

# How to submit an Individual Medicare contract

**NEW AGENT VERSION**

# Onboarding

---

## What triggers the onboarding process?

Your upline recruiter will invite you to contract with Aetna Medicare. Specifically, your upline will create an onboarding “case” in our contracting system. An email invitation will be sent directly to you from Aetna Medicare.


- The link within the email will expire within thirty (30) days of receipt.
- Contact your upline if the link has expired.
- You may only have one *active* case if you receive multiple invitations.

# Producer invitation

---

## Step 1

Open the onboarding invitation. The subject line will read, "You have been invited to contract with Aetna Medicare!"



Dear John Smith,

Congratulations! You have been recruited to sell for Aetna Medicare at the <invited> level. Please follow the link below to get started. This link will expire within 30 days of receipt.

**Click here to get started:** [\[Redacted Link\]](#)

If you have any questions, please contact the Aetna Medicare Broker Services Department at (866) 714-9301 8 a.m. to 8 p.m. ET, Monday through Friday.

**Recruiter Name:** ABC Agency  
**Recruiter Email:** [abcagency@gmail.com](mailto:abcagency@gmail.com)

# Producer World

---

Follow the link within your invitation which will take you to Producer World, an online service center to help you sell Aetna products. You will be asked if you have access to the Producer World website.



Welcome!  
Do you have access to the Producer World website?

Yes No

- **If you do not have an account**, you will be presented with a registration screen. Complete registration and log in.
- **If you do have an account**, you will be presented with a log in screen. Log in to your account.

# NIPR validation & W9

---

## Step 2

Upon login to Producer World, your records will be pulled from the National Insurance Producer Registry.

- **Note:** Be sure to update your personal and firm information with the National Insurance Producer Registry [here](#).

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

# Contracting tabs

## Step 3

Next, you will be guided to Medicare Producer Contracting where you will be prompted to complete your contract.

General	Licenses	Background Questionnaire	Background Authorization	Banking Information	Contracts
<b>Producer Demographics</b>		Please make sure you have certified for all products you intend to sell.			
First Name	John	Address Line 1	1 Personal Street		
Middle Name	Middle	Address Line 2	Apt 22		
Last Name	Doe	City	Smithville		
Suffix	Jr.	State	TX		
Date of Birth	01/01/1990	ZIP	98765		
NPN	[REDACTED]				
Cell Phone	111-111-1111				
Contact Email	[REDACTED]				
<b>Firm Demographics</b>					
Firm Name	Agency Alpha	Firm Address Line 1	3 Firm Lane		
Firm Tax Id	[REDACTED]	Firm Address Line 2	Office 123		
Firm Email	agency@aetna.com	Firm City	Helena		
Firm Contact	222-222-2222	Aetna Business State	TX		
		Firm Zip	76543		

# Contracting tabs - General

The General tab in Producer Application is auto-populated from the NIPR information. Review your information and click "Submit."

- **Note:** You may choose the "Quick Save" option to save your progress and exit the system if you need to return at a later time to complete your contract. In order to return where you left off, log into Producer World, go to the Individual Medicare tab and click, "Medicare Producer Contracting."

Please make sure you have certified for all products you intend to sell.

General Licenses Background Questionnaire Background Authorization Banking Information Contracts

Producer Demographics

First Name	BSDTESTFIRST47	Address Line 1	(\$=2727 LAKE VAN NESS C)
Middle Name		Address Line 2	
Last Name	BSDTESTLAST47	City	(\$=Avenue)
Suffix		State	(\$=MD)
Date of Birth	01/01/1989	ZIP	
NPN	(\$=4507)	Producer Business Phone	
Contact Email	(\$=cubellis@aetna.com)	Producer Cell Phone	

Quick Save Submit

# Contracting tabs - Licenses

The Licenses tab is also auto-populated from the NIPR information. Review the information and click "Submit."

General **Licenses** Background Questionnaire Background Authorization Banking Information Contracts

Producer NIPR Active Licenses Please make sure you have certified for all products you intend to sell.

License State	License Number	License LOA	Effective Date	Expiration Date	Residency Status
TX		17 - Accident & Health	11/11/2014		N
TX		17 - Accident & Health	08/04/2014	05/31/2020	N
MD		03 - Health	11/11/2014		Y
MD		03 - Health	08/04/2014	05/31/2020	Y
CT		17 - Accident & Health	11/11/2014	04/30/2020	N
CT		17 - Accident & Health	08/04/2014	05/31/2020	N
AR		19 - Accident & Sickness	11/11/2014	06/30/2019	N
AR		19 - Accident & Sickness	08/04/2014	05/31/2020	N
AK		03 - Health	11/11/2014		N
AK		03 - Health	08/04/2014	05/31/2020	N

10 total rows, displaying from 1 to 10

[Quick Save](#) [Submit](#)



# Contracting tabs - Background Questionnaire

Please make sure you have certified for all products you intend to sell.

General Licenses **Background Questionnaire** Background Authorization Banking Information Contracts

### Regulatory Actions

Have you ever had an insurance or securities license denied, suspended, cancelled, or revoked? \*  Yes  No [required]

Has any regulatory body ever sanctioned, censured, penalized, or otherwise disciplined you? \*  Yes  No [required]

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 [required]

### 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 [required]

Are you in possession of a valid 1033 waiver from a state DOI or other regulatory authority for the above offense(s)? \*  Yes  No [required]

### 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

Answer all questions on the Background Questionnaire. If Yes is selected for any questions, provide an explanation text box. Once the questions are answered click "Submit."

General Licenses **Background Questionnaire** Background Authorization Banking Information Contracts

### Regulatory Actions

Have you ever had an insurance or securities license denied, suspended, cancelled, or revoked? \*  Yes  No

If you answered "Yes", please provide an explanation.

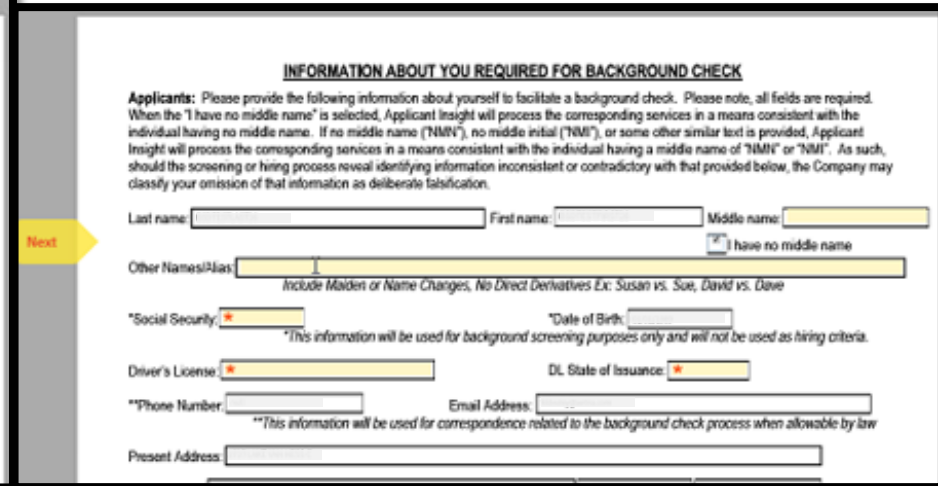
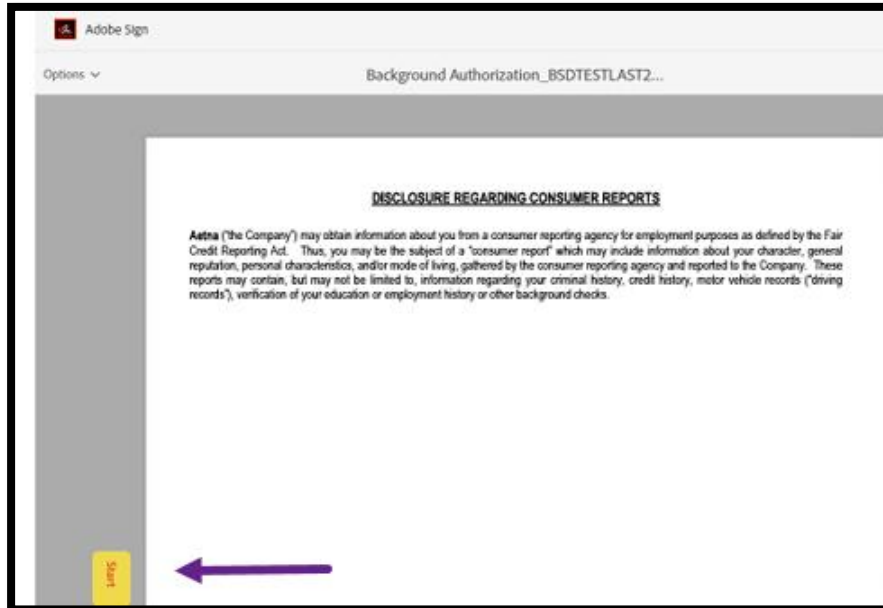
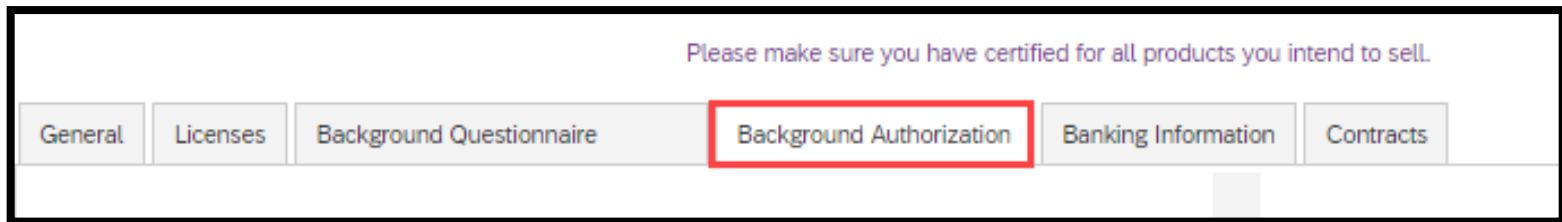
**B I U** [Rich Text Editor Icons]  
Size - Font - Normal - [Rich Text Editor Icons]

→

# Contracting tabs - Background Authorization 1 of 2

Click the “Start” tab to activate the Background Authorization. Once the document opens, complete the fields then click the “Next” tab.

**Note:** Fields with an asterisk are required.



# Contracting tabs - Background Authorization 2 of 2

You will electronically sign the form. After typing your signature, click “Apply” then select the blue “Click to Sign” button. You’ll receive a notification that the Background Authorization form is complete and you’ll be given the option to download a copy. Next, click “Submit.”



# Contracting tabs - Banking Information

Click the check box to acknowledge your bank account information applies to all lines of Aetna business. Select the *Bank Account Type* from the drop down menu and complete the remaining fields. Click "Validate Routing Number" which validates and populates the bank name and address. Review the information then click, "Submit."

General Licenses Background Questionnaire Background Authorization **Banking Information** Contracts

Acknowledge below that you are aware of the impact on all business lines with this change.

Bank information changes submitted via this form apply to all Aetna lines of business

Bank Account Type \*

Bank Routing Number \*

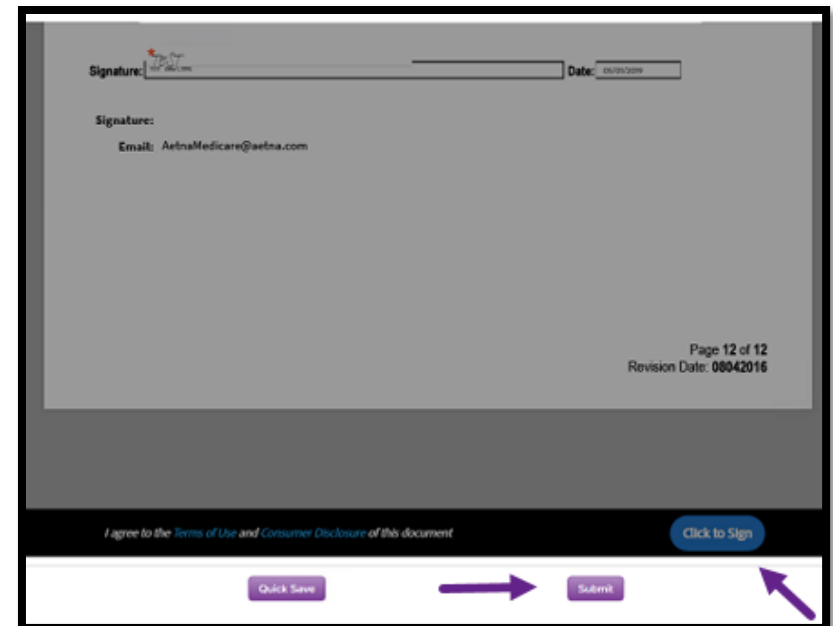
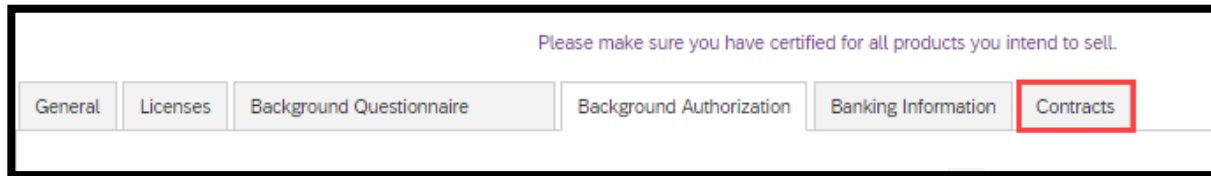
Bank Account \*

**Validate Routing Number**

Bank Name  
Bank Address Line 1  
Bank Address Line 2  
Bank City  
Bank State  
Bank Zip Code

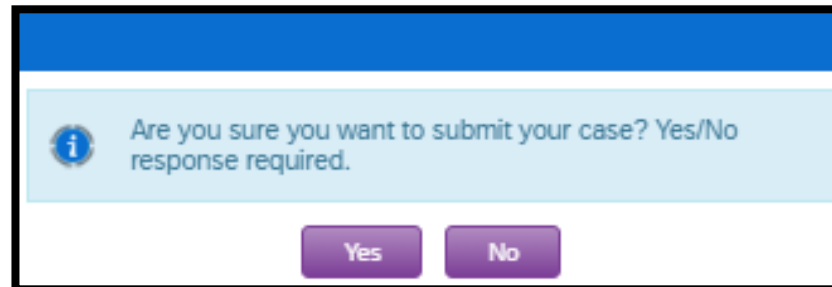
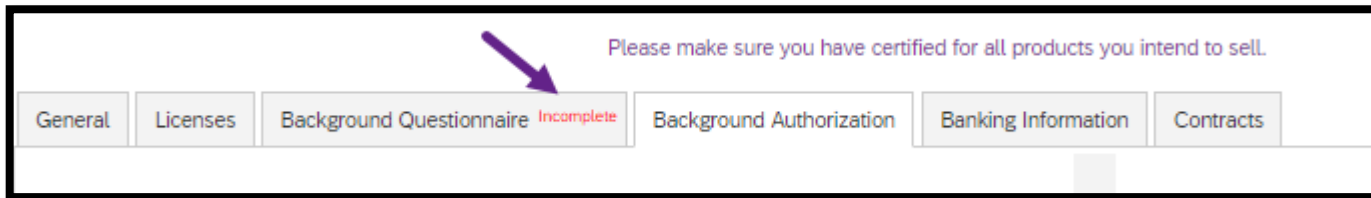
# Contracting tabs - Contracts

Click the “Start” tab to initiate completion of the producer agreement. Fields with an asterisk are required. Click “Next” to advance through the form. Select the blue “Click to Sign” button. Once the Producer Agreement is signed and saved, you’ll be given the option to download a copy. Click “Submit.”



# Contracting tabs - Case Submission

If a tab was not completed, it will reflect a red “Incomplete” indicator. Return to the tab and complete all required documentation. Once all tabs are completed, click “Submit.” You’ll be asked if you’re sure you want to submit your case. If yes is selected the case will move forward for processing. If no is selected, you will remain on the page and may edit your contract if necessary.



# What happens next?

---

Your contract submission will be processed by the Aetna Medicare Broker Services Department.

- **Note:** Processing of your contract will not begin until your Aetna Individual Medicare certification is completed.

Upon completion of your contract, you will be appointed by Aetna for Individual Medicare products in the pre-appointing states where you hold an active license. Just-in-time appointing states will be ordered after a policy is written.

# Notification

---

You will receive one of the following email notifications from **Aetna Medicare**:

- a) “Your Aetna Medicare contract has been approved”
  - **Note:** An approved contract does not confirm ready-to-sell status
- b) “Your Aetna Medicare contract has been rejected”
- c) “Please complete your Aetna Medicare contract submission”

If additional information is needed to complete the contract, you will receive a “Missing Information” email notification from **Broker Support**.



# When am I ready-to-sell?

---

- 1) You are ready-to-sell (RTS) when you receive your RTS notification from the Aetna Medicare Broker Services Department indicating the states where you are ready-to-sell.
  - **Reminder:** Notification of your contract approval does not mean you have achieved ready-to-sell (RTS) status. You must receive the RTS notification to market Aetna Individual Medicare products.
- 2) You may check your RTS status on the Broker Readiness Report via Producer World.
- 3) Refer to the Producer Guide for additional ready-to-sell information.

# Contracting Summary

UPLINE	PRODUCER			AETNA
<p><b>INVITATION</b></p> <p>Upline logs into Producer World, navigates to the Individual Medicare tab and clicks Medicare Producer Contracting.</p> <p>Upline creates an onboarding case which triggers an email invitation to the producer from Aetna Medicare.</p>	<p><b>1. PRODUCER EMAIL</b></p> <p>Producer receives the email invitation and follows the link to Producer World.</p> <ul style="list-style-type: none"> <li>• A producer without an account registers and logs in.</li> <li>• A producer with an account logs in.</li> </ul>	<p><b>2. NIPR &amp; W-9</b></p> <p>Upon login to Producer World, NIPR records are passed to the Aetna Medicare contracting system.</p> <p>If we require submission of a W-9, a form is presented for completion.</p>	<p><b>3. CONTRACTING</b></p> <p>Producer is guided to Medicare Producer Contracting and prompted to complete the contracting case.</p>	<p><b>NOTIFICATION</b></p> <p>Producer receives email notification from Aetna Medicare upon approval or rejection of contract.</p>