



Sales & Enrollment

Medicare Supplements &
Complementary Plans

Table of Contents

This guide will cover each of the below topics:

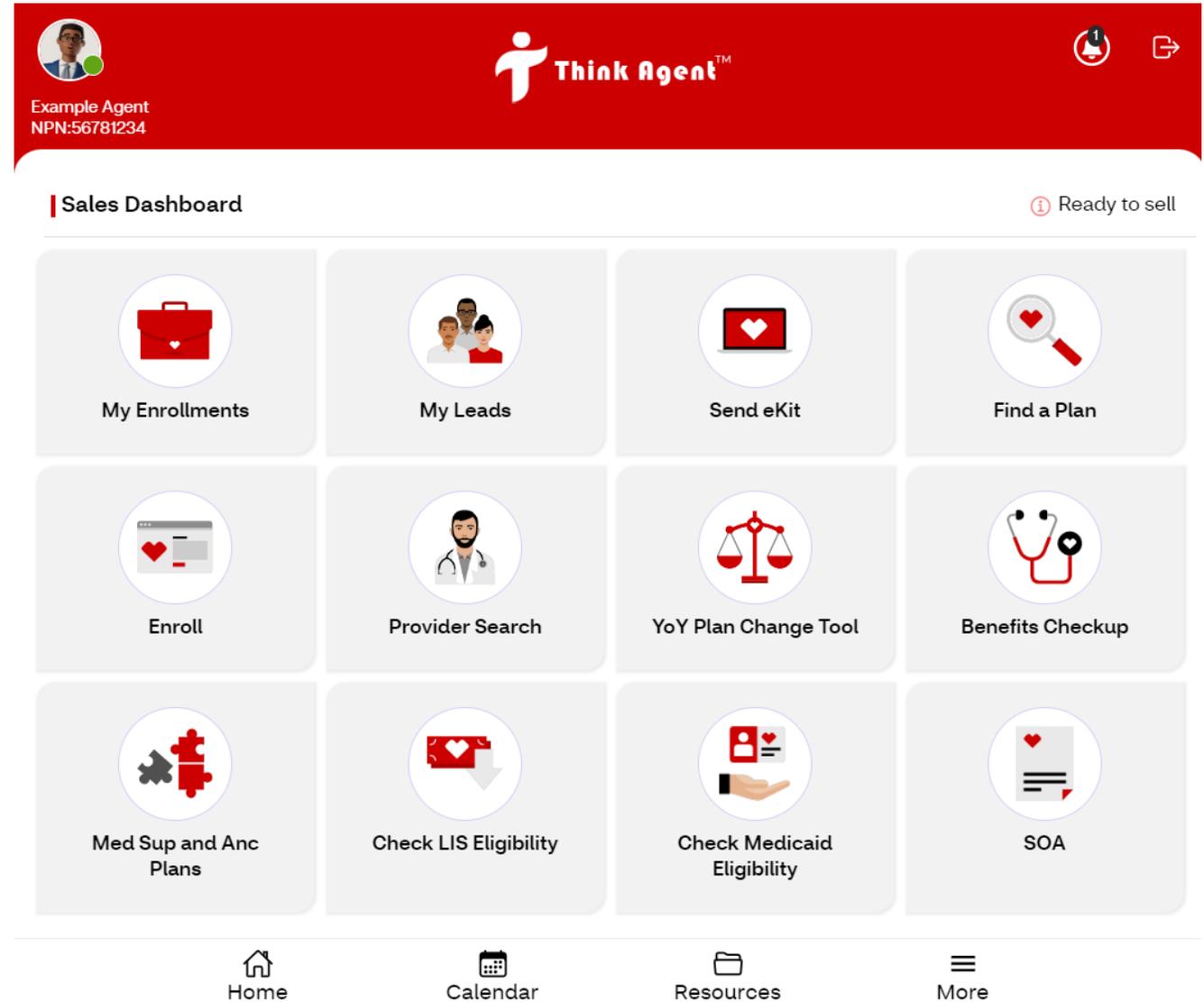
- ❖ Sales Dashboard – **3**
- ❖ Checking Ready-to-sell (RTS) Status – **4**
- ❖ **My Leads – 5 – 13**
 - Creating A New lead – **5 - 7**
 - Find Your Leads – **8**
 - Adding Lead Notes – **9**
 - Adding A Pharmacy – **10**
 - Adding Prescriptions – **11 - 13**
- ❖ **eKits – 14 - 17**
- ❖ **SOAs – 18**
- ❖ **Selecting A Plan – 19 – 24**
 - SSI Company Preferences - **20**
 - Medicare Supplement – **21**
 - Complementary Plans – **22**
 - Product Portfolio – **23**
 - Comparing Plans – **24**
- ❖ **Enrollment – 25 – 32**
 - Application Segments – **26 - 29**
 - Sign & Submit – **30**
 - Send For eSignature – **31**
 - Enrollment Confirmation – **32**
- ❖ **My Enrollments – 33 - 36**

Sales Dashboard

After logging in to Think Agent on your desktop or mobile device, click the “**Sales**” icon.

Within this component you can access each of the below features:

- My Enrollments
- My Leads
- Send eKit or SOA
- Find a Plan
- Enroll
- Provider Search
- YoY Plan Change Tool
- Benefits Checkup
- Check Eligibility – Medicaid and/or LIS



Checking Ready-to-sell Status

Click the “**Ready to sell**” information icon on the top right of your Sales Dashboard to see your current RTS status for Medicare Supplement & Complementary products.

The table (right) will show the:

- Plan year(s) you are RTS
- Each state you are RTS
- Each product you are RTS

Company Name	Ready to sell state MEDSUP	Ready to sell state ANC
American Continental Insurance Company [GNW0009894]	AL,AR,AZ,FL,GA,IA,IN,MI,MO,MS,MT,ND,NM,SD,UT,VA,WI,WV,WY	
Aetna Health and Life Insurance Company [GNW0009894]	AL,AR,AZ,FL,ID,IN,KY,LA,MO,MS,MT,NH,NV,TN,TX,UT,VA,WI	
Continental Life Insurance Company of Brentwood, Tennessee [GNW0009894]	AL,AZ,CA,CO,CT,DE,FL,GA,ID,IL,IN,KS,KY,MD,MI,MN,MO,MS,MT,NC,NE,NH,NJ,NM,NV,OH,OR,PA,RI,SC,SD,TN,TX,UT,VA,VT,WA,WI,WV,WY	AL,AR,AZ,CA,CO,CT,DE,FL,GA,IA,ID,IL,IN,KS,KY,LA,MD,MI,MN,MO,MS,MT,NC,ND,NE,NH,NJ,NM,NV,OH,OK,OR,PA,RI,SC,SD,TN,TX,UT,VA,VT,WA,WI,WV,WY
Accendo Insurance Company [GNW0009894]	AL,AR,AZ,CA,CO,CT,DE,FL,GA,IA,ID,IL,IN,KS,KY,MD,MI,MO,MS,MT,NC,ND,NE,NH,NJ,NM,NV,OH,OK,OR,PA,RI,SC,SD,TN,TX,UT,VT,WI,WV	
Aetna Health Insurance Company [GNW0009894]	AR,CO,DE,GA,IA,IL,IN,KS,LA,MD,MI,NC,NJ,OH,OK,PA,SC,TN,TX,VA	

OK

When **not** RTS, and creating a lead, you will see the below message:

Oops! It looks like you are not ready to sell in this geography. Please contact our Broker Services Department for more information. BrokerSupport@aetna.com 866-714-9301

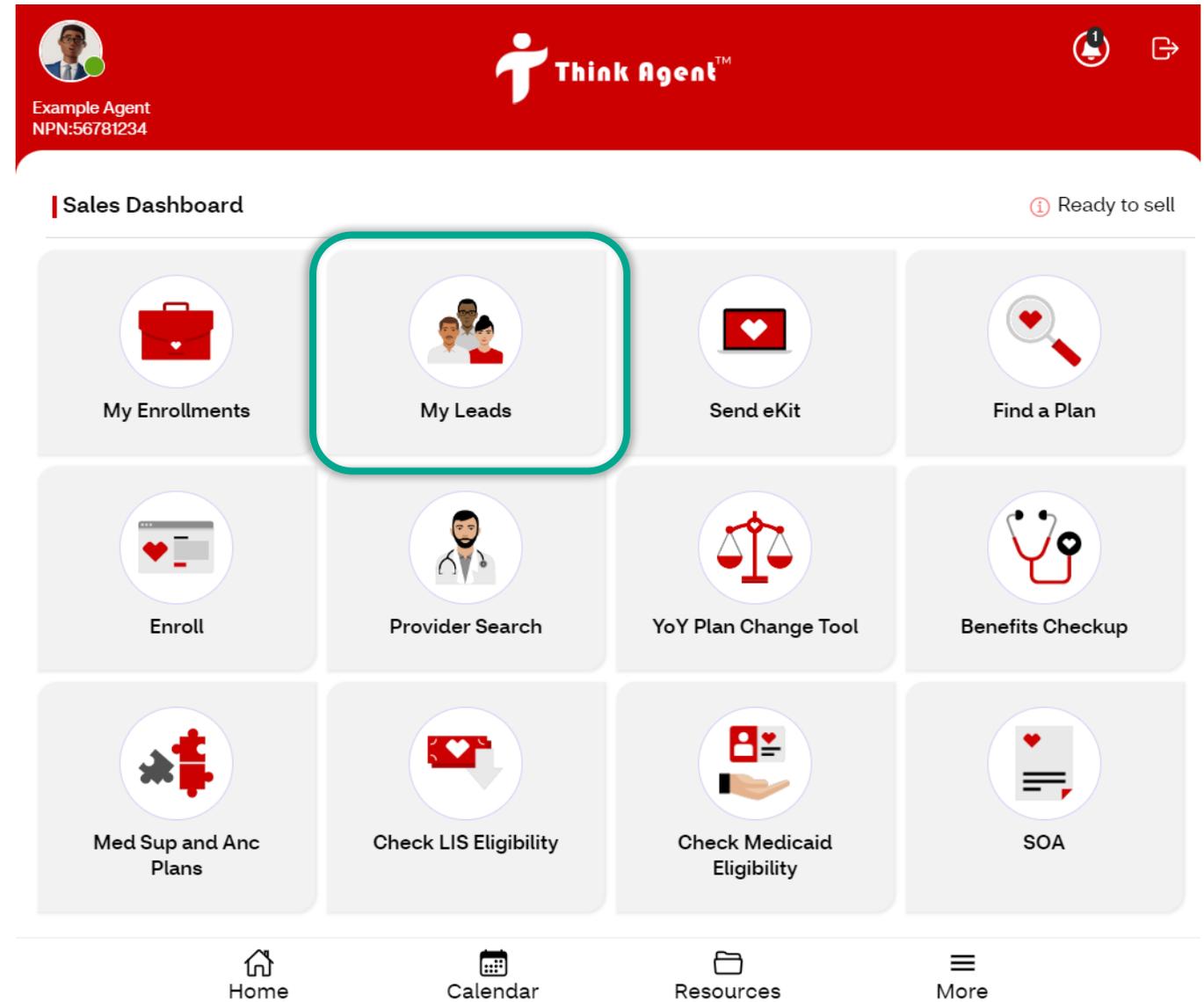
Note: You will only be allowed to create leads and submit enrollments for states and products for which you are RTS.

Creating A New Lead

The Sales component is lead-based. Meaning, best-practice is to **first create a lead** before using the other Sales & enrollment features.

To create a new lead, click the “**My Leads**” icon, then click the red “” icon in the lower right corner.

Hint: Basic lead information such as name, zip code, address, etc. will pre-populate in forms such as eKits, SOAs and enrollment applications later-on – Saving you time!



Creating A New Lead

Only certain fields in a lead are required to create a new lead.

Completing *all* of the available lead fields is best-practice.

Required fields are indicated by the red asterisk next to each:

- First & Last Name
- Date of Birth (DOB) & Gender
- Zip Code
 - *State
 - *County
 - *City

**Required. Based on zip code.*

The screenshot shows the 'Add Lead' form with the following sections and fields:

- Member Information:**
 - First Name* (required)
 - Last Name* (required)
 - Date of Birth* (required, with calendar icon)
 - Gender* (required, dropdown)
 - Address1
 - Address2
 - ZIP Code* (required)
 - State* (required, dropdown)
 - County* (required, dropdown)
 - City* (required)
 - Email
 - Phone
 - Ethnicity (dropdown)
 - Race (dropdown)
- Insurance Information:**
 - Medicare Number
 - Medicaid Number
 - Part A Effective Date (with calendar icon)
 - Part B Effective Date (with calendar icon)
- Lead Details:**
 - Lead Source (dropdown)
 - Lead Status (dropdown, currently set to 'New')
 - Permission To Contact (dropdown)
 - Existing Aetna Member (Yes/No buttons)
 - Tobacco in the past 12 months (Yes/No buttons, with info icon)

At the bottom of the form, there are two buttons: a red 'SAVE' button and a grey 'CANCEL' button.

Creating A New Lead

Other **not-required lead fields**, such as Medicare number, Part A and B effective date, phone and email will serve you when completing eKits, SOAs, or enrollment applications later!

Note: Generally, they will pre-populate forms, saving you time entering info. again.

When you are finished, click **“Save”** in the lower right corner to save your lead.

Hint: Part A & B dates will auto-fill if you enter a valid Medicare Number – Neat!

Add Lead

Member Information

First Name* Last Name* Date of Birth *

Gender* Address1 Address2

ZIP Code* State* County*

City* Email

Phone Ethnicity Race

Insurance Information

Medicare Number Medicaid Number Part A Effective Date Part B Effective Date

Lead Details

Lead Source Lead Status: New Permission To Contact

Existing Aetna Member: Yes No

Tobacco in the past 12 months *ⓘ: Yes No

SAVE **CANCEL**

Finding Your Leads

Once you have saved a newly-created lead, it will show in your “**New Leads**” tab as well your “**All Leads**” tab.

Your leads are safe with you! Aetna does not view, delete or edit your leads without your permission.

Note: When your lead count gets large, use the Sort, Search and Filter options to quickly locate the person you’re looking for!

Add as many leads as you like! The **Status** column is particularly helpful to remind you of your last sales activity.

Name	State	ZIP Code	Status	Created Date	Updated Date
TATEST TATEST	KY	40222	eKit Sent	03/10/2023	03/21/2023
TATEST TATEST	KY	40222	Application Saved	03/07/2023	03/17/2023
TATEST TATEST	MI	48002	New	03/07/2023	03/07/2023
TATEST TATEST	KY	40004	New	03/03/2023	03/03/2023
TATEST TATEST	KY	40004	New	03/03/2023	03/03/2023
TATEST TATEST	KY	40004	New	03/03/2023	03/03/2023
TATEST TATEST	KY	40222	New	03/03/2023	03/03/2023
TATEST TATEST	SD	57701	New	03/02/2023	03/02/2023
TATEST TATEST	NY	10001	Application Submitted	02/14/2023	02/27/2023
TATEST TATEST	TN	37041	Application Submitted	02/13/2023	02/14/2023

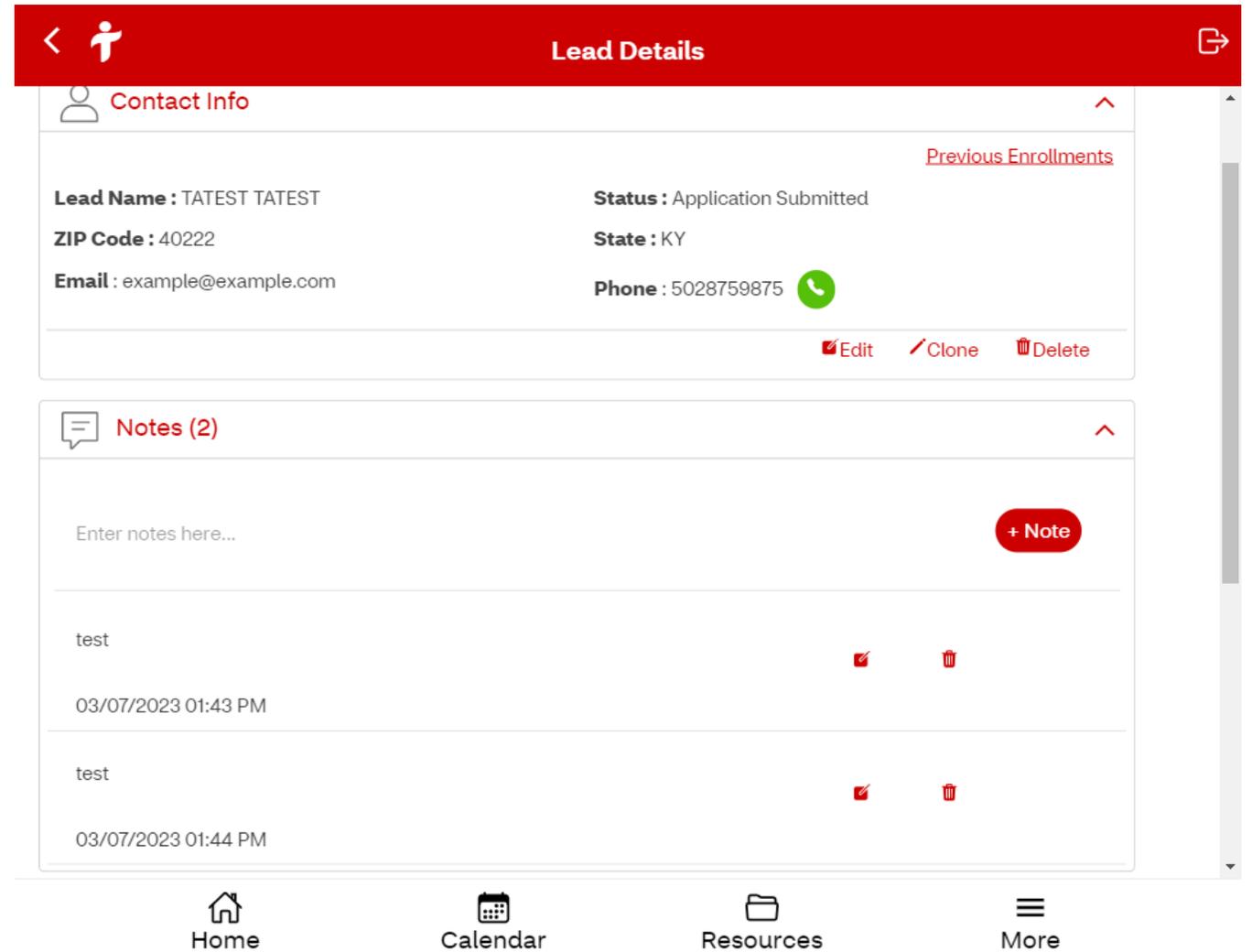
Adding Lead Notes

Creating & adding lead Notes is a great way to store facts & information about this lead securely, to reference at a later time.

To create a note, type in the Notes field, then click “” to save.

Each Note created is **date & time stamped** and can be edited or deleted at any time from this lead.

There is a **character limit** per note of 100-characters, so keep it brief!



Adding A Pharmacy

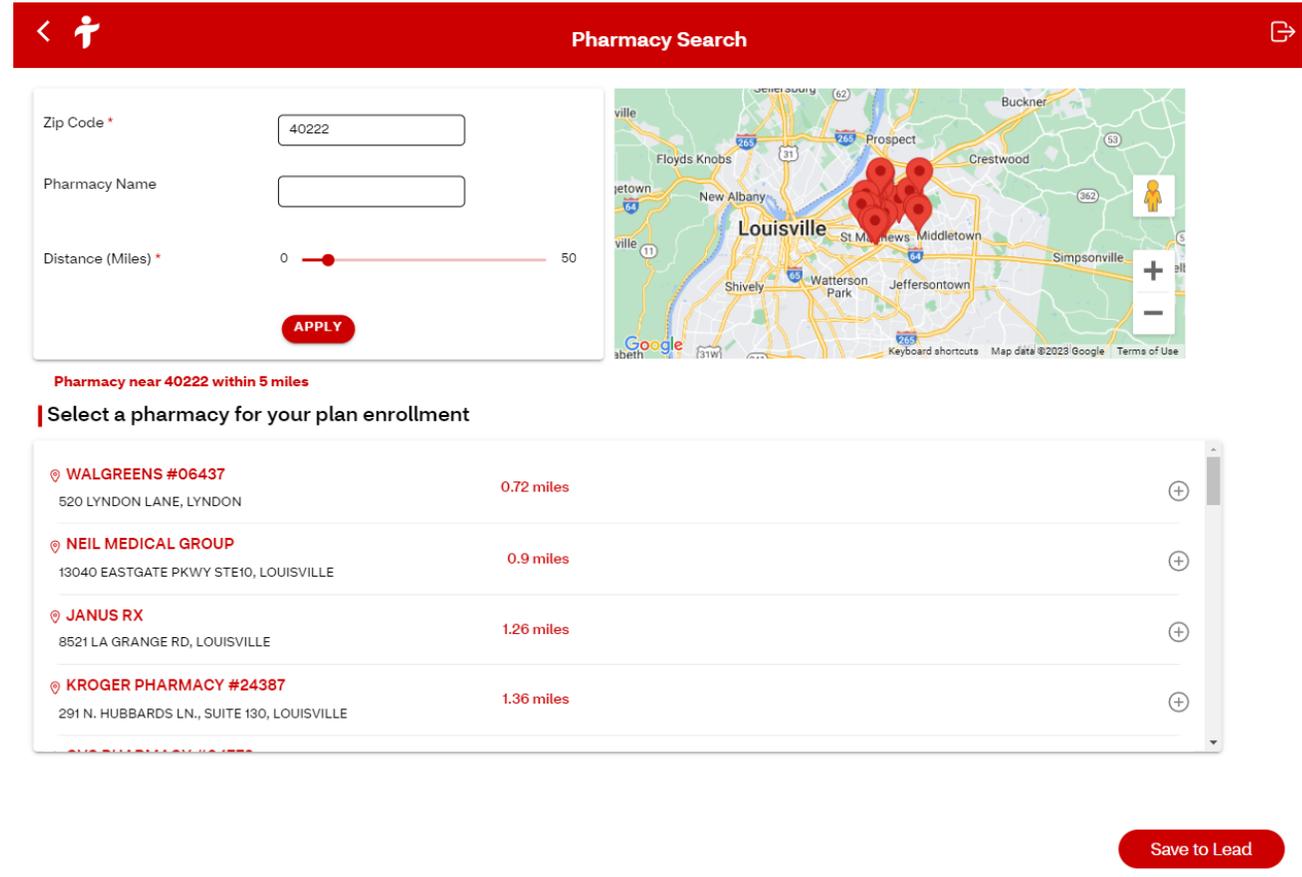
One pharmacy can be added per lead.

This should be the lead's preferred pharmacy to receive and refill prescriptions.

To add a pharmacy, click the drop-down arrow next to **"Pharmacy"** then **"Add Pharmacy"**

The lead's zip code will pre-populate in the required **"Zip Code"** field and the distance from this zip code defaults to a 5-mile radius.

Expand or narrow the distance, click the **"plus"** icon next to the desired pharmacy, then click **"Save To Lead"**



Hint: Pharmacy is used to estimate drug cost. You will only see network status –Preferred, In-Network, or Out-of-network - displayed when later selecting a plan MAPD or PDP option.

Adding Prescriptions

Add as many drugs to your lead as needed.

To add drugs to a lead, click the drop-down arrow next to “**Drugs**” then click “**Add Drugs**”

- You must choose the dosage & form, quantity & frequency of each drug added.
- If a generic version of this drug exists, you will be prompted to choose “Yes” or “No” to the generic alternative option.

Continue to add & edit this drugs list as needed. When finished, click “**Save To Lead**” to save these selections to your Lead, and return to the Lead Details screen.

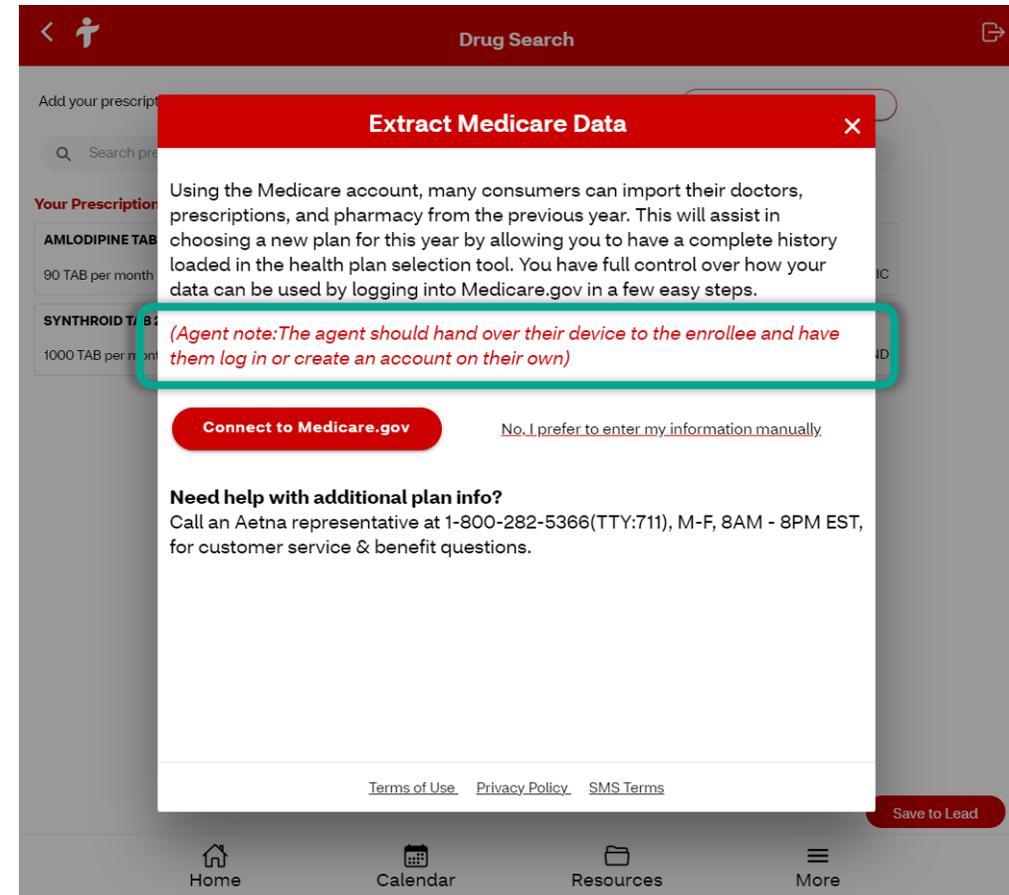
Note: Think Agent will not allow the same drug to be added more than once; so, if you cannot recall – Try adding the drug! If it’s already been added to this lead, you’ll see an error message to remind you.

Adding Prescriptions – “Blue Button”

When adding drugs to your lead, there is an option to **“Add Drugs Via Medicare Account”** in the upper right corner.

When selected, this option will direct to the CMS site to login or create a CMS account. Once on the CMS site - If the client agrees to proceed – the agent should **allow the client privacy on your device to create their secure CMS account and/or login.**

Once completed by the client, they will have the option to import their prescription drug history to Think Agent, auto-filling their prescriptions & drug details only, without the need of manually adding each.



Note: Login to the Medicare.gov portal must be completed by the client privately, away from the agent’s view. Account creation generally only takes a few minutes to complete!

Adding Prescriptions – “Knockout Drugs”

During a Medicare Supplement or Complementary plan enrollment, there is an area to enter the name(s) of prescribed medications and diagnosis/ reason for taking.

Medications entered in this segment of the enrollment application will be used by Underwriting to determine **plan eligibility** after the enrollment is submitted.

Certain prescriptions deemed “**knockout drugs**” may disqualify an applicant by UW.

Note: “Knockout drugs” vary by plan selection and are determined by the plan. Entering medications – Even if “knockout” – will not stop you from submitting the app.

The screenshot shows the 'Enrollment' process for Medicare Supplement Plan B. The progress bar indicates that 'Plan Eligibility' and 'Health Information' are completed, while 'Payment Information' and 'Review & Signature' are pending. The applicant's name is TATEST TATEST and the monthly premium is \$158.60. The 'Health History' section is highlighted with a green border and contains two rows for entering 'Prescribed Medications' and 'Reason for Medications (diagnosis)'. Below this is the 'Physician Information' section with fields for 'Your primary physician', 'Physician's office name', and 'Phone'. Navigation buttons for 'Back', 'Save As Draft', and 'Next' are visible at the bottom.

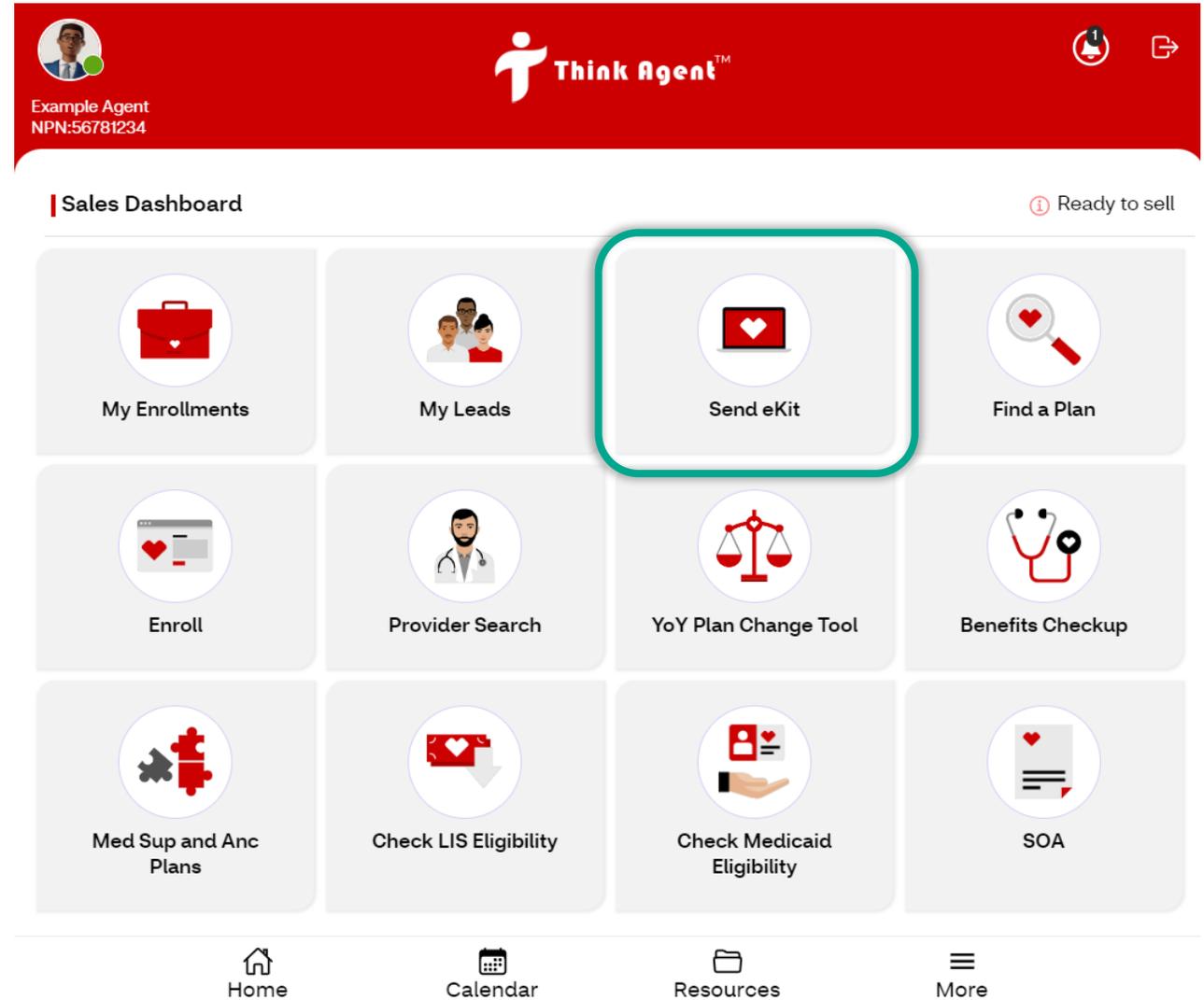
Creating & Sending An eKit

You can create & send an eKit **two ways**:

- While viewing a particular lead's details, click “ **Add eKit** ” under the “**eKit**” drop-down.
- Or, by clicking the “**eKit**” icon from the Sales Dashboard menu (shown right) and choosing an existing lead you previously created.

After doing one or the other, you will be prompted to select a plan year, then find a plan to send to your lead via email.

Your client must receive, complete, sign & submit the enrollment from their email. Once they have finished, the eKit will appear in your **My Enrollments** (see page 33) for the agent (you) to apply their signature & submit for processing.



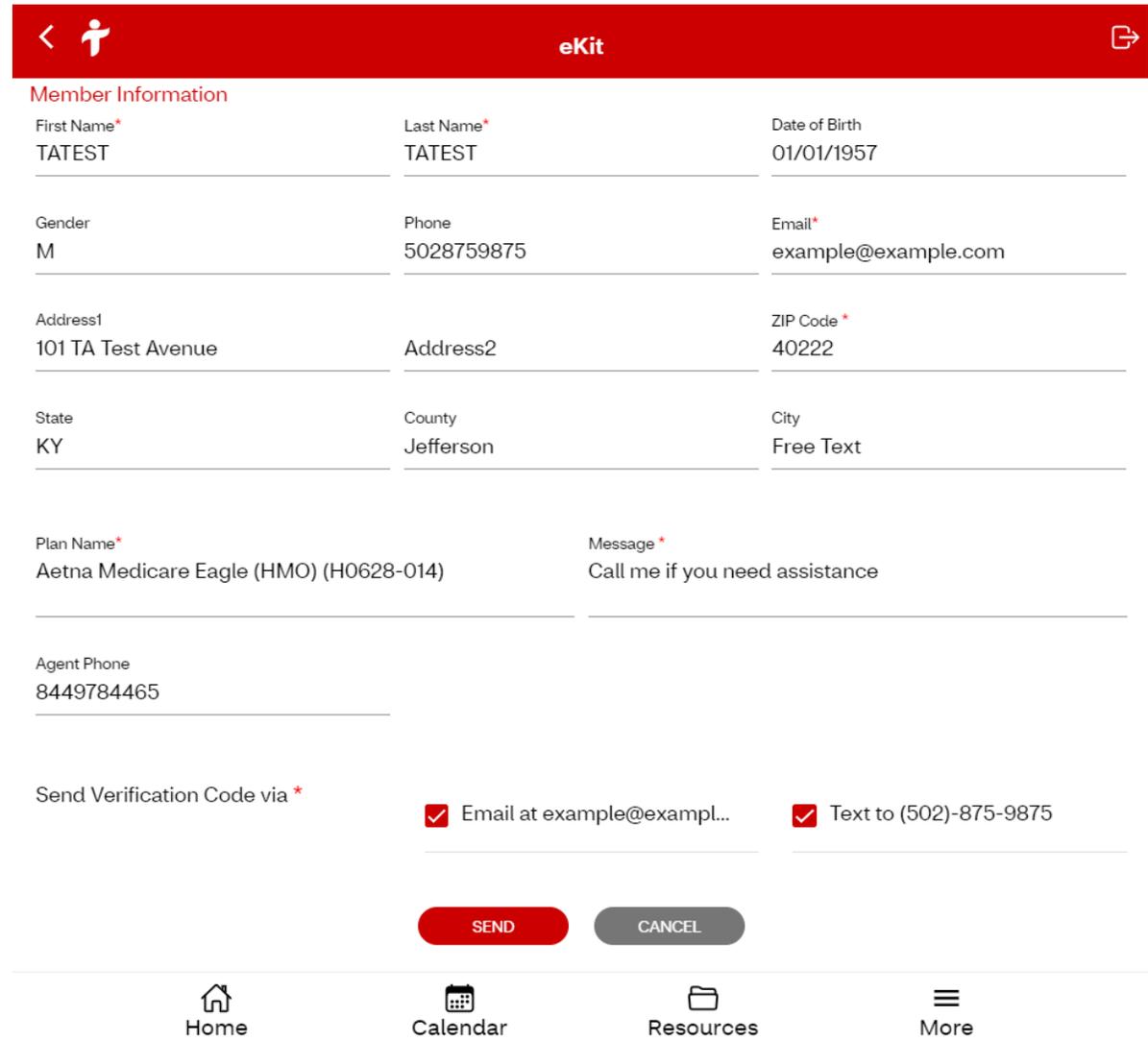
Creating & Sending An eKit

Choose a plan from the available options, then click “  “

The eKit form is largely pre-populated with the information you entered in the lead.

To finish the eKit, enter a **Message** ex. *Call me if you need assistance*, your phone number, and choose one or both options to send the **Verification Code** to the customer via Email or Text (or both).

Note: The unique Verification Code must be copied/ entered by the client (from their email or text) and applied to the eKit to open its secure link.



The screenshot shows a mobile application interface for creating and sending an eKit. At the top is a red header with a back arrow, a person icon, the text "eKit", and a share icon. Below the header is the "Member Information" section, which is a form with the following fields and values:

First Name*	Last Name*	Date of Birth
TATEST	TATEST	01/01/1957
Gender	Phone	Email*
M	5028759875	example@example.com
Address1	Address2	ZIP Code*
101 TA Test Avenue		40222
State	County	City
KY	Jefferson	Free Text
Plan Name*	Message*	
Aetna Medicare Eagle (HMO) (H0628-014)	Call me if you need assistance	
Agent Phone		
8449784465		
Send Verification Code via *	<input checked="" type="checkbox"/> Email at example@exampl...	<input checked="" type="checkbox"/> Text to (502)-875-9875

At the bottom of the form are two buttons: "SEND" (red) and "CANCEL" (grey). Below the form is a navigation bar with four icons: Home, Calendar, Resources, and More.

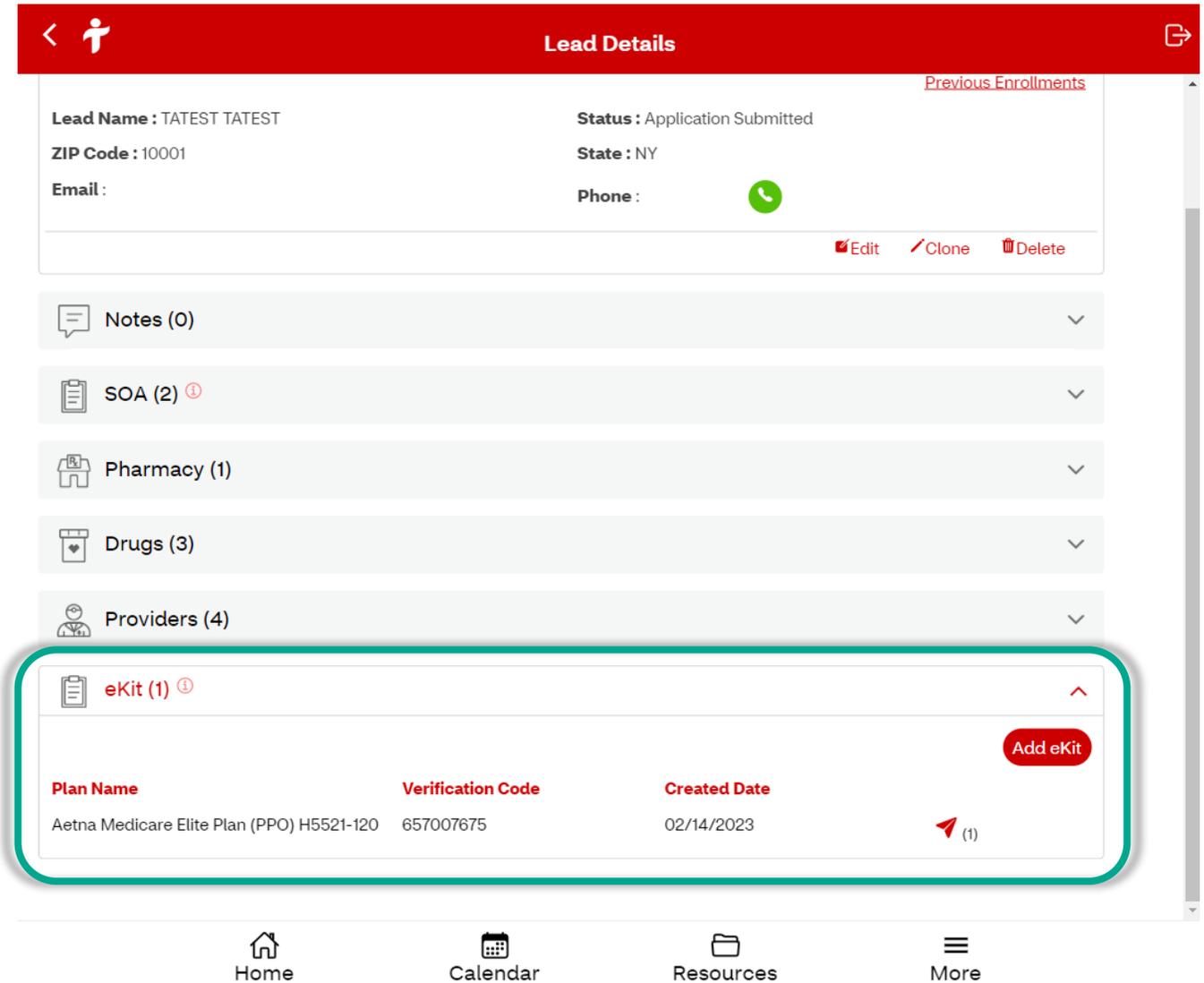
Creating & Sending An eKit

Once the **eKit has been sent**, you will be re-directed back to the lead.

If the client cannot locate their eKit or Verification Code, no problem!

Resend an eKit (click the “” icon to the right) or create a new eKit from your lead. Consider an alternate client email or meeting face-to-face if still having trouble.

Note: If the client enrolls via the eKit, you will be notified in Think Agent “Notifications” and sent an email directing you to My Enrollments



Lead Details

Lead Name : TATEST TATEST Status : Application Submitted
ZIP Code : 10001 State : NY
Email : Phone : 

[Previous Enrollments](#)

[Edit](#) [Clone](#) [Delete](#)

Notes (0) 

SOA (2) 

Pharmacy (1) 

Drugs (3) 

Providers (4) 

eKit (1) 

[Add eKit](#)

Plan Name	Verification Code	Created Date	
Aetna Medicare Elite Plan (PPO) H5521-120	657007675	02/14/2023	 (1)

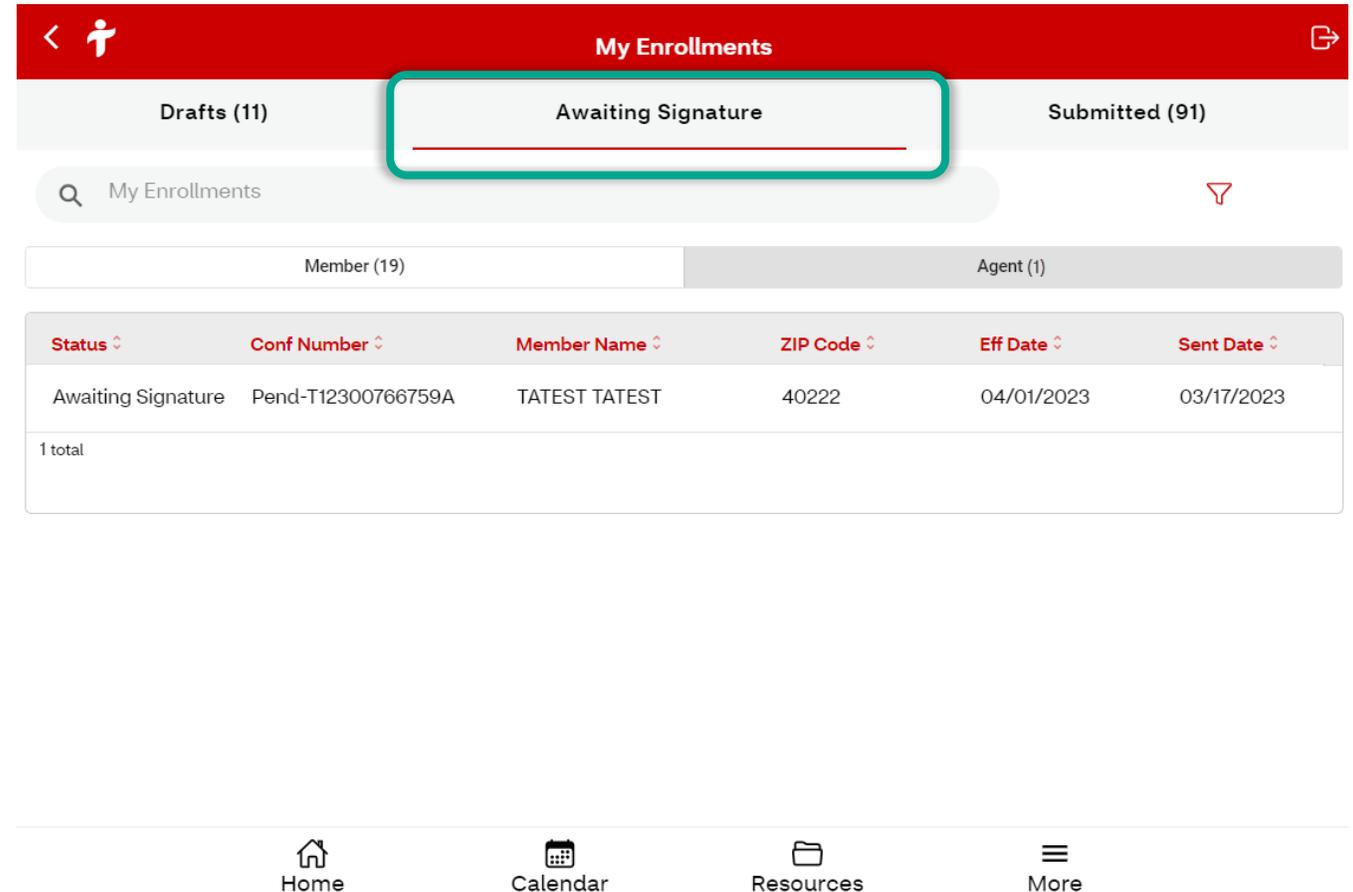
Home Calendar Resources More

Signing & Submitting The eKit

Med. Supp. & Complimentary Plan eKits require an extra step. Once the client signs, the agent must locate this enrollment in **My Enrollments**.

Under **Awaiting Signature**, locate the “Agent” sub-tab (image right), open this enrollment, review, **apply your signature**, and submit to Aetna.

Until the agent has signed, this eKit enrollment is not submitted; so, it is **very important** to check in My Enrollments for any applications **pending agent signature**.



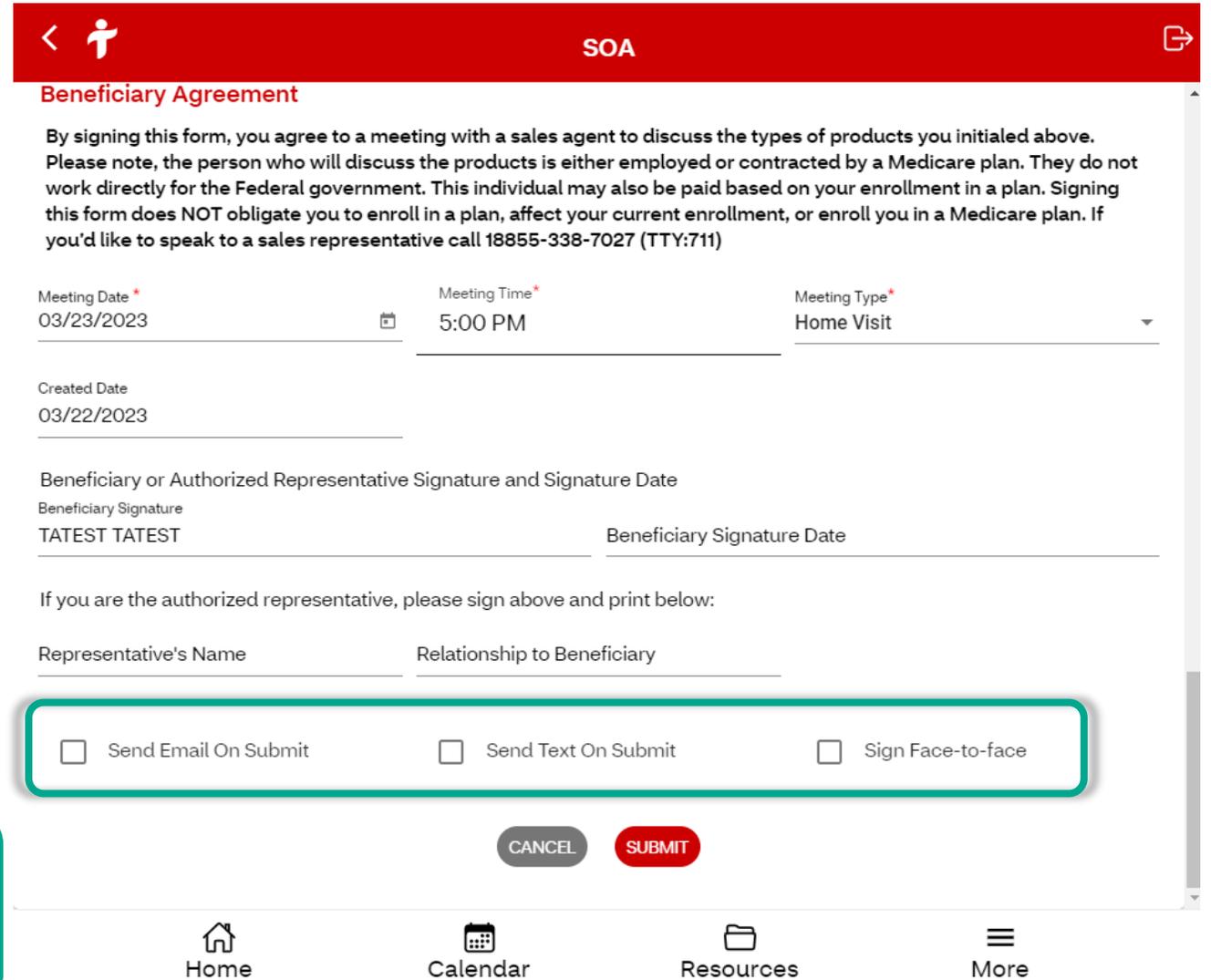
Creating & Sending A SOA

To send a SOA from Think Agent, find “SOA” on the **Sales Dashboard**, or “**Create SOA**” in your client lead.

Complete all required fields, then choose to **send** – Via text and/or email – or **sign face-to-face**.

If sent – Not signed face-to-face – You may **resend** this SOA from your lead by clicking the “  (1) ” icon.

Note: It is best practice to obtain a signed SOA before discussing any Medicare products with your prospect or authorized representative.



SOA

Beneficiary Agreement

By signing this form, you agree to a meeting with a sales agent to discuss the types of products you initialed above. Please note, the person who will discuss the products is either employed or contracted by a Medicare plan. They do not work directly for the Federal government. This individual may also be paid based on your enrollment in a plan. Signing this form does NOT obligate you to enroll in a plan, affect your current enrollment, or enroll you in a Medicare plan. If you'd like to speak to a sales representative call 18855-338-7027 (TTY:711)

Meeting Date* 03/23/2023 Meeting Time* 5:00 PM Meeting Type* Home Visit

Created Date 03/22/2023

Beneficiary or Authorized Representative Signature and Signature Date

Beneficiary Signature TATEST TATEST Beneficiary Signature Date

If you are the authorized representative, please sign above and print below:

Representative's Name Relationship to Beneficiary

Send Email On Submit Send Text On Submit Sign Face-to-face

CANCEL **SUBMIT**

Home Calendar Resources More

Selecting A Plan

After clicking “**Find Plan**” at the top right of a lead, you will be shown the Aetna plan options available by the lead’s geography.

Each available **plan type** (MA, PDP, Med Supp, and Complementary) is organized by tabs at the top of this screen.

Note: See our “*Sales & Enrollments – MA, MAPD, PDP, and D-SNP*” training guide to learn about selling these products in Think Agent.

Use the many page options – **Sort**, product **tabs**, product **filter** – to locate the best plan option for your lead.

The screenshot displays the 'Plans' selection interface. At the top, there are navigation icons and a search bar. Below the search bar, filters for ZIP Code (40222), County (Jefferson KY), and Year (2023) are visible. A 'Select a lead' button and an 'Add Preferences' button are also present. The main section features four tabs for plan types: Medicare Advantage Plans (4), Medicare Supplement Plans (10), Prescription Drug Plans (3), and Complementary Plans (9). The Medicare Supplement Plans tab is highlighted with a green border. Below the tabs, there are filters for 'Select Company Name' (Aetna Health and Life Insurance), 'Part A Date' (04/01/2023), 'Effective Date' (05/01/2023), and 'Payment Frequency' (Monthly). Two plan options are displayed: Plan A and Plan B, both from Aetna Health and Life Insurance Company. Each plan shows a Monthly Premium of \$0.00 and buttons for 'Calculate Premium', 'Add To Portfolio', and 'Enroll Now'. There are also options for Household Discount and Application Type (Underwritten, Open Enrollment, Guaranteed Issue).

SSI Company Preferences

If you are ready-to-sell (RTS) for SSI products, under the “**More**” tile on your Think Agent homepage, you will see the “**SSI Company Preferences**” tile option.

This option allows you to organize the **display order for each SSI company** when searching for SSI plans from your Think Agent account, and when prospective clients use your PURL to shop for plans.

Note: To learn more about your Personalized URL (PURL) accessible in Think Agent, see our [“Profile & PURL”](#) video in our Resources folders.



Choose your company preference

Brand Priority 1*
Aetna Health Insurance Company

Brand Priority 2*
Aetna Health and Life Insurance Company

Brand Priority 3*
American Continental Insurance Company

Brand Priority 4*
Continental Life Insurance Company of Brentwood, Tennessee

Brand Priority 5*
Accendo Insurance Company

CANCEL SAVE

Selecting A Plan – Medicare Supplements

There are 5 components necessary to complete before moving to the enrollment for a Medicare Supplement:

- Part A Date – Cannot be blank
- Effective Date – Cannot be blank
- Household Discount* – “Yes” or “No”
- Application Type – 3 options: UW, OE, or GI
- Calculate Premium

***Qualification & availability may vary by state**

Once completed, you will have the option to “[Add To Portfolio](#)” or “[Enroll Now](#)”.

Note: Certain data entries can affect premium, including: Company, state, age, DOB, tobacco usage, effective date, and household discount.

Plans

ZIP Code 40222 County Jefferson KY Year 2023

Lead: TATEST TATEST Add Preferences

Medicare Advantage Plans(4) Medicare Supplement Plans(10) Prescription Drug Plans(3) Ancillary Plans

Select Company Name Part A Date * Effective Date * Payment Frequency

Accendo Insurance Company 05/01/2022 MM/DD/YYYY Monthly

Plan A Accendo Insurance Company Compare Plans

Monthly Premium \$0.00 Calculate Premium Add To Portfolio Enroll Now

Household Discount * Application Type *

Yes No Underwritten Open Enrollment Guaranteed Issue

Plan Benefits Plan Details

Plan F Accendo Insurance Company Compare Plans

Monthly Premium \$0.00 Calculate Premium Add To Portfolio Enroll Now

Household Discount * Application Type *

Selecting A Plan – Complementary Plans

Depending on the searched geography-
And your current RTS status - there may be many complementary plans to choose from in Think Agent.

Some of these products require you to **select an available plan**, while others allow you to **choose 1 or more optional benefit rider(s)** before proceeding.

Once completed, you will have the option to “ [Add To Portfolio](#) ” or “ [Enroll Now](#) ”.

Note: There are combinations of benefit riders not allowed, and SSI rules that may not allow enrollment to occur. If so, you will see a pop-up.

The screenshot displays the 'Plans' selection interface in Think Agent. At the top, there are search filters for ZIP Code (40222), County (Jefferson KY), and Year (2023). Below these filters, the lead name 'TATEST TATEST' is shown, along with an 'Add Preferences' button. The interface then lists various plan categories: Advantage Plans (4), Medicare Supplement Plans (10), Prescription Drug Plans (3), and Ancillary Plans (9). A section for 'Hospital Indemnity Flex' is highlighted, showing a monthly premium of \$0.00 and options to 'Calculate Premium', 'Add To Portfolio', and 'Enroll Now'. Below this, the 'Select Available Plans' section shows two options: 'Hospital Admission Indemnity' and 'Daily Hospital Indemnity', both with a premium of \$0.00. At the bottom, a 'Recovery Care' plan is also visible.

Product Portfolio

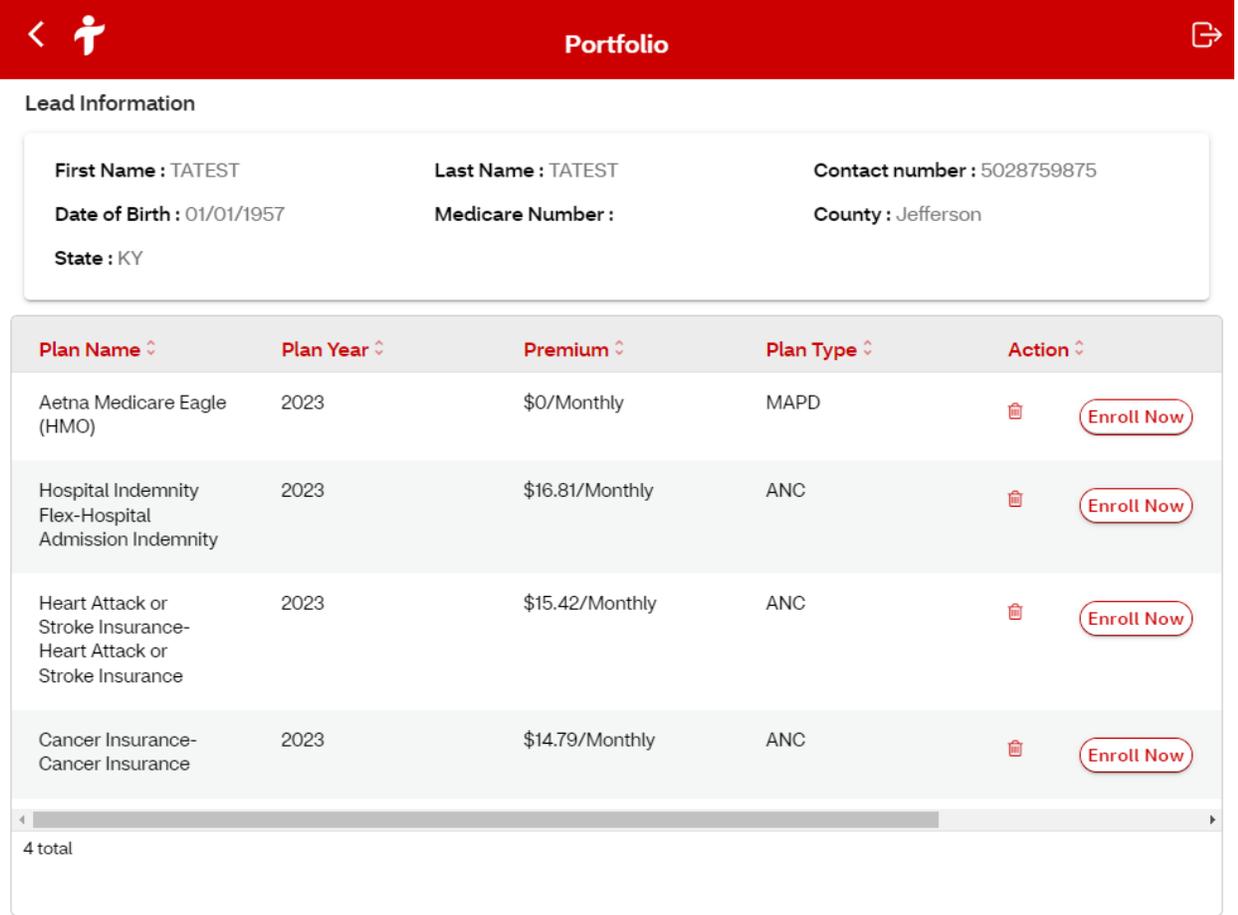
When you or your client are considering multiple plans, you can gather & save those plan options in the **Portfolio**.

The Portfolio feature will **not allow incompatible plans** i.e., MAPD & PDP, to be saved in the Portfolio at the same time.

You may enroll in any plan – For which you are RTS – either directly from the Portfolio, or from the Plan screen with “”.

Once you have enrolled, the plan is removed from the lead’s Portfolio.

Only one plan can be enrolled-in at a time.



The screenshot shows a mobile application interface for a 'Portfolio'. At the top, there is a red header with a back arrow, a person icon, the word 'Portfolio', and a share icon. Below the header is a 'Lead Information' section with a white background and rounded corners, containing fields for First Name (TATEST), Last Name (TATEST), Contact number (5028759875), Date of Birth (01/01/1957), Medicare Number, County (Jefferson), and State (KY). Below this is a table of plans with columns for Plan Name, Plan Year, Premium, Plan Type, and Action. The table lists four plans: Aetna Medicare Eagle (HMO), Hospital Indemnity Flex-Hospital Admission Indemnity, Heart Attack or Stroke Insurance-Heart Attack or Stroke Insurance, and Cancer Insurance-Cancer Insurance. Each plan has an 'Enroll Now' button. At the bottom of the table, there is a scroll bar and the text '4 total'. Below the table are two buttons: 'Clear Portfolio' and 'Browse For More Plans'.

Plan Name	Plan Year	Premium	Plan Type	Action
Aetna Medicare Eagle (HMO)	2023	\$0/Monthly	MAPD	 Enroll Now
Hospital Indemnity Flex-Hospital Admission Indemnity	2023	\$16.81/Monthly	ANC	 Enroll Now
Heart Attack or Stroke Insurance-Heart Attack or Stroke Insurance	2023	\$15.42/Monthly	ANC	 Enroll Now
Cancer Insurance-Cancer Insurance	2023	\$14.79/Monthly	ANC	 Enroll Now

Comparing Plans

When deciding between multiple Medicare Supplement plans, you can compare plans in Think Agent.

On the Plans page, first choose a lead, select an Effective Date, then click “**Compare Plans**” beside a Med. Supp. plan to see this screen (image right).

Toggle between the two tab options: **Compare Plans** and **Compare Rates**.

Compare Plans Compare Plans Compare Rates

✓ Plan covers 100% ✗ Plan does not cover % Benefits offered by each Medicare Supplement Plan

Benefits	Plan A	Plan F	Plan G	Plan N
Part A coinsurance and hospital costs	✓	✓	✓	✓
Part B copays or coinsurance	✓	✓	✓	✓
Blood (first 3 pints)	✓	✓	✓	✓
Part A hospice	✓	✓	✓	✓
Skilled Nursing Facility	✓	✓	✓	✓
Part A deductible	✓	✓	✓	✓
Part B deductible	✗	✓	✗	✗
Part B excess charges	✗	✓	✓	✗
Foreign travel emergency	✗	80%	80%	80%

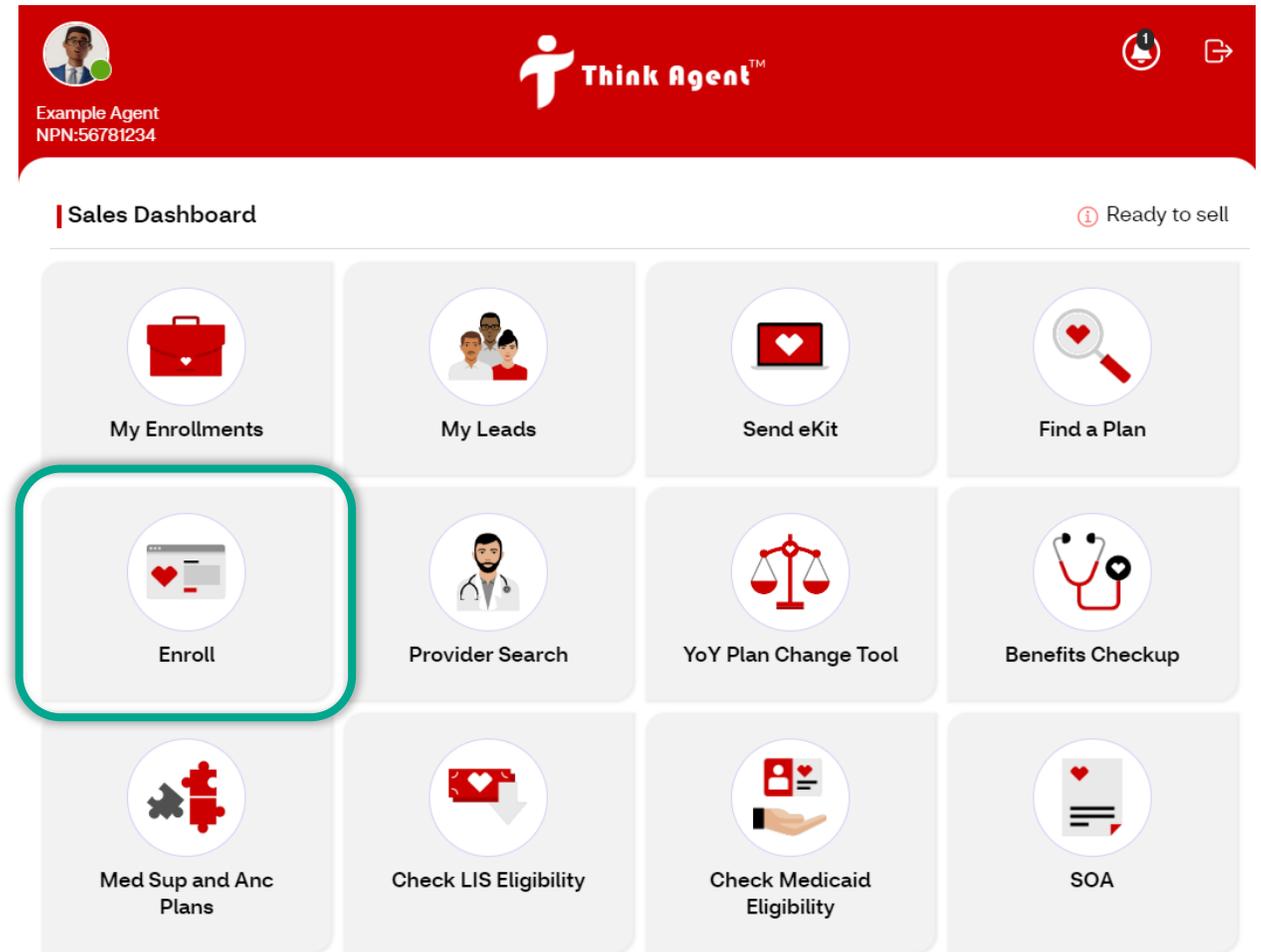
Enrollment

An enrollment can be started directly in a lead – By clicking “**Find Plan**” or by clicking “**Enroll**” from the Sales dashboard (image right).

After choosing the Plan Year, you will be brought to the **Find Plan** screen.

Select “**Enroll Now**” on single plan to proceed to the enrollment form.

When asked “**Is this a telephonic enrollment?**” choosing “Yes” or “No” will not change the enrollment form layout – Just how Aetna tags this enrollment in reporting once it is later submitted



Note: If you skipped to this guide page, see previous guide pages on creating a lead, choosing a plan, drugs, pharmacy, providers, Medicaid & LIS, etc. if needed

Enrollment – Plan Eligibility

Once in the application, Think Agent’s enrollment form is organized into four steps, each shown at the top of the screen (right):

The first step is to define the beneficiary’s **Plan Eligibility** with a series of initial – Required & optional - questions, including:

- Legal residency
- Tobacco usage
- DOB
- Medicare Effective Dates, Part A/B
- Current plan coverage

Note: There is built-in logic in the enrollment form to check responses and verify eligibility and premium amount based upon SSI’s rules.

The screenshot displays the 'Enrollment' process in a mobile application. At the top, a red header bar contains a back arrow, a person icon, the title 'Enrollment', and a share icon. Below the header is a progress indicator with four steps: 'Plan Eligibility' (active, marked with a red checkmark), 'Health Information', 'Payment Information', and 'Review & Signature' (all marked with grey checkmarks). The main content area shows the 'Medicare Supplement Plan B' selected from 'Aetna Health and Life Insurance Company'. The applicant's name is 'TATEST TATEST' and the monthly premium is '\$158.60', which is highlighted with a red dashed box. The form is divided into two sections: 'Plan and Premium Information' and 'Additional Information'. The first section includes fields for 'Plan Selected' (Medicare Supplement Plan B), 'Request Effective Date*' (04/06/2023), 'Payment Mode' (Monthly), 'Modal Premium' (\$158.60), 'Policy Fee*' (\$0.00), and 'Total initial collected draft*' (\$158.60). The second section includes fields for 'Applicant Name*' (TATEST TATEST), 'Phone Number*' (8449784465), 'Gender' (Male), 'Date of Birth*' (01/01/1957), 'Residential Address*' (101 TA Test Avenue), 'Apt/Suite Number', 'ZIP Code*' (40222), 'State*' (KY), and 'City*' (Example City). At the bottom, there are three buttons: 'Back', 'Save As Draft', and 'Next'.

Note: Not all fields are required. Required fields are indicated by a red asterisk (*)

Enrollment – Health Information

If the application type is “Underwritten,” these **Health Information** questions are required:

- Mobility device dependency
- Health conditions
- Past & active health treatments
- Past surgery procedures
- Other chronic conditions & diagnoses
- Physician information (optional)

Agent is required to read aloud & enter the client’s responses to these questions.

Once finished completing these questions, you may click “**Next**” to proceed with the enrollment application.

The screenshot displays the enrollment process for Medicare Supplement Plan B. At the top, a red navigation bar contains a back arrow, a person icon, the word "Enrollment", and a share icon. Below this is a progress indicator with four steps: Plan Eligibility (checked), Health Information (checked), Payment Information (unchecked), and Review & Signature (unchecked). The main content area shows the plan name "Medicare Supplement Plan B" by "Aetna Health and Life Insurance Company". Applicant details include "Applicant Name: TATEST TATEST" and "Monthly Premium: \$158.60". The "Health Questions" section contains four questions, each with "Yes" and "No" radio button options. The "No" options are selected for all questions. At the bottom, there are three buttons: "Back", "Save As Draft", and "Next".

Plan Name	Applicant Name	Monthly Premium
Medicare Supplement Plan B Aetna Health and Life Insurance Company	TATEST TATEST	\$158.60

Health Questions

1. Are you dependent on a wheelchair or any motorized mobility device? * Yes No
2. Do any of the following apply to you? *
A. Currently hospitalized, confined to a bed, in a nursing facility or assisted living facility, receiving home health care or physical therapy * Yes No
3. At any time, have you been medically diagnosed, treated, or had surgery for any of the following? *
A. Congestive heart failure, unoperated aneurysm, defibrillator * Yes No
B. Leukemia, lymphoma, multiple myeloma, cirrhosis * Yes No
C. Parkinson's Disease, Lou Gehrig's Disease, Alzheimer's Disease, dementia, multiple sclerosis, muscular dystrophy, cerebral palsy * Yes No
D. Chronic kidney disease, kidney failure, kidney disease requiring dialysis, renal insufficiency, Addison's Disease * Yes No

Buttons: Back, Save As Draft, Next

Note: Answering “Yes” for any of these question may disqualify the applicant from proceeding with enrollment into this plan. If so, you’ll see a pop-up.

Enrollment – Payment Information

The third segment of the application is **Payment Information**, allowing you to enter the below client information:

- Funding account details
- Payment method & draft date
- Split agent commissions (optional)
- Agent notes

Once finished completing these fields, you may click “**Next**” to proceed to the final segment of the enrollment application.

Note: Splitting commissions is not available for all plans. If chosen, commissions may be split between up-to-5 (ready-to-sell) agents.

Enrollment

Plan Eligibility Health Information **Payment Information** Review & Signature

Medicare Supplement Plan B Applicant Name: TATEST TATEST Monthly Premium: \$158.60
Aetna Health and Life Insurance Company

Add Funding Account(s)

Routing Number* Financial Institution Name* Account Type* Checking Savings

Account Number* Re-Enter Account Number*

Direct bill is not available for monthly payment mode. Payment mode can be updated in Plan Eligibility Screen (Plan and Premium Information Section).

Payment Method* Draft Initial Payment* Requested EFT Draft Date*

Agent Split Commission ⓘ ⊕ Add Agent

Agent Number* GNW0009894	Agent Name* Example Agent	Commission %* 50
Agent Number* GNW0007543	Agent Name* Example Agent Two	Commission %* 50

Agent Notes Medicare Supplement Plan B

Back Save As Draft Next

Enrollment – Review & Signature

The final segment of the enrollment application is **Review & Signature**, which presents the below fields:

- Upload documents (optional)
- Application review
- Documents review

Hint: During review, click the “✍️” icon in the upper right corner to make an edit to any field of the application you wish to adjust or change.

When you have finished the review, you will again reach the Payment Information screen, now with two signature options.

Enrollment

Plan Eligibility Health Information Payment Information Review & Signature

Medicare Supplement Plan B
Aetna Health and Life Insurance Company

Applicant Name: TATEST TATEST
Monthly Premium: \$158.60

Health History

Within the past 24 months if you have been medically diagnosed, treated, or had surgery for any brain, mental or nervous disorder, provide reason and dia...

Within the past five years if you have been hospitalized, treated at an outpatient facility, or emergency room, provide reason and diagnosis:

⊕ Add More

Prescribed Medications Reason for Medications (diagnosis)

Prescribed Medications Reason for Medications (diagnosis)

Physician Information

Your primary physician Physician's office name Phone

Back Next

Enrollment: Sign & Submit

After reviewing the application, you will be prompted to choose “**Sign & Submit**” or “Send for eSignature” to proceed.

Sign & Submit is intended for **face-to-face enrollments**, or telephonic enrollments.

With this option, the agent & beneficiary/ authorized representative will **apply their signature**, acknowledge the disclaimers, select contact preference, then click to “  ” this enrollment.

Note: See our “CARE – Telephonic Enrollment” eTraining to learn more about phone enrollment.

Submit Enrollment

Instructions

If applicant are in person:

- Select "In person" for every signer available in office
- Read out the instructions and collect/verify email from the signers
- Obtain acknowledgement from each signer
- Applicant(s) reviews the application
- All signers acknowledge eSignature consent
- Submit the application

Agent Signature

I, _____ certify that the applicant(s) have reviewed the completed application and have checked the boxes above and I agree that my electronic signature will be legally binding and enforceable as I had signed on paper and, understanding this, I agree to apply my electronic signature to:

- The Agent signature page of the application and overflow page, if applicable;
- The Replacement Notice form, if applicable; and
- The Agent request to split commissions page, if applicable

I agree to terms and conditions APPLY AGENT SIGNATURE

Member Signature

I, _____ have reviewed the application and forms and agree that the answers and information I provided have been accurately recorded. In addition I have reviewed and agree to the Terms of Use and Electronic Signature Consent I agree that my electronic signature will be as legally binding and enforceable as if I had signed on paper and, understanding this, I agree to apply my electronic signature to:

- The Applicant's Agreement page of the application and overflow page, if applicable;

Enrollment: Send For eSignature

After reviewing the application, you will be prompted to choose “Sign & Submit” or “**Send for eSignature**” to proceed.

Send for eSignature is an option to send the completed enrollment to the client via secure email – For their review & signature.

With this option, clicking “ **SUBMIT** ” does not submit the enrollment – It **sends it to your client** (along with a Verification Code) to review, sign, and submit if they choose.

Once submitted, you will receive an **email confirmation** & confirmation number.

The screenshot shows a web form titled "Submit Enrollment" with a red header bar. The form is divided into sections. The "Agent Signature" section has a heading "Agent Signature" and "Instructions" that state: "Apply your agent signature by clicking on the 'I accept' checkbox and 'Apply Agent signature'. Once Applicant (and Owner if applicable), electronic signatures are completed, the application will be **automatically submitted to home office.**" Below this, there is a checked checkbox "I agree to terms and conditions" and a red button "APPLY AGENT SIGNATURE". A "Signature Process Success" section follows, containing a checked checkbox "Allow Email Contact". Underneath, there are two input fields: "Email Address *" with the value "example@example.com" and "Confirm Email Address *" with the value "example@example.com". Below these is an unchecked checkbox "Allow Phone Contact". At the bottom of the form are two red buttons: "CANCEL SIGNATURE" and "SUBMIT".

Note: Find this enrollment in My Enrollments with the Verification Code. This code is used by the client to open a secured link to this enrollment form.

Enrollment Confirmation

After **submitting or sending the application**, you will see this screen (see right).

Importantly, on this screen, you have the **Confirmation Number** (this will include “Pend” if only sent for eSignature), as well as an option to “ **Download**.”

If you exit this screen, you can find these options & the application in **My Enrollments**.

***The HRA is not available for Medicare Supplement or Complementary plan enrollments**



Thank you!

Your enrollment is submitted successfully.

Confirmation Number: **T12300766356A**

 **Download**


Home


Calendar


Resources


More

Hint: You may find the Policy Number in My Enrollments (next guide page) under each respective enrollment.

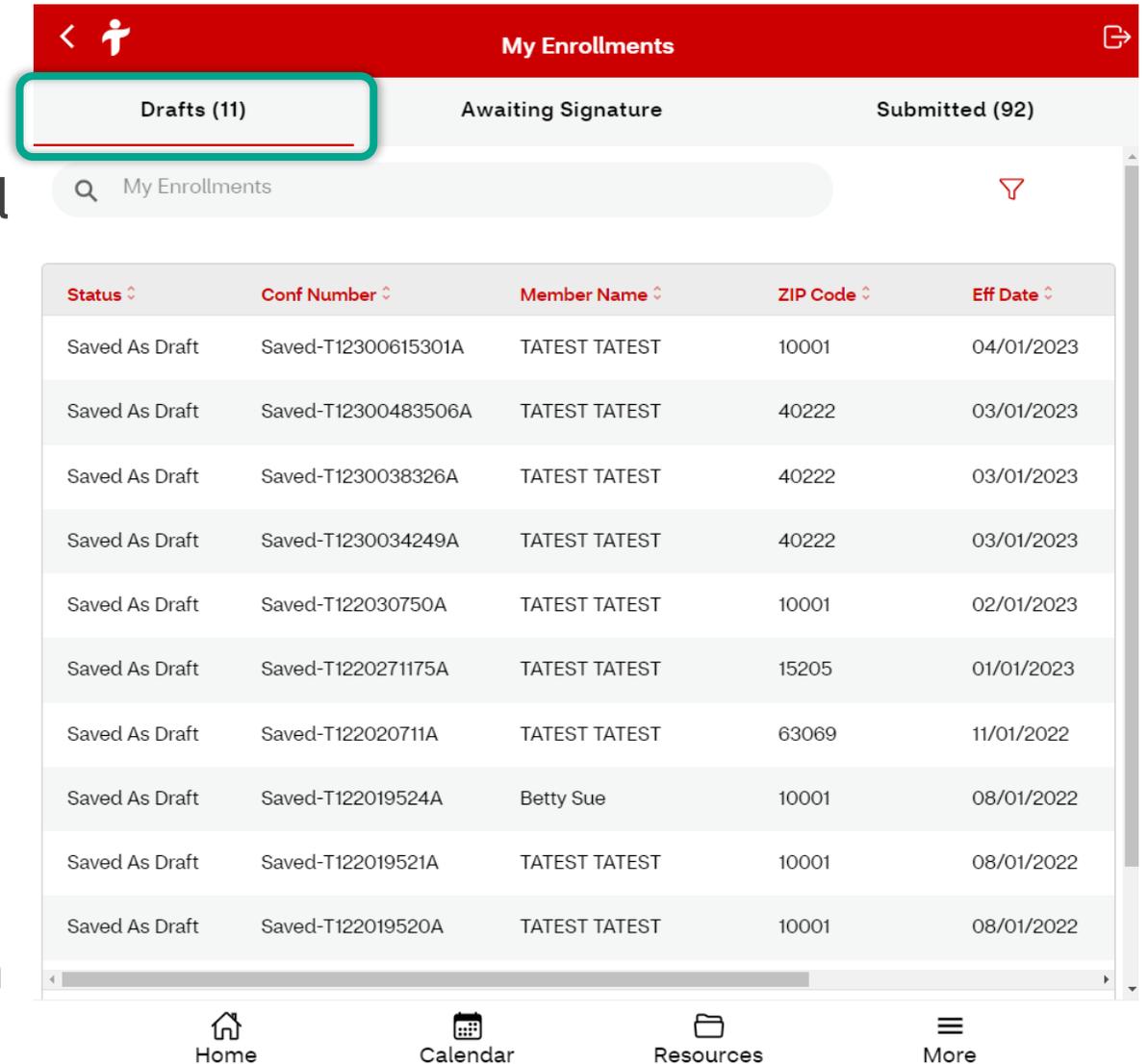
My Enrollments – Saved Drafts

My Enrollments displays all **saved**, pending-signature, and submitted enrollments initiated in Think Agent (not paper or other sources).

For **Draft** enrollments, click their row to view details; and click “**Edit**” to resume the application where you left-off before saving.

Note: Remember, any application found in this tab is not submitted. Continue this application (steps above) or begin a new application from your lead.

If you do not wish to keep or resume this drafted enrollment application, find the option to “ Delete” by clicking the application’s row.



Status	Conf Number	Member Name	ZIP Code	Eff Date
Saved As Draft	Saved-T12300615301A	TATEST TATEST	10001	04/01/2023
Saved As Draft	Saved-T12300483506A	TATEST TATEST	40222	03/01/2023
Saved As Draft	Saved-T1230038326A	TATEST TATEST	40222	03/01/2023
Saved As Draft	Saved-T1230034249A	TATEST TATEST	40222	03/01/2023
Saved As Draft	Saved-T122030750A	TATEST TATEST	10001	02/01/2023
Saved As Draft	Saved-T1220271175A	TATEST TATEST	15205	01/01/2023
Saved As Draft	Saved-T122020711A	TATEST TATEST	63069	11/01/2022
Saved As Draft	Saved-T122019524A	Betty Sue	10001	08/01/2022
Saved As Draft	Saved-T122019521A	TATEST TATEST	10001	08/01/2022
Saved As Draft	Saved-T122019520A	TATEST TATEST	10001	08/01/2022

My Enrollments – Awaiting Signature

My Enrollments displays all saved, **pending-signature**, and submitted enrollments initiated in Think Agent (not paper or other sources).

Applications **Awaiting Signature** require your or your client’s signature before they are submitted. Any application found under this tab is not submitted.

Open an enrollment by clicking its row. Find the option to resend the enrollment to your client by clicking “**Resend**” in the upper right.

You will also have the option to **Change Email** of recipient before resending, if you choose.

Status	Conf Number	Member Name	ZIP Code	Eff Date
Awaiting Signature	Pend-T12300943459A	TATEST TATEST	40222	05/01/2023
Awaiting Signature	Pend-T12300943331A	TATEST TATEST	40222	05/01/2023
Expired	Expired-T12300833894A	TATEST TATEST	40222	03/24/2023
Expired	Expired-T12300766759A	TATEST TATEST	40222	04/01/2023
Expired	Expired-T12300737353A	TATEST TATEST	40222	04/01/2023
Expired	Expired-T12300615178A	TATEST TATEST	10001	04/01/2023
Expired	Expired-T1230045380A	TATEST TATEST	10001	03/01/2023
Expired	Expired-T12203491A	TATEST TATEST	40222	01/01/2023
Expired	Expired-T122031130A	TATEST TATEST	10001	01/01/2023
Expired	Expired-T122025132A	TATEST TATEST	10001	10/01/2022

My Enrollments - Submitted

My Enrollments displays all saved, pending-signature, and **submitted** enrollments initiated in Think Agent (not paper or other sources).

Submitted enrollments are stored for all time to download, review and confirm submission.

Medicare Supplement & Complementary plan enrollments will display the **Policy Number** once you click the application's row to view more details.

Find the options to **Download** and Check Auto UW in additional enrollment details as well.

The screenshot shows the 'My Enrollments' screen in a mobile application. At the top, there is a red header with a back arrow, a person icon, the title 'My Enrollments', and a share icon. Below the header, there are three tabs: 'Drafts (11)', 'Awaiting Signature', and 'Submitted (92)'. The 'Submitted (92)' tab is highlighted with a red border. Below the tabs is a search bar with the text 'My Enrollments' and a filter icon. The main content is a table with the following columns: Status, Conf Number, Member Name, ZIP Code, and Eff Date. The table contains 10 rows of data, all with the status 'App Submitted'. At the bottom of the screen, there is a navigation bar with icons for Home, Calendar, Resources, and More.

Status	Conf Number	Member Name	ZIP Code	Eff Date
App Submitted	T12300893256A	TATEST TATEST	40222	03/31/2023
App Submitted	T12300766356A	TATEST TATEST	40222	04/01/2023
App Submitted	T12300812233A	TATEST TATEST	40222	04/01/2023
App Submitted	T12300766682A	TATEST TATEST	40222	04/01/2023
App Submitted	T12300727612M	TATEST TATEST	40222	04/01/2023
App Submitted	T12300615206A	TATEST TATEST	10001	04/01/2023
App Submitted	T12300582905A	TATEST TATEST	10001	03/01/2023
App Submitted	T12300582896A	TATEST TATEST	10001	03/01/2023
App Submitted	T12300555221M	TATEST TATEST	40222	03/01/2023
App Submitted	T1230049160A	TATEST TATEST	40222	02/19/2023

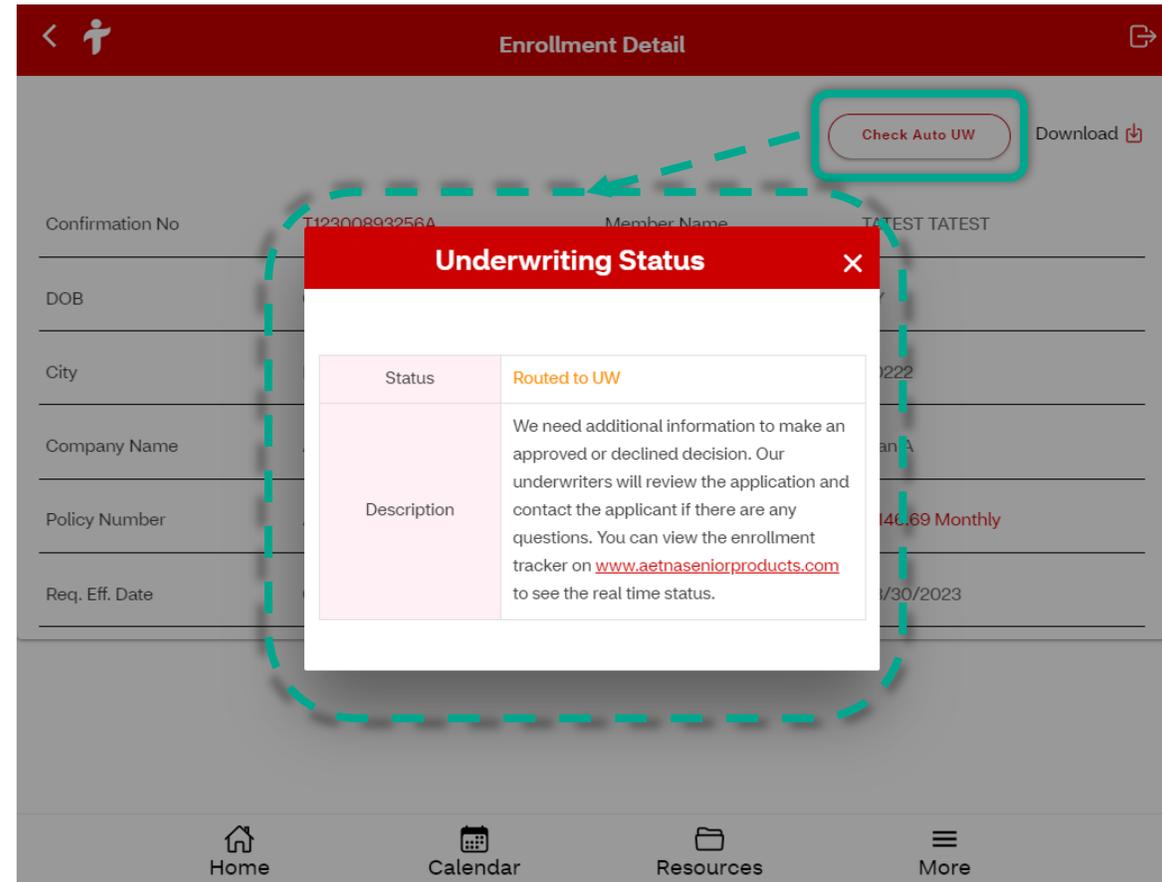
My Enrollments – Auto UW Status

For any Medicare Supplement or Complementary plan enrollment submitted from Think Agent, in **My Enrollments**, click the row of the application to view more details.

Included in these enrollment details is the option to “” in the upper right corner.

In as little as 5 – 15 minutes post-submission, the real-time underwriting status displayed here will indicate one of the below results:

- Check again shortly (still within 15-minutes)
- Routed to UW
- Declined
- Approved



Thank You!
