

# You can now complete and submit electronic applications for ALL products with ONE tool -

# **Aetna Quote & Enroll**

Common information and input required just once then shared across multiple product applications for a true cross-selling experience.

The following senior supplemental products\* are available on Aetna Quote & Enroll, our online application tool:

- Medicare Supplement
- Final Expense
- Protection Series<sup>SM</sup>
- ° Cancer and Heart Attack or Stroke
- ° Dental, Vision and Hearing
- ° Home Care Plus
- ° Hospital Indemnity/Flex
- ° Recovery Care

One login – from aetnaseniorproducts.com to the tool

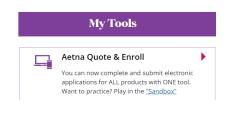
**Shopping cart** – price the products and add to cart to start enrollment **Product specific guidance** – You will see the specific sections based on the product selected for applicant(s).

**Multiple secure signature options** – with only one signature required per applicant, no matter how many product applications

**In-good-order applications** – key information (accurate data) required in each step results in smooth processing

**One submission** – for multiple product applications / applicant(s), application processing starts immediately on submission

**Rapid visibility to submitted applications** – Use the "enrollment tracker" report on the broker side to view the app status. Report should be updated within 30 minutes





**View products** 

Quote

Add to cart

**Start enrollment** 



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

Application will launch in a new window.

From the landing page of the eApp, you can -

- Quote
- Start enrollment
- Send eKits
- Mange your cases

#### **Rate Quote**

Enter zip code, state will be auto populated, enter date of birth, select Gender and tobacco indicator Click on **View Products** 

You can enter Applicant A and Applicant B details together if there are 2 applicants

- You will be able to select products available in the selected state.
- Select the product and update the inputs for the quote and click on "Quote"
- After the rates are displayed, select the required plan / rider and click on "Add to cart".

Save Quote or Start enrollment

- To save quote for future use, click on "save"
- To start enrollment, click on "Start enrollment" Enrollment process starts with providing Applicant Name, Date of birth and Legal resident details.

#### Plan eligibility

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

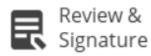














#### **Health history**

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

### Benefits and plan

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

# **Proposed insured**

 Name, date of birth, gender, state, zip code, tobacco are prefilled based on quote and start enrollment. Enter address, phone, email, ssn.

#### **Payment information**

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

#### **Agent information**

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

#### **Review and signature**

- Summary of all the products selected.
- To edit the information, click on the "pencil" next to the data category.

#### Signature process

#### In person signature

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

# Security question signature

• Allows to sign by answering the security question

<sup>\*</sup> Additional signature methods are available based on product rules and business rules.