

# Existing Broker that is Licensed and Appointed for Commercial

08/24/21

# General Broker Requirements to Sell

## Requirements to Sell ACA Individual:

1. Brokers must be licensed and appointed by Aetna.
  - Brokers must have an active *commercial appointment* with Aetna in each state of sale.
2. Brokers must be FFM (Federally Facilitated Marketplace) Certified for 2022 (Nevada brokers must be SBE (state-based exchange) certified).
  - Brokers wanting to be FFM certified should be directed to <https://portal.cms.gov>
  - For Nevada brokers wanting to be SBE certified should be directed to <https://www.nevadahealthlink.com/partner-resources/brokers-agents/>
3. Brokers must complete an ACA Individual Compensation Request form in Producer World.
  - This form tells Aetna how the broker wants to be paid commissions. Brokers will have the opportunity to select one of our contracted General Agents as their upline.

**Special Note - Brokers will need to enter the GA TIN to select their GA upline now through 9/17. The general agency name will not appear in the drop down until 9/17/21.**

# Compensation Payee Assignment by Broker

# Compensation Payee Assignment by Broker Overview

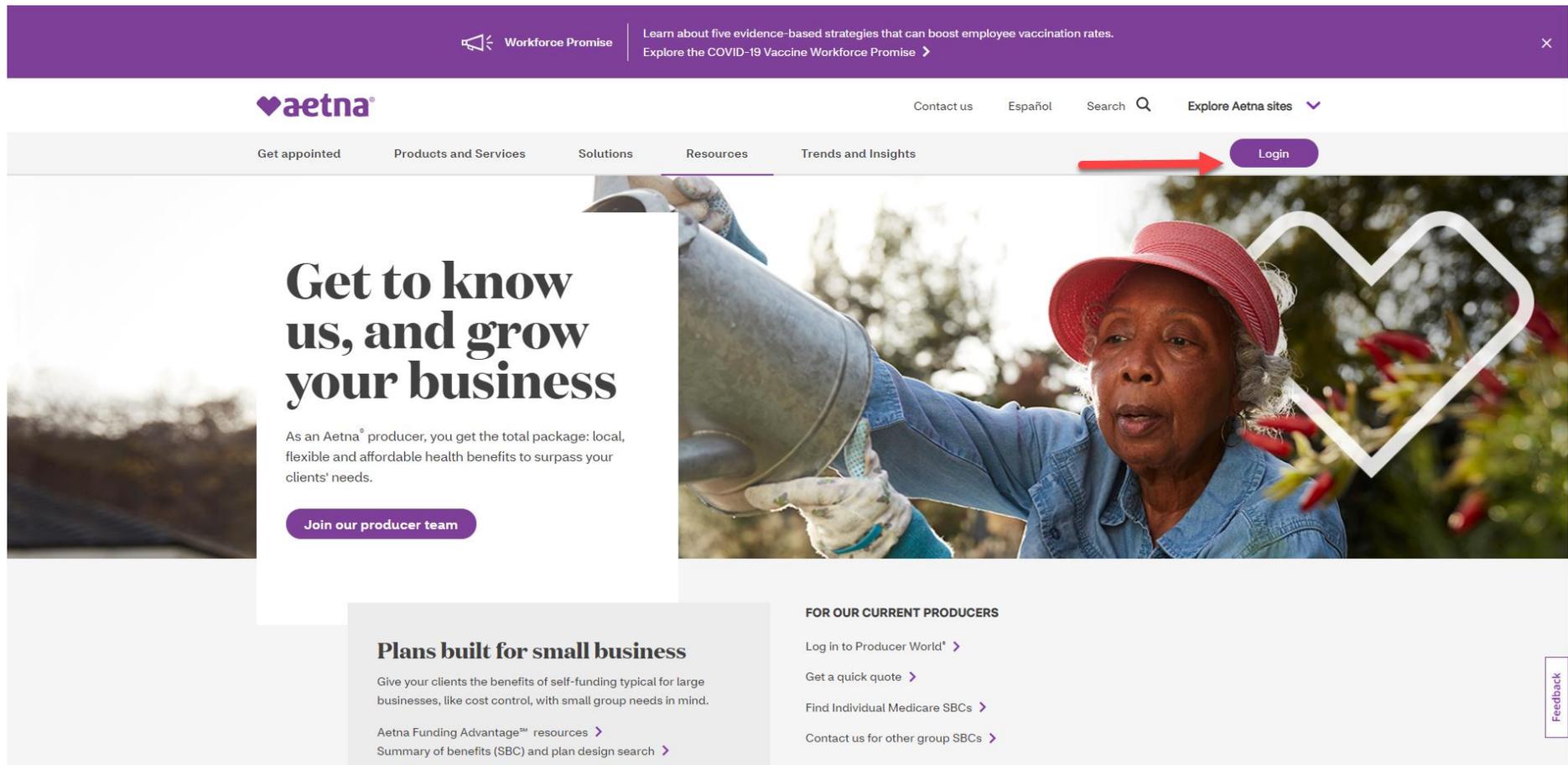
## Once Brokers are Ready to Sell:

1. Existing Brokers must complete an ACA Individual Compensation Request form in Producer World.
2. This form directs the broker on how to assign commission and is required.
3. Brokers will have the following two options to assign commissions:
  - Assign commissions to themselves
  - Assign commissions to an agency
4. After completing the individual compensation request, brokers can select one of our contracted General Agents as their upline.
  - A general agent can be selected by inputting their tax identification number until 9/17/2021.
  - **Special Note – On 9/17/21 general agents will be selected via a drop-down box.**

**Additional Notes:** If a broker assigns their commission to an agency, the principal of that agency **MUST** assign the general agent relationship in Producer World; this field will then be pre-populated for the broker, and they will not be able to make a change.

# Compensation Payee Assignment by Broker

- Existing Brokers can complete an ACA Individual Compensation Request in Producer World by navigate to *Aetna.com*
- Select *For Brokers and Agents* under *Explore Aetna Sites*
- Then Select *Login*



# Compensation Payee Assignment by Broker

- Existing Brokers will need to enter in their **USERNAME** and **PASSWORD**
  - If broker has forgotten **user name** and **password** then they can click on the **Forgot your user name or password?** feature
- Then Select **Log in to Producer World**

Who we are Initiatives Investors Health section [Login](#)

## Select your role to login

Member

[Agents/Brokers >](#)

Employer

Medical Provider

Dental Provider

### AGENTS/BROKERS LOGIN

Get quotes, find compensation information, access reports and more.

USERNAME

PASSWORD

[Log in to Producer World®](#)

[Forgot your user name or password?](#)

### DON'T HAVE AN ACCOUNT?

Become an insider. Register today to access smart tools and resources to grow your business.

[Register for Producer World®](#)

# Compensation Payee Assignment by Broker

Broker will need to click on the *Individual* tab at the top of the page

Accessibility Services | Contact us | Log out

Home **Individual** Small Group Middle Market National, PEO, P&L Group Medicare Individual Medicare Joint Ventures

Welcome 08/25/2021

**Producer World**

**Products** ▾  
Find the right plan  
Quote / Renewal  
Enrollment / Billing  
Forms  
Tools & apps  
Compensation  
Book of business  
Medicare reports  
License and appointment  
Manage personal/firm information ▾  
Manage access for others  
Find a provider  
Find a medication  
Compliance  
Contact us / Help

**You can't afford not to have affordable health care**

**Coming soon:** ACA individual health insurance plans

[Learn more](#)

**Get a first look at 2022 MA/MAPD and PDP products.**

**COVID-19 resources**

- [Learn more about the COVID-19 Vaccine Workforce Promise.](#)
- [Keep up to date on Coronavirus news, resources and updates.](#)
- [Ask your Aetna account team about a customized COVID-19 vaccine toolkit for your clients that can be shared with employees.](#)

**Message Center**

Ascend will be down every Monday and Wednesday at 11:30PM EST – 2AM EST for system updates.

Attention Medicare producers: Effective 5/10 a password reset is required on the Aetna certification site.

[Compensation check run schedules](#)

[Get health news and insights](#)

[Producer news](#)

[Healthcare.gov: Plan Year 2021 Registration and Training](#)

**Help**

**We're Here to Assist You**

Three ways for you to find the answers you're looking for: Find self-help information, call or email us. [Learn more](#)

**Update Address and Email**

Please update your personal & firm information **address** and **email** to receive important correspondence from us.

Print Email Bookmark/Share

# Compensation Payee Assignment by Broker

Broker will need to click on the *Ready to sell* tab in the middle of the page

The screenshot shows the Aetna website interface. At the top, there is a navigation bar with links for Accessibility Services, Contact us, Log out, and a search bar. Below this is a secondary navigation bar with links for Home, Individual, Small Group, Middle Market, National, PEO, P&L, Group Medicare, Individual Medicare, and Joint Ventures. The main content area features the Aetna logo and the heading 'Individual and family medical plans'. A sidebar on the left contains a 'Products' dropdown menu with various options like 'Find the right plan', 'Quote / Renewal', 'Enrollment / Billing', etc. The main content area has a 'Value' section with text about unique care options and a photo of a family. Below this is a navigation bar with tabs: Overview, Ready to sell (highlighted with a red arrow), Products & plans, Quote & enroll, Compensation, and Contact us. The 'Ready to sell' tab is active, showing a section titled 'Are you ready to sell Aetna CVS Health™ ACA marketplace individual and family plans?' with a 'Quick links' dropdown. Below this is a map of the United States highlighting available regions (NV, TX, NC, MO, GA, FL, VA, AZ) and a list of cities for each region. The 'Start selling!' section provides information about broker toolkits, and the 'We're here to help' section provides contact information for questions.

# Compensation Payee Assignment by Broker

Broker will then need to go to Step 3 in order to assign their commissions and establish their General Agent relationship if applicable

Accessibility Services | Contact us | Log out | Enter search text

Home Individual Small Group Middle Market National, PEO, P&L Group Medicare Individual Medicare Joint Ventures

Producer World Home \ Medical plans for individuals and families

**aetna** Individual and family medical plans

Products  
Find the right plan  
Quote / Renewal  
Enrollment / Billing  
Forms  
Tools & apps  
Compensation  
Book of business  
Medicare reports  
License and appointment  
Manage personal/firm information  
Manage access for others  
Find a provider  
Find a medication  
Compliance  
Contact us / Help

New individual and family ACA plans available in select markets for 2022.

Overview **Ready to sell** Products & plans Quote & enroll Compensation Contact us

### Ready to Sell

**Step 1: Brokers who want to sell Aetna CVS Health<sup>®</sup>,<sup>®</sup> ACA marketplace individual and family plans must be licensed and appointed.**  
Brokers must be both licensed and appointed as applicable in the state of sale. (Note: Your appointment must be active where required by state law or "on hold for sale".) Broker must also have a signed attestation to the producer agreement on file.

**If you are already appointed to sell Aetna's commercial products proceed to step 2. If not, get appointed to sell commercial products.**

**Step 2: Brokers who wish to sell ACA marketplace products must hold Federally-Facilitated Marketplace (FFM) certification or state certification in Nevada, if applicable.**

- Get FFM certified or
- Get state certified for Nevada, if applicable.

**Step 3: Brokers selling Aetna CVS Health<sup>®</sup>,<sup>®</sup> ACA marketplace individual and family plans must assign commission payments to themselves or to an agency.**  
Select how your commissions should be paid.

- If commissions go to you, assign a general agent relationship
- If commissions go to an agency, assign commission

Please note the wording on this tab will change

# Compensation Payee Assignment by Broker

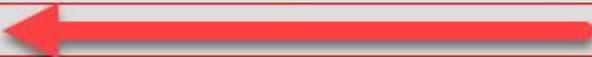
Broker will then start the process of assigning their commissions by clicking on *Compensation Payee*



## Individual & family plans requirement to sell

Complete required sections below for selling individual & family plans

Compensation Payee
General Agents
Your Federal Certification
Your State Certification



Start selling

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Feedback

# Compensation Payee Assignment by Broker

Broker will need to assign their commissions to themselves by clicking on *I want my commissions to be paid to myself* or to an agency by clicking on *I want my commissions to be paid to an agency*



Individual & family plans requirement to sell

Complete required sections below for selling individual & family plans

Compensation Payee

Please select your choice below to assign new Compensation Payee

I want my commissions to be paid myself

I want commissions to be paid to agency

Cancel

General Agents

Your Federal Certification

Your State Certification

A large, thick red arrow pointing from the right side of the screen towards the "I want my commissions to be paid myself" button.

# Compensation Payee Assignment by Broker

- If the broker assigns their commissions to themselves, broker will need to check the *I Accept & Sign* box
- Choose the date for the *start date* for commissions to be paid
  - Please note that date must be in the future and can not be back dated
- Click on the *Submit* button

Individual and family plans: Requirements to sell

Complete the required sections below

**Commission assignment**

You selected: **I want my commissions to be paid myself**

**Disclaimer**

By signing below, you acknowledge that

- You will be removed from your current agency and payments will be directed to you.
- You will need to remit an updated W-9> and ensure your EFT information is current.

I Accept & Sign

New assigned commission payee: **IVLTestBrkFN60 IVLTestBrkLN60**

Choose start date:  

General agents

Feedback

# Broker Compensation Payee Overview

- If the broker assigns their commissions to an agency, broker will need to check the *I Accept & Sign* box
- Choose the date for the *start date* for commissions to be paid
  - Please note that date must be in the future and can not be back dated
- The broker will then need to enter the *New assigned commission payee tax id*
- Click on the *Submit* button

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You selected: **I want commissions to be paid to an agency**

**Disclaimer**

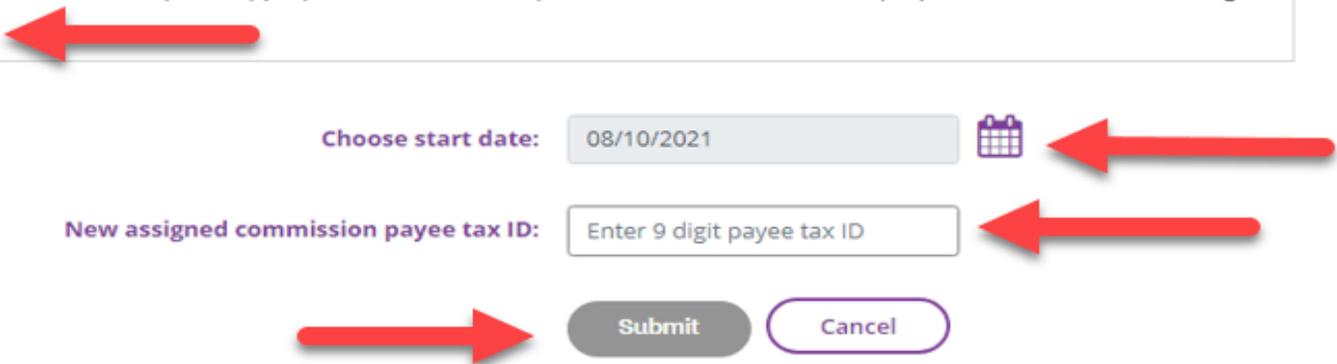
By signing below, the assignee certifies to Aetna  
(1) that the assignor is a true employee of the assignee (or that the assignor is a partner of the assignee if the assignee is a partnership),  
(2) that the assignor is required to assign all commissions to the assignee as a condition of employment and  
(3) that because of such relationship, it is appropriate for Aetna to report such commissions for tax purposes as income of the assignee.

I Accept & Sign

Choose start date: 08/10/2021 

New assigned commission payee tax ID: Enter 9 digit payee tax ID

**Submit** **Cancel**



# General Agency Assignment

# General Agency Assignment

After completing the individual compensation request, brokers can select one of our contracted General Agents as their upline (if applicable)



## Individual and family plans: Requirements to sell

Update commission assignment, if applicable, to ensure commissions are paid accurately. Review remaining optional sections.

<a href="#">Commission assignment</a>
<a href="#">General agents</a> 
<a href="#">Federal Facilitated Marketplace certification (FFM)</a>
<a href="#">State-based exchange certifications</a>

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# General Agency Assignment

- Brokers can review who they have assigned as their GA here by *state*, *start date* and *expiration date* completing the individual compensation request, brokers can select one of our contracted General Agents as their upline (if applicable)
- If broker need to add a General Agent, they need to click on *Add new*



## Individual and family plans: Requirements to sell

Update commission assignment, if applicable, to ensure commissions are paid accurately. Review remaining optional sections.

Commission assignment

General agents

+ Add new

General agent	State	Start date	Expiration date
TestIVLDemo_Firm11	Missouri	06/19/2018	06/17/2021
TestIVLDemo_Firm11	Nevada	07/03/2021	07/26/2021
TestIVLDemo_Firm11	North Carolina	06/18/2021	07/02/2021

Showing 1 to 3 of 3 entries

We're here to help, contact us.

Federal Facilitated Marketplace certification (FFM)

State-based exchange certifications

# General Agency Assignment Process

- Brokers will need to select *Contact state*
  - This will need to be done for each state that there is a relationship in
- Broker will then choose the *Contract start date*
  - Please note that date must be in the future and can not be back dated
- General agencies can be selected by inputting their tax identification number until 9.17.21 or by using the eye glass icon.
  - Note: On 9.17 general agencies will be selected via a drop down box.
- Click *Submit*

## Individual and family plans: Requirements to sell

Update commission assignment, if applicable, to ensure commissions are paid accurately. Review remaining optional sections.

### Commission assignment

#### General agents

General agent	State	Start date	Expiration date
Test\VLDemo_Firm11	Missouri	06/19/2018	06/17/2021
Test\VLDemo_Firm11	Nevada	07/03/2021	07/26/2021
Test\VLDemo_Firm11	North Carolina	06/18/2021	07/02/2021

Showing 1 to 3 of 3 entries

Please select contract state, start date and general agent tax ID and hit search to find general agent

Contract state:   ←

Contract start date:   ←

General agent tax ID:   →

Submit Cancel →

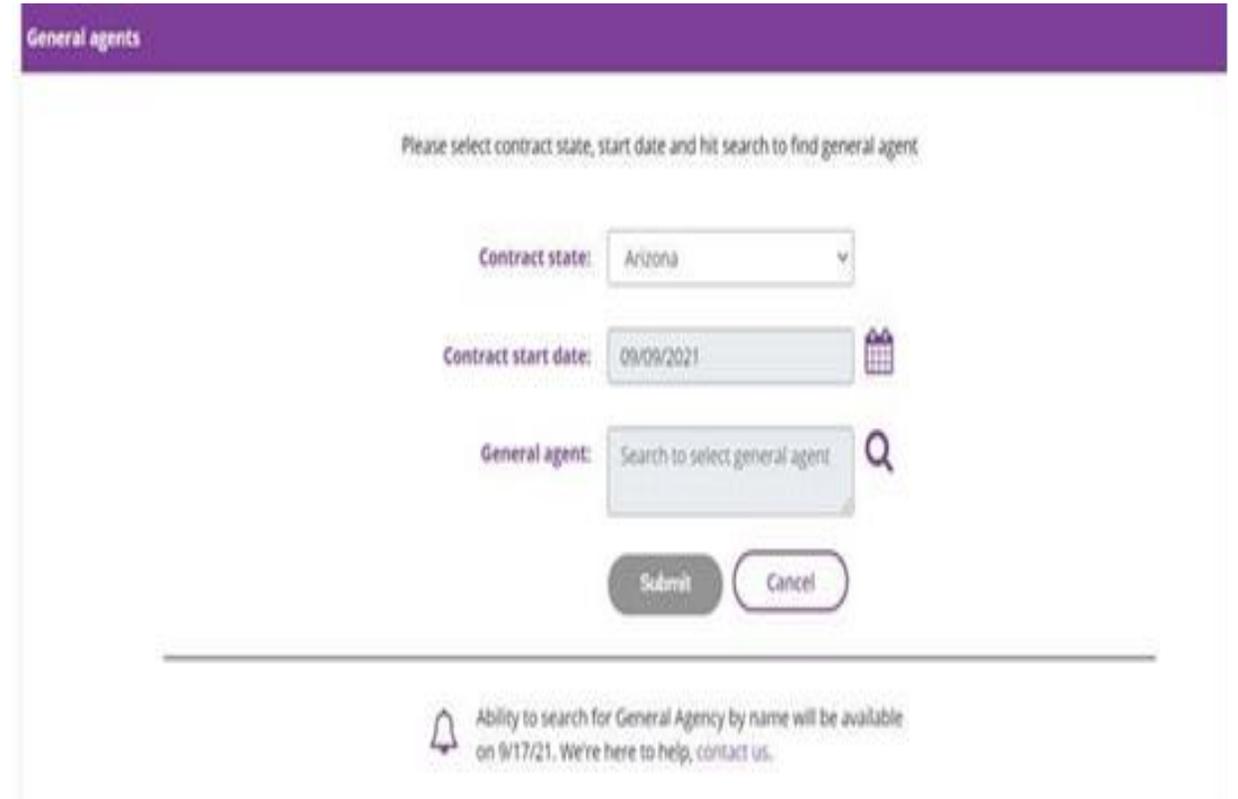
 We're here to help, contact us.

Federal Facilitated Marketplace certification (FFM)

State-based exchange certifications

# General Agency Assignment Process (effective 9/17)

- Brokers will need to select *Contact state*
  - This will need to be done for each state that there is a relationship in
- Broker will then choose the *Contract start date*
  - Please note that date must be in the future and can not be back dated
- General Agent can be selected by either typing in GA name or by using the eye glass icon.
- Click *Submit*



The screenshot shows a web form titled "General agents" with a purple header. Below the header, there is a prompt: "Please select contract state, start date and hit search to find general agent". The form contains three input fields: "Contract state:" with a dropdown menu showing "Arizona", "Contract start date:" with a date field showing "09/09/2021" and a calendar icon, and "General agent:" with a search field containing the text "Search to select general agent" and a magnifying glass icon. At the bottom of the form are two buttons: "Submit" and "Cancel". Below the form, there is a horizontal line and a notification bell icon with the text: "Ability to search for General Agency by name will be available on 9/17/21. We're here to help, contact us."

# Federal Facilitated Marketplace and State Base Certification

# Federal Facilitated Marketplace certification(FFM)

Brokers can select the *Federal Facilitated Marketplace certification(FFM)* for more information and at a later date can upload their FFM certification



## Individual and family plans: Requirements to sell

Update commission assignment, if applicable, to ensure commissions are paid accurately. Review remaining optional sections.

Commission assignment

General agents

Federal Facilitated Marketplace certification (FFM)

State-based exchange certifications



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# Federal Facilitated Marketplace certification(FFM)

Brokers can select the *Get FFM certified* to be directed to the CMS.gov site more information about FFM certification

## Individual and family plans: Requirements to sell

Update commission assignment, if applicable, to ensure commissions are paid accurately. Review remaining optional sections.

**Commission assignment**

**General agents**

**Federal Facilitated Marketplace certification (FFM)**

Brokers who wish to sell on exchange marketplace products must be certified by the Federally-facilitated marketplace (FFM).

- [Get FFM certified](#)
- Check back soon for ability to upload your 2022 certification

**State-based exchange certifications**



# State-based exchange certification

Brokers can select the *State-based exchange certification* for more information and at a later date can upload their State certification



## Individual and family plans: Requirements to sell

Update commission assignment, if applicable, to ensure commissions are paid accurately. Review remaining optional sections.

Commission assignment
General agents
Federal Facilitated Marketplace certification (FFM)
State-based exchange certifications



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# State-based exchange certification

Brokers can select the *Get state certified for Nevada* to be directed to the nevadahealthlink.com site more information about State certification

## Individual and family plans: Requirements to sell

Update commission assignment, if applicable, to ensure commissions are paid accurately. Review remaining optional sections.

### Commission assignment

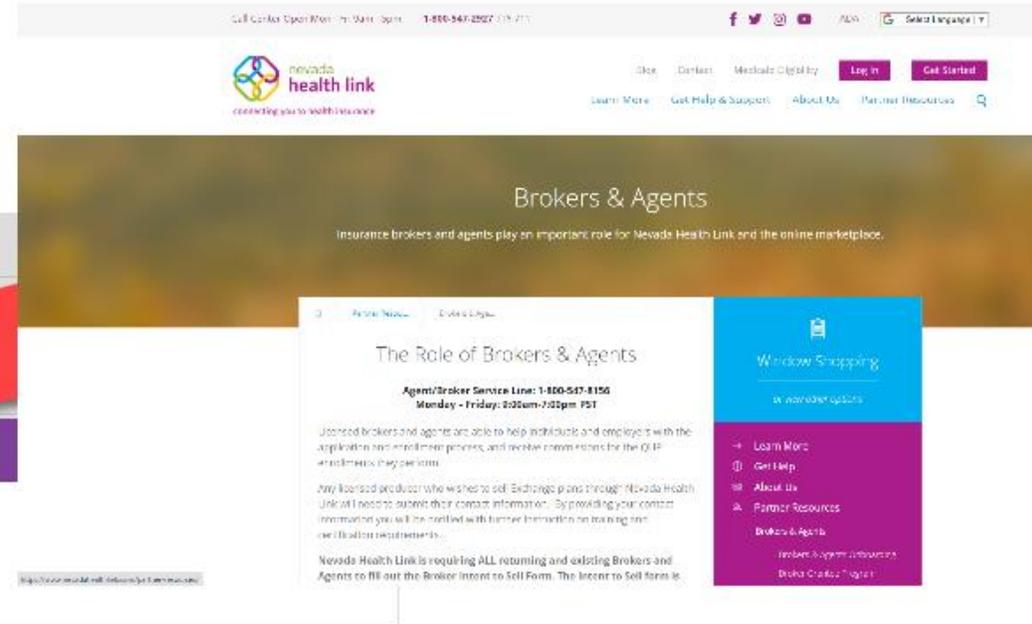
### General agents

### Federal Facilitated Marketplace certification (FFM)

### State-based exchange certifications

Brokers who wish to sell on exchange marketplace products in Nevada must be state certified.

- Get state certified for Nevada
- Check back soon for ability to upload your 2022 certification



# How to Submit Licensing and Certification Information

# How to Submit Licensing and Certification Information

1. Existing Brokers can submit licensing and certification information using Producer World by navigate to [Aetna.com](https://www.aetna.com)
2. Select *For Brokers and Agents* under *Explore Aetna Sites*
3. Then Logging into Producer World
4. Broker then can click on the *License and appointment* in the menu options

The screenshot shows the Aetna Producer World website. At the top, there is a navigation bar with links for Home, Individual, Small Group, Middle Market, National, PEO, P&L, Group Medicare, Individual Medicare, and Joint Ventures. Below the navigation bar, the Aetna logo is displayed, followed by the text "Welcome" and the date "08/25/2021". The main heading is "Producer World". On the left side, there is a vertical menu with the following items: Products, Find the right plan, Quote / Renewal, Enrollment / Billing, Forms, Tools & apps, Compensation, Book of business, Medicare reports, License and appointment, Manage personal/firm information, Manage access for others, Find a provider, Find a medication, Compliance, and Contact us / Help. A red arrow points to the "License and appointment" menu item. To the right of the menu, there is a promotional banner for "You can't afford not to have affordable health care" with a "Learn more" button. Below the banner, there is a section for "COVID-19 resources" with three bullet points. At the bottom of the page, there are three columns: "Message Center" with various notices and links, "Help" with a "We're Here to Assist You" message, and "Update Address and Email" with a request to update contact information. At the very bottom, there are icons for Print, Email, and Bookmark/Share.

# How to Submit Licensing and Certification Information

Existing Brokers should click on the *contact us* feature at the bottom of the page

Accessibility Services | Contact us | Log out

Home Individual Small Group Middle Market National, PEO, P&L Group Medicare Individual Medicare Joint Ventures

Producer World Home \ License and Appointment

## License and Appointment

- Products
- Find the right plan
- Quote / Renewal
- Enrollment / Billing
- Forms
- Tools & apps
- Compensation
- Book of business
- Medicare reports
- License and appointment
- Manage personal/firm information
- Manage access for others
- Find a provider
- Find a medication
- Compliance
- Contact us / Help

**Personal/Firm L&A** Licensing & Appt look up for general agents Become appointed Help

### Personal/Firm L&A

[View Personal/Firm L&A](#)

The License & Appointment tool gives you a view of your personal license and appointment information. The information displayed will include:

- all states in which licensing information is available
- a confidential data sheet (CDS) along with the date it was signed
- any established relationships you may have
- And much more

#### Expired License?

- If you are unable to access this tool, your license may be expired or your relationship may be terminated with us, please [contact us](#) to resolve the issue.
- If you have an updated license which you'd like to file with us, use our [contact us form](#) to attach it and it will arrive directly to the License & Appointment department.



 Print  Email  Bookmark/Share

# How to Submit Licensing and Certification Information

- Existing Brokers will then need to complete the Contact form
  - Special Note: Broker should include their NPN on the form and include a brief description of the documents being sent
- Broker then can select the *Choose File* to upload the licensing and certification Information

Producer World Home \ Contact us

**aetna** Contact us

Products

- Find the right plan
- Quote / Renewal
- Enrollment / Billing
- Forms
- Tools & apps
- Compensation
- Book of business
- Medicare reports
- License and appointment
- Manage personal/firm information
- Manage access for others
- Find a provider
- Find a medication
- Compliance
- Contact us / Help

We're here to assist you

Three ways to assist you find the answers you are looking for -- Find helpful information, call us or email us.

Helpful information Call us **Contact form**

**Contact form**

Please use this page to submit a request for assistance or for more information. Required fields are notated with a red asterisk (\*).

**Make address, phone and email updates online.**

**Producer details**

\*Name:  
Ex. Jane Doe

National Producer Number (NPN):  
Ex. 0123456

Firm name:  
Ex. Doe Insurance Agency

\*Email address:  
Ex. example@domain.com

Phone number:  
Ex. 555-555-5555

**Inquiry details**

Please select the state and segment you are inquiring about and provide a detailed message so we can better assist you.

\*State you are inquiring about:  
Select a state

\*Segment:  
Select a market segment

\*Enter your message/issue:  
Please provide details to expedite your request (i.e. TIN, Group/Control #, Claims, Member Materials, Benefits, etc.)  
Ex. I am inquiring about my clients bill.

Add attachment below (if applicable):  
Note: multiple files or files larger than **1MB** should be zipped prior to submitting.  
**Choose File** No file chosen

Submit Reset