Aetna Quote and Enroll

To launch the tool

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



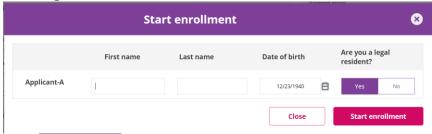
2. Application will launch in a new window.

New eApp

- 1. From the landing page of the eApp, you can
 - a. Quote and start enrollment
 - b. Send eKits
- 2. Quote
 - a. Select the state, enter zip code, date of birth, gender and tobacco indicator Start quote
 - You can enter Applicant A and Applicant B details together if there are 2 applicants
 - b. You will be able to select products available in the selected state.
 - c. Select the product and update the inputs for the quote and click on "Re-quote" Re-Quote
 - d. After the rates are displayed, select the required plan / rider and click on "Add to cart". Add to cart
 - e. This will add the product details to the shopping cart.
 - 3. Save Quote or Start enrollment
 - a. To save quote for future use, click on "save"
 - b. To start enrollment, click on "Start enrollment" Start enrollment

4. Enrollment

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



i. Plan eligibility

- 1. Qualifies the applicant based on eligibility questions.
- 2. Check eligibility Validates type of application open enrollment, guarantee issued, underwriting based on eligibility answers.
- 3. Health questions if applicant is Underwritten or the product requires health questions.
- ii. W Health History Health history
 - 1. Enter physician details, prescription details of the applicant
 - 2. Add more click on "add more" to add more prescription information
- iii. Benefits Benefits and plan
 - 1. Confirm the house discount question
 - 2. Confirm the effective date and plan selection
 - 3. Requote if effective date or plan benefits are changed, requote the application
- iv. Proposed insured Insured
 - 1. Name, date of birth, gender, state, zip code, tobacco are prefilled based on quote and start enrollment.
 - 2. Enter address, phone, email, ssn.
- v. Payment Information
 - 1. Allows ACH draft or Direct Bill.
 - 2. You can enter the bank details only once for any number of products (if the same account is used for multiple products)
- vi. Agent information
 - 1. Validate the agent information, update if there are split commissions.
 - 2. Select the Policy delivery option
 - a. Agent or applicant
 - b. NOTE: If applicant, system will allow for Security signature option.
- vii. Review & Signature Review and signature
 - 1. Summary of all the products selected.
 - 2. To edit the information click on the "pencil" next to the data category.
- b. Signature process
 - In person signature

- 1. Allows to sign the app if the applicant is available "in person" with the broker.
- ii. Voice signature
 - 1. Allows to update Voice signature if using the Aetna automated or point of sale telephone line. Using the Voice signature authentication code
- iii. Security question signature
 - 1. Allows to sign by answering the security question