

Think Agent User Guide



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Getting started with Think Agent



What is Think Agent?

Think Agent is platform that helps Medicare Sales Agents manage their Sales and Marketing activity. This virtual office for Agents will supplement sales efforts through:

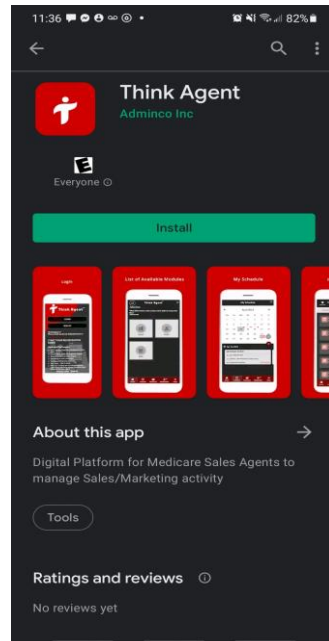
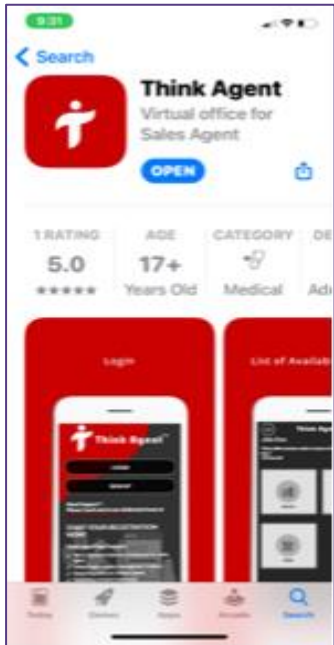
- Activity Calendar
- Notification
- Member Enrollment
- HRA
- Virtual E-kits
- Lead Management
- Event Requests and Updates
- Automated Event Check-in
- Resource Center – for download of supplementary Sales and Marketing related documents.
- Communicate with Prospect
- + More

This Platform is for the Medicare Sales Agent - Designed with a vision to provide one-stop shop solution. This platform is backed by a dedicated support team that assists Agents to receive timely responses through a monitored email. support@thinkagent.com

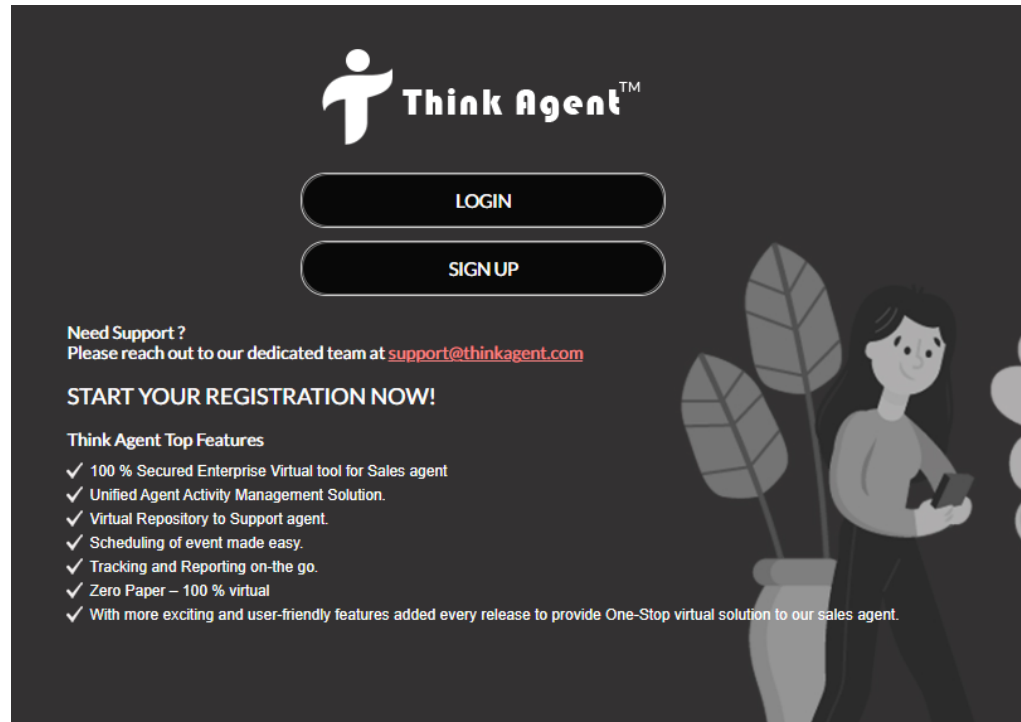
Installing Think Agent

For mobile device, Think Agent is available for download in your device app store!

- Android 5 or greater, version 11
- IOS: 11.0 or greater, version 14.5



On desktop devices, you can access Think Agent through this link:
<https://app.thinkagent.com>



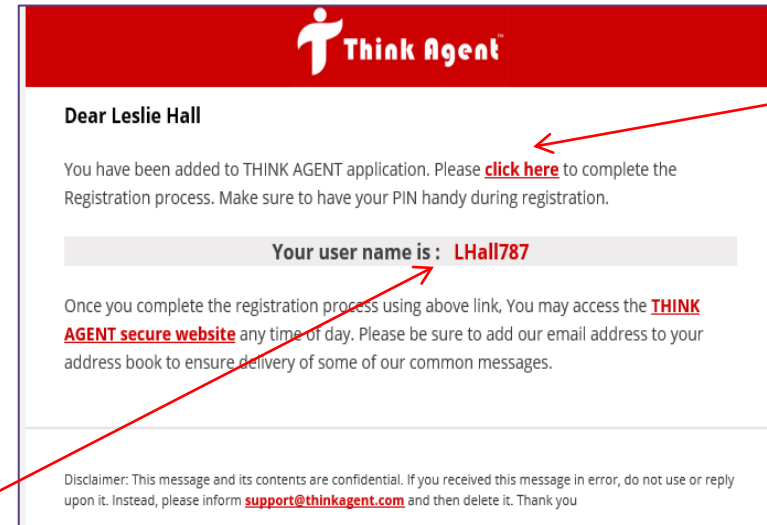
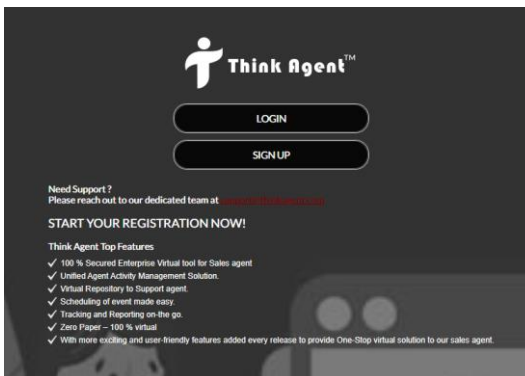
How do I request Think Agent access?

You can download the app from your device App Store, select **Sign Up** or simply send an email to support@thinkagent.com.

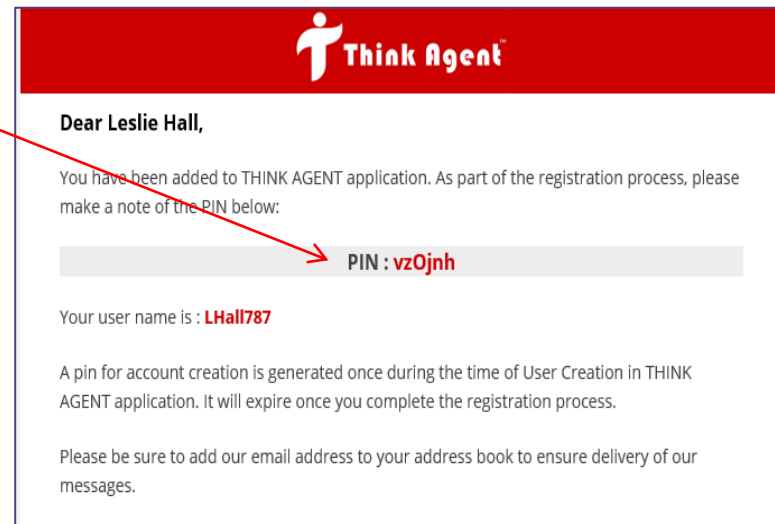
Please provide:

- Name
- Email Address
- NPN
- Time zone

Once access is granted, you will receive two emails from: communication@email.thinkagent.com One email will contain your **username** and the second will contain your registration **PIN**. You will need both in order to set up your Think Agent account.



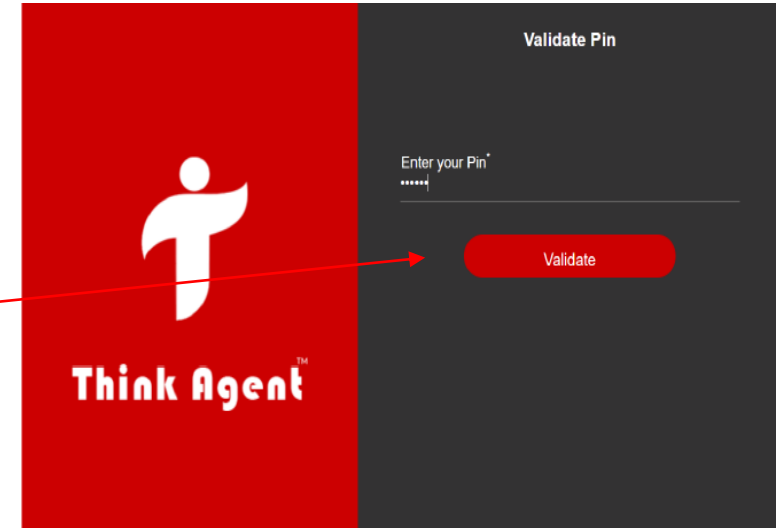
Please click on “Click Here” to begin the registration process.



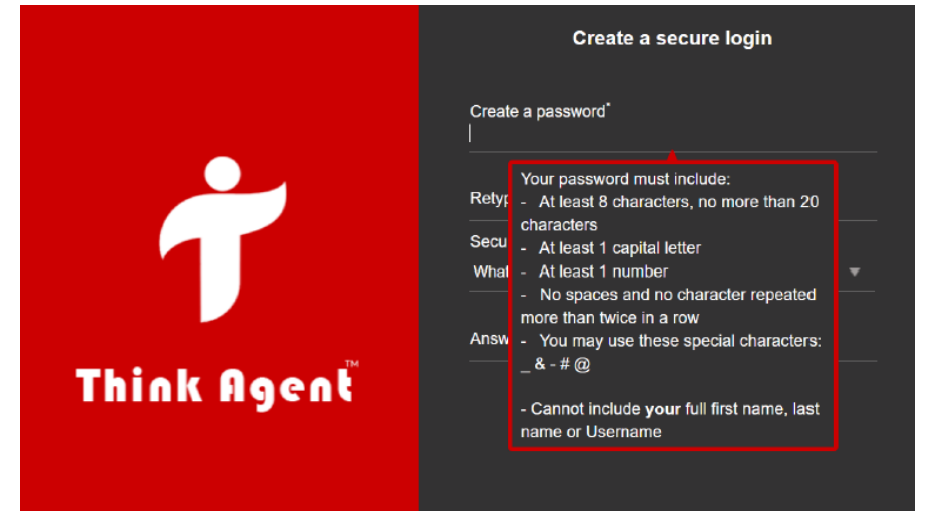
Your PIN is case sensitive. You will only use your PIN one time and just for registration.

Setting up your Think Agent account

Once you select “Click Here” on the registration email, you will be taken to the **PIN** validation page. Your PIN is case sensitive, so you will want to enter it exactly as it is shown. Click Validate.



Next, you will create a password and choose a security question from the drop-down selection. You will type in the answer to your security question and click Submit.



Setting up your Think Agent account

Upon set-up, you will receive an email from Think Agent advising that Think Agent is now available for use.

Please reach out to support@thinkagent.com for assistance with registering, logging in, reporting, event check-in issues and for any feedback.

Your account in THINK AGENT, is now available for your use. Please do not share your account credentials with others.

Validate: How to activate your account

If you have already validated your account using an auto-generated PIN, you are ready to log in. If not, please look for previously sent emails:

If you have not yet completed your registration, we invite you to please do so now. Didn't get these emails? Check your junk, Spam, or other folders for emails from communication@email.thinkagent.com sent on the same date as this email. Once registration is completed please login to <https://app.thinkagent.com> and enter your user id and password.

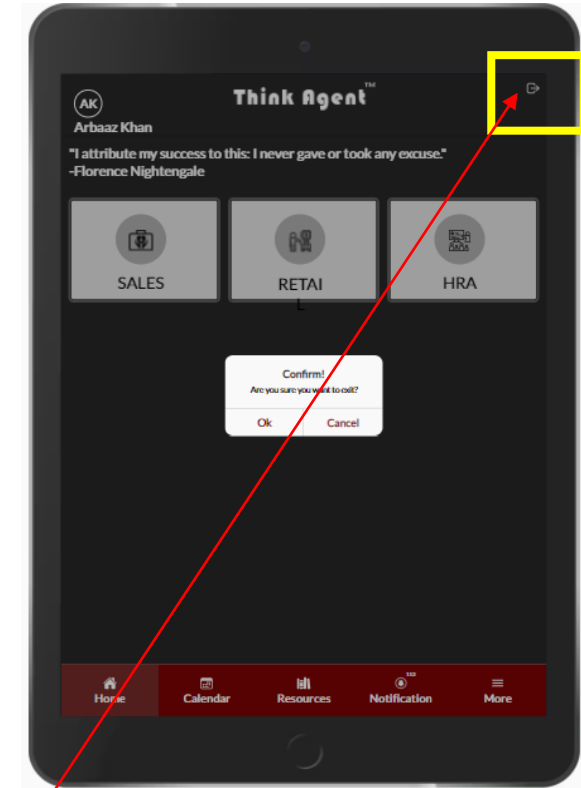
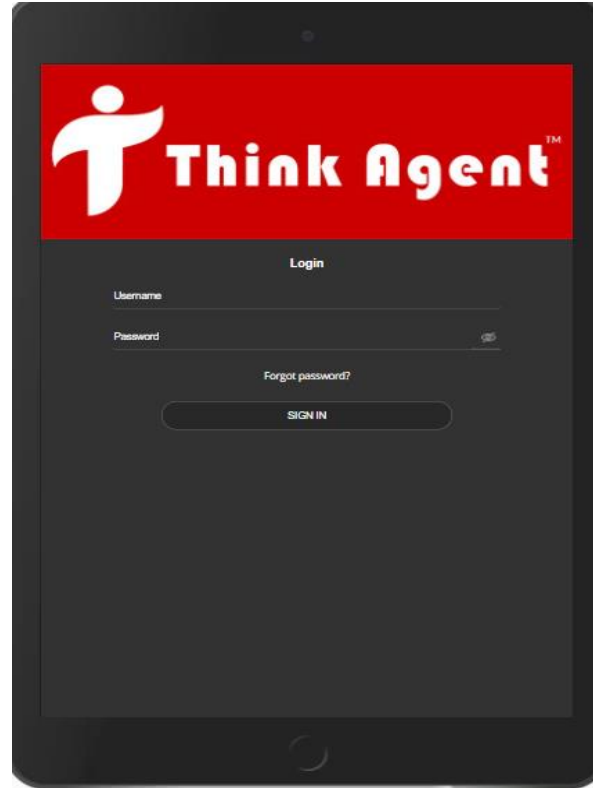
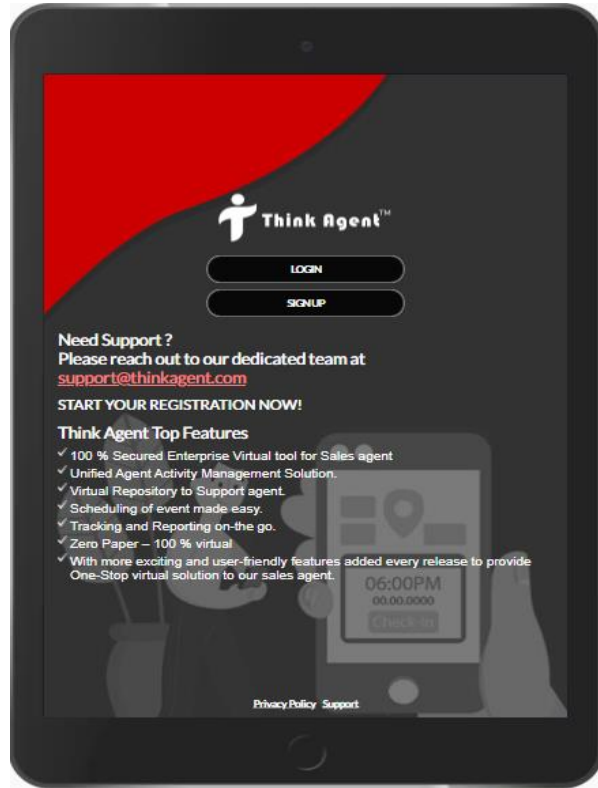
Feedback: Help shape our data-driven future

Please share feedback and enhancement ideas at support@thinkagent.com. We are building a mobile platform that will help agent to manage their sales activity anytime and anywhere. Your ideas will shape the evolution of THINK AGENT. This is just the beginning of a broader and deeper vision. THINK AGENT is the future of managing your sales activity from your phone – Our goal is to help our sales agent capitalize every member interaction opportunity, so let's dive into future - Login now! <https://app.thinkagent.com>

Sincerely,
Think Agent - Medicare Sales Strategy Solution

Disclaimer: This message and its contents are confidential. If you received this message in error, do not use or reply upon it. Instead, please inform support@thinkagent.com and then delete it. Thank you

Log-in/out of Think Agent App



To log into Think Agent, select **Login**, enter your **Username** and **Password**. Select **Sign In**.
If you have forgotten your password, select **Forgot Password** to reset. You will need to answer your security question.
To log out of Think Agent, select the **Exit** icon and confirm you want to exit the application.

Where to go for help?

support@thinkagent.com

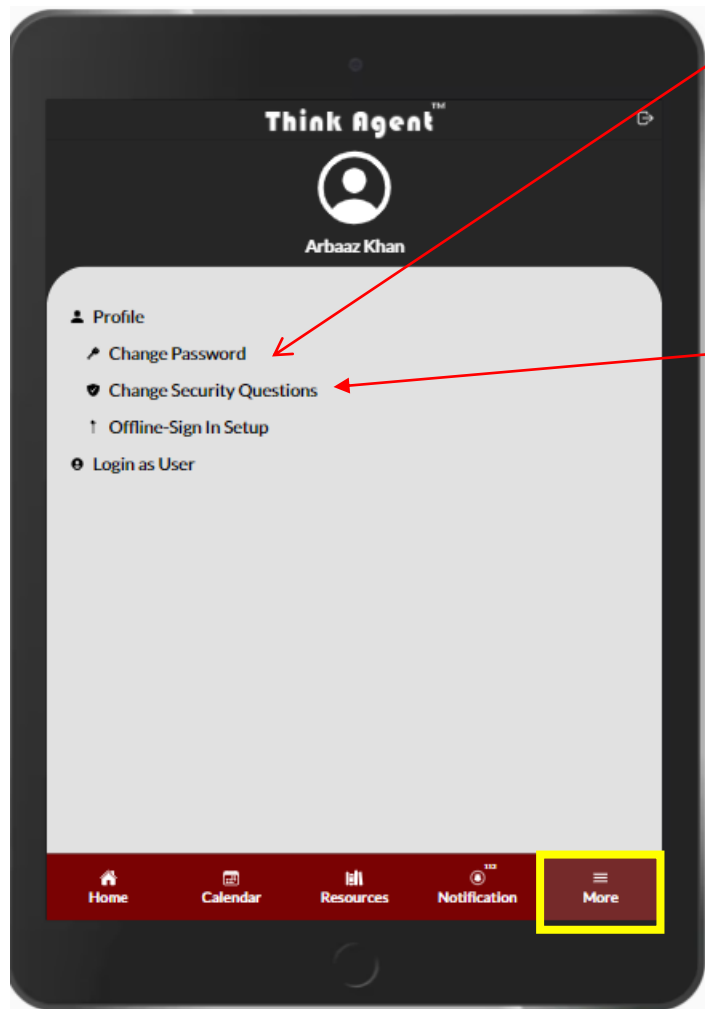
The Think Agent platform is backed by a dedicated support team that provides agents with timely responses to all inquiries. Need some help logging in, requesting or cancelling an event? The Think Agent team is standing by to assist!



My Think Agent Settings



Changing Password and Security Questions



To change your Password, select **More** on the bottom of the screen. Next, click **Change Password** and follow the prompts below. **Save** your changes.

You can also change your Security Questions at any time!

You must enter your current password to change it.

Current password

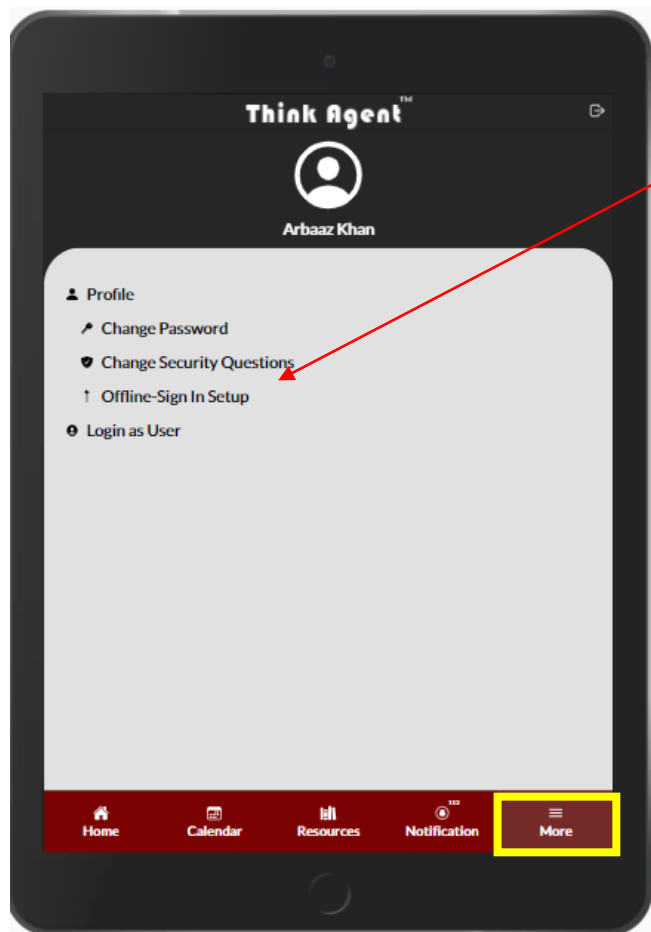
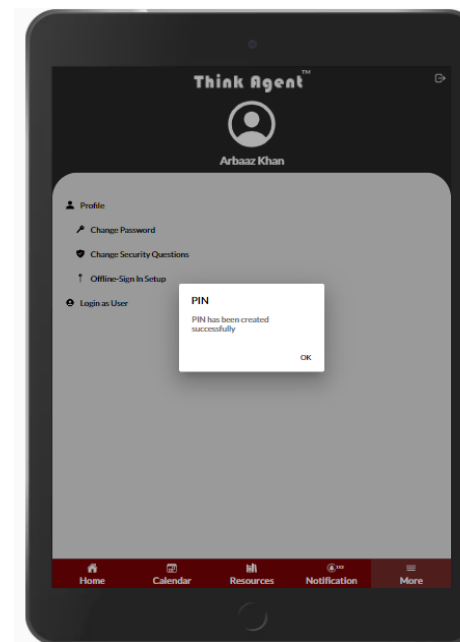
New password

Confirm new password

Working Offline: In places where there is limited or no internet connection

Did you know that you can complete an enrollment offline? You can in Think Agent!

First, you will click the **More** tab at the bottom of the screen. Next you will select **Offline-Sign In Setup**. You will be prompted to create a **PIN** number and you will receive confirmation once there has been successful PIN generation. You are now set up of Offline capabilities.

A screenshot of the 'Create a PIN' screen. It has a dark background with white text. The title is 'Create a PIN'. Below it, there are two sections: 'Enter 4 digit Pin*' and 'Confirm Pin*'. Each section contains four white input boxes for digits. At the bottom, there is a red 'SUBMIT' button.

Log In Offline

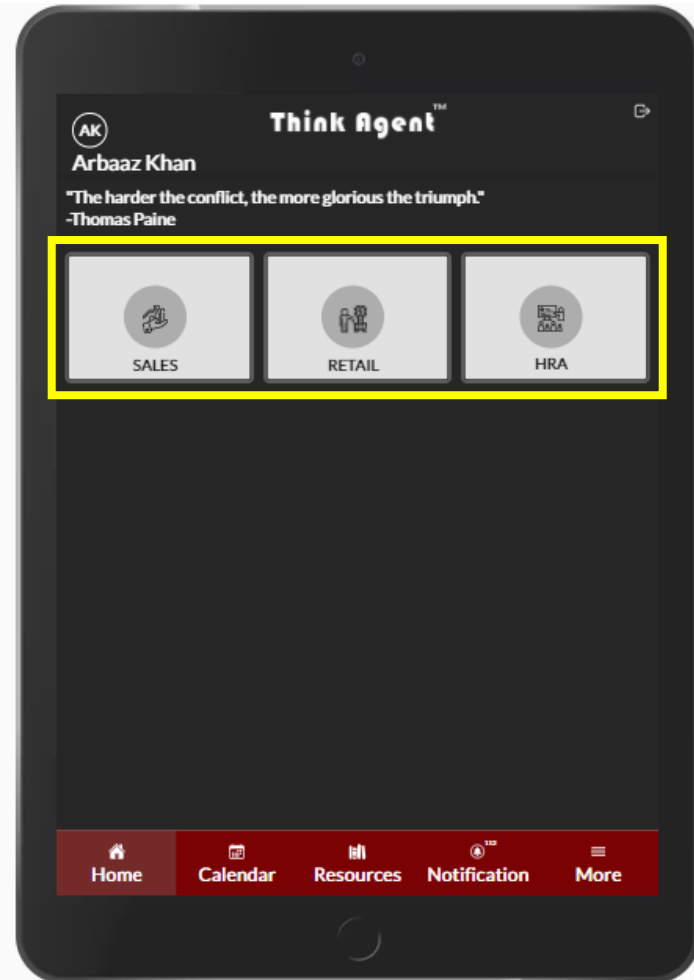
When no internet connection is available, to log in offline, select **Offline Log In**. You will be prompted to enter in your **PIN**. Once you have entered your PIN, you may proceed to the Sales component for enrollment.



Think Agent Components



Think Agent Components

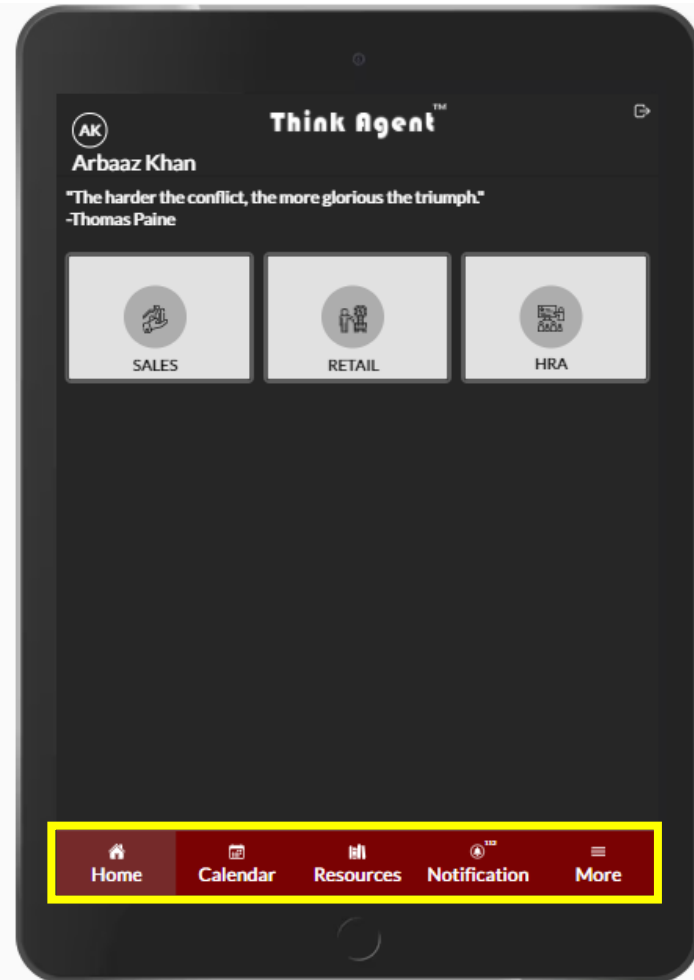


Think Agent is platform that helps Medicare Sales Agents manage their Sales and Marketing activity. This virtual office for Agents will supplement sales efforts!

Think Agent Components are:

- **Sales** – Quote and Enroll beneficiaries in this easy-to-use tool, send Scopes of Appointment, eKits, and find your Book of Business.
- **Retail** – The Retail program provides access to high-traffic retail locations and is low cost for the agent.
- **HRA** – At Aetna, we take a total approach to health, which means not only taking care of our members when they are sick but keeping them healthy as well. Health Risk Assessments help us guide them on their path to better health.

Think Agent Navigation



The bottom navigation sections of Think Agent are:

- **Home** – The Home screen is the starting point in Think Agent.
- **Calendar** – The Retail program provides access to high-traffic retail locations and is low cost for the agent. Agents can request events through the Calendar.
- **Resources** – See valuable Sales and Marketing collateral in the Resources section.
- **Notification** – The Notification section houses important information and reminders to help an agent stay on track.
- **More** – The More section is where an agent can adjust their settings.

Sales



What is the Enrollment opportunity?

Think Agent provides you with the ability to quote and enroll beneficiaries in this easy-to-use tool. You can add drugs, pharmacies and conduct LIS and Medicaid eligibility checks.

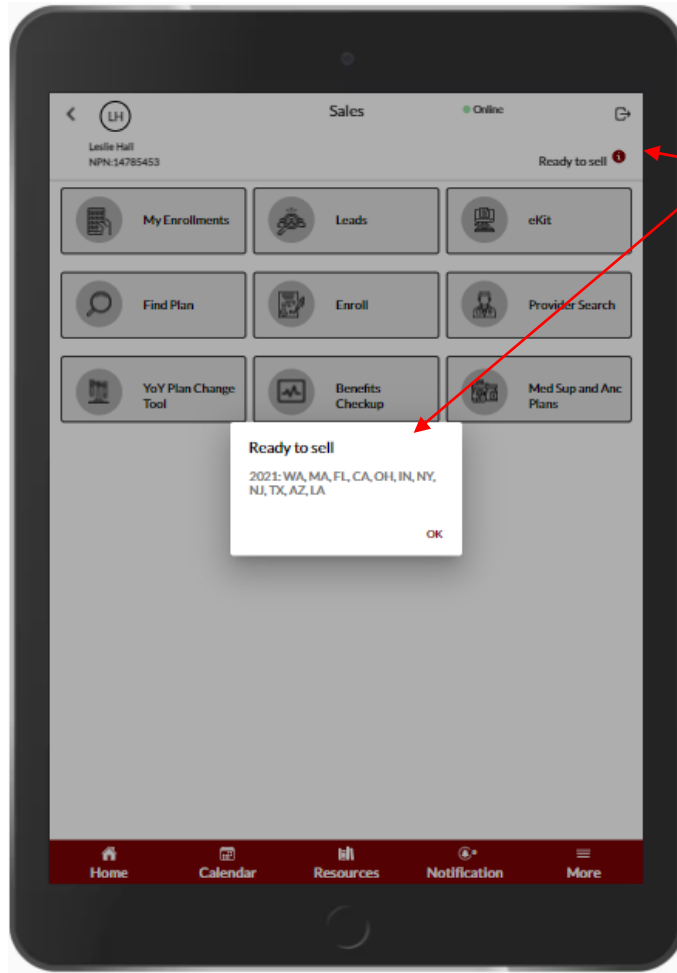
You can also send Scopes of Appointment and eKits, where both you and your beneficiary will receive email or text notifications.

All Enrollments and Scopes will be stored digitally for easy access. You can create a PDF or print for your records.

Enroll in Think Agent today!



Ready to Sell Validation

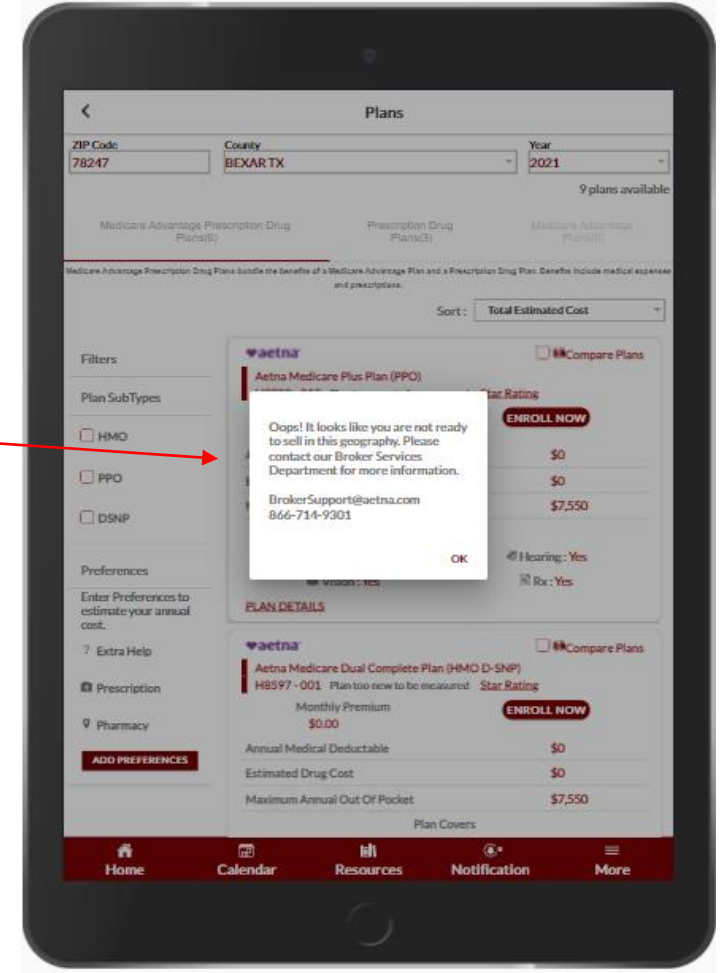


Think Agent has built in Ready to Sell validation. To see your Ready to Sell states, click on **Ready to sell**. Your Ready to sell states will populate.

If you attempt to enroll in a geography in which you are not Ready to sell, you will not be permitted to proceed with that enrollment.

For any questions relating to your Ready to sell status, please contact our Broker Services Department for more information:

BrokerSupport@aetna.com
866-714-9301



My Enrollment



My Enrollments



The **My Enrollments** section allows you to view all enrollments processed through Think Agent. You will be able to see:

- **Actions** – which allows you to download a full application or view high level information like Contract and PBP, Plan Name and Monthly Premium.
- **Confirmation Number**
- **Member Name**
- **Member Zip Code**
- **Effective Date**
- **Enrollment Submitted Date**

You'll also be able to filter search on criteria such as:

- Member Name
- Zip Code
- Plan
- Confirmation Number
- Effective Date

Member Name	Search
ZIP Code	Search
Plan (Contract-PBP)	Search
Confirmation Number	Search
Effective Date	
APPLY CLEAR	

My Enrollments

Actions	confnumber	Membername	ZIPCode	Effdate	submitteddate
 	T12119562A	Leslie	78	09/01/2021	07/14/2021

Enrollment

ConfirmationNumber : T12119562A

Aetna Medicare Premier Plan (HMO) H4523-001
Premium: 0

Initial Enrollment Period & other new to Medicare situations

I'm new to Medicare, am in a Medicare Advantage Plan and have had Medicare for less than 3 months. I want to make a change (Yes)

Requested Effective Date : 09/01/2021

*If none of these statements applies to you or you're not sure, please contact AETNA MEDICARE at 8338596031 (TTY users should call 711) to see if you are eligible to enroll. We are open 8 AM - 8 PM, local time, 7 days a week from 10/1-3/31; 8 AM - 8 PM, local time, Monday-Friday from 4/01-9/30.

Personal Information

First Name*: Leslie
Middle Initials :
Last Name*: H...
Date of Birth*: 03/12
Gender : F
Primary Phone Number : 21
Email Address : lahal

Providing an email address authorizes us to contact you via email. Your email address will be handled consistent with our Privacy Policy.

Permanent Residence

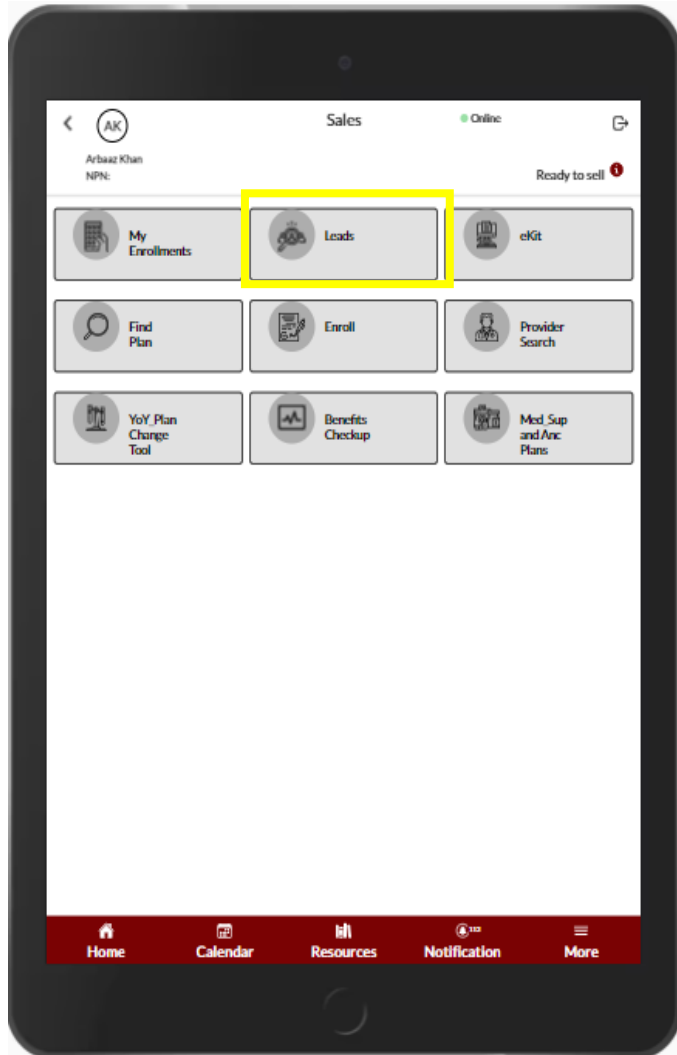
The **Actions** section will allow you to download a fully completed enrollment application for your records or allow you to pull up high level enrollment details on your beneficiary. *(PII has been removed for this demonstration.)*

Enrollment Detail			
Confirmation No.	T12119562A	Member Name	Leslie
DOB	03/12/	State	TX
County	Be...	ZIP Code	78:
Brand	Aetna Medicare	Plan Name	Aetna Medicare Premier Plan (HMO)
Contract & PBP	H4523-001	Monthly Premium	\$0.00
Req. Eff. Date	09/01/2021	App. Submitted Date	07/14/2021

Leads



Leads



Leads are the building block of all activity inside the Sales component of Think Agent.

Any fields documented in the lead template record will auto populate form templates like Scopes of Appointments, eKits and enrollment forms as you work through your quoting and enrollment process.

Leads are also a nice way to retain historical information on your beneficiaries!

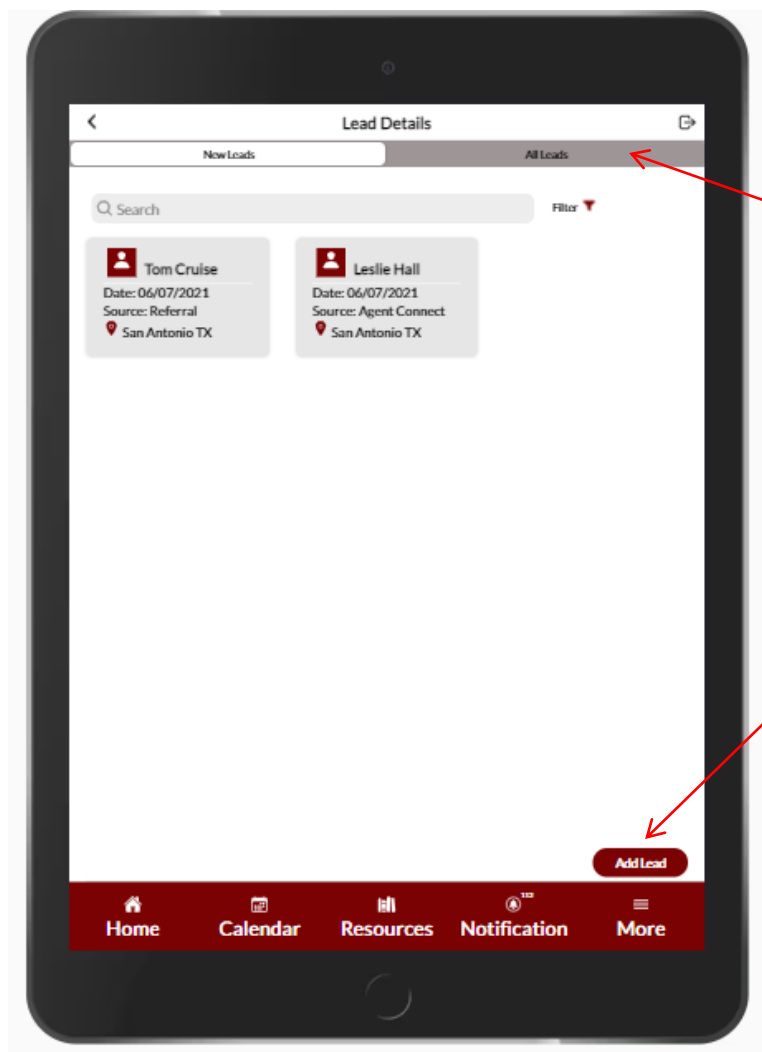
Lead components are:

- **Contact Information**
- **Notes**
- **SOA (Scope of Appointment)**
- **Pharmacy**
- **Drugs**
- **eKit**

Lead functionality allows you to send and re-send Scopes of Appointments and eKits.

You can also **Edit**, **Clone** or **Delete** leads at any time!

All/New Leads



Adding a lead is easy in Think Agent! You will want to add a lead to begin any quoting or enrollment process.

The **Lead Details** screen shows **New Leads** recently added to Think Agent. To view **All Leads**, select the tab at the top of the screen.

Think Agent allows you to search on any lead name.

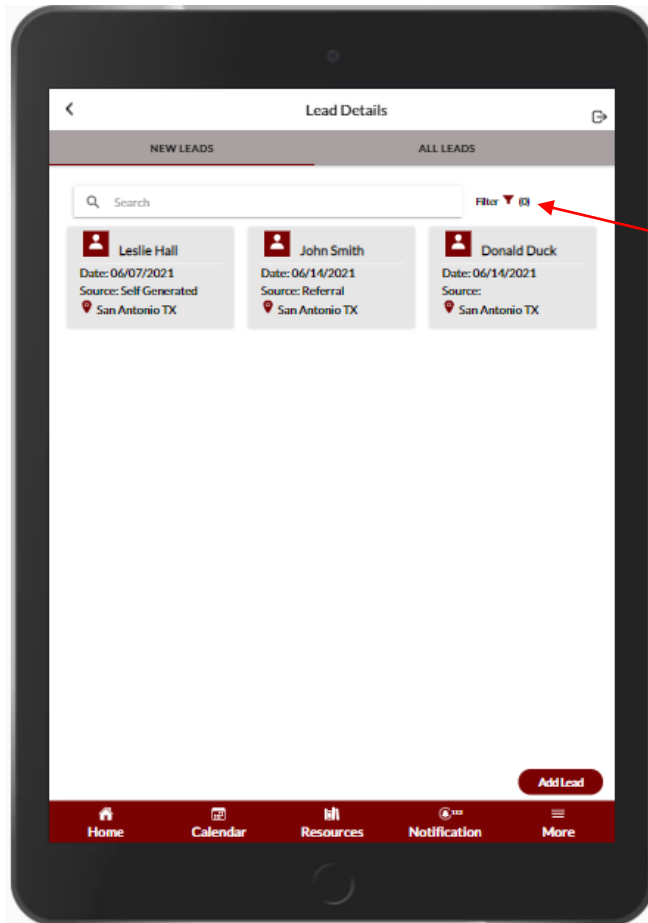
To view a lead, double click the beneficiary's name on the lead card.

To add a lead, click **Add Lead**. A lead template will open.

Any fields you document in the lead template will auto populate form templates like eKits and enrollment forms.

To save your changes, click **Save**.

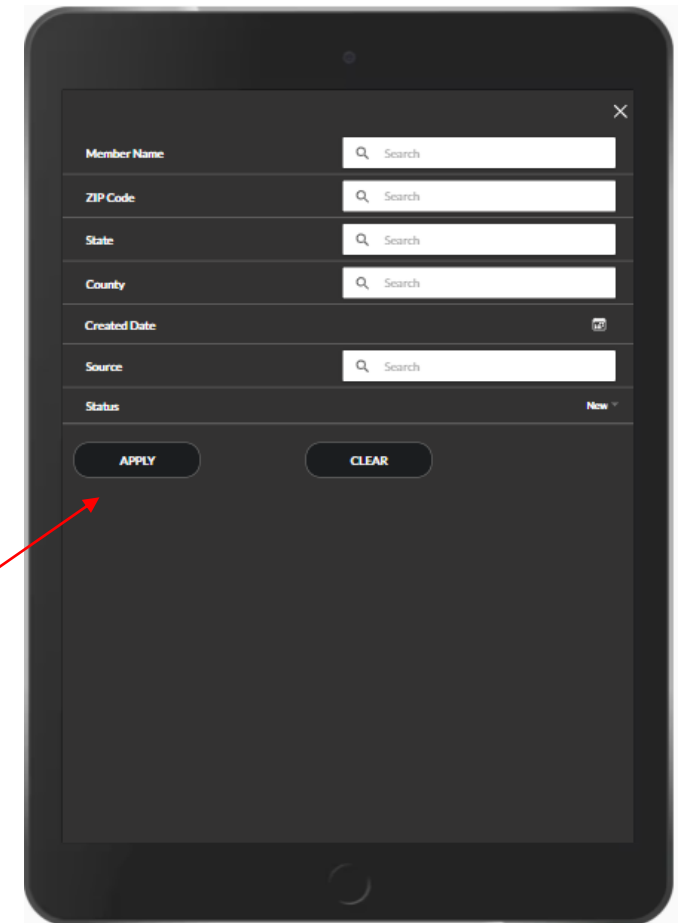
Leads Filter



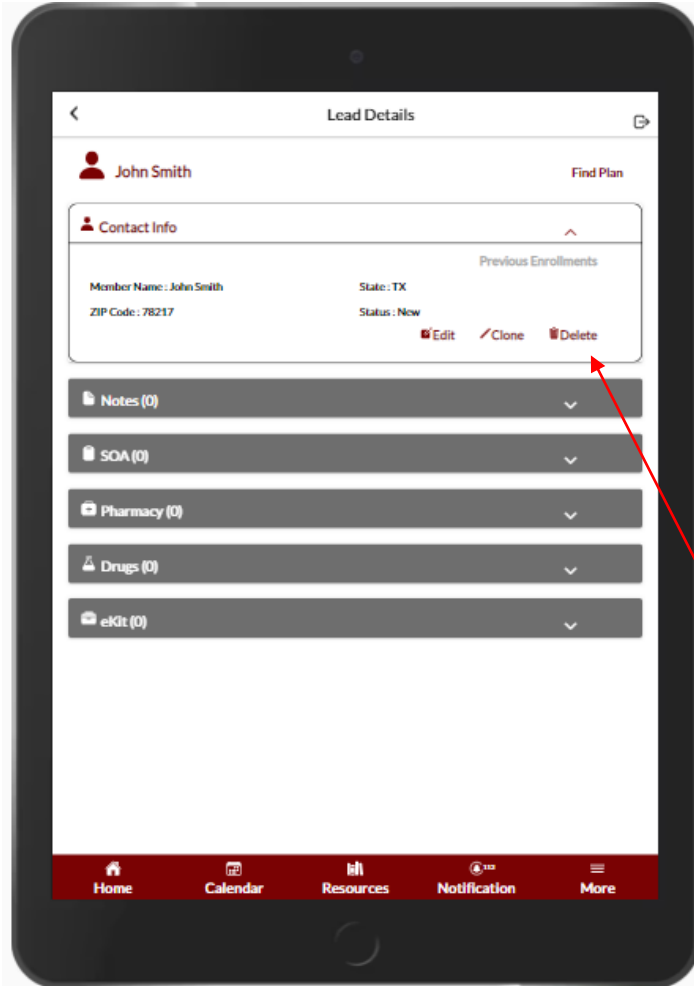
Searching through large quantities of leads is easy with the filter feature. Simply select the **Filter** icon. You are now able to search on:

- **Member Name**
- **Zip Code**
- **State**
- **County**
- **Lead Create Date**
- **Source**
- **Status**

Select **Apply** to see results.



Lead Contact Information



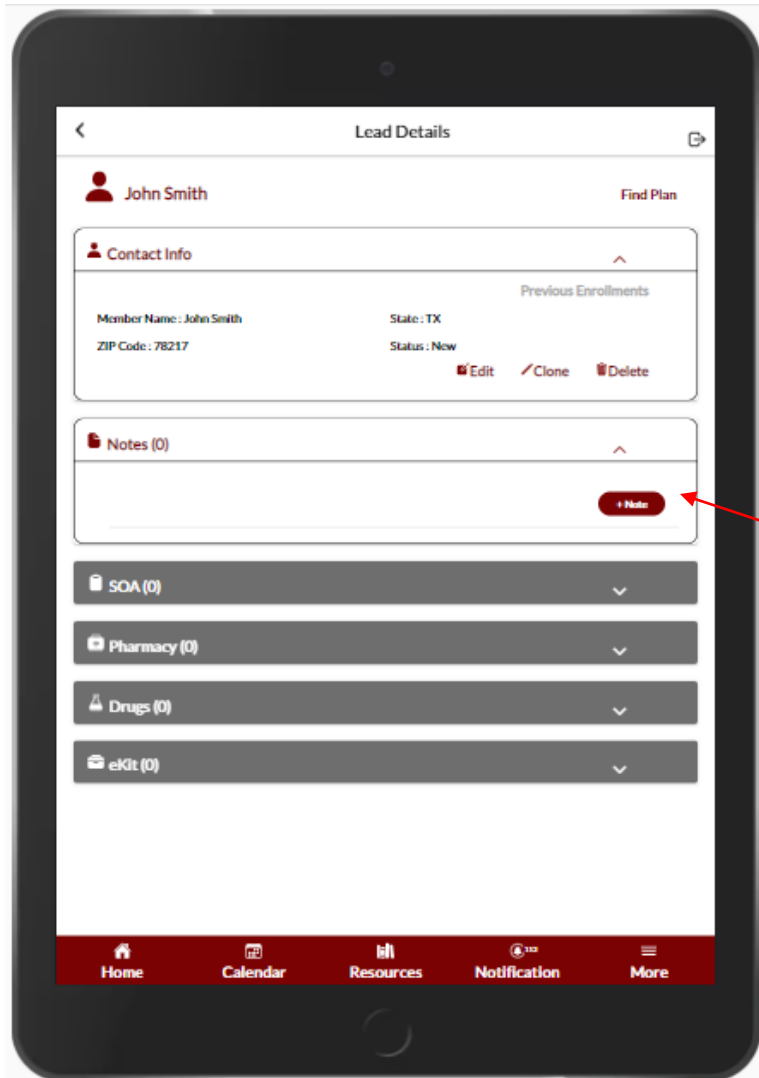
The Lead **Contact Information** will follow you through the quoting and enrollment process. Any fields you populate in the Contact Information section will auto-populate form templates like Scope of Appointment, eKit and enrollment forms.

Lead **Contact Information** includes:

- **Medicare number**
- **Part A & B dates**
- **Beneficiary name and demographic information**
- **Lead Source and Status**
- **Permission to Contact**
- **Existing Aetna Member**

You can **Edit**, **Clone** and **Delete** leads at any time!

Lead Notes



Notes are an efficient and effective way to profile or document information about a beneficiary.

As notes are entered, they are autosaved and will display for easy retrieval!

Notes are also date and time stamped for a historical reference.

You can edit or delete notes at any time.

To add a note, select **+Note**.

Lead Scope of Appointment

To create a Scope of Appointment (SOA), select **Create SOA**.

The screenshot shows the 'Lead Details' screen for a lead named John Smith. The screen includes sections for Contact Info, Notes, SOA, Pharmacy, Drugs, and eKit. A red arrow points to the 'Create SOA' button located at the bottom right of the SOA section.

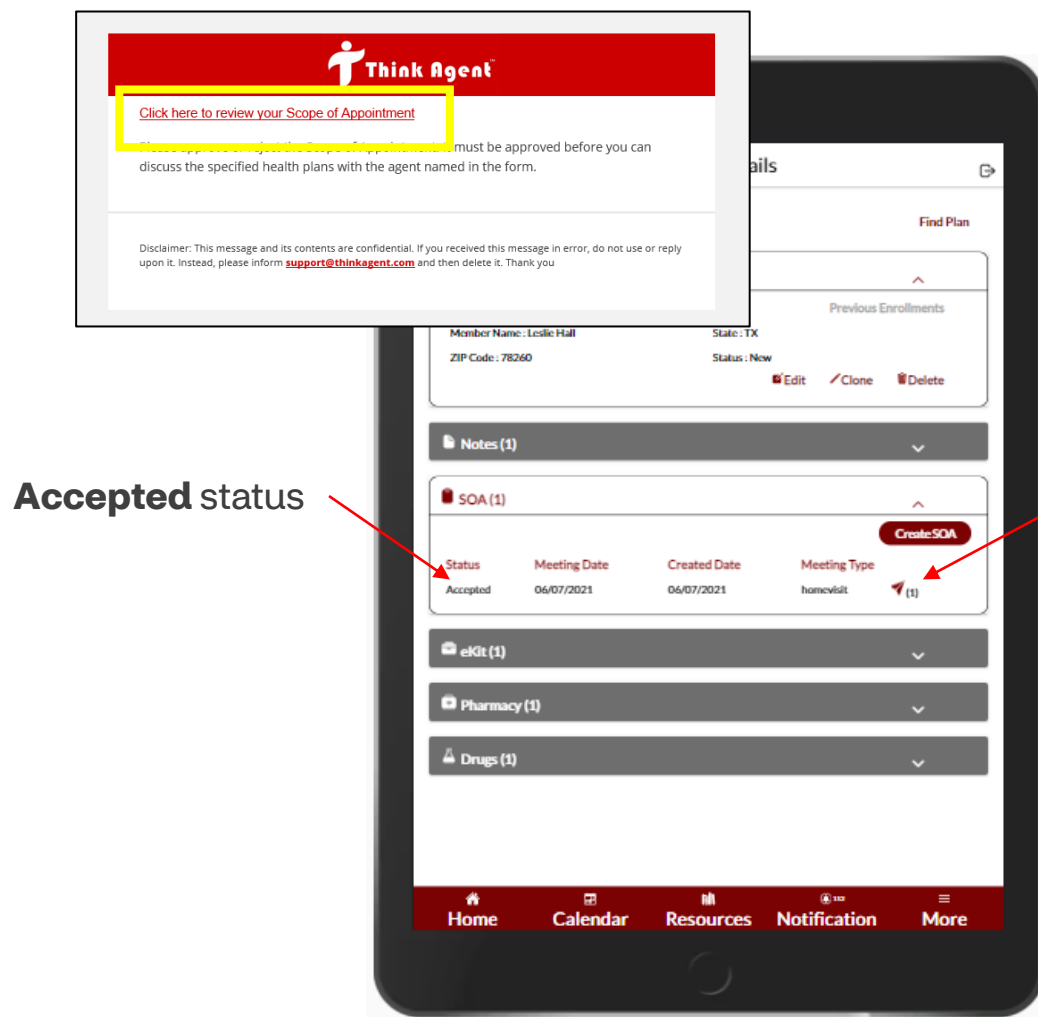
All previously entered Lead criteria will auto populate the SOA form. Select the **Products to Discuss** and navigate to **Meeting Summary**.

The screenshot shows the 'SOA' form. It includes a section for Beneficiary Information with fields for First Name, Last Name, Date of Birth, Gender, Phone, Email, Address1, Address2, ZIP Code, State, County, and City. Below this is the 'Product To Discuss' section with radio buttons for Stand Alone Medicare Prescription Drug Plans (Part D), Medicare Advantage Plans (Part C) and Cost Plans, Dental/Vision/Hearing Products, Supplemental Health Products, and Medicare Supplement (Medigap) Products. A red arrow points to the 'Product To Discuss' section. The bottom of the screen shows a navigation bar with Home, Calendar, Resources, Notification, and More.

In the **Beneficiary Agreement** section, populate your meeting date and time. Select how you would like to send the SOA and click **Submit**.

The screenshot shows the 'SOA' form, specifically the 'Beneficiary Agreement' section. It includes fields for Meeting Date, Meeting Time, Meeting Type, Created Date, Beneficiary Name, Beneficiary Signature Date, Representative's Name, and Relationship to Beneficiary. There are checkboxes for 'Send Email On Submit' and 'Send Text On Submit'. A red arrow points to the 'Submit' button at the bottom right. The bottom of the screen shows a navigation bar with Home, Calendar, Resources, Notification, and More.

Lead Scope of Appointment

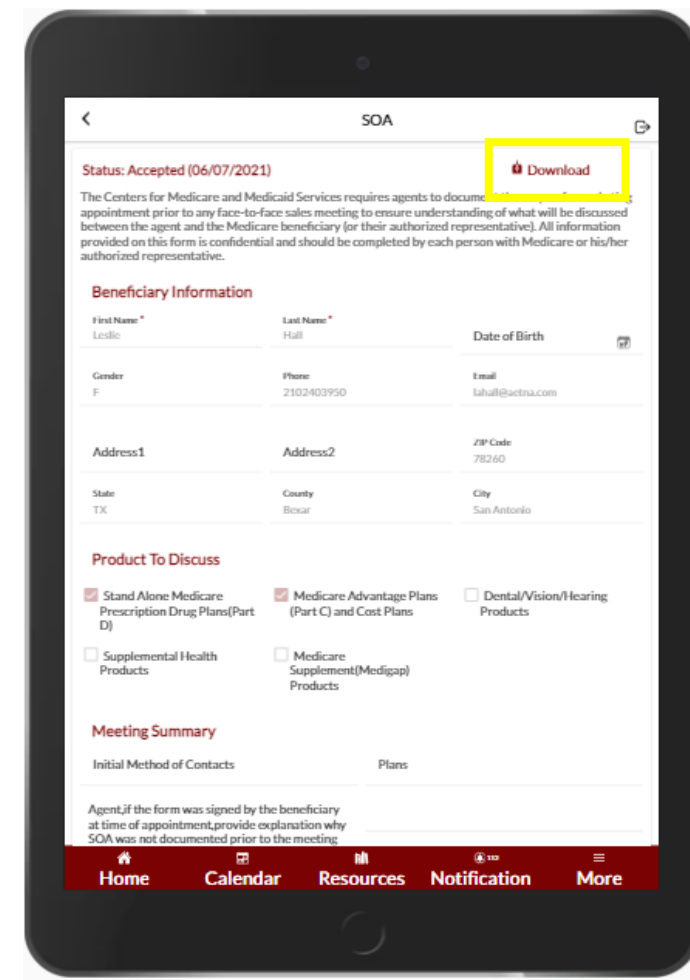


The beneficiary will receive either a text or an email notification and will click the hyperlink to accept the Scope of Appointment.

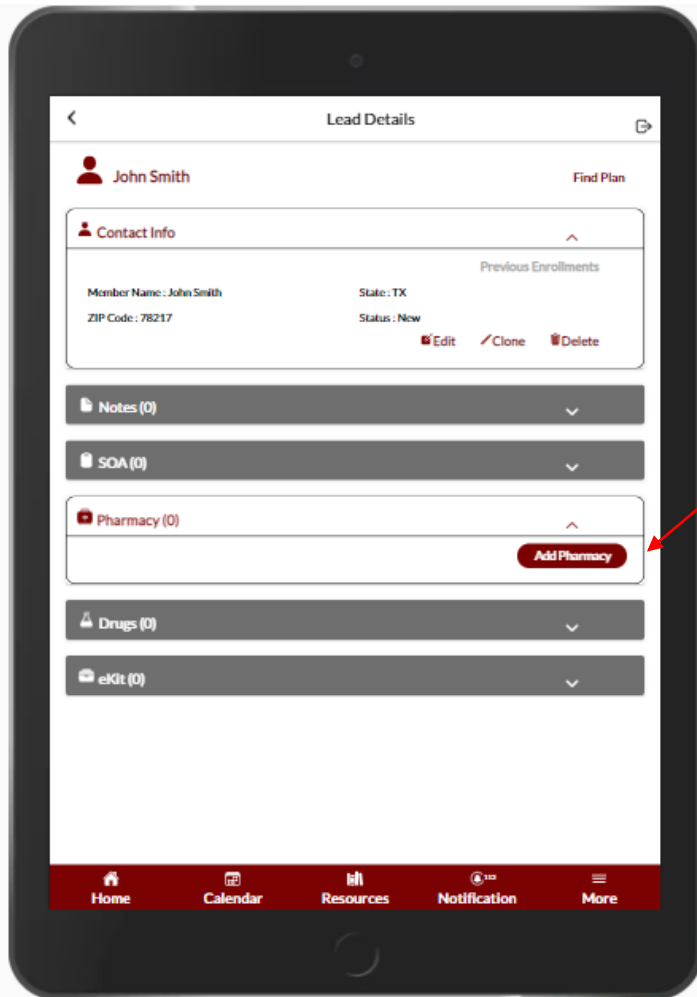
If you need to resend a SOA, click the **arrow** button.

Once your beneficiary accepts the SOA, the status of the SOA will update to **Accepted**.

You are now able to **download** a PDF of the SOA for your records.



Lead Pharmacy

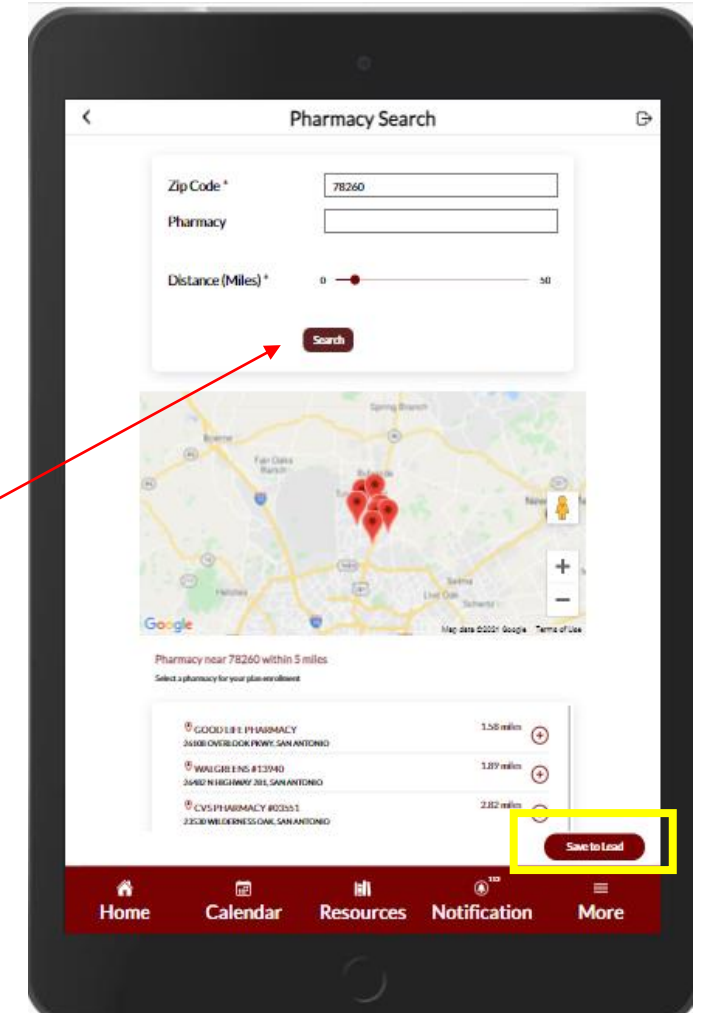


As you build your lead profile, you will want to add a Pharmacy to the beneficiary's information. The Pharmacy locator is simple in Think Agent!

To add a Pharmacy, select **Add Pharmacy**. On the next screen, you can modify the scope of your search by adjusting the **Distance**. Think Agent defaults to a 5-mile radius.

Once presented with search results, you will select your Pharmacy and click **Save to Lead**.

Preferred pharmacy locations will present after a plan has been selected.



Lead Drugs

Lead Details

John Smith Find Plan

Contact Info

Member Name: John Smith State: TX
ZIP Code: 78217 Status: New

Previous Enrollments

Edit Clone Delete

Notes (0)

SOA (0)

Pharmacy (0)

Drugs (0)

Add Drugs

eKit (0)

Home Calendar Resources Notification More

Adding drugs to the lead profile is an important step to building a lead. Adding drugs will impact the **Drug Cost Calculator** in your quoting and enrollment process.

To add a drug, select **Add Drugs**.

The next screen will ask for drug information. Use the dynamic search feature to find, select appropriate drug **Dose** and **Form** and enter **Quantity** and **Frequency**.

You will also be notified if the drug you've selected has a **Generic** equivalent.

To save your changes, select **Add** and **Save to Lead**.

Drug Search

Add your prescriptions to see how each plan provides coverage

synthroid

Synthroid

Select your dosage and enter the amount you use below.

Select dose and form

Select Dosage

Enter Quantity and Frequency

per month

Would you like to use a Generic (Levothyroxine Sodium) for Synthroid

According to the FDA, this generic drug has the same quality, strength, safety and active ingredient as the brand name drug.

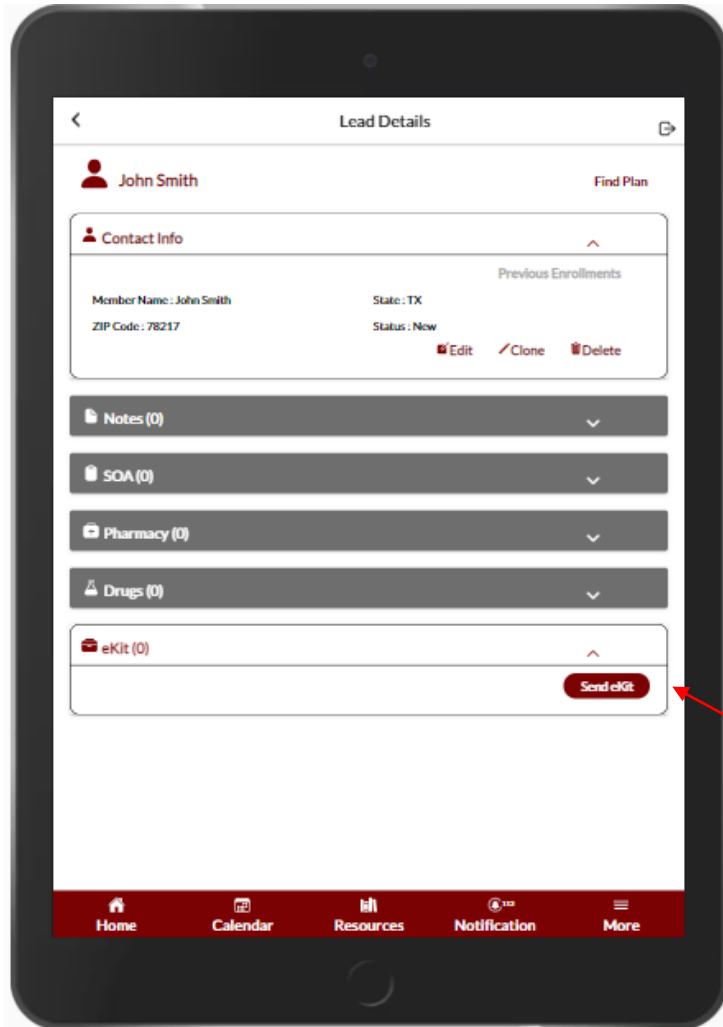
Yes No

Add

Save to Lead

Home Calendar Resources Notification More

Lead eKit

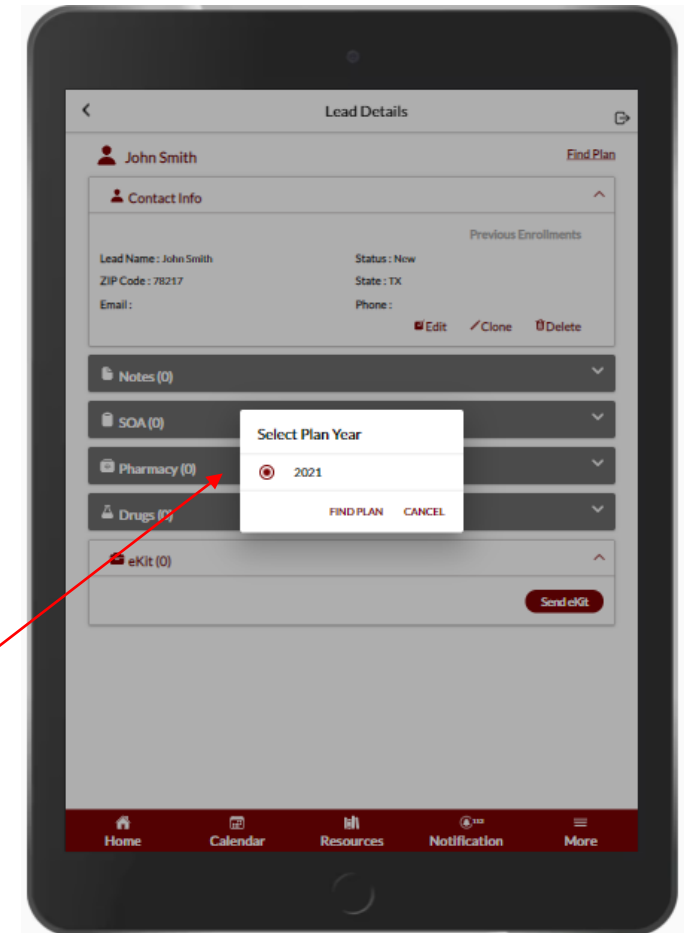


eKits are an easy and compliant way for your clients to enroll in MA/MAPD/PDP plans when you're not able to meet with them in person.

You'll simply send your clients an email with a link to enroll and you will be retained as the writing agent on the sale!

After you press send, your client will receive a unique verification code and an email containing all required plan documents for the selected plans as well as a link to enroll.

To send an eKit, select **Send eKit** and select the appropriate **plan year**. You will see two plan years from October through December.



Lead eKit

Plans

ZIP Code: 78217 County: BEXAR TX Year: 2021

9 plans available

Medicare Advantage Prescription Drug Plans(6) Prescription Drug Plans(3) Medicare Advantage Plans(0)

Medicare Advantage Prescription Drug Plans bundle the benefits of a Medicare Advantage Plan and a Prescription Drug Plan. Benefits include medical expenses and prescriptions.

Sort: Total Estimated Cost

Filters

Plan SubTypes

Preferences

Enter Preferences to estimate your annual cost.

Extra Help

Prescription

Pharmacy

ADD PREFERENCES

Aetna Medicare Premier Plan (HMO) H4523-001 ★★★★★ Star Rating

Monthly Premium: \$0.00

Annual Medical Deductable: \$0

Estimated Drug Cost: \$0

Maximum Annual Out Of Pocket: \$5,900

Plan Covers: Dental: Yes, Hearing: Yes, Vision: Yes, Rx: Yes, Walmart - Preferred Retail

CREATE eKIT

Aetna Medicare Choice Plan (PPO) H3288-001 Plan too new to be measured Star Rating

Monthly Premium: \$15.00

Annual Medical Deductable: \$0

Estimated Drug Cost: \$0

Maximum Annual Out Of Pocket: \$7,550

Plan Covers

Next you will select your plan by clicking **Create eKit**.

You will now be able to add a message to the beneficiary and select how you would like the verification code to be sent to your client. You can email, text or both!

To send the eKit, click **Send**.

The beneficiary will receive two notifications containing a verification code and link to enroll.

Think Agent

Dear Leslie Hall

Thank you for your interest in our healthcare plan(s). Below you will find quick access to additional information about the plan. If you are ready, you may enroll in the plan now.

Agent's message:
%%AGENT MESSAGE%%

Aetna Medicare Premier Plan (HMO)
211119
Monthly Premium: 0

[Enroll Now](#)

Additional Information

Medicare plans can be complicated. You may have been provided with documents detailing how the plan works. These documents can be found below

Think Agent

You've been sent an email containing a link. Please use the Verification Code **297435442** to open the link.

Disclaimer: This message and its contents are confidential. If you received this message in error, do not use or reply upon it. Instead, please inform support@thinkagent.com and then delete it. Thank you

eKit

Member Information

First Name: Leslie Last Name: Hall Date of Birth: [icon]

Gender: F Phone: 2102403950 Email: lahall@aetna.com

Address1: Address2: ZIP Code: 78260

State: TX County: Bexar City: San Antonio

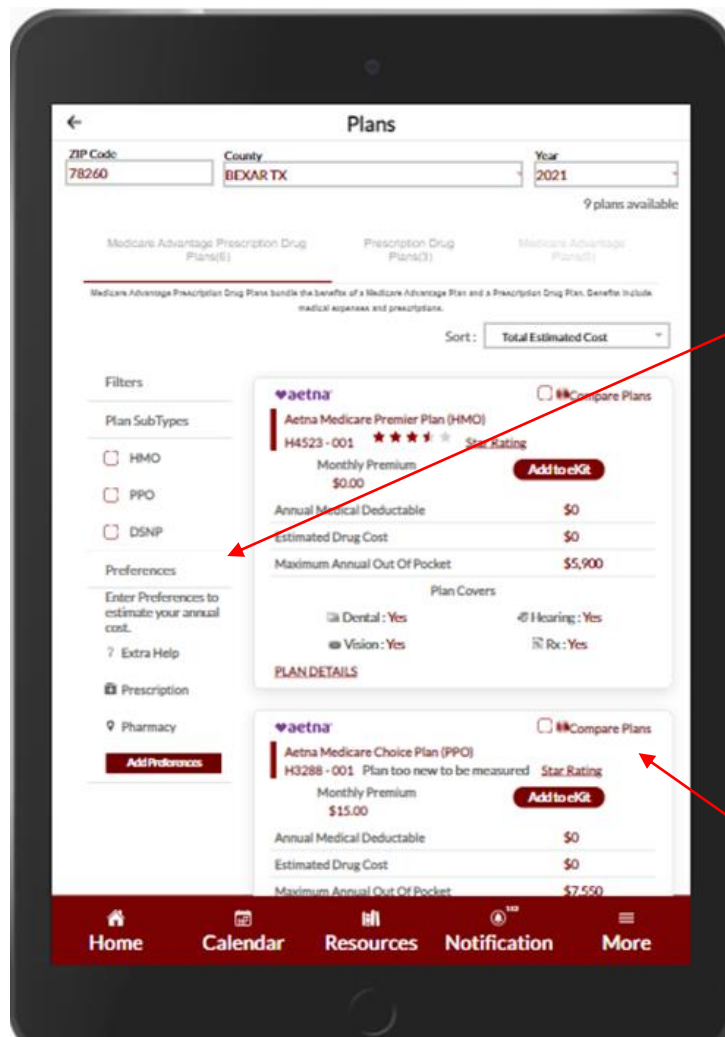
Plan Name: Aetna Medicare Premier Plan (HMO) (H4523-001) Message:

Send Verification Code via: ☒ Mail at lahall@aetna.com ☐ Text to 210240

Cancel Send

Resources Notification More

Did you know?



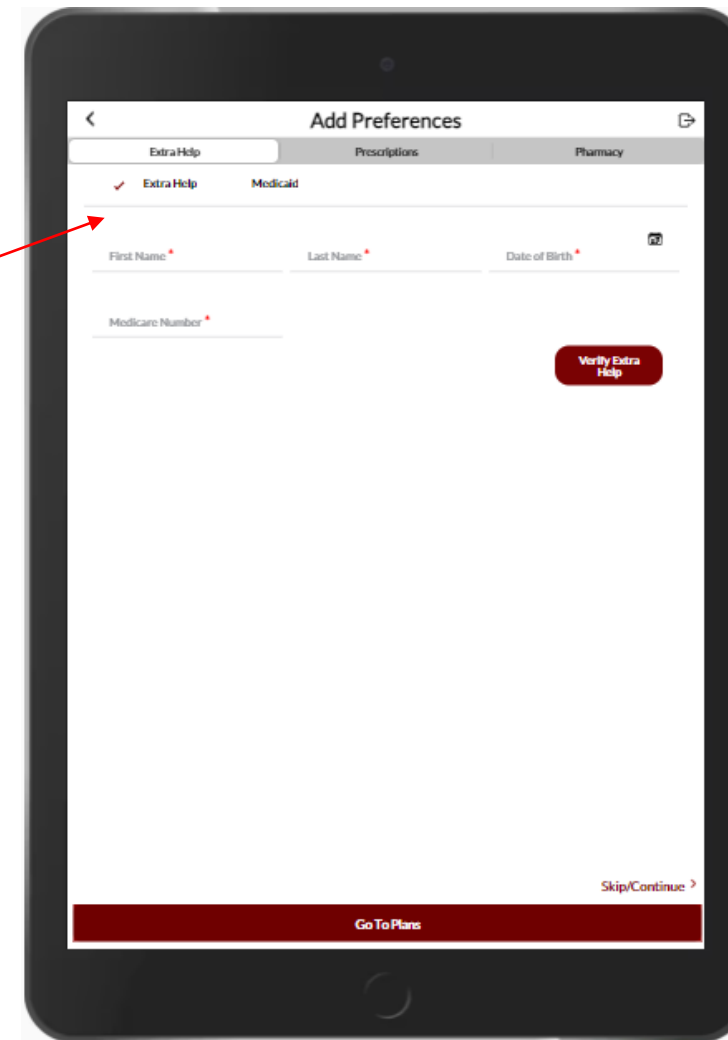
Before you send an eKit, you can filter for **Specific Plan Sub Types** and **Add Preferences**.

Preferences include:

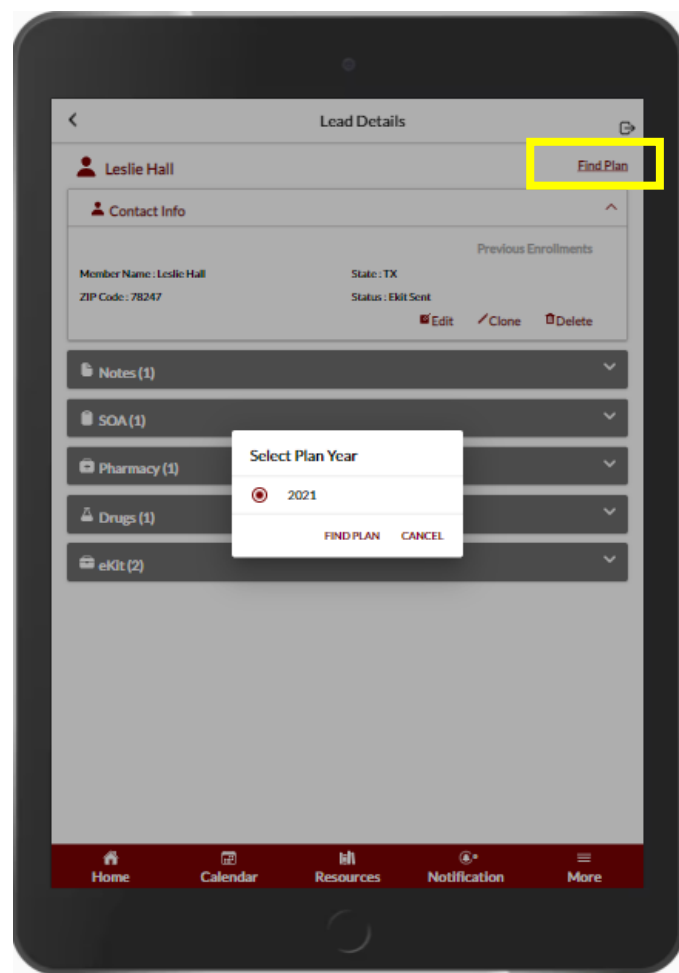
- **Extra help Verification**
- **Medicaid Eligibility Check**
- **Add Prescriptions** so that the Estimated Drug Cost will calculate and
- **Add a Pharmacy**

**Extra Help and Medicaid Eligibility fields will auto populate if the criteria is documented on the Lead record.*

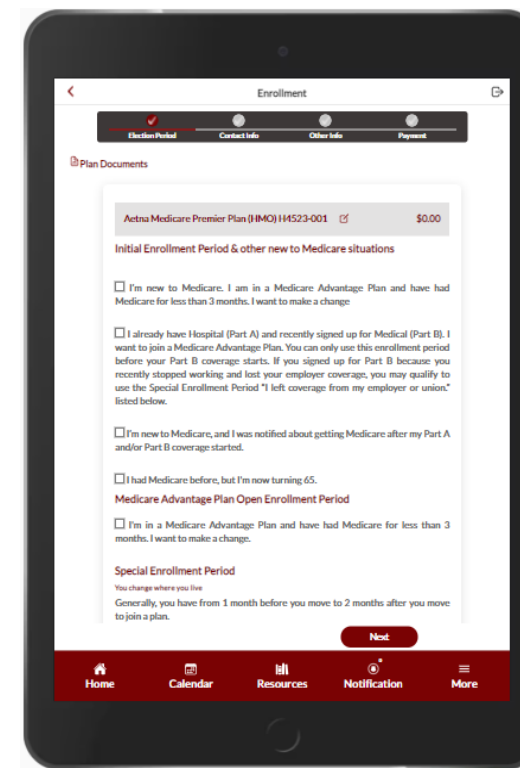
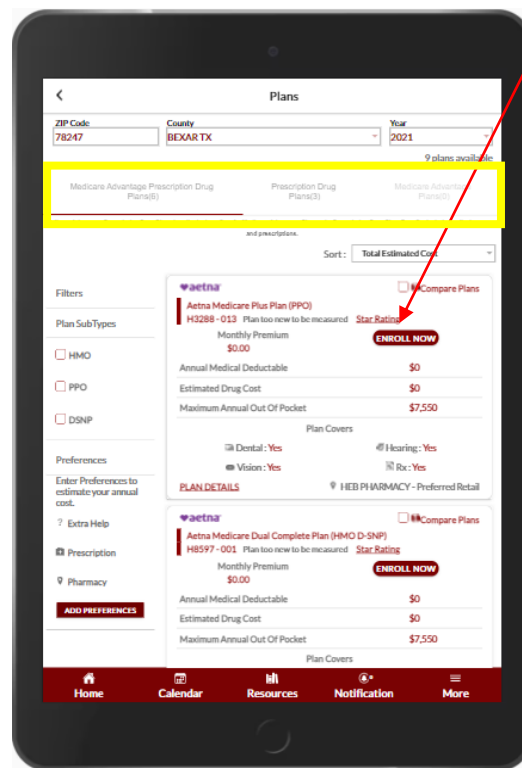
You can also compare up to three plans for a side-by-side comparison of benefits.



Lead Find A Plan/Enroll



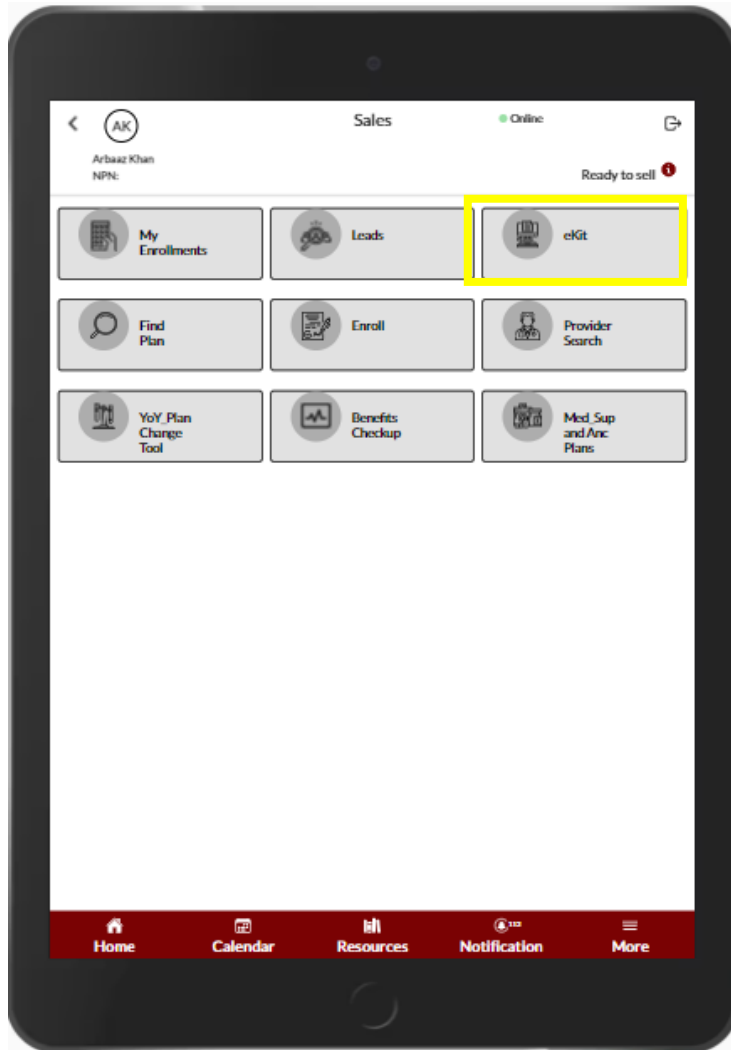
To enroll a beneficiary into a plan, select **Find Plan**. Next, select the appropriate year by **Select Plan Year** and **Find Plan**. The **Enroll Now** button is now available for you to process an enrollment. To navigate to other products, select your preference in the yellow box.



eKit



eKit



eKits are an easy and compliant way for your clients to enroll in MA/MAPD/PDP plans when you're not able to meet with them in person.

You'll simply send your clients an email with a link to enroll and you will be retained as the writing agent on the sale!

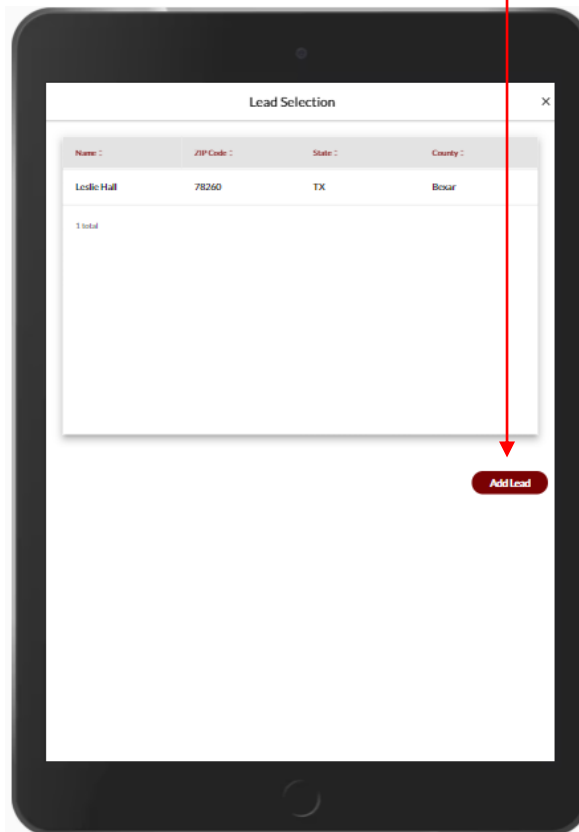
After you press send, your client will receive a unique verification code and an email containing all required plan documents for the selected plans as well as a link to enroll.

To send an eKit from the Sales dashboard, select **eKit**.

Next you will be prompted to select a lead or add your beneficiary's information as a new lead.

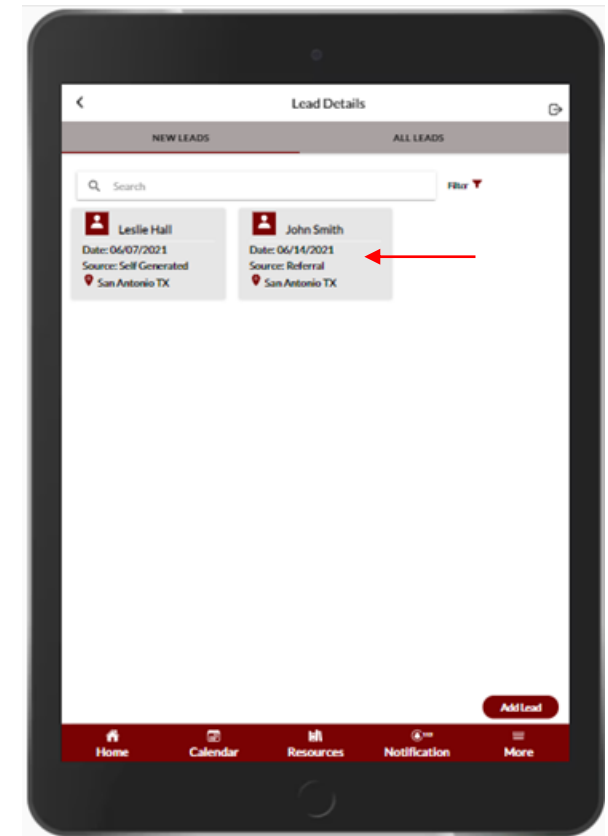
eKit

To select an existing lead, double click the Lead Name.
To add a new lead, select **Add Lead**.



Populate the Lead template and click **Save**.

Now that your lead has been created, double click the Lead card to proceed.



eKit

Plans

ZIP Code: 78217 County: BEXAR TX Year: 2021

9 plans available

Medicare Advantage Prescription Drug Plans(6) Prescription Drug Plans(3) Medicare Advantage Plans(0)

Medicare Advantage Prescription Drug Plans bundle the benefits of a Medicare Advantage Plan and a Prescription Drug Plan. Benefits include medical expenses and prescriptions.

Sort: Total Estimated Cost

Filters

Plan SubTypes

Preferences

Enter Preferences to estimate your annual cost.

Extra Help

Prescription

Pharmacy

ADD PREFERENCES

Aetna

Aetna Medicare Premier Plan (HMO)

H4523-001 ★★★★★ Star Rating

Monthly Premium: \$0.00

Annual Medical Deductable: \$0

Estimated Drug Cost: \$0

Maximum Annual Out Of Pocket: \$5,900

Plan Covers

Dental: Yes Hearing: Yes

Vision: Yes Rx: Yes

PLAN DETAILS

Walmart - Preferred Retail

Aetna

Aetna Medicare Choice Plan (PPO)

H3288-001 Plan too new to be measured Star Rating

Monthly Premium: \$15.00

Annual Medical Deductable: \$0

Estimated Drug Cost: \$0

Maximum Annual Out Of Pocket: \$7,550

Plan Covers

Home Calendar Resources Notification More

Next you will select your plan by clicking **Create eKit**.

You will now be able to add a message to the beneficiary and select how you would like the verification code to be sent to your client. You can email, text or both!

To send the eKit, click **Send**.

The beneficiary will receive two notifications containing a verification code and link to enroll.

Think Agent

Dear Leslie Hall

Thank you for your interest in our healthcare plan(s). Below you will find quick access to additional information about the plan. If you are ready, you may enroll in the plan now.

Agent's message:
%%AGENT MESSAGE%%

Aetna Medicare Premier Plan (HMO)
211119
Monthly Premium: 0

[Enroll Now](#)

Additional Information

Medicare plans can be complicated. You may have been provided with documents detailing how the plan works. These documents can be found below

Think Agent

You've been sent an email containing a link. Please use the Verification Code 297435442 to open the link.

Disclaimer: This message and its contents are confidential. If you received this message in error, do not use or reply upon it. Instead, please inform support@thinkagent.com and then delete it. Thank you

eKit

Member Information

First Name* Last Name* Date of Birth

Leslie Hall

Gender Phone Email

F 2102403950 lahall@aetna.com

Address1 Address2 ZIP Code*

TX Bexar 78260

State County City

TX Bexar San Antonio

Plan Name

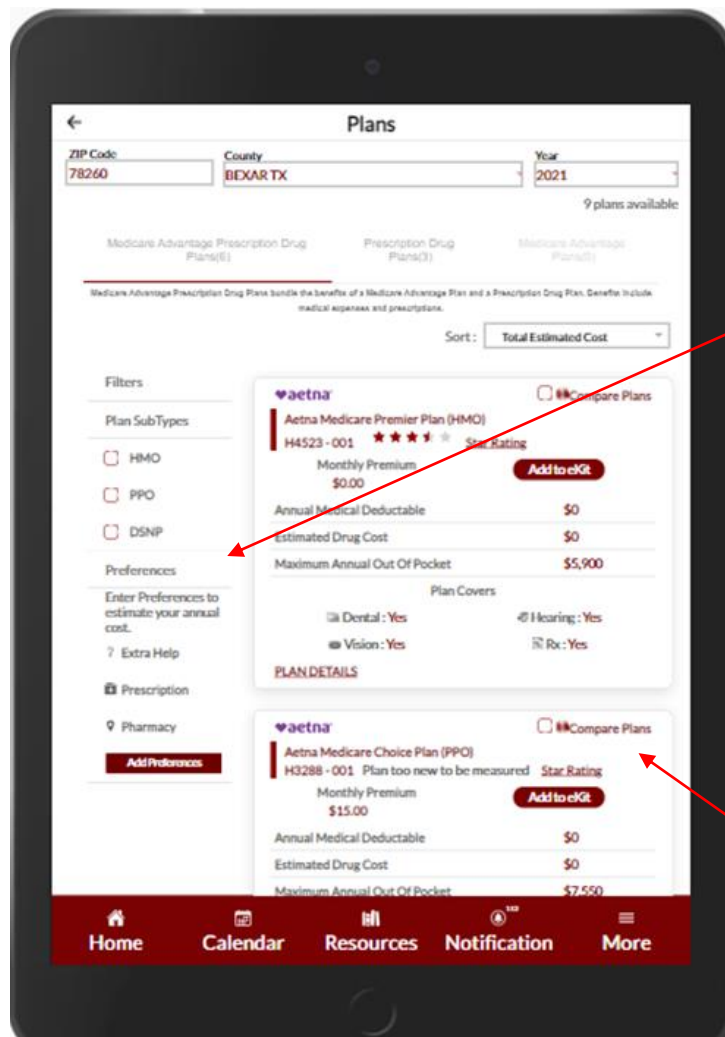
Aetna Medicare Premier Plan (HMO) (H4523-001) Message

Send Verification Code via ☒ Email at lahall@aetna.com ☐ Text to 2102403950

Cancel Send

Resources Notification More

Did you know?



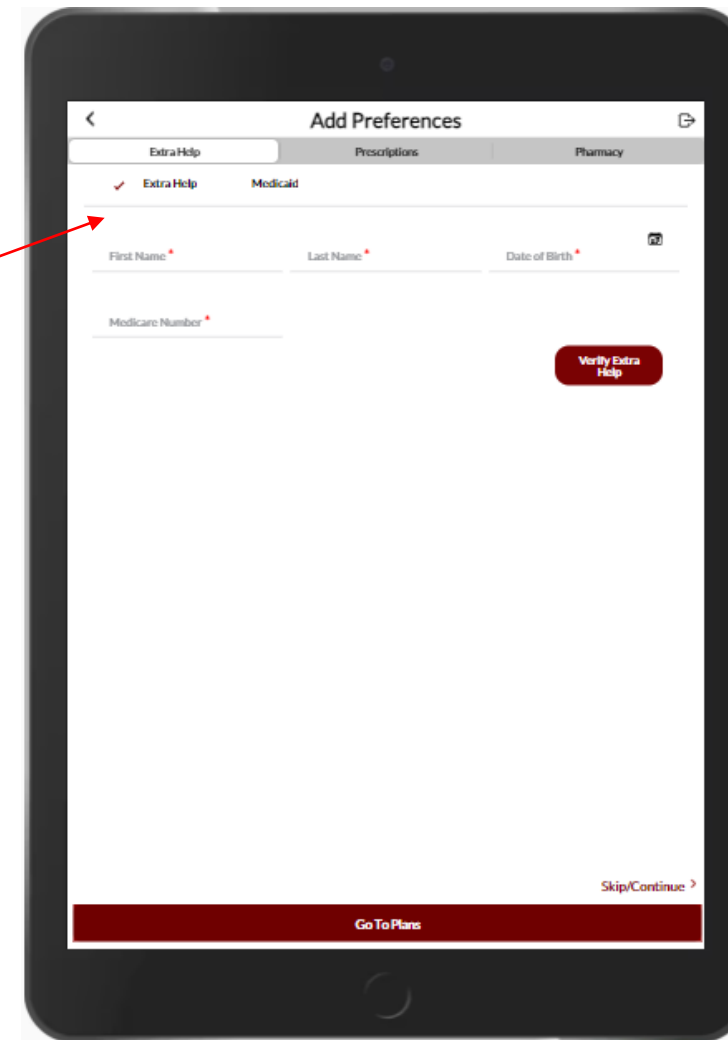
Before you send an eKit, you can filter for **Specific Plan Sub Types** and **Add Preferences**.

Preferences include:

- Extra help Verification
- Medicaid Eligibility Check
- Add Prescriptions so that the Estimated Drug Cost will calculate and
- Add a Pharmacy

**Extra Help and Medicaid Eligibility fields will auto populate if the criteria is documented on the Lead record.*

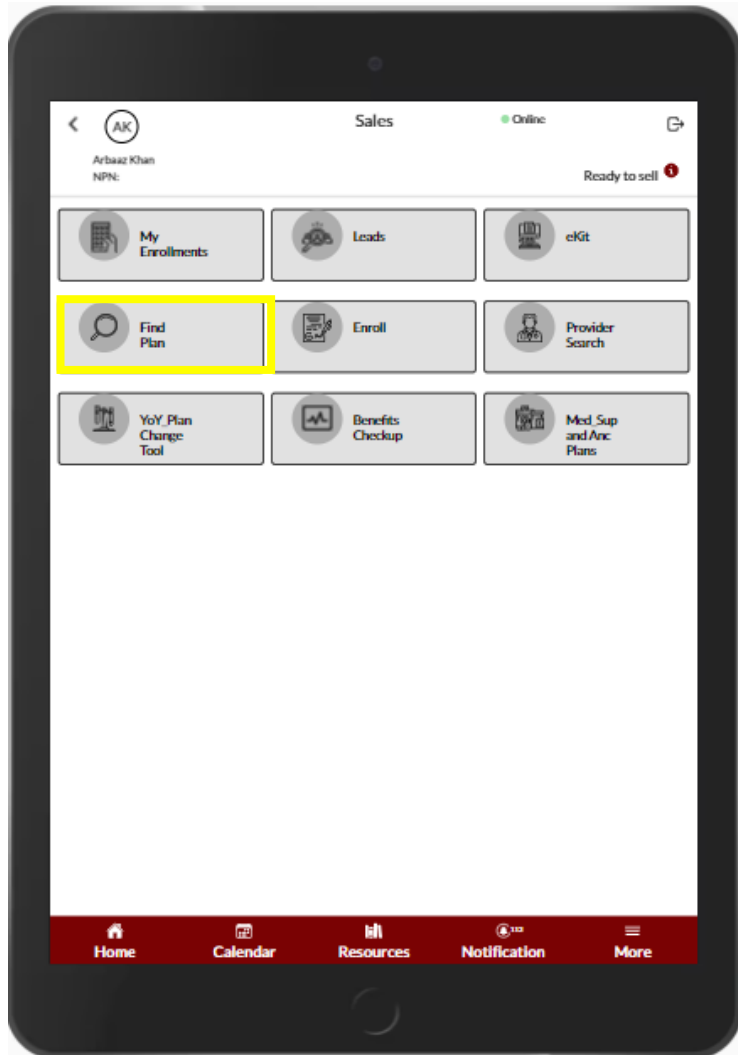
You can also compare up to three plans for a side-by-side comparison of benefits.



Find Plan



Find Plan



Finding plans in Think Agent is simple. This link will allow for the shopping experience. You do not have to be Ready to Sell to see all our product offerings for MA, MAPD, DSNP and PDP.

You will be able to:

- See all plans offered in a specific zip code, county and by plan year
- Filter by Plan Sub Type (HMO/PPO/DSNP)
- Add preferences like Extra Help and Prescription and Pharmacy information
- Compare up to three (3) plans at a time
- Enroll

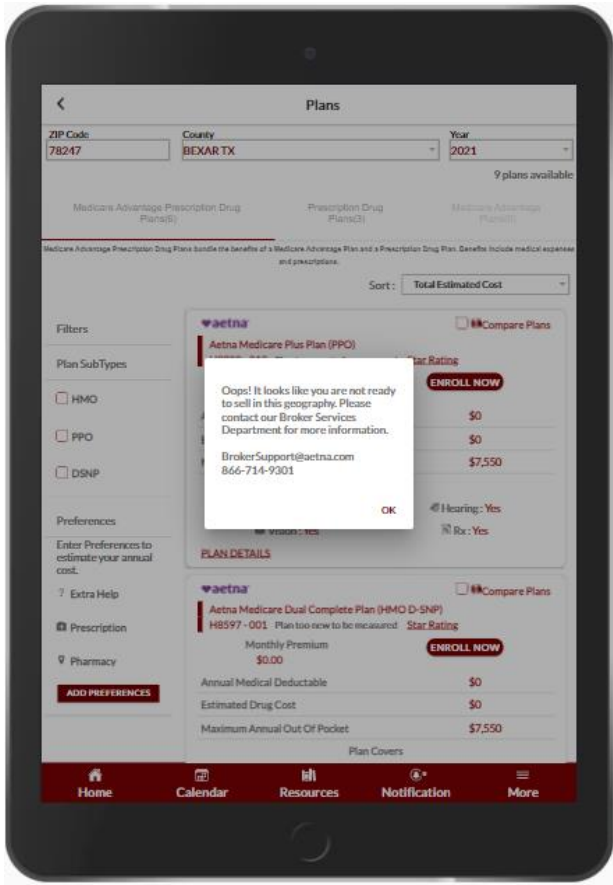
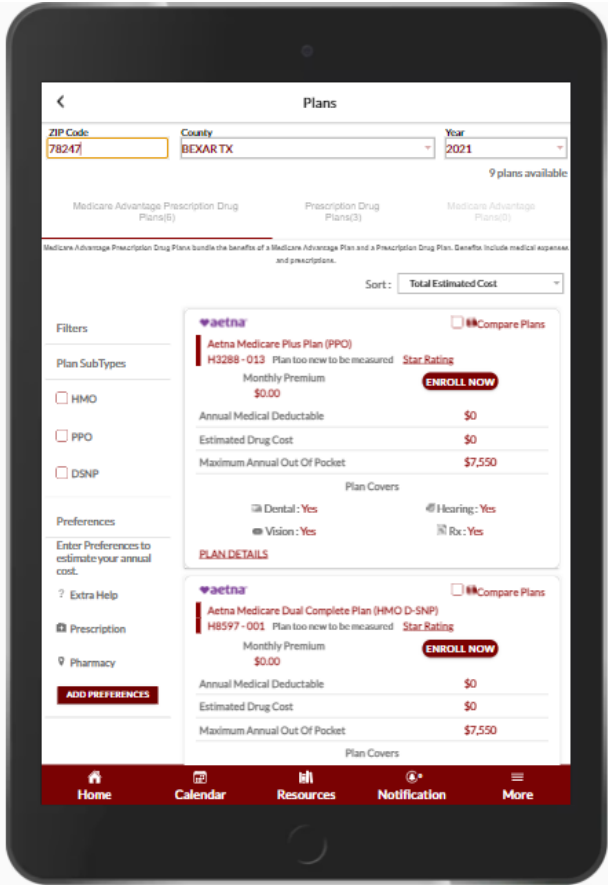
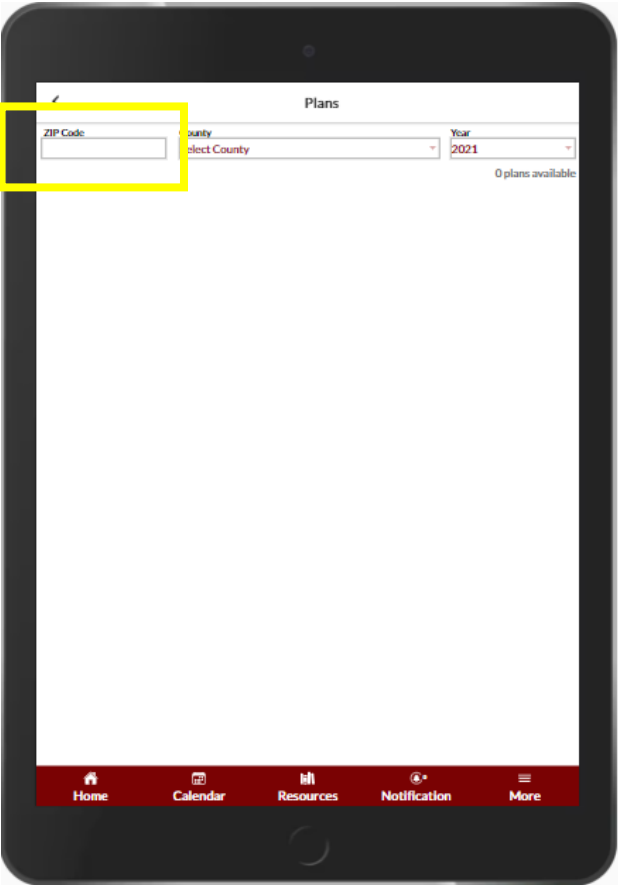
To find a plan from the Sales dashboard, select **Find Plan**.

Find Plan

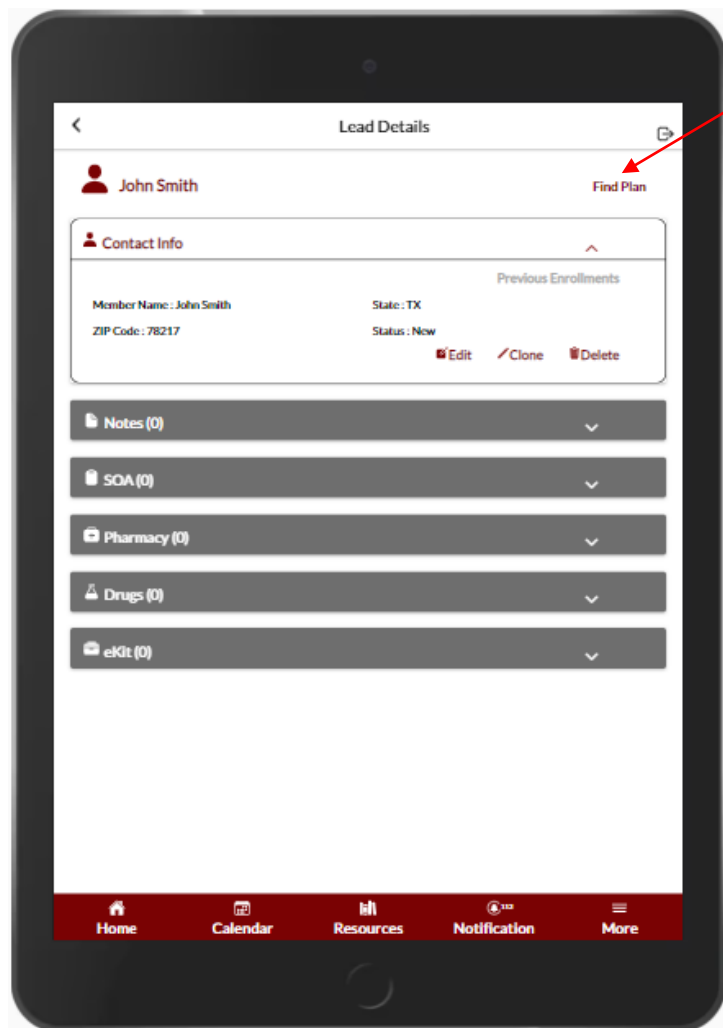
To find a plan, populate a zip code.

All plans in that geography will populate. To enroll a beneficiary, select **Enroll Now**.

If you attempt to enroll a beneficiary in a geography in which you are not ready to sell, you will be directed to reach out to our **Broker Services Department**.



Finding Plans in Lead Details Screen



In a lead, to search for a plan, select **Find Plan** at the top of the lead page. You will be prompted to enter a plan year and then you will select **Enroll** to proceed.

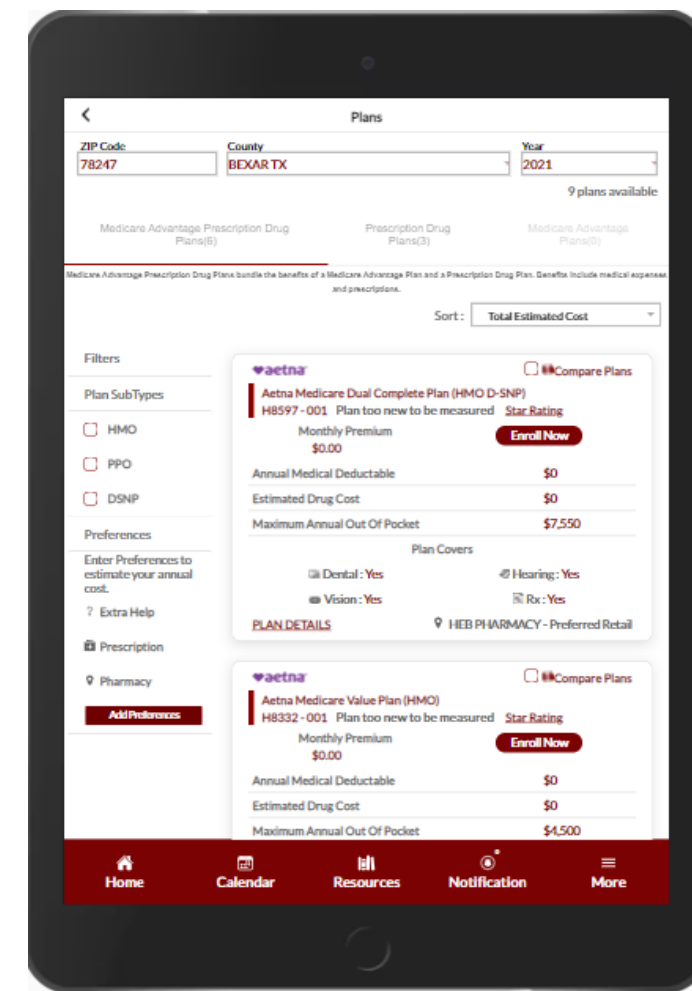
You will now be taken to the available plans for the beneficiary.

You can filter for **Specific Plan Sub Types, Add Preferences and send eKits.**

Preferences include:

- Extra help Verification
- Medicaid Eligibility Check
- Add Prescriptions so that the Estimated Drug Cost will calculate and
- Add a Pharmacy

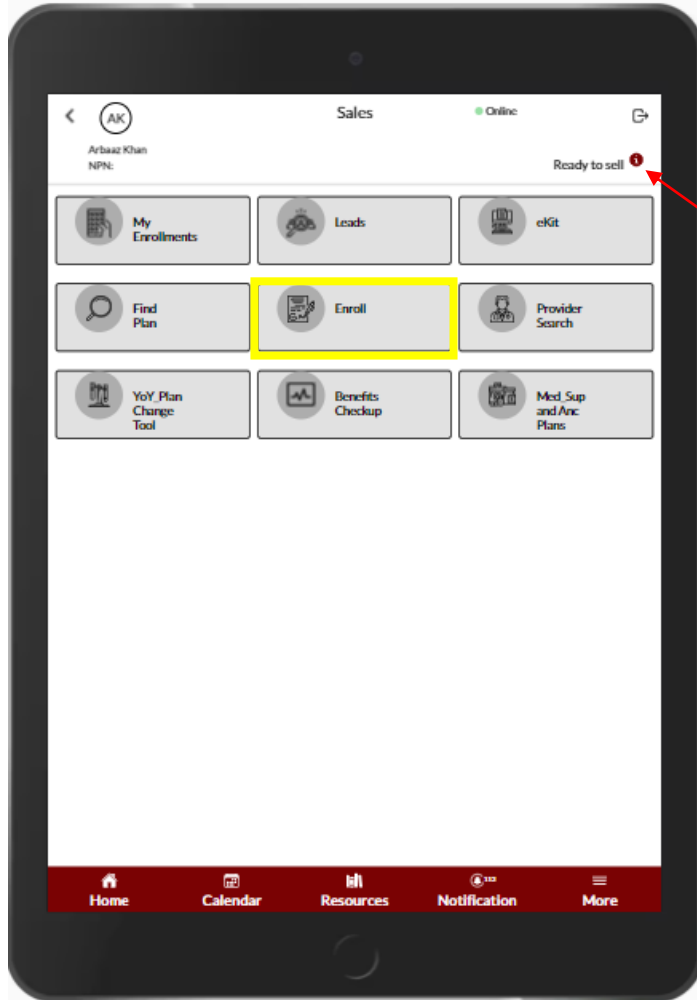
**Extra Help and Medicaid Eligibility fields will auto populate if the criteria is documented on the Lead record.*



Enroll



Enroll



Think Agent will not allow you to enroll beneficiaries if you are not ready to sell for that geography. To see your Ready to Sell states, click the **Ready to sell** icon.

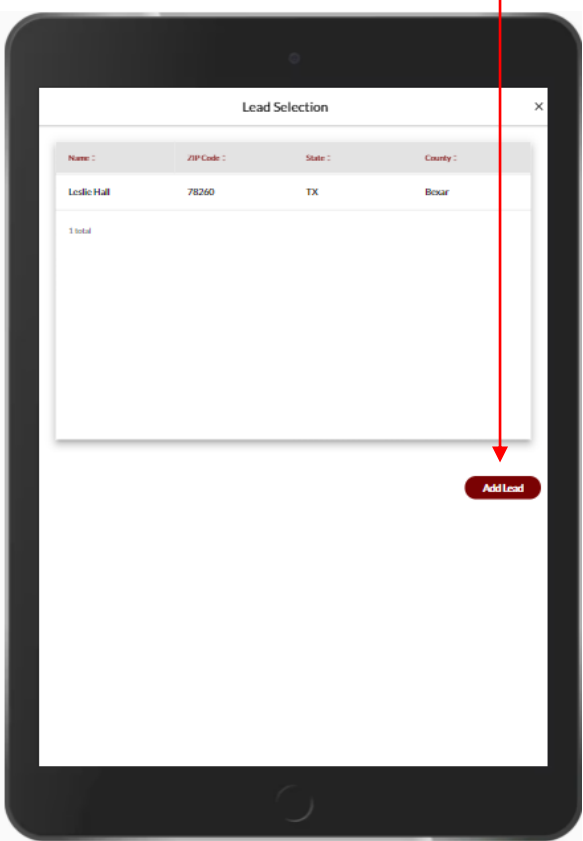
Questions about your Ready to Sell status? Contact Aetna's Broker Services Department at BrokerSupport@aetna.com or 866-714-9301.

Enrolling beneficiaries into MA, MAPD, DSNP and PDP plans with Think Agent is a breeze! Upon enrollment submission both you and your beneficiary will receive an email notification.

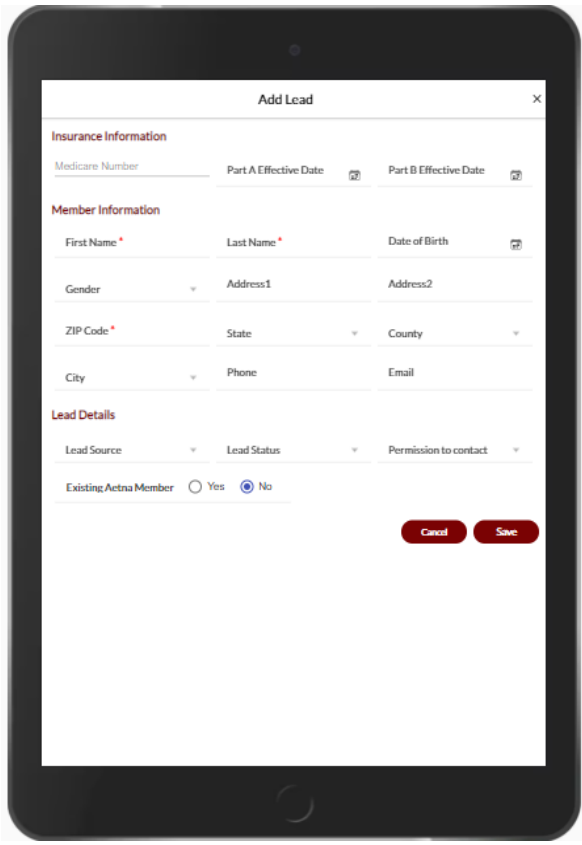
To start the enrollment process, click **Enroll**.

Enroll

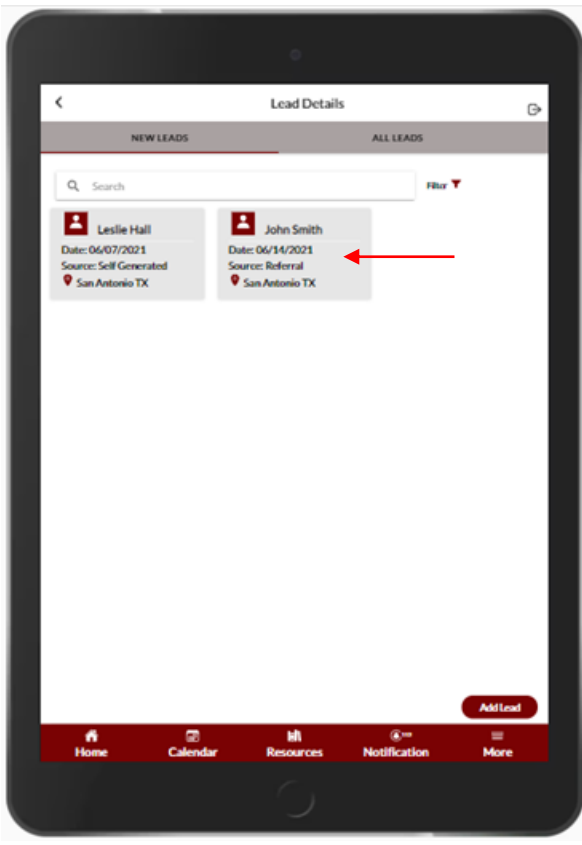
To select an existing lead, double click the Lead Name.
To add a new lead, select **Add Lead**.



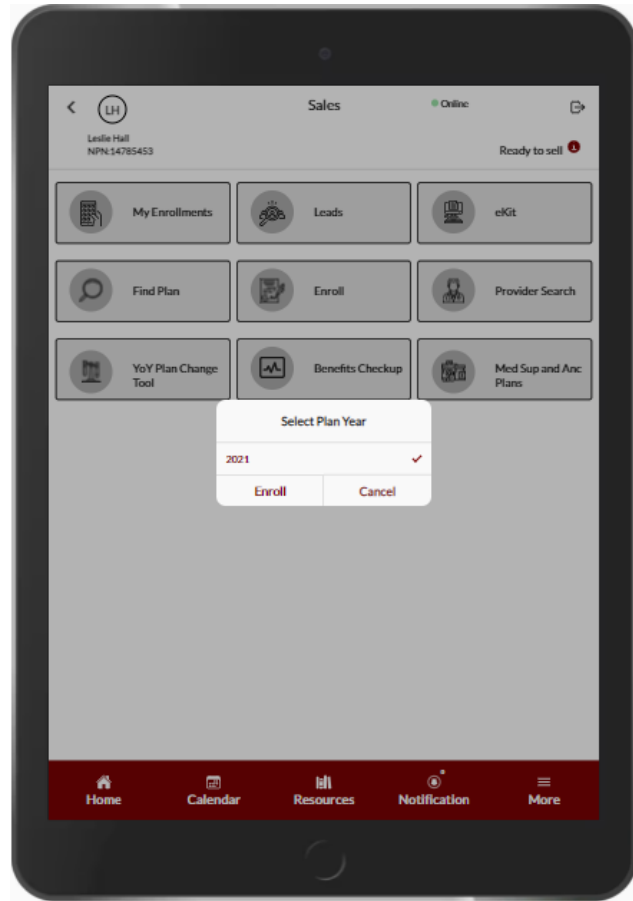
Populate the Lead template and click **Save**.



Now that your lead has been created, double click the Lead card to proceed.



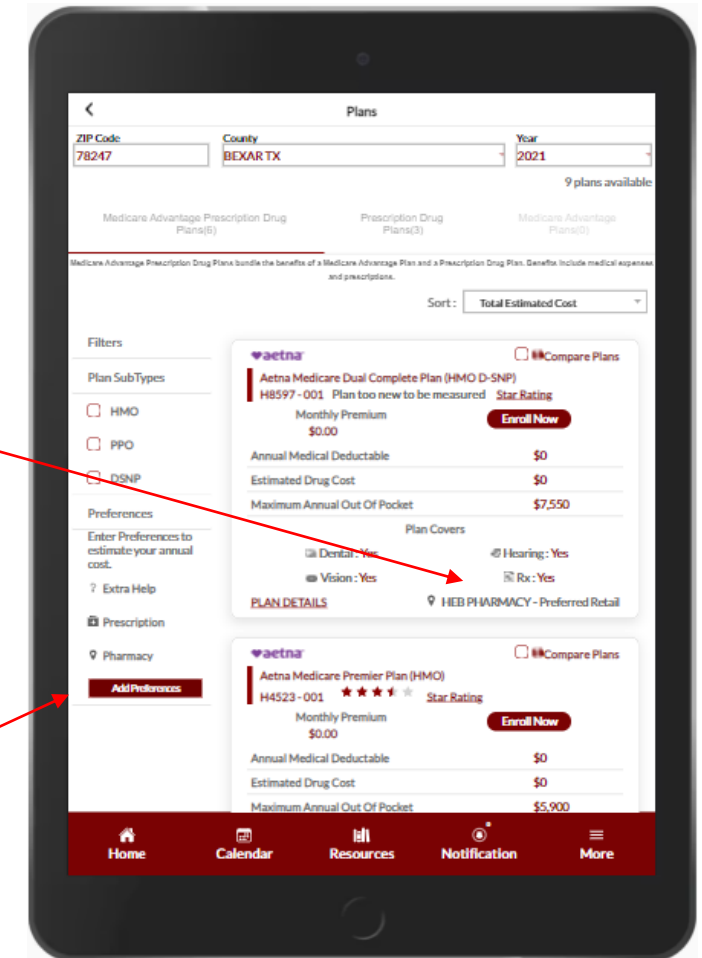
Enroll



Next, you will select the appropriate plan year for enrollment. Multiple plan year selection will be offered during the AEP timeframe.

Preferred Pharmacy locations will display at the plan level based upon the Pharmacy selection/documentation attached to your lead record.

If you have not selected a pharmacy in the lead record, you can do so on this screen by adding preferences. Select **Add Preference** to add **Pharmacy, Prescriptions** and conduct **Extra Help** eligibility checks.



Extra Help and Medicaid Eligibility Check

The screenshot shows the 'Add Preferences' screen with the 'Extra Help' tab selected. The 'Extra Help' radio button is checked. The form contains fields for First Name (Leslie), Last Name (Hall), Date of Birth, and Medicare Number. A red asterisk is next to the Last Name, Date of Birth, and Medicare Number fields. A red button labeled 'Verify Extra Help' is on the right. At the bottom, there is a red bar with a white 'Go To Plans' button and a 'Skip/Continue' link.

Extra Help and **Medicaid** Eligibility fields will auto populate if the criteria is documented on the Lead record.

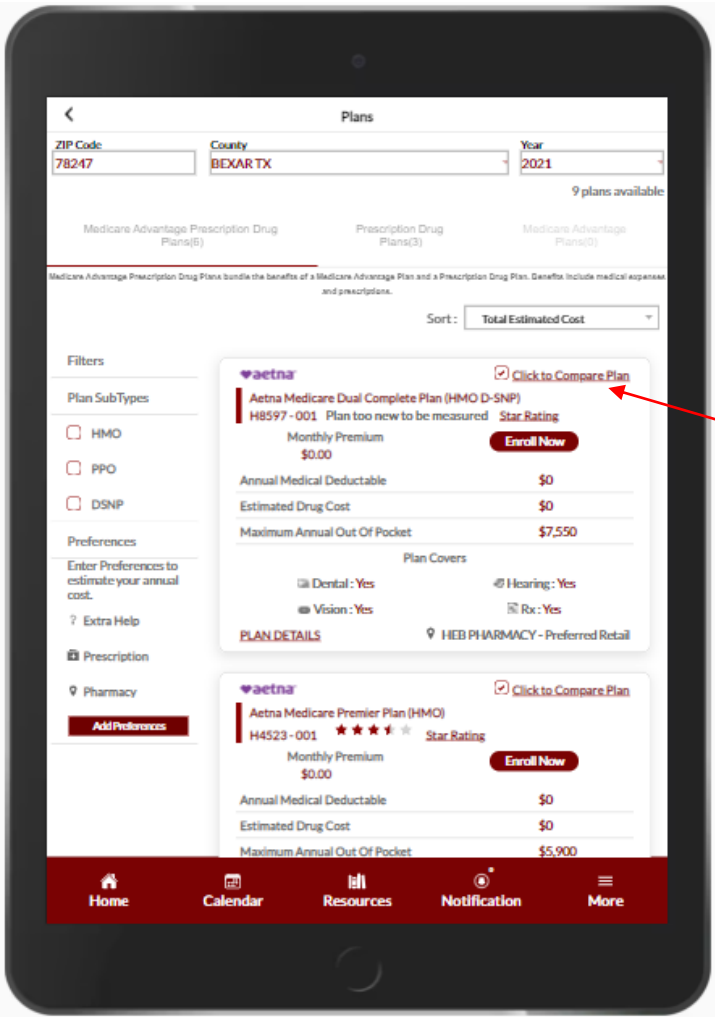
Required fields are denoted by the red asterisk *. Once all required fields are populated, select **Verify Extra Help** or **Verify Medicaid**.

Your results will populate.

To navigate back to plans, select **Go To Plans**.

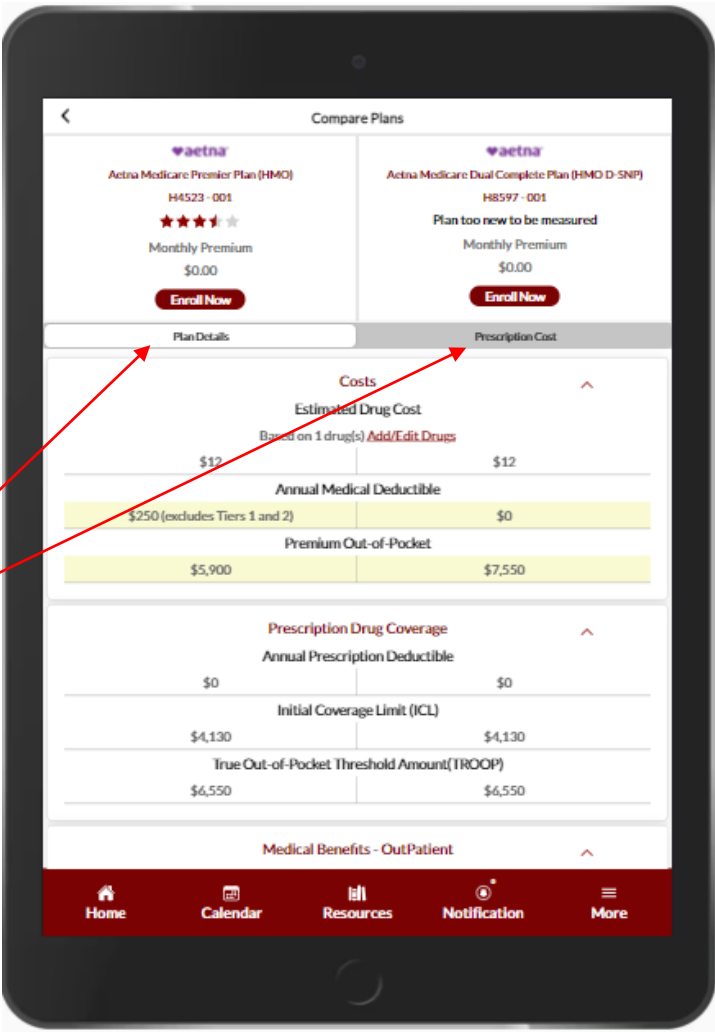
The screenshot shows the 'Add Preferences' screen with the 'Medicaid' tab selected. The 'Medicaid' radio button is checked. The form contains fields for First Name (Leslie), Last Name (Hall), Date of Birth, Gender, Medicare Number, Medicaid Number, Social Security Number, and Medicare State (NY). Red asterisks are next to the Last Name, Date of Birth, Medicare Number, Medicaid Number, Social Security Number, and Medicare State fields. A red button labeled 'Verify Medicaid' is on the right. Below the form, there is a note: 'You may be eligible for Extra Help. This can reduce the Prescription Drug Premium of the Plan you select and will reduce the cost of the Prescription Drugs. You can contact the SSA to find out more details about how much this will lower your cost.' At the bottom, there is a red bar with a white 'Go To Plans' button and a 'Skip/Continue' link.

Compare Plans



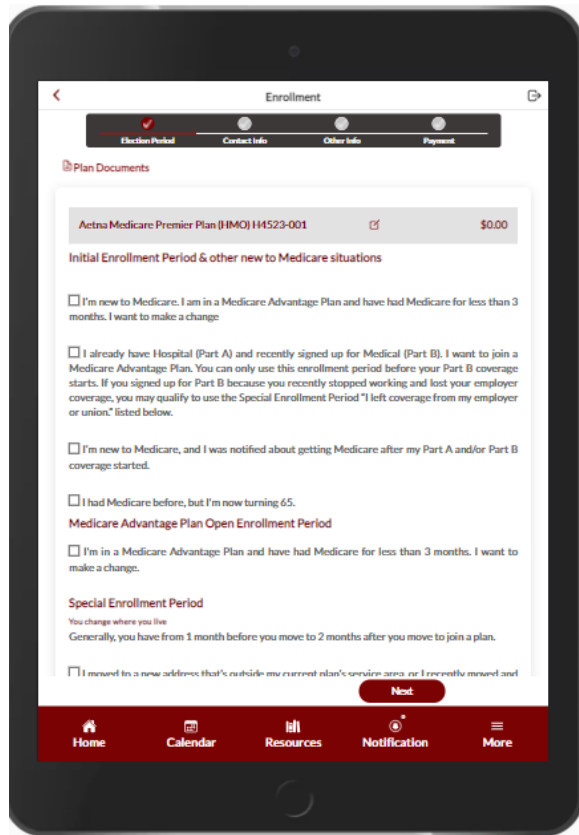
You can compare up to three (3) plans at a time in Think Agent. To compare plans, check the box next to the plans you would like to view. Once your plans have been selected, **Click to Compare Plans**.

The side-by-side comparison will render. **Plan Details** and **Prescription Cost** are on two different pages.



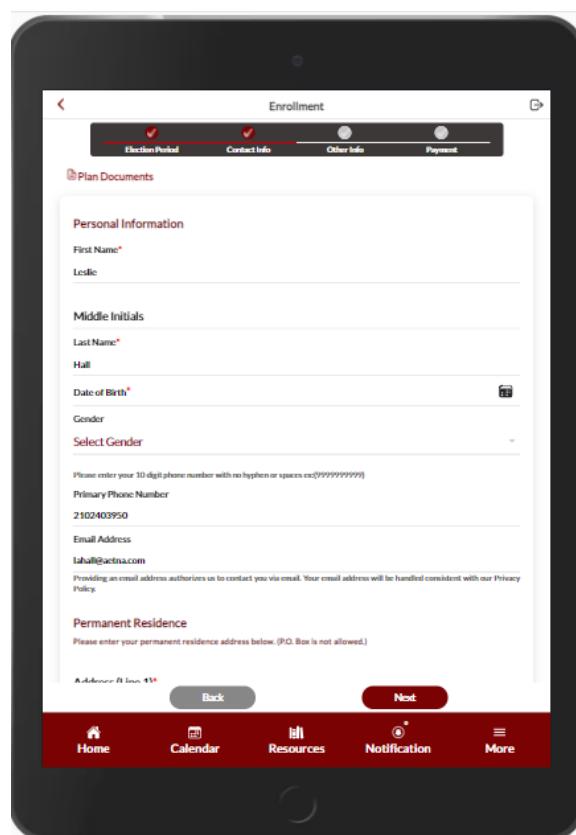
Enrollment Screens

Election Period



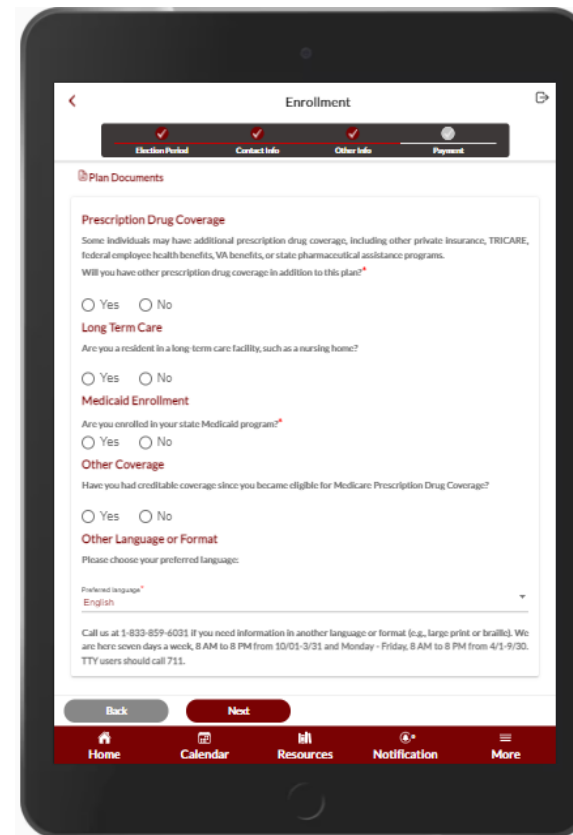
The screen shows the 'Enrollment' process with a progress bar at the top indicating the current step is 'Election Period'. Below the progress bar, there's a 'Plan Documents' section showing 'Aetna Medicare Premier Plan (HMO) H4523-001' with a status of 'Selected' and a premium of '\$0.00'. The main content area is titled 'Initial Enrollment Period & other new to Medicare situations' and contains three checkboxes with explanatory text: 1) 'I'm new to Medicare. I am in a Medicare Advantage Plan and have had Medicare for less than 3 months. I want to make a change.' 2) 'I already have Hospital (Part A) and recently signed up for Medical (Part B). I want to join a Medicare Advantage Plan. You can only use this enrollment period before your Part B coverage starts. If you signed up for Part B because you recently stopped working and lost your employer coverage, you may qualify to use the Special Enrollment Period "I left coverage from my employer or union" listed below.' 3) 'I'm new to Medicare, and I was notified about getting Medicare after my Part A and/or Part B coverage started.' Below these is a section for 'Medicare Advantage Plan Open Enrollment Period' with two checkboxes: 'I had Medicare before, but I'm now turning 65.' and 'I'm in a Medicare Advantage Plan and have had Medicare for less than 3 months. I want to make a change.' The bottom section is 'Special Enrollment Period' with a checkbox for 'I moved to a new address that's outside my current plan's service area or I recently moved and you change where you live. Generally, you have from 1 month before you move to 2 months after you move to join a plan.' A 'Next' button is at the bottom right of the content area. The bottom navigation bar includes Home, Calendar, Resources, Notification, and More.

Contact Info



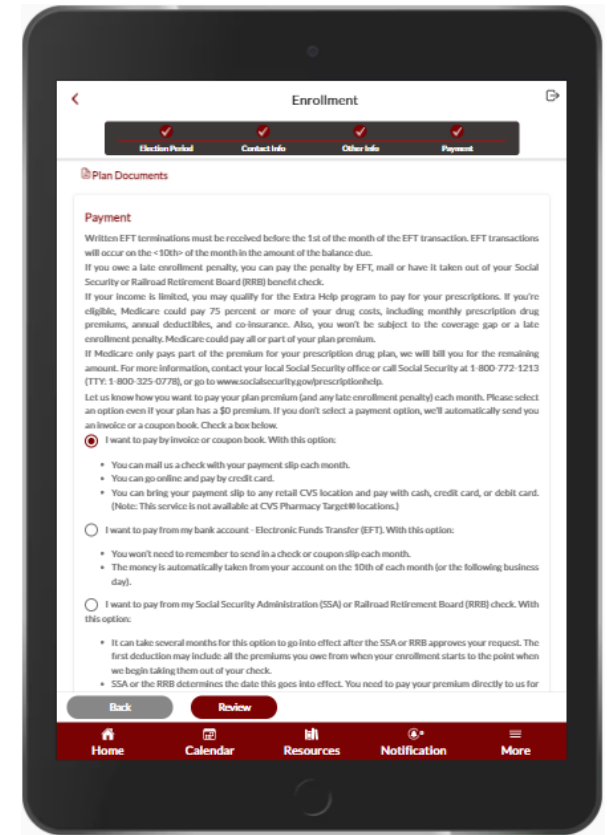
The screen shows the 'Enrollment' process with a progress bar at the top indicating the current step is 'Contact Info'. Below the progress bar, there's a 'Plan Documents' section showing 'Aetna Medicare Premier Plan (HMO) H4523-001' with a status of 'Selected' and a premium of '\$0.00'. The main content area is titled 'Personal Information' and contains several input fields: 'First Name*', 'Last Name*', 'Middle Initials', 'Last Name*', 'Hail', 'Date of Birth*', 'Gender', and 'Select Gender'. Below these is a section for 'Permanent Residence' with a text input field and a note: 'Please enter your permanent residence address below. (P.O. Box is not allowed.)'. A 'Back' button is at the bottom left of the content area, and a 'Next' button is at the bottom right. The bottom navigation bar includes Home, Calendar, Resources, Notification, and More.

Other Info



The screen shows the 'Enrollment' process with a progress bar at the top indicating the current step is 'Other Info'. Below the progress bar, there's a 'Plan Documents' section showing 'Aetna Medicare Premier Plan (HMO) H4523-001' with a status of 'Selected' and a premium of '\$0.00'. The main content area is titled 'Prescription Drug Coverage' and contains a paragraph of text followed by a radio button selection: 'Some individuals may have additional prescription drug coverage, including other private insurance, TRICARE, federal employee health benefits, VA benefits, or state pharmaceutical assistance programs. Will you have other prescription drug coverage in addition to this plan?' with options 'Yes' and 'No'. Below this is a section for 'Long Term Care' with a paragraph of text followed by a radio button selection: 'Are you a resident in a long-term care facility, such as a nursing home?' with options 'Yes' and 'No'. The next section is 'Medicaid Enrollment' with a paragraph of text followed by a radio button selection: 'Are you enrolled in your state Medicaid program?' with options 'Yes' and 'No'. The next section is 'Other Coverage' with a paragraph of text followed by a radio button selection: 'Have you had creditable coverage since you became eligible for Medicare Prescription Drug Coverage?' with options 'Yes' and 'No'. The final section is 'Other Language or Format' with a paragraph of text followed by a radio button selection: 'Please choose your preferred language:' with options 'English' and 'Spanish'. A 'Back' button is at the bottom left of the content area, and a 'Next' button is at the bottom right. The bottom navigation bar includes Home, Calendar, Resources, Notification, and More.

Payment

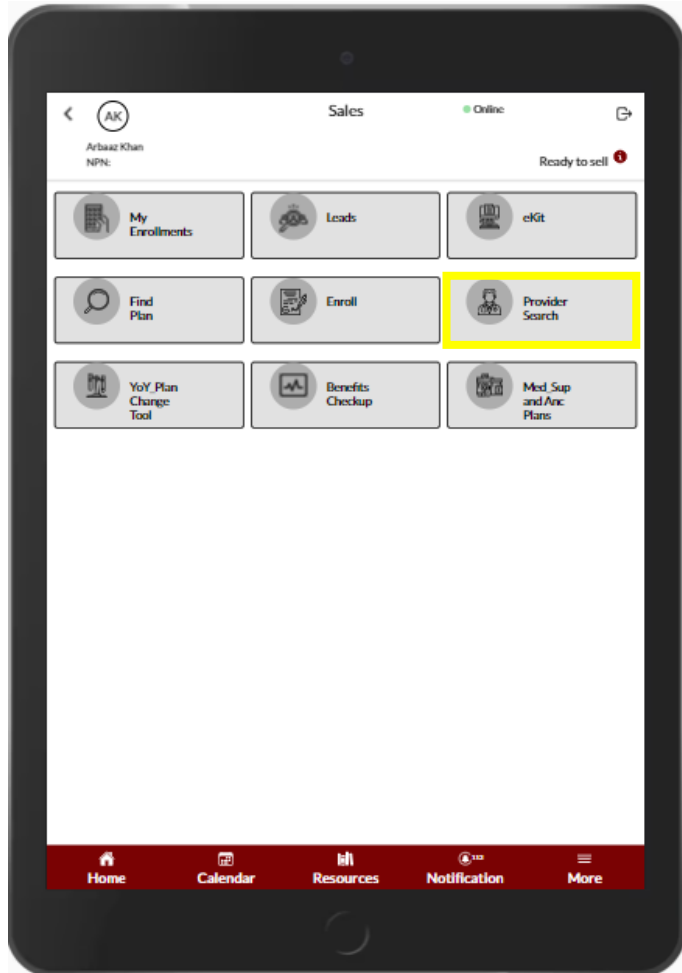


The screen shows the 'Enrollment' process with a progress bar at the top indicating the current step is 'Payment'. Below the progress bar, there's a 'Plan Documents' section showing 'Aetna Medicare Premier Plan (HMO) H4523-001' with a status of 'Selected' and a premium of '\$0.00'. The main content area is titled 'Payment' and contains a paragraph of text followed by a radio button selection: 'Written EFT terminations must be received before the 1st of the month of the EFT transaction. EFT transactions will occur on the 15th of the month in the amount of the balance due. If you owe a late enrollment penalty, you can pay the penalty by EFT, mail, or have it taken out of your Social Security or Railroad Retirement Board (RRB) benefit check. If your income is limited, you may qualify for the Extra Help program to pay for your prescriptions. If you're eligible, Medicare could pay 75 percent or more of your drug costs, including monthly prescription drug premiums, annual deductibles, and co-insurance. Also, you won't be subject to the coverage gap or a late enrollment penalty. Medicare could pay all or part of your plan premium. If Medicare only pays part of the premium for your prescription drug plan, we will bill you for the remaining amount. For more information, contact your local Social Security office or call Social Security at 1-800-772-1213 (TTY: 1-800-325-0778), or go to www.socialsecurity.gov/prescriptionhelp. Let us know how you want to pay your plan premium (and any late enrollment penalty) each month. Please select an option even if your plan has a \$0 premium. If you don't select a payment option, we'll automatically send you an invoice or a coupon book. Check a box below.' Below this is a section for 'I want to pay by invoice or coupon book. With this option:' with a list of bullet points: 'You can mail us a check with your payment slip each month.', 'You can go online and pay by credit card.', 'You can bring your payment slip to any retail CVS location and pay with cash, credit card, or debit card. (Note: This service is not available at CVS Pharmacy Target locations.)'. The next section is 'I want to pay from my bank account - Electronic Funds Transfer (EFT). With this option:' with a list of bullet points: 'You won't need to remember to send in a check or coupon slip each month.', 'The money is automatically taken from your account on the 15th of each month (for the following business day)'. The final section is 'I want to pay from my Social Security Administration (SSA) or Railroad Retirement Board (RRB) check. With this option:' with a list of bullet points: 'It can take several months for this option to go into effect after the SSA or RRB approves your request. The first deduction may include all the premiums you owe from when your enrollment starts to the point when we begin taking them out of your check.', 'SSA or the RRB determines the date this goes into effect. You need to pay your premium directly to us for'. A 'Back' button is at the bottom left of the content area, and a 'Review' button is at the bottom right. The bottom navigation bar includes Home, Calendar, Resources, Notification, and More.

Provider Search



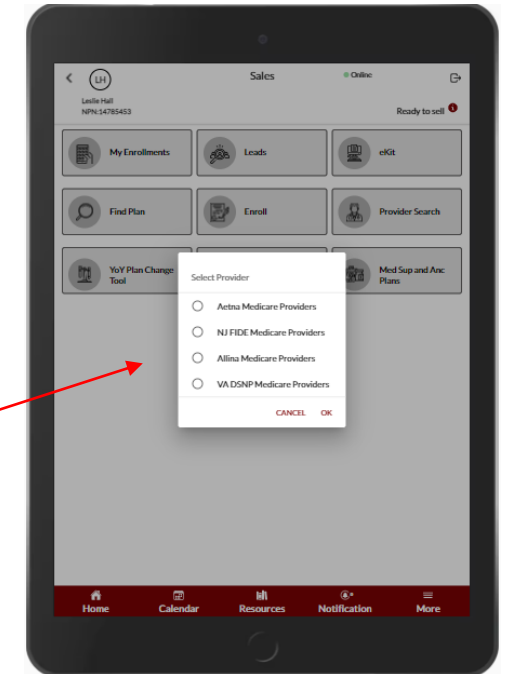
Provider Search



The **Provider Search** feature will take you to Aetna Medicare Doc Find. You can find doctors and pharmacies within a network and search for other providers like dentists or specialists.

To select a provider, click **Provider Search**. Next, make the following selection:

- **Aetna Medicare Providers**
- **NJ FIDE Medicare Providers**
- **Allina Medicare Providers**
- **VA DSNP Medicare Providers**



Year Over Year Plan Change Tool



Year Over Year Plan Change Tool



Aetna's **Year Over Year Plan Change Tool** is a great way to inform your existing clients on changes to their existing plans!

You can demonstrate side by side plan comparisons and changes will be denoted in **Yellow**. You can even cost **calculate** Premium, PCP Copay, Specialist Copay and Inpatient Hospital Stay changes by entering in the number of visits per year expected!

Aetna Medicare Premier Plan (HMO) H4523 - 001 - MAPD	
2020	2021
Here's what changed	
Plan differences	
CALCULATE	

Year Over Year Plan Change Tool

What's your zip code?

Zip Code*

County*

Select County

Plan*

Select Plan

NEXT

♥aetna icare Premier Plan (HMO) 523 - 001 - MAPD 2020	♥aetna Aetna Medicare Premier Plan (HMO) H4523 - 001 - MAPD 2021
Plan differences CALCULATE	
Plan Information Monthly Premium \$0 \$0 Deductible This plan does not have a deductible. This plan does not have a deductible. Maximum Out-of-Pocket (MOOP) \$5,500 \$5,900 N/A N/A	

Start by entering in your **desired Zip Code**. Then select your **Plan** and click **Next**.

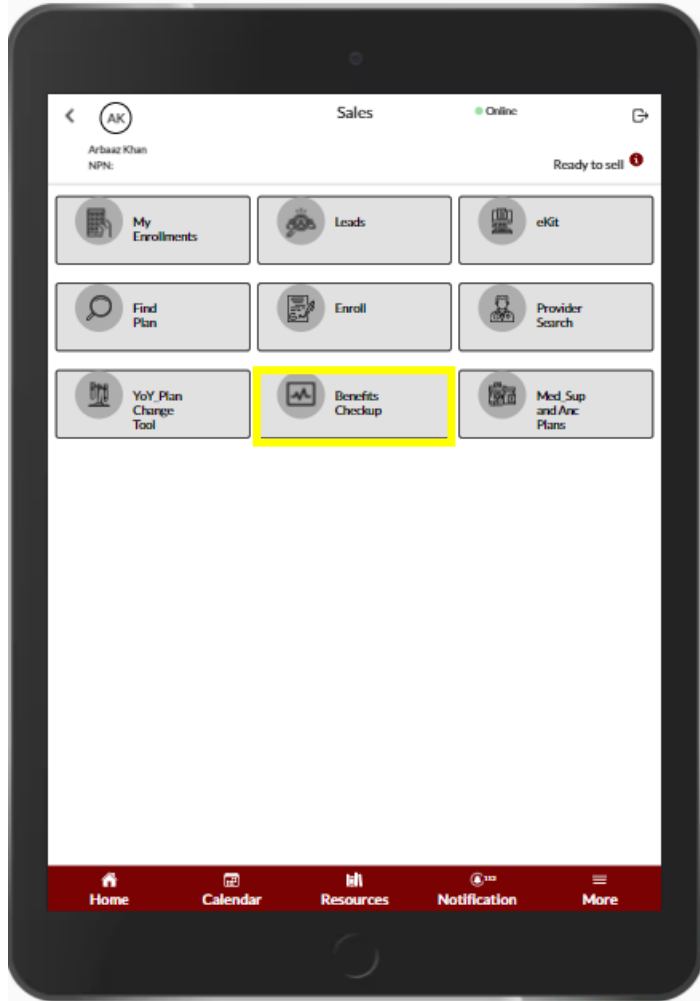
A side-by-side plan comparison will render. Changes are denoted in yellow.

To calculate cost, select **Calculate**.

Benefits Check Up



Benefits Check Up



Benefits Check Up is a free service of the National Council on Aging (NCOA). It is an online screening tool that can help members find benefits they may be eligible for from over 2,500 federal, state and private programs.

Benefits Check Up may help with the following expenses:

- **Medications**
- **Food**
- **Utilities**
- **Legal Assistance**
- **Health Care**
- **Housing**
- **Property Taxes**
- **Transportation**
- **Employment Training**

ncoa | BenefitsCheckUp | aetna

Welcome to BenefitsCheckUp®

BenefitsCheckUp helps you find and enroll in public and private benefits programs. You can also find an online application for Medicare's Extra Help. It's simple and always includes the most up-to-date information. Please select your Aetna™ BenefitsCheckUp website to get started.

Aetna™ BenefitsCheckUp® Private Labels

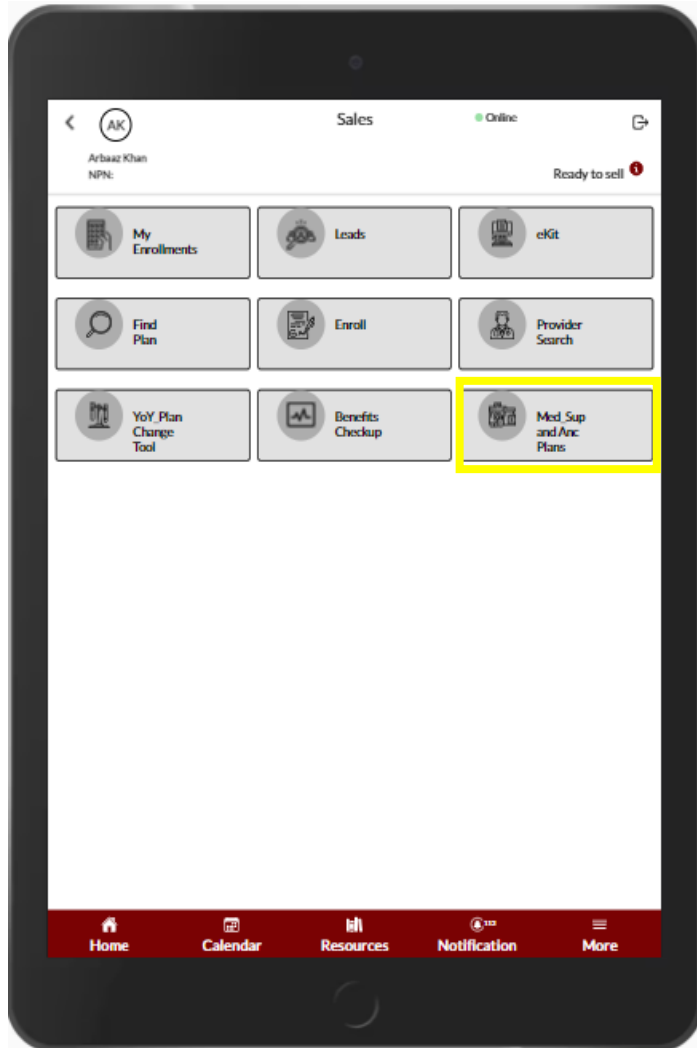
Aetna

Enter

Medicare Supplement and Ancillary Plans



Medicare Supplement and Ancillary Plans



At Aetna, we believe in portfolio selling. Enrolling beneficiaries into Medicare Supplement and Ancillary plans is easy in Think Agent!

Simply click the **Med Sup and Anc Plan** card to take you to the Aetna Senior Supplemental Insurance site.

You'll need to enter your portal's **Username** and **Password** to access. Contact your local Med Supp team for more information.

Retail



What is the Retail opportunity?

The Retail program is an opportunity to work together in building a prospect pipeline to increase sales year-round.

The Retail program provides access to high-traffic retail locations and is low cost for the agent.

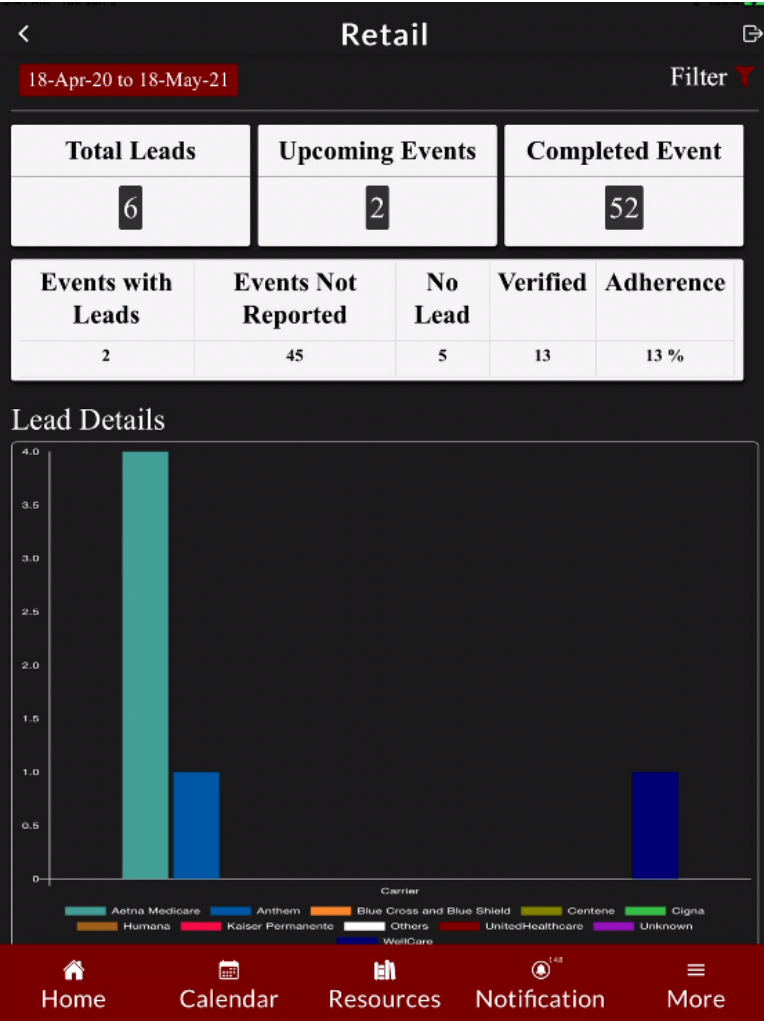
Cost efficient retail bundles are competitively priced and drive a consistent look and feel across all events.

Agents who adhere to the program are given \$100 in Medicare Marketing Studio credit post AEP! ** 90% adherence must be achieved.*

Contact your local Broker Manager to get started!



Retail – Your Home Screen Dashboard



The Retail events and leads dashboard is a high-level view of activity.

Filtering date ranges will adjust the entire dashboard.

The first component will show the agent **Total Leads, Upcoming Events** and **Completed Events** for all their activity.

The second component will aggregate **Events with Leads, Events not Reported, Events with No Leads, Verified Events** and the agent’s **Adherence** to the program.

Once leads are added, the third component will graph leads by carrier.

Please see the next slide for definitions.

Dashboard definitions

Date Range – the data the dashboard is reflecting.

Filter – adjusts the date range for data.

Total Leads – leads you have reported.

Upcoming Events – the total number of upcoming events.

Completed Events – the total number of events you have completed.

Events with Leads – total events where you received and reported leads.

Events not Reported – total events where you did not report leads.

No Lead – total events where you received 0 leads and you clicked the No Leads box.

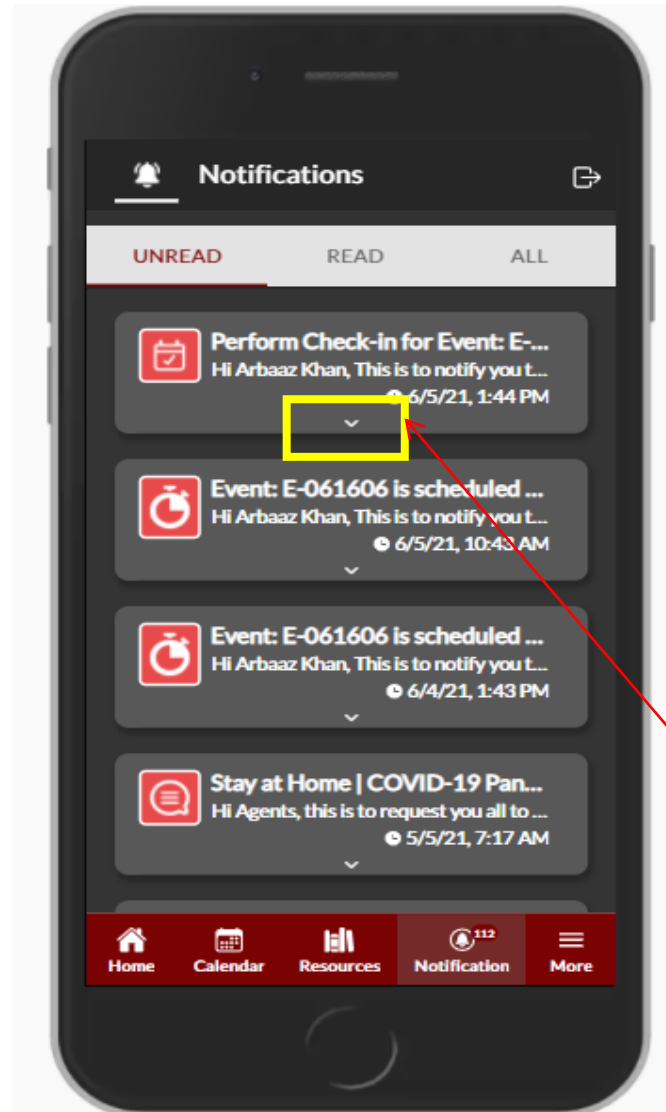
Verified – total number of events you checked in and out of. Think Agent automatically checks you out when you disposition leads.

Adherence – percentage of total completed events you verified and reported leads on.

Lead Details – a bar chart that shows lead numbers reported per carrier.



Retail - Notifications



Notifications are important updates regarding events.

Event Check-in reminders remind the agent to check into their events.

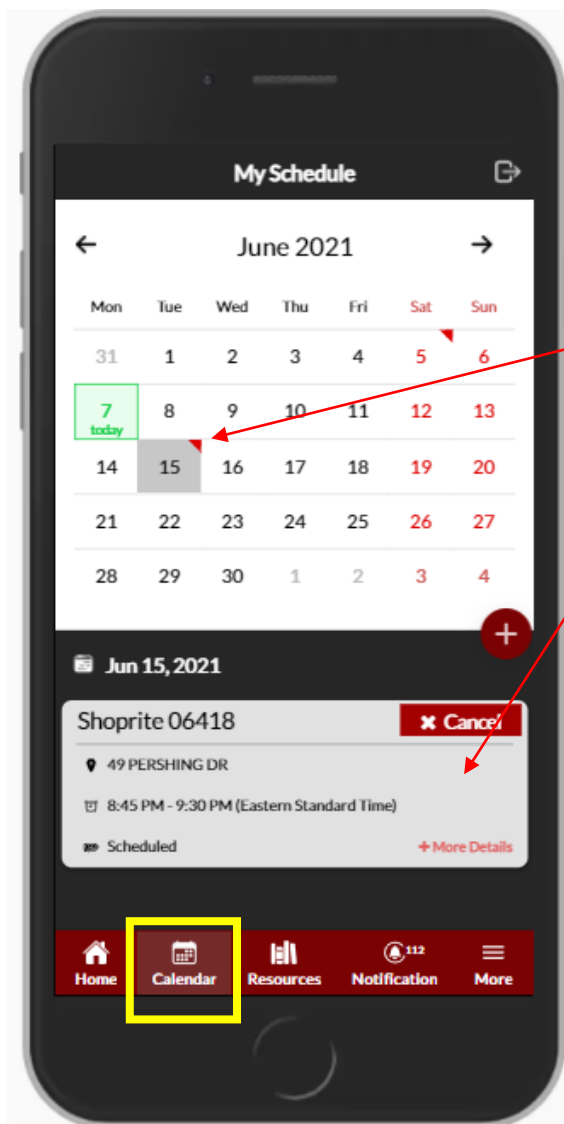
Newly Scheduled Events are events you have requested through Think Agent and are now approved and show in your calendar.

Lead Input reminders remind the agent to enter leads on past due scheduled events.

Pending Events and **Cancellation** request are also visible.

Click on a notifications **down arrow** to check, read or remove from your list of notifications.

Calendar of Events



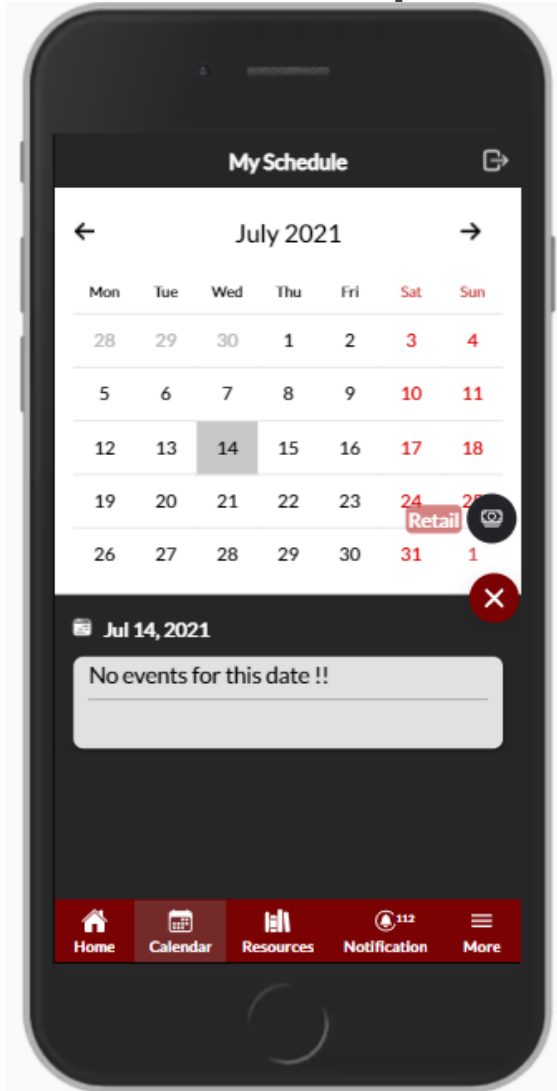
Click on the **Calendar** at the bottom of your Home screen. Your calendar will display your scheduled events.

Scheduled events are notated by a **red** triangle.

Event details will display by clicking on the day. Information about the event will display below the calendar. You will be able to see:

- Date of event
- Retailer
- Address
- Time and duration of event

Retail – Requesting Events



Did you know that you can request Retail events on Think Agent? You can!

Retail events can be requested **18 days in the future.**

To request a Retail event, please access your calendar, select your preferred day and click the + sign. You will be presented with the **Retail icon**. Select the icon to advance to the next screen.

Retail – Requesting Events

Next, enter in a zip code and adjust miles if applicable.

Select your location and enter in Start and End times and click Submit.

Retail – What happens next?

HEB 78247
📍 17238 BULVERDE RD
🕒 2:00 PM - 3:00 PM (Central Standard Time)
📱 Pending BM Approval

Shoprite 6484
📍 875 BRIDGEPORT AVE
🕒 9:00 AM - 10:00 AM (Eastern Standard Time)
📱 Request Sent to Store

Shoprite 06418 ✖ Cancel
📍 49 PERSHING DR
🕒 4:30 PM - 7:30 PM (Eastern Standard Time)
📱 Scheduled + More Details

Shoprite 6614
📍 250 BARNUM AVENUE CUTOFF
🕒 7:00 PM - 11:00 PM (Eastern Standard Time)
📱 BM Rejected

When you submit your event through Think Agent, the event status will state **Pending BM Approval**. Your Broker Manager will have 4 days to review and approve your event submission. Broker Managers are automatically notified when you submit an event for approval.

Your event status will change to **Request Sent to Store** once your Broker Manager approves the event.

Your event status will change to **Scheduled** when your Broker Manager and the store approves your date and time request.

The **BM Rejected** status means that your Broker Manager did not approve your scheduled date and time submission.

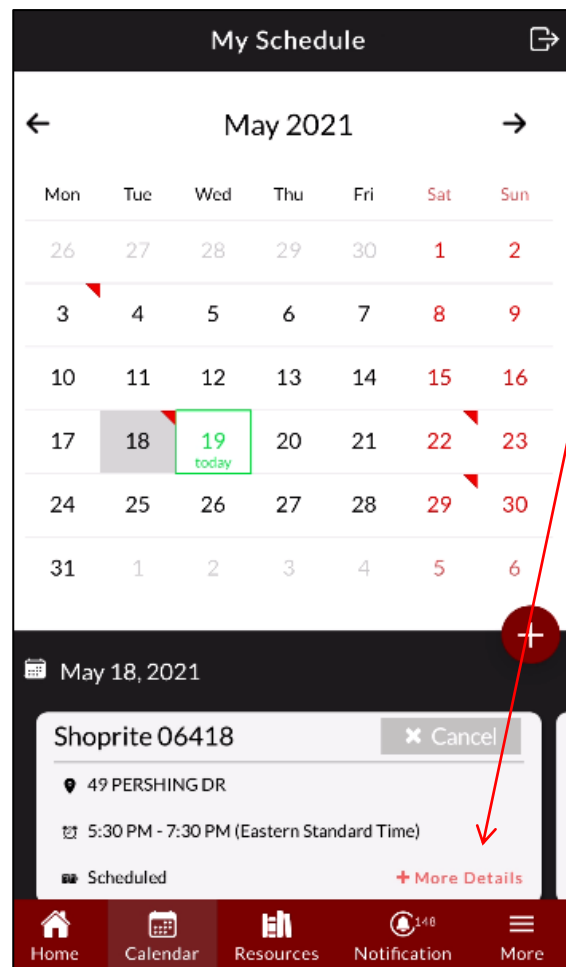
CVS 15236
📍 5242 CLAIRTON BLVD
🕒 11:00 AM - 12:00 PM (Eastern Standard Time)
📱 Rejected by Store

Rejected by Store means that the store rejected your event submission because the store had no availability to have you there.

CVS 32606
📍 4354 NW 23RD AVE
🕒 4:30 PM - 7:30 PM (Eastern Standard Time)
📱 Pending Cancellation Approval + More Details

You will see the **Pending Cancellation Approval** status when you cancel a scheduled event through Think Agent. Your Broker Manager has 2 days to process your cancellation request.

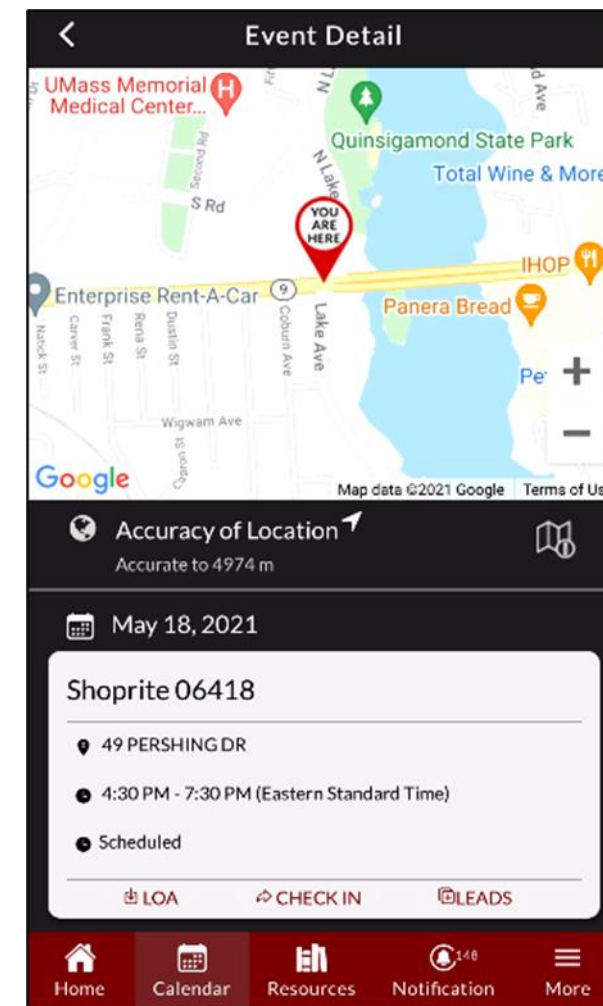
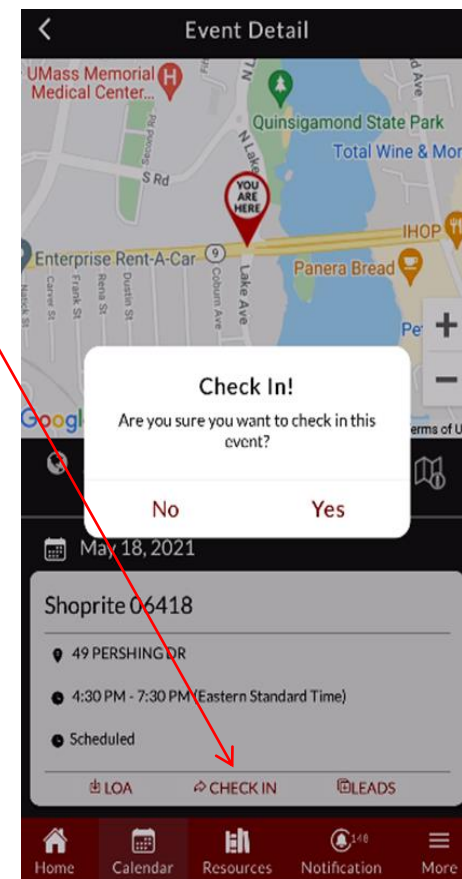
Retail – Manually checking into your event



To check into your event, select today's date on the calendar and select the **+ More Details** tab on the event card. You can check in to events ½ hour before your event.

A pop-up notification will present and ask you to confirm you want to check into the event. Please select **Yes**.

After your event, please come back to Think Agent and add your **leads**. Adding leads will automatically check you out of your event.



Retail – Automatically checking into event

In the future, Think Agent will automatically check you into events when the application uses your current location. Be sure to allow when the notification pops up on your screen.



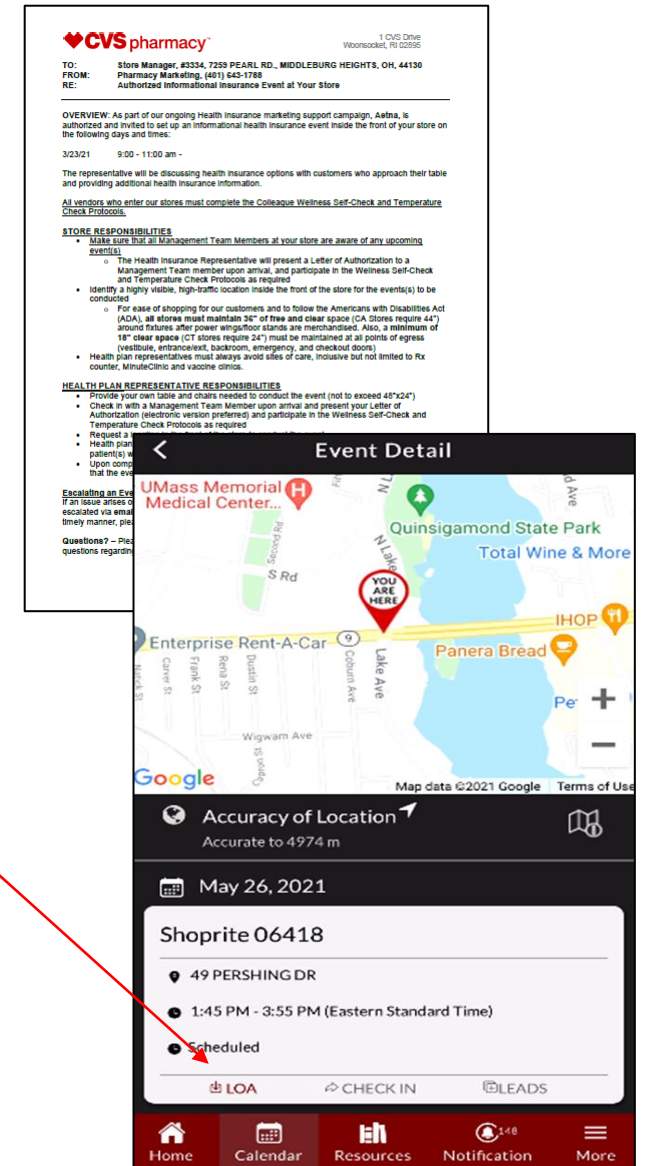
Retail – Letter of Authorization (LOA)

A **Letter of Authorization** or **LOA** permits you to conduct an event at your scheduled location. CVS Health requires a LOA for every event you conduct.

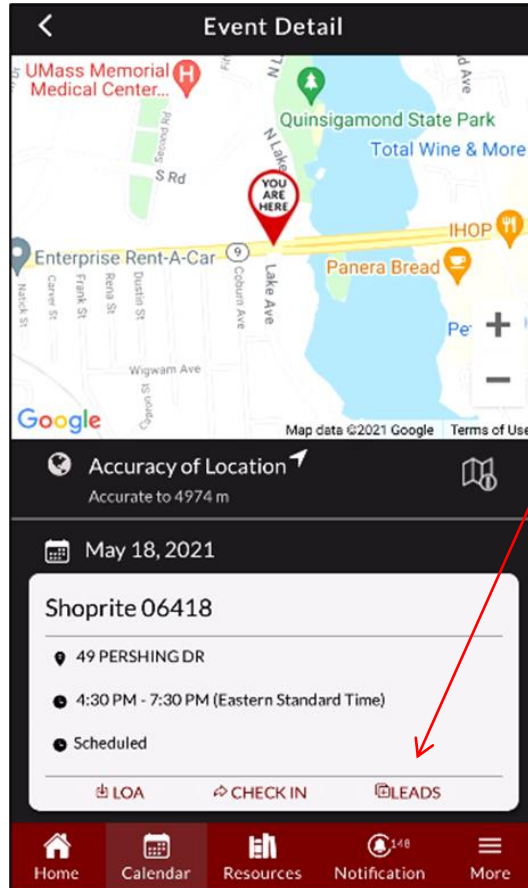
Show this LOA to any store personnel when you first meet with them and on the day of your event. There is a CVS Health phone number on the LOA form that the store can use to contact if there are any questions.

To find your event LOA, click the calendar on your Home screen. Click the date of your event on the calendar and select your event in the gray box.

Click LOA to open the LOA for your event.



Retail - Leads



Documenting leads automatically checks you out of your event!

Lead documentation is an important component of participation in the Retail program.

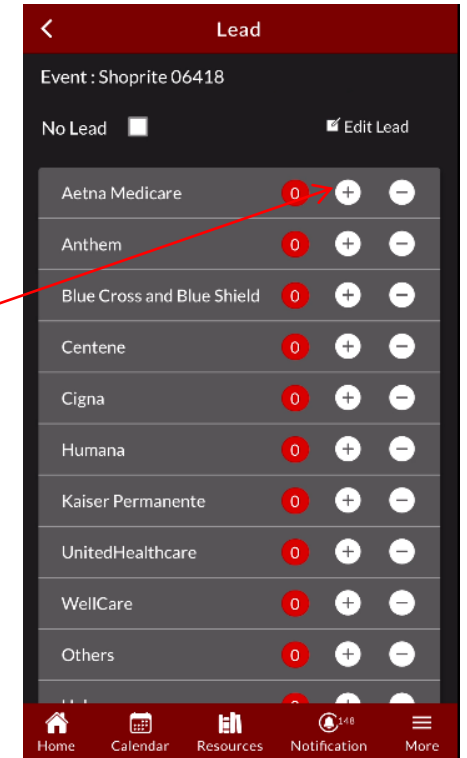
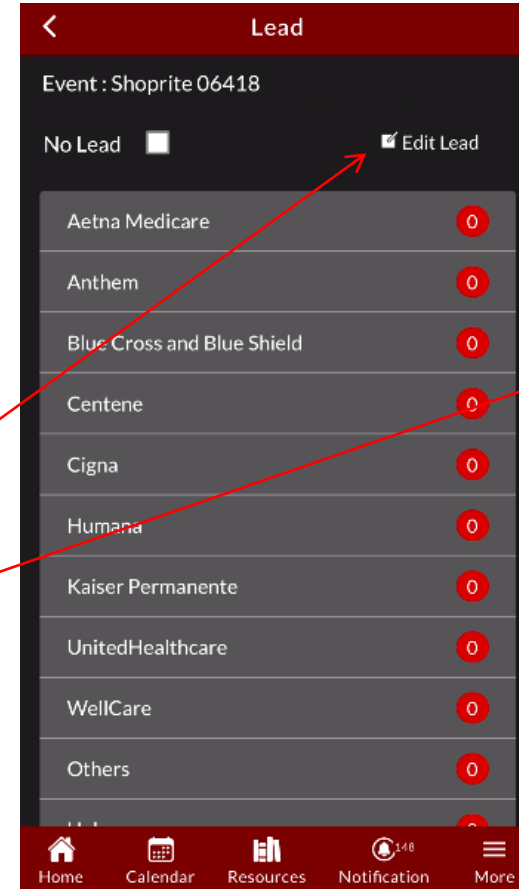
To document leads, please select **Leads** on the event card. The lead template will open.

To add leads, please select **Edit Lead**.

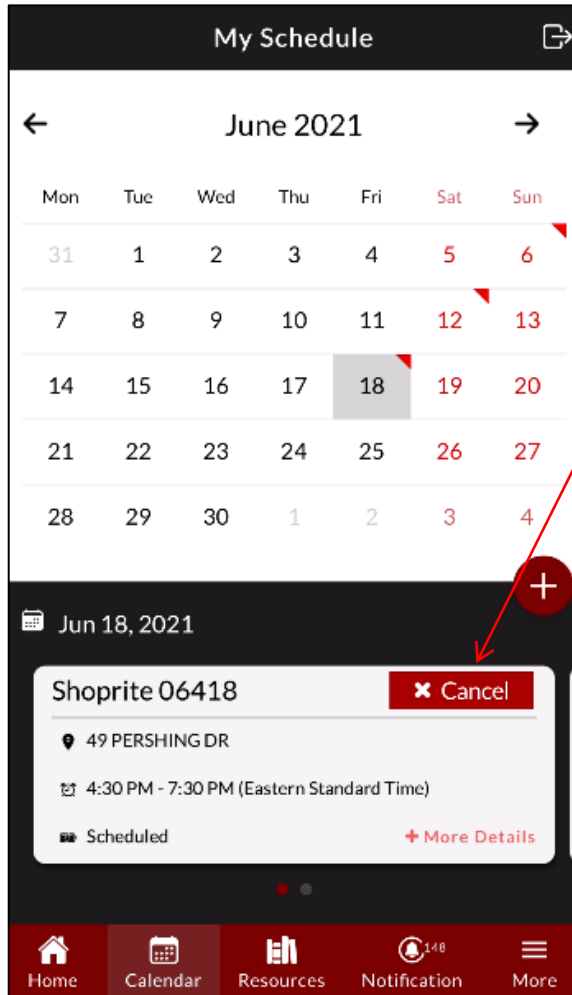
Hit the **+** sign by the name of the carrier.

Your changes automatically save! You are now checked out of your event!

You will have 30 days to enter in leads into Think Agent. You will receive push notifications for events that require lead entries.



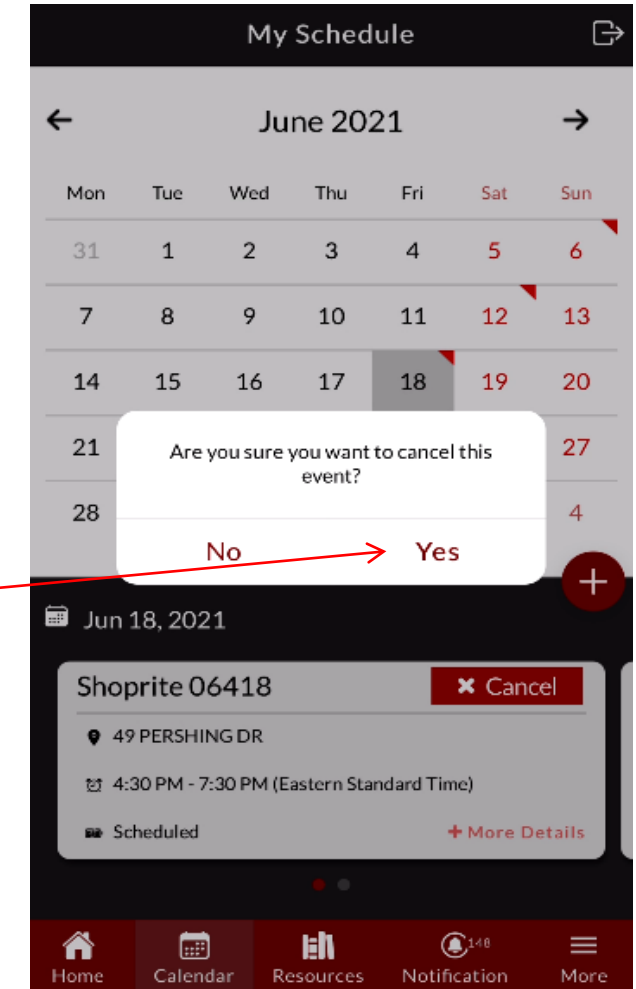
Retail – Cancelling events



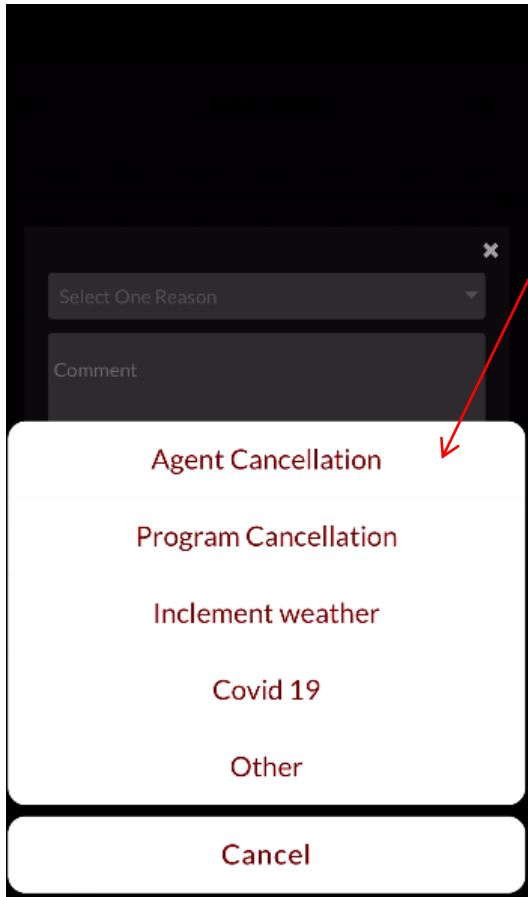
Did you know that you can cancel events on Think Agent? You can!

To cancel your event, navigate to the day on your calendar and select **Cancel** on the event card.

A pop up will present and ask if you are sure you want to cancel the event. Select **Yes**.



Retail – Cancelling events

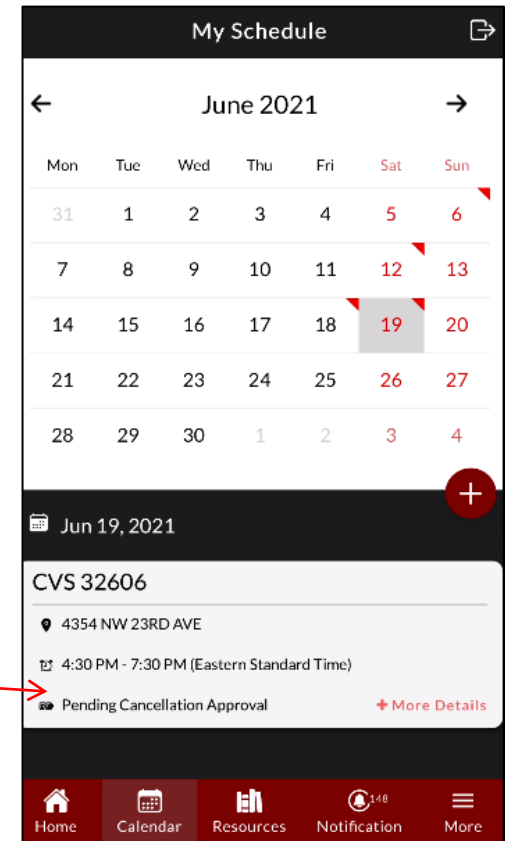
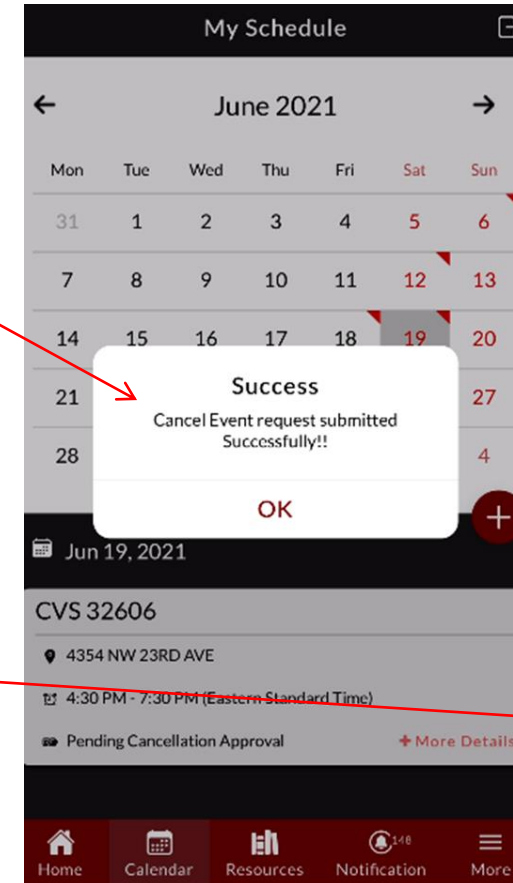


A screenshot of a mobile app interface for cancelling an event. It features a dark header with a close button (X). Below the header is a dropdown menu labeled "Select One Reason" and a text input field labeled "Comment". A white modal is open, displaying a list of reasons: "Agent Cancellation", "Program Cancellation", "Inclement weather", "Covid 19", and "Other". At the bottom of the modal is a "Cancel" button. A red arrow points from the "Agent Cancellation" option to the text in the second paragraph.

In order to process an event cancellation, you will need to provide a reason for the cancellation.

Once you have submitted your reason, a pop up will present to confirm your event cancellation request has been processed.

Your Broker Manager will be notified of the cancellation request and will have 2 days to approve. Your event status will reflect **Pending Cancellation Approval** until the request is approved.

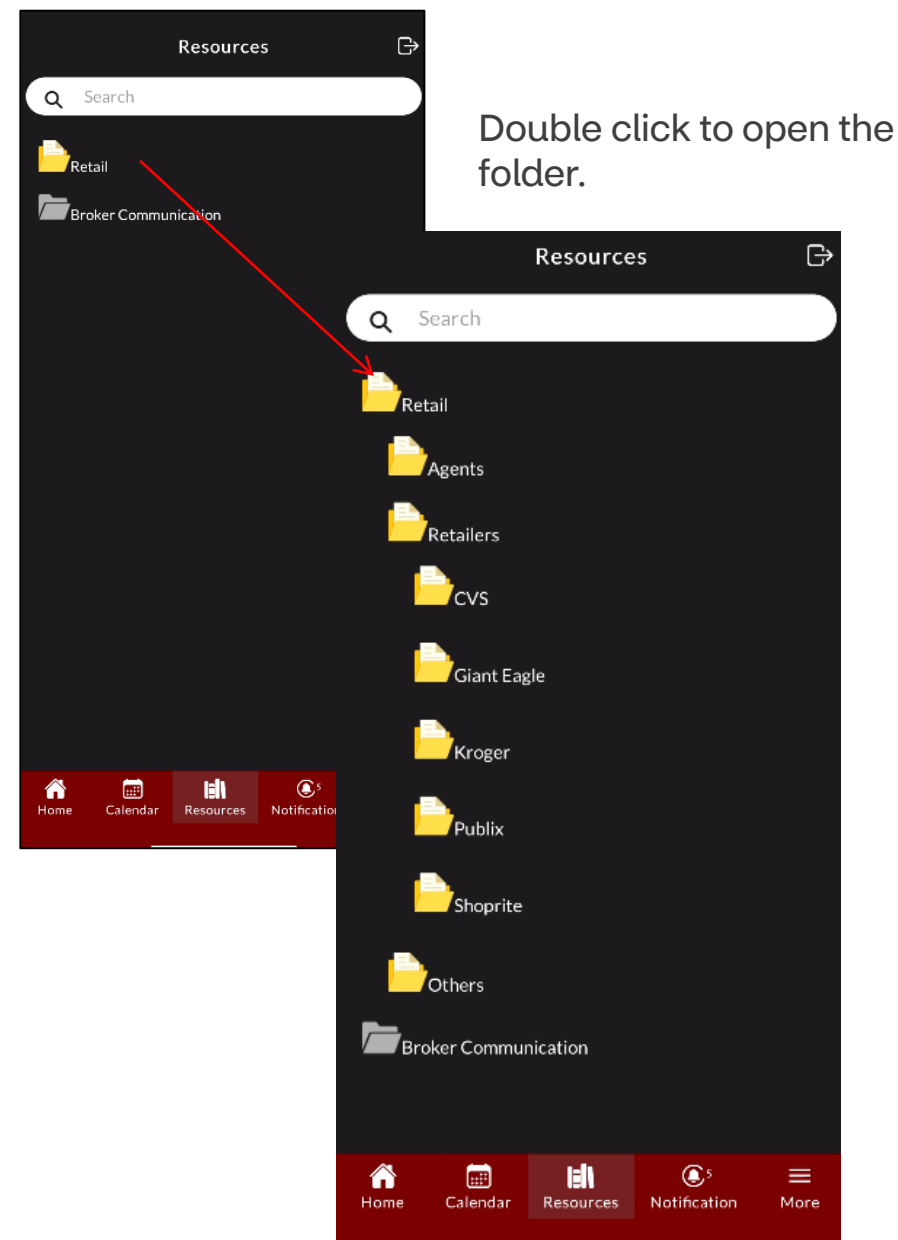
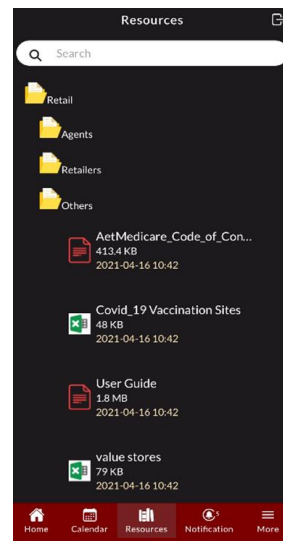
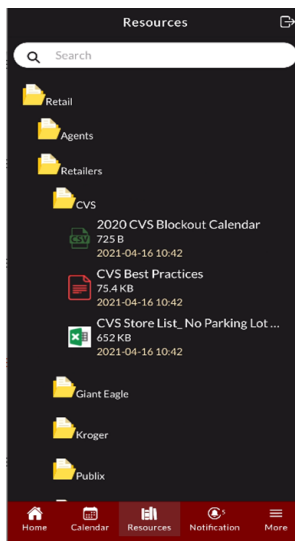
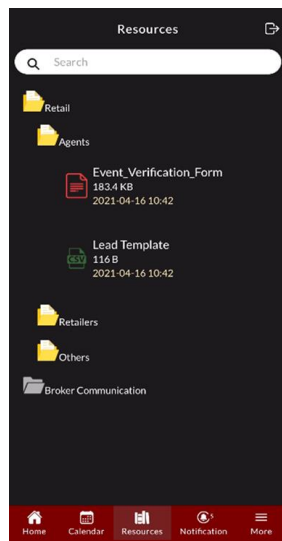


Retail - Resources

Resources are materials and/or guidelines that are used in support of the Retail program.

In the Retail Resource folder, you can find:

- Event Verification Forms
- Lead Template
- Retail Blackout Calendars
- Best Practices
- User Guide



HRA



HRA – Health Risk Assessment

At Aetna, we take a total approach to health, which means not only taking care of our members when they are sick but keeping them healthy as well.

To help us guide them on their path to better health, the HRA will help us understand if they:

- Have any chronic conditions, such as diabetes, congestive heart failure or high blood pressure
- Routinely receive preventive screenings, or they have limitations in moderate activities, such as, pushing a vacuum or moving a table
- Have difficulty or need help doing day to day living activities, such as, eating, bathing, or getting dressed.



HRA – Health Risk Assessment

HEALTH QUESTIONNAIRE

Agent Questionnaire HRA Questionnaire

Member Name: Testfirstname
Testlastname Plan Name: Aetna plan A

1. Please specify lead source

Select

2. What is the enrollment type?

☐ Face to face

☐ Telephone

☐ Online

☐ Paper

3. How easily member agreed to complete HRA?

☐ Somewhat easily

☐ Needed some explanation

☐ Required a lot of explanations

4. How comfortable you feel asking health-related questions?

☐ Somewhat comfortable

☐ Neither comfortable nor uncomfortable

☐ Very uncomfortable

PROCEED TO HRA

First, agents will complete a simple agent level questionnaire.

Next, they will begin the HRA.

Advance to the next screen by clicking Next.

HEALTH QUESTIONNAIRE

Agent Questionnaire HRA Questionnaire

Member Name: Testfirstname
Testlastname Plan Name: Aetna plan A

We want to thank you for choosing to enroll with Aetna plan A to cover your health care needs. As you move to your new plan, we would like to ask some basic questions about you and your health. The information you provide may help us to identify care programs and resources that will benefit you.

1. To start, may I please confirm the telephone number you entered in your enrollment application or the best number to reach you?

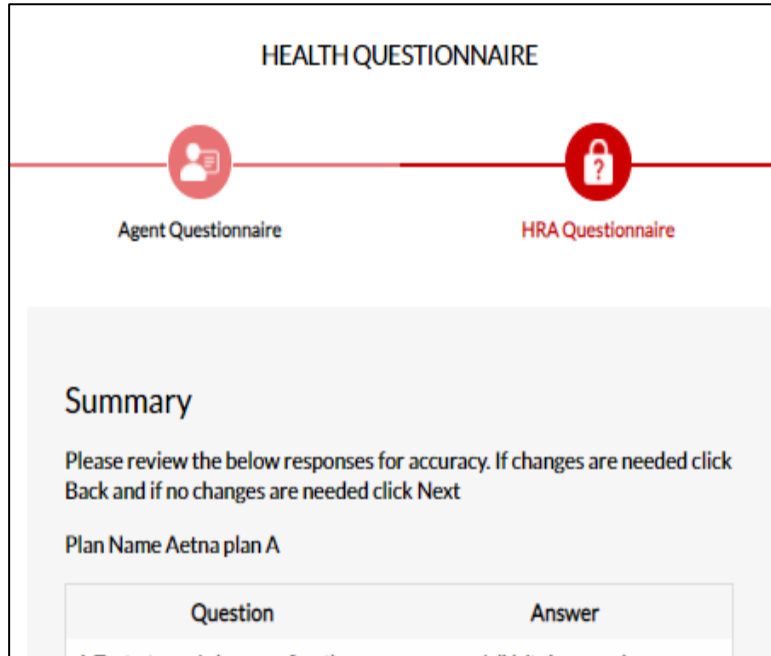
☐ Yes

☐ No

☐ I didn't give a number

CANCEL BACK NEXT

HRA – Health Risk Assessment



HEALTH QUESTIONNAIRE

Agent Questionnaire HRA Questionnaire

Summary

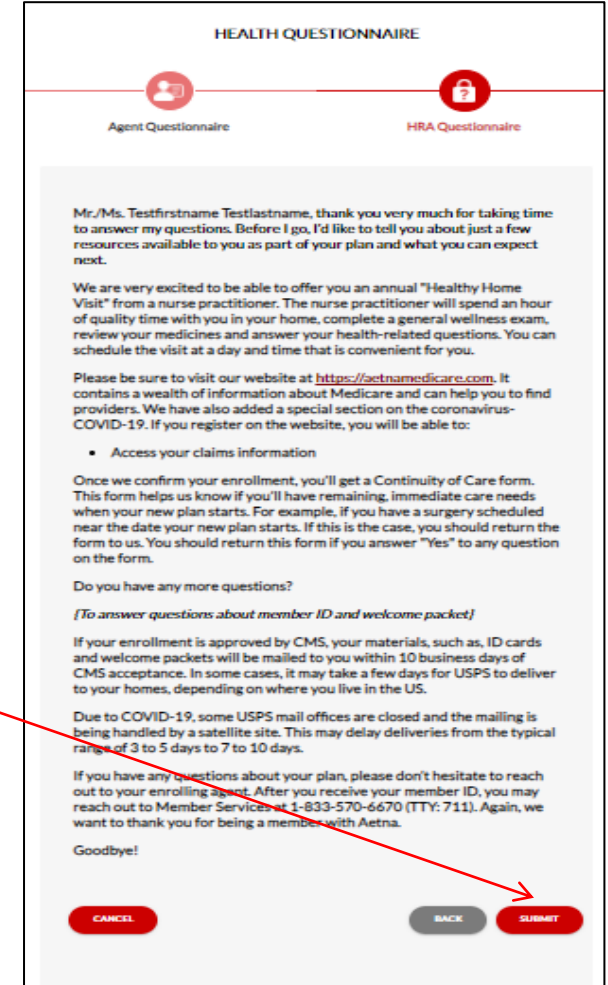
Please review the below responses for accuracy. If changes are needed click Back and if no changes are needed click Next

Plan Name Aetna plan A

Question	Answer
----------	--------

You will be presented with a summarization of your HRA answers. Once reviewed, please select Next.

This will take you to the HRA submission page. Please read the language provided to you on the page to the beneficiary and click **Submit**.



HEALTH QUESTIONNAIRE

Agent Questionnaire HRA Questionnaire

Mr./Ms. Testfirstname Testlastname, thank you very much for taking time to answer my questions. Before I go, I'd like to tell you about just a few resources available to you as part of your plan and what you can expect next.

We are very excited to be able to offer you an annual "Healthy Home Visit" from a nurse practitioner. The nurse practitioner will spend an hour of quality time with you in your home, complete a general wellness exam, review your medicines and answer your health-related questions. You can schedule the visit at a day and time that is convenient for you.

Please be sure to visit our website at <https://aetnamedicare.com>. It contains a wealth of information about Medicare and can help you to find providers. We have also added a special section on the coronavirus-COVID-19. If you register on the website, you will be able to:

- Access your claims information

Once we confirm your enrollment, you'll get a Continuity of Care form. This form helps us know if you'll have remaining, immediate care needs when your new plan starts. For example, if you have a surgery scheduled near the date your new plan starts. If this is the case, you should return the form to us. You should return this form if you answer "Yes" to any question on the form.

Do you have any more questions?

[To answer questions about member ID and welcome packet]

If your enrollment is approved by CMS, your materials, such as, ID cards and welcome packets will be mailed to you within 10 business days of CMS acceptance. In some cases, it may take a few days for USPS to deliver to your homes, depending on where you live in the US.

Due to COVID-19, some USPS mail offices are closed and the mailing is being handled by a satellite site. This may delay deliveries from the typical range of 3 to 5 days to 7 to 10 days.

If you have any questions about your plan, please don't hesitate to reach out to your enrolling agent. After you receive your member ID, you may reach out to Member Services at 1-833-570-6670 (TTY: 711). Again, we want to thank you for being a member with Aetna.

Goodbye!

CANCEL BACK SUBMIT

Permission to Contact



Coming Soon!

Resources



Resources

Resources are materials and/or guidelines that are used in support of Sales and Marketing efforts.

In the Retail Resource folder, you can find:

- Event Verification Forms
- Lead Template
- Retail Blackout Calendars
- Best Practices
- User Guide

