Tools for Producers' with links like 'Log into Producer World®', 'Get a Quote', 'Find a Document or Form', 'Become Appointed with Aetna', and 'Contact Aetna'. At the bottom, there is a section titled 'Transforming Health Care' with the text 'Addressing today's toughest challenges Making sure all Americans get quality health care'.

3. You will then navigate to “Producer World® Registration: Select Registration Path”
4. Select “I am an individual agent/broker appointed with Aetna.” And “Continue”



The screenshot shows a list of registration options with radio buttons. The first option, "I am an individual agent/broker appointed with Aetna.", is selected and underlined in red. The other options are: "I am the principal of a firm.", "I am an agent/broker/employee associated with a firm that is appointed with Aetna.**", and "I am the firm employee chosen to set up Producer World access for other employees."

5. You will then be prompted to fill out personal information. Enter your name just as it appears on you license

#1	Social Security Number: <input type="text"/> - <input type="text"/> - <input type="text"/> OR National Producer Number (for Aetna-appointed agents only): <input type="text"/>	All fields are required Appointed Agents and Brokers: Please provide your First and Last Name as it appears on your Insurance License.
#2	Last Name: <input type="text"/>	National Producer Number search is available at: National Insurance Producer Registry
#3	First Name: <input type="text"/>	
#4	Zip Code of your primary business address: <input type="text"/>	Technical Questions?

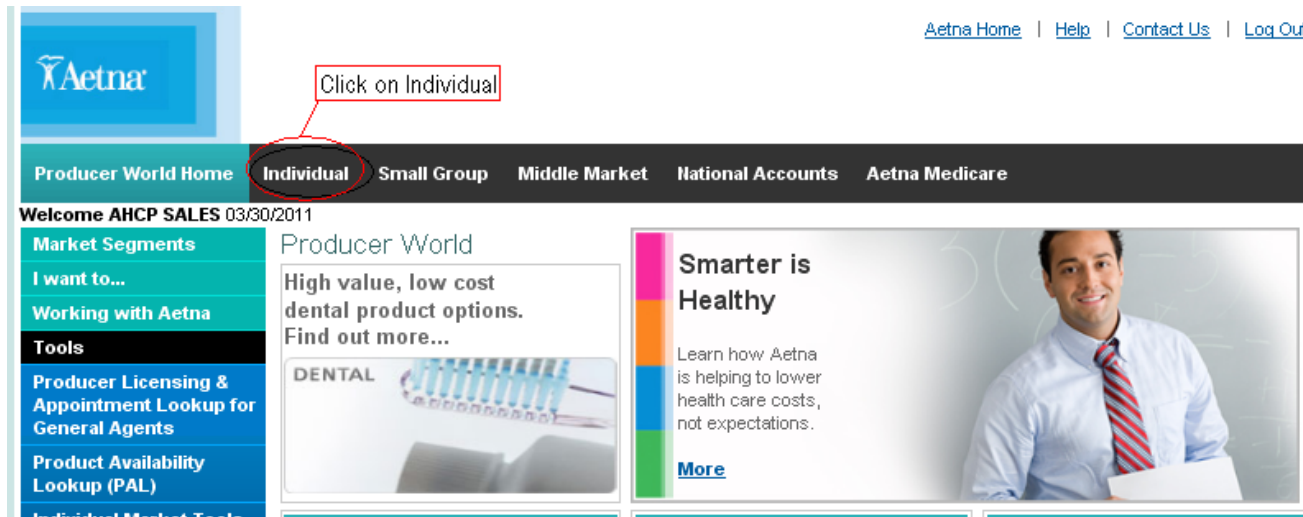
6. The next page set up user name and password
7. After the registration process is complete you will receive an email confirmation form Aetna.

Creating Your Aetna Link

1. Log in to Producer world using the username and password that you set up during the registration process



2. Select Individual at the top of the page.



3. Under “Service” header select [Learn More](#).



Producer World - Individual
Stay Out Front with your clients
 Take our virtual tour [Ready to Sell Aetna](#)
[NEW 2011 broker bonus programs](#)

PRODUCT

A range of plan options that can help strike the right balance between premium and deductible.

Product and rate information [Learn more.](#)

INFORMATION

What you need to stay current on Aetna and the industry.

Licensing & appointment and Broker Alerts [Learn more.](#)

Contact Us

• [Producer Contact Sheet](#)

DEVELOP SALES SUPPORT UNIT

SALES SUPPORT

The tools you need to help you get in front of more qualified prospects and close more business.

Marketing materials and other sales resources [Learn more.](#)

SERVICE

To serve your needs, we've redoubled our efforts

Quoting, underwriting, and commissions [Learn more.](#)

Click on the Quoting Tool

4. Choose “**Get a Quote Now**”

SERVICE

Quoting and Status Tools

“[Get a Quote Now](#)” It's fast, it's easy, it's convenient! Review all the Aetna Advantage Plans available to your clients. Aetna offers a variety of plans for individuals, families and sole proprietors. You can view the plan benefits, request a quote, receive your client's rate and create a client account as well as download the Aetna Advantage Application. If your client chooses to apply for an Aetna Advantage Plan, you will also be able to track their enrollment status online.

Click on "Get A Quote Now"

• [Get a Quote Now](#)

5. You may select any state on the next page.

6. Click **proceed** on the next page titled “*Welcome to the Aetna Individual Purchaser Solution*”

7. Afterwards select the **IPS Link Generation Tool** on the right hand side

The screenshot shows the Aetna website interface. On the left, under the heading "New Business", there is a list of actions: "Set up an account for a new client", "Run quotes for a prospect", "Search for a specific client", "Download an enrollment form", and "Email an enrollment form". On the right, a navigation menu is displayed with various options. The option "IPS Link Generation Tool" is circled in red, and a red box with the text "Select IPS Link Generation Tool" has an arrow pointing to it.

8. Complete the Personal Contact Information

9. Under General Agent Information click the **Edit GA Assignment** button

General Agent Information

General Agent : America's Health Care/ RX Add Remove

Edit GA Assignment

10. Enter TIN # **020690863** and click **Search**

Enter Search Criteria:

General Agent TIN# : [Yellow Field]

Cancel Search

11. Select **America's Health Care/RX Plan Agency Inc.** When the Agency name has been embedded the font color will change to gray.

Select Americas Health/ RX Plans, Inc

General Agent Search Results
To select a General Agent, click the agent name.

General Agent Name	City	State	Zip Code
America's Health Care/ RX Plan Agency Inc.	Irving	TX	75063

12. Click **Add** and then **Save GA Assignment**

General Agent Information

General Agent : America's Health Care/ RX Add Remove

Click Add to tie yourself to AHCP

Save GA Assignment

Then click Save GA Assignment

13. If you currently have a website that you use for business you may enter your URL in the Link Usage field

14. Agree to Terms of Usage

15. Electronically Sign and date the form. The names must be exactly the same (spaces, capitalization, etc)

16. Click **Generate Link**

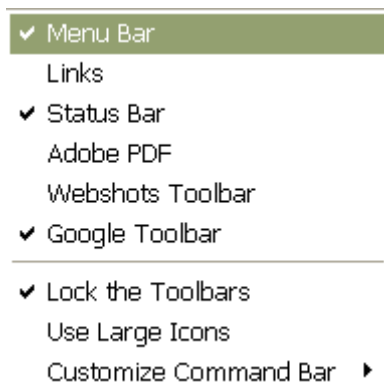
17. Once the link has been created you may copy and paste it in your replicated websites; quoting engines, etc.

Downloading Your Embedded Link (Consumer Portal)

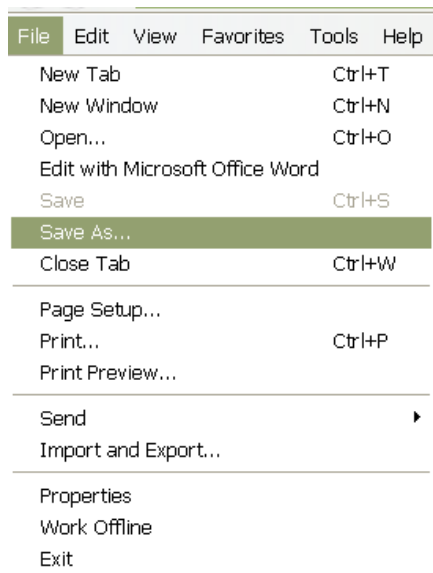
1. Select the internet explore icon **“download link”**

Download Link 

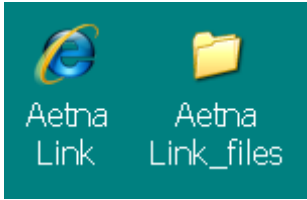
2. Select File from your Menu Toolbar. If there is no **“File”** button at the top of your screen right click at the top of the screen and check **“Menu”**



3. Choose **“Save As”** and Save to your desktop. Rename the file as **“AHCP Aetna Link”**



4. Once the file has been saved, close out of Producer World.
5. You should see two new items on your desk top.



One is a File Icon. Inside this folder is the Aetna logo that you have been provided to use under the terms that you agreed to during the set-up process. The second is an internet explore icon. This is your embedded link.

To open your embedded link, click on the internet icon and then click on the Aetna logo.

Save this file on your local computer for future use to copy and paste the logo/link in emails/website(s) by clicking menu 'File --> Save As'



Here is an example of an embedded link (Consumer Portal):



**Products for
Individuals**

[Welcome AHCP Sales](#) [Logout](#)

It's Easy... Compare Plans, Get Quotes, Apply Online!

To get started, simply enter the information below and press 'Get Quote' or 'Apply Online'.

My zip code: -

Priority Code:

Get a Quote OR Apply Online

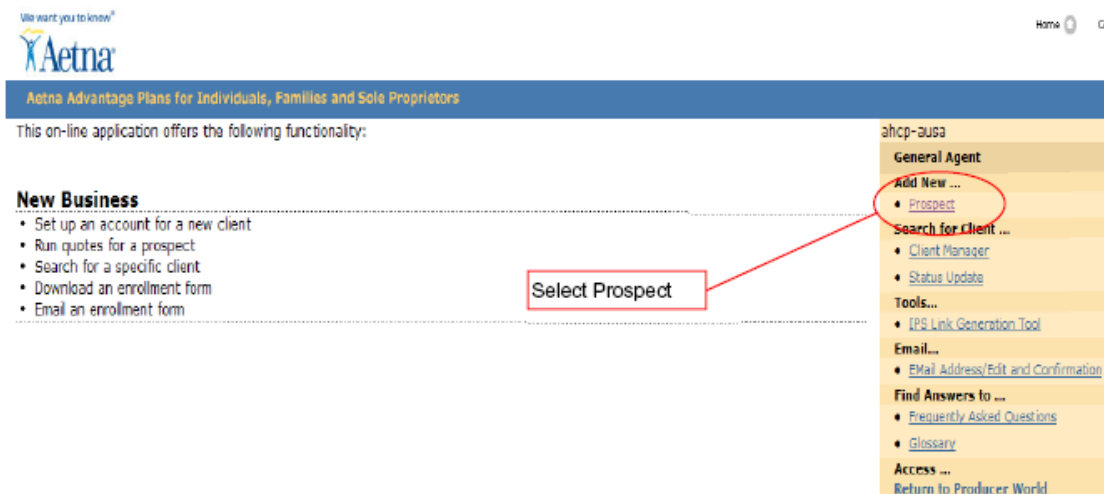
Generate a Quote—Part I: Add New Prospect

1. Log in to Producer world using the username and password that you set up during the registration process.



2. Repeat steps 1-7 as completed during the “Creating your Aetna Link” starting on page 5 of this hand book.

3. On the right hand side of the page click the link under “New” labeled “Prospect”



4. The following screen will allow you to put in your **Client’s Contact Information**

Account Information

Contact First Name* : MI :

Contact Last Name* : Best Way to Contact* :

Address Line 1 : Email Address :

Address Line 2 : Home Phone* : - -

City : Work Phone : - -

Zip Code* :

General Agent Information

General Agent:

5. On the same screen you will be able to tie AHCP to the policy by clicking the **Find** button under General Agent Information

General Agent Information

General Agent:

Select "Find"

6. A new window will open that allows you to search for AHCP. To do so type **America** in the last name field and **75063** in the zip code field and click **Search**.

Enter Search Criteria:

Producer First Name :

Producer Last Name/Agency :

Zip Code :

7. Select **America's Health/RX Plan Agency Inc.** This prospect is now tied to AHCP. When this client's policy is issued, your commission will be paid by AHCP and you will be eligible for advance commission, lead credits and your production will count toward the annual trip incentive.

Select Americas Health/RX Plans, Inc

General Agent Search Results

To select a General Agent, click the agent name.

General Agent Name	City	State	Zip Code
America's Health Care/ RX Plan Agency Inc.	Irving	TX	75063

8. On the following page a temporary username and password will be created for the client.



Aetna Advantage Plans for Individuals, Families and Sole Proprietors

PROSPECT CREATED

You have successfully created a prospect's account for client test.

Temporary Username: ctest158
Temporary Password: PL2608L5

***Temporary Usernames and passwords are case sensitive and must be entered exactly as listed above.**

What would you like to do?

- [Get A Quote for the Prospect](#)

9. Save this information on your computer—you will need this during the next step of the quoting process.

Temporary Username:
Temporary Password:

ctest158
PL2608L5

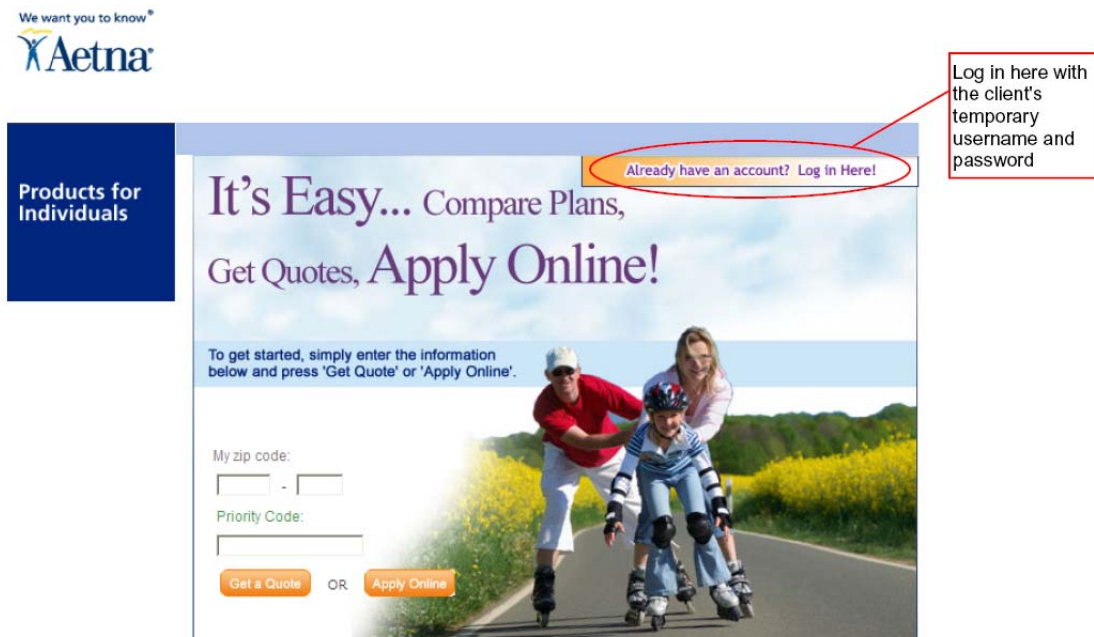
Save the temporary password that has been assigned to your client so that it can be accessed at a later date.

***Temporary Usernames and passwords are case sens**

What would you like to do?

Generate a Quote—Part II: Quote and Apply

1. Open your embedded link (Consumer Portal).
2. Click on **“Already have an account? Log in Here!”**... Use the temporary password that was generated for your client during the New Prospect set-up.



3. After logging in, you will be asked to create a permanent user name and password, a security question, and fill in general account information for your client. To save the information, click the **Register** button located at the bottom of the screen.

User Name & Password	
User Name* :	[] (6-20 characters)
Password* :	[] (6-14 characters)
Confirm Password* :	[] (6-14 characters)
Security Question	
Choose a Question :	What is your mother's maiden name? ▾
Answer* :	[]
Account Information	
Contact First Name* :	[]
Contact Last Name* :	[]
Address Line 1 :	[]
Address Line 2 :	[]
City :	[]
Zip Code* :	[]
MI :	[]
Best Way to Contact* :	[] ▾
Email Address* :	[]
Verify Email Address* :	[]
Home Phone* :	[] - [] - []
Work Phone :	[] - [] - []
Register	

4. You will receive confirmation that you have successfully completed the registration process for your client. Click on **Go to Welcome Page**.

REGISTRATION COMPLETED

Thank you. You have successfully completed the registration process.

What would you like to do?
[Go to Welcome Page](#)

testclient1234

Consumer

View My Account Details

• [My Account](#)

Create a Quote

• [Get a Quote](#)

Apply For A Plan

• [Apply](#)

Find Answers to ...

• [Frequently Asked Questions](#)

• [Glossary](#)

[Logout](#)

5. On the next screen, fill in the client's zip code and select the desired effective date. The priority code field should be left blank. Then click on **'Apply Online'**.



The image shows a registration form for Aetna Health Care Plan. The form is titled "It's Easy... Compare Plans, Get Quotes, Apply Online!". It includes a header with the text "Already have an account? Log in Here!". The form fields are: "My zip code:" with a text input containing "30310" and a dropdown menu; "My coverage date to begin:" with a date selector showing "04/01/2010"; and "Priority Code:" with an empty text input. At the bottom, there are two buttons: "Get a Quote" and "Apply Online", with "Apply Online" circled in red. The background of the form features a photograph of a family roller skating on a path.

6. Proceed through steps 1-7 of the application process. You will be able to compare plans on step 2.
7. After payment information has been provided and the application has been electronically signed, click on **Submit**. You will receive confirmation immediately with the client's App ID number.
8. Before the application moves to underwriting, you must log into Producer World to endorse the application as the writing agent. Follow the instructions provided in the next section of this booklet.

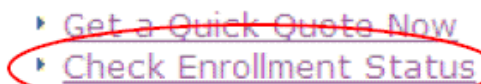
Endorsing Applications

1. Navigate to www.aetna.com
2. Login into Producer World using the username and password that you created during the registration process.



3. Follow steps 2&3 as listed in “Creating your Aetna Link” starting on page 5 of this hand book.

4. Under the heading “Services” select **Check Enrollment Status**.

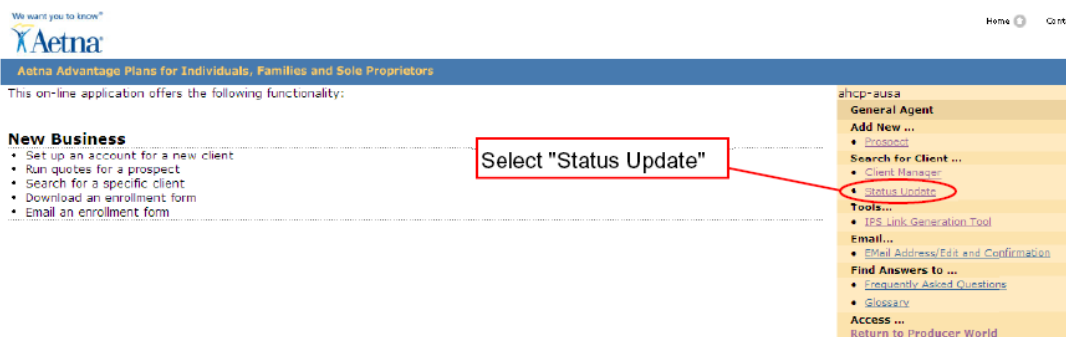


Select "Check Enrollment Status"

5. You may select any state on the next page.

3. Click **proceed** on the next page titled “Welcome to the Aetna Individual Purchaser Solution”

7. Click on **Status Update** link on the right hand side of your screen



8. Select **Pended for Agent Signature** in the drop down and click the search button.

The screenshot shows the 'Select Status' form. The 'Case Status' dropdown menu is set to 'Pended For Agent Signature'. The 'Search' button is highlighted.

9. Select the client's name of the application that you would like to endorse.

Select the client's name

Primary Applicant	Applicant	Home Phone Number	Requested Effective Date	App Received Date	State	Status	GA Name	Producer Name
Doe, John		5554567890	4/1/2010		MO	Pended for Agent Endorsement	America's Health Care/ RX Plan Agency Inc.,	Agent, Fred
Smith, Bob		5551234567	4/1/2010	3/19/2010	KY	Pended For Agent Endorsement	America's Health Care/ RX Plan Agency Inc.,	Agent, Fred

1

[Return to Search](#)

10. Click the **Endorse** button.

Account Info | Quotes | **Apps** | App Summary & Policy Info

Application Information

Application ID - 1234567

Requested Effective Date: 04/01/2010 Application Received Date:

Primary Applicant: John Doe Coverage Type: Subscriber

Producer: Fred Agent General Agent: America's Health Care/ RX Plan Agency Inc.

[View App](#) | **Endorse** | [View Status History](#)

Plan Information		Final Rate	Status
Primary Medical Product	Dental Optional Coverage		
MO - PPO 5000	Included		Pended for Agent Endorsement

11. You will then be asked if you are aware of undisclosed information and if you saw the applicant during the enrollment process. If you select no to the second question you are required to provide an explanation.

[Previous](#) | [View App](#) | **Endorse** | [Return to Client](#)

Plan Name: PPO 5000 **Quoted Rate(With Dental): \$105.00**

Are you aware of any information not disclosed on this enrollment form relating to the health, habits or reputation of any person listed on this enrollment form which have a bearing on the risk? Yes No *

If yes, please give explanation.

*** Did you see the proposed subscriber (and spouse, if applying) at the time this enrollment form was executed? Yes No *

If no, please give explanation.

Conducted phone application with client. Client advised of all proposed coverage and details. Client sent copy of application.

12. At the bottom of this screen you will be required to fill in personal information. If you do not have Tax Identification Number please use your social security number. When

you provide a signature please note that the signature must be the same on each line or it will not be accepted (capitalization, spaces, punctuation, etc.) When this step is completed click the **Endorse** button

The screenshot shows a web form for insurance application. The top section contains fields for:

- Name of Insurance Producer: Fred Agent
- TIN Number: * 123456789
- Street Address: * 1234 My Street
- Suite/Personal Mail Box (PMB):
- City/ State/ Zip Code: Anywhere, USA 12345
- Telephone No: * 555 - 987 - 6543
- Fax Number: * 555 - 555 - 5555

 Below this is a signature section:

- Signature of Insurance Producer: Fred Agent (two lines)
- Today's Date (MM/DD/YYYY): 3/25/2010

 At the bottom, there are four buttons: Previous, View App, Endorse (circled in red), and Return to Client. A red callout box points to the Endorse button with the text: "After filling in your agent information click the Endorse button".

13. After the Endorsement has taken place you will be directed back to the screen from step 8. If the Endorsement was complete the Endorse button will no longer be present on this page.

The screenshot shows the 'Application Information' screen with the following details:

- Account Info | Quotes | **Apps** | App Summary & Policy Info
- Application ID: 1234567
- Requested Effective Date: 04/01/2010
- Application Received Date:
- Primary Applicant: John Doe
- Coverage Type: Subscriber
- Producer: Fred Agent
- General Agent: America's Health Care/ RX Plan Agency Inc.
- Buttons: View App, View Status History
- Plan Information Table:

Plan Information		Final Rate	Status
Primary Medical Product	Dental Optional Coverage		
MO - PPO 5000	Included		Application Submitted Online

14. To return back to your list of clients with applications for ready for endorsement repeat steps 7-14.