Individual Medicare Producer World Tour 2023

Contents

Click to jump to any section

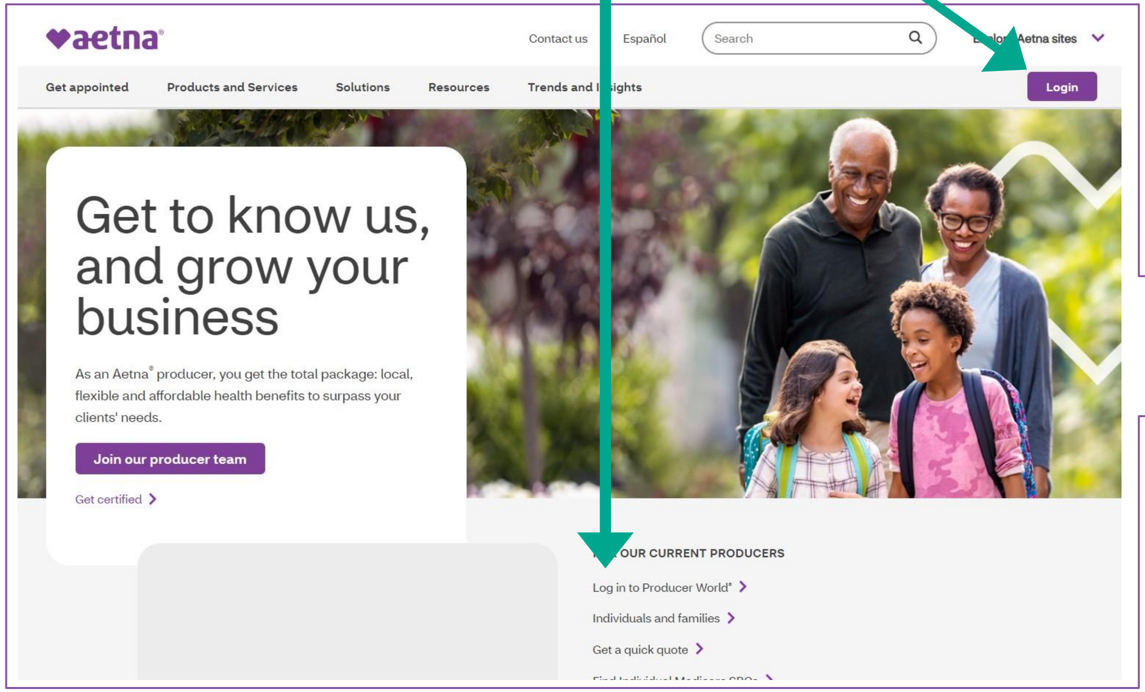
General Navigation

Registration and Login

To get started, you will need to access the Producer World site.

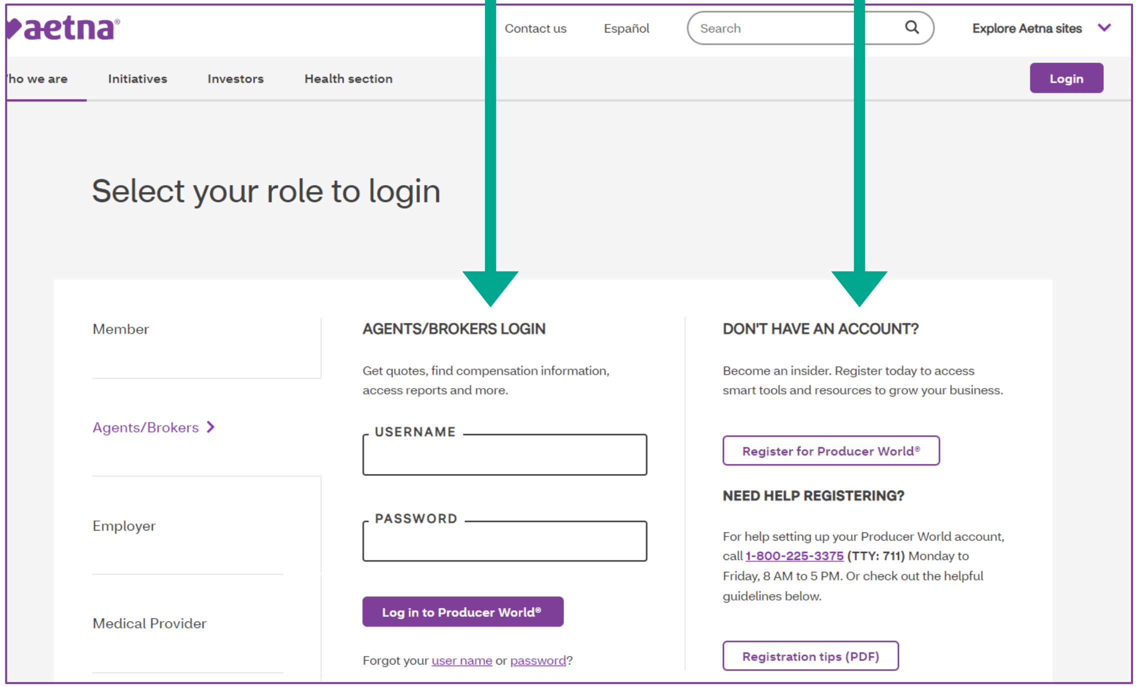
https://www.aetna.com/insurance-producer.html

Click on the purple “Login” button or select the “Log in to Producer World” link.



Returning brokers
Log in with your username and password

New to Producer World?
Select “Register for Producer World”

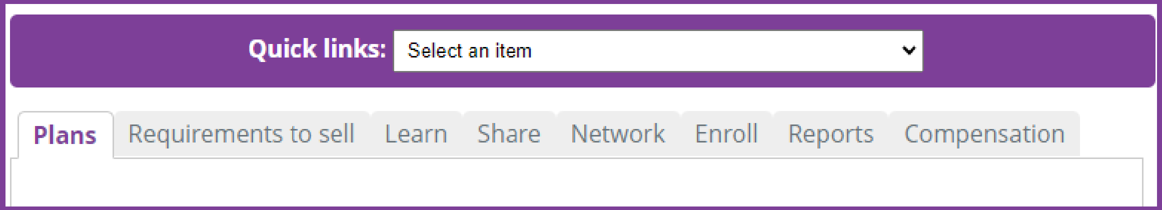


Accessing Individual Medicare

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



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 ***What we offer*** • Plan Guides • First Looks • Plan Tools • SilverScript Portal	**Requirements to Sell** ***RTS and Compliance*** • RTS and requirements • Market Specific Training • Onboarding/Contract Changes • Compliance & Oversight • CMS Marketing Guidelines	**Learn** ***Agent-use only materials*** • Marketing/sales tools • Training Videos/Presentations • Quick Reference Flyers • Guidance for Marketing • Broker Newsletters • Video Podcasts • SEP announcements	**Share** ***Client-use materials*** • MMS Marketing Studio • Enrollment Kits • Sales Presentations • PTC/SOA Forms • Educational items for clients • Member Forms

Network
Where to go for services
• Provider directories in PDF
• Online provider search tools
• Online pharmacy search tools
• Online dentist search tools
	Enroll
	Enrollment info and tools
	• Think Agent Virtual Sales App
	• Enrollment Kits
	• Enrollment Reports
	• Mail or Fax Enrollment
	• Upload Applications
	• Health Risk Assessment (HRA) Information
	• Forms, Guidance & Instructions
	  – SEP Guide
	  – Broker Attestation Form
		Reports
		Sales related reporting
		• Access Reporting
		  – Commissions
		  – Pending Enrollments
		  – Book of Business
		• Reporting Help
		• Reports Information
		• Enrollment Termination Codes
		• Licensing Reports
			Compensation
			Compensation support and AOR
			• Commission Eligibility Requirements
			• Forms, Guidelines & Instructions
			• How and when we pay
			• Reports and Statements
			• Agent of Record Information
			  – Agency acquisition
			  – Agent Death
			  – General Info & Policies
			  – AOR Changes
			  – Upline Mgmt of LOAs

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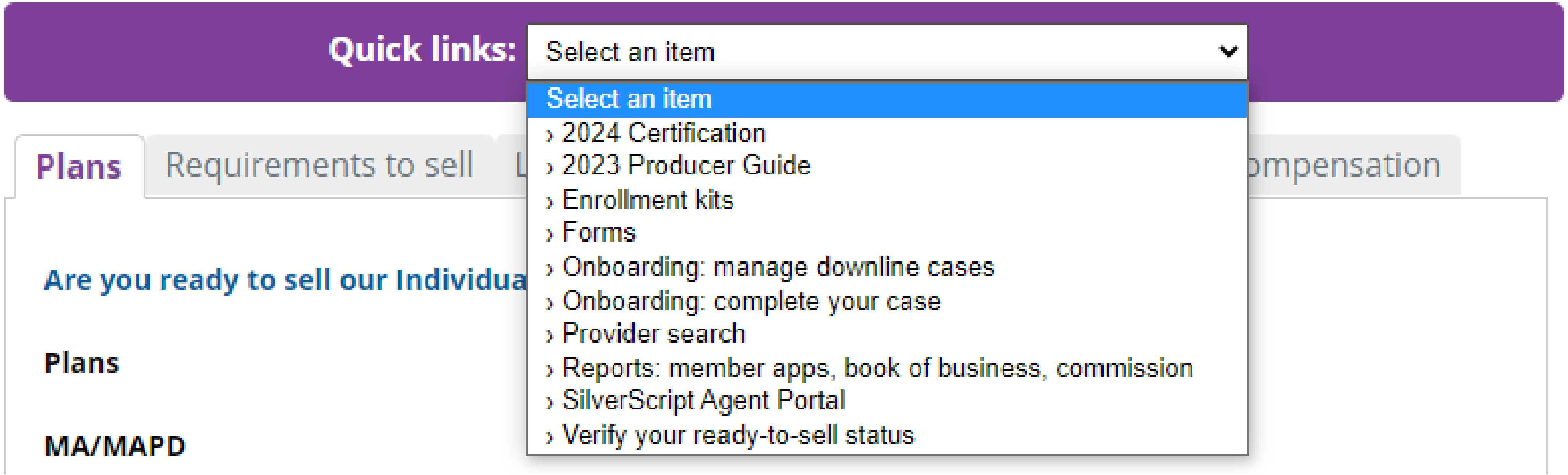
Quick Links Menu

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

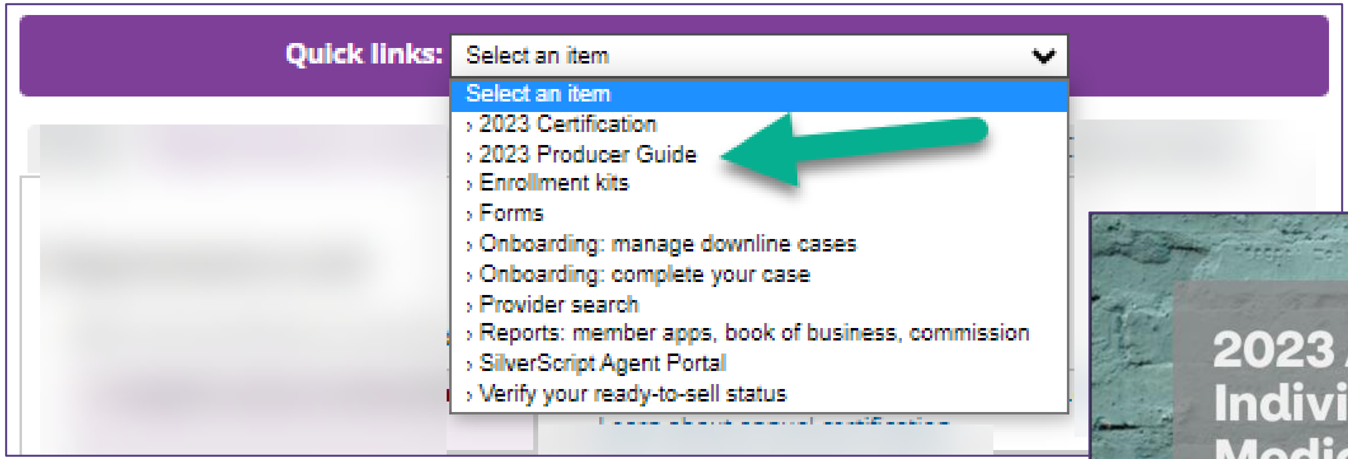


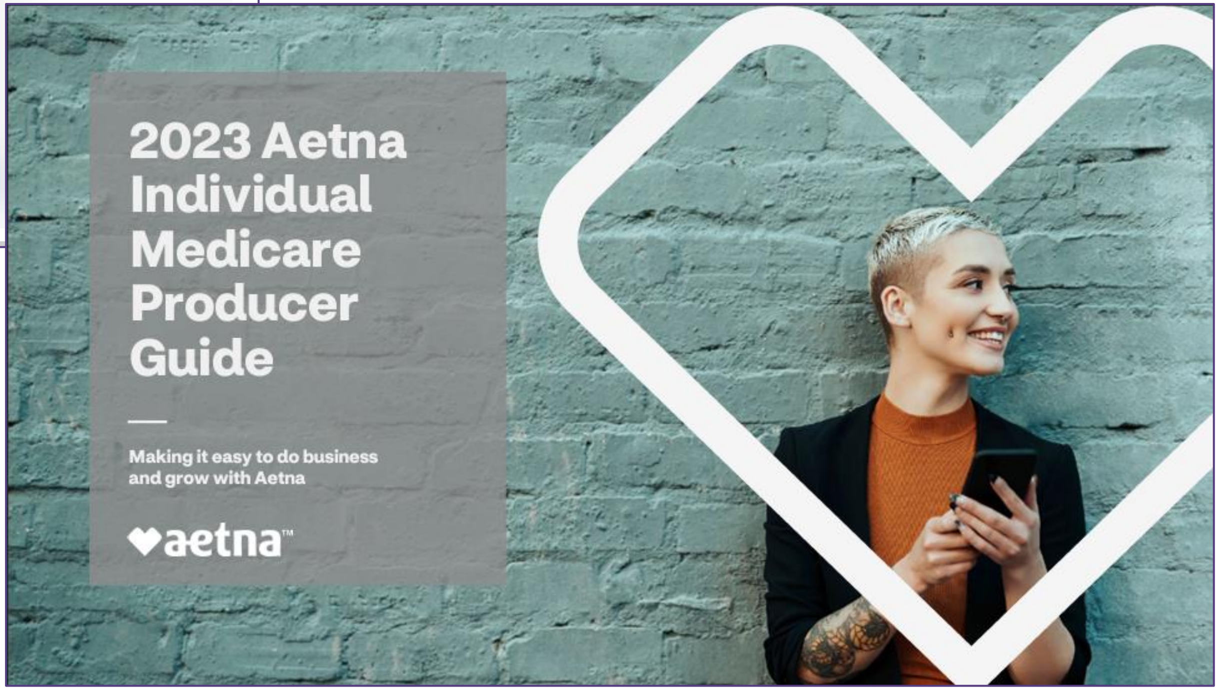
Quick Links choices include links to the certification site, the Broker Ordering Module (BOM) to order enrollment kits, and SilverScript Agent Portal.
It also provides direct access to Individual Medicare reporting for book of business and commission reports and the Onboarding platform for contracting.

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.





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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

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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.

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Contracting and Ready to Sell Status

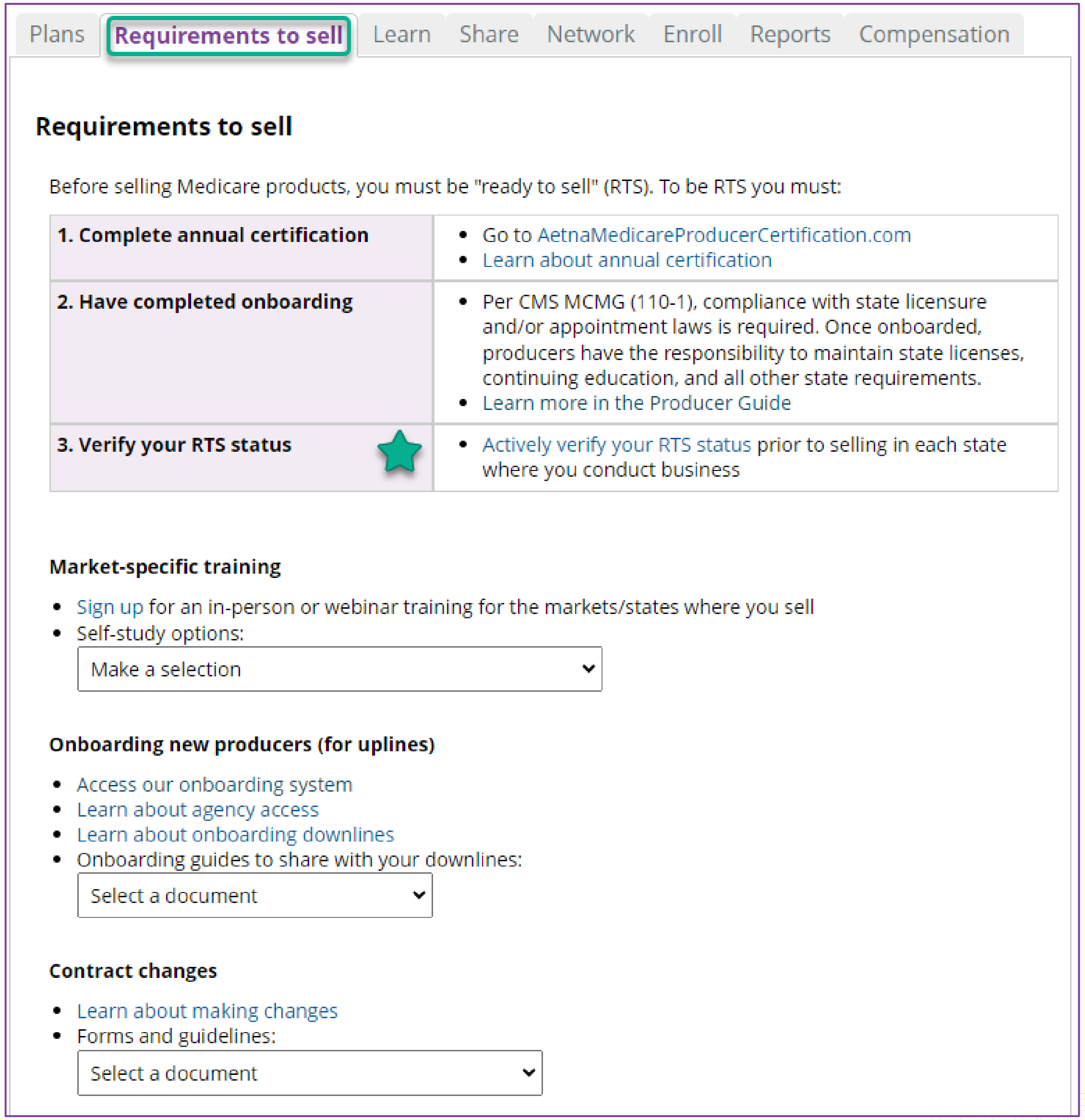
Requirements to Sell

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 self-study options.
- Onboarding new producers (for uplines)
- Contract changes



Plans | Requirements to sell | Learn | Share | Network | Enroll | Reports | Compensation

Requirements to sell

Before selling Medicare products, you must be "ready to sell" (RTS). To be RTS you must:

1. Complete annual certification	• Go to AetnaMedicareProducerCertification.com • Learn about annual certification
2. Have completed onboarding	• Per CMS MCMG (110-1), compliance with state licensure and/or appointment laws is required. Once onboarded, producers have the responsibility to maintain state licenses, continuing education, and all other state requirements. • Learn more in the Producer Guide
3. Verify your RTS status	• Actively verify your RTS status prior to selling in each state where you conduct business

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

Certification

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

Click here to learn more about annual certification

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 AetnaMedicareProducerCertification.com.
- **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 no-cost certification option 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.

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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)

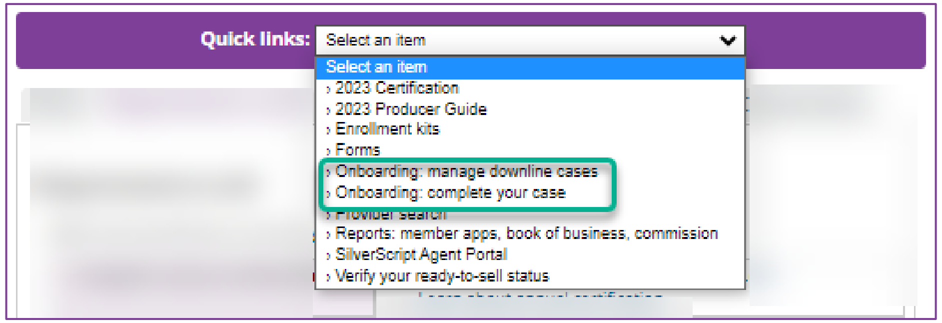
Step 5: Aetna Medicare Broker Services will process your onboarding case

*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

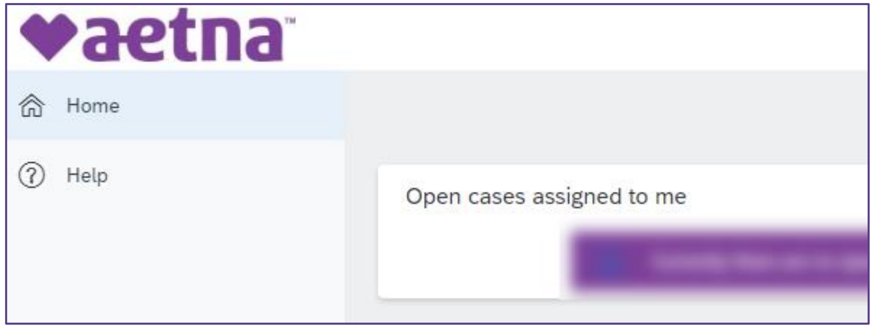
Contracting

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.



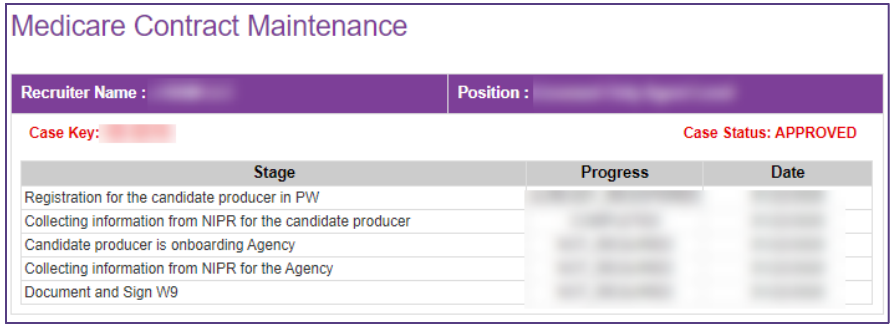
Onboarding: manage downline cases

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



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.



Ready to Sell Map Tool

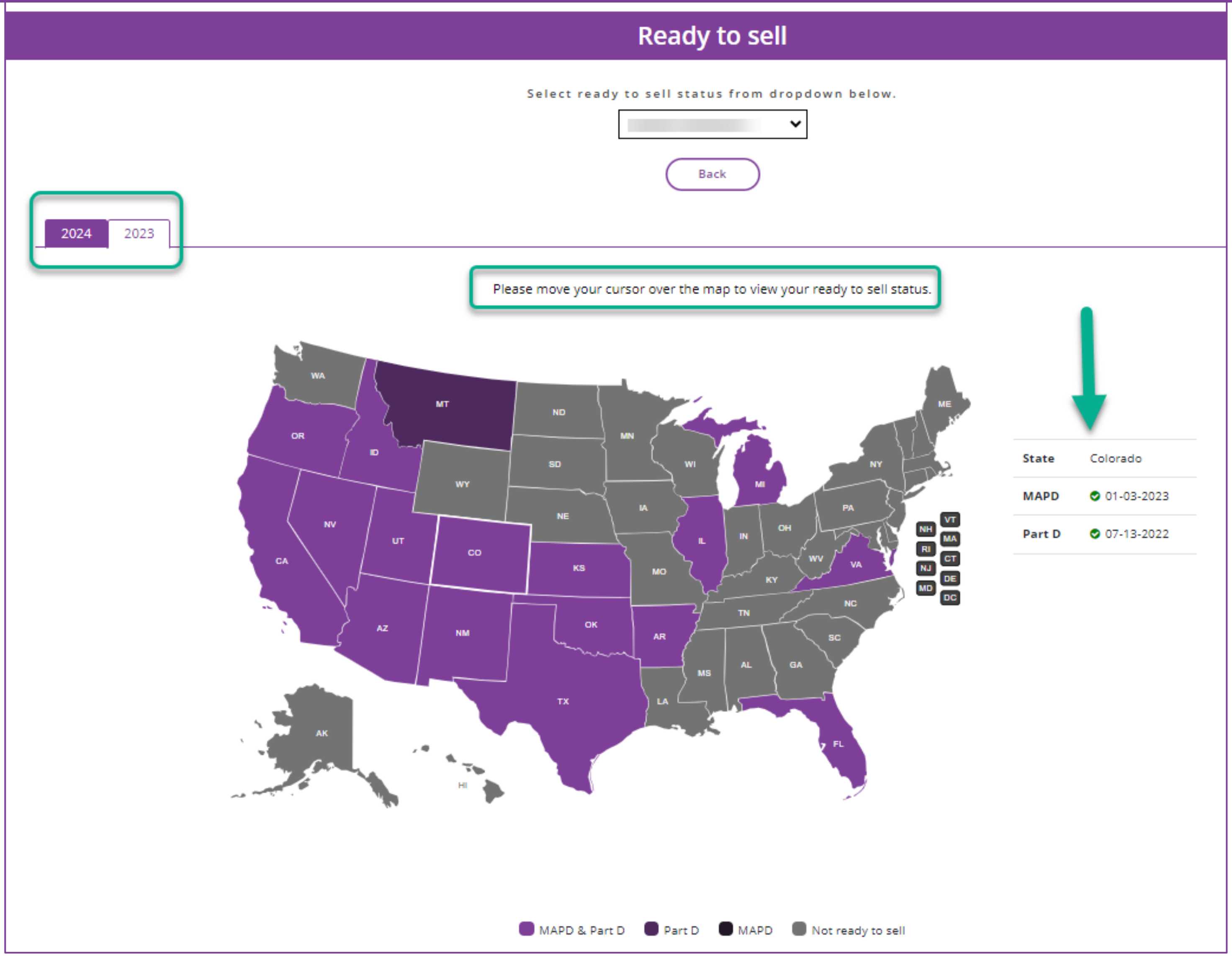
When you click the link to verify your Ready to Sell (RTS) status, you are taken to an interactive map.

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.



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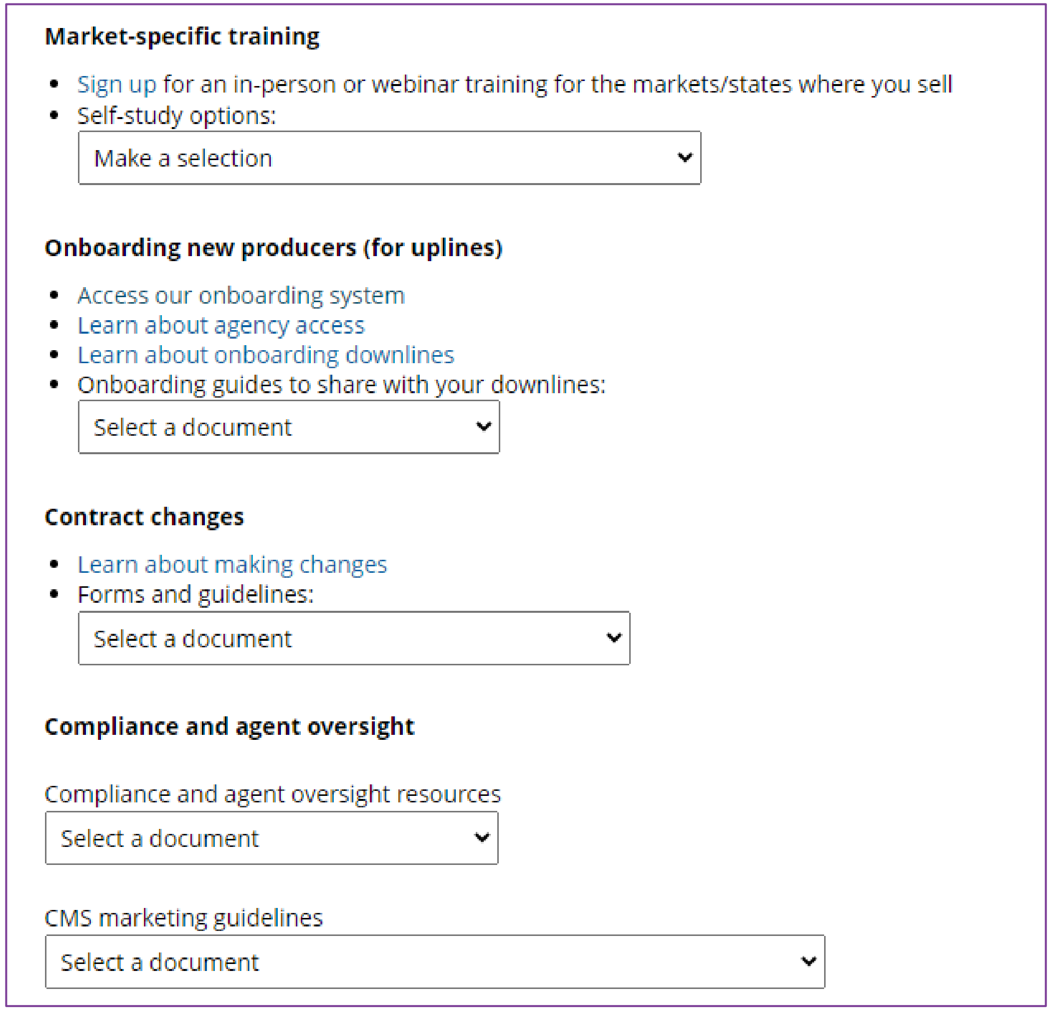
Additional Requirements to Sell Information

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

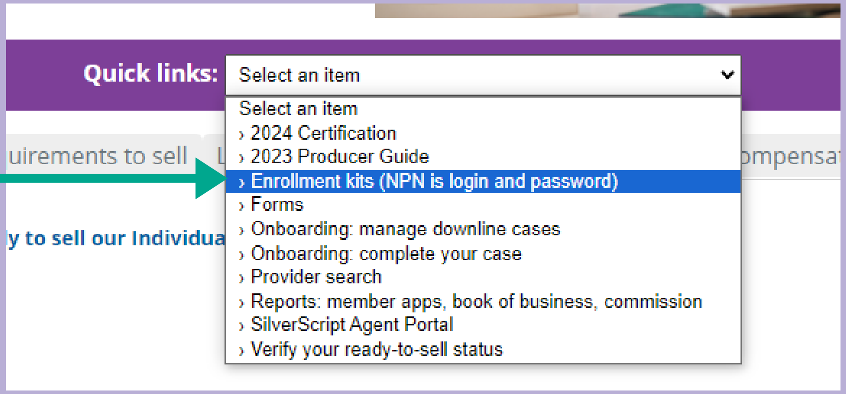


Ordering Aetna MAPD Enrollment Kits

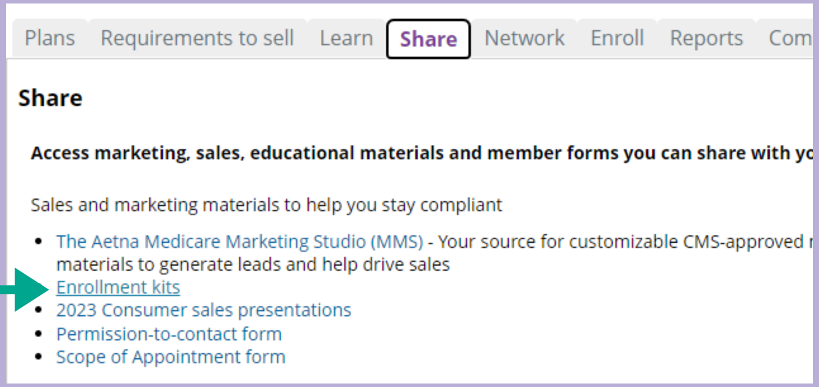
Accessing the Broker Ordering Module (BOM)

There are four ways to access the Broker Ordering Module through Producer World:

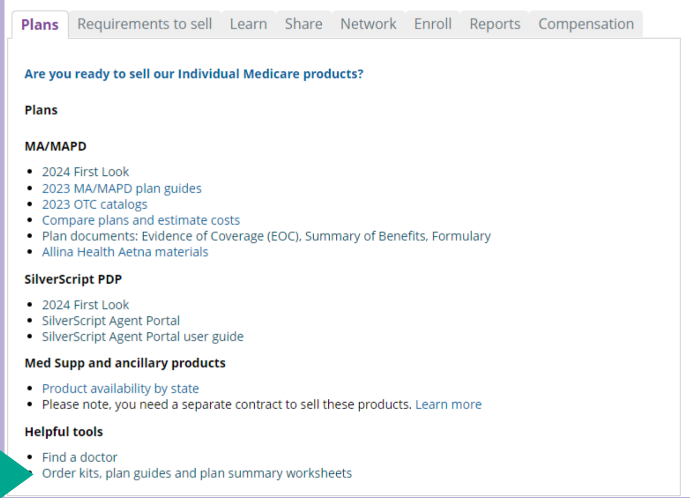
Quick Links



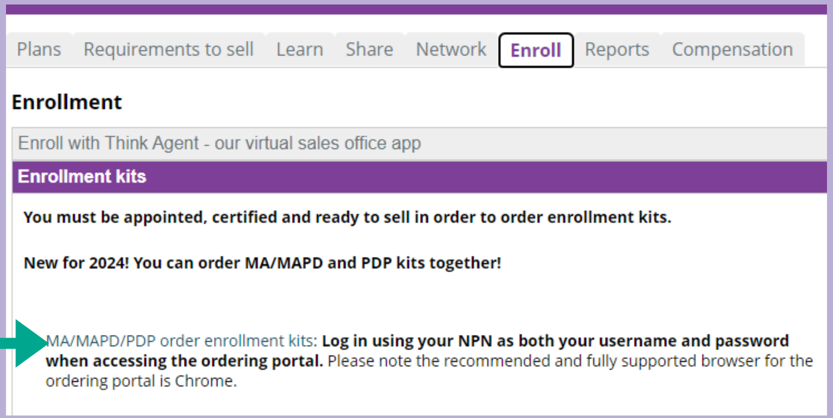
Share Tab



Plans Tab

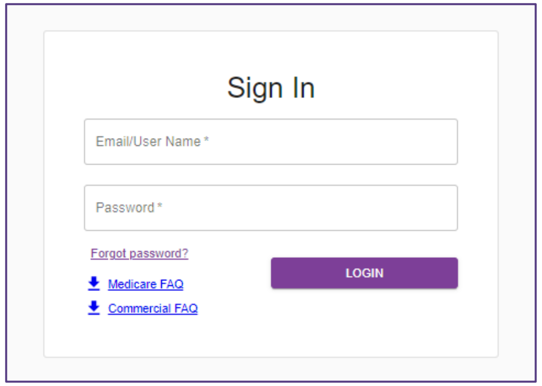


Enroll Tab



Ordering Enrollment Kits on BOM

The username and password for the BOM is the broker's NPN.



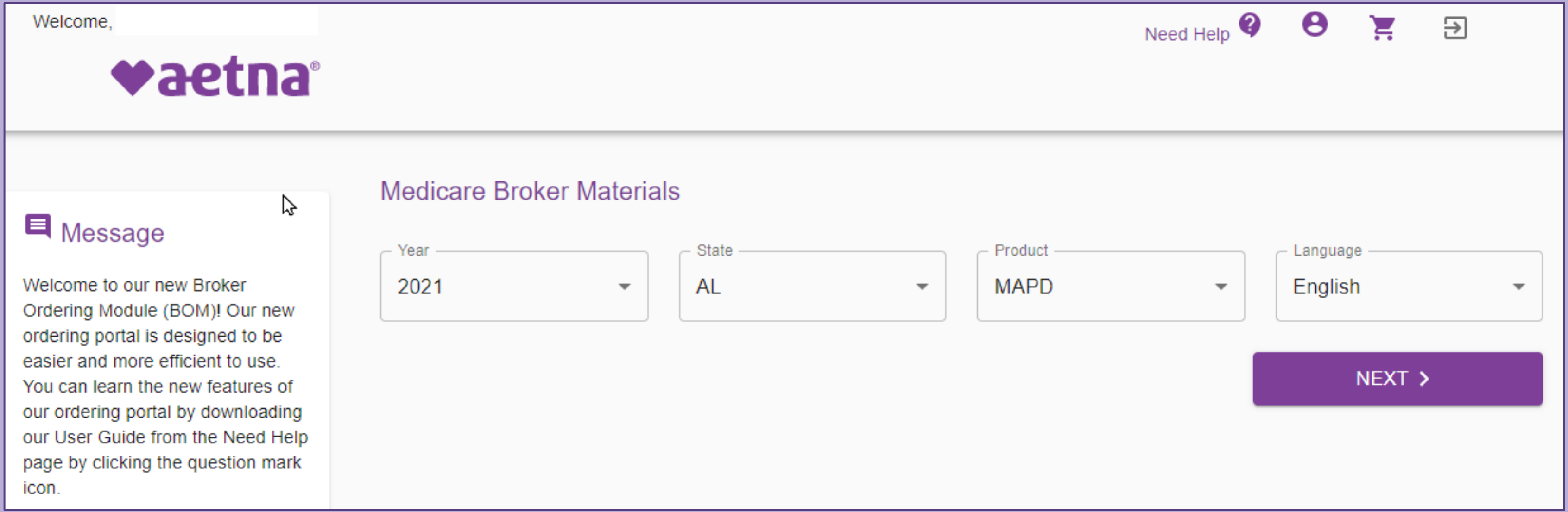
If you cannot log in, you may not be Ready to Sell. Contact your Market Associate or Broker Support for assistance

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 – 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



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

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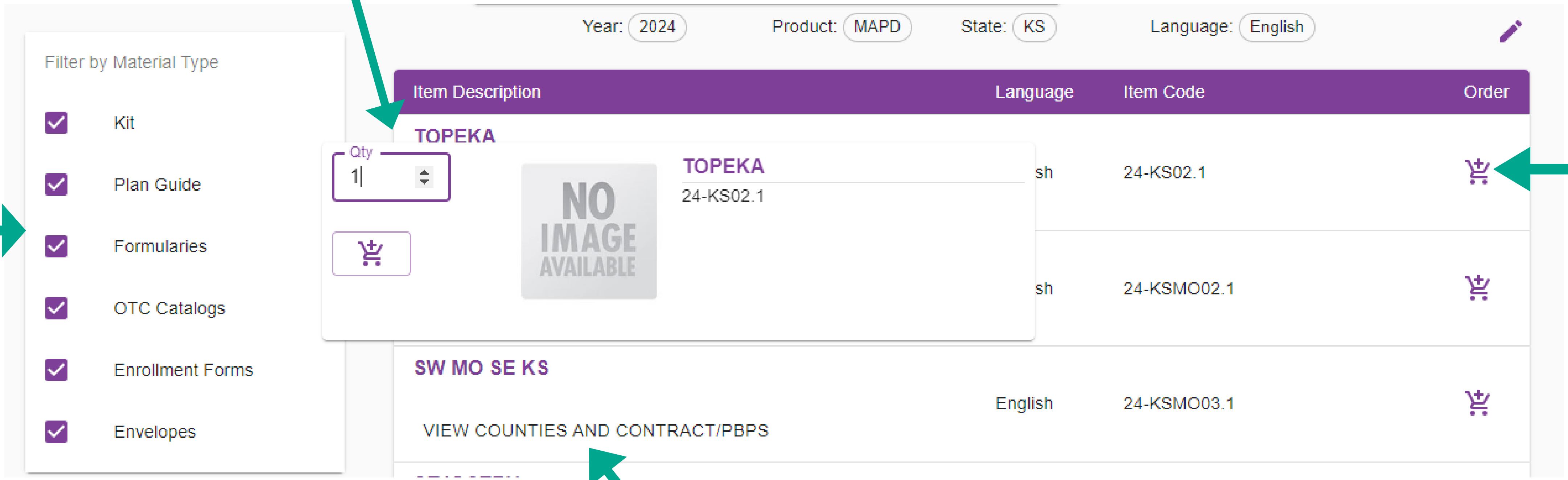
Ordering Enrollment Kits on BOM

Hover over the Item Description to select the quantity and add items to your cart.

Click this icon to add to your cart one kit at a time

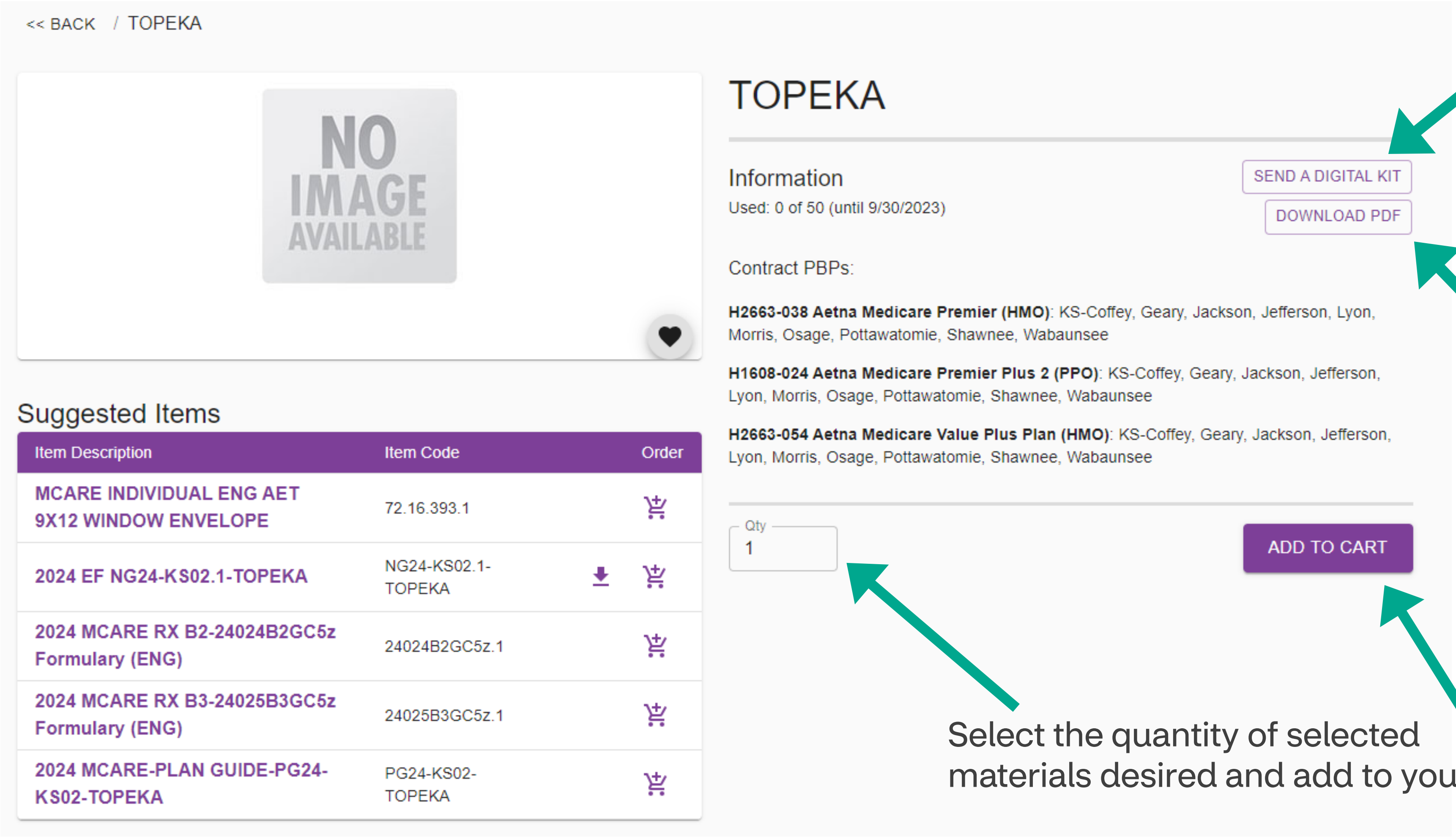


The left side menu provides the ability to filter to only specific types of documents. Check or uncheck boxes depending on the materials desired.

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.



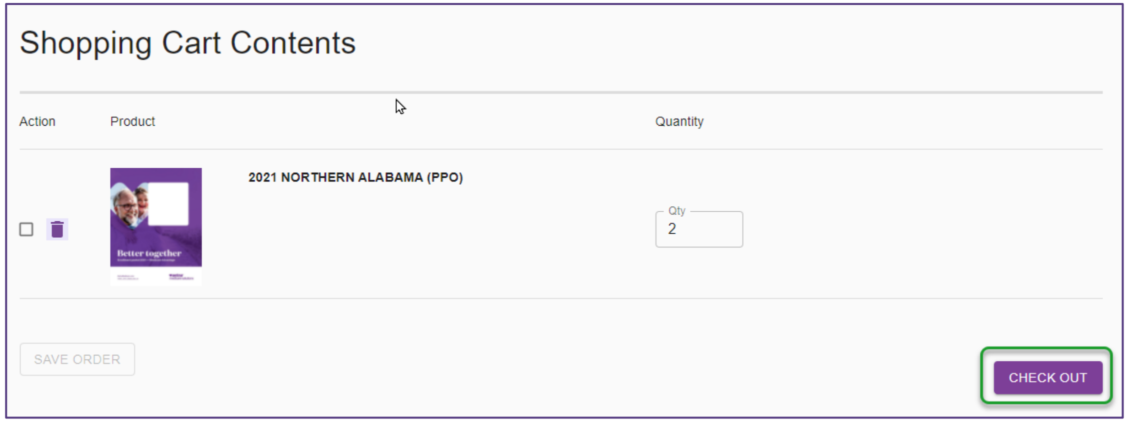
Send a digital kit through Think Agent.

Download a PDF copy of the selected kit to your computer.

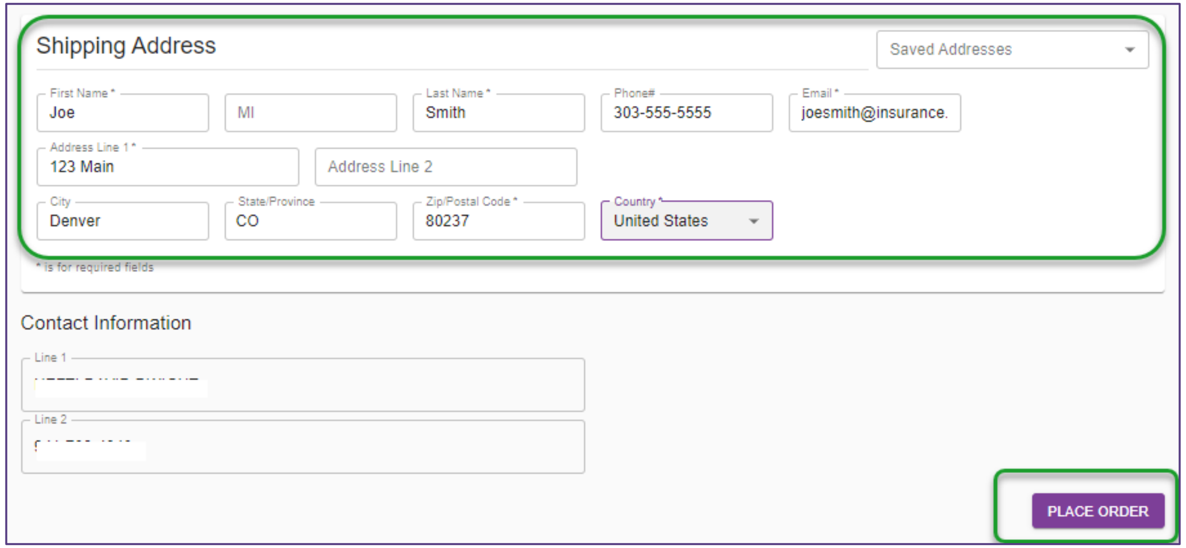
Suggested items that correspond to the selected materials can be added to your cart from this section.

Select the quantity of selected materials desired and add to your cart.

Ordering Enrollment Kits on BOM



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



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

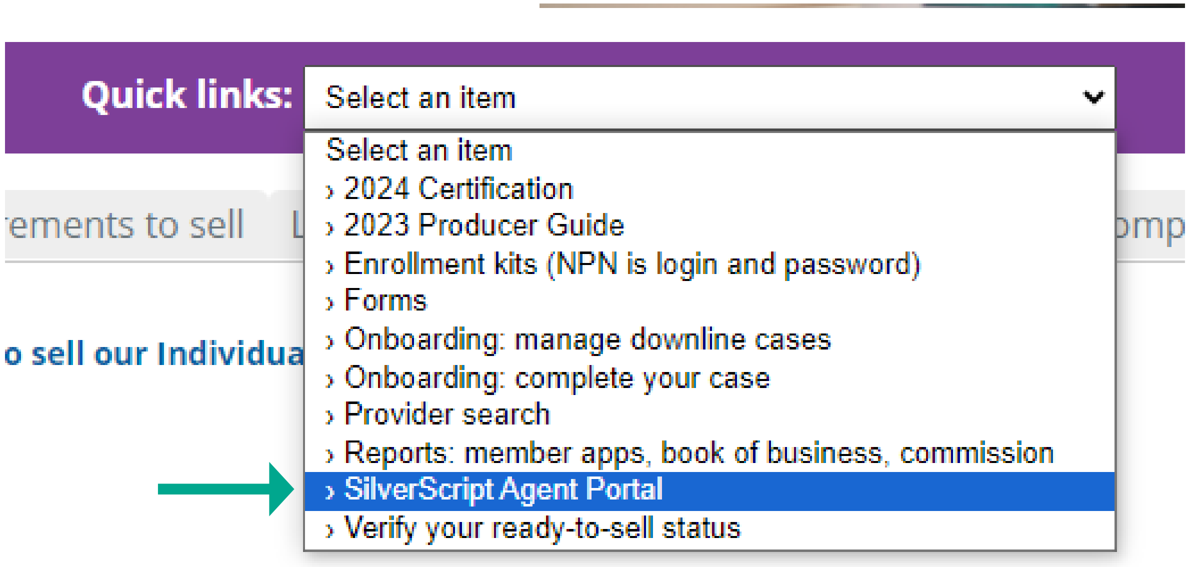
Click “Place Order”.
Failing to click “Place Order” means the order will not be processed and the items will remain in your cart.

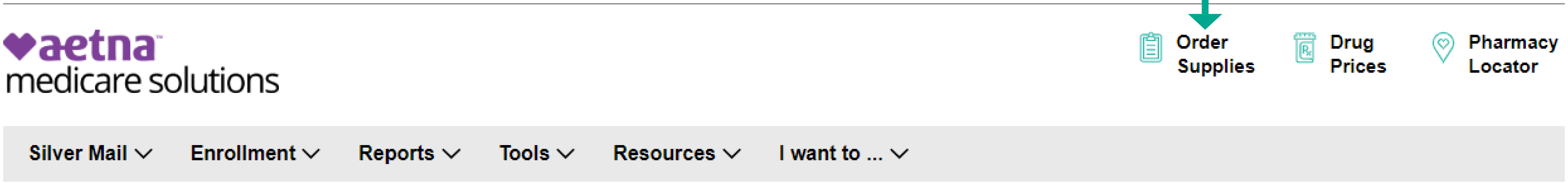
The Order Confirmation page provides the order number, status, delivery address, and lists items ordered. It can be printed by clicking the printer icon.

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

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 *Commission Payee Detail Report* 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

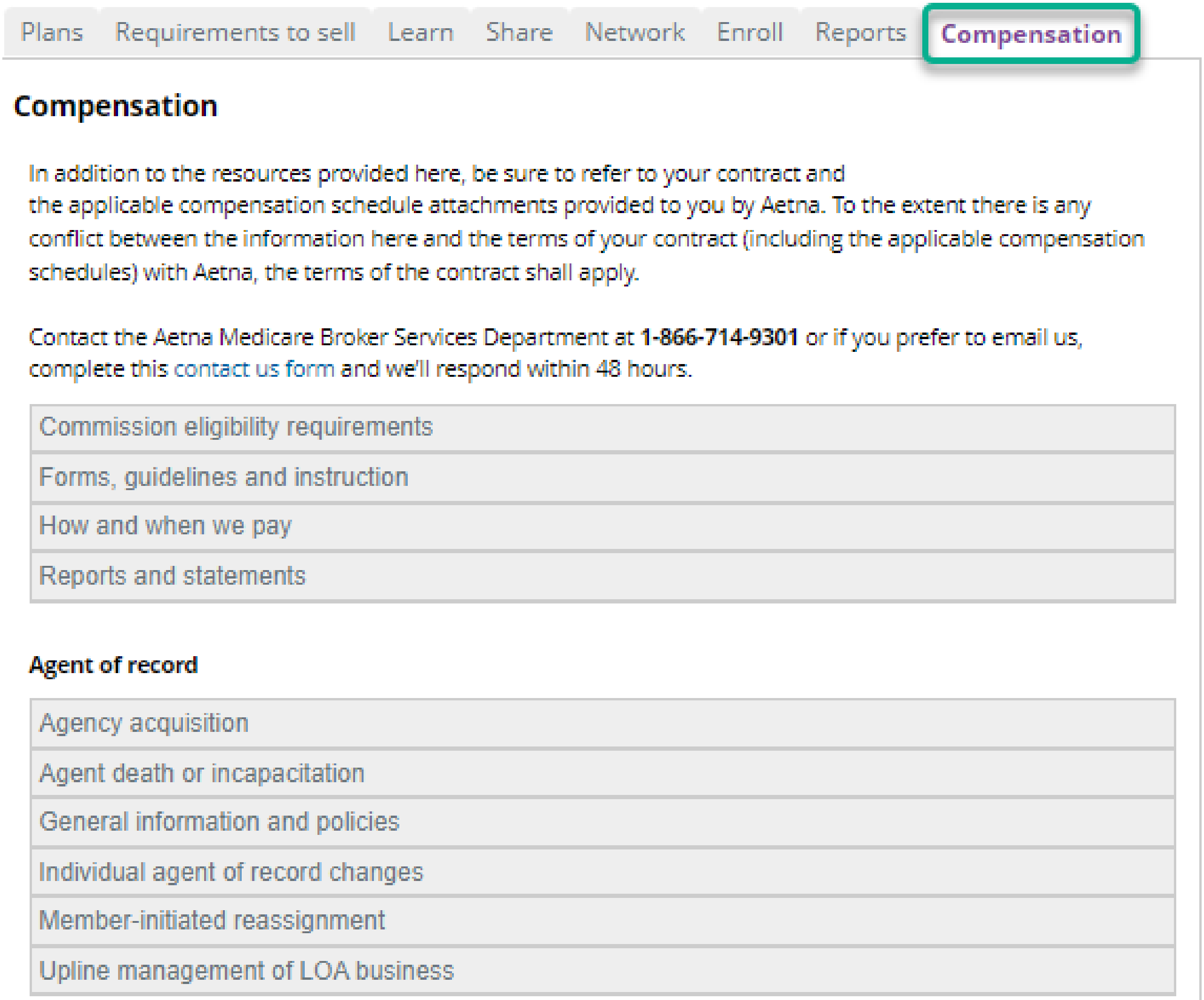
Compensation – General Information

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.



Compensation – General Information

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 not in the Medicare system before the current policy, the first payment is reversed, and the CMS New rate is paid. You're paid the full year amount on new business, regardless of the effective date.

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 prorated amount based on the new effective date, 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.

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

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

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

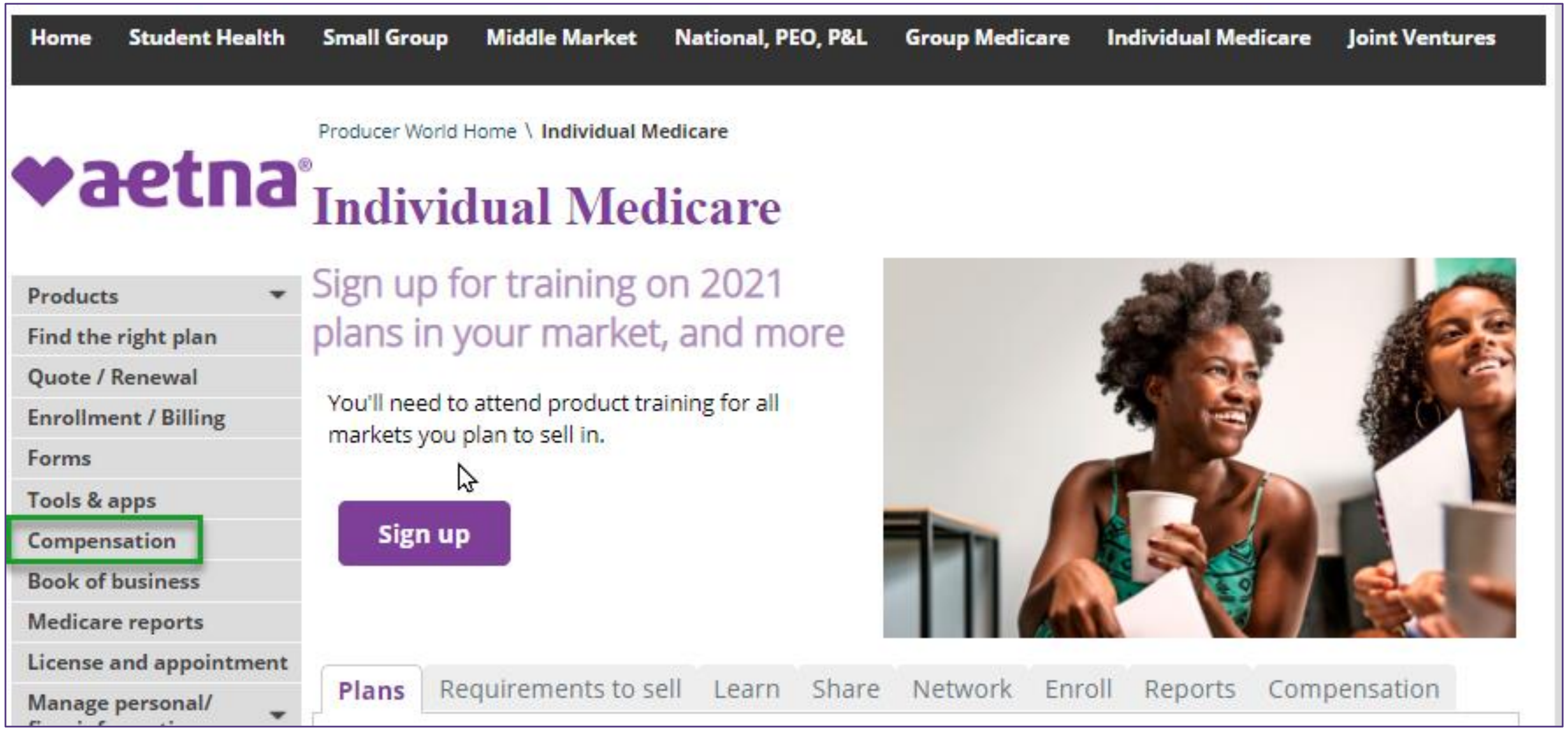
Prior plan type	Current plan type	Unlike plan change	Compensation report indicator	Rate paid after true up	Effective date	Number of months paid	First Year Commission	Amount Due	True Up Amount Paid
PDP	MAPD	Yes	PRONEW	CMS New	01-Jan	12	$ 300.00	$ 600.00	$ 300.00
MAPD	PDP	Yes	PRONEW	CMS New	01-Feb	11	$ 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

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.



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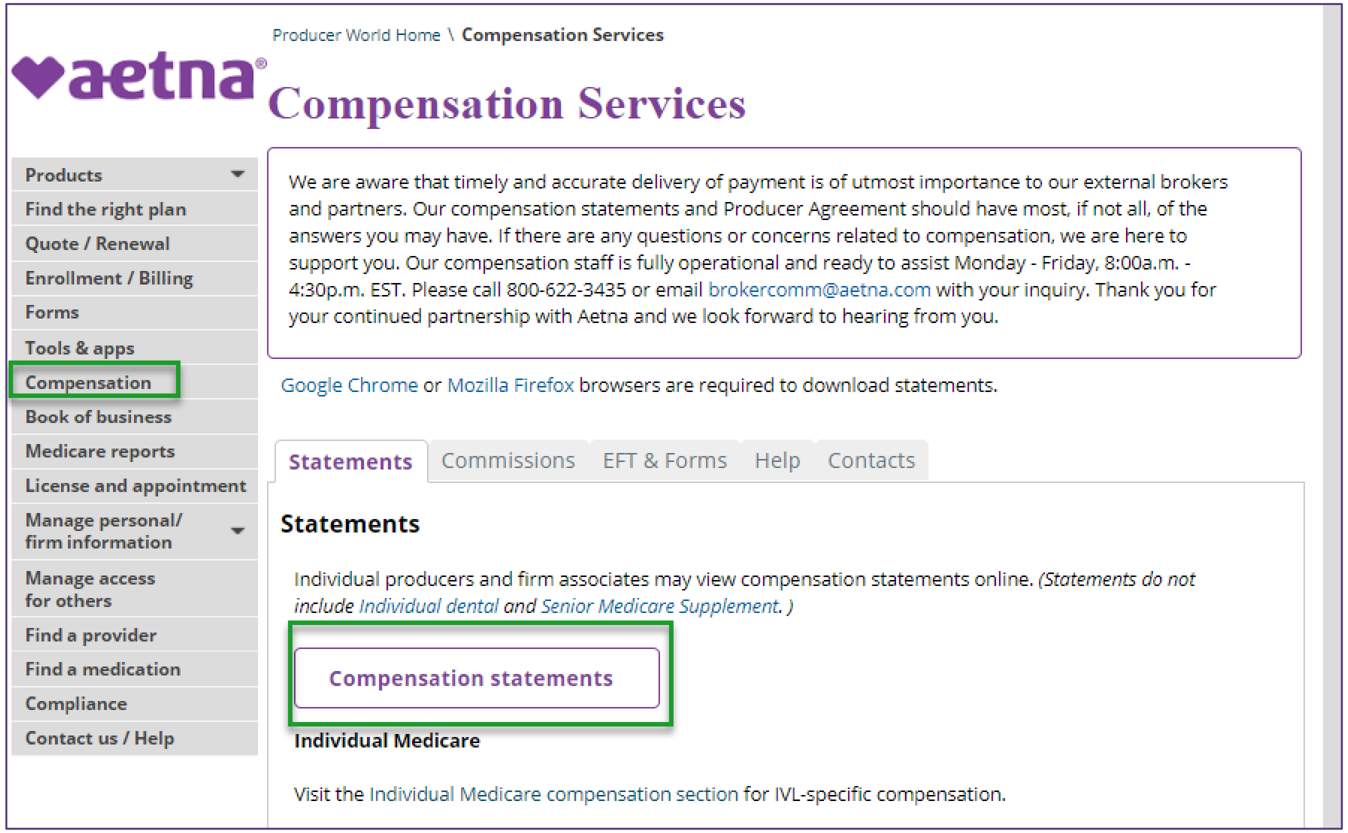
Compensation Statements

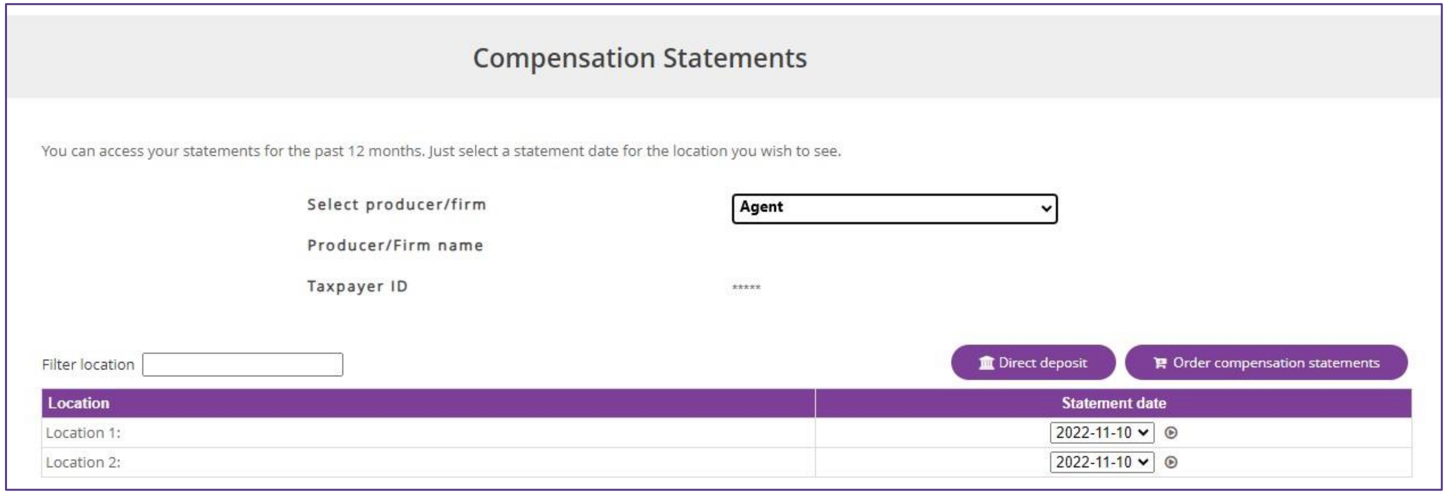
Compensation Statements will show you the exact statement for the date paid.

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.



Compensation Statements



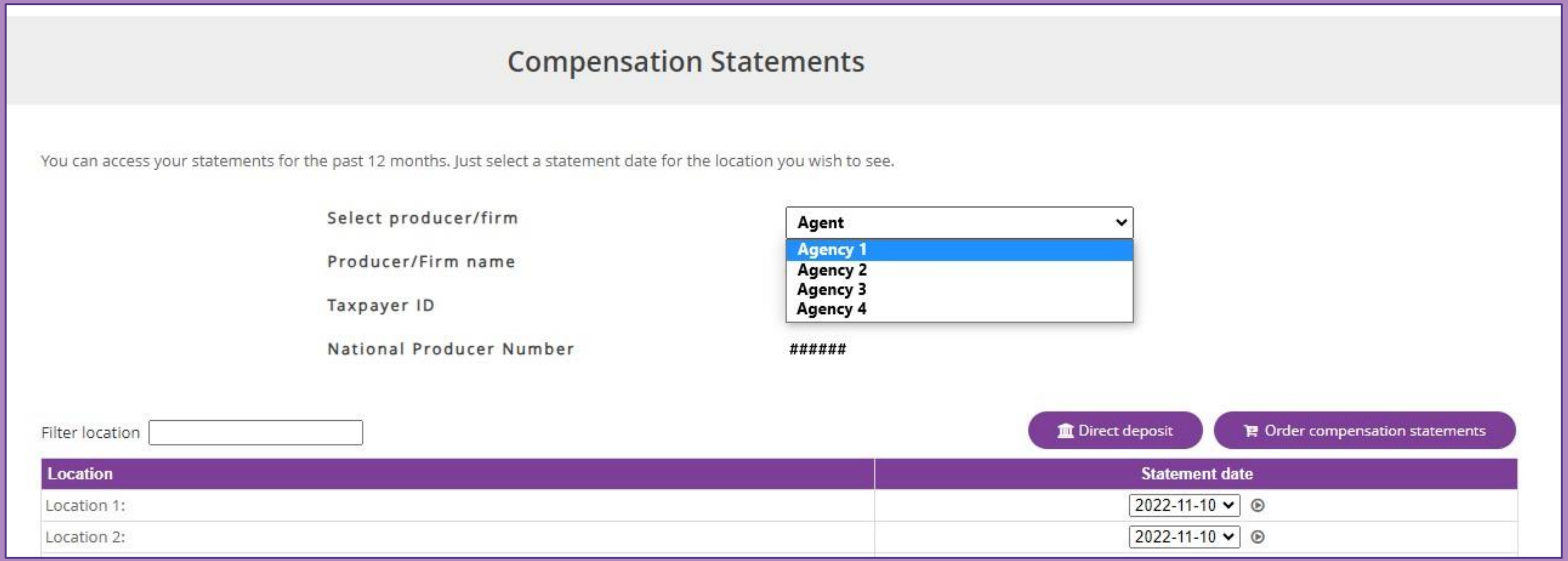
Individual Agents

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.



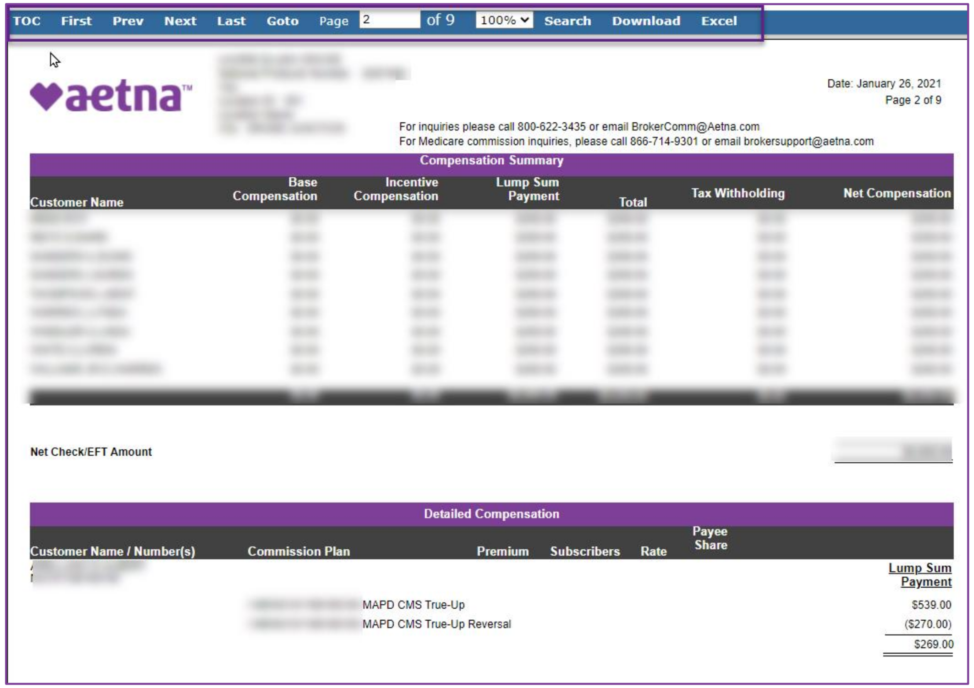
Compensation Statements

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.



Compensation Statements

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 - ME0000OH	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	RhodeIsland, 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

Compensation Statements

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.

Sample Statement – Summary Page

**Alphabetical listing of all member activity for the given payout

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AETNA AGENCY
National Producer Number: 98765432
TIN:
Location ID: 001 Location Name:
City: MANCHESTER

Date: May 17, 2022
Page 1 of 4

For inquiries please call 800-622-3435 or email BrokerComm@Aetna.com
For Medicare commission inquiries, please call 866-714-9301 or email brokersupport@aetna.com

Compensation Summary

Customer Name	Base Compensation	Incentive Compensation	Lump Sum Payment	Total	Tax Withholding	Net Compensation
MEMBER, AETNA	$0.00	$0.00	$167.42	$167.42	$0.00	$167.42
MEMBER, AETNA	$0.00	$0.00	$3.67	$3.67	$0.00	$3.67
MEMBER, AETNA	$0.00	$0.00	$3.67	$3.67	$0.00	$3.67
MEMBER, AETNA	$0.00	$0.00	$23.92	$23.92	$0.00	$23.92
MEMBER, AETNA	$0.00	$0.00	$23.92	$23.92	$0.00	$23.92
MEMBER, AETNA	$0.00	$0.00	$23.92	$23.92	$0.00	$23.92
MEMBER, AETNA	$0.00	$0.00	$3.67	$3.67	$0.00	$3.67
MEMBER, AETNA	$0.00	$0.00	$3.67	$3.67	$0.00	$3.67
MEMBER, AETNA	$0.00	$0.00	$23.92	$23.92	$0.00	$23.92
CONNECTICUT, JANE	$0.00	$0.00	$70.00	$70.00	$0.00	$70.00
MEMBER, AETNA	$0.00	$0.00	$23.92	$23.92	$0.00	$23.92
MEMBER, AETNA	$0.00	$0.00	$3.67	$3.67	$0.00	$3.67
	$0.00	$0.00	$375.37	$375.37	$0.00	$375.37

Sample Statement – Detail Page

**Detail to support member activity indicated within the Summary pages

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AETNA AGENCY
National Producer Number: 98765432
TIN:
Location ID: 001 Location
Name:
City: MANCHESTER

Date: May 17, 2022
Page 3 of 4

For inquiries please call 800-622-3435 or email BrokerComm@Aetna.com
For Medicare commission inquiries, please call 866-714-9301 or email brokersupport@aetna.com

MEMBER, AETNA
CHXXXXXXXXX

I MECHXXXXXXXXX PDP Renewal — Lump Sum Payment: $3.67

MEMBER, AETNA
CHXXXXXXXXX

I MECHXXXXXXXX PDP Renewal — Lump Sum Payment: $3.67

MEMBER, AETNA
NGXXXXXXXXX

I MENGXXXXXXXXX MAPD Renewal — Lump Sum Payment: $23.92

CONNECTICUT, JANE
ME0000CT

VBE/123456ABC/12345678/Member_Happy — Lump Sum Payment: $70.00

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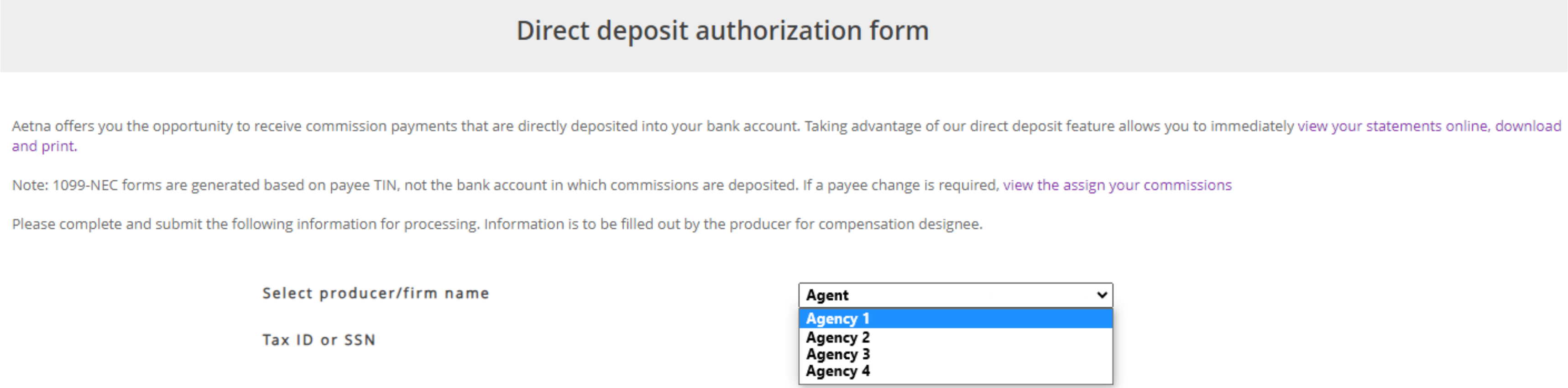
EFT/Direct Deposit Information

Click on the "Direct Deposit" button if you wish to verify or update your EFT information.

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.



Agency principals have the capability of selecting any agency they are principal of using the drop-down menu on the Direct Deposit Authorization form

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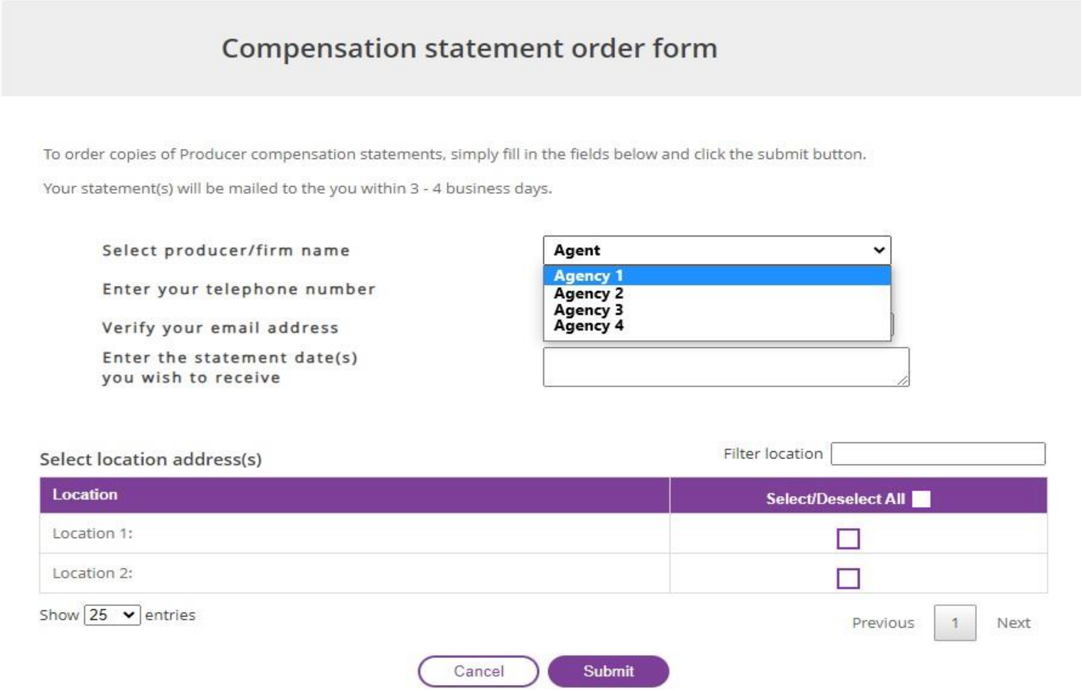
Ordering Compensation Statements

Click on the "Order Compensation Statements" button if you wish to receive a statement no longer available 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.

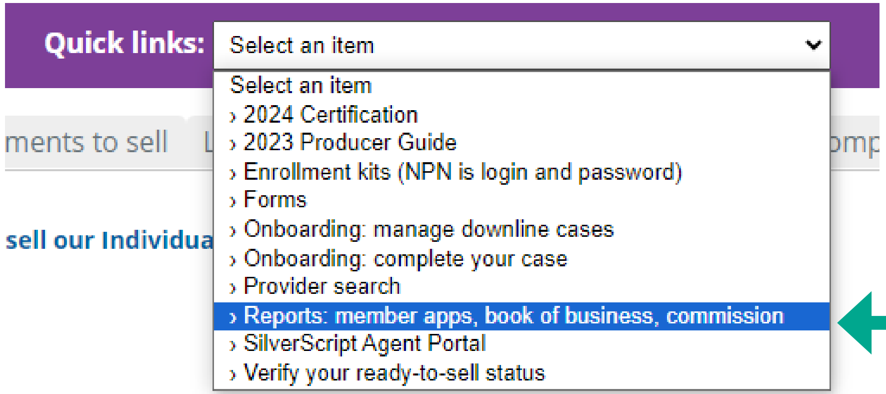
Agency principals have the capability of selecting any agency they are principal of using the drop-down menu on the statement request form.



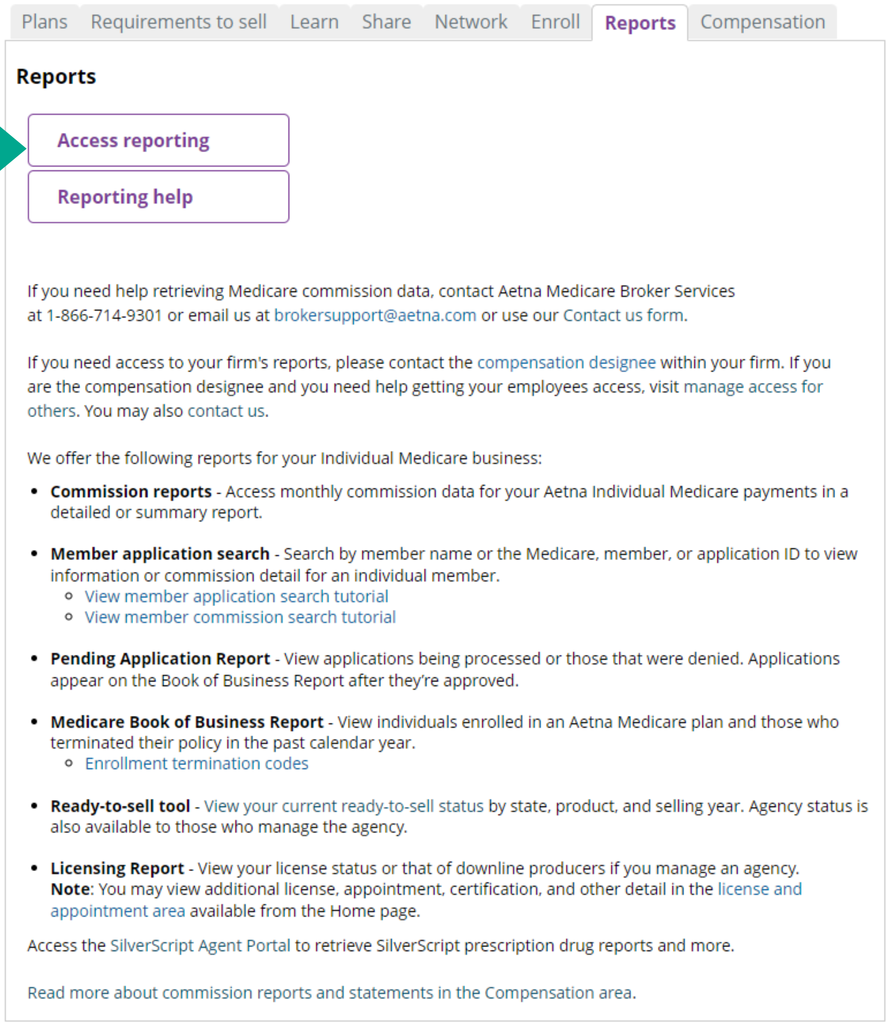
Generate Reports

Generating Individual Medicare Reports

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



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



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

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

Generating Individual Medicare Reports

From the Individual Medicare Reports menu, you can:

- Search for a member
- Check status of pending applications
- View your Book of Business
- See monthly commission information (for AG4 and above)
- Confirm RTS status
- Verify license information.

Individual Medicare Reports

Select report for

Enrollment reports & search tool

Search for member application

Pending applications report

Medicare book of business report

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.

August 2023

July 2023 | June 2023 | May 2023 | April 2023 | March 2023 | February 2023

January 2023 | December 2022 | November 2022 | October 2022 | September 2022 | August 2022

Requirements to sell reports

Ready to sell?

License status report

If you are the principal of an agency, or have been granted access to reports, use the drop-down menu to select the correct broker/agency for the desired information.

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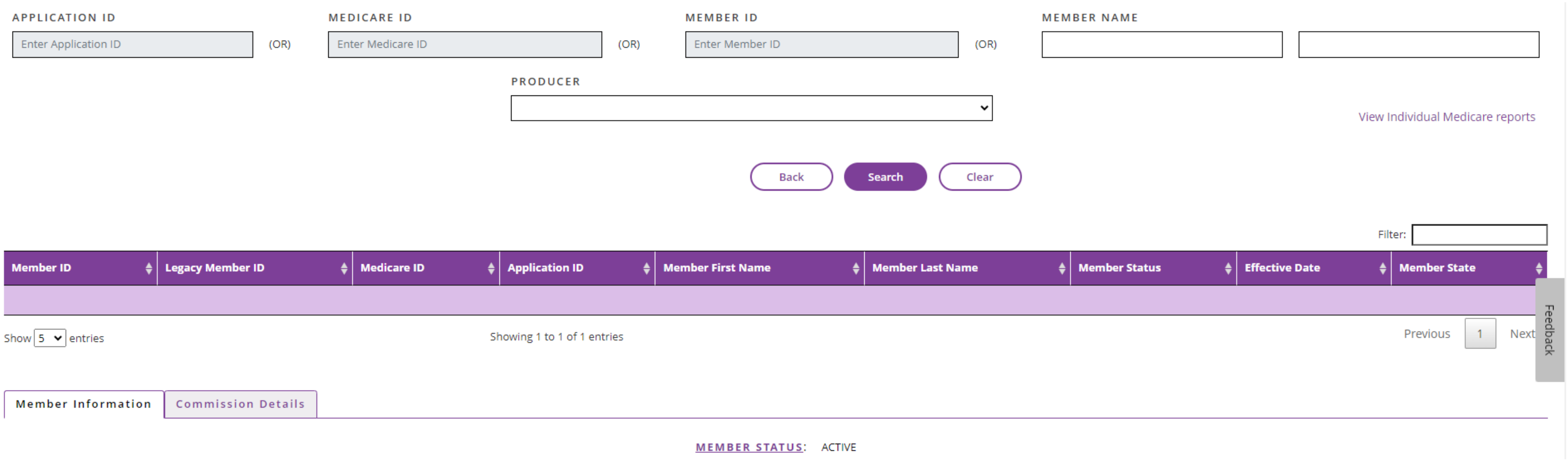
Medicare Member Search

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.



Pending Applications Report and Book of Business

Enrollment reports & search tool

- Search for member application
- Pending applications report
- Medicare book of business report

Pending Application Report shows applications submitted, but not yet enrolled.

"Pre-Subman Status" provides additional information about why the application has not yet been completed. Reasons could include awaiting CMS reply or request for additional information.

Pre-Submsn Status	CMS Submssion Date	CMS Accept Date	CMS Reject Date	CMS Reject Codes

1 of 1 100%

App Sign Date	App Receive Date	Effective Date	Plan Name	Writing Agent NPN	Writing Agent TIN	Writing Agent First Name	Writing Agent Last Name	Pre-Submsn Status	CMS Submssion Date	CMS Accept Date	CMS Reject Date	CMS Reject Codes	CMS Contract Nbr	PBP Code
6/23/2022	6/23/2022	8/1/2022	Aetna Medicare Premier Plus (PPO)	[illegible]	[illegible]	[illegible]	[illegible]	Awaiting CMS Reply	6/27/2022				H5521	272
6/23/2022	6/23/2022	8/1/2022	Aetna Medicare Premier Plus (PPO)	[illegible]	[illegible]	[illegible]	[illegible]	Awaiting CMS Reply	6/27/2022				H5521	272

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

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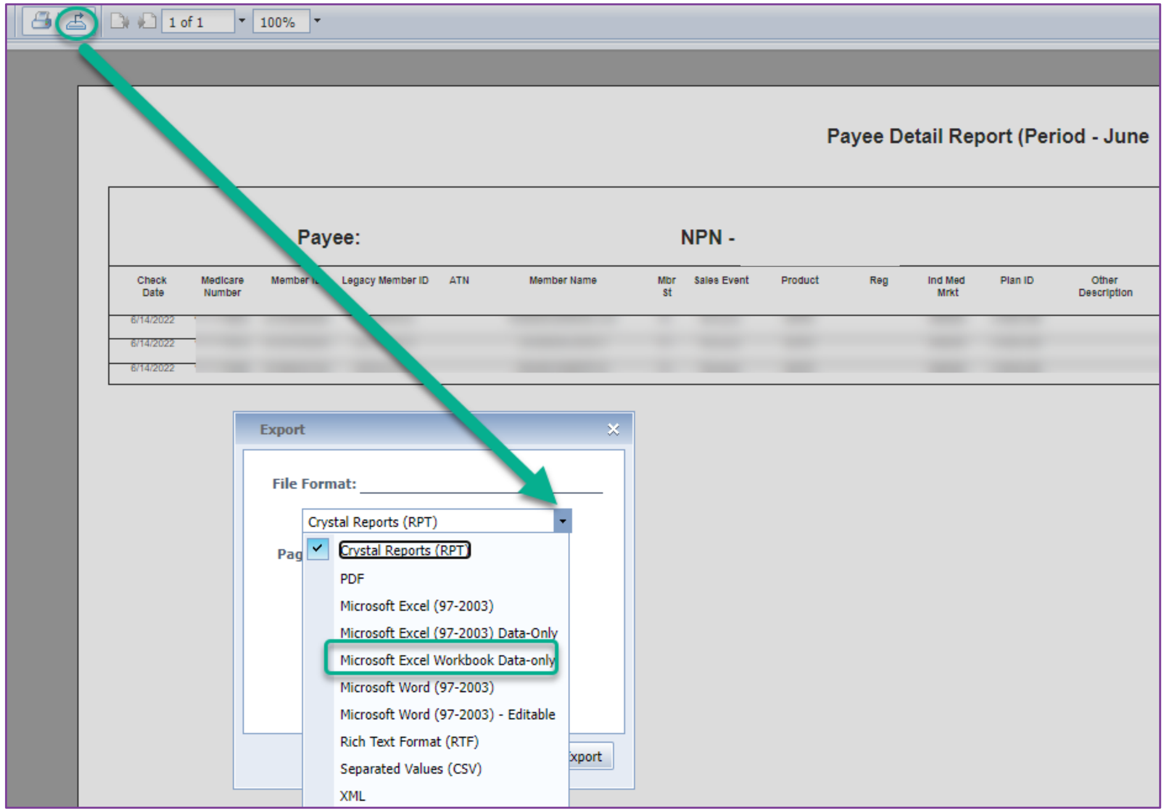
Exporting Pending Applications Report and Book of Business

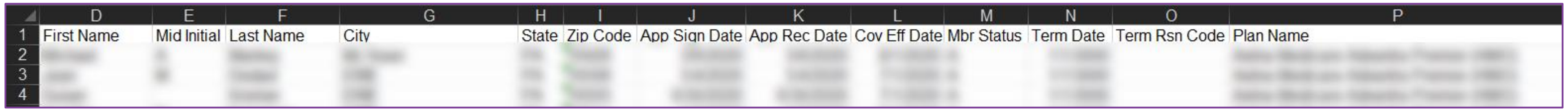
Pending Application and Book of Business reports open utilize a format called Crystal Reports.

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.
3. 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.



Commission Monthly Reports

Commission reports are available for the last 12 months.

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 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.

September 2023

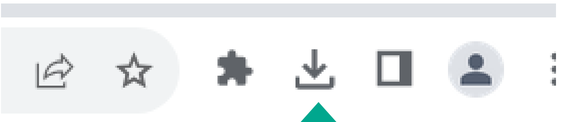
August 2023	**July 2023**	**June 2023**	**May 2023**	**April 2023**	**March 2023**
February 2023	**January 2023**	**December 2022**	**November 2022**	**October 2022**	**September 2022**

Your report is ready!

Your download will begin automatically, please check your folder.

OK

Click OK to open the Excel file or open the report from your recent downloads.



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

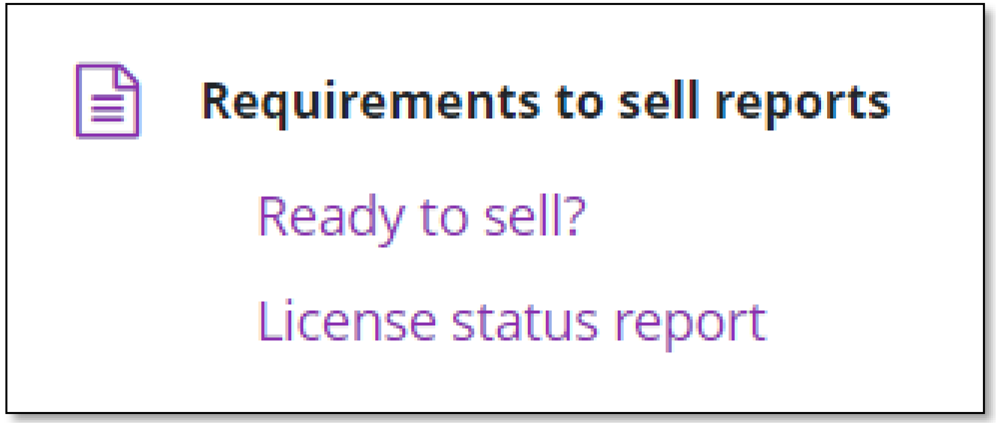
- × ATN
- × Reg
- × Downline Amount

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



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

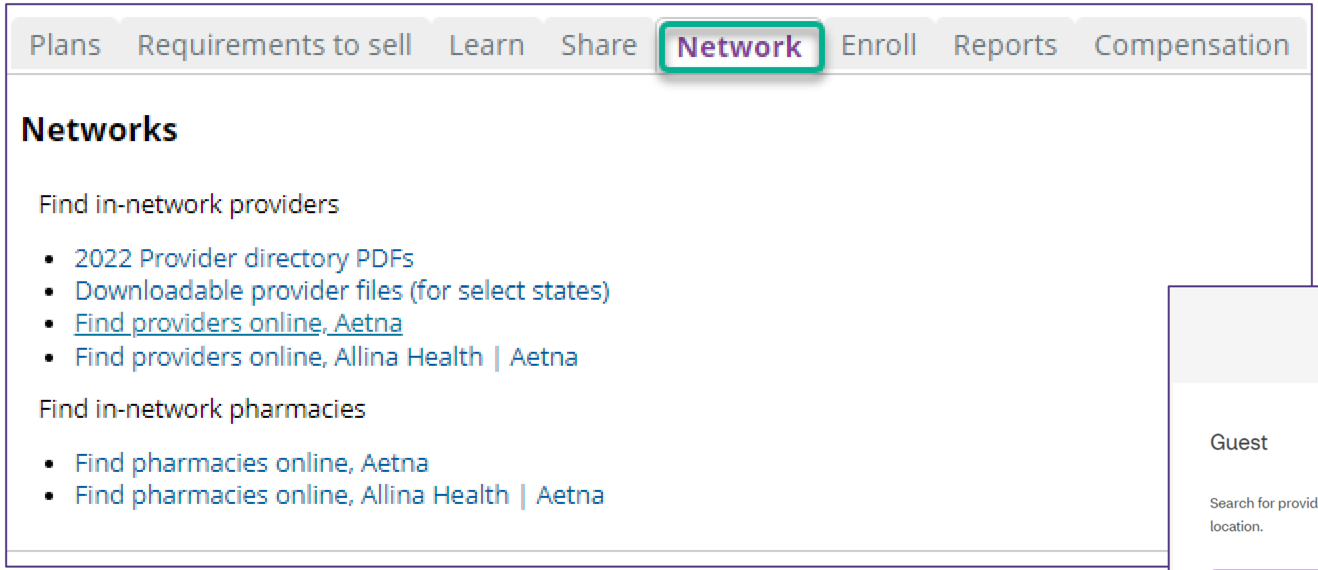
Click here for more information about the RTS map tool.

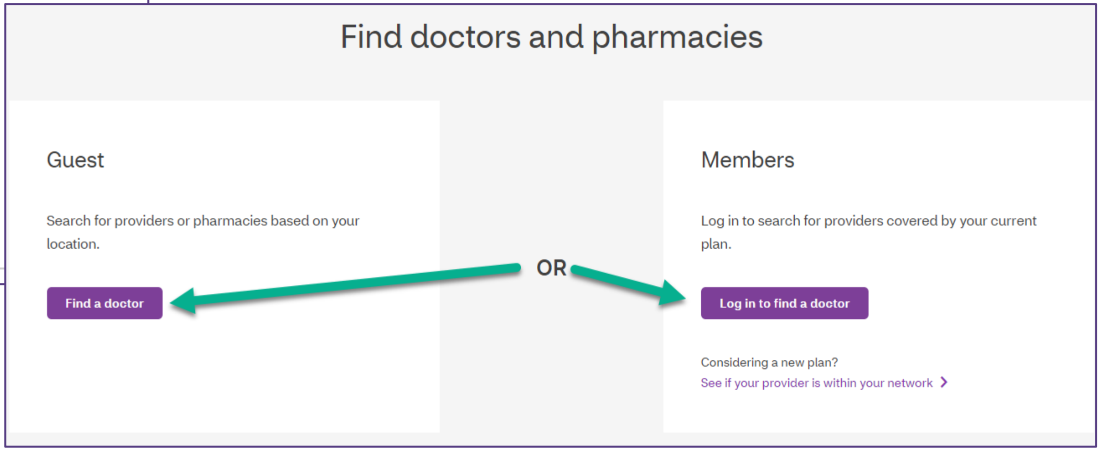
The License Status Report will provide information on each state license on file with Aetna Individual Medicare. This report provides the license status and expiration date.

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.





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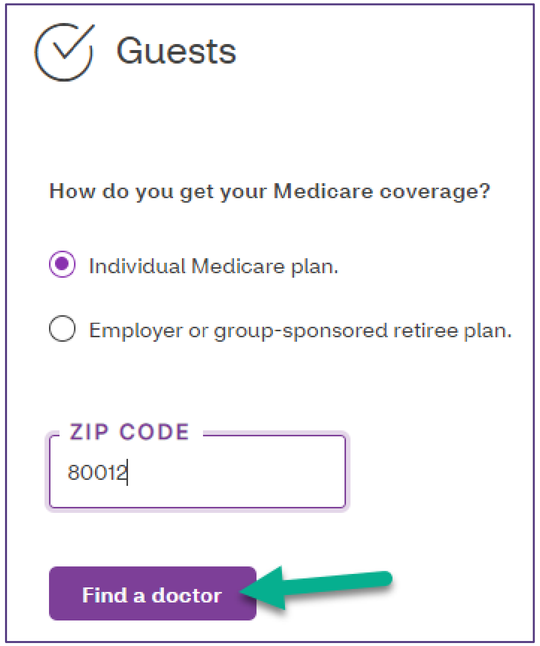
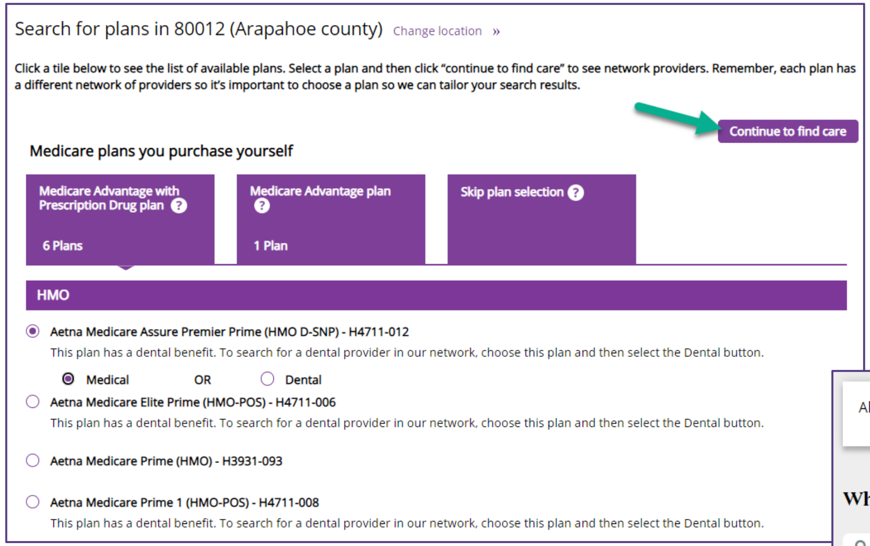
Provider Network Search - Medical

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



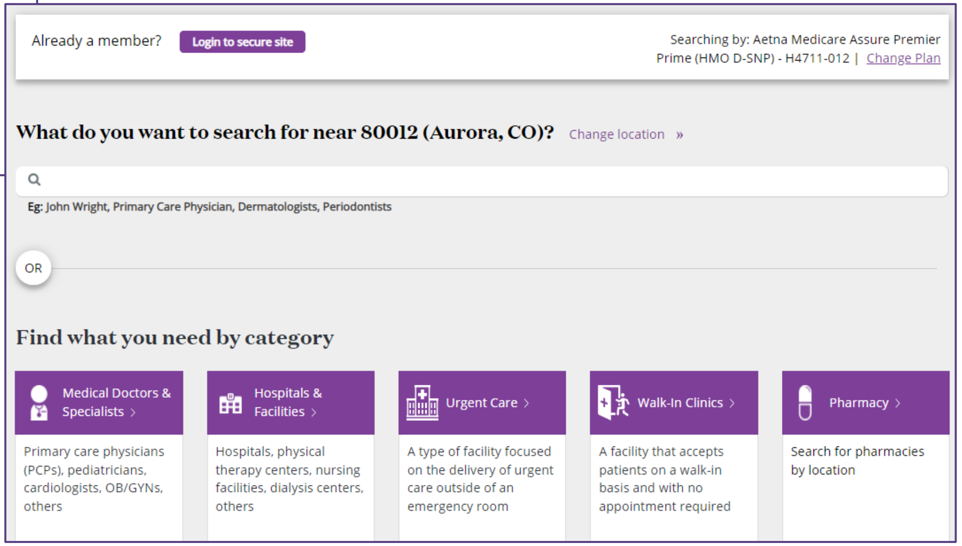


The next screen will direct you to choose the plan and determine medical or dental. You can choose to skip, but you will want to verify the plan later.

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.



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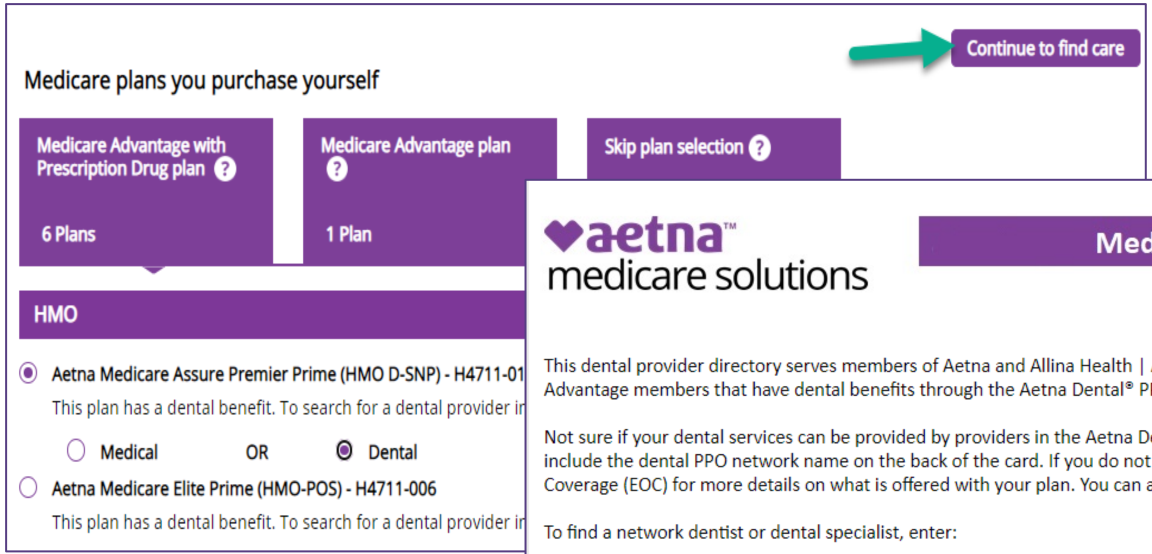
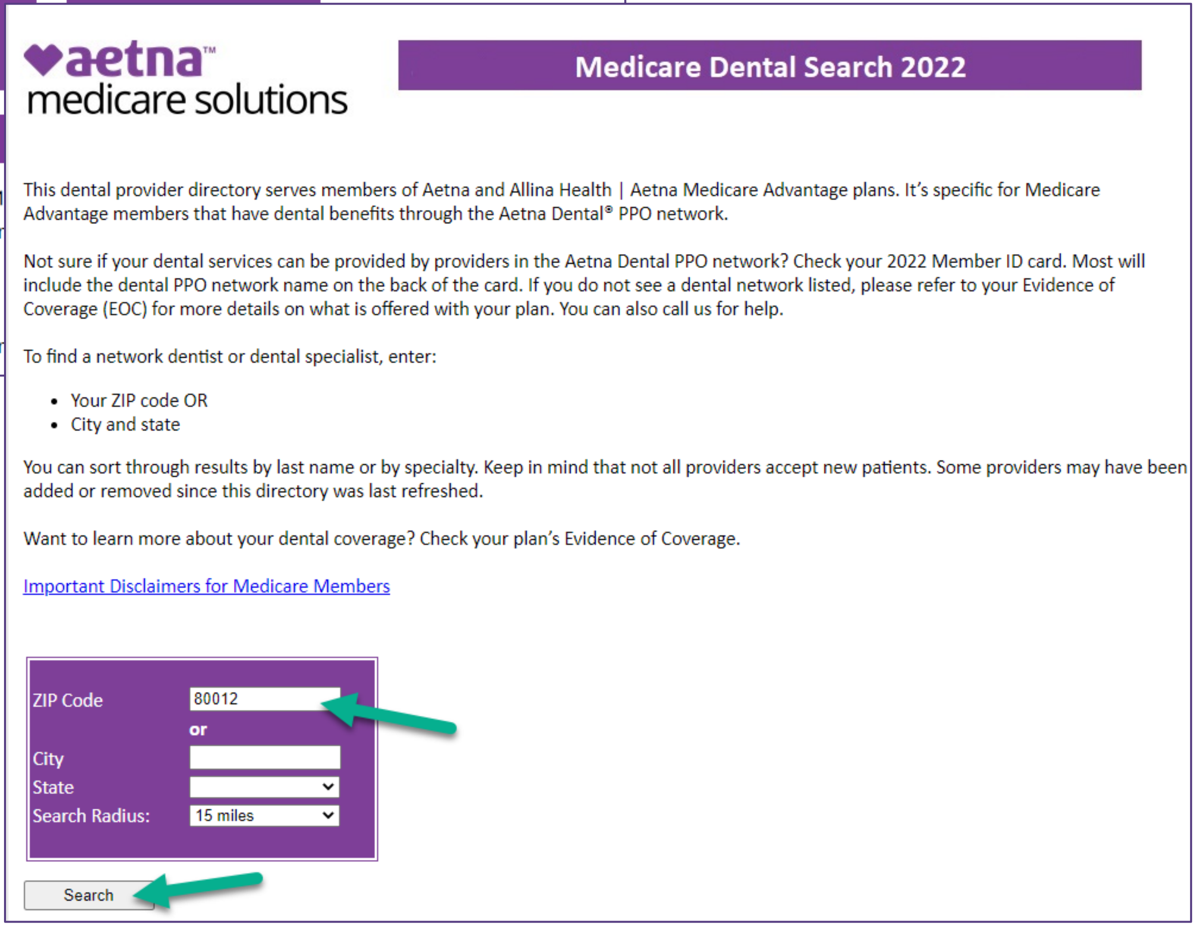
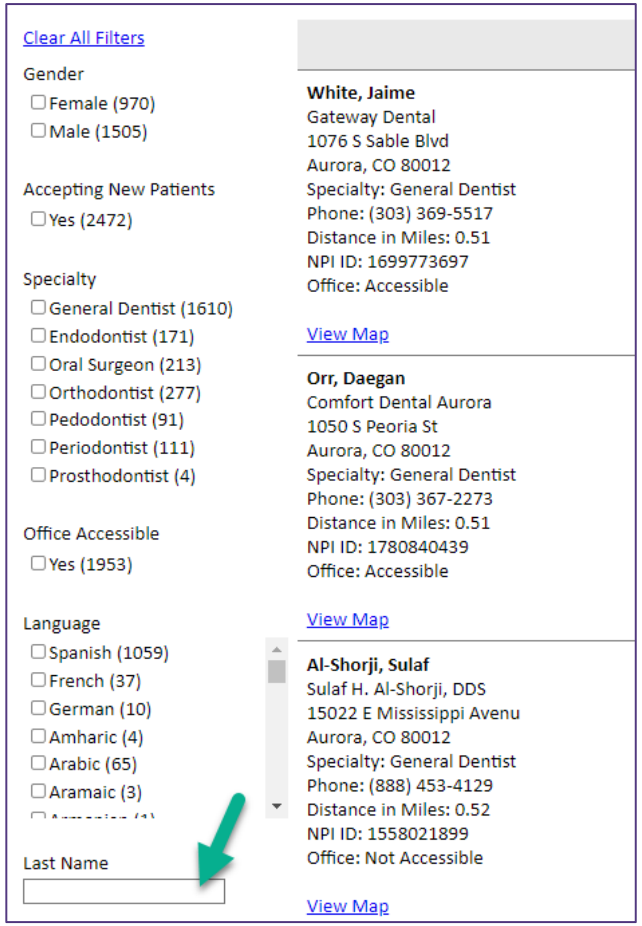
Provider Network Search - Dental





To find dental providers, click the Dental radio button.

Key in the Zip Code or location and Search



After you search, you can filter further by Dentist name or Specialty

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.

Plans | Requirements to sell | Learn | Share | **Network** | Enroll | Reports | Comp

Networks

Find in-network providers

- 2023 Provider directory PDFs
- Downloadable provider files (for select states)
- Find providers online, Aetna
- Find providers online, Allina Health | Aetna

Find in-network pharmacies

- Find pharmacies online, Aetna
- Find pharmacies online, Allina Health | Aetna

Find dentists

- Aetna Dental PPO network
- Liberty Dental network

Find a pharmacy near you

Medicare Part D plans have a network of pharmacies. Usually you must use a network pharmacy for the plan to pay for your prescription. Different plans may have different pharmacy networks, so it's always best to check.

Use our online search tool to find network pharmacies in your area.
Enter your zip code to find local pharmacies.

ZIP CODE

Find a 2022 pharmacy in our network

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.

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Thank you

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