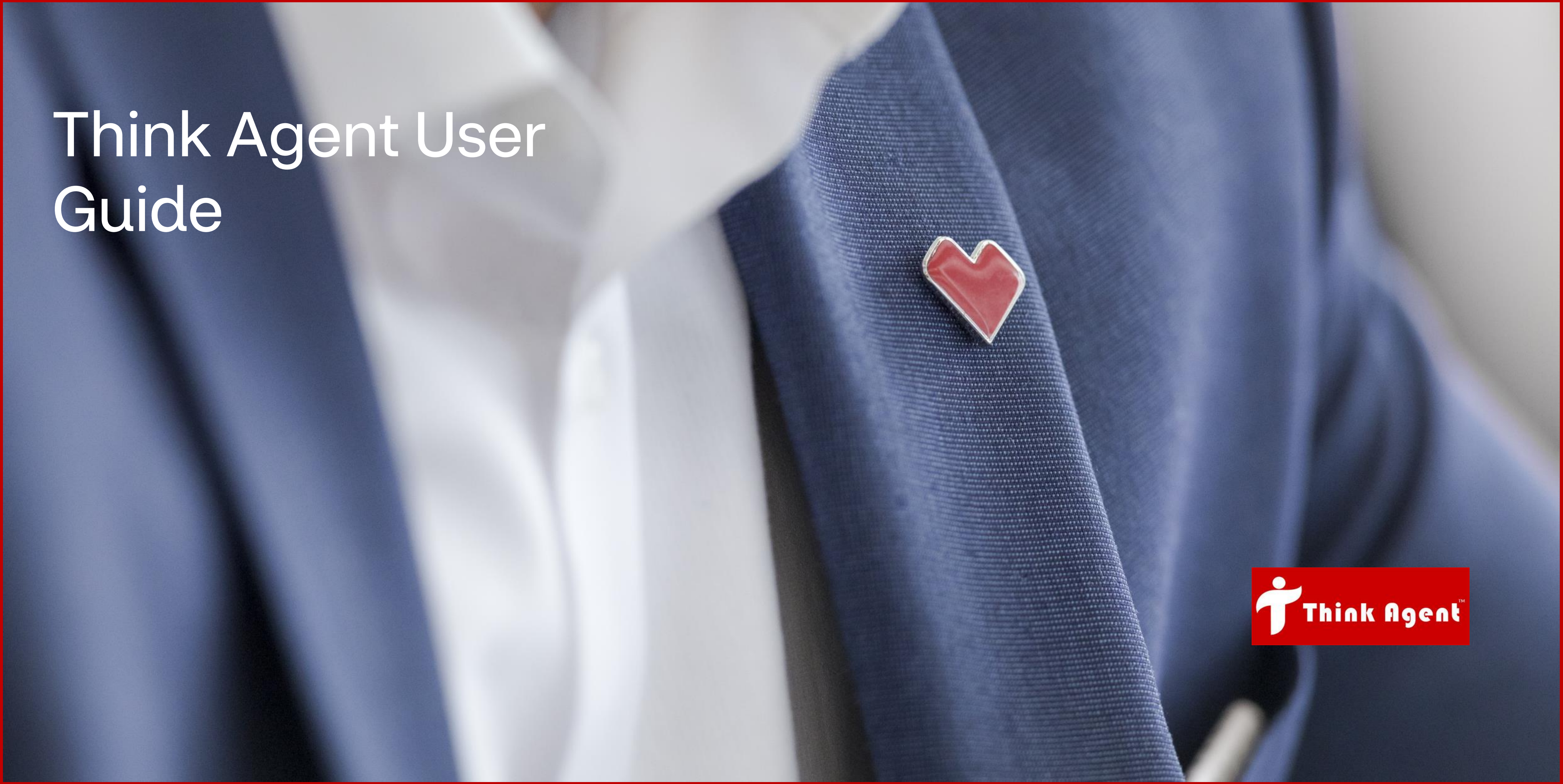
Think Agent User Guide



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Getting started with Think Agent

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:

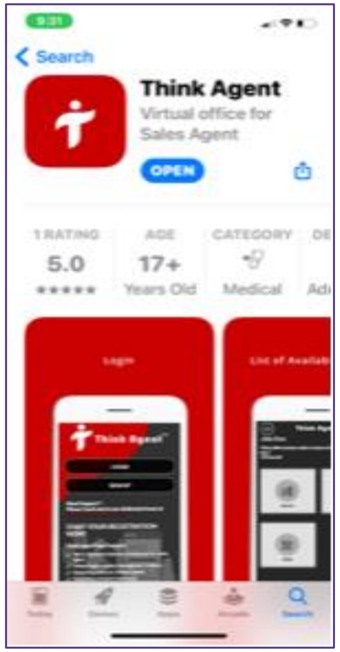
- Activity Calendar
- Notification
- Member Enrollment
- HRA
- Virtual E-kits
- Lead Management
- Event Requests and Updates
- Automated Event Check-in
- Resource Center – for download of supplementary Sales and Marketing related documents.
- Communicate with Prospect
- + More

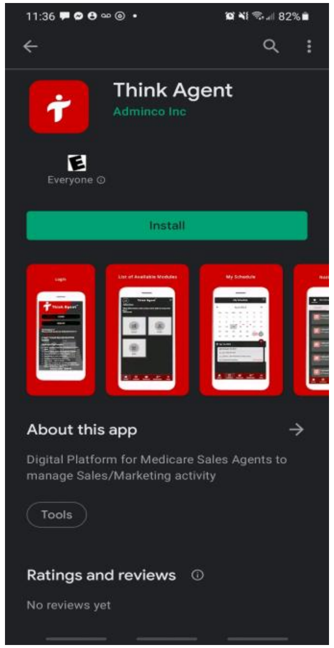
This Platform is for the Medicare Sales Agent - Designed with a vision to provide one-stop shop solution. This platform is backed by a dedicated support team that assists Agents to receive timely responses through a monitored email. **support@thinkagent.com**

Installing Think Agent

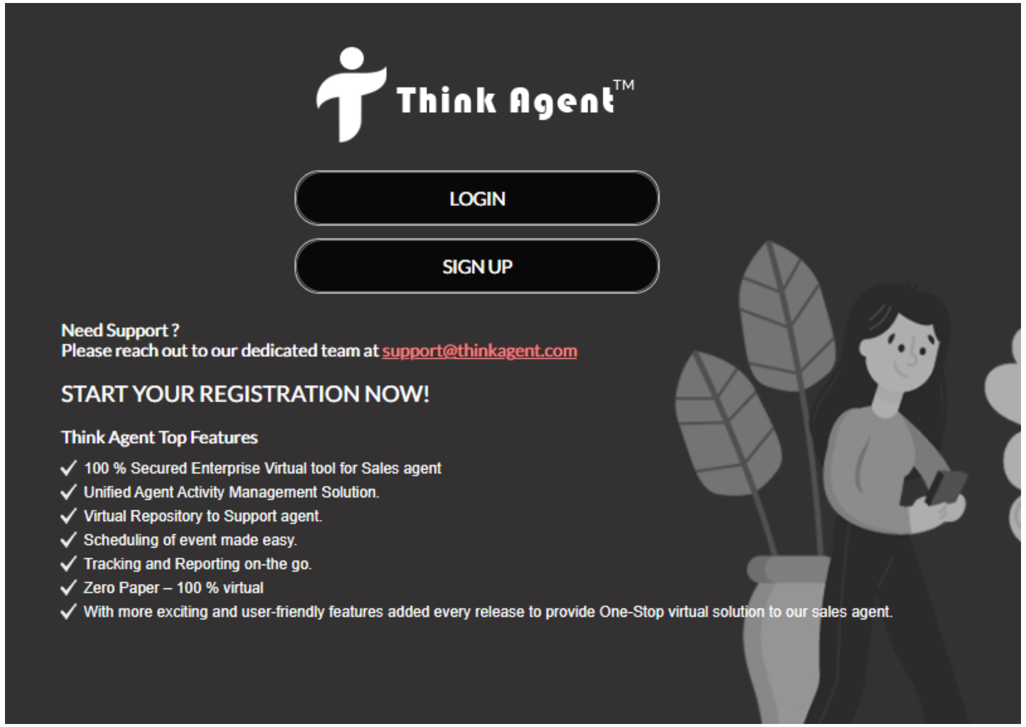
For mobile device, Think Agent is available for download in your device app store!

- 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



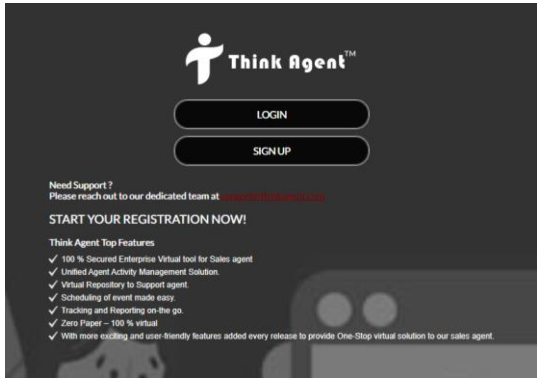
How do I request Think Agent access?

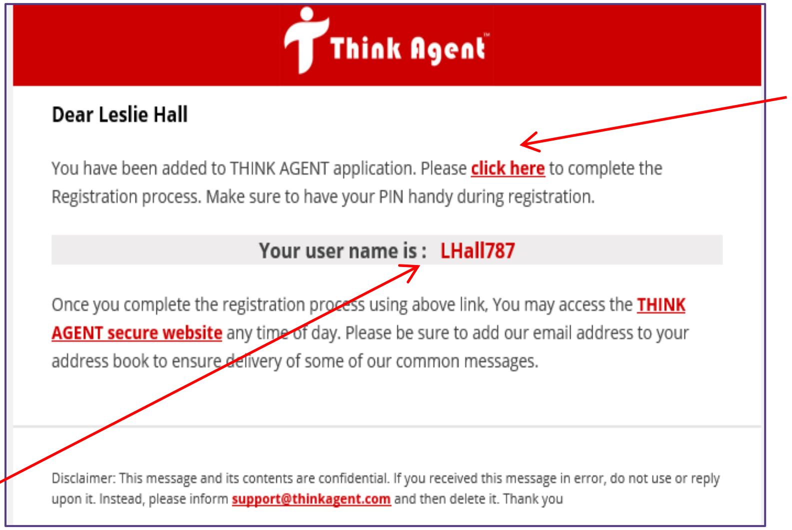
You can download the app from your device App Store, select **Sign Up** or simply send an email to support@thinkagent.com.

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.





Think Agent

Dear Leslie Hall

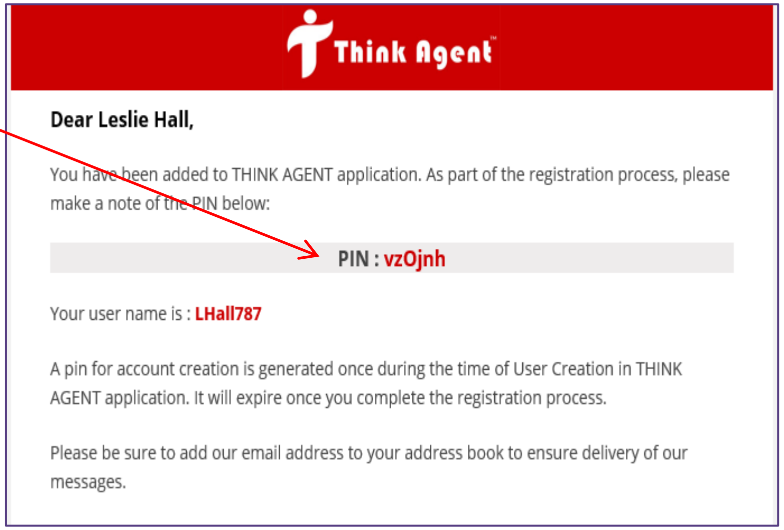
You have been added to THINK AGENT application. Please **click here** to complete the Registration process. Make sure to have your PIN handy during registration.

Your user name is : LHall787

Once you complete the registration process using above link, You may access the **THINK AGENT secure website** any time of day. Please be sure to add our email address to your address book to ensure delivery of some of our common messages.

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

Please click on "Click Here" to begin the registration process.



Think Agent

Dear Leslie Hall,

You have been added to THINK AGENT application. As part of the registration process, please make a note of the PIN below:

PIN : vzOjnh

Your user name is : **LHall787**

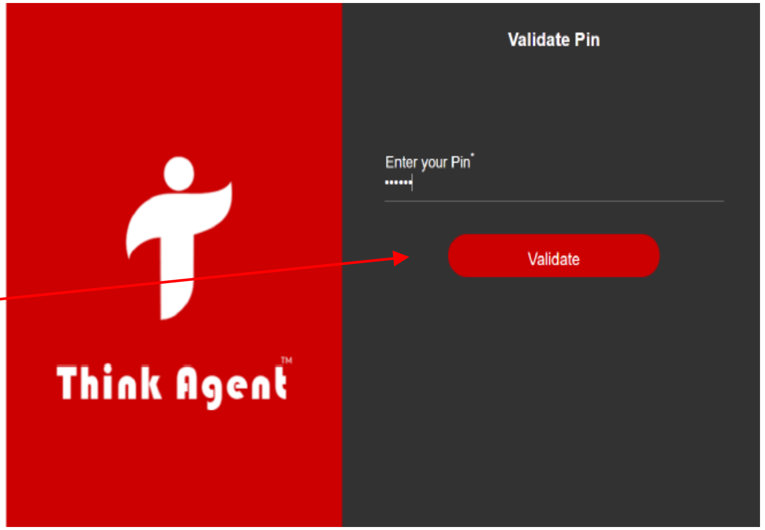
A pin for account creation is generated once during the time of User Creation in THINK AGENT application. It will expire once you complete the registration process.

Please be sure to add our email address to your address book to ensure delivery of our messages.

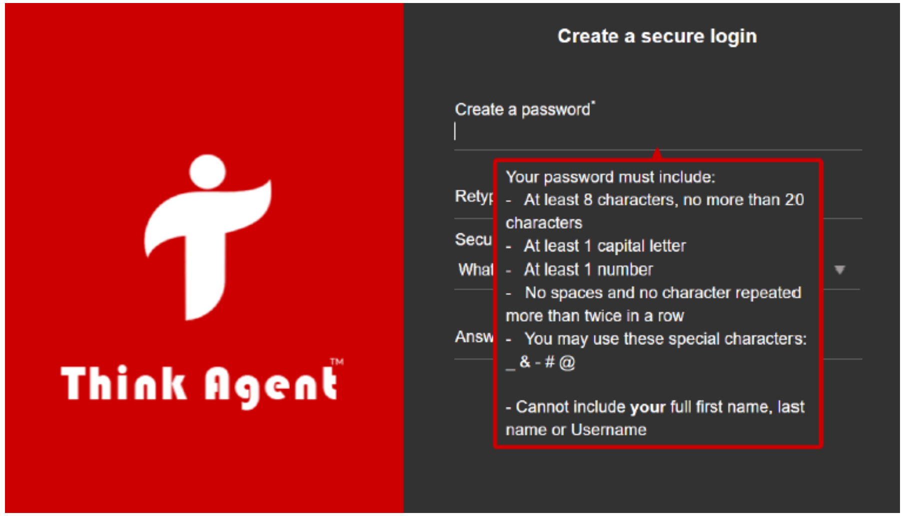
Your PIN is case sensitive. You will only use your PIN one time and just for registration.

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.

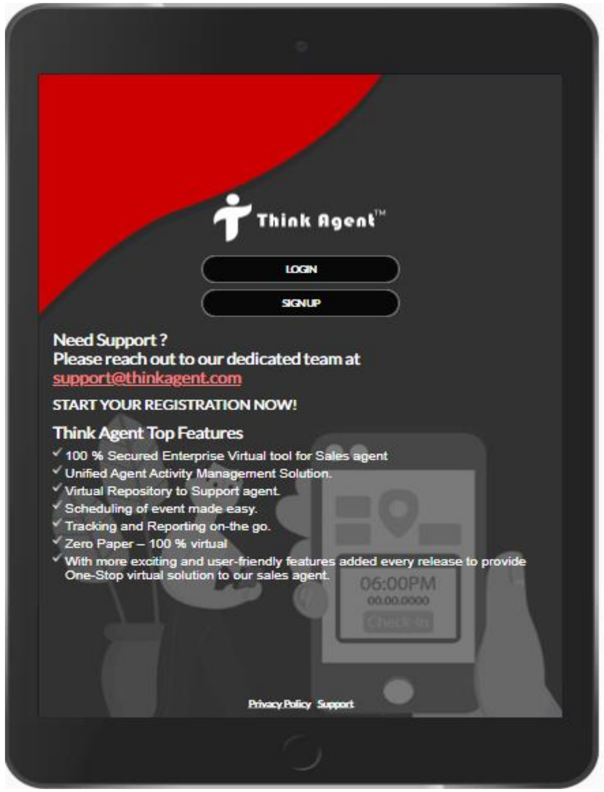
Feedback: Help shape our data-driven future

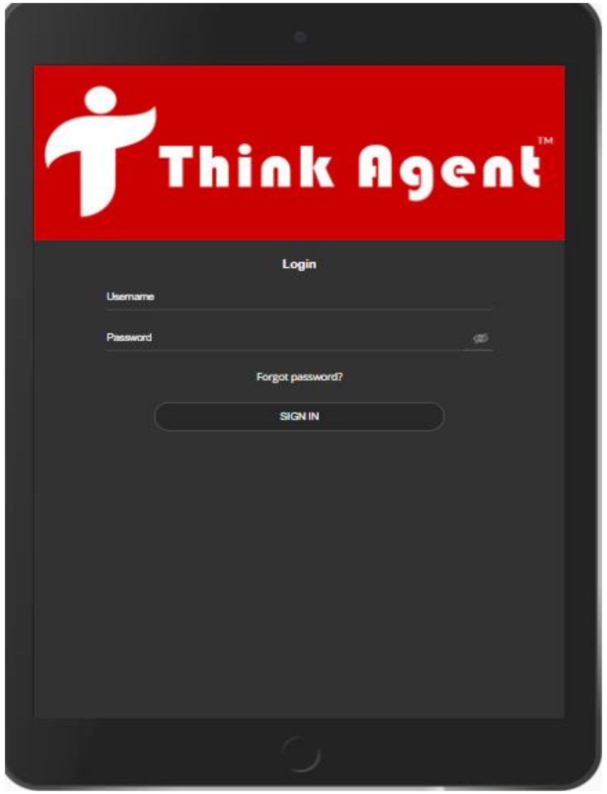
Please share feedback and enhancement ideas at support@thinkagent.com. We are building a mobile platform that will help agent to manage their sales activity anytime and anywhere. Your ideas will shape the evolution of THINK AGENT. This is just the beginning of a broader and deeper vision. THINK AGENT 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?

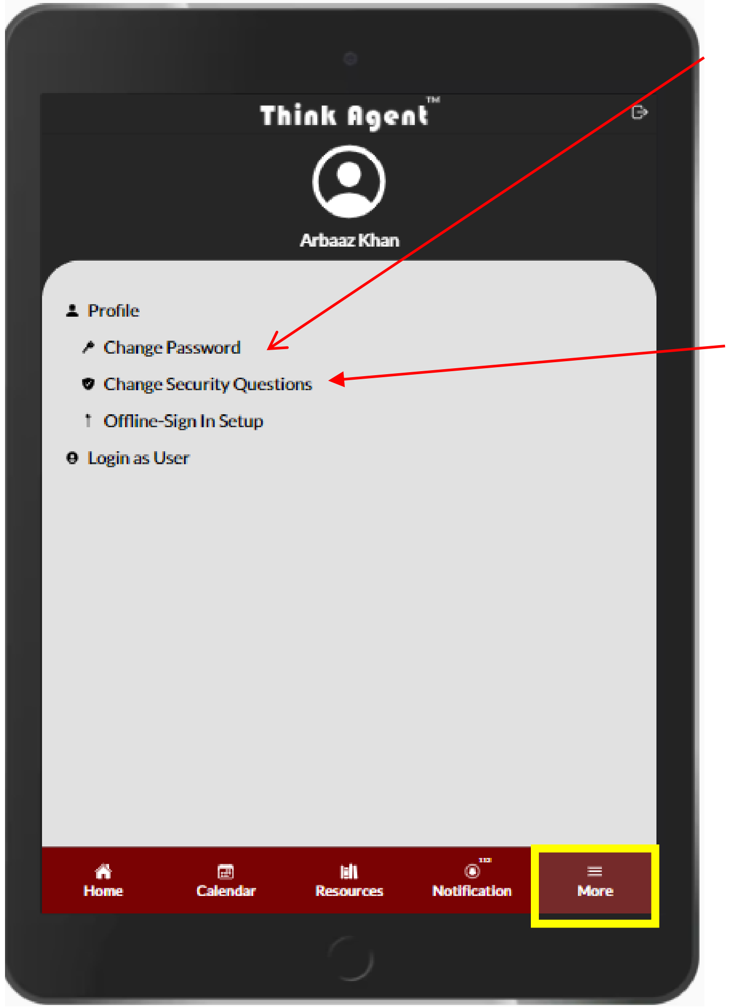
support@thinkagent.com

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!

Think Agent™

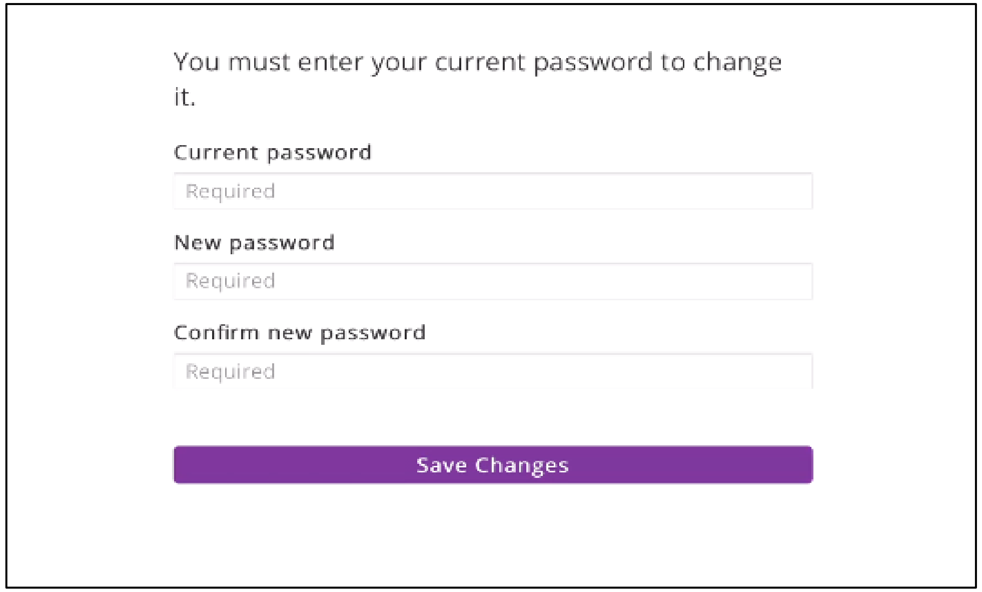
My Think Agent Settings

Changing Password and Security Questions

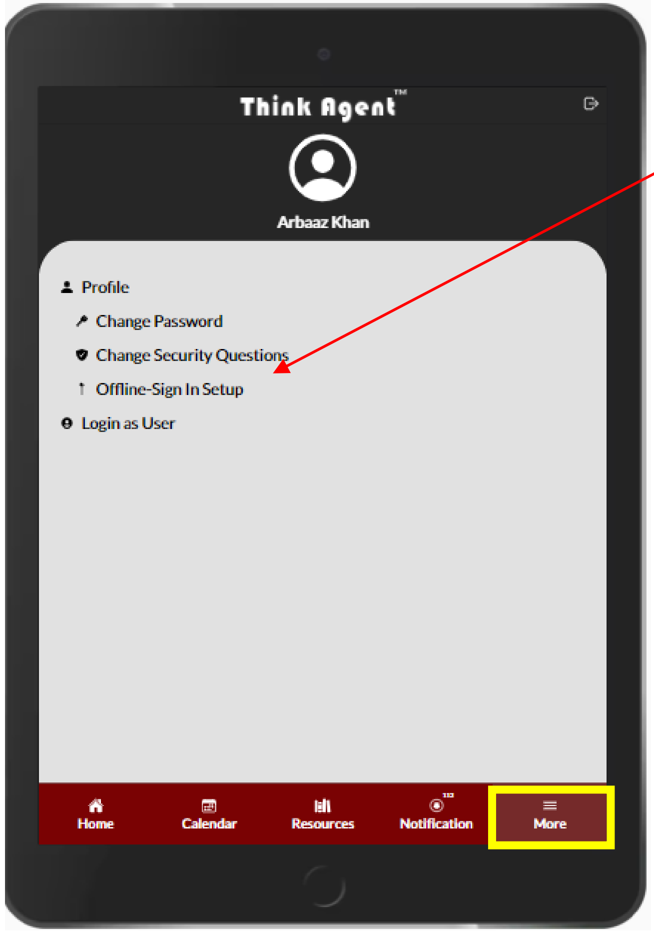


To change your Password, select **More** on the bottom of the screen. Next, click **Change Password** and follow the prompts below. **Save** your changes.

You can also change your Security Questions at any time!

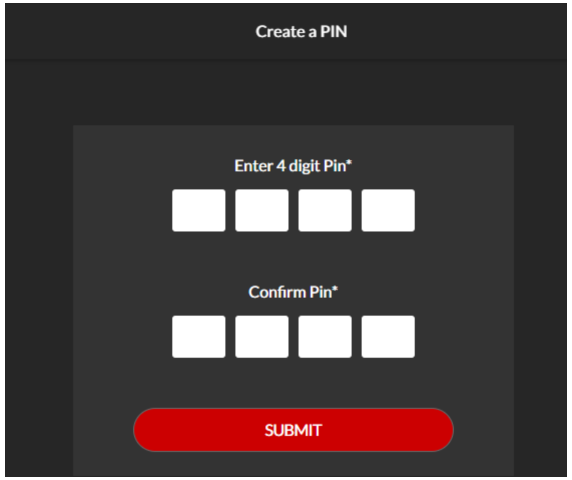


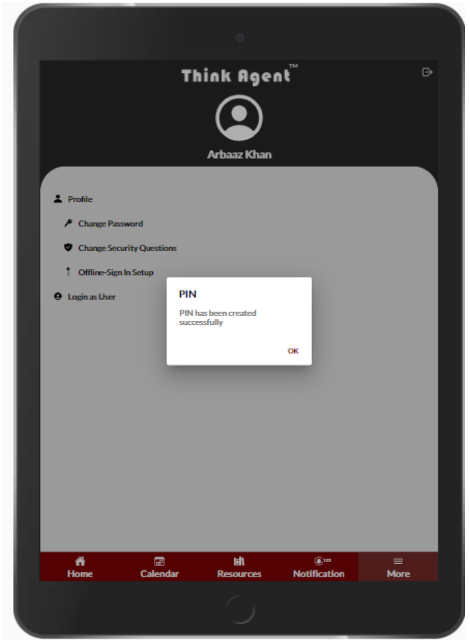
Working Offline: In places where there is limited or no internet connection



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

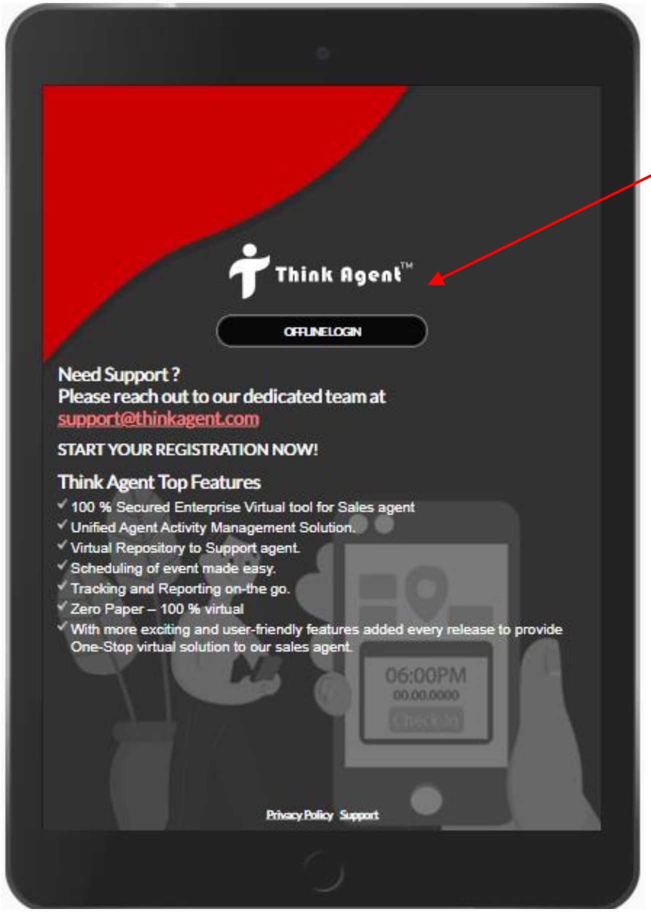
First, you will click the **More** tab at the bottom of the screen. Next you will select **Offline-Sign In Setup**. You will be prompted to create a **PIN** number and you will receive confirmation once there has been successful PIN generation.
You are now set up of Offline capabilities.





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.



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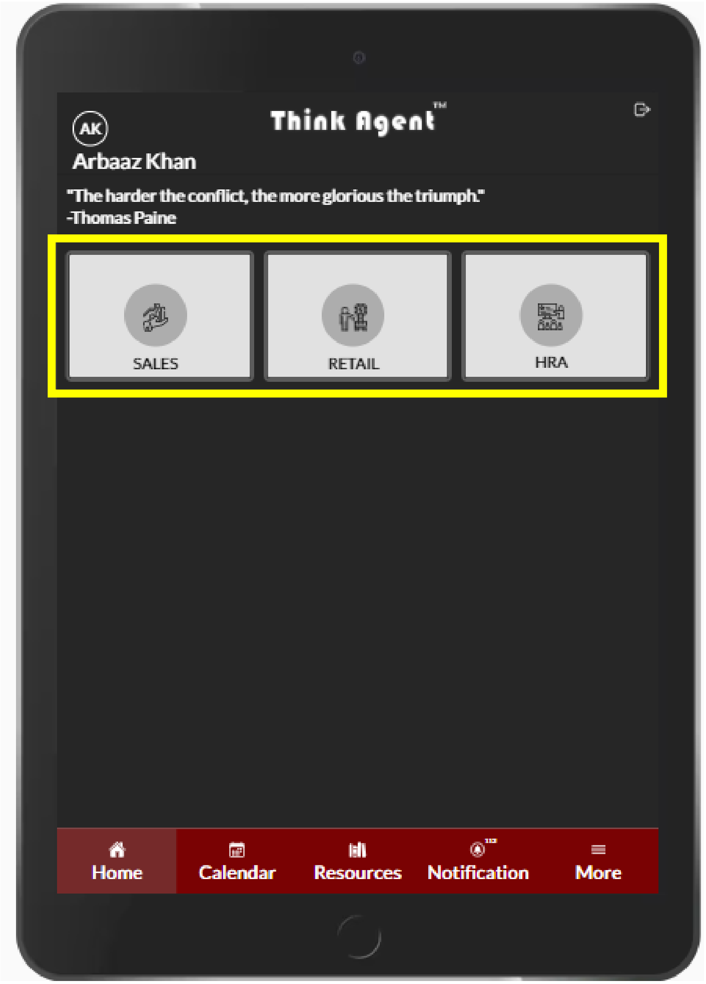
Think Agent Components

Think Agent™

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.

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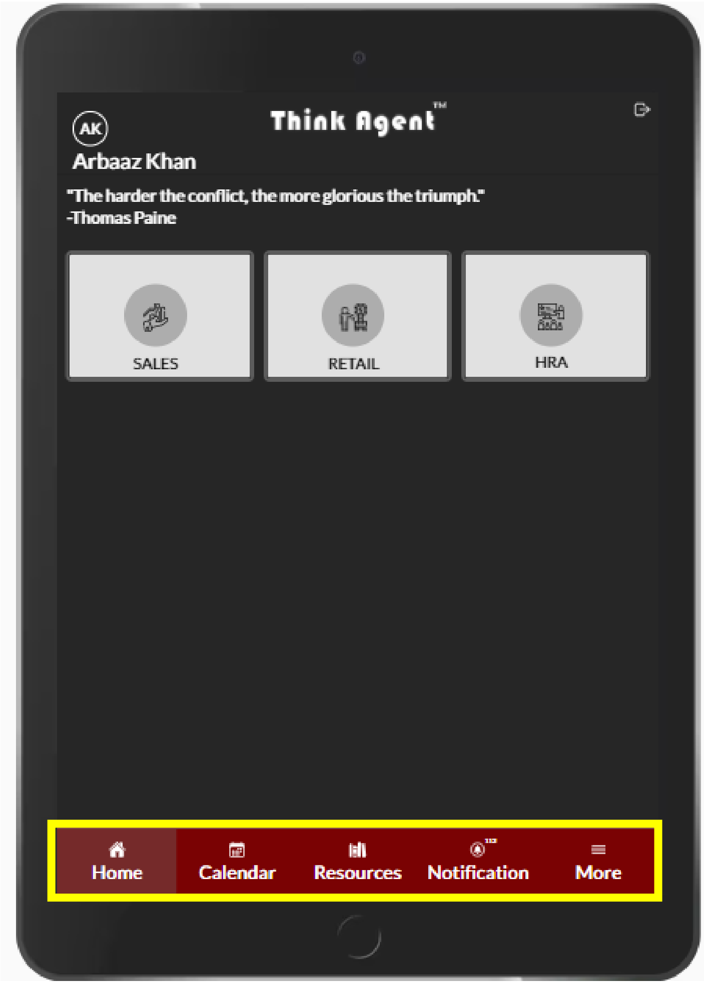
Think Agent Navigation



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

Think Agent™

What is the Enrollment opportunity?

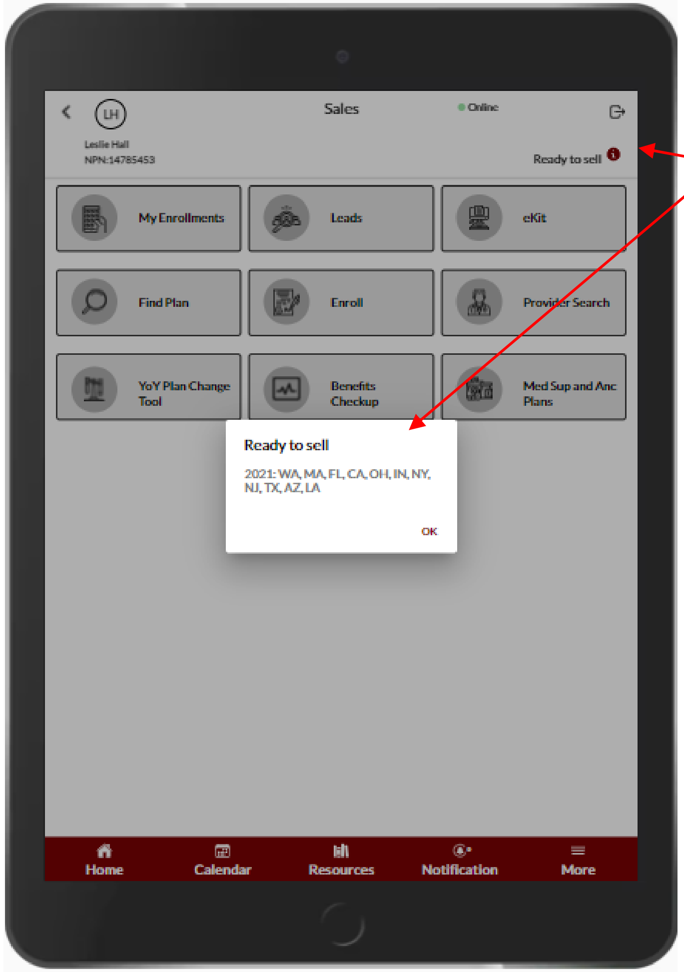
Think Agent provides you with the ability to quote and enroll beneficiaries in this easy-to-use tool. You can add drugs, pharmacies and conduct LIS and Medicaid eligibility checks.

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

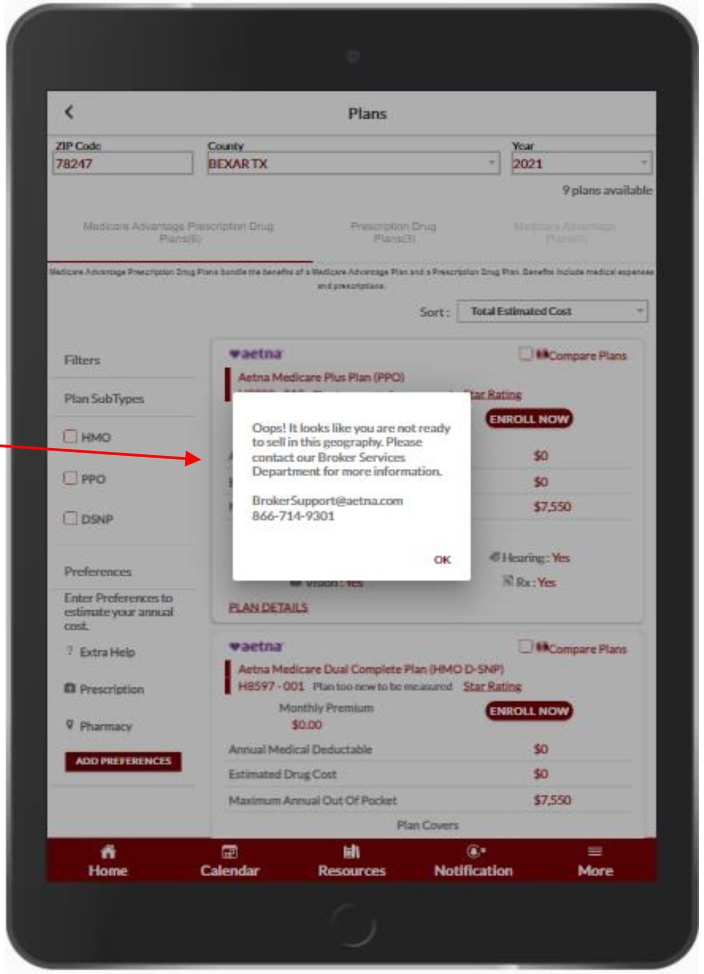


Think Agent has built in Ready to Sell validation. To see your Ready to Sell states, click on **Ready to sell**. Your Ready to sell states will populate.

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

Think Agent™

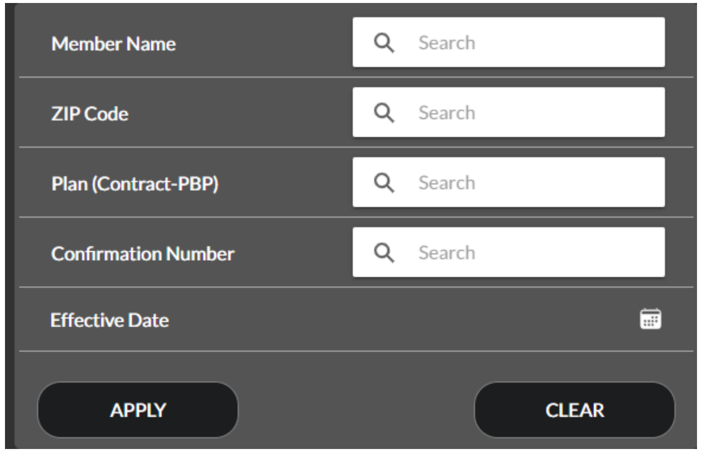
My Enrollments

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



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* : Ha..
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

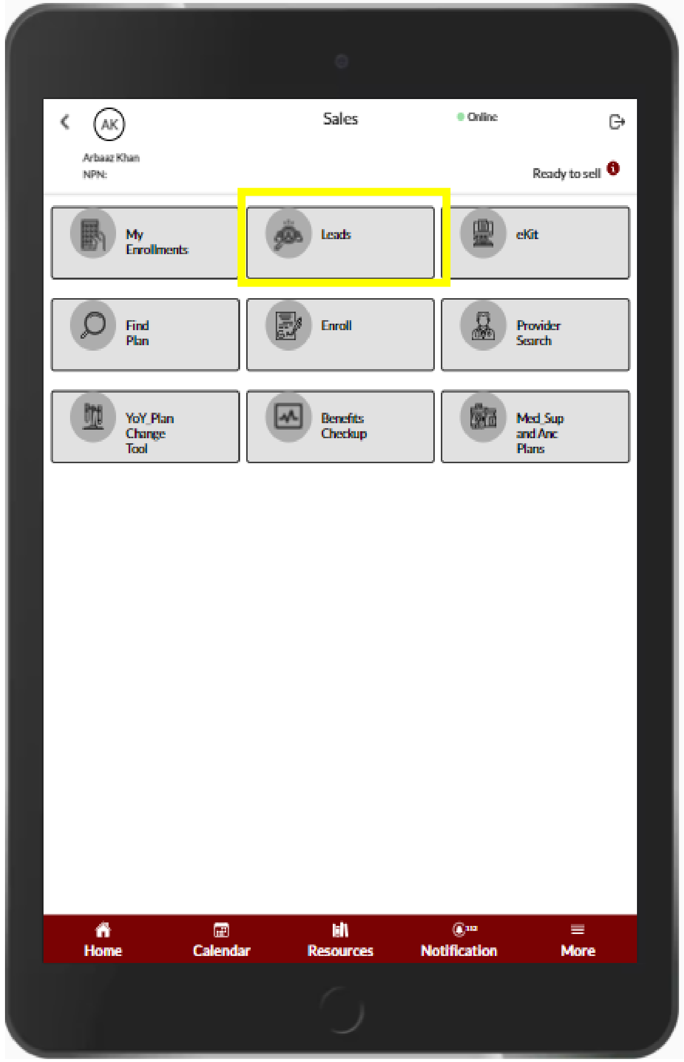
The **Actions** section will allow you to download a fully completed enrollment application for your records or allow you to pull up high level enrollment details on your beneficiary. (*PII has been removed for this demonstration.*)

Enrollment Detail

Confirmation No.	T12119562A	Member Name	Leslie
DOB	03/12/	State	TX
County	Bex	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!

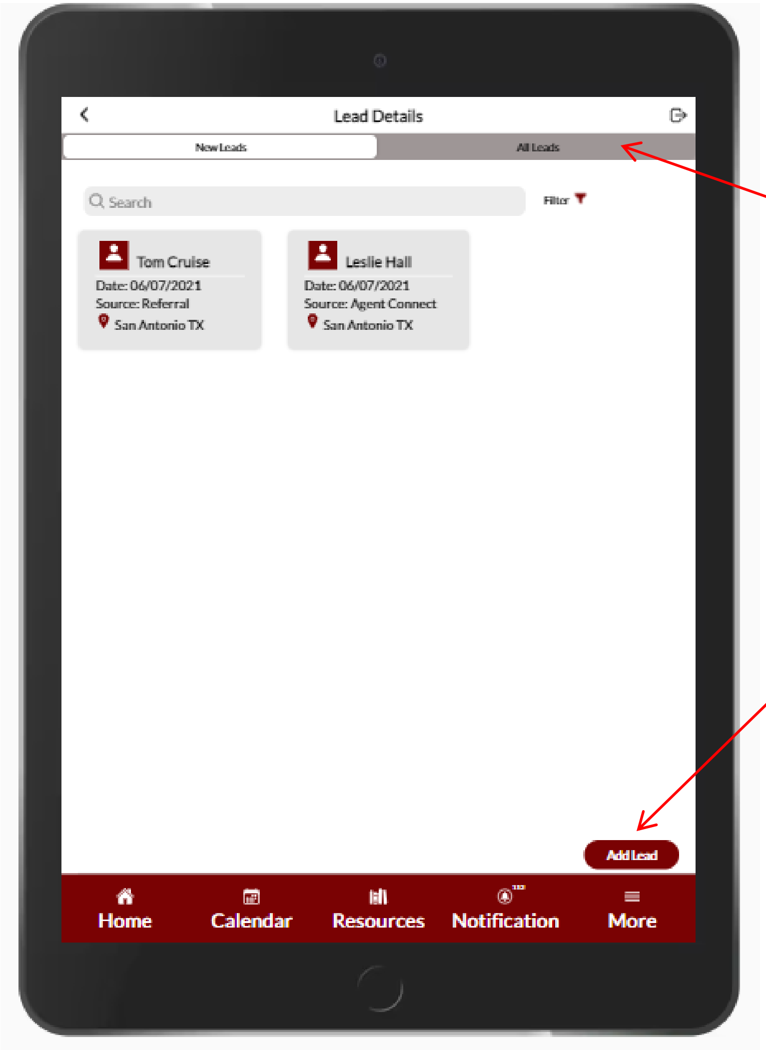
Lead components are:

- **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.

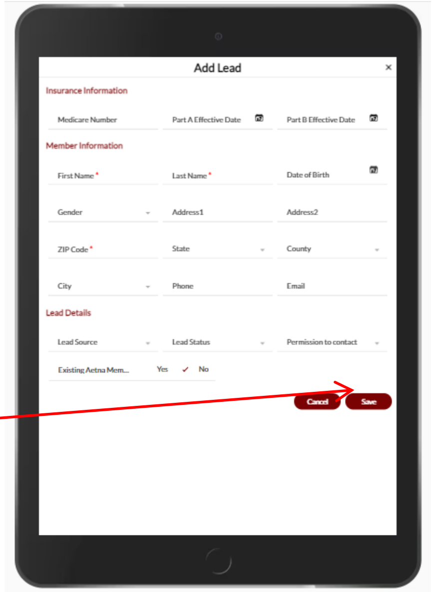
Think Agent allows you to search on any lead name.

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

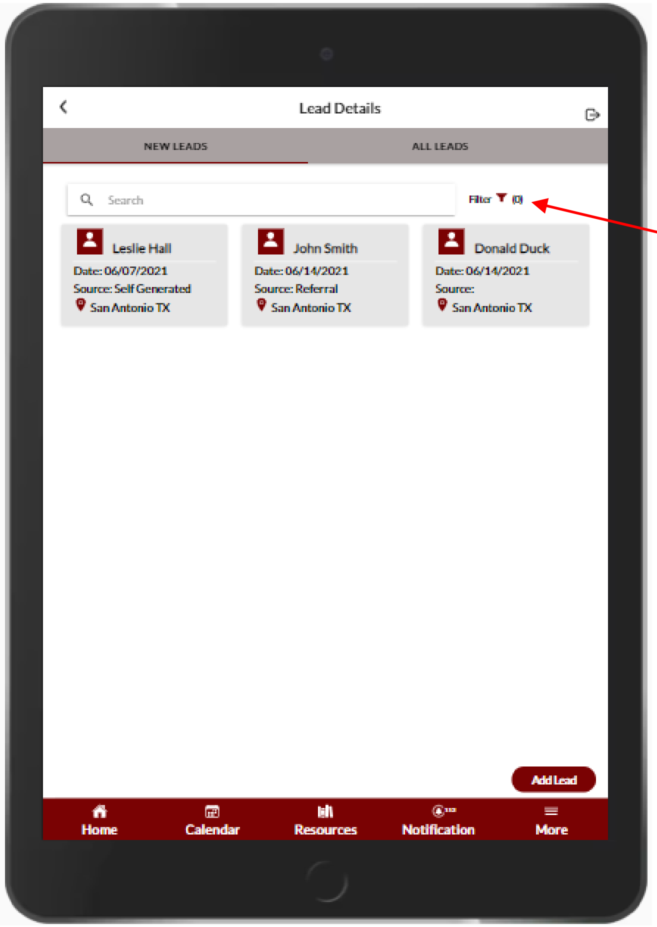
To add a lead, click **Add Lead**. A lead template will open.

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

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



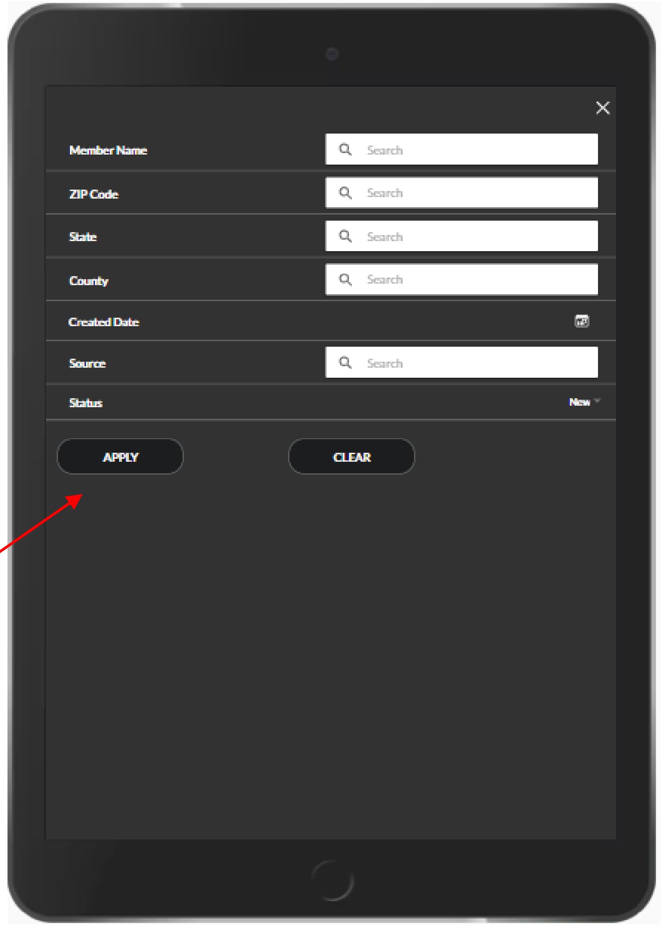
Leads Filter



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.



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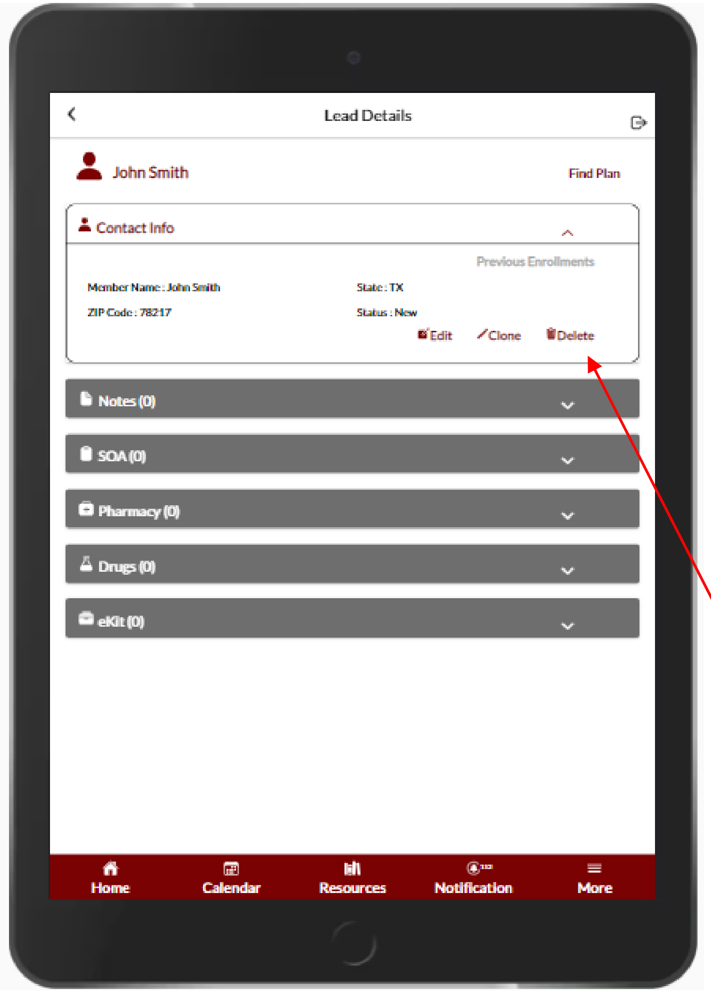
Lead Contact Information



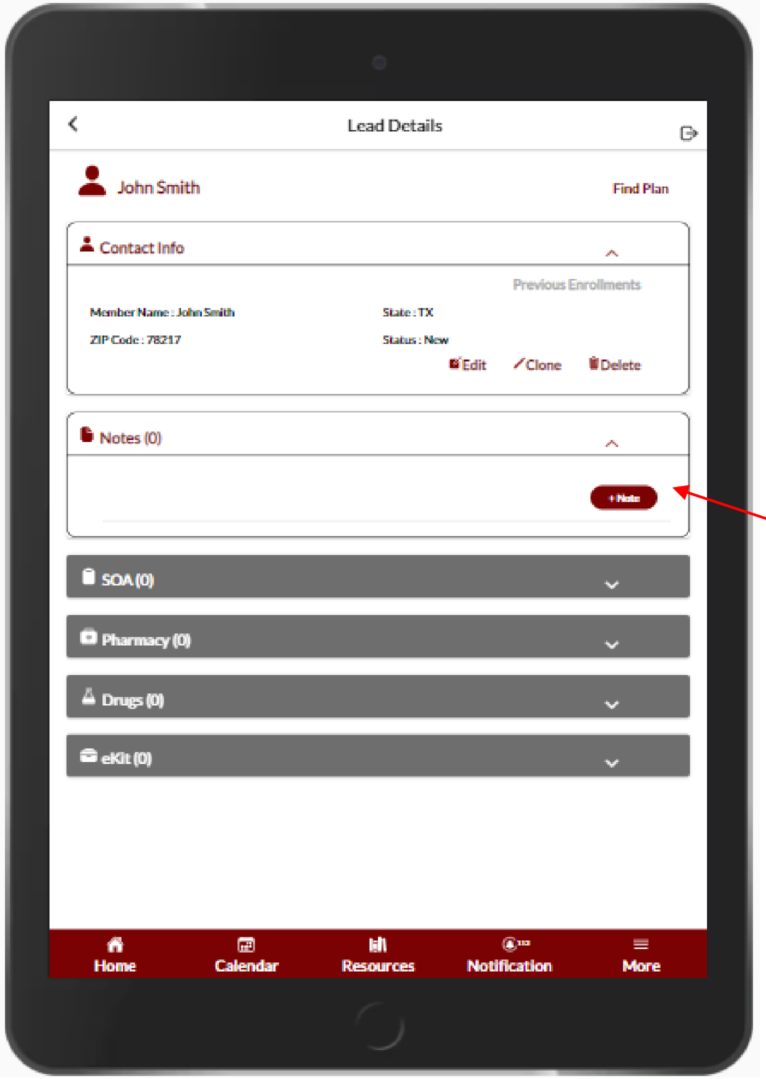
The Lead **Contact Information** will follow you through the quoting and enrollment process. Any fields you populate in the Contact Information section will auto-populate form templates like Scope of Appointment, eKit and enrollment forms.

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!

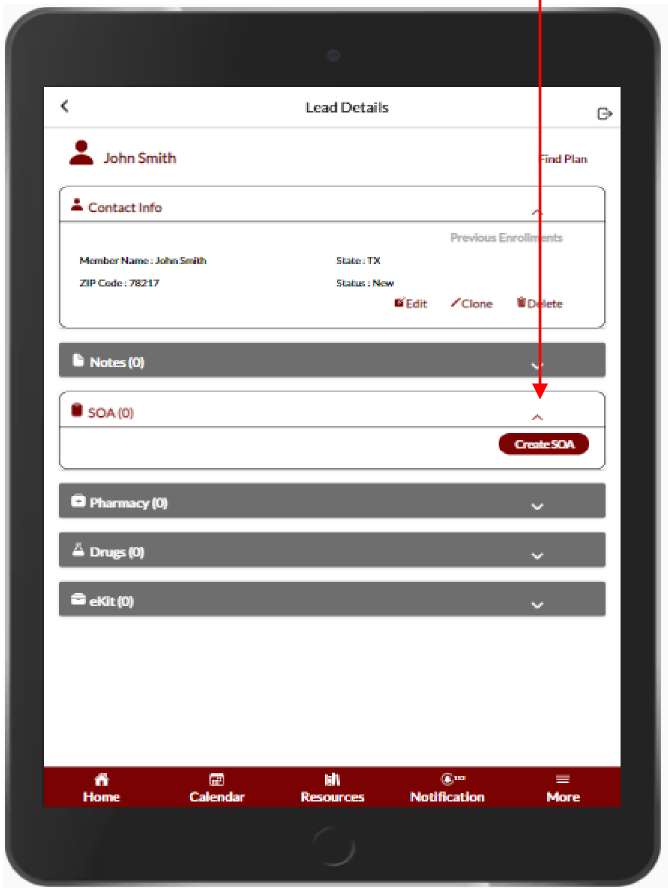
Notes are also date and time stamped for a historical reference.

You can edit or delete notes at any time.

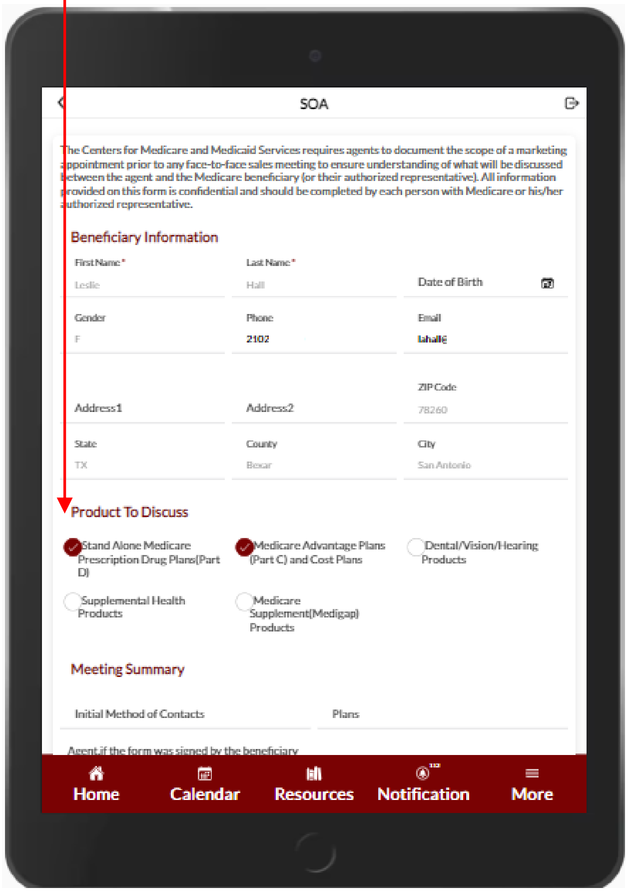
To add a note, select **+Note**.

Lead Scope of Appointment

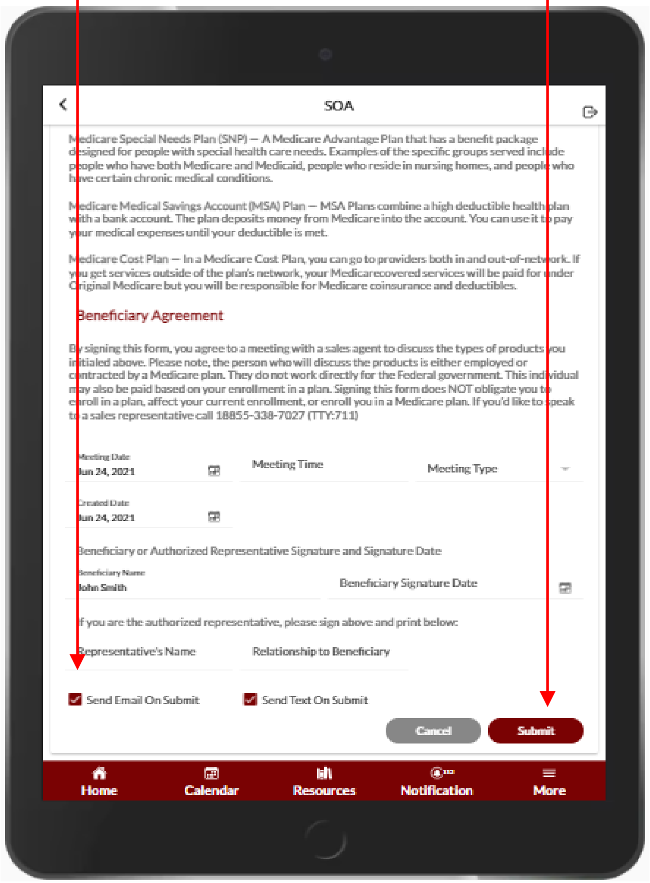
To create a Scope of Appointment (SOA), select **Create SOA**.



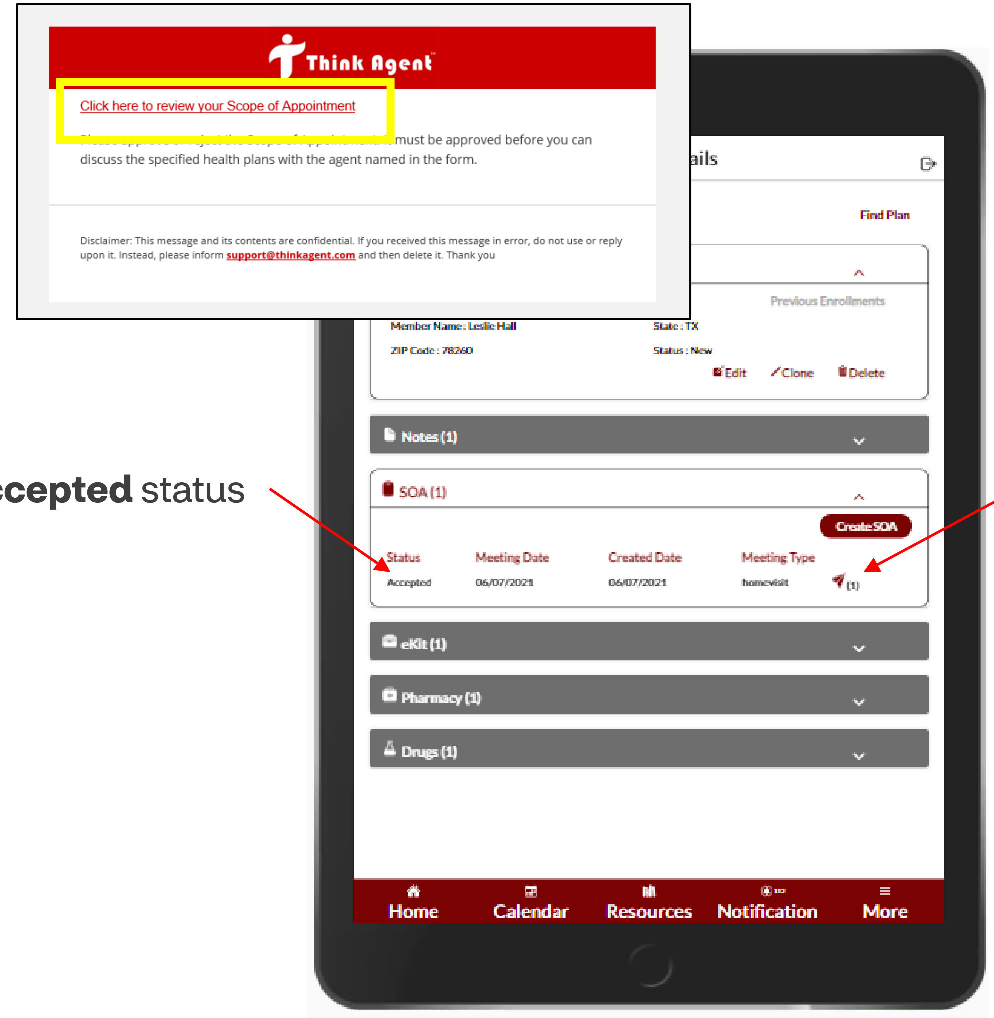
All previously entered Lead criteria will auto populate the SOA form. Select the **Products to Discuss** and navigate to **Meeting Summary**.



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



Lead Scope of Appointment



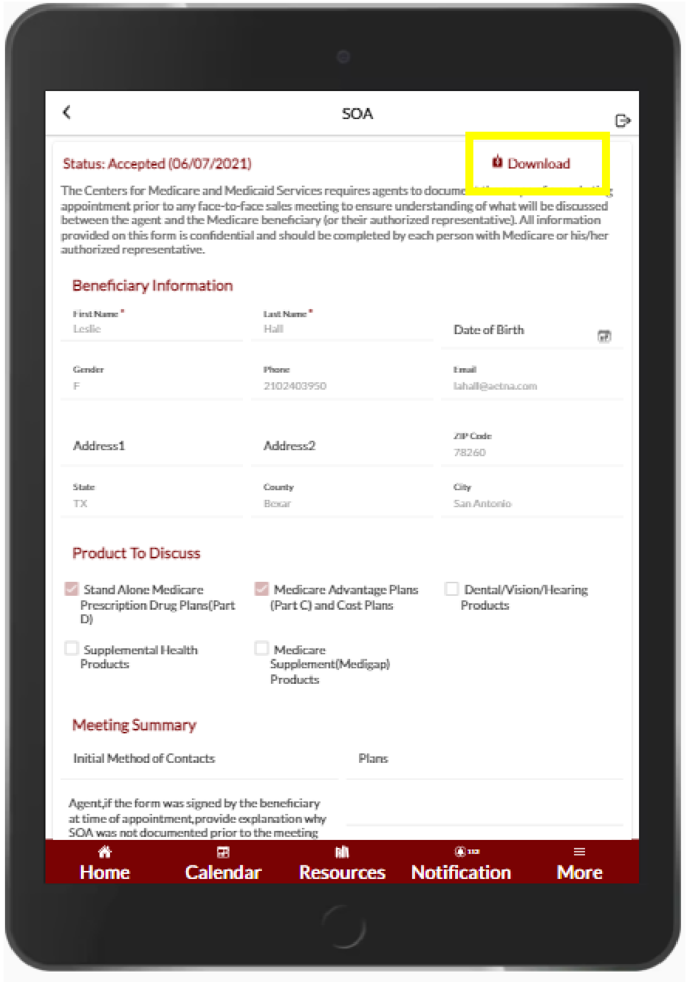
Accepted status

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

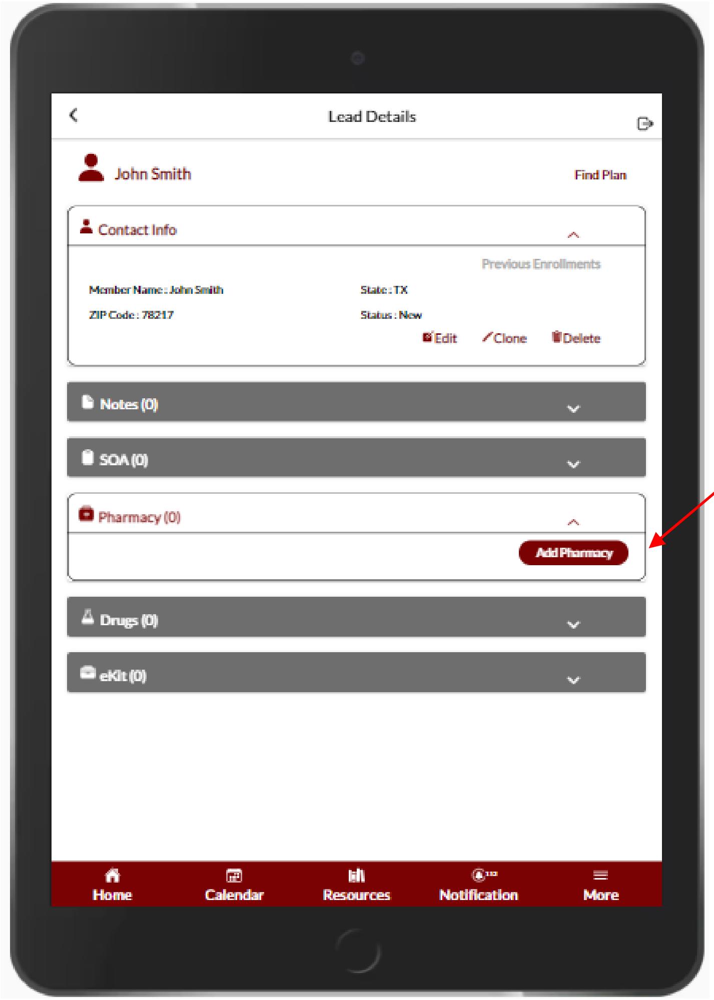
If you need to resend a SOA, click the **arrow** button.

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

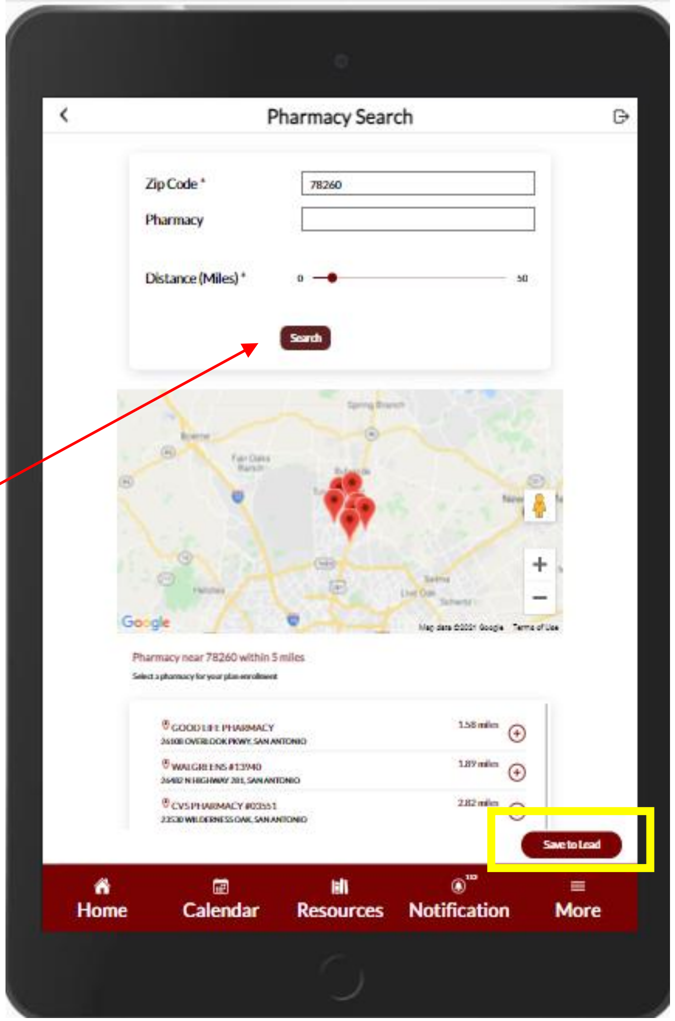


As you build your lead profile, you will want to add a Pharmacy to the beneficiary's information. The Pharmacy locator is simple in Think Agent!

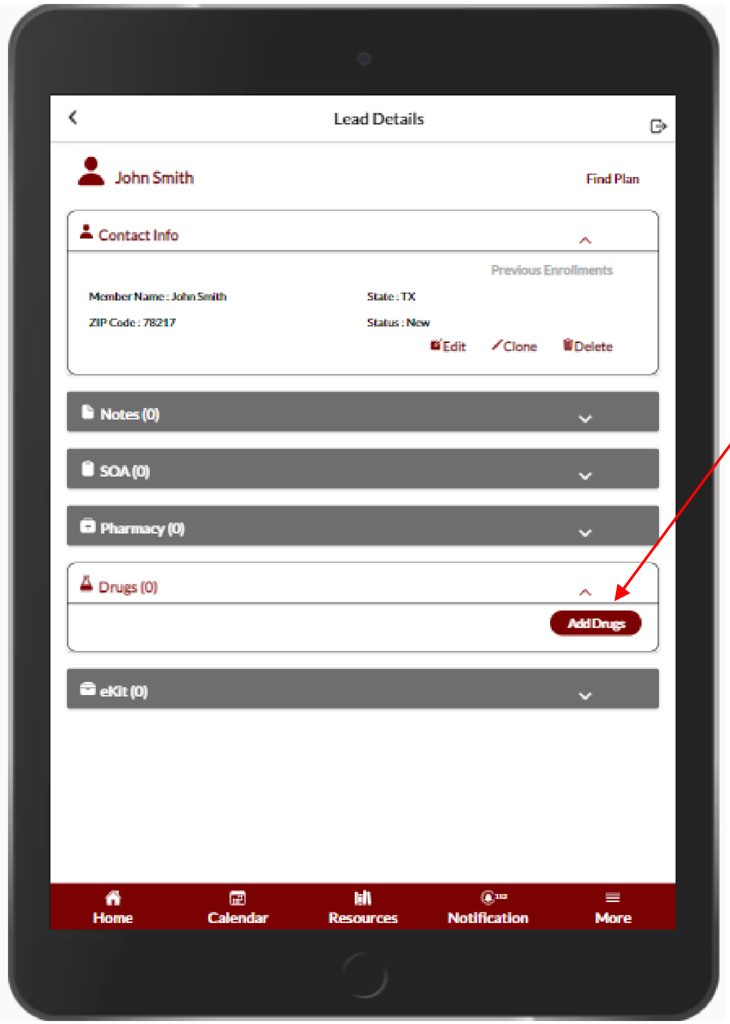
To add a Pharmacy, select **Add Pharmacy**. On the next screen, you can modify the scope of your search by adjusting the **Distance**. Think Agent defaults to a 5-mile radius.

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



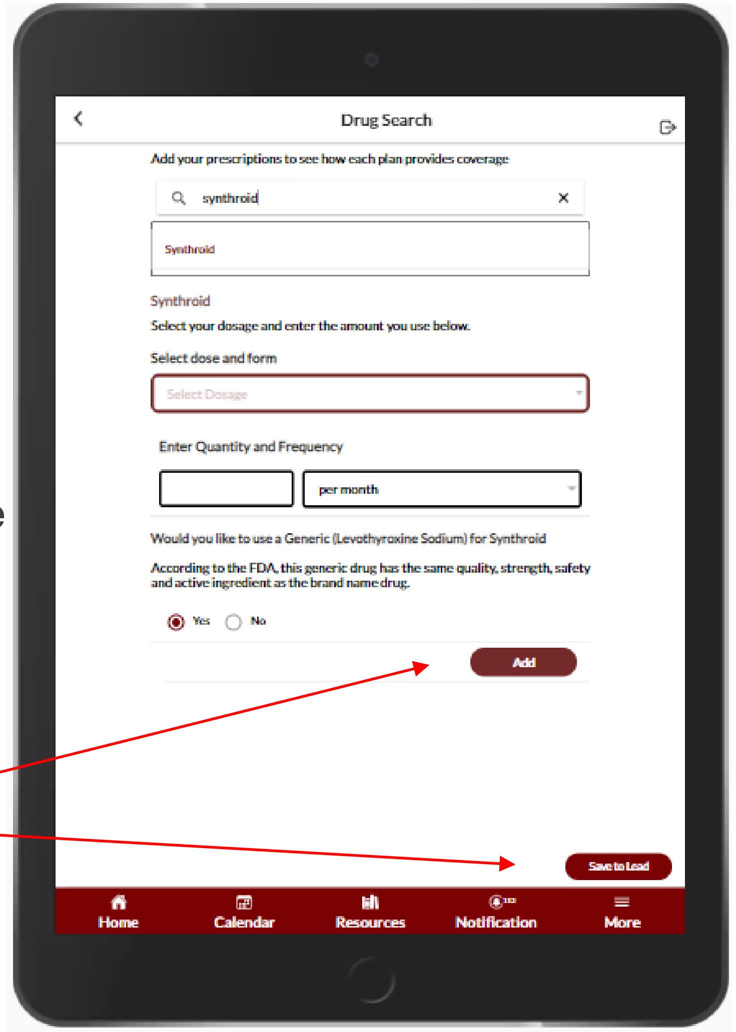
Adding drugs to the lead profile is an important step to building a lead. Adding drugs will impact the **Drug Cost Calculator** in your quoting and enrollment process.

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

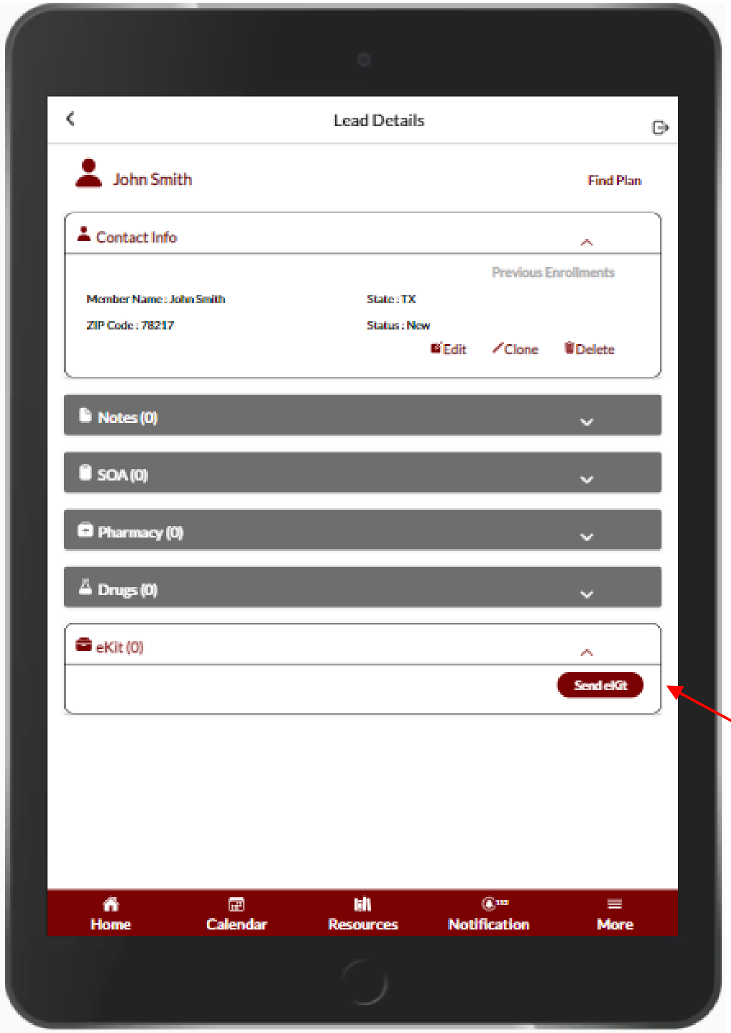
The next screen will ask for drug information. Use the dynamic search feature to find, select appropriate drug **Dose** and **Form** and enter **Quantity** and **Frequency**.

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**.



Lead eKit

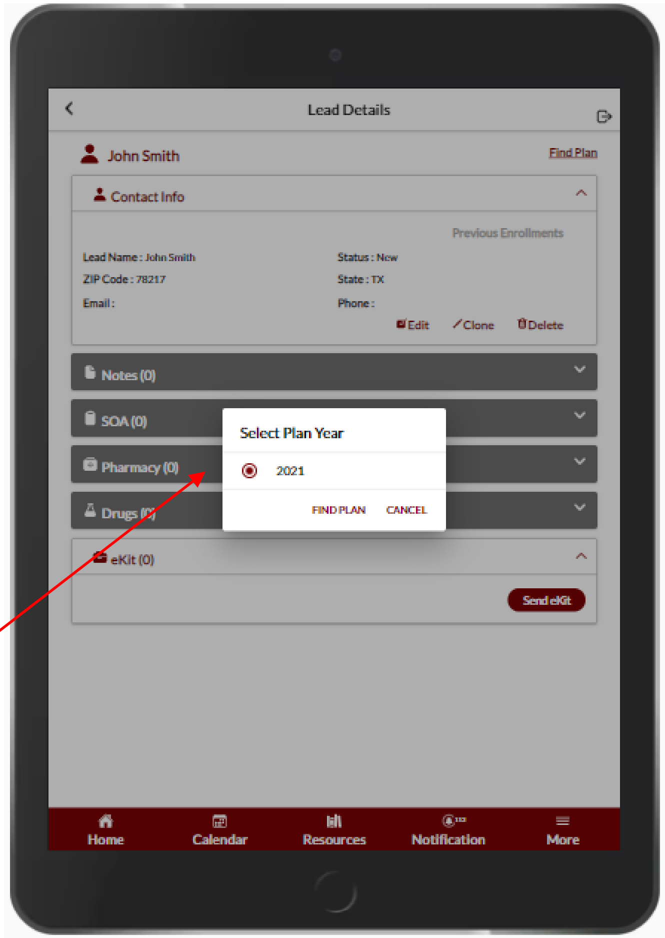


eKits are an easy and compliant way for your clients to enroll in MA/MAPD/PDP plans when you're not able to meet with them in person.

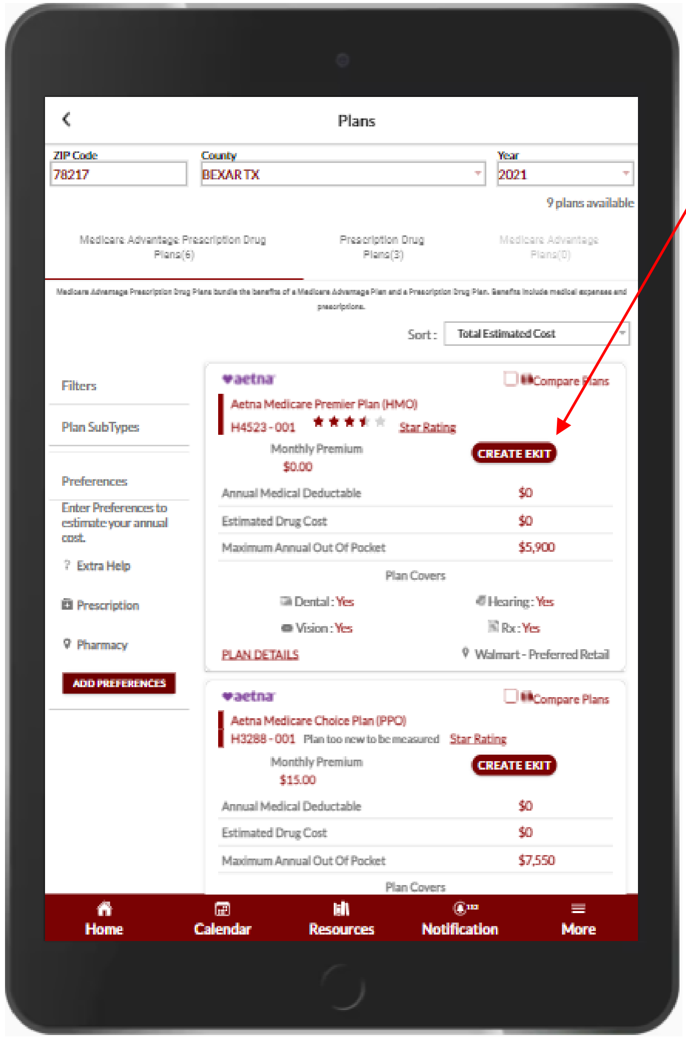
You'll simply send your clients an email with a link to enroll and you will be retained as the writing agent on the sale!

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

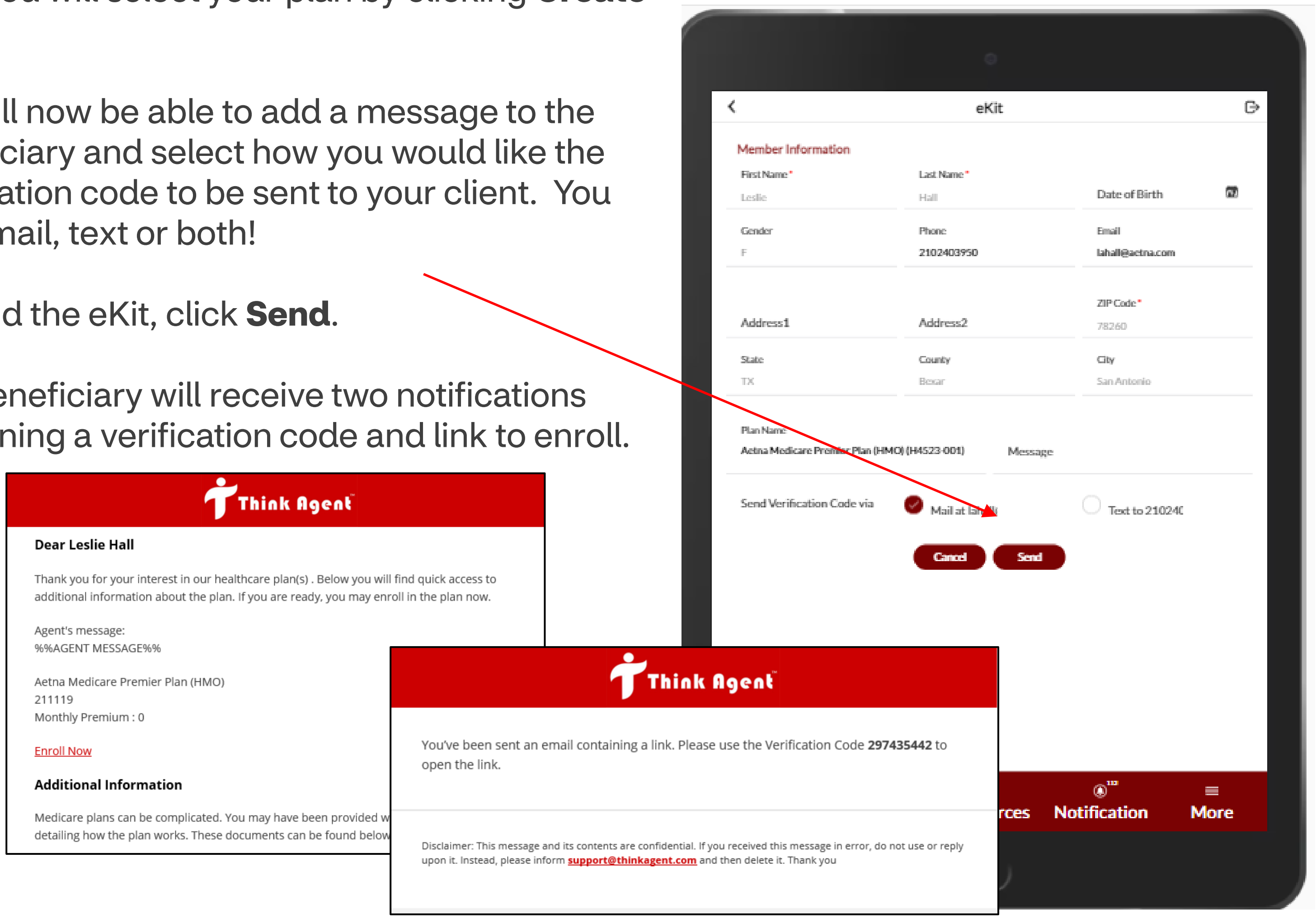


Next you will select your plan by clicking **Create eKit.**

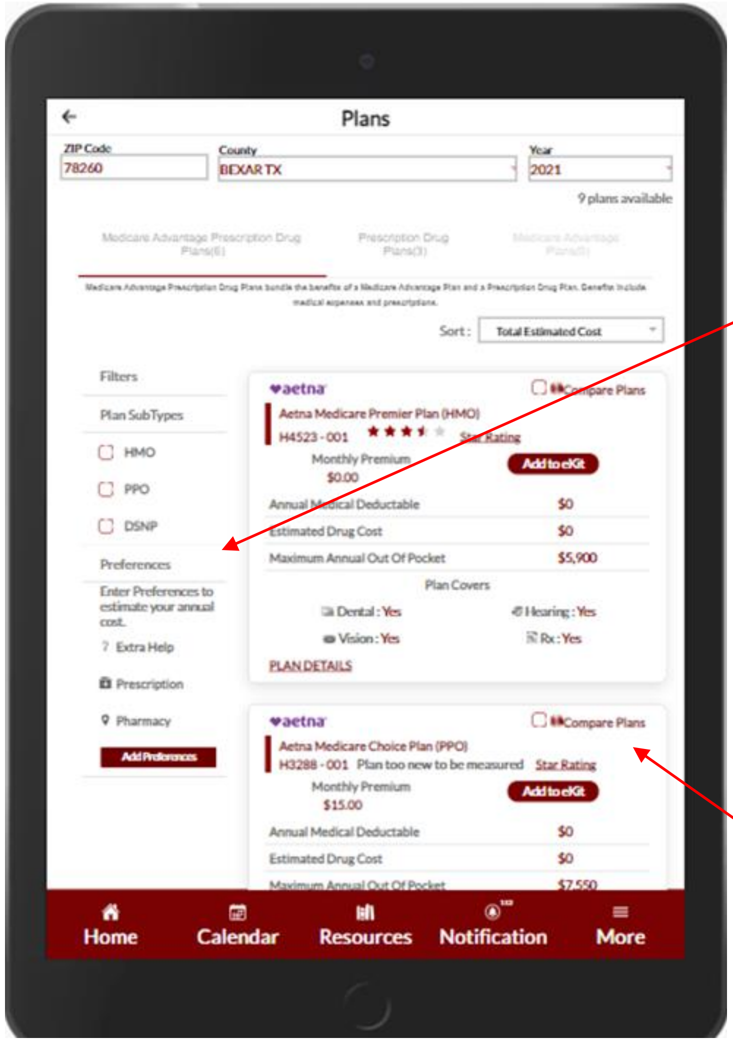
You will now be able to add a message to the beneficiary and select how you would like the verification code to be sent to your client. You can email, text or both!

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

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



Did you know?



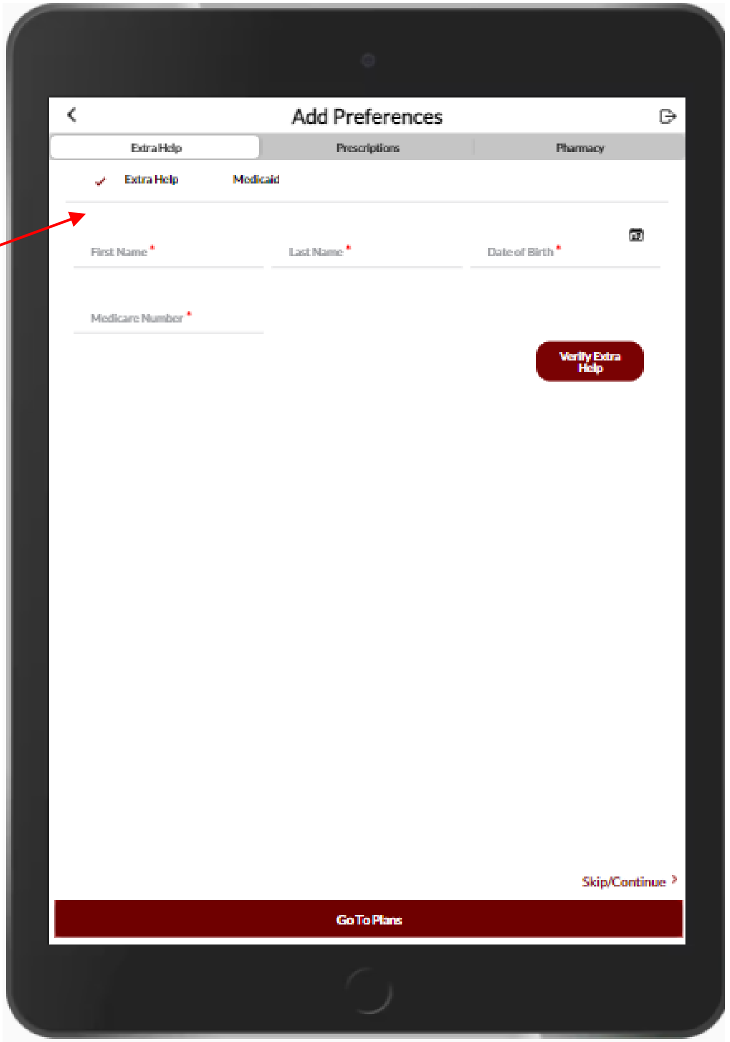
Before you send an eKit, you can filter for **Specific Plan Sub Types** and **Add Preferences**.

Preferences include:

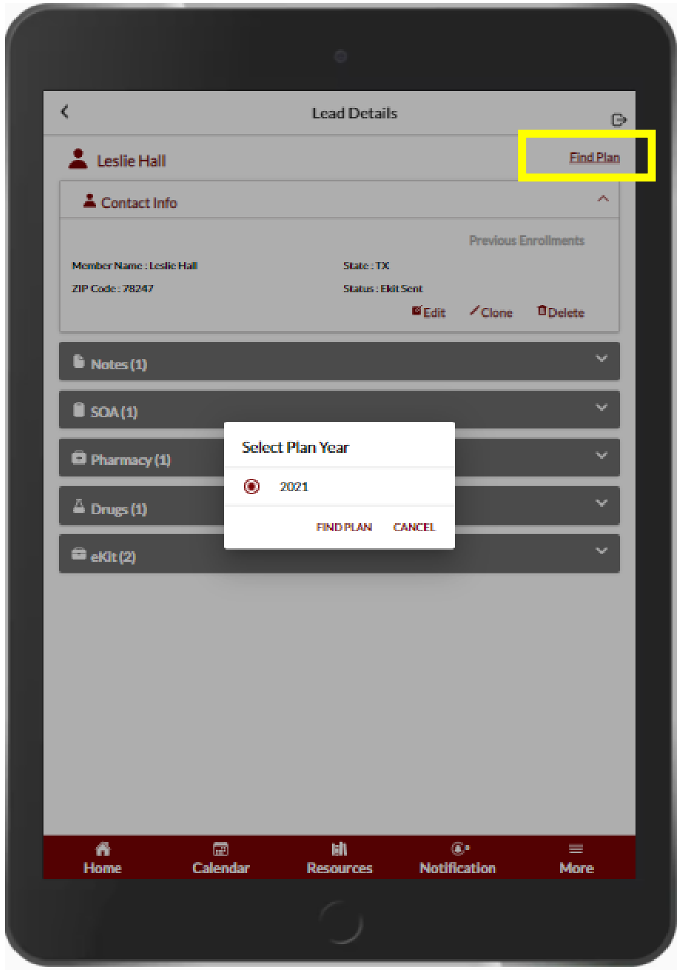
- **Extra help Verification**
- **Medicaid Eligibility Check**
- **Add Prescriptions** so that the Estimated Drug Cost will calculate and
- **Add a Pharmacy**

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

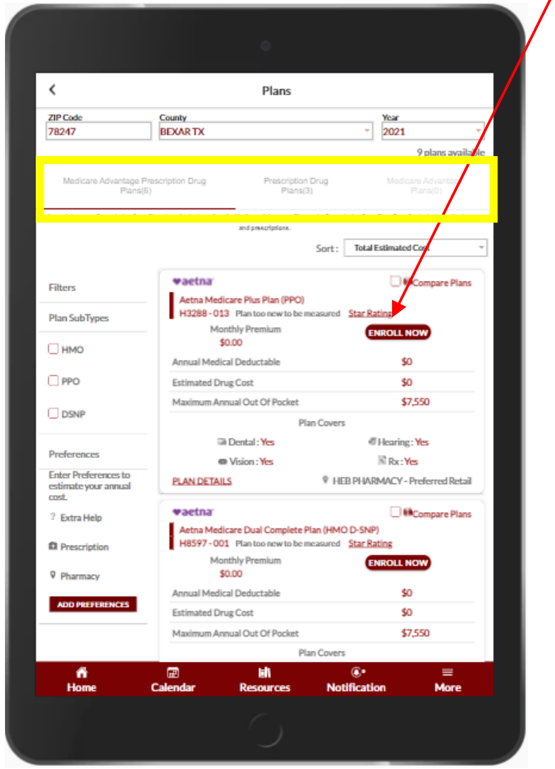
You can also compare up to three plans for a side-by-side comparison of benefits.

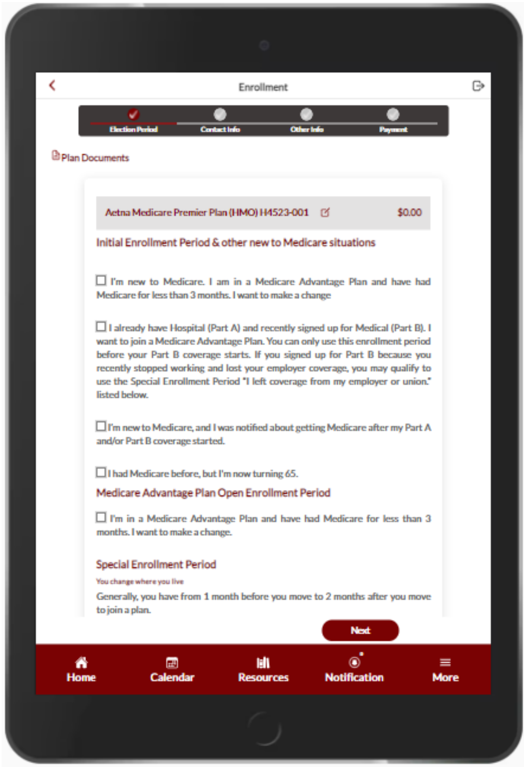


Lead Find A Plan/Enroll



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.

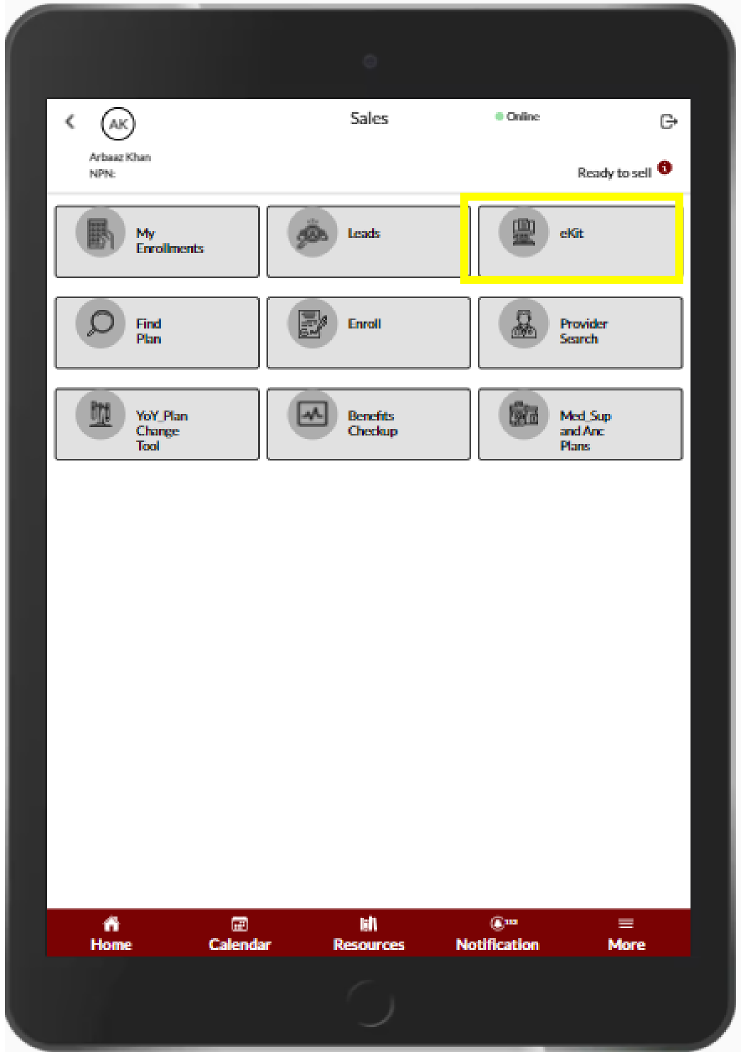




eKit

Think Agent™

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!

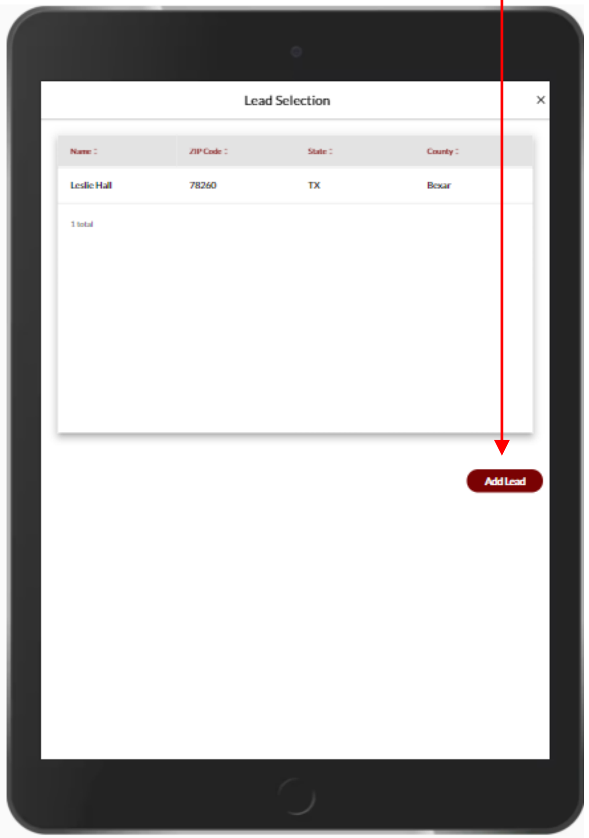
After you press send, your client will receive a unique verification code and an email containing all required plan documents for the selected plans as well as a link to enroll.

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

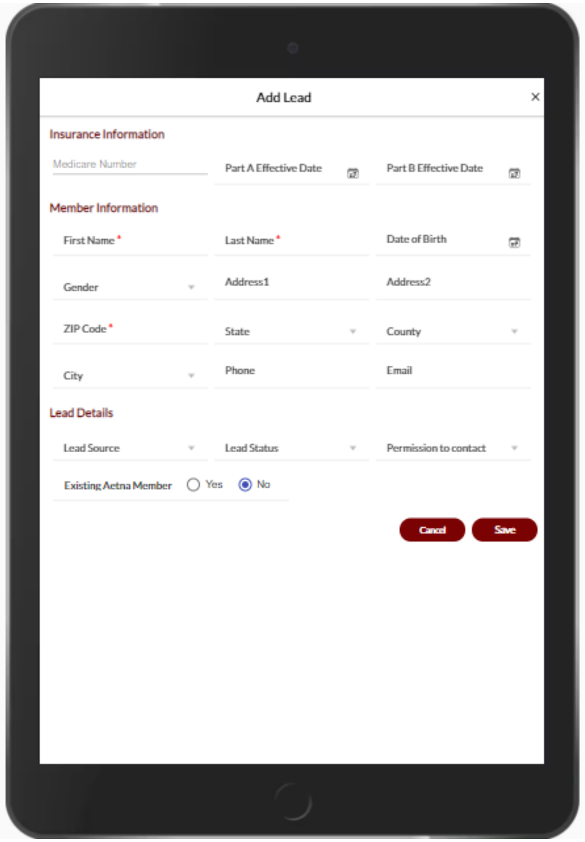
Next you will be prompted to select a lead or add your beneficiary's information as a new lead.

eKit

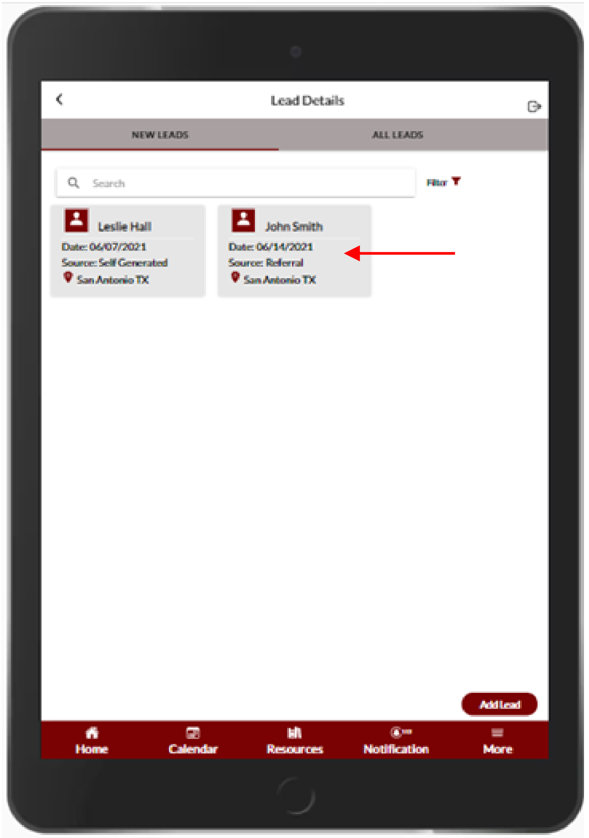
To select an existing lead, double click the Lead Name. To add a new lead, select **Add Lead**.



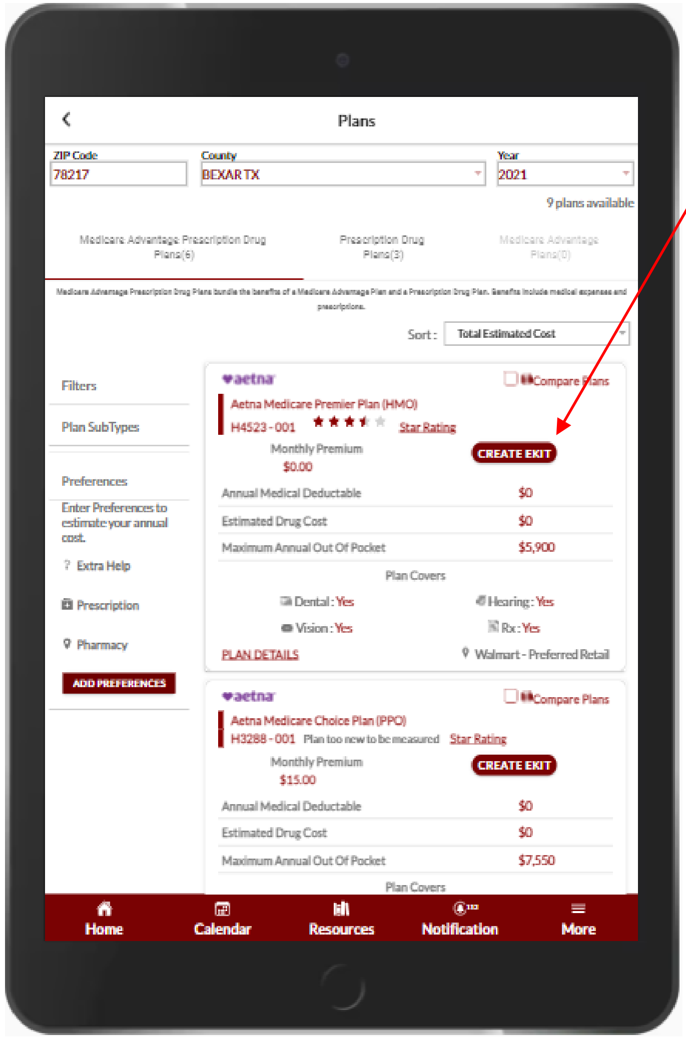
Populate the Lead template and click **Save**.



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



eKit

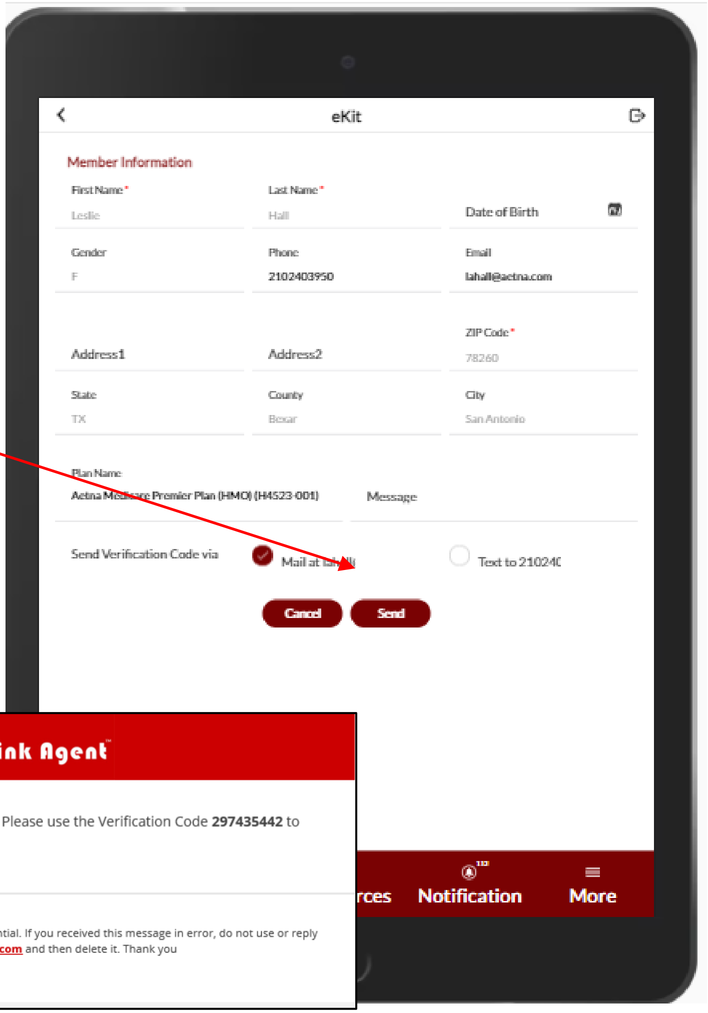


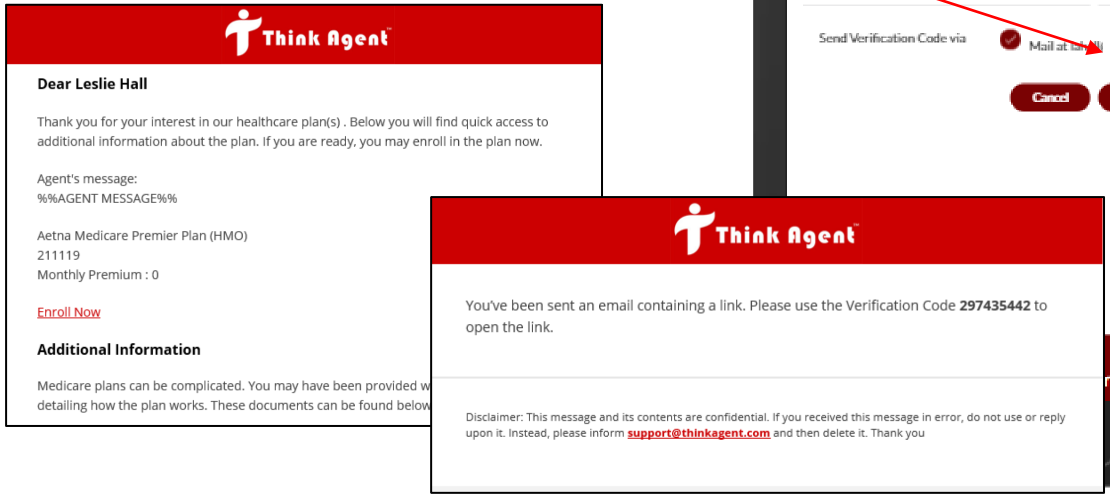
Next you will select your plan by clicking **Create eKit.**

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!

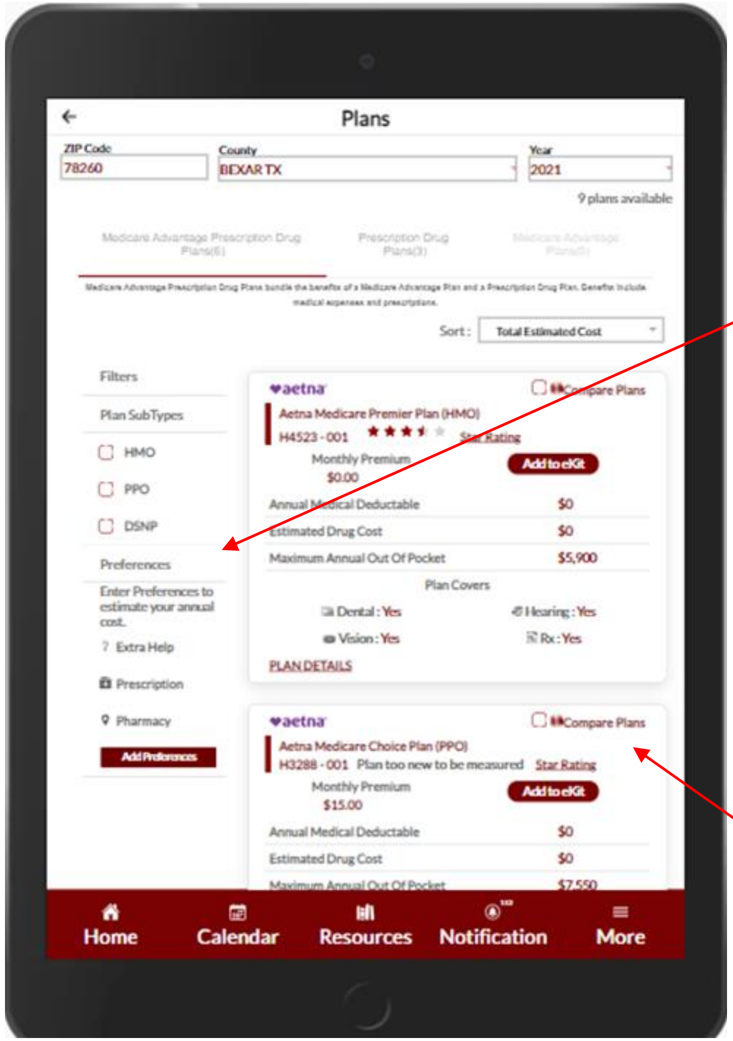
To send the eKit, click **Send**.

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





Did you know?



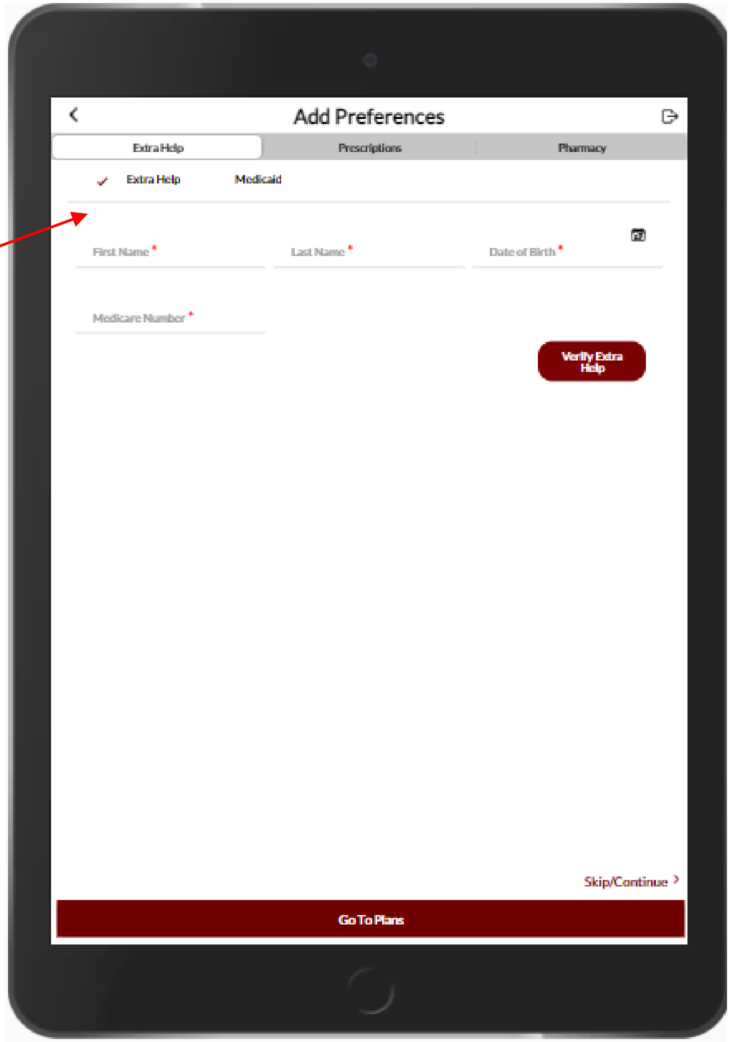
Before you send an eKit, you can filter for **Specific Plan Sub Types** and **Add Preferences**.

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

Think Agent™

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.

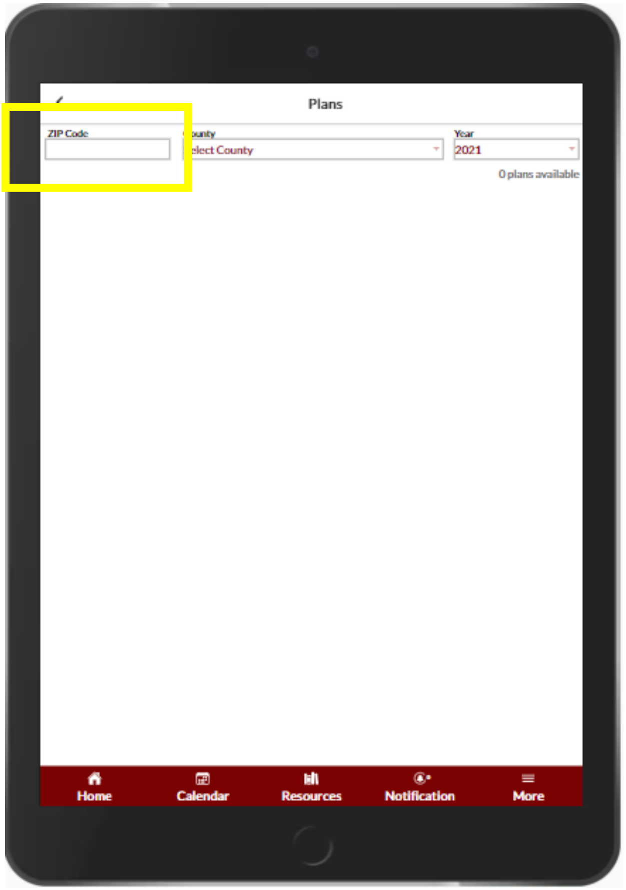
You will be able to:

- 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

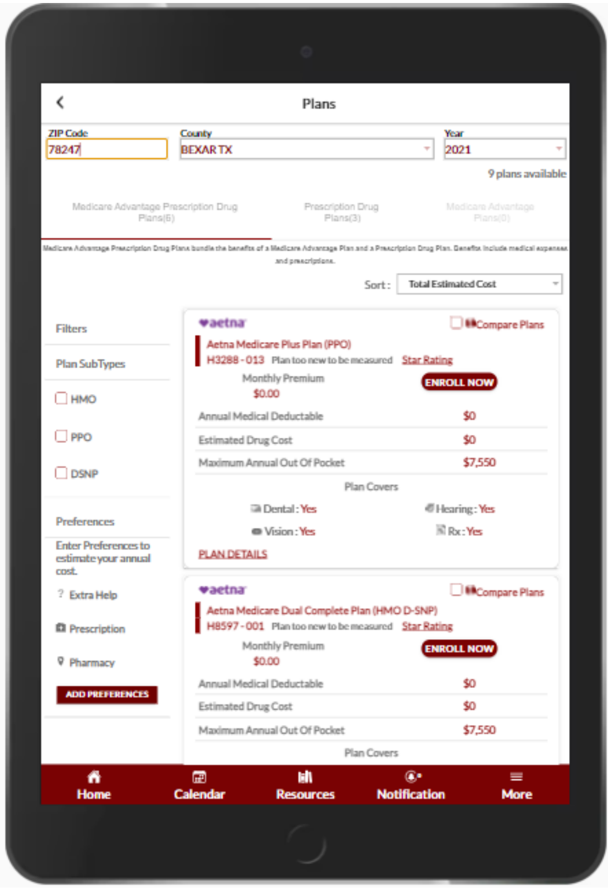
To find a plan from the Sales dashboard, select **Find Plan**.

Find Plan

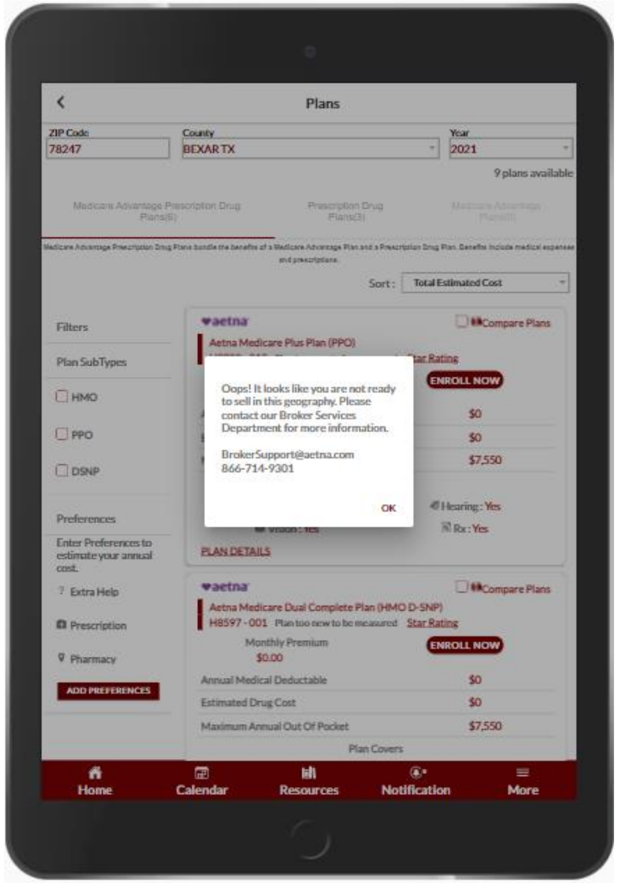
To find a plan, populate a zip code.



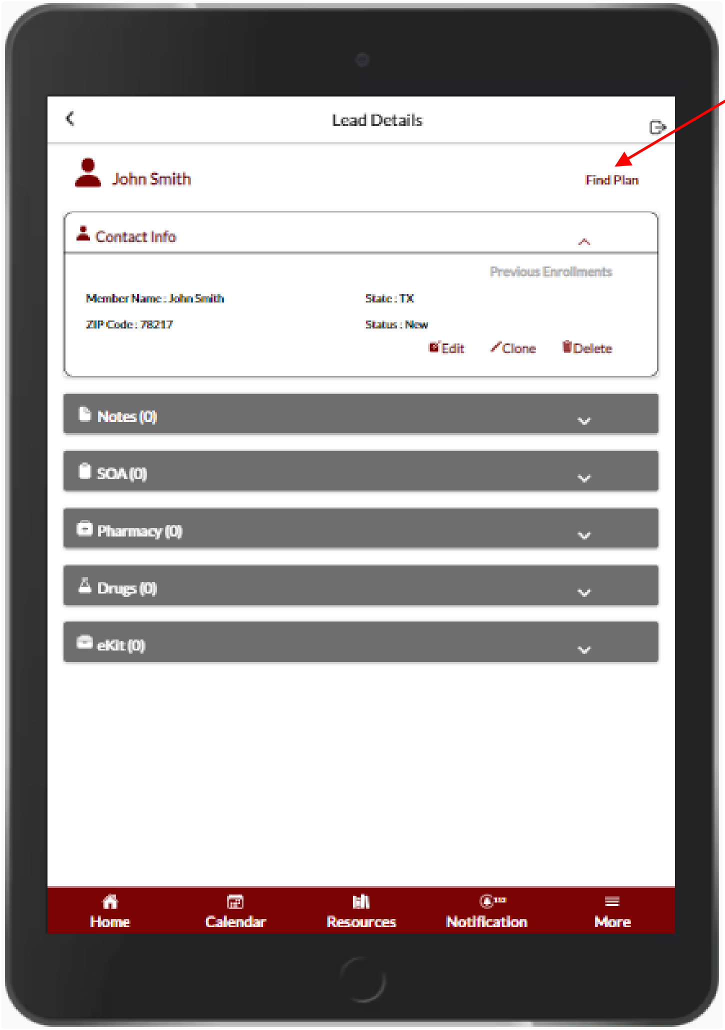
All plans in that geography will populate. To enroll a beneficiary, select **Enroll Now**.



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.

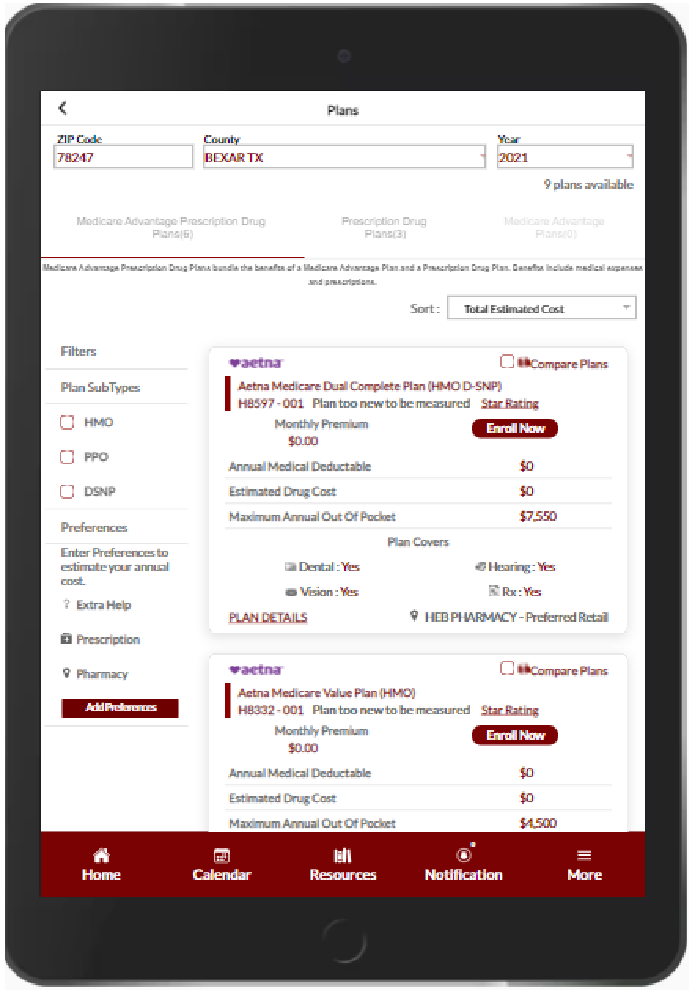
You will now be taken to the available plans for the beneficiary.

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.*



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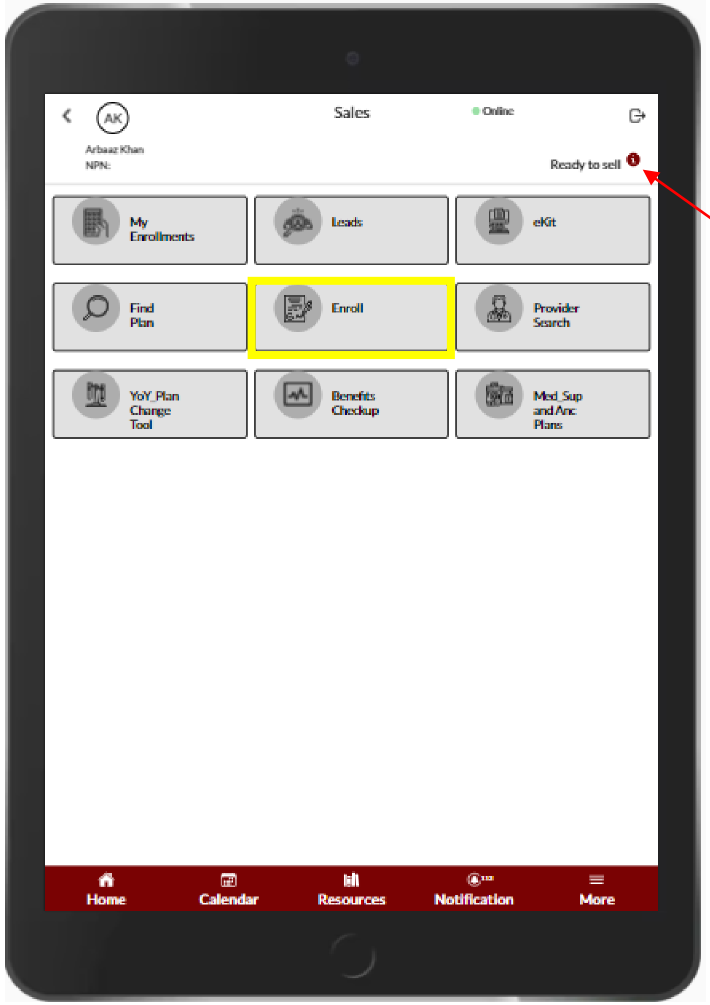
Enroll

Think Agent™

Enroll



Think Agent <u>will not</u> 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**.

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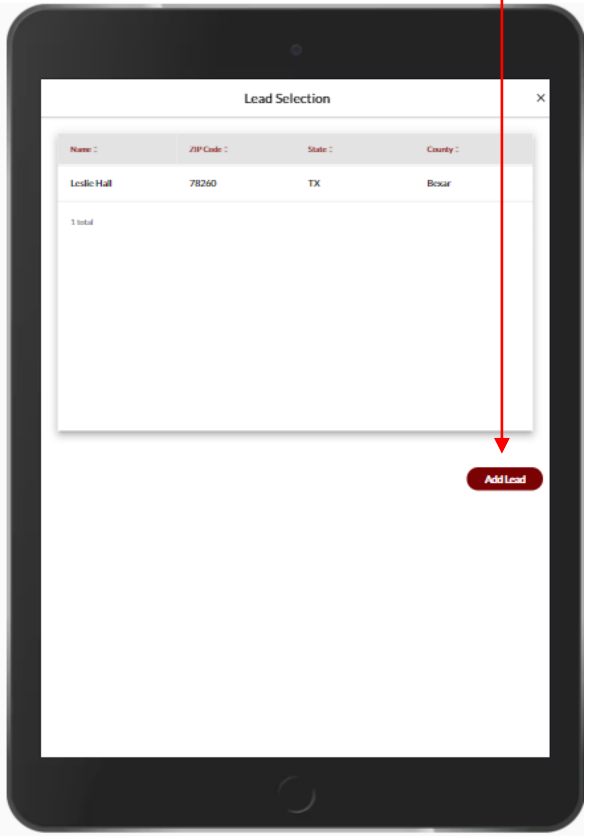
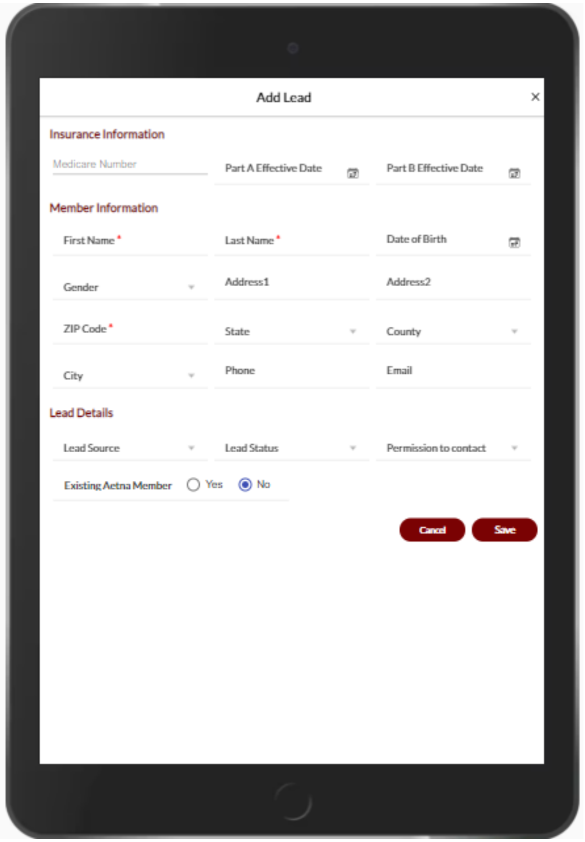
Enroll

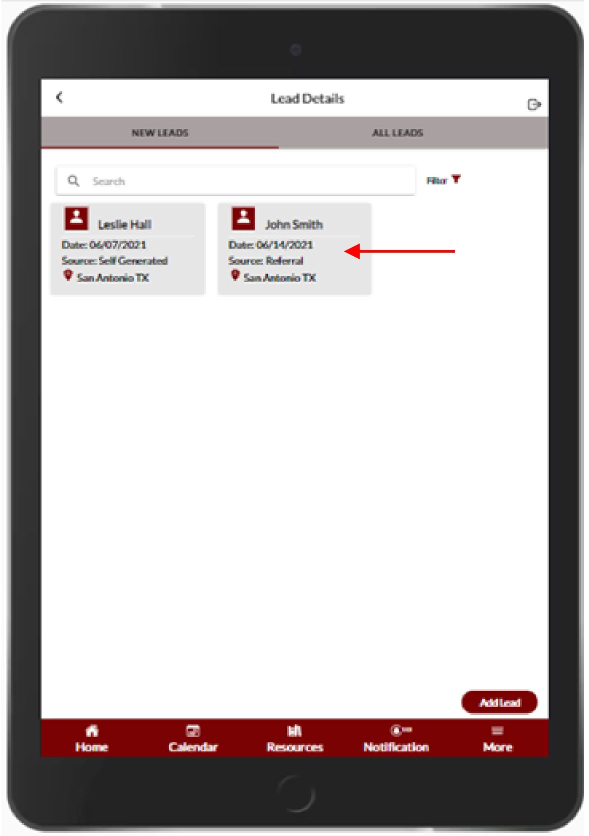
To select an existing lead, double click the Lead Name. To add a new lead, select **Add Lead**.



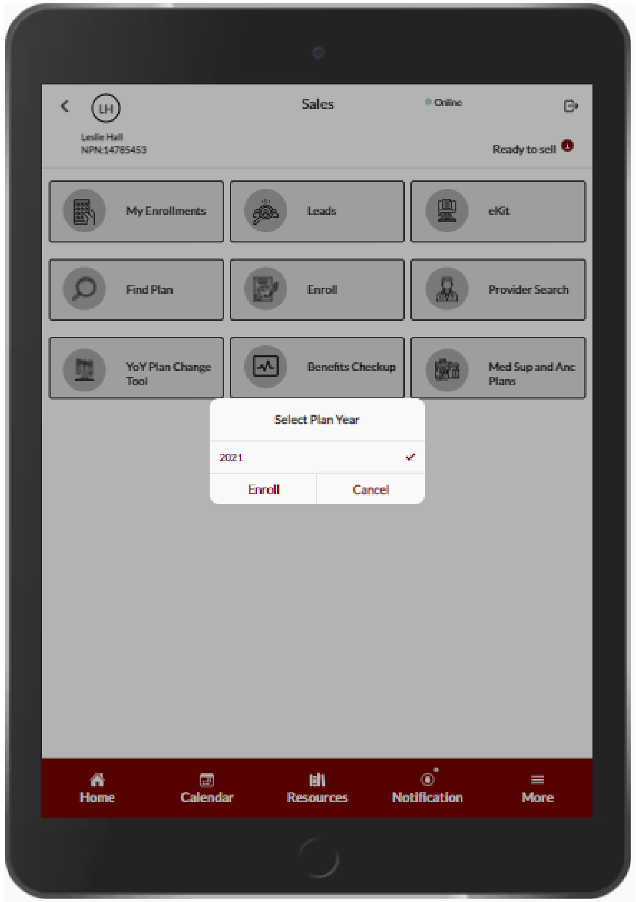
Populate the Lead template and click **Save**.



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



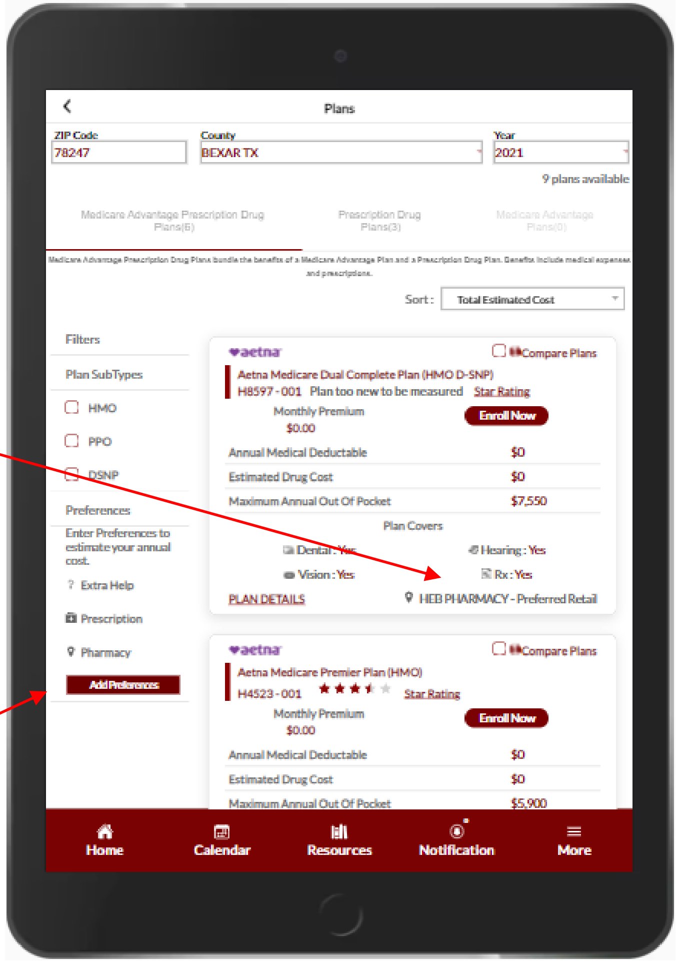
Enroll



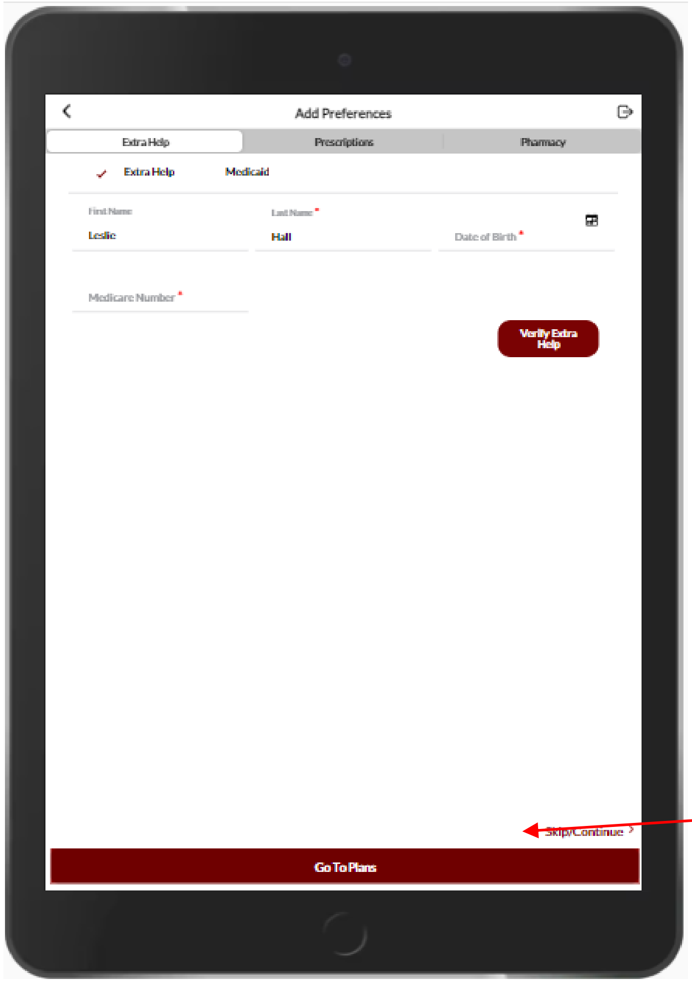
Next, you will select the appropriate plan year for enrollment. Multiple plan year selection will be offered during the AEP timeframe.

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

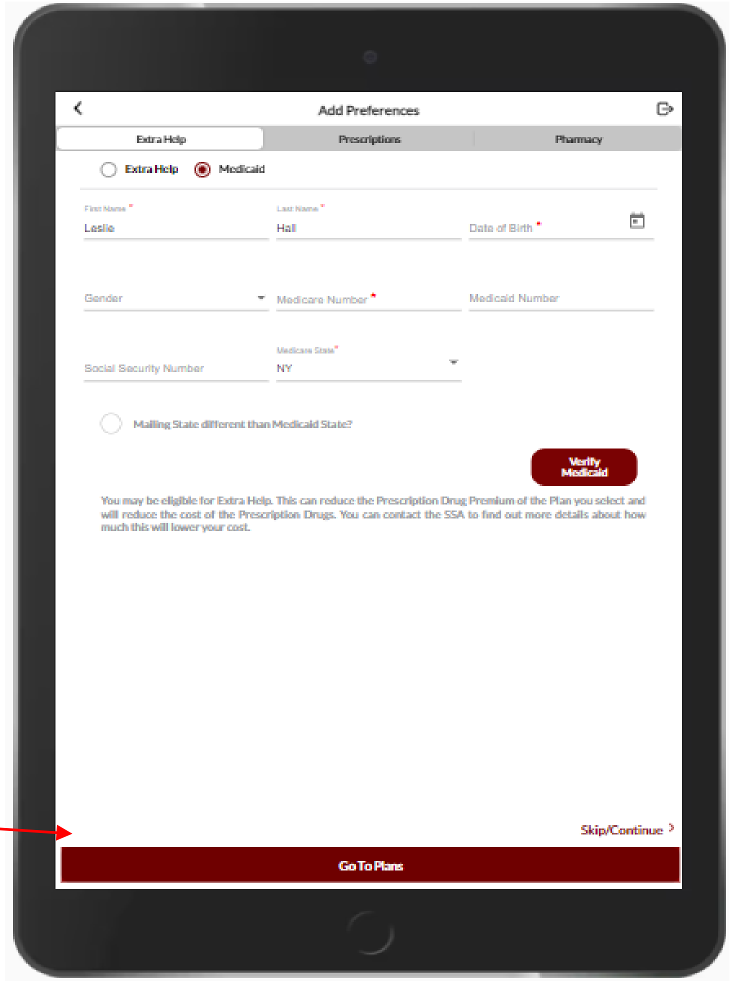


Extra Help and **Medicaid** Eligibility fields will auto populate if the criteria is documented on the Lead record.

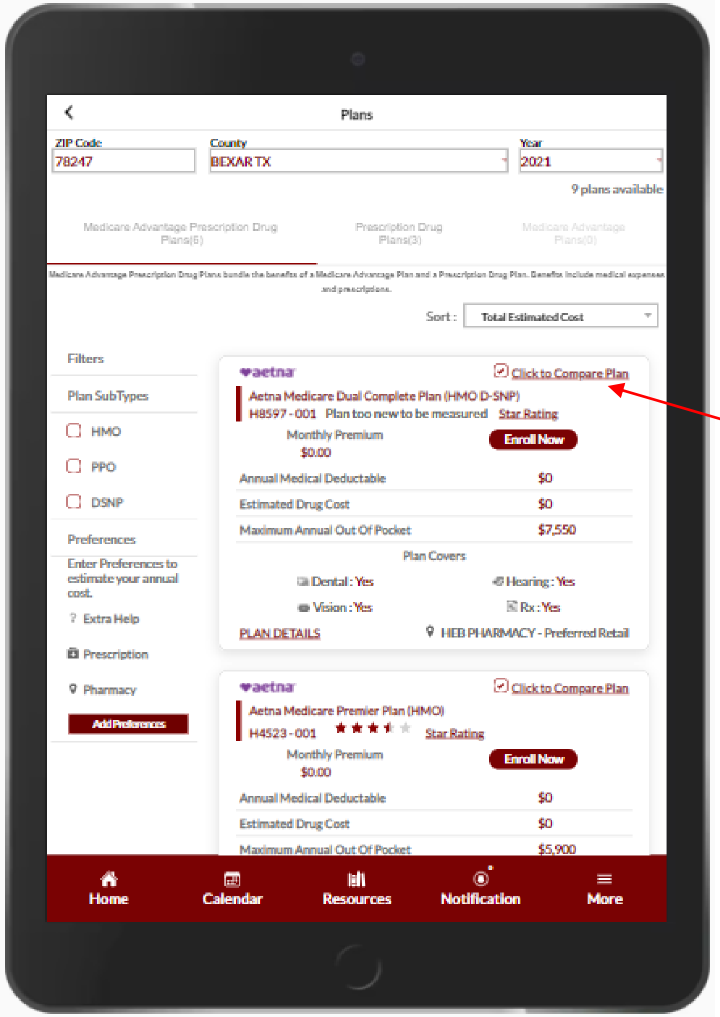
Required fields are denoted by the red asterisk *. Once all required fields are populated, select **Verify Extra Help** or **Verify Medicaid**.

Your results will populate.

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

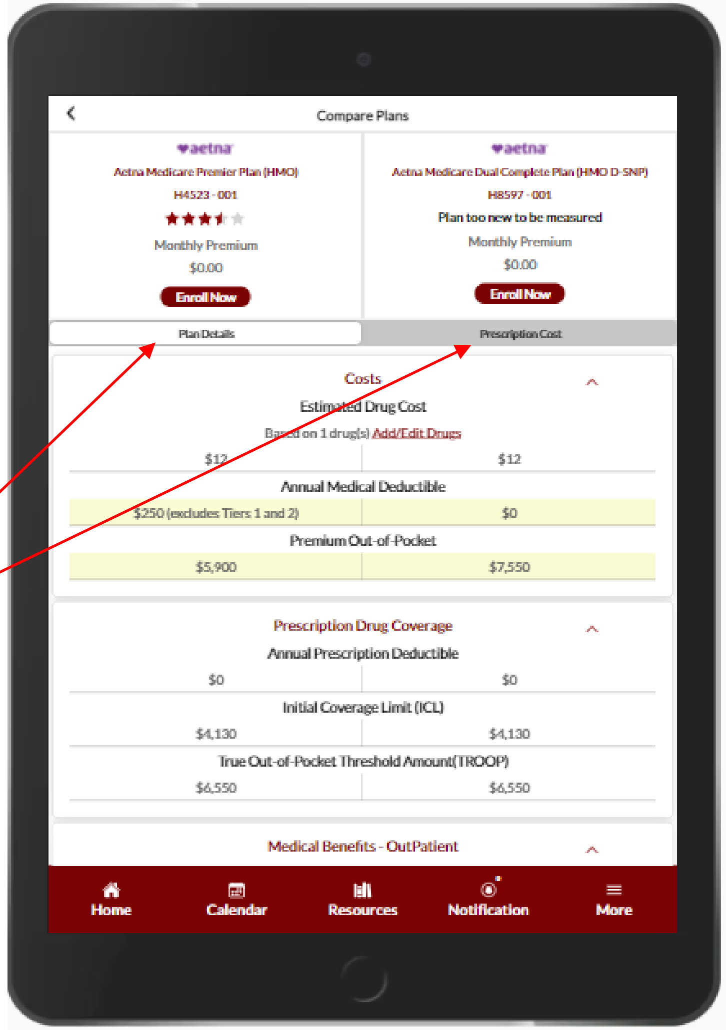


Compare Plans



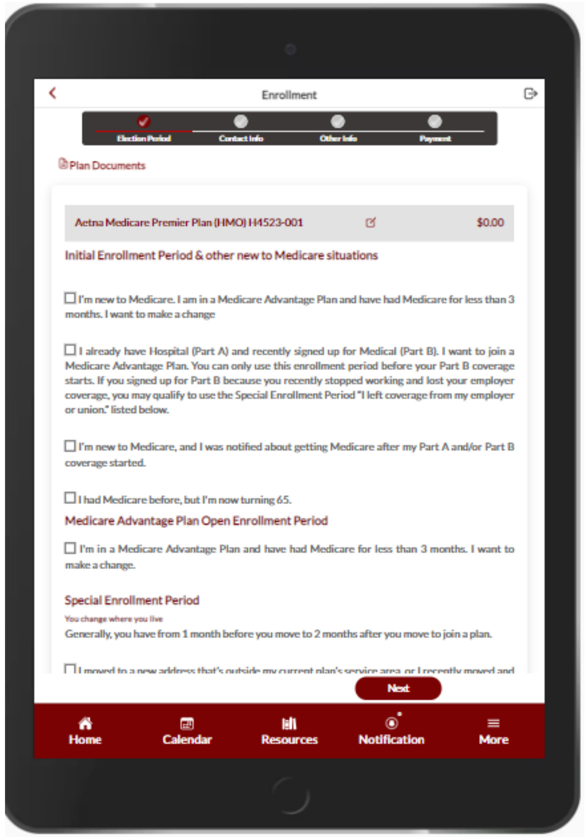
You can compare up to three (3) plans at a time in Think Agent. To compare plans, check the box next to the plans you would like to view. Once your plans have been selected, **Click to Compare Plans**.

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

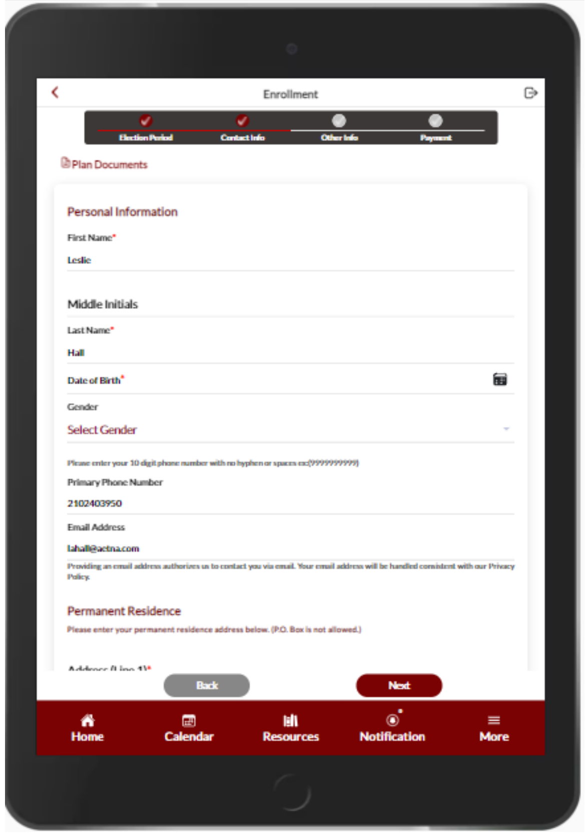


Enrollment Screens

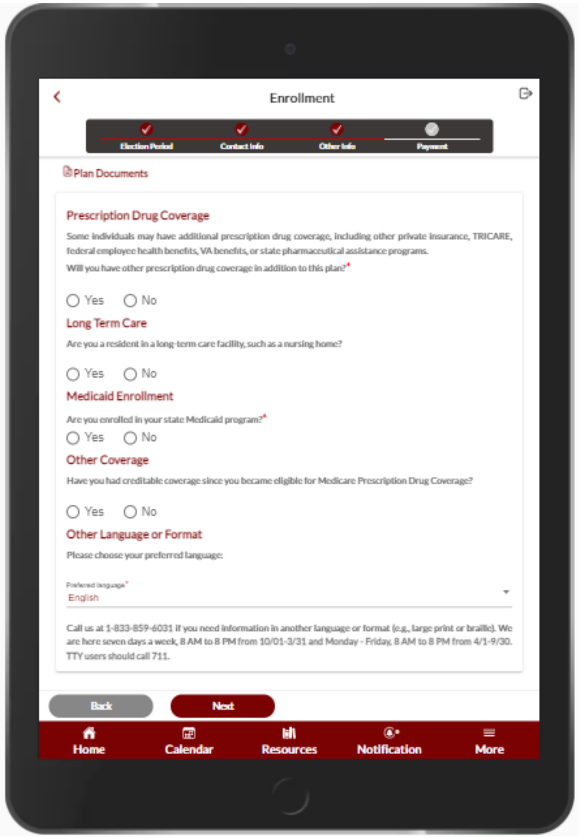
Election Period



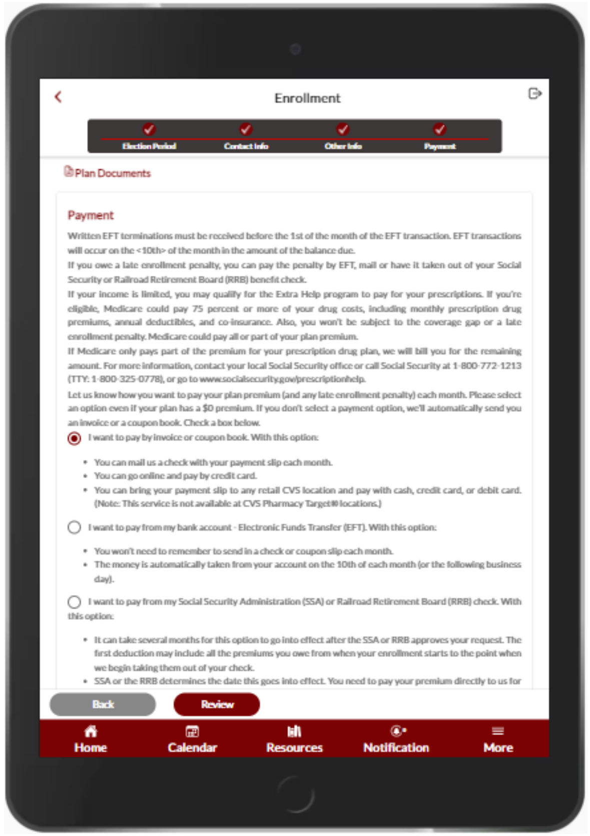
Contact Info



Other Info



Payment



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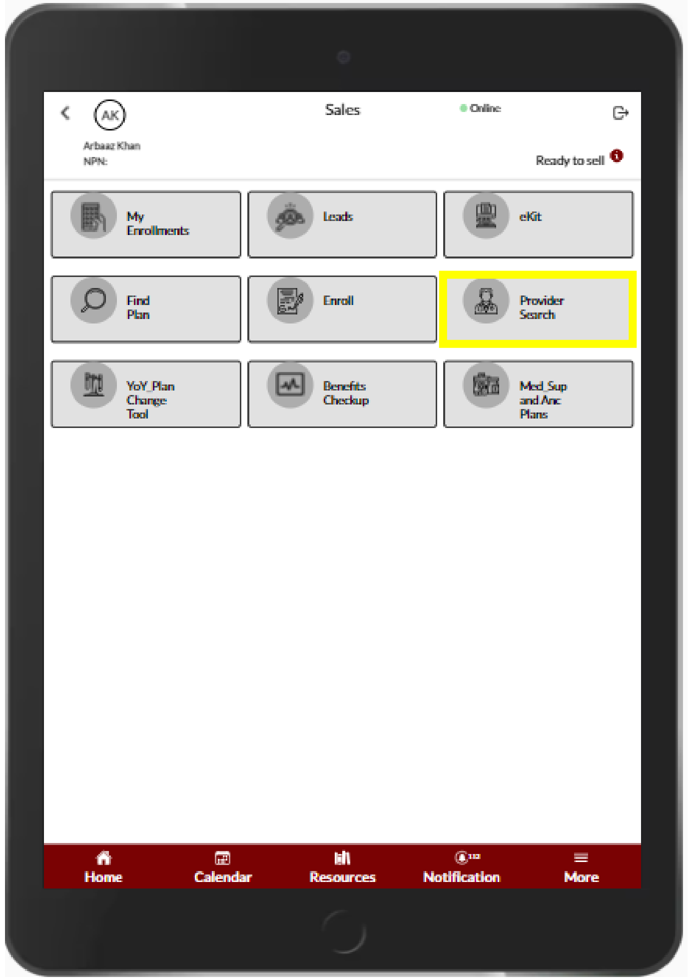
Provider Search

Think Agent™

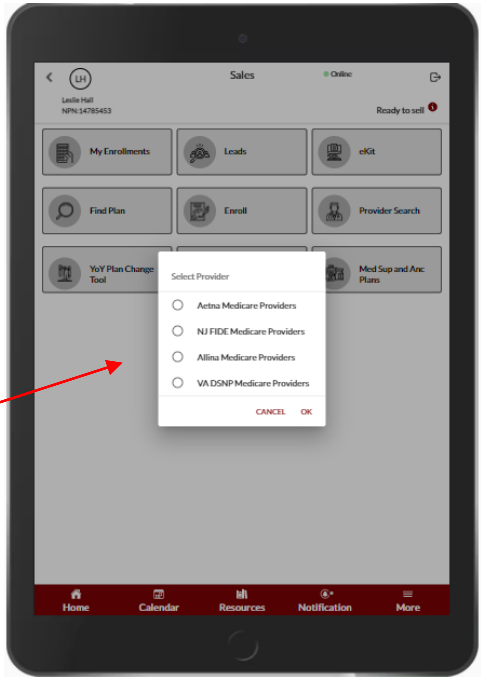
Provider Search



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

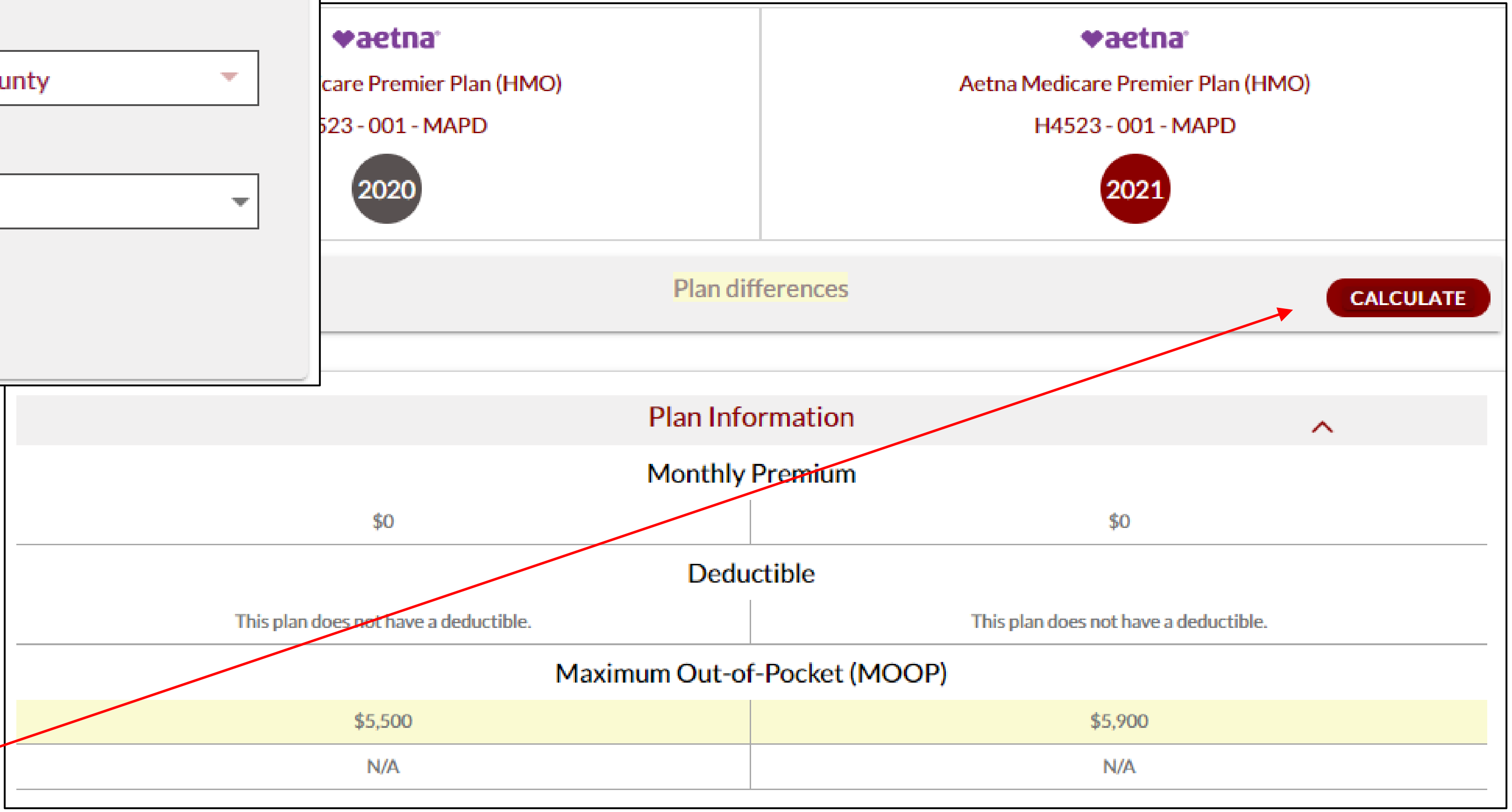
Think Agent™

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!

Year Over Year Plan Change Tool



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**.

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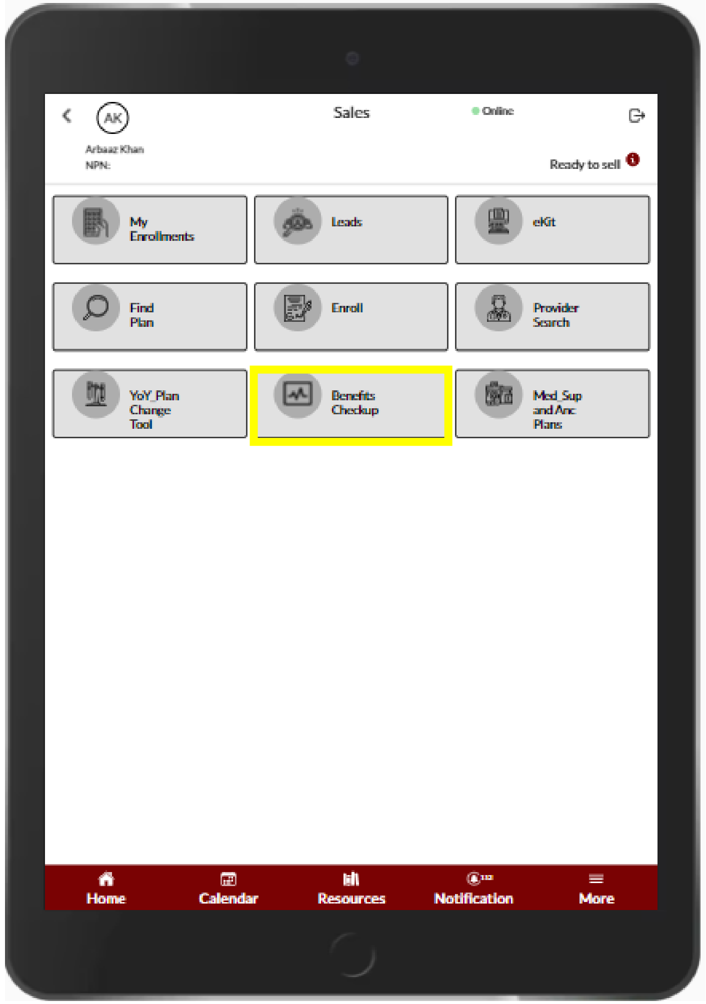
Benefits Check Up

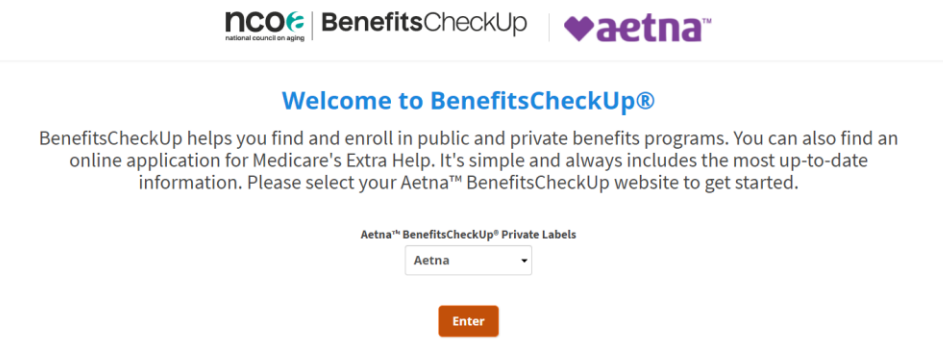
Benefits Check Up



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.

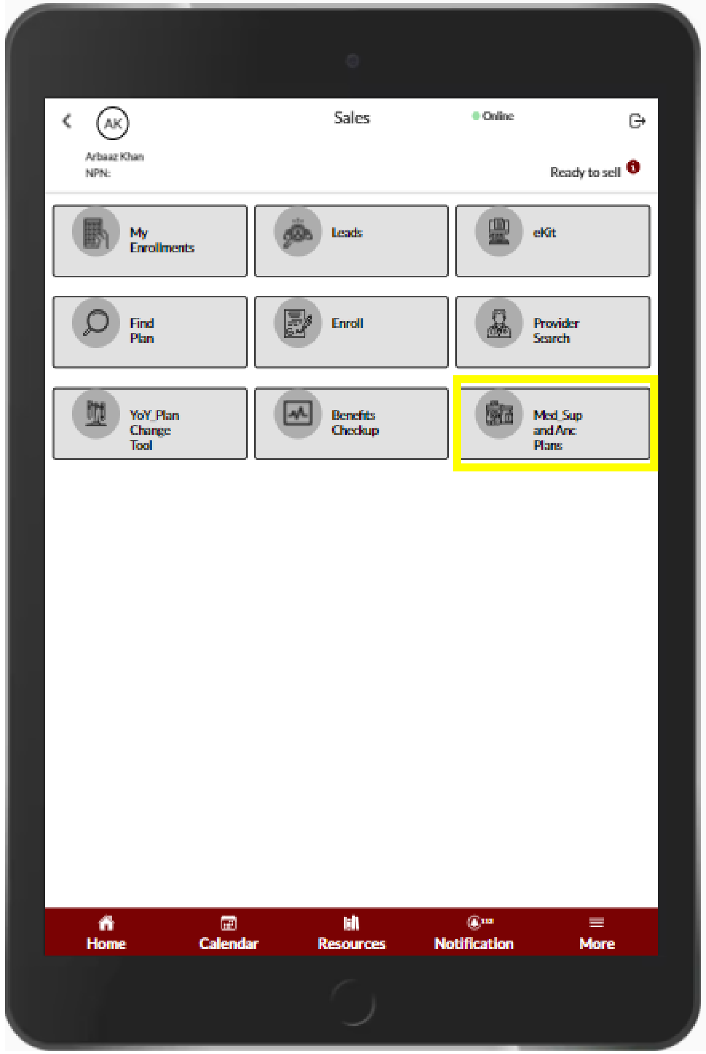
Benefits Check Up may help with the following expenses:

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



Medicare Supplement and Ancillary Plans

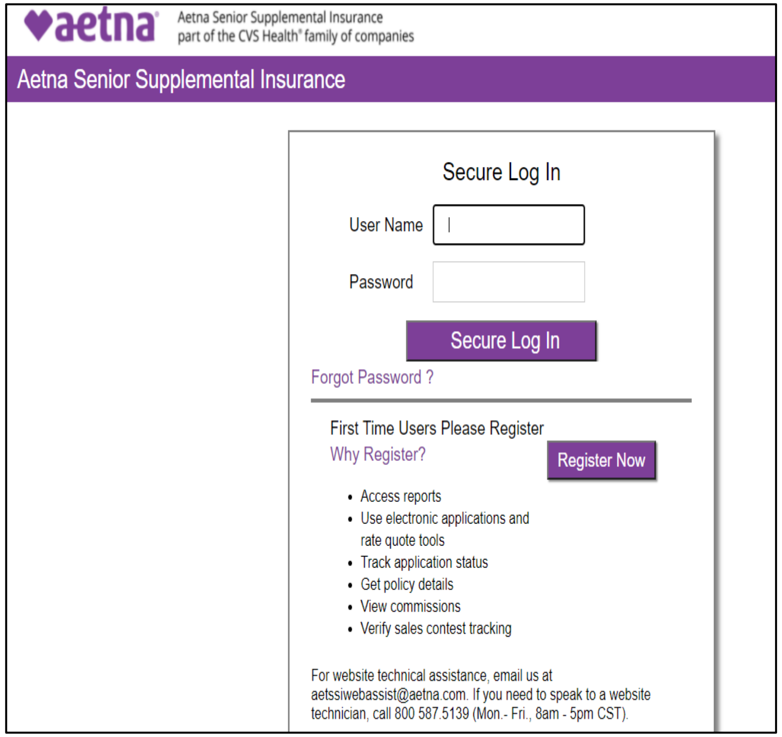
Medicare Supplement and Ancillary Plans



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.

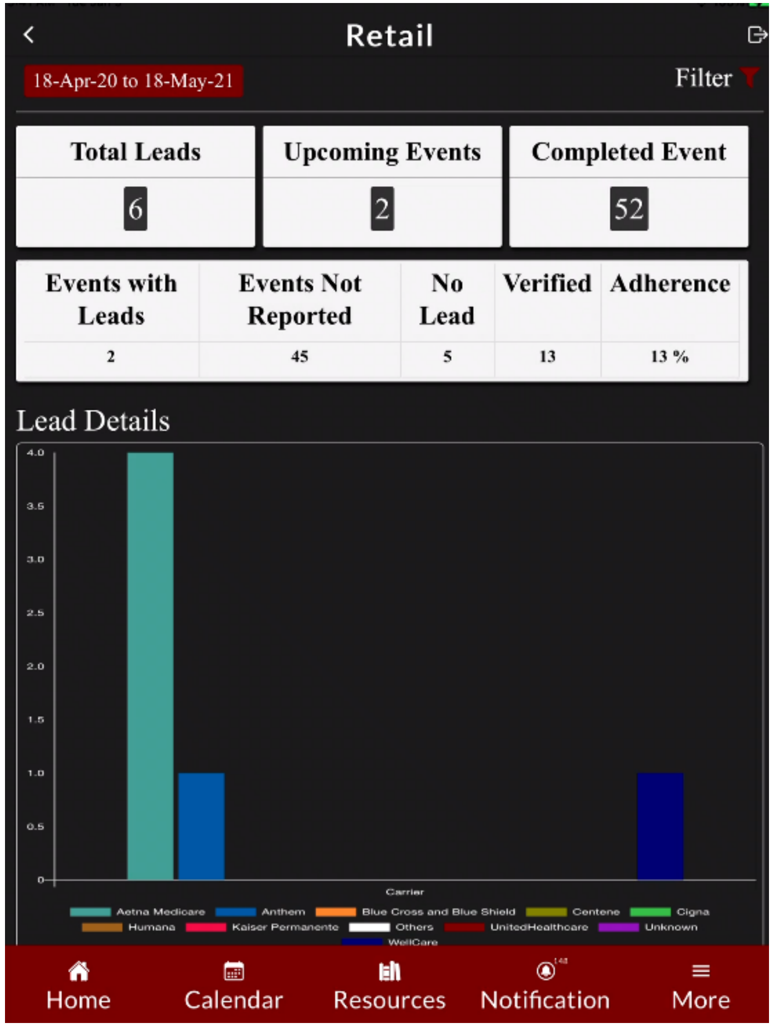
Cost efficient retail bundles are competitively priced and drive a consistent look and feel across all events.

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!

Medicare
RETAIL SALES & STRATEGY

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.

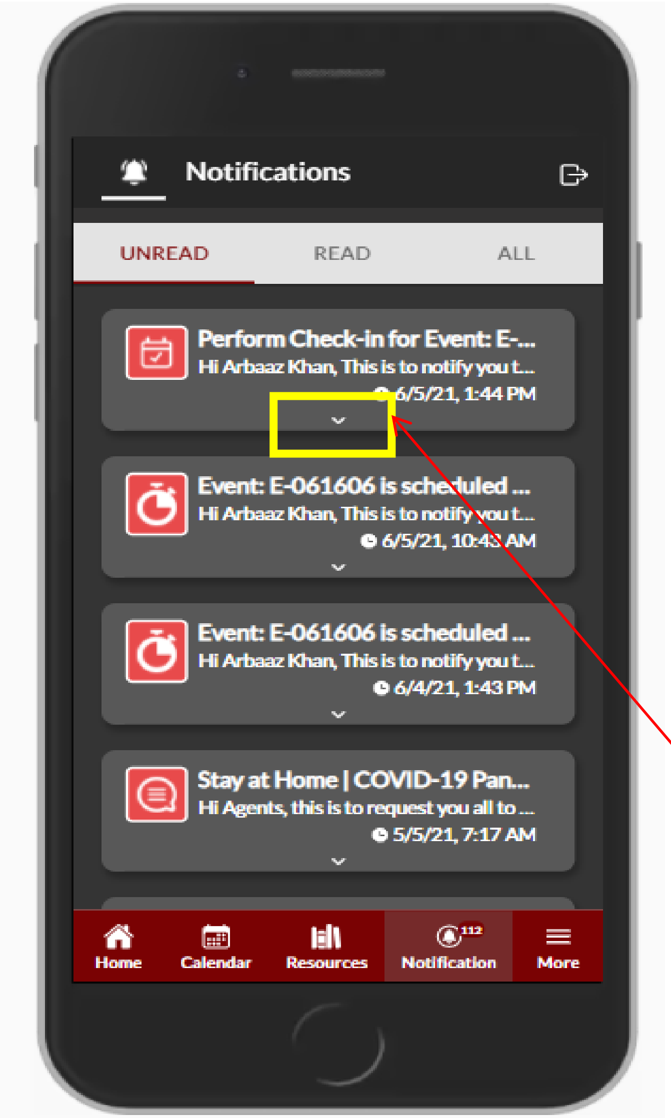
No Lead – total events where you received 0 leads and you clicked the No Leads box.

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.

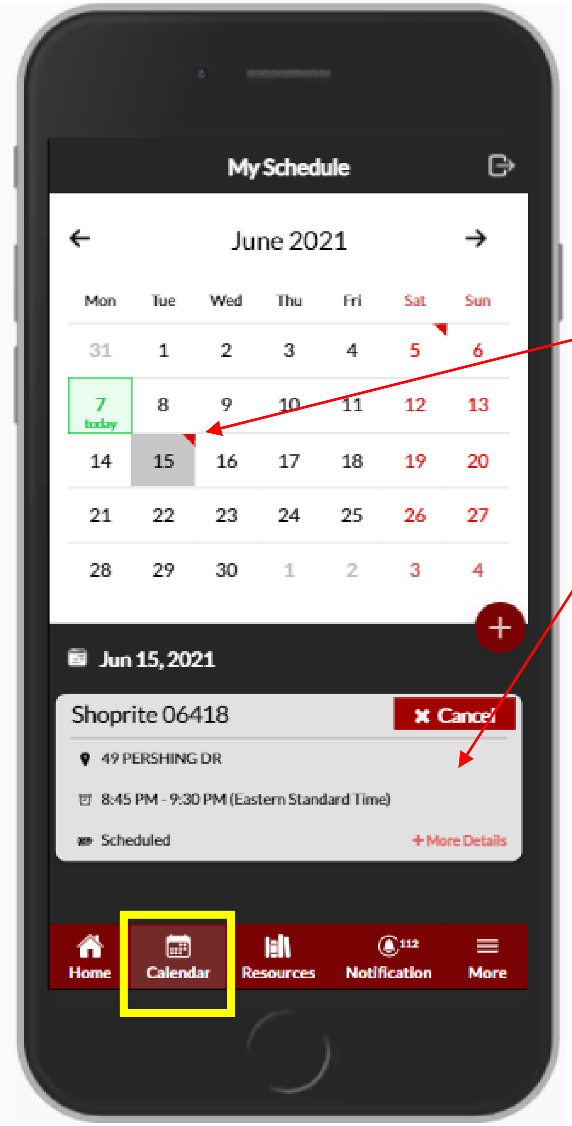
Newly Scheduled Events are events you have requested through Think Agent and are now approved and show in your calendar.

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



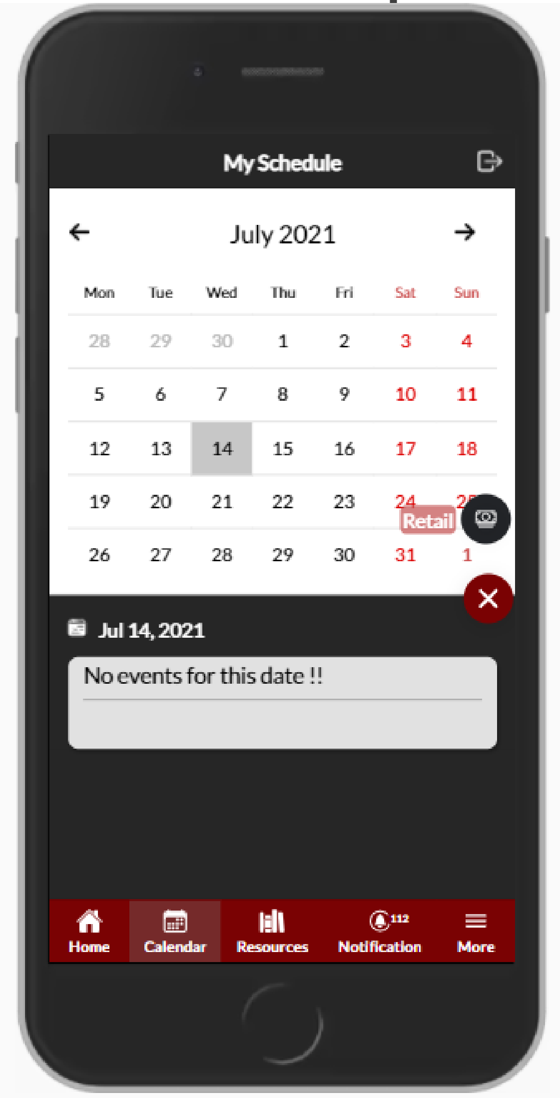
Click on the **Calendar** at the bottom of your Home screen. Your calendar will display your scheduled events.

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

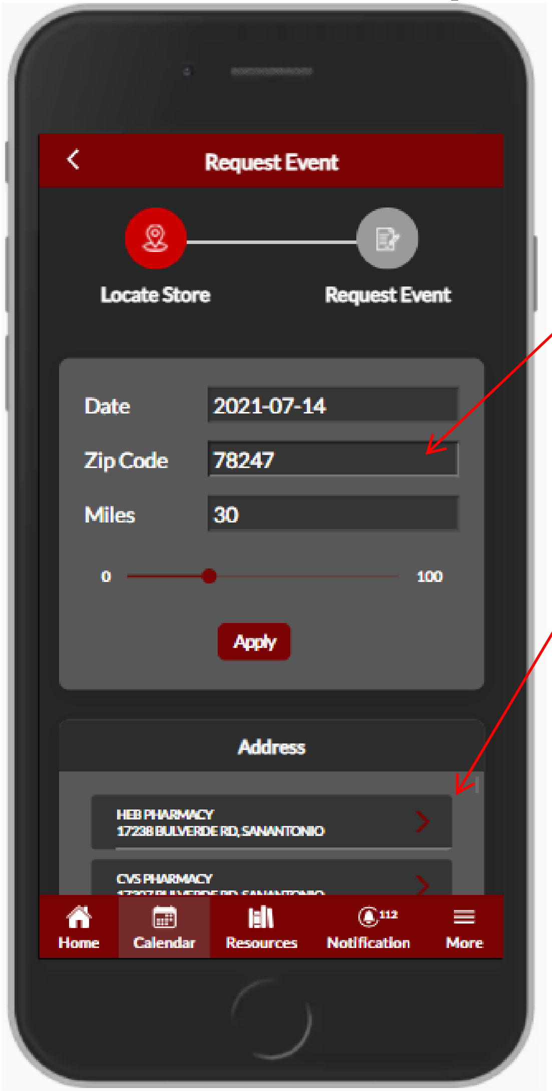


Did you know that you can request Retail events on Think Agent? You can!

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

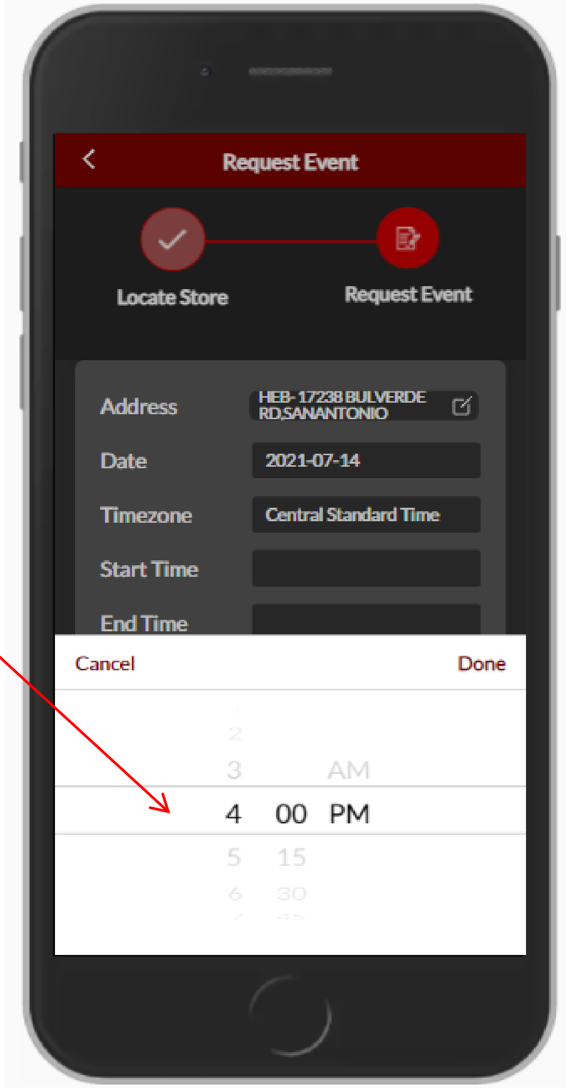
To request a Retail event, please access your calendar, select your preferred day and click the **+** sign. You will be presented with the **Retail icon**. Select the icon to advance to the next screen.

Retail – Requesting Events

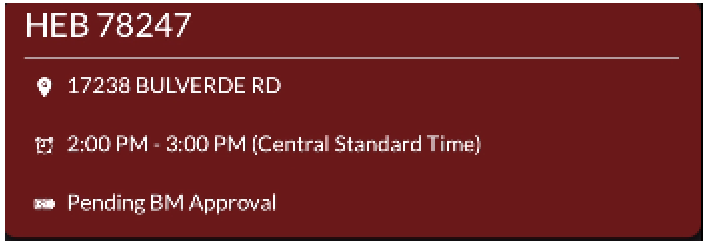


Next, enter in a zip code and adjust miles if applicable.

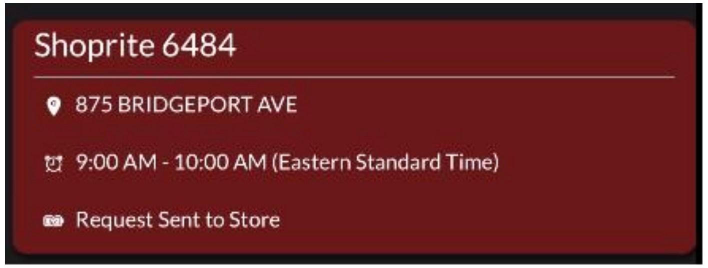
Select your location and enter in Start and End times and click Submit.



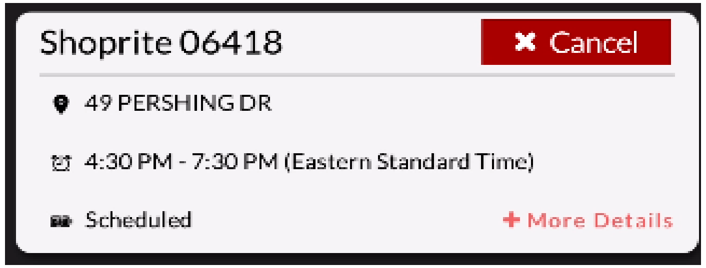
Retail – What happens next?



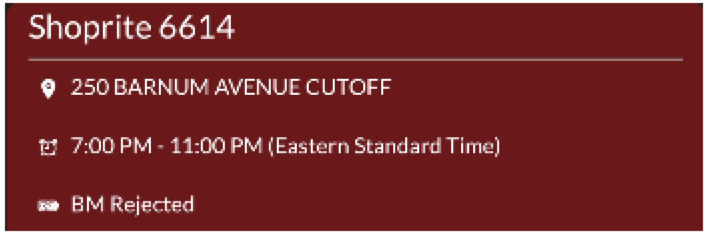
When you submit your event through Think Agent, the event status will state **Pending BM Approval**. Your Broker Manager will have 4 days to review and approve your event submission. Broker Managers are automatically notified when you submit an event for approval.



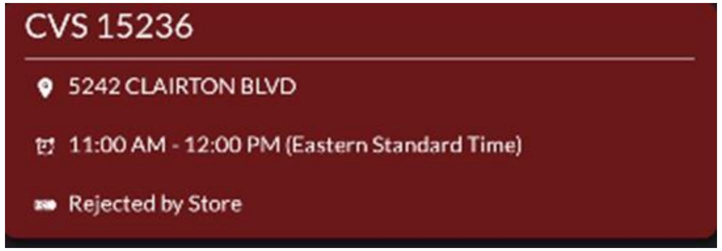
Your event status will change to **Request Sent to Store** once your Broker Manager approves the event.



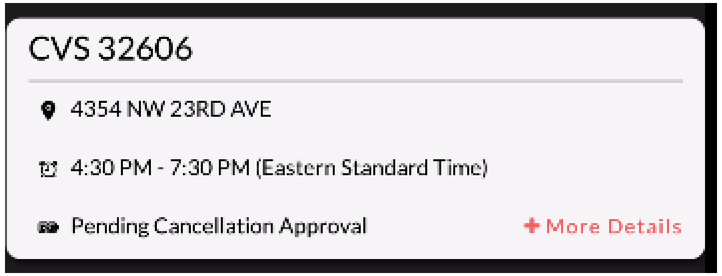
Your event status will change to **Scheduled** when your Broker Manager and the store approves your date and time request.



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

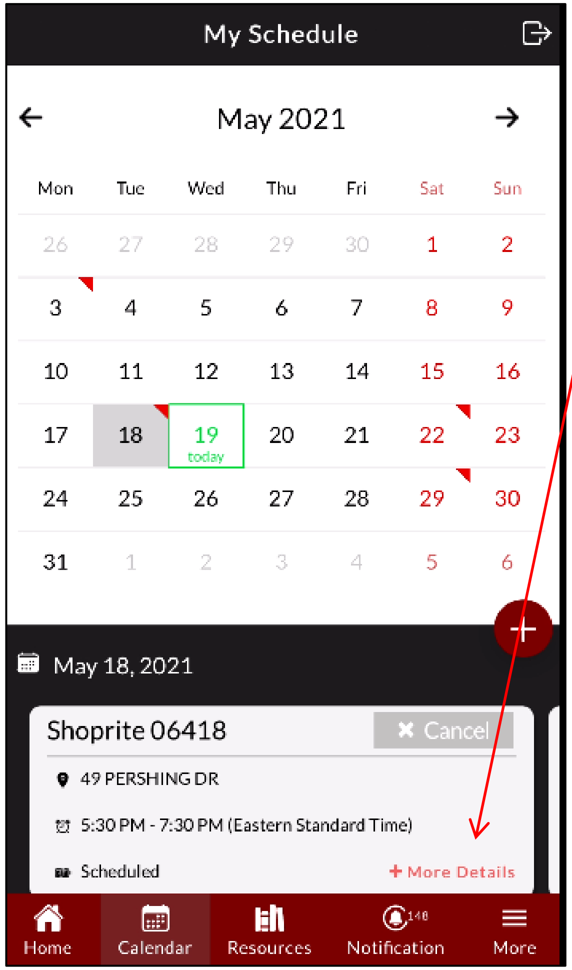


Rejected by Store means that the store rejected your event submission because the store had no availability to have you there.



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.

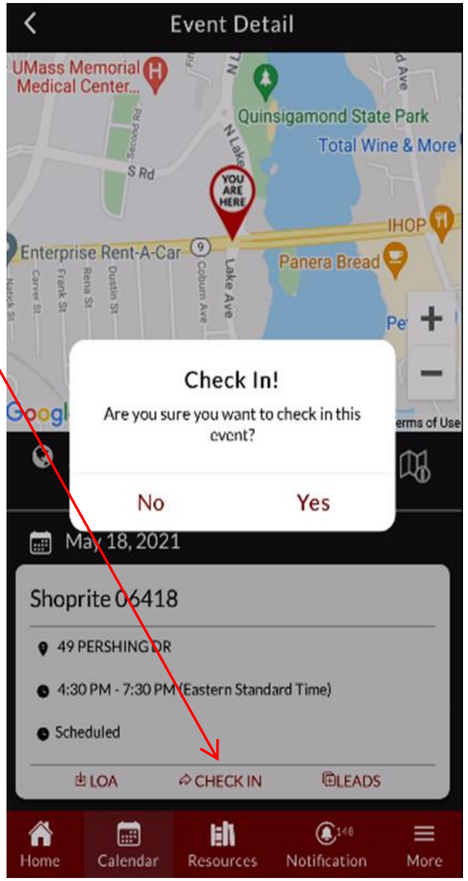
Retail – Manually checking into your event

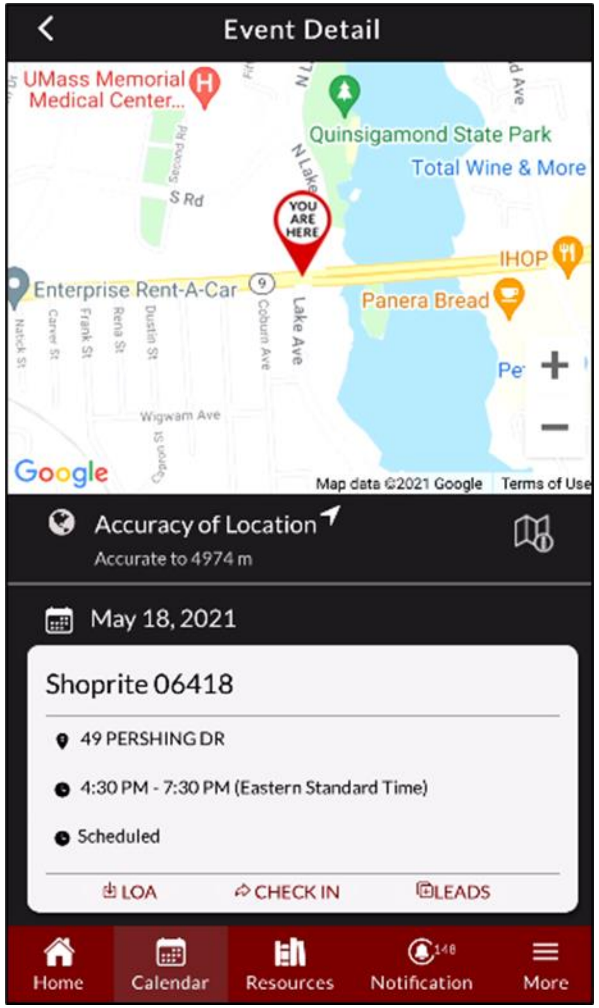


To check into your event, select today's date on the calendar and select the **+ More Details** tab on the event card. You can check in to events ½ hour before your event.

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.





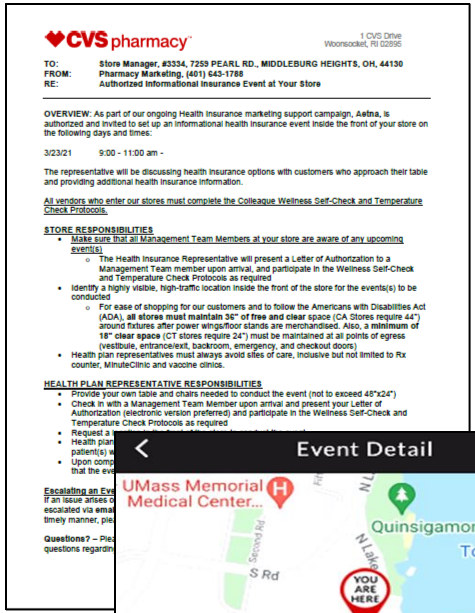
Retail – Automatically checking into event

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.



CVS pharmacy

1 CVS Drive
Woonsocket, RI 02895

TO: Store Manager, #3334, 7259 PEARL RD., MIDDLEBURG HEIGHTS, OH, 44130
FROM: Pharmacy Marketing, (401) 643-1788
RE: Authorized Informational Insurance Event at Your Store

OVERVIEW: As part of our ongoing Health Insurance marketing support campaign, Aetna, is authorized and invited to set up an informational health insurance event inside the front of your store on the following days and times:

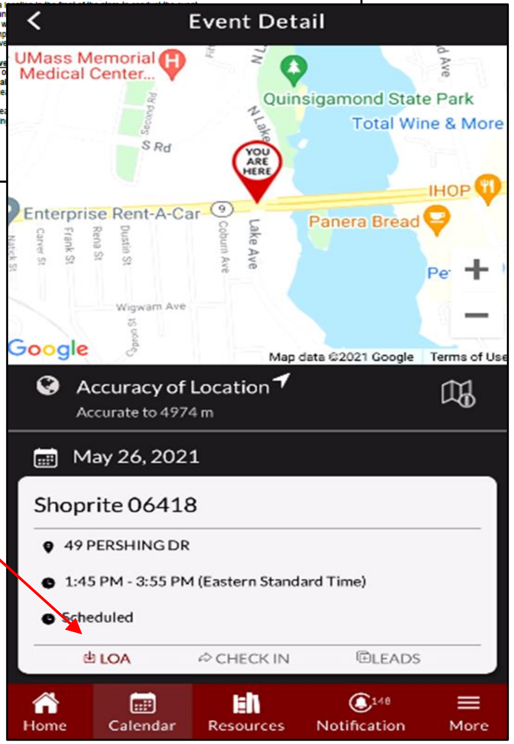
3/23/21 9:00 - 11:00 am -

The representative will be discussing health insurance options with customers who approach their table and providing additional health insurance information.

All vendors who enter our stores must complete the Colleague Wellness Self-Check and Temperature Check Protocols.

STORE RESPONSIBILITIES
- Make sure that all Management Team Members at your store are aware of any upcoming event(s)
  - The Health Insurance Representative will present a Letter of Authorization to a Management Team member upon arrival, and participate in the Wellness Self-Check and Temperature Check Protocols as required
- Identify a highly visible, high-traffic location inside the front of the store for the events(s) to be conducted
  - For ease of shopping for our customers and to follow the Americans with Disabilities Act (ADA), **all stores must maintain 36" of free and clear** space (CA Stores require 44") around fixtures after power wings/floor stands are merchandised. Also, a **minimum of 18" clear space** (CT stores require 24") must be maintained at all points of egress (vestibule, entrance/exit, backroom, emergency, and checkout doors)
- Health plan representatives must always avoid sites of care, inclusive but not limited to Rx counter, MinuteClinic and vaccine clinics.

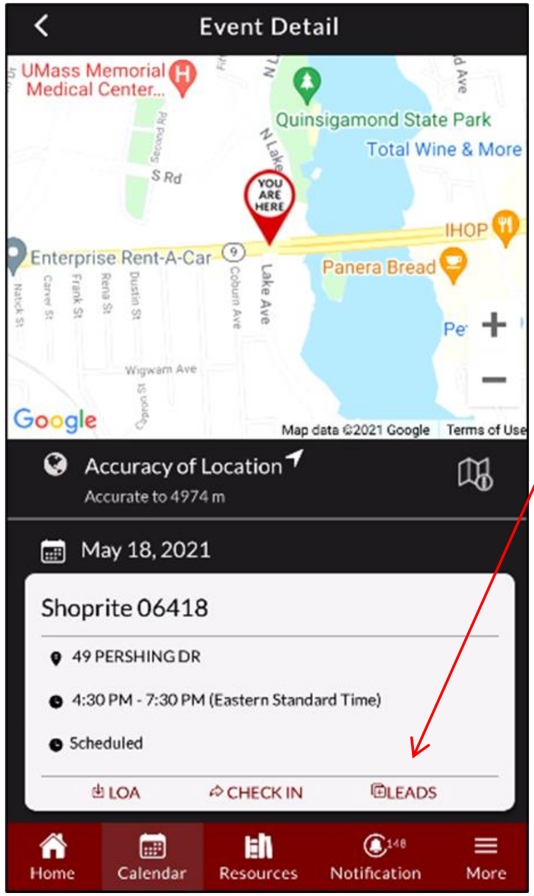
HEALTH PLAN REPRESENTATIVE RESPONSIBILITIES
- Provide your own table and chairs needed to conduct the event (not to exceed 48"x24")
- Check in with a Management Team Member upon arrival and present your Letter of Authorization (electronic version preferred) and participate in the Wellness Self-Check and Temperature Check Protocols as required



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.

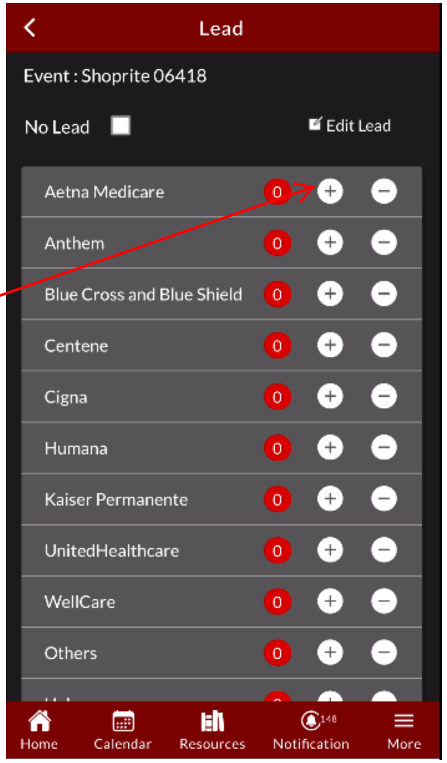
To document leads, please select **Leads** on the event card. The lead template will open.

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

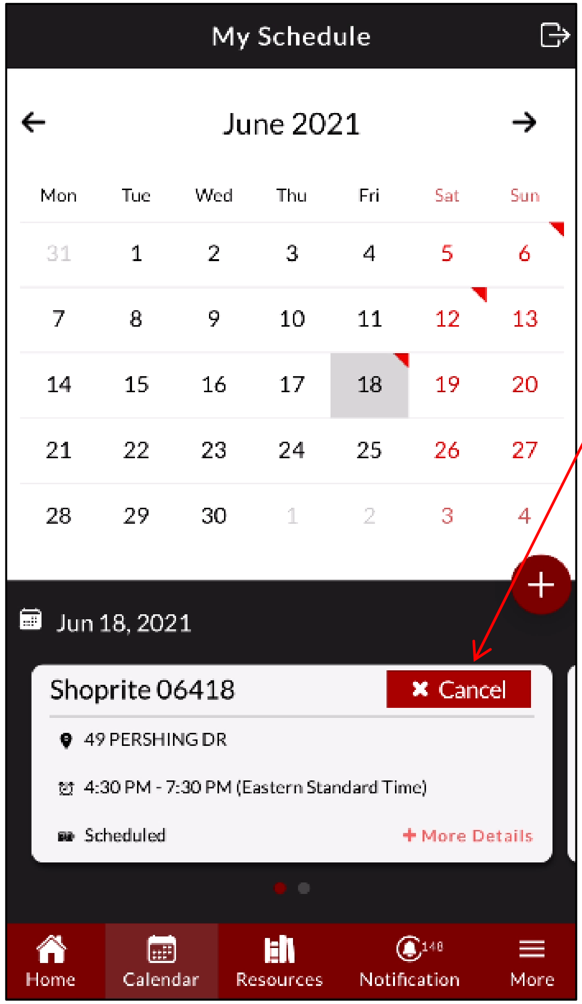
Hit the **+** sign by the name of the carrier.

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.



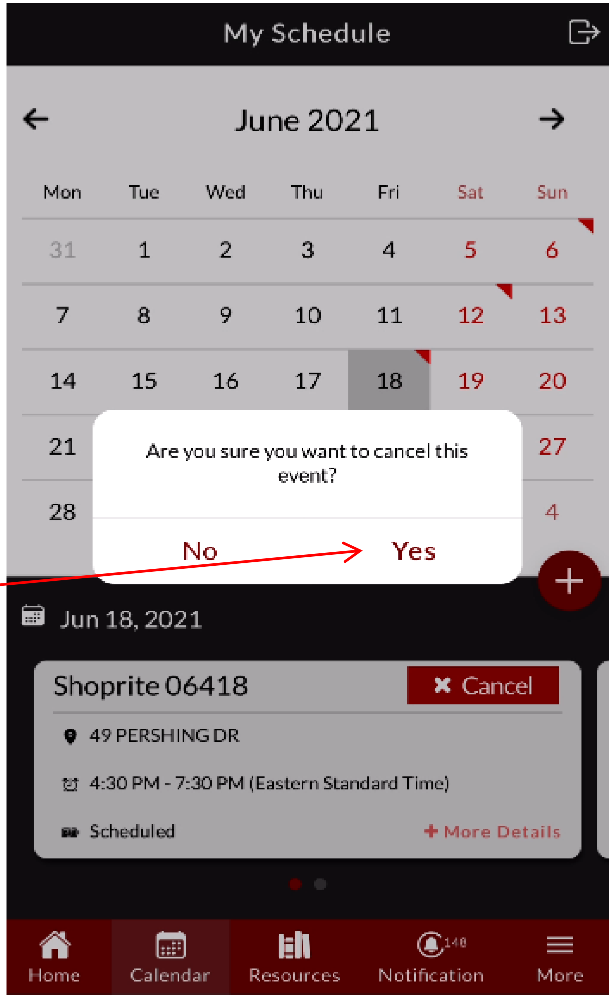
Retail – Cancelling events



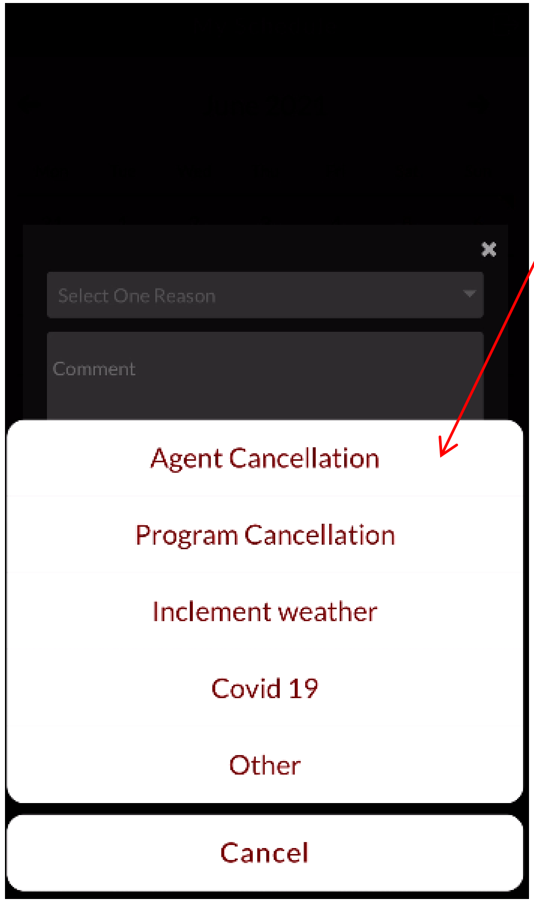
Did you know that you can cancel events on Think Agent? You can!

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**.



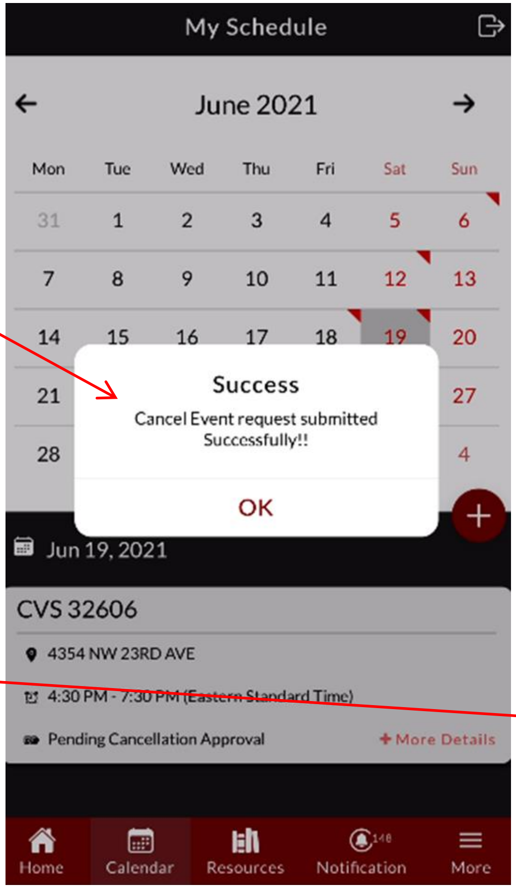
Retail – Cancelling events

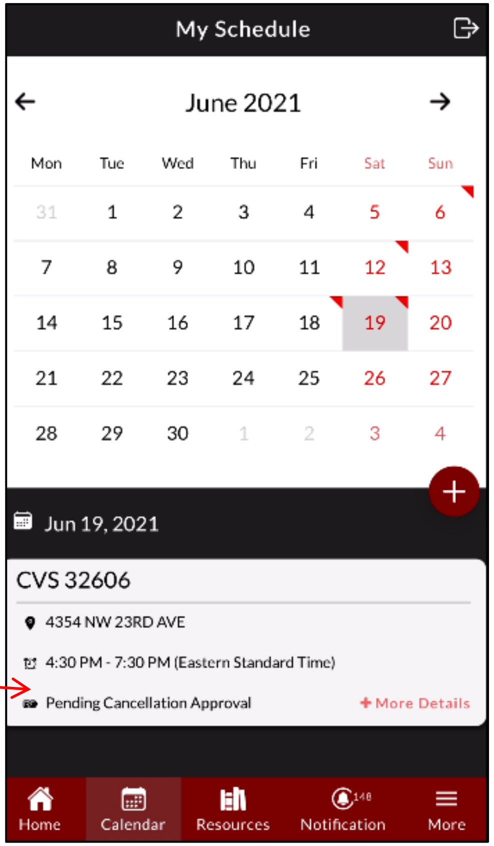


In order to process an event cancellation, you will need to provide a reason for the cancellation.

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.





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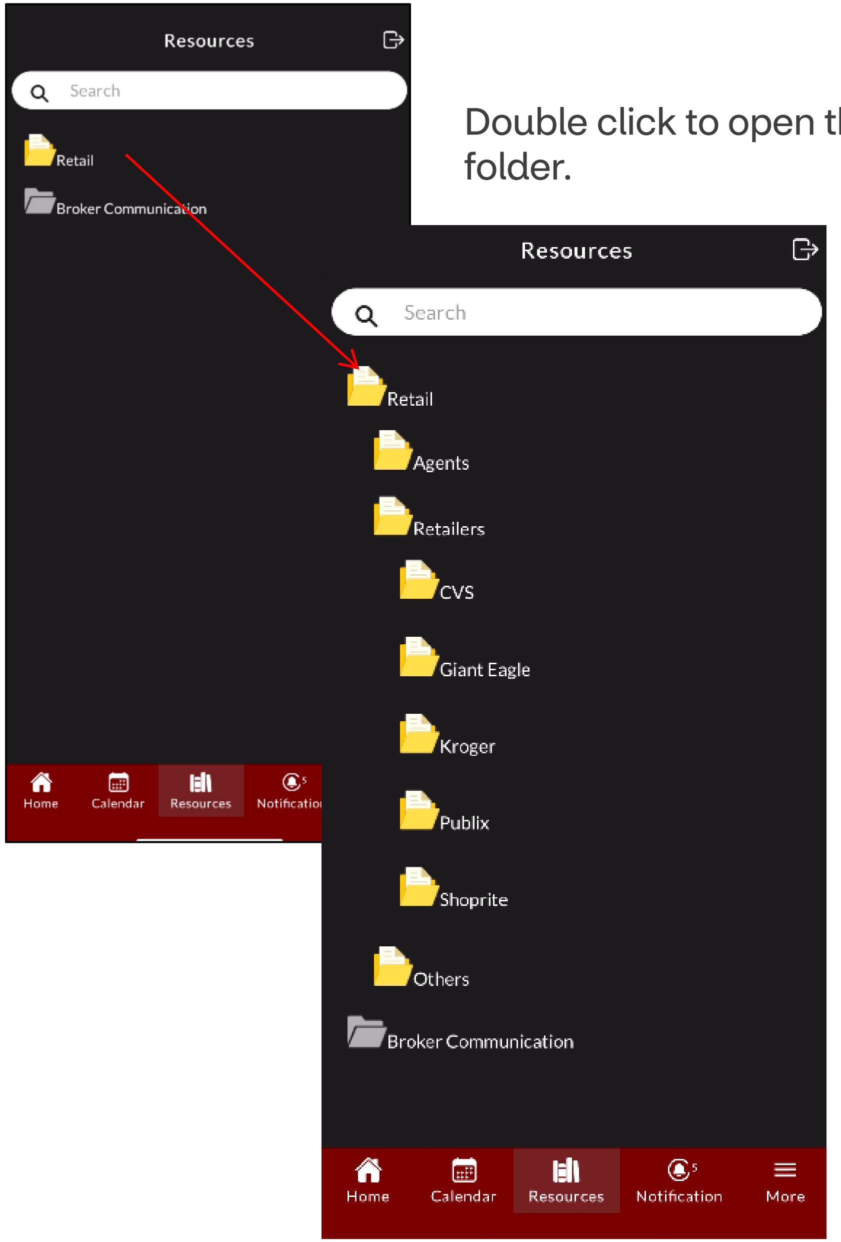
Retail - Resources

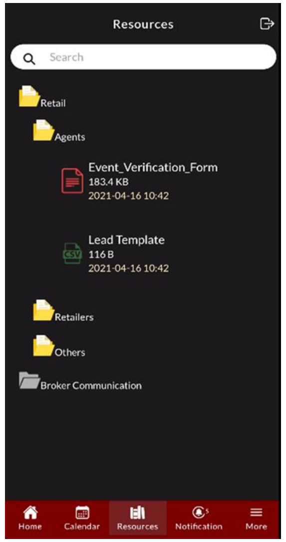
Resources are materials and/or guidelines that are used in support of the Retail program.

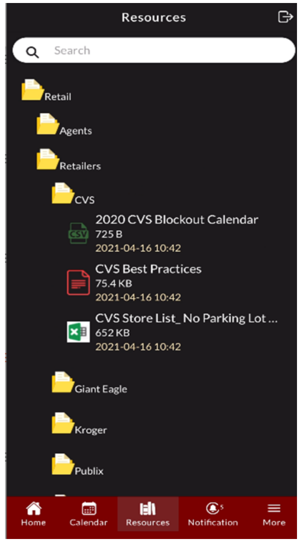
In the Retail Resource folder, you can find:

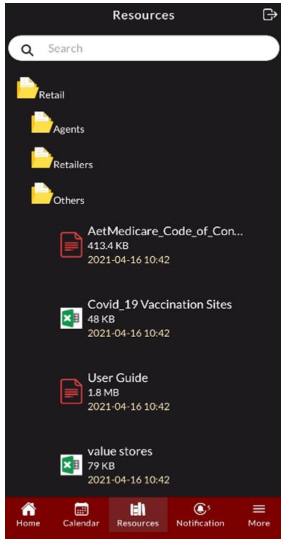
- Event Verification Forms
- Lead Template
- Retail Blackout Calendars
- Best Practices
- User Guide



Double click to open the folder.







HRA

Think Agent™

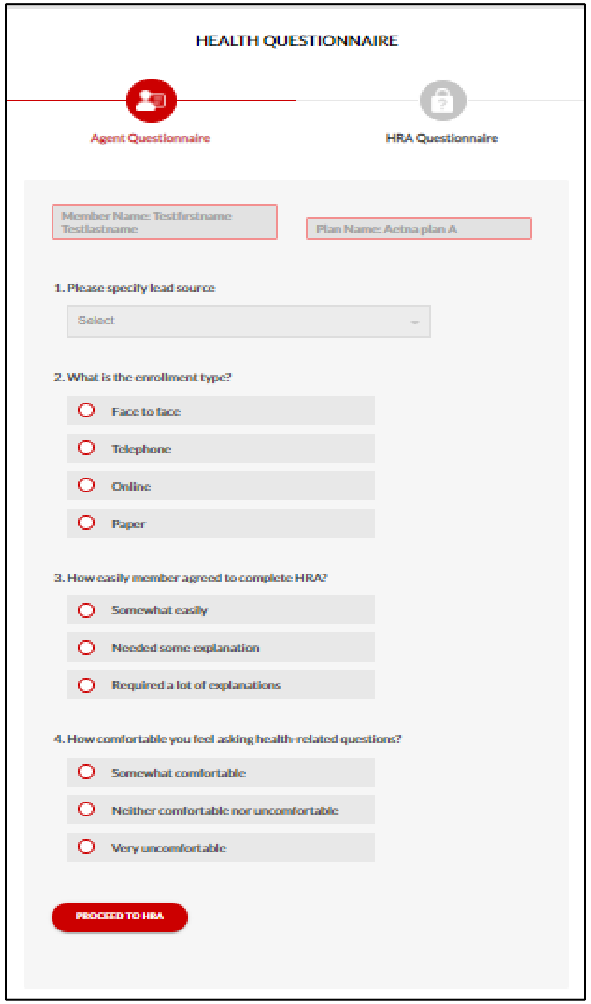
HRA – Health Risk Assessment

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.

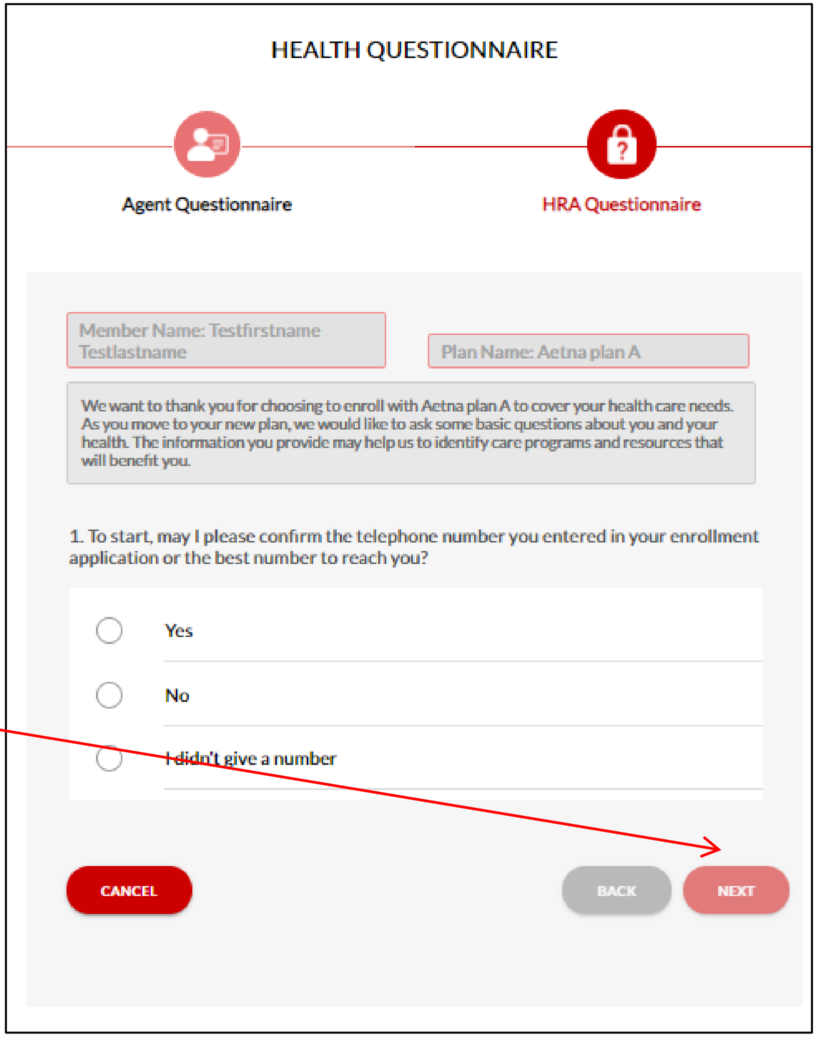
HRA – Health Risk Assessment



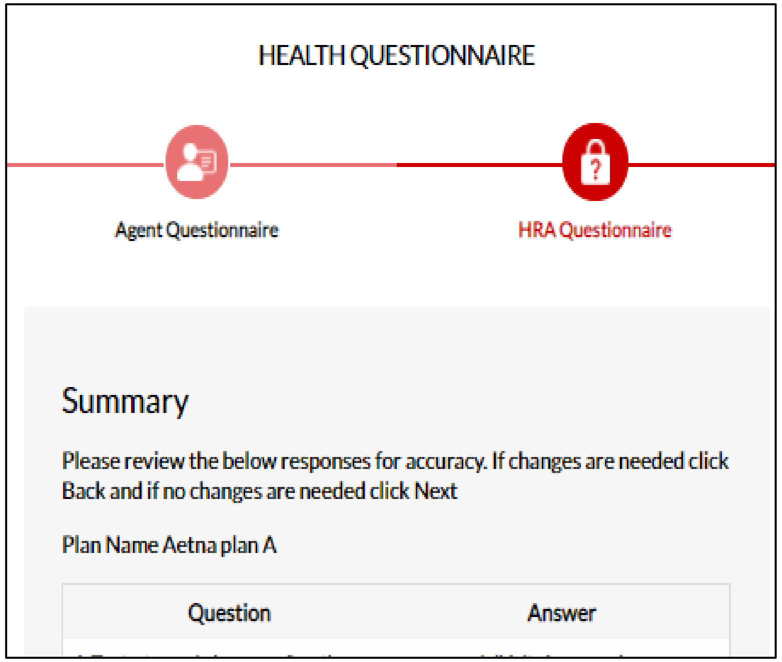
First, agents will complete a simple agent level questionnaire.

Next, they will begin the HRA.

Advance to the next screen by clicking Next.

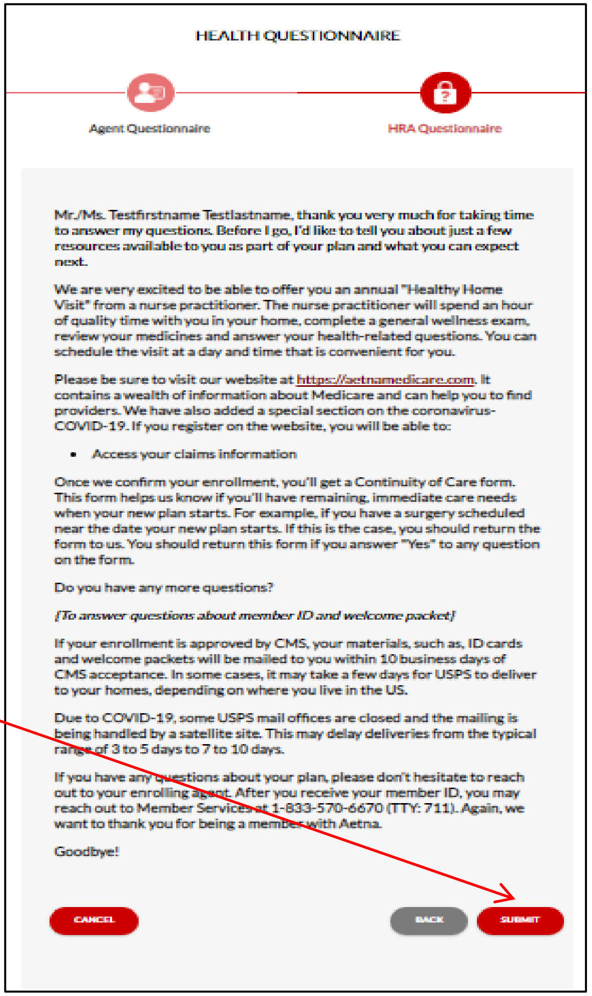


HRA – Health Risk Assessment



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**.



aetna

Permission to Contact

Think Agent™

Coming Soon!

Resources

Think Agent™

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
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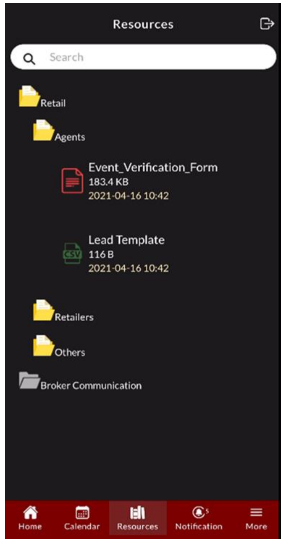

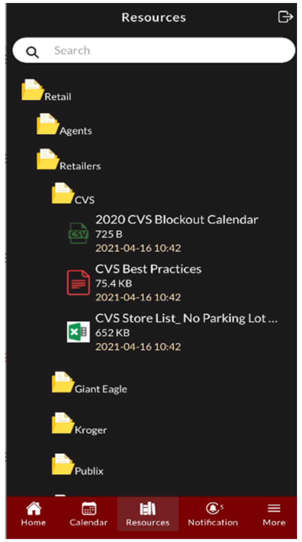

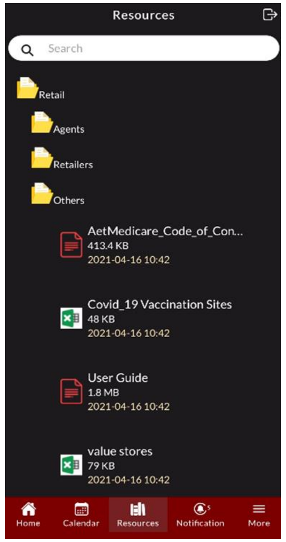

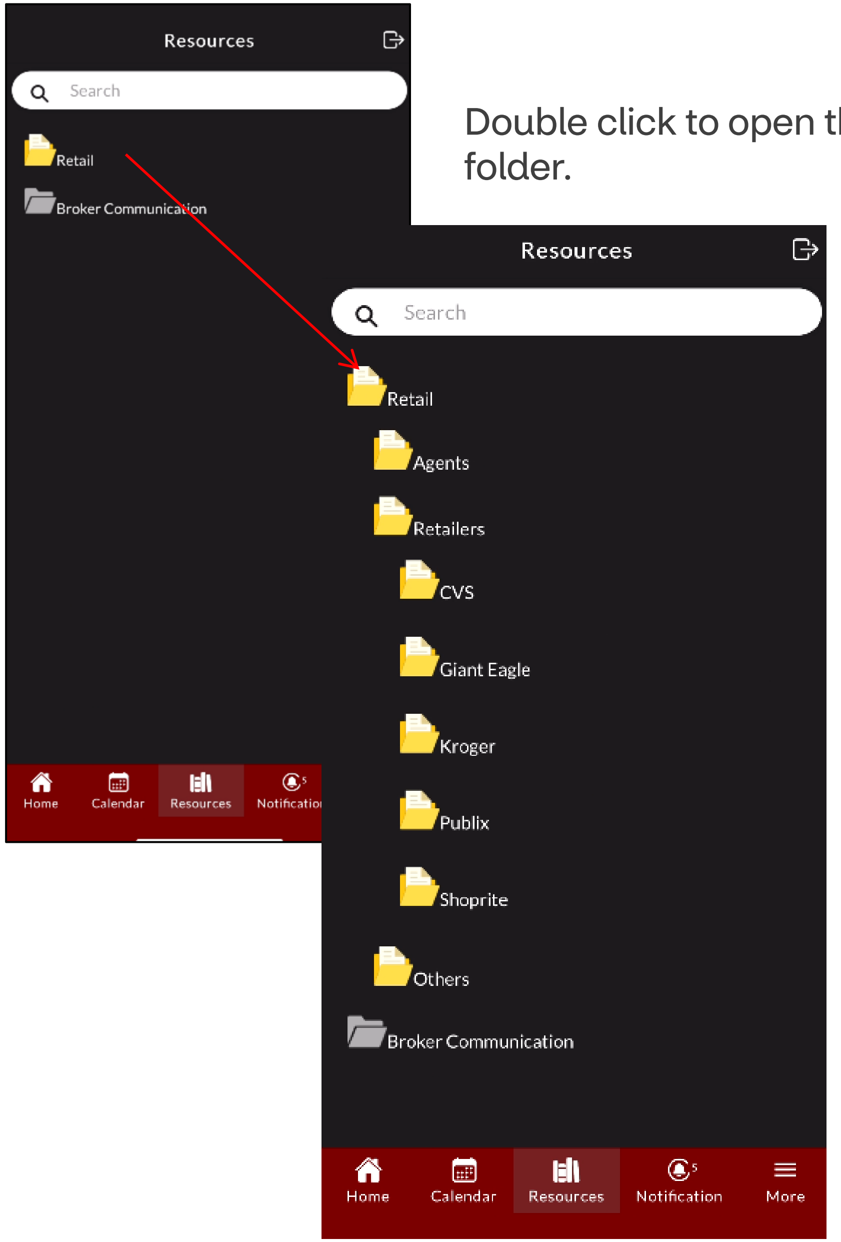

Double click to open the folder.

