



Aetna Quote and Enroll

One stop tool to complete and submit electronic applications for ALL products

Significant Features

Multiple products under one umbrella

Following senior supplemental products are available on Aetna Quote & Enroll

- Medicare Supplement (Aetna companies and Accendo)
- Final Expense (Protection Series product and Accendo)
- Protection SeriesSM
 - Cancer Insurance
 - Dental, Vision and Hearing Plus
 - Dental, Vision and Hearing
 - Heart Attack or Stroke Insurance
 - Home Care Plus
 - Hospital Indemnity/Flex
 - Home Recovery Care
 - Recovery Care

True Cross selling experience - Most common information will be used across, avoiding the need for re-enter multiple times

Single sign-on – from Aetnaseniorproducts.com to the tool

Shopping Cart – Price multiple products and add them to the cart to start enrollment

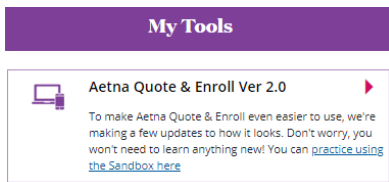
Product specific guidance – You will see specific sections based on the product selected for applicant(s).

In-good-order applications – key-in information required in each step. Enhanced data validation results in smooth processing

Multiple signature options – Get the applications signed in and submitted at your ease using our multiple signature options

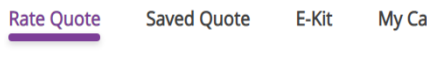
One submission – for multiple product applications / applicant(s). Processing starts immediately on submission

Track application status close to Real-time – Use the “enrollment tracker” report on the broker portal to view the application status. Report status will be updated in less than 30 minutes.



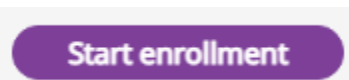
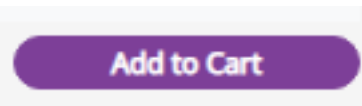
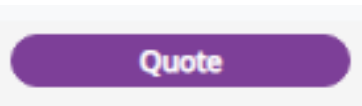
To launch the eApp, click on the "Aetna Quote &Enroll" link on the "My Tools" page.

Application will launch in a new window.



From the landing page of the eApp, you can -

- Quote
- Start enrollment
- Send eKits
- Mange your cases



Rate Quote

Enter zip code, state will be auto populated, enter date of birth, select Gender and tobacco indicator Click on **View Products**

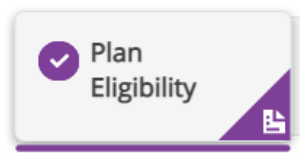
You can enter Applicant A and Applicant B details together if there are 2 applicants

- You will be able to select products available in theselected state.
- Select the product and update the inputs for the quote and click on "Quote"
- After the rates are displayed, select the requiredplan / rider and click on "Add to cart".

Save Quote or Start enrollment

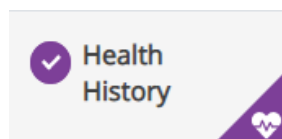
- To save quote for future use, click on "save"
- To start enrollment, click on "Start enrollment"

Enrollment process starts with providing Applicant Name, Date of birth and Legal resident details.



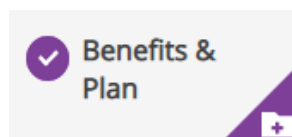
Plan eligibility

- Qualifies the applicant based on eligibility questions.
- Check eligibility - Validates type of application - open enrollment, guarantee issued, underwriting based on eligibility answers.
- Health questions - if applicant is Underwritten or the product requires health questions.



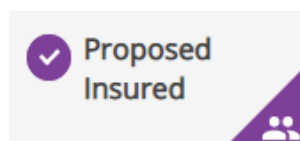
Health history

- Enter physician details, prescription details of the applicant
- Add more - click on "add more" to add more prescription information



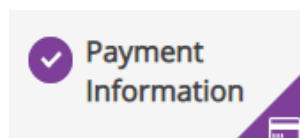
Benefits and plan

- Confirm the house discount question
- Confirm the effective date and plan selection
- Requote - if effective date or plan benefits are changed, requote the application



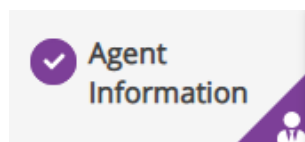
Proposed insured

- Name, date of birth, gender, state, zip code, tobacco are prefilled based on quote and start enrollment. Enter address, phone, email, social.



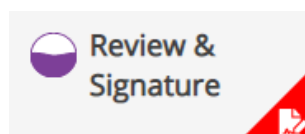
Payment information

- Allows ACH draft or Direct Bill.
- You can enter the bank details only once for any number of products (if the same account is used for multiple products)



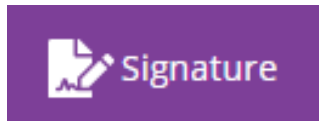
Agent information

- Validate the agent information, update if there are split commissions.
- Select the Policy delivery option
- Agent or applicant



Review and signature

- Summary of all the products selected.
- To edit the information, click on the corresponding tab and update the data



Signature process

In- person signature

- Allows to sign the app if the applicant is available "in person" with the broker.

Security question signature

- Allows to sign by answering the security question

Email signature

- Send application through email

* Additional signature methods are available based on product rules and business rules.

Email signature update for Aetna Quote and Enroll

We've updated our email signature process to make it even easier for you.

New 4-step email signature process

Step 1: Apply agent signature within Aetna Quote & Enroll (eApp tool)

Step 2: Enter applicant's email address and click "send to applicant(s) for signature"

Step 3: Applicant will receive an email to review and sign the application

Step 4: Application will be automatically submitted to the home office. No further action is needed from the agent or applicant.



Step 1: Agent applies signature within Aetna Quote & Enroll (eApp tool)

- Start signature process and select "Email signature"
- Read instructions and agree to the terms and conditions
- Click "Apply agent signature"
- The message "Signature process success" indicates the agent's signature is applied

In Person

Email Signature

Security Question Signature

Agent signature

Instructions

Apply your agent signature by clicking on the "I accept" checkbox and "Apply Agent signature". Once Applicant (and Owner if applicable), electronic signatures are completed, the application will be automatically submitted to home office.

☒ I agree to terms and conditions

Apply agent signature

Step 2: Enter applicant's email address and click "send to applicant(s) for signature"

- Enter applicant email address and confirm email address
- Read instructions and agree to the terms and conditions
- Click "Send to applicant(s) for signature"

- In the case of multiple applicants/owners, you'll need to enter the email addresses of all parties, then click "Send to applicant(s) for signature"

Applicant A (BRITTNEY TEST)

- Enter and verify the Applicant email address. Click on Send email to applicant.
- System will send the email to applicant(s) to apply their signature.
- Applicants should use the **last 4 digits of their SSN as password**, to open the application.
- Then they need to review and apply signatures to all required documents.

Email Address *

abcd@gmail.com

Confirm Email Address *

abcd@gmail.com

☒ I agree to terms and conditions

Send to applicant(s) for signature

Step 3: Applicant will receive an email to review and sign the application

- Your client will receive an email from Adobe, our e-signature partner echosign@echosign.com with subject "Signature requested on - Application for insurance"

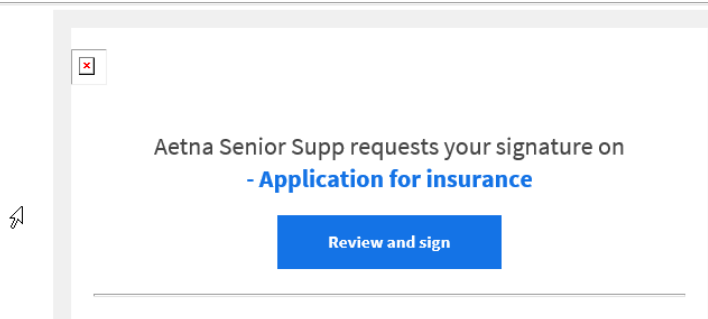


Aetna Senior Supp <echosign@echosign.com>

[EXTERNAL] Signature requested on "- Application for insurance"

If there are problems with how this message is displayed, click here to view it in a web browser.
Click here to download pictures. To help protect your privacy, Outlook prevented automatic download of some pictures in this message.

**** External Email - Use Caution ****



- Applicant clicks on "Review and Sign"
- Applicant must enter a password (the last 4 digits of their SSN)
- Applicant can review and sign the application PDF
- Once signature is completed, applicant(s) will receive email from echosign@echosign.com, with subject – "Completed: - Application for insurance". (Applicant will have option to download the application from there)
- This email indicates signature process is complete and the application has been sent to Aetna



Step 4:

- When applicant(s) complete signature, the application will be submitted to the home office.
- **NOTE:** In the case of multiple applicants, applicant-A will receive the email first. Once signature is completed by applicant-A, applicant-B will receive an email. When both applicants complete signature, application will be submitted to the home office.
- No further action is needed from the agent or applicant.

Frequently Asked Questions

How do I know that my client received the application?

In the Aetna Quote & Enroll tool, go to “My Cases.” You can see your application in “Signature” status. This indicates that we sent the application to your client. Note that sometimes there may be a delay in your client receiving the email.

State	Search by applicant name	Status	Start Date	End Date	
Select ▾	BRITTNEY TEST	Select ▾	MM/DD/YYYY 	MM/DD/YYYY 	Search

My Cases


Showing all 2 cases of last 3 months

Last 7 days

Last 14 days

In Progress

Pending Signature

	Start Date	Primary Applicant Name	State	Status	Actions
	2021-08-24 15:06:24.52	BRITTNEY TEST	TN	Signature	Open

How do I know if Aetna received my client’s application?

There are multiple ways you see the status of your application:

1. “My Cases” on Aetna Quote and Enroll

- a. Go to “My Cases”; click on “Open” and you can see the submission status and the policy-number.
- b. If application qualifies for quick decision Underwriting, you will see the decision there.

Submitted policies:

Final Expense

Accendo Insurance Company

PANDER PAGE	Preferred Level Plan	Monthly	2020-09-01	ACC6206779	PDF	Submission Successful	\$112.88
Congratulations, this applicant is approved for coverage. We are now creating the policy documents. You can view the enrollment tracker on www.aetnaseniorproducts.com to see the real time status.							

2. Email alerts

- Sign up for our “application submission alert” on **AetnaSeniorProducts.com**, under “Alerts and Settings” on the main page of the website
- Once we receive your client’s application, you will get an email notification instantly

Schedule Pages for applications submitted	<input checked="" type="checkbox"/>
Applications that are declined	<input checked="" type="checkbox"/>
Applications that are declined	<input checked="" type="checkbox"/>
Applications that have been submitted/received	<input checked="" type="checkbox"/>

3. Enrollment tracker

- Login to **AetnaSeniorProducts.com**. You can check the policy number listed on the “Enrollment Tracker” link on the main page of the website

Enrollment Tracker

Click on the purple “Check Auto UW” button to get the automated underwriting decision – Approved, Routed to UW, Decline. Refresh this page by pressing the F5 key on your keyboard to see the updated decision. You may do this multiple times until the underwriting decision box turns either red, yellow, or green, this can take up to 5 minutes.

Enrollment Tracker - Agent Guide

[Download Excel](#)

App Status	ALL	State	ALL	Product	ALL	Agent	ALL	Policy Number	acc6206779	GO
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Showing 1 to 1 of 1 entries

Results per page: 10

Submitted date	Policy number	Member name	Enrollment status	Issue state	Product	Plan	Effective date	Writing Agent	Message	Application pdf
2020-08-21	ACC6206779	Pander Page	Approved - Quality check	AR	Final Exp	FE Level	2020-09-01	GNW0009894 - Christopher Westfall	Create View	PDF

Will I be able to resend the application to my client (for example: if my client cannot find the first email that I sent)?

If the applicant has not completed the signature and sent it to the home office, you can cancel an email signature in Aetna Quote and Enroll. You would need to sign the application again and then send it to applicant again.