Aetna Quote and Enroll

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

Significant Features

Multiple products under one umbrella
Following senior supplemental products are available on Aetna Quote & Enroll
- Medicare Supplement (Aetna companies and Accendo)
- Final Expense (Protection Series product and Accendo)
- Protection Series℠
  - Cancer Insurance
  - Dental, Vision and Hearing Plus
  - Dental, Vision and Hearing
  - Heart Attack or Stroke Insurance
  - Home Care Plus
  - Hospital Indemnity/Flex
  - Home Recovery Care
  - Recovery Care

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

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

Shopping Cart – Price multiple products and add them to the cart to start enrollment
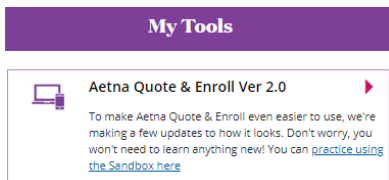
Product specific guidance –You will see specific sections based on the product selected for applicant(s).

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

Multiple signature options – Get the applications signed in and submitted at your ease using our multiple signature options
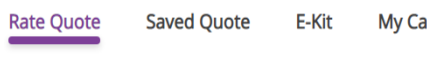
One submission – for multiple product applications / applicant(s). Processing starts immediately on submission

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

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

Application will launch in a new window.
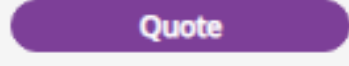
Rate Quote   Saved Quote   E-Kit   My Ca

From the landing page of the eApp, you can -

- Quote

- Start enrollment

- Send eKits

- Mange your cases

View Products

Quote

Add to Cart

Start enrollment

Rate Quote

Enter zip code, state will be auto populated, enter date of birth, select Gender and tobacco indicator
Click on **View Products**
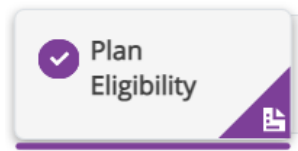You can enter Applicant A and Applicant B details together if there are 2 applicants

- You will be able to select products available in the selected state.

- Select the product and update the inputs for the quote and click on "Quote"

- After the rates are displayed, select the requiredplan / rider and click on "Add to cart".

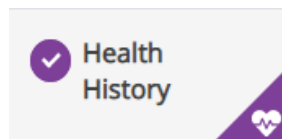Save Quote or Start enrollment

- To save quote for future use, click on "save"

- To start enrollment, click on "Start enrollment"

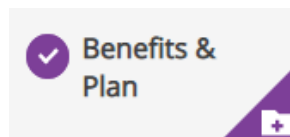Enrollment process starts with providing Applicant Name, Date of birth and Legal resident details.

Plan eligibility

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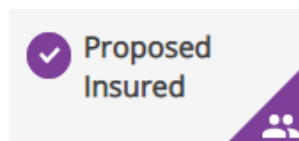
Health history

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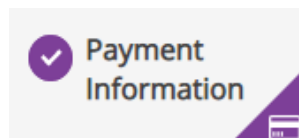- Add more - click on "add more" to add more prescription information

Benefits and plan

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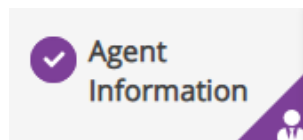- Requote - if effective date or plan benefits are changed, requote the application

Proposed insured

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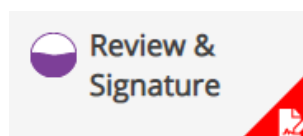
Payment information

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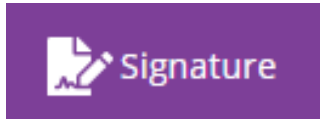
Agent information

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

Review and signature

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

Signature **process**

In- person signature

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

Security question signature

- Allows to sign by answering the security question

Email signature

- Send application through email

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