# Individual Medicare Producer World Tour 2023

### Contents

### Click to jump to any section

- <u>General Navigation</u>
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- Producer Guide
- Contracting and Ready-to-Sell Status
- Ordering Aetna MAPD Enrollment Kits
- Ordering SilverScript PDP Enrollment Kits
- Compensation
- Generate Reports
  - Member Application Search
  - <u>Commission Reports</u>
  - Pending Application Report and Medicare Book of Business Report
  - Exporting Reports
- Provider/Pharmacy Network
- Miscellaneous





# **General Navigation**

# **Registration and Login**

To get started, you will need to access the <u>Producer World</u> site.

https://www.aetna.com/insurance-producer.html



## **Accessing Individual Medicare**

Producer World houses multiple lines of business.

Access Individual Medicare information by clicking on Individual Medicare on the top menu bar.



Use the Quick Links menu or navigate to the appropriate tab to access the desired information



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Products & services Quoting & Renewal Enrollment & billing Providers & medication Tools & forms Compensation Reporting & Book of Business License and appointment Manage personal & firm profile Manage access for others

Contact us / Help

The gray menu on the left displays functions for all lines of business.

This menu can be used for compensation statements, managing report access, and updating EFT information.

For accurate and complete Individual Medicare information, use the Individual Medicare Section



# Individual Medicare Tab Navigation

### Individual Medicare – Tab Navigation

Plans Requirements to sell Learn Share Network Enroll Reports Compensation



Listed below are some key items available on each tab. Make sure to take some time to navigate through each section and see that there is also much more information available! We will go over a few high traffic items in more detail.

Plans	Requirements to Sell	Learn	Share
What we offer	RTS and Compliance	Agent-use only materials	Client-use materials
Plan Guides	RTS and requirements	<ul> <li>Marketing/sales tools</li> </ul>	MMS Marketing Studio
First Looks	Market Specific Training	Training Videos/Presentations	Enrollment Kits
Plan Tools	Onboarding/Contract Changes	Quick Reference Flyers	Sales Presentations
SilverScript Portal	Compliance & Oversight	Guidance for Marketing	PTC/SOA Forms
	CMS Marketing Guidelines	Broker Newsletters	Educational items for clients
		Video Podcasts	Member Forms
		SEP announcements	
Network	Enroll	Reports	Compensation
<ul> <li>Where to go for services</li> <li>Provider directories in PDF</li> <li>Online provider search tools</li> <li>Online pharmacy search tools</li> <li>Online dentist search tools</li> </ul>	<ul> <li>Enrollment info and tools</li> <li>Think Agent Virtual Sales App</li> <li>Enrollment Kits</li> <li>Enrollment Reports</li> <li>Mail or Fax Enrollment</li> <li>Upload Applications</li> <li>Health Risk Assessment (HRA) Information</li> <li>Forms, Guidance &amp; Instructions <ul> <li>SEP Guide</li> <li>Broker Attestation Form</li> </ul> </li> </ul>	<ul> <li>Sales related reporting</li> <li>Access Reporting <ul> <li>Commissions</li> <li>Pending Enrollments</li> <li>Book of Business</li> </ul> </li> <li>Reporting Help</li> <li>Reports Information</li> <li>Enrollment Termination Codes</li> <li>Licensing Reports</li> </ul>	<ul> <li>Compensation support and AOR</li> <li>Commission Eligibility Requirements</li> <li>Forms, Guidelines &amp; Instructions</li> <li>How and when we pay</li> <li>Reports and Statements</li> <li>Agent of Record Information <ul> <li>Agency acquisition</li> <li>Agent Death</li> <li>General Info &amp; Policies</li> <li>AOR Changes</li> <li>Upline Mgmt of LOAs</li> </ul> </li> </ul>

Use the Quick Links menu for direct access to the most utilized areas of Producer World

	Quick links:	Select an item 🗸	
		Select an item	
Plans	Requirements to sell L	<ul> <li>2024 Certification</li> <li>2023 Producer Guide</li> </ul>	ompensation
		> Enrollment kits	
		> Forms	
Are you	ı ready to sell our Individua	<ul> <li>Onboarding: manage downline cases</li> <li>Onboarding: complete your case</li> </ul>	
Diama		> Provider search	
Plans		<ul> <li>Reports: member apps, book of business, commission</li> <li>SilverScript Agent Portal</li> </ul>	
MA/MA	PD	> Verify your ready-to-sell status	

Quick Links choices include links to the certification site, the Broker Ordering Module (BOM) to order enrollment kits, and SilverScript Agent Portal. It also provides direct access to Individual Medicare reporting for book of business and commission reports and the Onboarding platform for contracting.



# **Producer Guide**

### **Producer Guide**

The Producer Guide is located as a hyperlink in the Quick Links Menu on the Plans tab. When you click on the Producer Guide link, the guide automatically opens.





### **Producer Guide**

The Producer Guide is separated into sections.

Each section within the Table of Contents contains hyperlinks to take you directly to any subject matter.

### Introduction

- Key Terms
- Ready to Sell
- Marketing materials
- The Enrollment Process
- Compensation
- Upline Obligations & Administrative Services
- Confidentiality & Record Retention
- Compliance & agent oversight

### Table of Contents

Use the quick links below to jump to specific sections. If you'd like to search for a specific key word or term, just press CTRL+F.

#### Introduction

- Welcome!
- How to Use This Guide
- Aetna Producer World
- Aetna Producer World Directory Aetna Medicare Broker Services

#### Key Terms

Key Terms

#### Ready to Sell

- Ready to Sell
- What You Need to be Ready to Sell
- Certification
- AHIP/CVS Aetna Medicare Compliance Training & Exam
- Certification Checklist
- Onboarding
- State Requirements
- License & Appointment Processing 2023 Plan Offerings
- E&O Insurance Program
- Reminders
- Checking Your Ready-to-Sell Status

#### Marketing Materials

- Marketing Materials
- Using the Aetna Logo
- Co-Branding

#### The Enrollment Process

- Before Completing an Enrollment Application
- Completing the Enrollment Application
- MA/MAPD Enrollment Application Submission
- PDP Enrollment Application Submission Telephonic Enrollments
- Broker-Enabled Health Risk Assessment (HRA) Program

#### Compensation

- Compensation
- Compensation Resources
- Renewals
- Chargebacks & Compensation Recovery
- Payment Disputes

#### Upline Obligations & Administrative Services - Producer Reconsiderations

- Upline Organizations
- Upline Obligations
- Administrative Services

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#### **Confidentiality & Record Retention**

- Confidentiality
- Record Retention

#### Compliance & Agent Oversight

- The Importance of Compliance
- How to Stay Compliant
- Fraud, Waste, & Abuse
- Section 1557 of the ACA
- Telephone Consumer Protection Act
- Third Party Marketing Organizations (TPMOs)
- Third Party Marketing Organization (TPMO) Oversight
- Third Party Marketing Organization (TPMO) Disclaimer
- Agent Oversight Program
- Producer Monitoring
- Complaints & Marketing Incidents/Allegations
- Complaints & Marketing Incidents/Allegations Process
- Producer Terminations
- Automatic Producer Terminations
- Producer Suspensions



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# **Contracting and Ready to Sell Status**

### **Requirements to Sell**

Contracting information can be found in the Requirements to Sell tab or the Quick Links Menu.

- Complete annual certification
- Have completed onboarding
- Verify your RTS Status

You can also find the following on this tab.

- Market-specific training (how to sign up for an in-person or webinar as well as selfstudy options.
- Onboarding new producers (for uplines)
- Contract changes

Bet	fore selling Medicare products, you mu	st be "ready to sell" (RTS). To be RTS you must:
1.	Complete annual certification	<ul> <li>Go to AetnaMedicareProducerCertification.com</li> <li>Learn about annual certification</li> </ul>
2.	Have completed onboarding	<ul> <li>Per CMS MCMG (110-1), compliance with state licensi and/or appointment laws is required. Once onboarde producers have the responsibility to maintain state li continuing education, and all other state requiremen</li> <li>Learn more in the Producer Guide</li> </ul>
		<ul> <li>Actively verify your PTS status prior to colling in each</li> </ul>
3. Ma	Verify your RTS status	ining for the markets/states where you sell
3. Ma •	Verify your RTS status	where you conduct business
3. Ma • •	Verify your RTS status	<ul> <li>Actively verify your KTS status prior to sening in each where you conduct business</li> <li>ining for the markets/states where you sell</li> <li>&gt;)</li> </ul>
3. Ma • •	Verify your RTS status	<ul> <li>Actively verify your KTS status prior to sening in early where you conduct business</li> <li>ining for the markets/states where you sell</li> <li>•</li> </ul>

## Certification

The certification site can be accessed through the link on the Requirements to Sell tab or go to <u>AetnaMedicareProducerCertification.com</u>

<u>Click here to learn more about annual certification</u>

### We offer two options to choose from to begin Aetna/SilverScript certification.

### **AHIP Medicare training**

### Certification option #1

- This option includes AHIP Medicare training.
- AHIP Medicare training is discounted if taken directly through <u>AetnaMedicareProducerCertification.com</u>.
- **Cost:** \$125.

### Aetna Medicare Compliance Training AHIP Alternative

### Certification option #2

- This new option allows you to bypass the AHIP Medicare training component and complete an alternative Aetna/SilverScript-only training instead.
- This <u>no-cost certification option</u> will not transfer to other carriers and applies **only** for Aetna MA/MAPD or SilverScript PDP products.

• **Cost:** \$0.

Once you complete AHIP or AHIP Alternative, you must complete the remaining three modules (Core, PDP, MA/MAPD) to be fully certified for Individual Medicare.



## Contracting



# **Onboarding Steps**

For new producers or those wishing to re-contract

Step 1: Complete annual certification

Step 2: Obtain an onboarding invitation from your upline

Step 3: Complete all required forms in our Medicare onboarding system

Step 4: Pass a background investigation\* and regulatory review check (if applicable)

Step 5: Aetna Medicare Broker Services will process your onboarding case

\*You are required to notify Aetna in writing of any criminal charges or convictions involving fraud, dishonesty, breach of trust, or theft that may occur after the background check is completed.

### Learn more in the Producer Guide



## Contracting

Onboarding invitations are sent via email with a URL to click to start the onboarding process. You can also access your onboarding cases through the Quick Links menu. Note: You must have clicked the URL at least once to view open onboarding cases.



### **Onboarding: manage downline cases**

This link will take you to the contracting site, Callidus. This is where upline and downline agents can manage their contracting cases.

<b>♥aetna</b> *	
命 Home	
⑦ Help	Open cases assigned to me

### **Onboarding: complete your case**

This link will take you to the Medicare Contract Maintenance page, this will allow you to review any of your contracting cases. You can see the progress and status of the case from here.

Position :		
	C	Case Status: APPROVE
	Progress	Date
	Position :	Position : C



## **Ready to Sell Map Tool**

When you click the link to verify your Ready to Sell (RTS) status, you are taken to an interactive map.

Be sure to click the year you are wanting to check on the top left.

RTS status is color-coded by product.

You can hover over each state to verify the date you were RTS each product.

If you are not RTS in any states, you may need to complete the contracting process or check if your licenses are up to date.





## **Additional Requirements to Sell Information**

The remaining resources on the Requirements to Sell tab include:

### Market-specific training

- Sign up for market, product, or program trainings or find self-study resource materials
- Onboarding new producers
  - Uplines can send the Onboarding Guides to any peers or downlines. Instructions on how to contract as agency can be found here, as well.
- Contract changes
  - The Transfer Release Policy and Forms can be found here.
- Compliance and agent oversight
  - Resource documents including Scope of Appointment requirements
- CMS Marketing Guidelines
  - Resources documents outlining CMS requirements for marketing compliance

#### Market-specific training

- · Sign up for an in-person or webinar training for the markets/states where you sell
- Self-study options:

Make a selection

#### Onboarding new producers (for uplines)

- · Access our onboarding system
- Learn about agency access
- Learn about onboarding downlines
- · Onboarding guides to share with your downlines:

Select a document

#### Contract changes

- Learn about making changes
- Forms and guidelines:

Select a document

Compliance and agent oversig	ht
Compliance and agent oversight	resources
Select a document	~
MS marketing guidelines	
Select a document	

~



# **Ordering Aetna MAPD Enrollment Kits**

## Accessing the Broker Ordering Module (BOM)





## **Ordering Enrollment Kits on BOM**

		•
Sign In		
Email/User Name *		
Password *		
Forgot password?	OGIN	

If you cannot log in, you may not be Ready to Sell. Contact your Market Associate or Broker Support for assistance

Selections can be made for year, state, product, and language.

Once the desired selections are made, click "Next."

#### The top right-hand corner of the home screen shows a navigation menu. Need Help 🧐 Need Help – Submit issues or download the User Guide Account Profile – View/Update personal details and view order history Shopping Cart – View, Edit, Save, or Submit pending orders Log Out – Log out of Broker Ordering Module Welcome. Need Help ♥aetna<sup>®</sup> Medicare Broker Materials $\mathbf{h}$ A Message Product Language Welcome to our new Broker 2021 AL MAPD English Ordering Module (BOM)! Our new ordering portal is designed to be easier and more efficient to use NEXT > You can learn the new features of our ordering portal by downloading our User Guide from the Need Help page by clicking the question mark icon

₽

2024 PDP kits are available on the Broker Ordering Module. 2023 PDP kits will still need to be ordered on the SilverScript Agent Portal.

# **Ordering Enrollment Kits on BOM**



The left side menu provides the ability to filter to only specific types of documents. Check or uncheck boxes depending on the materials desired.

Click on "View Counties and Contract/PBPs" to see what counties and contracts are available for the plan, send a digital kit through Think Agent, download a pdf of the enrollment kit, and add the kit to the shopping cart. (See next slide for more detail)



## Sending Digital Kits or Downloading a PDF

Clicking on View Counties and Contract/PBPs (as shown in previous slide) opens a more expansive menu of options for the selected materials.



section.



## **Ordering Enrollment Kits on BOM**

Sho	pping Car	t Contents		
Action	Product	ß	Quantity	
	Better together	2021 NORTHERN ALABAMA (PPO)	2	
SAVE C	DRDER		(	CHECK OUT

Verify the Shipping Address is accurate and the correct location for the kits to be delivered. \*This can not be a PO Box.\*

Click "Place Order". Failing to click "Place Order" means the order will not be processed and the items will remain in your cart.

Order Confirmation 👼			Order #: A10127697713044541780 Date: 8/6/23 20:55 Order Status: Approved Job Type: Broker
Address 1	Ship to: Jim Woods <james.woods@oneildata.com> ( 310-448-6800   12655 f</james.woods@oneildata.com>	BEATRICE ST   LOS ANGEI	LES   CA   90066-7003 Status: Processing
Product	QuanSty	Delivery Date	Tracking Number
	(ir)		

Go to your shopping cart to review and/or place your order. Click "Check Out" when your order is ready to submit.

hipping Addr	ess					
First Name *	MI	Last Name*	Phone#	Email* joesm	ith@insurance.	
ddress Line 1* 23 Main	Ad	dress Line 2	 			
Jity Denver	State/Province	Zip/Postal Code *	Country *	<b>.</b>		
or required fields						
for required fields tact Informatio	n					
for required fields tact Informatio	n					
for required fields tact Informatio	n 					
for required fields tact Informatio	n 					

The Order Confirmation page provides the order number, status, delivery address, and lists items ordered. It can be printed by clicking the printer icon.



# **Ordering 2023 SilverScript PDP Enrollment Kits**

## **Ordering 2023 PDP Enrollment Kits**

Ordering 2023 PDP kits is still completed on the SilverScript Agent Portal.

Clicking the SilverScript Agent Portal option on Quick Links will automatically log you into your Agent Portal account.





# **Compensation General Information**

There are three primary resources available for commission information:

- 1. Individual Medicare statements
- 2. Aetna compensation statements
- 3. Individual Medicare commission reports

Next, we'll explain the benefits of each option.

	Individual Medicare Statements	Aetna Compensation Statements	Individual Medicare Commission Reports
Recommendation	Individual Medicare statements are best suited for individuals who do not have downline	Aetna Compensation statements are best suited for individuals who do not have downline	Individual Medicare Commission Reports are the most comprehensive and they are easy to filter and sort
Delivery	Emailed systematically	Producer World on-demand	Producer World on-demand
Frequency	Arrives weekly on Thursday	Updated weekly on Monday	Updated weekly on Monday
Lines of business	Medicare only	Medicare, Commercial	Medicare only
Available formats	PDF only	PDF, Excel	PDF, Excel, Word, RTF, CSV, XML
Special notes	Automatically delivered Does not include HRA	Does not provide writing agent information or extensive member detail.	The <i>Commission Payee Detail</i> <i>Report</i> provides full member and producer detail for downlines
	Currently only available in PDF format	Always aligns to your bank deposit.	Download period is by month which may be filtered and sorted by check date and writing agent. Now includes HRA Payments
Navigation	N/A – received via email	Compensation (left menu)	Individual Medicare > Reports



On the Compensation tab you will find the following information related to commissions:

- How and when we pay (explains the first-year commission and true ups)
- Commission eligibility requirements
- Agent of Record information how to change, retention policy
- Reports and statements additional information on how to run and view reports

You can also find information about Agent of Record (AOR) and how to manage or change this data.

General information and policies will explain our retention policy and duplicate application process in regard to an AOR.

Plans Requirements to sell Learn Share Network Enroll Reports

#### Compensation

#### Compensation

In addition to the resources provided here, be sure to refer to your contract and the applicable compensation schedule attachments provided to you by Aetna. To the extent there is any conflict between the information here and the terms of your contract (including the applicable compensation schedules) with Aetna, the terms of the contract shall apply.

Contact the Aetna Medicare Broker Services Department at 1-866-714-9301 or if you prefer to email us, complete this contact us form and we'll respond within 48 hours.

Commission eligibility requirements

Forms, guidelines and instruction

How and when we pay

Reports and statements

#### Agent of record

Agency acquisition
Agent death or incapacitation
General information and policies
ndividual agent of record changes
Member-initiated reassignment
Jpline management of LOA business



#### A guide to how we pay commissions

You'll receive compensation as set forth in the **compensation schedules** provided by Aetna, assuming all applicable requirements for receipt of payment are met. The First Year Commission (FYC) payment is always made at the Initial FYC (Not New) rate. Then, after the Centers for Medicare & Medicaid Services (CMS) deems the member is new to Medicare, the first payment is reversed, and the CMS New rate is paid.

#### Understand how you are compensated for new business (true-up)

The first payment is always made at the Initial FYC (Not New) rate. Then, if CMS confirms to us the beneficiary is new to Medicare, meaning <u>not in the Medicare system before the current policy</u>, the first payment is reversed, and the CMS New rate is paid. You're paid the full year amount on new business, <u>regardless of the effective date</u>.

#### Understand how you are compensated for unlike plan changes (true-up)

The first payment is always made at the Initial FYC (Not New) rate. If it is determined the beneficiary is making an unlike plan change such as switching from PDP to MA/MAPD or vice-versa, the first payment is reversed, and the CMS New rate is paid. You're paid a <u>prorated amount based on the new effective date</u>, when the effective date is February 1st or later.

#### The compensation year is January 1 through December 31.

- You'll be paid the full CMS New rate for a beneficiary deemed by CMS as "New to Medicare," regardless of the effective date.
- You'll be paid the full CMS New rate for a beneficiary making an "Unlike Plan" change when the effective date is January 1st.
- You'll be paid a prorated CMS New rate for a beneficiary making an "Unlike Plan" change when the effective date is February 1st or later.



### **Compensation – General Information**

Samples of how commissions would pay based on New to Medicare vs Unlike Plan Changes as an AG4 contract.

						•			
Prior plan type	Current plan type	Unlike plan change	Compensation report indicator	Rate paid after true up	Effective date	Number of months paid	First Year Commission	Amount Due	True Up Amount Paid
None	MAPD	No	CMS True-Up	CMS New	01-Jan	12	\$ 300.00	\$ 600.00	\$ 300.00
None	MAPD	No	CMS True-Up	CMS New	01-Feb	12	\$ 300.00	\$ 600.00	\$ 300.00
None	PDP	No	CMS True-Up	CMS New	01-Mar	12	\$ 40.00	\$ 80.00	\$ 40.00
None	PDP	No	CMS True-Up	CMS New	01-Apr	12	\$ 40.00	\$ 80.00	\$ 40.00

#### New to Medicare - Not Prorated Effective date doesn't change the rate

#### Unlike Plan Change – Prorated Effective date changes rate (Rate / 12 \* #of months)

Prior plan type	Current plan type	Unlike plan change	Compensation report indicator	Rate paid after true up	Effective date	Number of months paid	First Com	Year mission	An Du	iount e	Tri An Pa	ue Up nount id
PDP	MAPD	Yes	PRONEW	CMS New	01-Jan	12	\$	300.00	\$	600.00	\$	300.00
MAPD	PDP	Yes	PRONEW	CMS New	01-Feb	11	\$	40.00	\$	80.00	\$	40.00
PDP	MAPD	Yes	PRONEW	CMS New	01-Mar	10	\$	250.00	\$	500.00	\$	250.00
MAPD	PDP	Yes	PRONEW	CMS New	01-Apr	9	\$	34.00	\$	69.00	\$	34.00



# **Reports: Compensation Statements**

Clicking on Compensation in the left-hand gray menu will take you to the Compensation Services page. From here you can access compensation information (additional information than what is included in the Compensation tab on the Individual Medicare homepage), included but not limited to:

- Actual Statements for each payment including the VBE.
- Request a change to your EFT information.

Home	Student Health	Small Group	Middle Market	National, PEO, P&L	Group Medicare	Individual Medicare	Joint Ventures
		Producer Worl	d Home \ Individual N	ledicare			
•a	etna	Indivi	dual Mee	licare			
Products	; <del>•</del>	Sign up	for training o	on 2021			
Find the	right plan	plans in	your market	t, and more			AP.S
Quote / I	Renewal	1988 (1922 - 19 <u>8</u>		980.48 V/16 16		10 0 C	
Enrollme	ent / Billing	You'll need	to attend product tr	aining for all			
Forms		markets you	N				
Tools & a	apps	(	13		_	1-21	
Compens	sation	Sign u	IP				
Book of I	business						
Medicar	e reports						into a
License a	and appointment						
Manage	personal/	Plans F	Requirements to s	ell Learn Share	Network Enr	oll Reports Com	pensation



Compensation Statements will show you the exact statement for the date paid.

It will include your Aetna MAPD/PDP commissions and renewals as well as any VBE payments you receive.

If you sell commercial products, they may also be included.



	Producer World Home \ Compensation Services						
Paetna	Compensation Services						
Products 👻	We are aware that timely and accurate delivery of payment is of utmost importance to our external brokers						
Find the right plan	and partners. Our compensation statements and Producer Agreement should have most, if not all, of the						
Quote / Renewal	answers you may have. If there are any questions or concerns related to compensation, we are here to						
Enrollment / Billing	support you. Our compensation staff is fully operational and ready to assist Monday - Friday, 8:00a.m 4:30p m EST_Please call 800-622-3435 or email brokercomm@aetna.com with your inquiry. Thank you for						
Forms	your continued partnership with Aetna and we look forward to hearing from you.						
Tools & apps							
Compensation	Google Chrome or Mozilla Firefox browsers are required to download statements.						
Book of business							
Medicare reports	Statements Commissions EFT & Forms Help Contacts						
License and appointment							
Manage personal/	Statements						
Manage access for others	Individual producers and firm associates may view compensation statements online. (Statements do not include Individual dental and Senior Medicare Supplement. )						
ind a provider							
Find a medication	Compensation statements						
Compliance							
Contact us / Help							



Compensation Statements						
You can access your statements for the past 12 months. Just select a statement date for the location you wish to see.						
Select producer/firm	Agent	~]				
Producer/Firm name						
Taxpayer ID	*****					
Filter location		Direct deposit     Proder compensation statements				
Location		Statement date				
Location 1:		2022-11-10 🗸 💿				
Location 2:		2022-11-10 🗸 💿				

#### Individual Agents

Select the date of the compensation statement you wish to view and click the arrow to open the report.

#### Agency Principals and Designees

Agency Principals are automatically granted access to the agency's compensation data.

Use the drop-down menu to select the desired agency, then select the date of the compensation statement and click the arrow to view.





When you view your statement, you can use the blue navigation bar at top.

- First, Prev, Next, Last and Goto allow you to navigate through page numbers.
- You can see total number of pages and current page.
- Use Download to download a PDF copy of the statement.
- Use Excel to download a copy into Excel format for easier sorting and filtering.

Each statement is broken into two section the Summary and Detailed sections.

- Summary shows you the payment amount on this check.
- Detailed shows you how that amount was determined.

♥aetna"	Same an					Date: January 26, 202 Page 2 of 1
		For inquiries p	olease call 800-622-3435 commission inquiries pli	or email BrokerC	comm@Aetna.com -9301 or email brokersupport	i@aetna com
		Comper	sation Summary			
Customer Name	Base Compensation	Incentive Compensation	Lump Sum Payment	Total	Tax Withholding	Net Compensati
And in case of the local division of the loc						
_					_	_
Net Check/EFT Amount						
		1.00 - 20-00 K	10.00 March 10.00			
		Detaile	d Compensation		Davoo	
Customer Name / Number(s)	Commission Pl	Detaile	d Compensation Premium Subsc	ribers Rate	Payee Share	
Customer Name / Number(s)	Commission Pla	Detaile an	d Compensation Premium Subsc	ribers Rate	Payee Share	<u>Lump St</u> Payme



### **Statement Key**

#### How HRA service payments are identified:

Statements do not reflect member name in the traditional area as these are not base commission payments that flow through normal channels. All HRA service fee payments are tied to a generic member name/ID according to the state in which the actual member is located. A list of the generic member names/IDs being used is in the gray box below.

Aside from generic member names/IDs, each HRA service fee payment will be identified with the following details:

Breakout:

VBE/HRA confirmation number/Broker NPN/Member last name\_first name

Example:

VBE/123456ABC/1231231/Member\_Happy

#### SPECIAL NOTE:

\*The statement description field is limited to 46 characters so there may be instances where member name is partially or completely cut off.

Generic Member Information						
Alabama, Joe - ME0000AL	Florida, Joe - ME0000FL	Louisiana, Jane - ME0000LA	NorthCarolina, Joe - ME0000NC	Ohio, Jane - ME00000H	Texas, Joe - ME0000TX	
Arkansas, Joe - ME0000AR	Georgia, Jane - ME0000GA	Massachusetts, Jane - ME0000MA	NorthDakota, Jane - ME0000ND	Oklahoma, Joe - ME0000OK	Utah, Jane - ME0000UT	
Arizona, Joe - ME0000AZ	Iowa, Jane - ME0000IA	Maryland, Jane - ME0000MD	Nebraska, Jane - ME0000NE	Oregon, Joe - ME0000OR	Virginia, Jane - ME0000VA	
California, Joe - ME0000CA	Idaho, Joe - ME0000ID	Maine, Jane - ME0000ME	NewHampshire, Jane - ME0000NH	Pennsylvania, Jane - ME0000PA	Washington, Joe - ME0000WA	
Colorado, Joe - ME0000CO	Illinois, Jane - ME0000IL	Michigan, Jane - ME0000MI	NewJersey, Joe - ME0000NJ	Rhodelsland, Jane - ME0000RI	Wisconsin, Jane - ME0000WI	
Connecticut, Jane - ME0000CT	Indiana, Jane - ME0000IN	Minnesota, Jane - ME0000MN	NewMexico, Joe - ME0000NM	SouthCarolina, Joe - ME0000SC	WestVirginia, Jane - ME0000WV	
DC, Jane - ME0000DC	Kansas, Joe - ME0000KS	Missouri, Jane - ME0000MO	Nevada, Joe - ME0000NV	SouthDakota, Jane - ME0000SD	Wyoming, Jane - ME0000WY	
Delaware, Jane - ME0000DE	Kentucky, Jane - ME0000KY	Mississippi, Jane - ME0000MS	NewYork, Jane - ME0000NY	Tennessee, Joe - ME0000TN	PartD, Joe - ME000PDP	



Below shows how the HRA payments will show on your statements using the HRA Key. They will be found alphabetically within your clients under the state specific code.



### **EFT/Direct Deposit Information**

Click on the "Direct Deposit"	Select producer/firm Producer/Firm name	Agent ~	
wish to verify or			
update your EFT	Filter location	Direct deposit 🛛 😭 Order compensation statemen	its
information.	Location	Statement date	
	I see all see as	2022 11 10	

Verify the EFT information is accurate and update, as needed.

Changes will impact all lines of business and can take up to two business cycles to take effect. If necessary, payment will occur by paper check until bank information is confirmed.

Direct deposit auth	orization form	
Aetna offers you the opportunity to receive commission payments that are directly deposited into your bank ar and print.	ccount. Taking advantage of our direct deposit feature allows you to immediately view your statements online, download	Agency principals have the capability of selecting any
Note: 1099-NEC forms are generated based on payee TIN, not the bank account in which commissions are dep	agency they are principal of	
Please complete and submit the following information for processing. Information is to be filled out by the pro-	using the drop-down menu	
Select producer/firm name	Agent ~ Agency 1	on the Direct Deposit Authorization form

Tax ID or SSN

Agency 1		
Agency 2		
Agency 3		
Agency 4		



### **Ordering Compensation Statements**

Select producer/firm	Agent	~	Click on the "Order
Producer/Firm name			Compensation
Taxpayer ID	*****		Statements" button if you wish to
Filter location		Direct deposit 🛛 😭 Order compensation statements	receive a statement
Location		Statement date	on Producer World.

Compensation Statements remain on Producer World for one calendar year. In cases where a statement is needed, but no longer available on Producer World, a request can be submitted.

Agency principals have the capability of selecting any agency they are principal of using the drop-down menu on the statement request form.

#### Compensation statement order form

To order copies of Producer compensation statements, simply fill in the fields below and click the submit button. Your statement(s) will be mailed to the you within 3 - 4 business days.

Select producer/firm name	Agent		
Enter your telephone number	Agency 1		
Verify your email address	Agency 2 Agency 3 Agency 4		
Enter the statement date(s) you wish to receive			

Location	Select/Deselect All
Location 1:	
Location 2:	
ow 25 v entries	Previous 1 Next



# **Generate Reports**

## **Generating Individual Medicare Reports**

Individual Medicare Reports can be accessed under the Reports tab or on the Quick Links menu.

Quick links:	Select an item	~
ments to sell L	Select an item > 2024 Certification > 2023 Producer Guide > Enrollment kits (NPN is login and password) > Enrol	omp
sell our Individua	<ul> <li>&gt; Onboarding: manage downline cases</li> <li>&gt; Onboarding: complete your case</li> <li>&gt; Provider search</li> </ul>	
	Reports: member apps, book of business, commission     SilverScript Agent Portal     Verify your ready-to-sell status	

Additional resources and summaries of each report are available on the Reports tab home screen, including

- Enrollment Termination Codes
- Member Search tutorial
- RTS Map tool link

You can access membership and commissions reports through the Access Reporting button.

> Help with reporting topics can be found by clicking the Reporting Help button.

Plans Requirements to sell Learn Share Network Enroll Reports Compensation Reports Access reporting Reporting help If you need help retrieving Medicare commission data, contact Aetna Medicare Broker Services at 1-866-714-9301 or email us at brokersupport@aetna.com or use our Contact us form If you need access to your firm's reports, please contact the compensation designee within your firm. If you are the compensation designee and you need help getting your employees access, visit manage access for others. You may also contact us. We offer the following reports for your Individual Medicare business: Commission reports - Access monthly commission data for your Aetna Individual Medicare payments in a detailed or summary report. · Member application search - Search by member name or the Medicare, member, or application ID to view information or commission detail for an individual member View member application search tutorial View member commission search tutorial Pending Application Report - View applications being processed or those that were denied. Applications appear on the Book of Business Report after they're approved. · Medicare Book of Business Report - View individuals enrolled in an Aetna Medicare plan and those who terminated their policy in the past calendar year. Enrollment termination codes · Ready-to-sell tool - View your current ready-to-sell status by state, product, and selling year. Agency status is also available to those who manage the agency. Licensing Report - View your license status or that of downline producers if you manage an agency. Note: You may view additional license, appointment, certification, and other detail in the license and appointment area available from the Home page. Access the SilverScript Agent Portal to retrieve SilverScript prescription drug reports and more. Read more about commission reports and statements in the Compensation area

## **Generating Individual Medicare Reports**



Vaetna

License status report

### **Medicare Member Search**

#### Enrollment reports & search tool

Search for member application

Pending applications report

Medicare book of business report

Click "Search for a member application" to find details about a specific member.

Search by name, MBI, member ID, or application ID. Results provide member status, demographic information, plan information, and Writing Agent. For AG4 and above, the last six months of commissions paid on the member can be found on the "Commission Details" tab.

APPLICATION ID			MEDICARE ID			MEMBER ID		I	MEMBER NAME			
Enter Application ID		(OR)	Enter Medicare ID		(OR)	Enter Member ID	(O	DR)				
				PRODUCER								
												View Individual Medicare reports
						Back	Search Clea	ar				
												Filter:
Member ID 🛔	Legacy Member I	D	<b>♦</b> Medicare ID	+ Application ID	ŧ	Member First Name	Member Last Name		Member Status	<b>♦</b> Effectiv	e Date	🔹 Member State 🛔
					İ							
Show 5 🗸 entries				Showing 1 to 1 of 1 entri	ies							Previous 1 Next
Member Information	Commission	Details										
						MEMBER STATUS: ACT	IVE					



## **Pending Applications Report and Book of Business**



Book of Business Report show demographic and plan information for active members, as well as any member terminated within the last 12 months.

Information on the Book of Business includes:

- Member ID number
- Medicare Number
- Name
- Date of Birth
- Address
- Phone number

- Application signed date
- Application submission date
- Coverage effective date
- Member status
- Termination date
- Termination reason code

- Plan Name
- Plan Effective date
- Writing Agent NPN
- Writing Agent name
- Plan Contract number
- Plan PBP code



# **Exporting Pending Applications Report and Book of Business**

Pending Application and Book of Business reports open utilize a format called Crystal Reports.

To manipulate data, it is highly recommended to export the information into a Microsoft Excel Document.

- 1. Click the "Export this report" button.
- 2. Click on the drop-down menu to select the format.
- Select "Microsoft Excel Workbook Data-only"
- 4. Click Export



The information will open in an Excel file to be filtered, sorted, or otherwise personalized to your specifications.

⊿D	E	F		G H		Ĵ	K	L	M	N	0	P
1 First Name	Mid Initial	Last Name	City	Sta	te Zip Code	e App Sign Date	App Rec Date	Cov Eff Date	Mbr Status	Term Date	Term Rsn Code	Plan Name
4												



### **Commission Monthly Reports**

### Commission reports are available for the last 12 months.

#### Commission monthly reports

Commissions from the Individual Medicare commission statements emailed on Thursday are reflected on the Commission Payee Detail Report the following Monday. You may download the report in Microsoft Excel Data-only format and then filter by the current Check Date.

Vaetna

September 2023 August 2023 July 2023 June 2023 May 2023 April 2023 March 2023 February 2023 January 2023 December 2022 November 2022 October 2022 September 2022 Your report is ready! Click OK to open the Excel Your download will begin automatically, please check your folder. file or open the report from your recent downloads. OK

Click on the corresponding month for the requested report.

The information for commission paid to date for that month will download in Microsoft Excel format.

### **Commission Report Fields**

Commission Report information was updated 09/22/2023. Below are the changes in available

fields and field names.

### **Added Fields**

- CMS New Indicator
- Member Signature Date
- 1099 Year

### **Removed Fields**

- × ATN
- × Reg
- × Downline Amount

Updated Field Names
Payment Date
Medicare Number
Member ID
Legacy Member ID
Member Name
Member State
Sales Event
Product
Market
Plan ID
Additional Payment Field
Coverage Period
Effective Date
Term Date
Writing Agent NPN
Writing Agent Level
Writing Agent Name
Payee ID
Payee Level
Payee Name
Payee Amount
CMS New
Member Sig Dt
1099 Year

### **Renamed Fields**

- All Receiving Agent fields are now Payee
- Individual Medicare Market field is now Market
- Other Description field is now Additional Payment



### **Requirements to Sell Reports**



Ready to sell?

License status report

Click "Ready to Sell?" to access your Ready to Sell map tool. This allows you to verify your RTS status in each state.

<u>Click here</u> for more information about the RTS map tool.

The License Status Report will provide information on each state license on file with Aetna Individual Medicare. This report provides the license status and expiration date.



# **Provider Network**

### **Provider Network Search**

You can search for in-network providers, dentists or pharmacies by accessing the Network tab on the Individual Medicare home page of Producer world. There are separate links for Aetna and Allina Health. Selecting any of the links will take you to our aetnamedicare.com website. You can either search as a guest or if you are with an Aetna member, they can login to search.

Plans Requirements to sell Learn Share <b>Network</b> Enroll Reports Con	npensation	
Networks Find in-network providers • 2022 Provider directory PDFs • Downloadable provider files (for select states) • <u>Find providers online, Aetna</u> • Find providers online, Allina Health   Aetna	Find doctors an	d pharmacies
<ul> <li>Find in-network pharmacies</li> <li>Find pharmacies online, Aetna</li> <li>Find pharmacies online, Allina Health   Aetna</li> </ul>	Guest Search for providers or pharmacies based on your location.	Members Log in to search for providers covered by your current plan.
		Considering a new plan? See if your provider is within your network >



### **Provider Network Search - Medical**

When you choose Guest, you will be directed to key the zip code for the client.





If you choose "Dental," you will be redirected to our Aetna Medicare Dental PPO Search screen. All our plans use this network. The next screen will let you search for the provider directly or do a random search by physician type.

If you are unable to locate a physician, you may reach out to your Sales Account Associate or BSD to verify as many physicians choose to not print in the directory or may not be accepting new patients yet still be in our network.

Already a member?	Login to secure site		Searching by: Ae Prime (HMO D-SN	etna Medicare Assure Premier P) - H4711-012   <u>Change Plan</u>
What do you want t	to search for near 80	012 (Aurora, CO)?	Change location »	
Q				
or Find what you nee	vsician, Dermatologists, Periodontis	G		
Medical Doctors & Specialists >	Hospitals & Facilities >	Urgent Care >	Walk-In Clinics >	Pharmacy >
Primary care physicians (PCPs), pediatricians, cardiologists, OB/GYNs, others	Hospitals, physical therapy centers, nursing facilities, dialysis centers, others	A type of facility focused on the delivery of urgent care outside of an emergency room	A facility that accepts patients on a walk-in basis and with no appointment required	Search for pharmacies by location



### **Provider Network Search - Dental**

15 miles

Search Radius:

Search 🚽

			Clear All Filters	
Medicare plans you purchas	e yourself	Continue to find care	Gender Female (970) Male (1505)	White, Jaime Gateway Dental 1076 S Sable Blvd Aurora, CO 80012
Medicare Advantage with Prescription Drug plan ? 6 Plans	Medicare Advantage plan           I           Plan	Skip plan selection ? Medicare Dental Search 2022	Accepting New Patients Yes (2472) Specialty General Dentist (1610)	Specialty: General Dentist Phone: (303) 369-5517 Distance in Miles: 0.51 NPI ID: 1699773697 Office: Accessible
HMO  Aetna Medicare Assure Premier This plan has a dental benefit. T Medical OR Aetna Medicare Elite Prime (HM This plan has a dental benefit. T	r Prime (HMO D-SNP) - H4711-01 Fo search for a dental provider ir O Dental 10-POS) - H4711-006	This dental provider directory serves members of Aetna and Allina Health   Aetna Medicare Advantage plans. It's specific for Medicare Advantage members that have dental benefits through the Aetna Dental® PPO network. Not sure if your dental services can be provided by providers in the Aetna Dental PPO network? Check your 2022 Member ID card. Most will include the dental PPO network name on the back of the card. If you do not see a dental network listed, please refer to your Evidence of Coverage (EOC) for more details on what is offered with your plan. You can also call us for help.	Cral Surgeon (213) Coral Surgeon (213) Corthodontist (277) Pedodontist (91) Periodontist (111) Prosthodontist (4) Office Accessible Yes (1953)	Orr, Daegan Comfort Dental Aurora 1050 S Peoria St Aurora, CO 80012 Specialty: General Dentist Phone: (303) 367-2273 Distance in Miles: 0.51 NPI ID: 1780840439 Office: Accessible
To find dental click the Denta button. Key in the Zip	providers, al radio Code or	To find a network dentist or dental specialist, enter: <ul> <li>Your ZIP code OR</li> <li>City and state</li> </ul> <li>You can sort through results by last name or by specialty. Keep in mind that not all providers accept new patients. Some providers may have beer added or removed since this directory was last refreshed.</li> <li>Want to learn more about your dental coverage? Check your plan's Evidence of Coverage.</li> <li>Important Disclaimers for Medicare Members</li>	Language Spanish (1059) French (37) German (10) Amharic (4) Arabic (65) Aramaic (3) Last Name	View Map AI-Shorji, Sulaf Sulaf H. AI-Shorji, DDS 15022 E Mississippi Avenu Aurora, CO 80012 Specialty: General Dentist Phone: (888) 453-4129 Distance in Miles: 0.52 NPI ID: 1558021899 Office: Not Accessible
location and S	earch	ZIP Code 80012 or City State Search Badius: 15 miles	After you sea filter further l name or Spe	arch, you can by Dentist cialty

**♥aetna** 

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## **Provider Network Search - Pharmacy**

You can search for in-network providers by accessing the Network tab on the Individual Medicare home page of Producer world. Like the Provider search, there are separate links for Aetna and Allina Health.





# **Miscellaneous Information**

### **Additional Information**

Where to find other helpful documents &/or information

- **Think Agent:** Individual Medicare > Enroll > Enroll with Think Agent > our virtual sales office app
- Medicare Marketing Studio: Individual Medicare > Share > Sales and Marketing Materials to help you stay compliant
- **AOR Change Information:** Individual Medicare > Compensation > Agent of Record
- Benefits Check-up: Individual Medicare > Learn > Tools to help you market, sell & retain
- Permission-to-contact form or Scope of Appointment (SOA) Form: Individual Medicare > Share
- Notice of Intent-Transfer Release Form & Policy: Individual Medicare > Requirement to sell > Step 2: Contract with us (forms & guidelines)
- **Upload Enrollment Applications:** Individual Medicare > Enroll > Upload an enrollment application
- **OTC Catalog**: Individual Medicare > Share > Educational Items for clients
- Aetna Medicare Broker Manager contact list: Individual Medicare at the bottom of every tab. Use this to find the Broker Manager for any state.







