

Agent Management Tool


Licensed Only Agent Quick Reference Guide

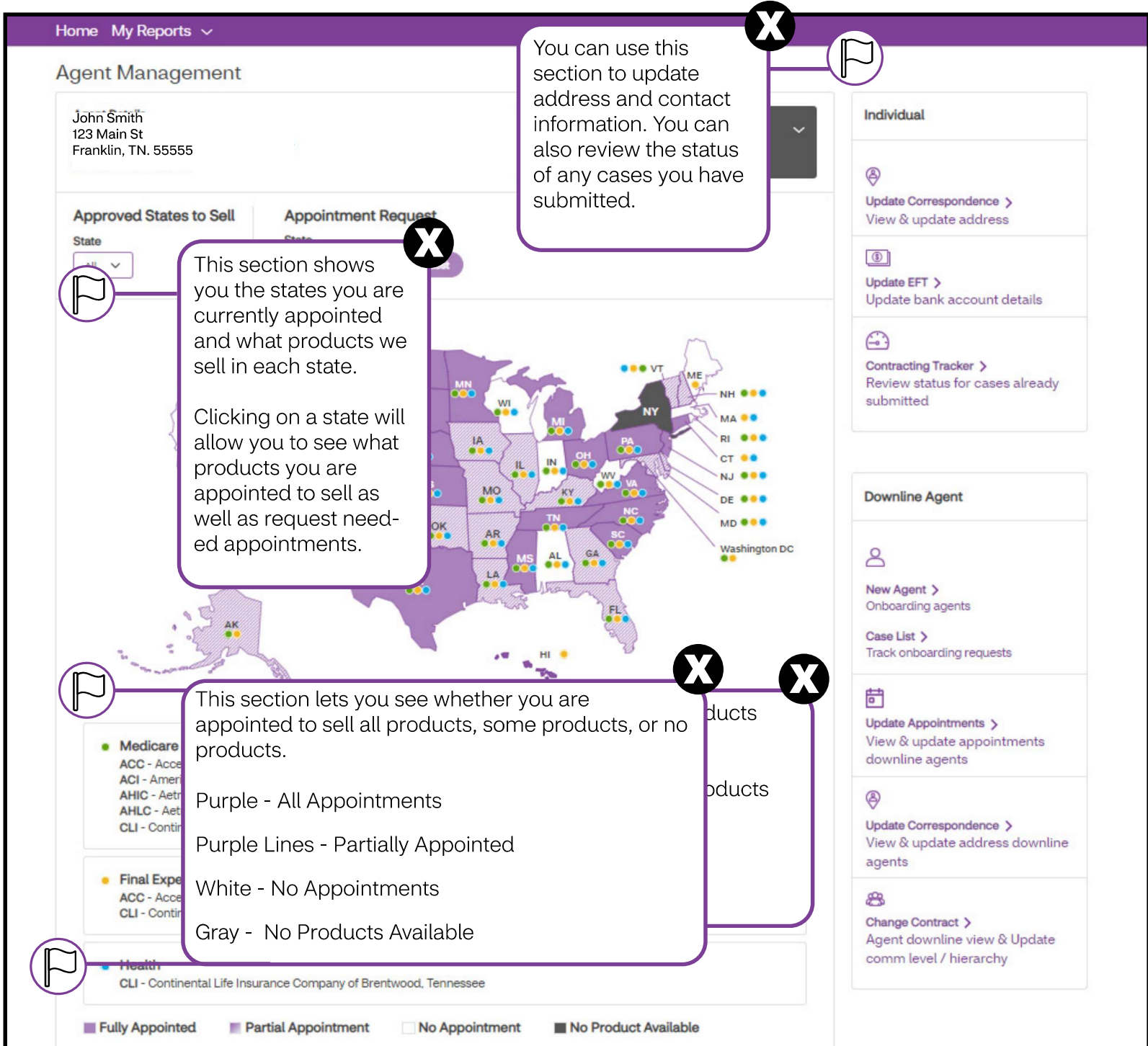



Our goal is always to develop tools and resources that will help agents grow their business and support their clients. Over the next several months we will be rolling out various updates to the Aetna Senior Products Website. The first of these are changes to the Agent Maintenance Tool, which will now be called the **Agent Management Tool**.

The **Agent Management Tool** will allow even more control over your account. Using this tool, agents will be able to view current appointments, request appointments, and update demographic information. This guide will walk you through the various pages.

Home Screen

The **Agent Management Home Screen** allows you to access most of the great features with a simple click. Click on the  icons to learn more about what each section can do.





Home My Reports 

Agent Management

John Smith
123 Main St
Franklin, TN. 55555

Approved States to Sell **Appointment Request**

State  All 




This section shows you the states you are currently appointed and what products we sell in each state. Clicking on a state will allow you to see what products you are appointed to sell as well as request needed appointments.

You can use this section to update address and contact information. You can also review the status of any cases you have submitted.





This section lets you see whether you are appointed to sell all products, some products, or no products.

- Medicare ACC - Acc ACCI - Amer AHIC - Aet AHLC - Aet CLI - Contin
- Final Expense ACC - Acc CLI - Contin
- Health CLI - Continental Life Insurance Company of Brentwood, Tennessee





Individual

-  **Update Correspondence** > View & update address
-  **Update EFT** > Update bank account details
-  **Contracting Tracker** > Review status for cases already submitted

Downline Agent

-  **New Agent** > Onboarding agents
- Case List** > Track onboarding requests
-  **Update Appointments** > View & update appointments downline agents
-  **Update Correspondence** > View & update address downline agents
-  **Change Contract** > Agent downline view & Update comm level / hierarchy

Legend:

-  Fully Appointed
-  Partial Appointment
-  No Appointment
-  No Product Available

Individual

If you need to edit information for yourself, that can be done under the 'Individual' section of Agent Management.

Update Correspondence (Individual)

By clicking on 'Update Correspondence' under individual from the [Agent Management Home Screen](#), you will be able to update your address and contact information.

Home My Reports ▾

Agent Management > Demographics Update

Address Book

Agent Number GNW000123

John Smith

THE ENTRECOR GROUP, INC.
123 Main St
Franklin, TN. 55555

615-555-5555 615-555-5554

SmithJ@insuranceco.com

Address and contact information can be changed by clicking on the pen icon and submitting changes. Agents can expect changes to take effect within five business days.

