Aetna Quote and Enroll

To launch the tool

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

Aetna Quote & Enroll An enrollment tool for all Aetna SSI broker products	@ Aetna Quote & Enroll >

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**
      i. 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" **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.

Start enrollment				⊗
	First name	Last name	Date of birth	Are you a legal resident?
Applicant-A			12/23/1940	Yes | No

Close   **Start enrollment**

   i. **Plan Eligibility** - 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. **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 & Plan** - 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(s)** - Proposed 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** - 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** - 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
    i. 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