

# Overview of the contracting process

# Summary

UPLINE	PRODUCER			AETNA
<p data-bbox="142 434 311 458"><b>INVITATION</b></p> <p data-bbox="85 498 369 725">Upline logs into Producer World, navigates to the Individual Medicare tab and clicks Medicare Producer Contracting.</p> <p data-bbox="65 765 388 958">Upline creates an onboarding case which triggers an email invitation to the producer from Aetna Medicare.</p>	<p data-bbox="452 434 736 458"><b>1. PRODUCER EMAIL</b></p> <p data-bbox="452 498 736 625">Producer receives the email invitation and follows the link to Producer World.</p> <ul data-bbox="452 665 755 896" style="list-style-type: none"><li data-bbox="452 665 755 762">• A producer without an account registers and logs in.</li><li data-bbox="452 802 755 896">• A producer with an account logs in.</li></ul>	<p data-bbox="867 434 1054 458"><b>2. NIPR &amp; W-9</b></p> <p data-bbox="819 498 1122 665">Upon login to Producer World, NIPR records are passed to the Aetna Medicare contracting system.</p> <p data-bbox="826 705 1114 832">If we require submission of a W-9, a form is presented for completion.</p>	<p data-bbox="1219 434 1456 458"><b>3. CONTRACTING</b></p> <p data-bbox="1186 498 1489 665">Producer is guided to Medicare Producer Contracting and prompted to complete the contracting case.</p>	<p data-bbox="1611 434 1818 458"><b>NOTIFICATION</b></p> <p data-bbox="1562 498 1866 665">Producer receives email notification from Aetna Medicare upon approval or rejection of contract.</p>

# Upline Creates Invitation

The upline logs into Producer World, navigates to the Individual Medicare tab and clicks Medicare Producer Contracting. Next, the upline creates the invitation to onboard.

The screenshot displays the Aetna Individual Medicare website interface. At the top, a navigation bar includes links for Home, Student Health, Small Group, Middle Market, National Accounts, Group Medicare, Individual Medicare, and Joint Ventures. The main header features the Aetna logo and the text 'Individual Medicare'. A left-hand menu lists options: Products, Find the right plan, Get a quote, Enrollment, Forms, Tools & apps, and Compensation. The main content area includes a 'Learn more' button and a vertical stack of four buttons: 'Access reporting', 'Access reporting help', 'Medicare Reporting Hub', and 'Medicare Producer Contracting'. A mouse cursor is positioned over the 'Medicare Producer Contracting' button. To the right, a 'Create New Case' section contains links for 'Bulk Invitation' and 'Individual Invitation'. An image of an elderly woman with a laptop is also visible in the background.

# Producer Receives Invitation

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The Producer receives the invitation from Aetna Medicare and follows the link which takes them to Producer World.



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 60 days of receipt. We recommend that you use the Google Chrome web browser with the Aetna Medicare Producer contracting system.

**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 Logs into Producer World

Producer registers and/or logs in to Producer World.

The image shows a user interface for the 'Producer World' system. At the top, a white box with a purple border asks 'Welcome! Do you have a Producer World account?' with 'Yes' and 'No' buttons. Below this are two main sections: 'Registration' and 'Secure Login'. The 'Registration' section has fields for Social Security Number (three boxes with dashes), Last Name, First Name, and Zip Code of your primary business address. The 'Secure Login' section has fields for User Name and Password, a 'SECURE LOGIN' button, and a link for 'Forgot Your Password Or User Name?'. To the right of the login fields is a 'Why Register?' section with a list of benefits and a 'REGISTER NOW' button. At the bottom right of the login section is a link for 'About Producer World Security/Encryption'.

**Welcome!**  
Do you have a Producer World account?

**Yes** **No**

**Registration**

Social Security Number:  
 -  -

Last Name:

First Name:

Zip Code of your primary business address:

**Secure Login**

Producer World® Log In

User Name:

Password:

**SECURE LOGIN**

[Forgot Your Password Or User Name?](#)

[Register](#) | [Your Privacy](#)

**Why Register?**  
Aetna online service center developed to meet the informational needs of our producers, general agents and firm employees including access to:

- Get quotes
- Find compensation information
- Check license status
- Set up direct deposit
- Get reporting
- And more

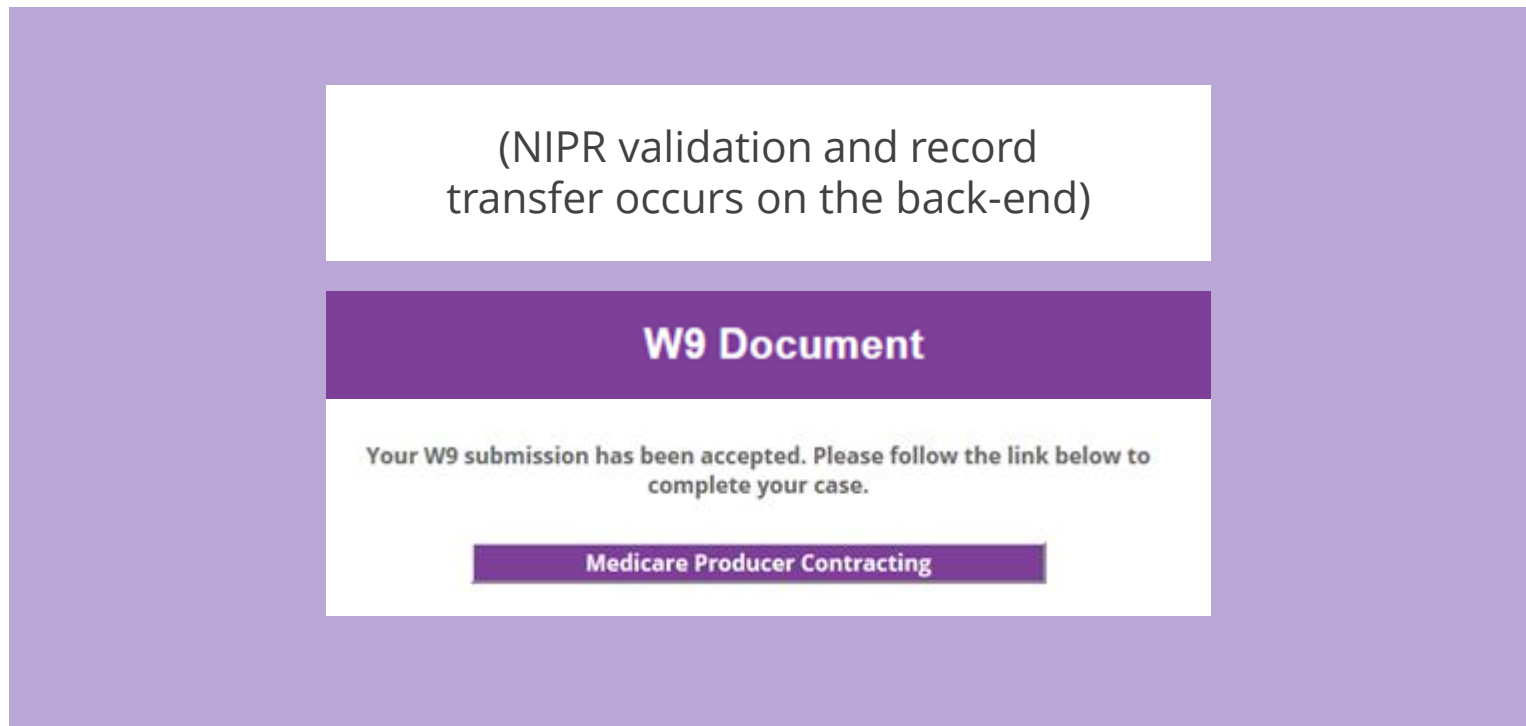
**REGISTER NOW**

[About Producer World Security/Encryption](#)

# Producer NIPR Validation & W-9

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Upon login to Producer World, NIPR records are passed to the Aetna Medicare contracting system. If we require submission of a W-9, the form is presented.



(NIPR validation and record transfer occurs on the back-end)

## W9 Document

Your W9 submission has been accepted. Please follow the link below to complete your case.

[Medicare Producer Contracting](#)

# Producer Guided to Contracting System

Producer is guided to Medicare Producer Contracting to submit their contract.

Review the General and Licenses tabs, which are populated with data from the National Insurance Producer Registry. Next, click on and complete each of the remaining tabs. Then, click the "Submit" button at the bottom of the screen to submit your case to Aetna. Please note processing of your contract will not begin until your certification is completed.

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

## Producer Demographics

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]		

## Firm Demographics

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

# Save and Return Access

**Note:** A producer who starts their contract but saves it for later and exits the system will need to return through Producer World.

Home Student Health Small Group Middle Market National Accounts Group Medicare Individual Medicare Joint Ventures

Producer World Home \ Individual Medicare

**Individual Medicare**

**Note:**

Recruits in status 1 (Producer World Processing) who have not yet completed Producer World registration must select **“Continue to on-board with Aetna.”**

Uplines, business users, and recruits in status 2 (Producer Application) who have completed Producer World registration may select the **“Medicare Producer Contracting”** button to access the system.

**Quick links** Product Reports Compliance Marketing Tools Contracting Contacts

- Requirements to sell
- Order enrollment kits
- How to enroll
- Medicare Producer Contracting
- Continue to on-board with Aetna**
- Stay informed

Welcome to the Individual Medicare section of Producer World! Use this section to find key topics and tools to help you sell MA/MAPD products.

For details, check out the [Aetna Medicare Producer Guide](#). It has everything you need to know to do business with us and sell our MA/MAPD products. It's also easy to search. Once open, just press the "ctrl" and "f" keys and then type in a search term.

Looking for info on Medicare Supplement and ancillary products? Visit [www.aetnaseniorproducts.com](http://www.aetnaseniorproducts.com) to login to a separate agent portal. Or contact the Aetna Senior Supplemental Insurance Agent Services team at 800 264.4000, option 2, option 3, option 1 for help.





# Medicare Producer Contracting

How to submit an Individual Medicare contract

# Project Overview

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We're replacing our existing Aetna Medicare contracting system (nomoreforms™) with an improved tool that will expedite the contracting process for MA/MAPD products.

The new contracting tool (powered by CallidusCloud®) will streamline and simplify the contracting process, and improve the onboarding/contracting experience for new Medicare producers.

*Later this year, we're also launching new improved reporting capabilities. The launch date is still being determined. For the time being, you'll need to continue using the existing reports available through Producer World.*

# Current State Vs New State

Action	Current State	Future State
Platform	nomoreforms™	Producer World
Onboarding	Top-of-hierarchy provides a package code and link to nomoreforms™	Upline recruiter (any level) creates a case in the contracting system which triggers an email invitation to onboard
Producer Access	Producer logs into nomoreforms™ with a package code	Producer receives an email invitation that links to Producer World for registration and/or log in which triggers process
Producer submission	<p>Producer inputs name/SSN</p> <p>Producer inputs demographic information and completes all required fields including agency name/TIN if contracting the agency</p> <p>Producer submits the contract to the top-of-hierarchy</p>	<p>Producer inputs name/SSN</p> <p>Systematic interfaces with NIPR and Aetna contracting retrieve existing data which is presented and then producer completes any required information including W9</p> <p>Producer submits the contract to Aetna Medicare</p>
Notification	TOH receives email notification	Aetna sends email notification when approved or rejected
Hierarchy	<p>TOH logs into nomoreforms™</p> <p>TOH reviews the contract and completes the Hierarchy sheet and Establishment of LOA form then submits the contract to Aetna</p>	The recruiter indicated during the onboarding process will establish the upline hierarchy

# Current State Vs New State

Action	Current State	Future State
Demographics License updates Banking updates	nomoreforms™ or Producer World (Payee changes through nomoreforms™)	<ul style="list-style-type: none"> <li>▪ Demographics and license updates via NIPR database feed</li> <li>▪ Banking updates via Producer World</li> <li>▪ W9/Payee change instruction on Producer World</li> </ul>
Principal Change	nomoreforms™ with Principal Change documents	<p>Medicare Producer Contracting with Principal Change documents</p> <p>The system will validate if the agency principal differs from the person submitting the contract and prompt upload of documentation</p>
Hierarchy Change	nomoreforms™ with Notice of Intent / Transfer Release form	<p>Medicare Producer Contracting</p> <p>The system will validate if the T/R guidelines have been met and prompt producer to upload documentation if necessary</p>

# Contract Flow

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## Invitation

- Recruiter initiates case
- Sends invitation to prospective agent



## Producer World

- Producer World Individual/Firm Registry
- NIPR Bump/PD Entity Check
- W9 Validation/Questionnaire



## Medicare Producer Contracting

- Background Authorization
- EFT Completion
- Contract 'Type' Check
  - ✓ Agency
  - ✓ Principal Change
  - ✓ Hierarchy Change/Transfer/Release Validation
  - ✓ Contract Signature
  - ✓ Certification Check



## Broker Operations

- Contract Review
- Approval/Rejection

# Producer Invitation

Open the invitation email from [AetnaMedicare@aetna.com](mailto:AetnaMedicare@aetna.com). The subject line will read, "You have been invited to contract with Aetna Medicare!" *The final version of the invitation will also indicate the top of hierarchy.*



# Producer World

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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.

# Producer World Cheat Sheet Summarized

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## Basic registration

The registration link is located here: <https://www.aetna.com/producer/login>.

Select the role which best describes you from the list below and complete registration.

Individual agent/broker (appointed with Aetna)

Principal of a firm

Member of a firm (agent/broker/employee associated with an appointed firm)

Firm employee chosen to manage access for others

## Managing access for a firm

Producer World allows firms to determine who should have access to their information. There are four main roles, each with their own privileges.

Principal

Quoting/Enrollment/Billing (QEB) designee

Compensation designee

Multi-firm Individual Medicare reports designee

The **Principal** role is required for all firms. It is generally the owner or president of the firm. However, it can be anyone at the firm, whether appointed or not. The primary role of the principal is to assign someone at the firm to manage quoting/enrollment/billing or compensation for others and/or assign those privileges to himself.



# When is Intervention Necessary

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## Contact the department indicated if you receive one of these errors ...

### Producer World profile

You may receive an error if our records indicate that you are actively associated with an agency. In order to proceed, you must be registered as a licensed individual on Producer World. Please contact your former agency to terminate your relationship with their firm before proceeding. If you have any questions, contact the Producer World Helpdesk at 1-800-225-3375.

### Multiple lines of business

You may receive an error if you have multiple bank accounts with Aetna and attempt to input banking information. Contact the External Compensation team for assistance at 1-800-622-3435.

### Contracting an agency in IA, RI, TN or WI (only)

You may receive an error if you are contracting an agency in the following states and have no other state licenses: IA, RI, TN or WI. These states do not require an agency license so our system will be unable to retrieve agency records from the National Insurance Producer Registry. If an error message is received, contact the Broker Services Department at 1-866-714-9301.

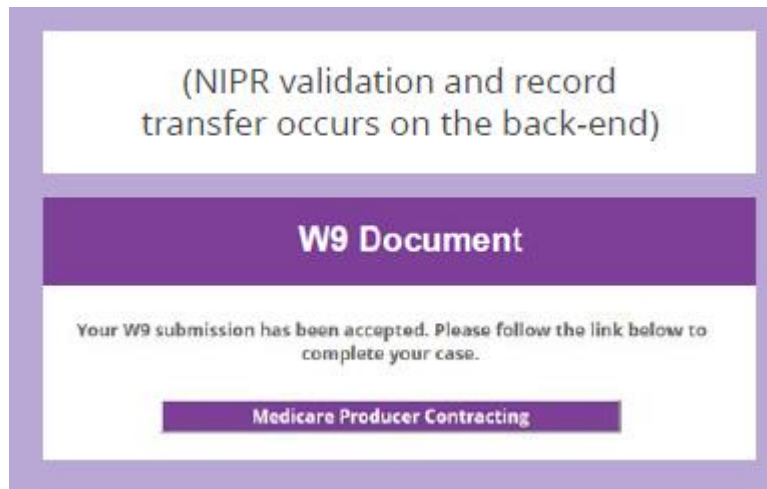
# NIPR validation & W9

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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](#).

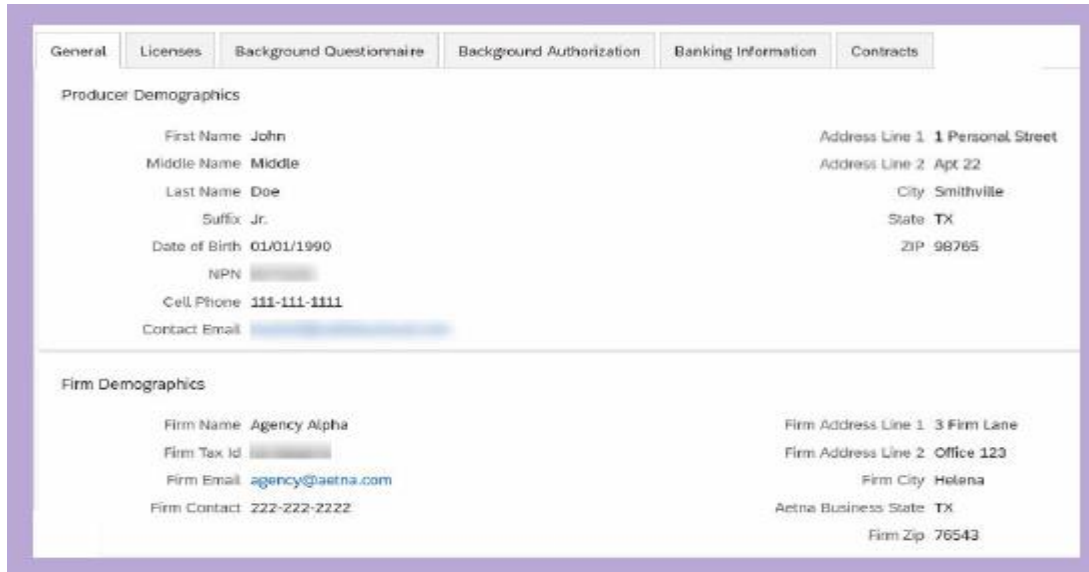
If we require you to submit a W-9, you will be presented with a form to complete.



# Contracting Tabs

Next, you will be guided to Medicare Producer Contracting where you will be prompted to complete your contract. You will receive an on-screen confirmation of submission.

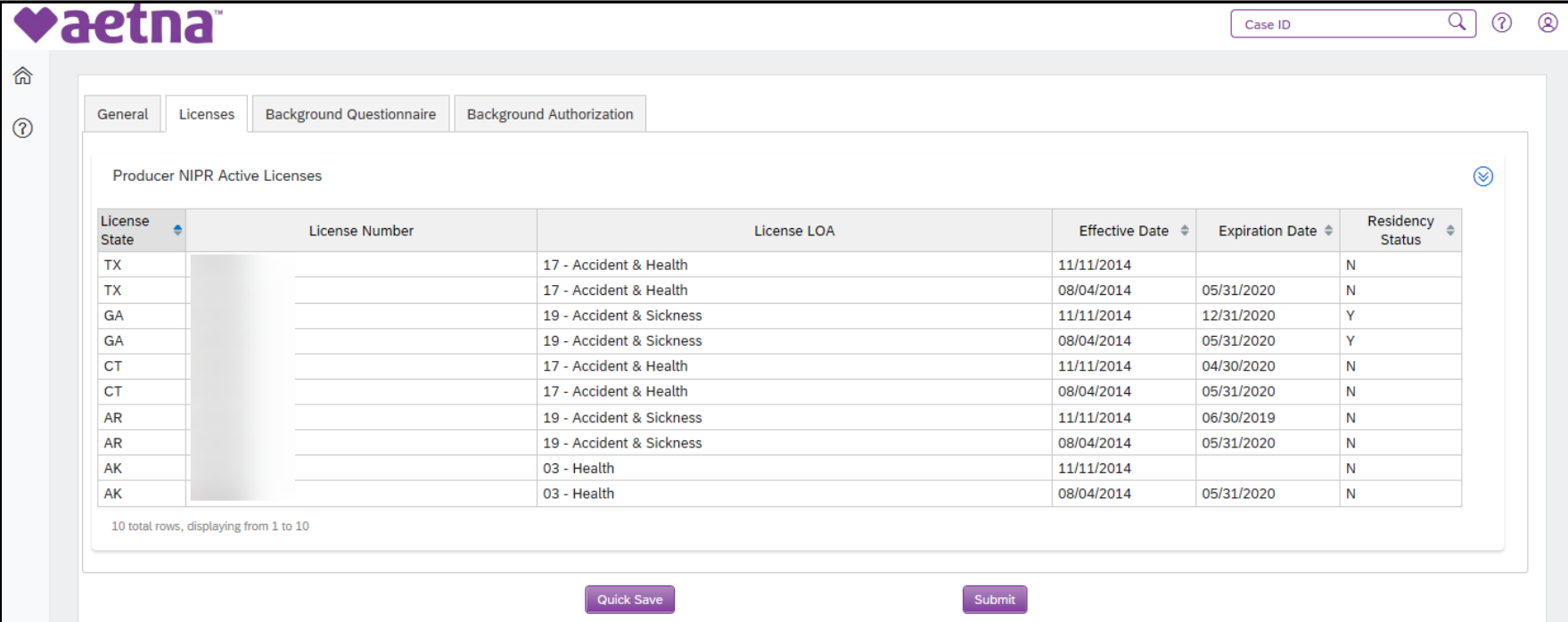
- **Note:** You may choose the “Quick Save” option to save your progress and exit the system if you need to return at a later time to complete your contract. In order to return where you left off, log into Producer World, go to the Individual Medicare tab and click, “Medicare Producer Contracting.”



The screenshot displays a web form with a navigation bar at the top containing tabs: General, Licenses, Background Questionnaire, Background Authorization, Banking Information, and Contracts. The 'Contracts' tab is selected. The form is divided into two main sections: 'Producer Demographics' and 'Firm Demographics'. The 'Producer Demographics' section includes fields for First Name (John), Middle Name (Middle), Last Name (Doe), Suffix (Jr.), Date of Birth (01/01/1990), NPN (redacted), Cell Phone (111-111-1111), Contact Email (redacted), Address Line 1 (1 Personal Street), Address Line 2 (Apt 22), City (Smithville), State (TX), and ZIP (98765). The 'Firm Demographics' section includes fields for Firm Name (Agency Alpha), Firm Tax Id (redacted), Firm Email (agency@aetna.com), Firm Contact (222-222-2222), Firm Address Line 1 (3 Firm Lane), Firm Address Line 2 (Office 123), Firm City (Helena), Aetna Business State (TX), and Firm Zip (76543).

# License Tab

Review the Licenses tab which reflects your NIPR license records.



The screenshot displays the Aetna web interface. At the top left is the Aetna logo. In the top right corner, there is a search bar labeled "Case ID" and three icons: a magnifying glass, a question mark, and a user profile icon. Below the logo, there are navigation tabs: "General", "Licenses", "Background Questionnaire", and "Background Authorization". The "Licenses" tab is selected. The main content area is titled "Producer NIPR Active Licenses" and contains a table with the following columns: License State, License Number, License LOA, Effective Date, Expiration Date, and Residency Status. The table lists 10 rows of license data. At the bottom of the table, it says "10 total rows, displaying from 1 to 10". Below the table, there are two buttons: "Quick Save" and "Submit".

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
GA		19 - Accident & Sickness	11/11/2014	12/31/2020	Y
GA		19 - Accident & Sickness	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

# 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 text box.

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

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# Background Authorization

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

**DISCLOSURE REGARDING CONSUMER REPORTS**

Aetna (the Company) may obtain information about you from a consumer reporting agency for employment purposes as defined by the Fair Credit Reporting Act. Thus, you may be the subject of a "consumer report" which may include information about your character, general reputation, personal characteristics, and/or mode of living, gathered by the consumer reporting agency and reported to the Company. These reports may contain, but may not be limited to, information regarding your criminal history, credit history, motor vehicle records ("driving records"), verification of your education or employment history or other background checks.

**INFORMATION ABOUT YOU REQUIRED FOR BACKGROUND CHECK**

**Applicants:** Please provide the following information about yourself to facilitate a background check. Please note, all fields are required. When the "I have no middle name" is selected, Applicant Insight will process the corresponding services in a means consistent with the individual having no middle name. If no middle name ("NMN"), no middle initial ("NMI"), or some other similar text is provided, Applicant Insight will process the corresponding services in a means consistent with the individual having a middle name of "NMI" or "NMN". As such, should the screening or hiring process reveal identifying information inconsistent or contradictory with that provided below, the Company may classify your omission of that information as deliberate falsification.

Last name: [REDACTED] First name: [REDACTED] Middle name: [REDACTED]  I have no middle name

Other Names/Aliases: [REDACTED]  
*Include Maiden or Name Changes, No Direct Derivatives Ex: Susan vs. Sue, David vs. Dave*

\*Social Security: [REDACTED] \*Date of Birth: [REDACTED]  
*\*This information will be used for background screening purposes only and will not be used as hiring criteria.*

Driver's License: [REDACTED] DL State of Issuance: [REDACTED]

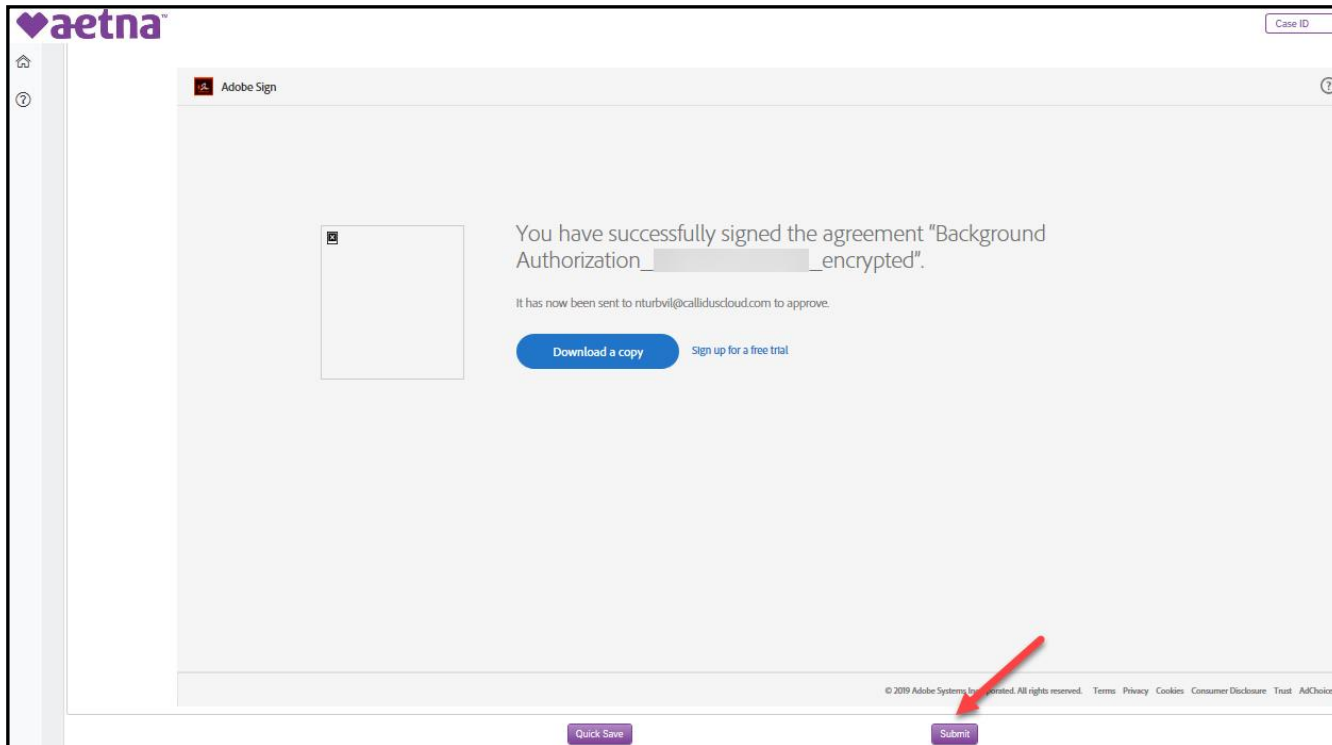
\*Phone Number: [REDACTED] Email Address: [REDACTED]  
*\*\*This information will be used for correspondence related to the background check process when allowable by law*

Present Address: [REDACTED]

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.”

# Background Authorization

Review, sign and submit the Background Authorization.



# 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 \*

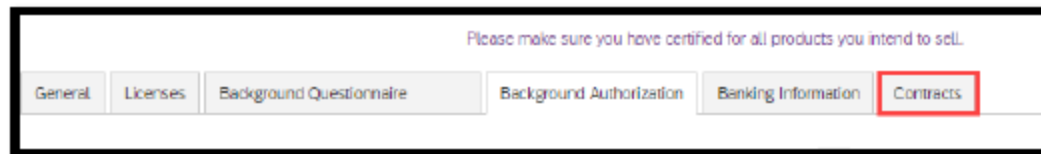
Bank Account \*

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



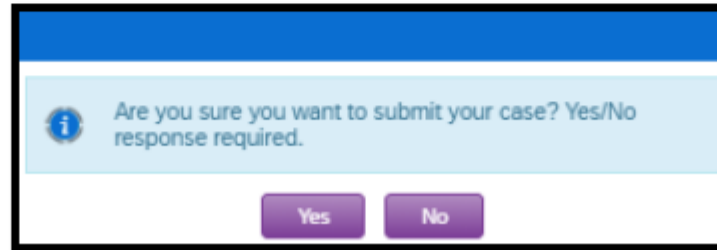
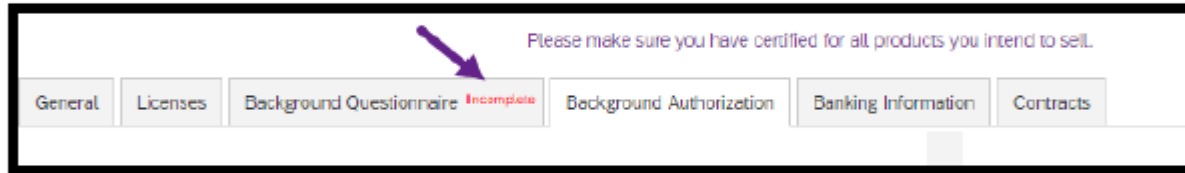
# Contracts Tab

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.”



# Contracts with Incomplete Data Fields

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.

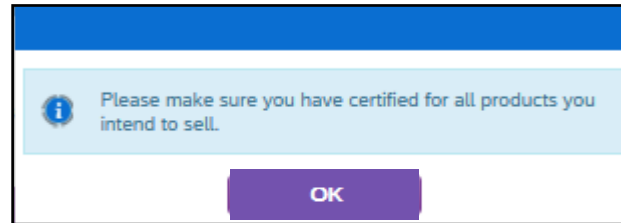


# Acknowledge the certification reminder

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Click “OK” to acknowledge the certification reminder.

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



# What happens next?

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The agent's contract submission will be processed by the Aetna Medicare Broker Services Department.

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

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

# Notifications

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The Agent 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, the agent will receive a “Missing Information” email notification from **Broker Support**.

# When am I ready-to-sell?

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



# Managing and Updating a Current Agent's Contract

# How to Make Contract Updates

Managing demographics	
Current State	Future State
Log into Producer World and update your profile in the "Manage your personal information" section.	No action required as long as your records are updated with the National Insurance Producer Registry (NIPR). Your demographics from NIPR will flow into the new contracting tool. <ul style="list-style-type: none"> <li>Updating name may require completion of a new W9 form.</li> </ul>
Additional state appointments	
Current State	Future State
Log into nomoreforms™ with a package code and select additional states on the Contract Information Sheet.	No action required. State license, appointment and termination information will flow from NIPR into the new contracting tool.
Updating banking information	
Current State	Future State
Option #1 - Log into Producer World and navigate to the Compensation section. Click "Get compensation statement" then select the applicable direct deposit link (individual or firm). Submit the updated form online.	Option #1 remains the same. Updates should continue to be submitting via Producer World.
Option #2 – Log into nomoreforms™ and complete a new EFT form.	Option #2 no longer exists.
Updating W-9	
Current State	Future State
Option #1 - Log into Producer World and navigate to the Compensation area then select the Medicare tab. Complete a new W-9 form and submit it to the External Producer Compensation team via mail, fax or email.	Option #1 remains the same. Log into Producer World and navigate to the Compensation area then select the Medicare tab. Complete a new W-9 form and submit it to the External Producer Compensation team via mail, fax or email.



# Managing demographics

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No action is required as long as the agent's records are updated with the National Insurance Producer Registry (NIPR). This will be maintained by having you agent submit changes to their resident state Department of Insurance. Your agent's demographics from NIPR will flow into the new contracting tool.

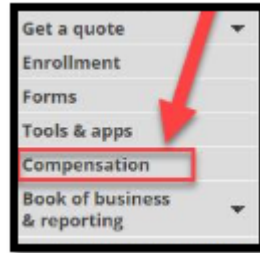
# Additional state appointments

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No action is required. State license, appointment and termination information will flow from NIPR into the new contracting tool

# Updating banking information

Log into Producer World and click on Individual Medicare. From the left navigation menu, click “Compensation.”



Click “Get compensation statement.”



# Updating banking information

Select the appropriate “Direct deposit...click here” option.



The screenshot displays the 'Compensation Statements' interface. At the top, a blue banner reads: 'You can access your statements for the past 12 months. Just select a statement date for the location you wish to see.' Below this, there are two sections for updating banking information. The first section is for an 'Individually Licensed Producer' and includes fields for 'Taxpayer ID #', 'National Producer Number', and 'Location ID: 1'. A red box highlights the 'Individually Licensed Producer' label. To the right of the 'National Producer Number' field is a red box containing the text '> Direct Deposit...click here'. Below these fields is a date selector set to '2018-06-10' and a 'View' button. The second section is for a 'Firm Name' and includes fields for 'Taxpayer ID #' and 'Location ID: 1'. A red box highlights the 'Firm Name' label. To the right of the 'Taxpayer ID #' field is a red box containing the text '> Direct Deposit...click here'. Below these fields is a date selector set to '2018-06-31' and a 'View' button. A red arrow points from the top of the page down to the 'Direct Deposit...click here' link in the first section.

Complete the direct deposit form as needed and click “Submit” at the bottom.

- Changes are not limited to Individual Medicare but apply to all lines of Aetna business.
- Requests will be processed within two pay cycles. You may receive a paper check in the meantime.

# Updating W-9

Log into Producer World and navigate to Individual Medicare. From the left navigation menu, click “Compensation” and then go to the Medicare tab. Instructions are provided. Changes are not limited to Individual Medicare, but apply to all lines of Aetna business.

The screenshot shows the Aetna Compensation Services web page. The breadcrumb trail is "Producer World Home \ Compensation Services". The Aetna logo is in the top left. The main heading is "Compensation Services". A note states: "NOTE: Google Chrome or Mozilla Firefox browsers are required to download statements." Below this is a navigation bar with tabs: Overview, SG, MM, NA, Medicare (highlighted with a red box), Student health, and Help. On the left is a vertical navigation menu with items: Products, Find the right plan, Get a quote, Enrollment, Forms, Tools & apps, Compensation (highlighted with a red box), Book of business & reporting, License and appointment, Manage your personal information, Manage access for others, Find a provider, Find a medication, Compliance, and Contact us / Help. The main content area is titled "Individual Medicare" and contains a list of links: "Aetna Individual Medicare reports", "Become an Aetna producer", and "Assignment of commissions". Below this is a section "W 9 instructions and documents:" with a red arrow pointing to it, containing links for "W-9 form", "W-9 instructions", "Sample Individual Broker W-9", and "Sample Agency W-9". At the bottom of this section is contact information for Aetna ATTN: External producer compensation: "1425 Union Meeting Road, U22N, P O Box 1167, Blue Bell, PA 19422, Fax: 860-754-9010 | Email: BrokerComm@aetna.com". A final note at the bottom of the page says: "For questions relating to Individual Medicare, contact Individual Medicare Broker Services at 1(866) 714-9301, M-F 8am to 6pm ET, or email the Broker Services Department at BrokerSupport@aetna.com."

# How to Make Contract Level Change

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## How to make a contract level change within your hierarchy...

Current State	Future State
<p>Producer logs into nomoreforms™ using a package code for the new level. Producer submits the contract to their upline.</p> <p>Top-of-hierarchy completes the Hierarchy Sheet and submits the contract to the Aetna Medicare Broker Services Department for processing.</p>	<p>Upline logs into Producer World and accesses Medicare Producer Contracting. Upline creates a new “case” which triggers an email invitation to the producer.</p> <p>Producer follows the link in the invitation and registers and/or logs into Producer World. Producer is guided to Medicare Producer Contracting to submit their new contract.</p>

# How to Add a Level Inside a Current Hierarchy

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## How to add or remove a level within your hierarchy...

Current State	Future State
<p>Upline requests that Aetna move the existing contract back to their queue in nomoreforms™.</p> <p>Upline logs into nomoreforms™ and updates the Hierarchy Sheet then transfers the contract back to Aetna for processing.</p>	<p>Upline logs into Producer World and accesses Medicare Producer Contracting. Upline creates a new “case” based on the new hierarchy which triggers an email invitation to the producer.</p> <p>Producer follows the link in the invitation and registers and/or logs into Producer World. Producer is guided to Medicare Producer Contracting to submit their new contract.</p>

# How to Transfer to a New Top of Hierarchy

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## How to transfer to a new top-of-hierarchy...

Current State	Future State
<p>Producer logs into nomoreforms™ and submits a new contract using the new upline's package code and attaches a completed <i>Notice of Intent/Transfer Release form</i>, if applicable.</p>	<p>The new upline logs into Producer World and access Medicare Producer Contracting. Upline creates a "case" which triggers an email invitation to the producer.</p> <p>Producer follows the link in the invitation and registers and/or logs into Producer World. Producer completes the onboarding process which validates the Transfer Release policy. If the guidelines are not met, the producer will be prompted to attach a completed <i>Notice of Intent/Transfer Release form</i>.</p>



# Transfer Release/ Notice of Intent

The system will identify if a change to a new hierarchy has occurred. This will trigger a validation of Aetna's Transfer Release policy. If the guidelines are not met, you will be prompted to submit a Notice of Intent / Transfer Release form.

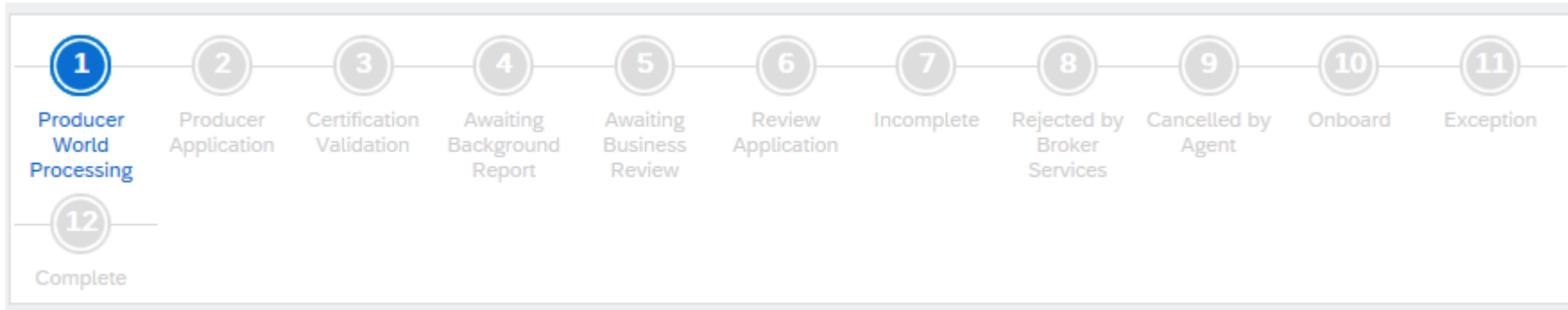
The screenshot shows a web interface with a navigation bar at the top containing tabs: General, Licenses, Background Questionnaire, Background Authorization, Banking Information, Contracts, and Transfer. The 'Transfer' tab is selected. Below the navigation bar, a message reads: "You will be completing a transfer with this onboarding request. Transfer application requires the 'Transfer Release of Notice of Intent' to be printed and uploaded to the case." In the center of the form, there is a blue link labeled "Transfer Release of Notice of Intent". To the right of this link is a "Transfer Upload" section with an empty text input field, a blue upload icon, and a blue 'X' icon. At the bottom of the form, there are two purple buttons: "Quick Save" and "Submit".



## Following Your Agent's Contract to Completion



# Contracting Case Statuses



- 1. Producer World Processing:** Agent has accepted the invitation and must log into Producer World to complete required information.
- 2. Producer Application:** Agent needs to complete required fields in Medicare Producer Contracting and submit the case.
- 3. Certification Validation:** Agent needs to complete certifications.
- 4. Awaiting Background Report:** Background report was ordered and is pending completion.
- 5. Awaiting Business Review:** Case is ready to be assigned to Aetna Medicare Broker Services for processing.
- 6. Review Application:** Case has been assigned to business team member for processing.
- 7. Incomplete:** Additional information is needed from agent before case can be processed. Agent would have received a letter from Broker Support advising what information is needed prior to processing.
- 8. Rejected by Broker Services:** Case has been rejected after Aetna Medicare Broker Services review. Rejection reason will be visible on the case.
- 9. Cancelled by Agent:** Agent or recruiter has cancelled the case.
- 10. Onboarding:** Aetna Medicare Broker Services has approved the case and information is being fed to Producer Directory system.
- 11. Exception:** Case information did not feed to Producer Directory. Aetna Medicare Broker Services will manually review and correct issue or reject the case.
- 12. Onboarded Completed (Onboard Complete):** Case has successfully been completed.

# Process Reminder

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>



**Thank you for partnering with Aetna**

**We hope you are as excited about these updated changes  
as we are.**





**For questions about Medicare Advantage application status, appointments, certification, commission, contracting and license status call the Aetna Medicare Broker Services Department at 1-866-714-9301. Your calls and emails can be answered Monday through Friday 8 a.m. – 8 p.m. ET. Their email address is [brokersupport@aetna.com](mailto:brokersupport@aetna.com)**