

AETNA MEDICARE RESOURCE CENTER

USER REFERENCE GUIDE



AETNA MEDICARE RESOURCE CENTER – REFERENCE GUIDE

AETNA MEDICARE RESOURCE CENTER REFERENCE GUIDE

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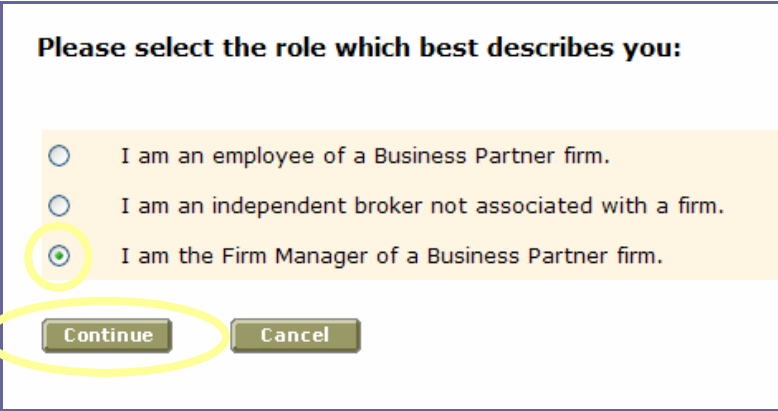
INTRODUCTION

The following reference guide details the process of registering and logging in to the Aetna Medicare Resource Center, and provides instructions for how to access marketing, training, and other material available on the site.

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REGISTRATION (FIRM MANAGER)

The following details the process of *registering firms and firm managers* in the Aetna Medicare Resource Center.

Step	Action
1.	<p>Click the Register Now button on the Aetna Medicare Resource Center Log In screen</p> 
2.	<p>Select the <i>Fulfillment Manager</i> option and click the Continue button</p> 

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Step	Action
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3. Complete the **Firm and Firm Manager** screen, then click the **Continue** button

Step 1 of 3: Firm & Firm Manager Information

Firm Information	
Firm Name:	Test Business Partner Firm
Tax ID Number:	1* - *****
Firm Manager Information*	
Social Security Number:	6** - ** - ****
Last Name:	Frawley
First Name:	Brian
Business E-mail Address:	b.frawley@aetna.com Why are we asking for your e-mail address?

4. Note Aetna's E-mail Policy, available by clicking the [Why are we asking for your e-mail address?](#) link

Aetna's™ E-mail Policy

E-mail address is a required field to obtain access to Aetna, Inc. internet tools. As we continue to increase efficiencies in our broker relations and communications, Internet tools and correct e-mail addresses are an integral part of serving you better in the months to come. E-mail communications may include notifying producers and general agents of licensing and compensation plans and sending information about new online services.

To enable AETNA to begin this service, it must begin collecting E-mail information from our producers and general agents. Under AETNA's [privacy policy](#), your E-mail address will not be sold or otherwise distributed to any third parties.

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5. Review the *Acknowledgement* screen and click the **Continue** button

By clicking on the "Continue" button below, I acknowledge and accept that:

I am an owner, officer or Manager of the firm for which this Firm Registration is being completed, and that I have authorization to execute agreements or otherwise act on the firm's behalf, including authorization to assign associates within the firm to use Aetna Medicare Resource Center and its applications.

In some portions of Aetna Medicare Resource Center I may have access to proprietary and confidential information, including personal commission data, confidential rating information, Aetna specific enrollment material and confidential underwriting guidelines. I understand that sharing any of this information with any person or entity without the written consent of Aetna is strictly prohibited.

The information contained on Aetna Medicare Resource Center is inherently limited in nature, may be inaccurate or incomplete, is subject to change without notice, and is continuously revised and updated. Furthermore, access to Aetna Medicare Resource Center is not a guarantee or acknowledgment by Aetna that the producer has an active state license, is or will be appointed by Aetna or a guarantee of payment of commissions. The content on Aetna Medicare Resource Center does not reflect all of the applicable terms and conditions of my producer agreement with Aetna. All payment of commissions is subject to applicable laws, regulations and Aetna policies.

6. Click the **Add** button to add the firm's users to AMRC user list

Employees on File

Firm Location: Test Business Partner Firm: blue bell , PA

Last Name	First Name	Primary Business Zip	Profile
<input type="button" value="Add"/> <input type="button" value="Back"/>			

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7. Complete the **Add Agent/Broker/Employee** screen, then click the **Continue** button

Note: Firm Manager has the ability to assign executive privileges for up to 4 firm employees.

Add Agent/Broker/Employee

Personal Information	
Last Name:	Hansen
First Name:	Scott
Social Security Number:	7** - ** - ****
Email Address:	SHansen@aetna.com Why are we asking for your e-mail address?
Primary Business Address	
Line1:	930 Harvest Dr
Line2:	
City:	Blue Bell
State:	PA
Zip:	19422
User Privilege	<input type="checkbox"/> Executive Privilege *
Primary Firm Location	
Line1:	Test Business Partner Firm: blue bell , PA

8. Click the **Add** button to add additional users to the AMRC user list < OR > the **Back** button to return to the **Aetna Medicare Resource Center Log In** screen

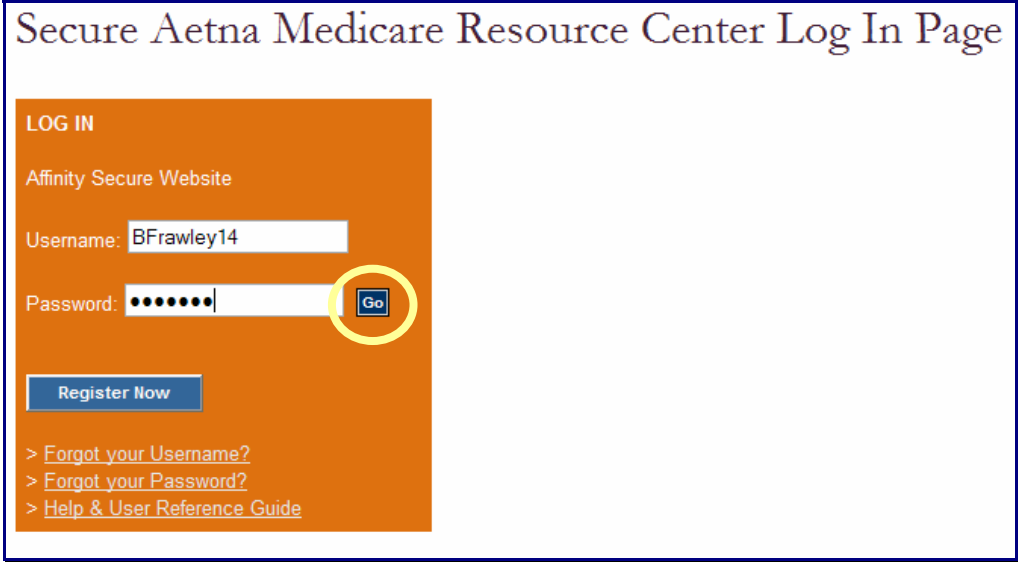
Employees on File

Employee added successfully.

Firm Location: Test Business Partner Firm: blue bell , PA

Last Name	First Name	Primary Business Zip	Profile
Hansen	Scott	19422	View/Update


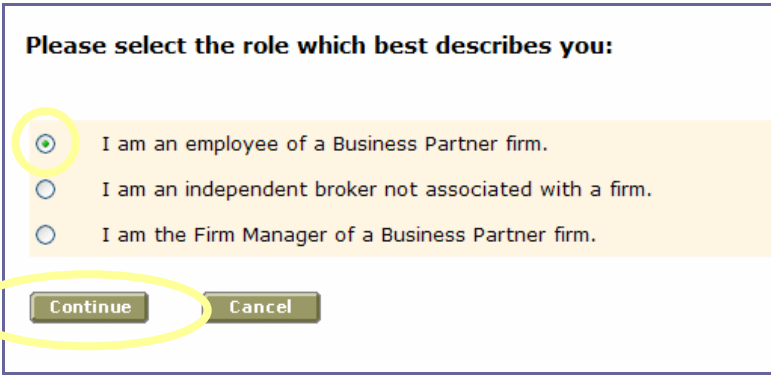
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Step	Action
9.	After adding employees, return to the main screen. Complete the Username and Password fields on the Aetna Medicare Resource Center Log In Page and click the Go button.
	

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REGISTRATION (USER – FIRM EMPLOYEE)

The following details the Aetna Medicare Resource Center *user registration* process.

Step	Action
1.	Click the Register Now button on the Aetna Medicare Resource Center Log In screen
	
2.	Select the <i>Employee</i> option and click the Continue button
	

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Step	Action
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3. Complete steps 1 – 4 of the **Aetna Medicare Resource Center Registration** process, then click the **Continue** button

Please complete items 1 through 4 below:
If you have any questions regarding Aetna Medicare Resource Center registration process, please call 1-800-225-3375 or [contact us](#).

#1	Social Security Number: 7** - ** - ****	Technical Questions?
#2	Last Name: Hansen	
#3	First Name: Scott	
#4	Zip Code of your primary business address: 19422	

4. Confirm that the correct e-mail address displays and click the **Email** button, otherwise click the **No, thanks** button

Aetna will send you a registration confirmation email after you finish the registration for Aetna Medicare Resource Center.

Please confirm the accuracy of the email address we currently have on file.

SHansen@aetna.com

If the email address is correct, click on the email button, and you will receive your registration confirmation email momentarily.

If you do not wish to receive this registration confirmation email from Aetna, click on the "No, Thanks" button. Please make a note of the User Name you selected or that was assigned to you by the system for your records.

[Technical Questions?](#)

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Step	Action
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5. Complete steps 5 – 7 of the **Aetna Medicare Resource Registration** process, then click the **Continue** button

Please complete items 5, 6 and 7 below:
If you have any questions regarding Aetna Medicare Resource Center registration process, please call 1-800-225-3375 or [contact us](#).

#5 User Name: <input type="text" value="scott148"/>	Create a unique user name between 6 and 64 characters long. Use letters, numbers or any of the following: _ - ~ @. Example: Jsmith2 Or leave blank and we will assign a unique user name for you.
#6 Password: <input type="password" value="....."/> Re-enter your password to confirm it: <input type="password" value="....."/>	PASSWORD TIPS: <ul style="list-style-type: none">- It may not be your NAME or USER NAME- It's case sensitive- Don't repeat the same character more than twice in a row Important Tip: Your password must be between 6 - 20 characters and must include a minimum of 1 letter and 1 number. Example: pass2word. View other password tips .
#7 Security Question: <input type="text" value="What is your favorite food?"/> Please provide the answer to your security phrase: <input type="text" value="Sushi"/>	Technical Questions? For security purposes , this phrase will be asked if you need assistance with your logon or password reset.

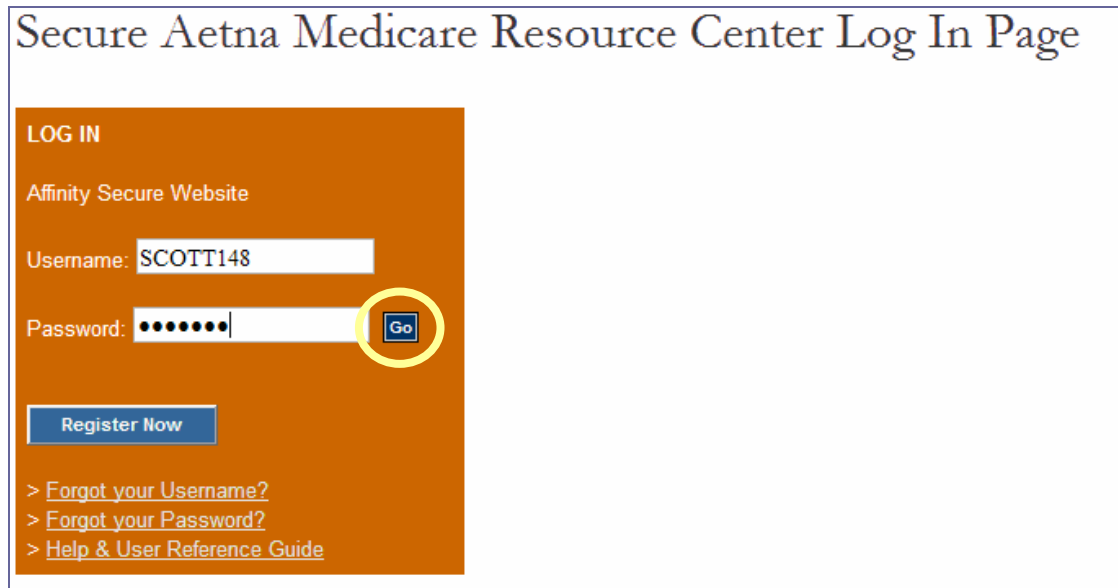
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Step	Action
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6. Confirm that the correct User Name displays, then click the **Login** button




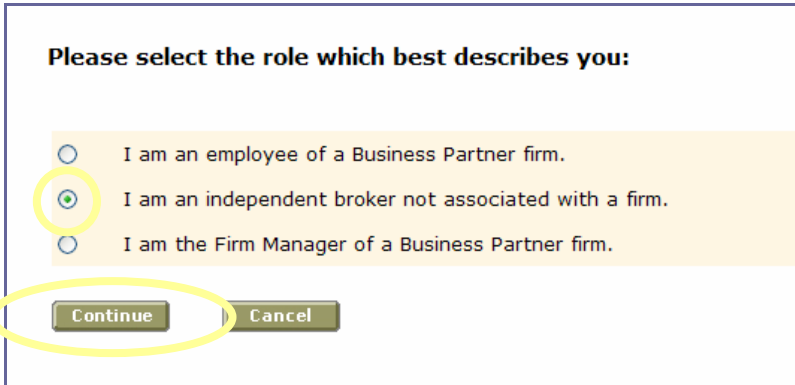
5. Complete the Username and Password fields on the **Aetna Medicare Resource Center Log In Page** and click the **Go** button



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REGISTRATION (USER – INDEPENDENT BROKER)

The following details the Aetna Medicare Resource Center *user registration* process.

Step	Action
1.	<p>Click the Register Now button on the Aetna Medicare Resource Center Log In screen</p> <div data-bbox="516 537 1284 978"></div>
2.	<p>Select the <i>Employee</i> option and click the Continue button</p> <div data-bbox="505 1079 1295 1461"></div>

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Step	Action									
3.	<p>Complete steps 1 – 4 of the Aetna Medicare Resource Center Registration process, then click the Continue button</p> <div data-bbox="381 403 1437 1041"><p style="text-align: center;">Aetna Medicare Resource Center Registration</p><p style="text-align: center;">Please complete items 1 through 4 below: If you have any questions regarding Aetna Business Alliance registration process, please call 1-800-225-3375 or contact us.</p><table border="1"><tr><td data-bbox="402 583 467 630">#1</td><td data-bbox="475 590 1112 640">Social Security Number: 2** - ** - ****</td><td data-bbox="1120 583 1382 955" rowspan="4">Technical Questions?</td></tr><tr><td data-bbox="402 674 467 720">#2</td><td data-bbox="475 680 1112 751">Last Name: Doe</td></tr><tr><td data-bbox="402 772 467 819">#3</td><td data-bbox="475 779 1112 850">First Name: John</td></tr><tr><td data-bbox="402 871 467 917">#4</td><td data-bbox="475 877 1112 928">Zip Code of your primary business address: 19422</td></tr></table><p style="text-align: center;"><input type="button" value="Continue"/> <input type="button" value="Cancel"/></p></div>	#1	Social Security Number: 2** - ** - ****	Technical Questions?	#2	Last Name: Doe	#3	First Name: John	#4	Zip Code of your primary business address: 19422
#1	Social Security Number: 2** - ** - ****	Technical Questions?								
#2	Last Name: Doe									
#3	First Name: John									
#4	Zip Code of your primary business address: 19422									

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Step	Action
4.	<p>Confirm that the correct e-mail address displays and click the Email button, otherwise click the No, thanks button</p> <div data-bbox="469 401 1343 1041"><p>Aetna will send you a registration confirmation email after you finish the registration for Aetna Medicare Resource Center.</p><p>Please confirm the accuracy of the email address we currently have on file.</p><p>JDoe@yahoo.com</p><p>If the email address is correct, click on the email button, and you will receive your registration confirmation email momentarily.</p><p>If you do not wish to receive this registration confirmation email from Aetna, click on the "No, Thanks" button. Please make a note of the User Name you select or that will be assigned to you by the system for your records.</p><p>Technical Questions?</p><p>Email No, thanks Cancel</p></div>

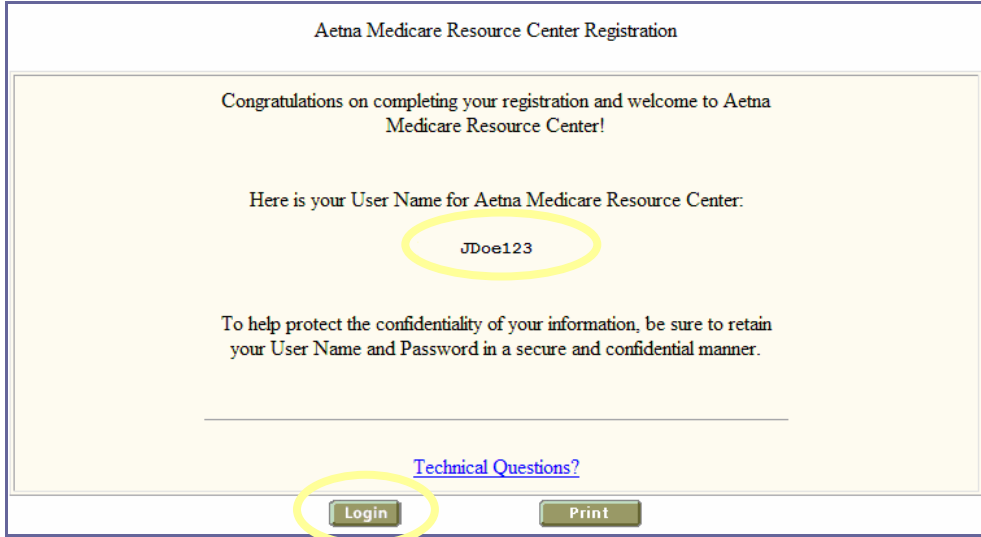
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Step	Action						
5.	<p>Complete steps 5 – 7 of the Aetna Medicare Resource Registration process, then click the Continue button</p> <div data-bbox="381 399 1421 1092"><p style="text-align: center;">Please complete items 5, 6 and 7 below: If you have any questions regarding Aetna Medicare Resource registration process, please call 1-800-225-3375 or contact us.</p><table border="1"><tr><td data-bbox="406 493 925 640">#5 User Name: <input type="text" value="JDoe123"/></td><td data-bbox="925 493 1388 640">Create a unique user name between 6 and 64 characters long. Use letters, numbers or any of the following: _ - ~ @. Example: Jsmith2 Or leave blank and we will assign a unique user name for you.</td></tr><tr><td data-bbox="406 640 925 850">#6 Password: <input type="password" value="••••••"/> Re-enter your password to confirm it: <input type="password" value="••••••"/></td><td data-bbox="925 640 1388 850">PASSWORD TIPS: It may not be your NAME or USER NAME It's case sensitive Don't repeat the same character more than twice in a row Important Tip: Your password must be between 6 - 20 characters and must include a minimum of 1 letter and 1 number. Example: pass2word. View other password tips.</td></tr><tr><td data-bbox="406 850 925 1060">#7 Security Question: <input type="text" value="What is/was your mother's maiden name?"/> <input type="button" value="v"/> Please provide the answer to your security phrase: <input type="text" value="Jones"/></td><td data-bbox="925 850 1388 1060">Technical Questions? For security purposes, this phrase will be asked if you need assistance with your logon or password reset.</td></tr></table><p style="text-align: center;"><input type="button" value="Continue"/> <input type="button" value="Cancel"/></p></div>	#5 User Name: <input type="text" value="JDoe123"/>	Create a unique user name between 6 and 64 characters long. Use letters, numbers or any of the following: _ - ~ @. Example: Jsmith2 Or leave blank and we will assign a unique user name for you.	#6 Password: <input type="password" value="••••••"/> Re-enter your password to confirm it: <input type="password" value="••••••"/>	PASSWORD TIPS: It may not be your NAME or USER NAME It's case sensitive Don't repeat the same character more than twice in a row Important Tip: Your password must be between 6 - 20 characters and must include a minimum of 1 letter and 1 number. Example: pass2word. View other password tips .	#7 Security Question: <input type="text" value="What is/was your mother's maiden name?"/> <input type="button" value="v"/> Please provide the answer to your security phrase: <input type="text" value="Jones"/>	Technical Questions? For security purposes , this phrase will be asked if you need assistance with your logon or password reset.
#5 User Name: <input type="text" value="JDoe123"/>	Create a unique user name between 6 and 64 characters long. Use letters, numbers or any of the following: _ - ~ @. Example: Jsmith2 Or leave blank and we will assign a unique user name for you.						
#6 Password: <input type="password" value="••••••"/> Re-enter your password to confirm it: <input type="password" value="••••••"/>	PASSWORD TIPS: It may not be your NAME or USER NAME It's case sensitive Don't repeat the same character more than twice in a row Important Tip: Your password must be between 6 - 20 characters and must include a minimum of 1 letter and 1 number. Example: pass2word. View other password tips .						
#7 Security Question: <input type="text" value="What is/was your mother's maiden name?"/> <input type="button" value="v"/> Please provide the answer to your security phrase: <input type="text" value="Jones"/>	Technical Questions? For security purposes , this phrase will be asked if you need assistance with your logon or password reset.						

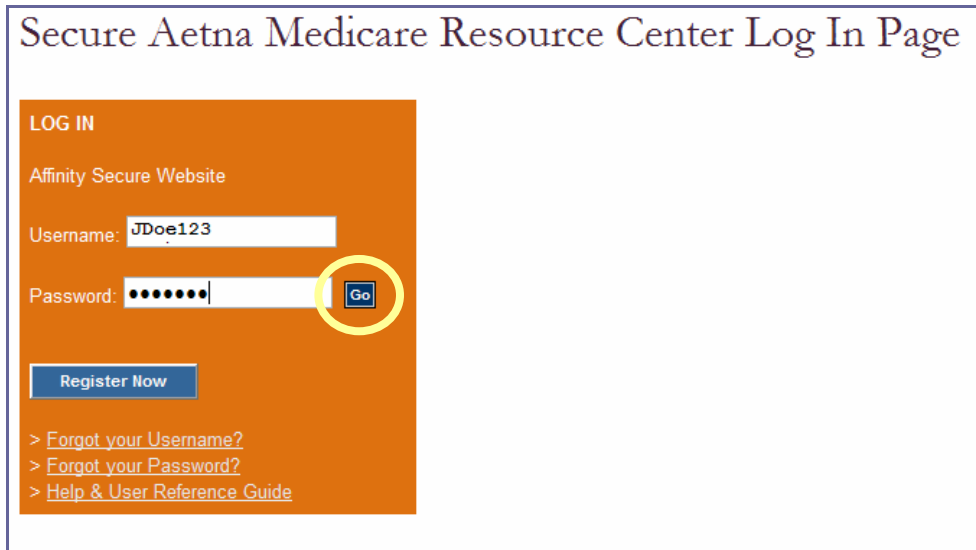
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Step	Action
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6. Confirm that the correct User Name displays, then click the **Login** button



5. Complete the Username and Password fields on the **Aetna Medicare Resource Center Log In Page** and click the **Go** button

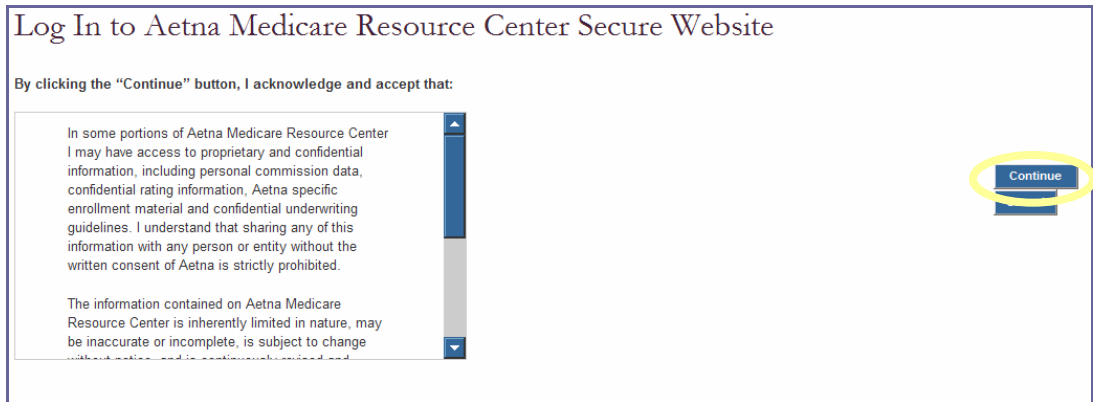


PORTAL NAVIGATION

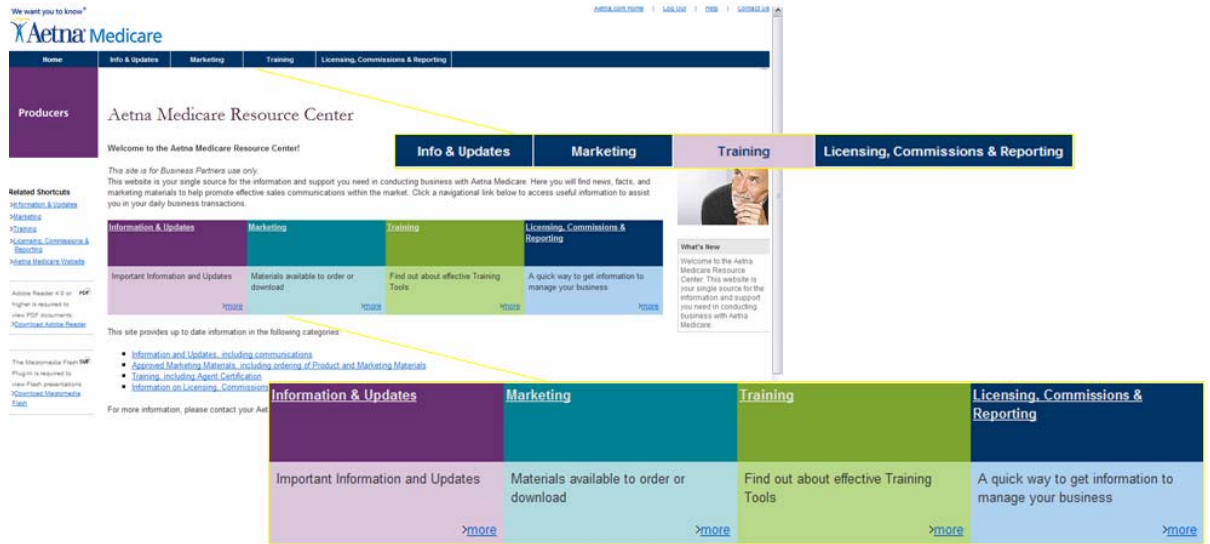
The following highlights the main sections of the **Aetna Medicare Resource Center – “Information and Updates”, “Marketing”** (see **ORDERING SALES AND MARKETING MATERIAL** for details on ordering enrollment kits and brochures), **“Training”** and **“Licensing, Commissions and Reporting.”**

Step	Action
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1. Click the **Continue** button on the **Site Acknowledgement** screen



2. Note the variety of navigational/menu options to access the **Aetna Medicare Resource Center** site’s four main sections: **Information and Updates, Marketing, Training** and **Licensing, Commissions and Reporting**




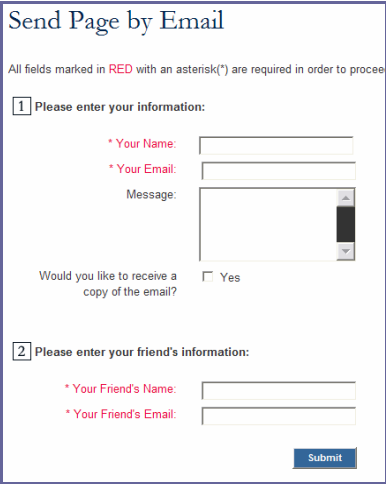

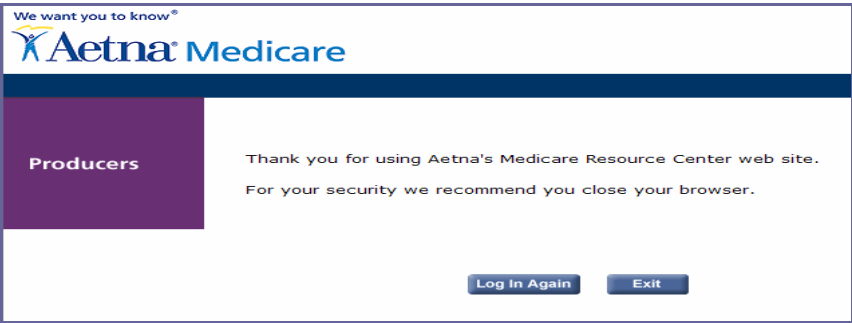
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Step	Action
3.	<p>The Information and Updates sub-menu includes links to News and Alerts, What's Happening in Your Area..., Frequently Asked Questions, Key Contacts, and General Aetna Medicare information – additional links and resources will become available over time</p> <div data-bbox="581 432 1230 898" style="border: 1px solid black; padding: 10px;"><h3 style="text-align: center;">Information & Updates</h3><p>Select from list of links below:</p><ul style="list-style-type: none">▪ News & Alerts▪ What's Happening in Your Area...▪ Frequently Asked Questions▪ Key Contacts▪ Related Links ▪ Product Information▪ Aetna Medicare Prescription Drug Plans: Benefits-at-a-Glance▪ Aetna Medicare Advantage Plans: Benefits-at-a-Glance▪ About Medicare▪ Send Feedback, Suggestions, & Complaints</div>
4.	<p>The Marketing sub-menu provides links to the Aetna Medicare Broker Builder site for Aetna-approved advertising collateral, lead generation material, poster generation and sales presentation support</p> <p>Note: see ORDERING SALES AND MARKETING MATERIAL for details on ordering enrollment kits and brochures</p> <div data-bbox="427 1167 1386 1507" style="border: 1px solid black; padding: 10px;"><h3 style="text-align: center;">Marketing</h3><p>Grow your business with customizable marketing materials that promote your agency and define what sets Aetna Medicare plans apart. New materials are added all the time, so be sure to check back frequently.</p><p>For customized marketing materials, you may:</p><ol style="list-style-type: none">1. Customize and download directly online then take them to the printer of your choice. Visit the Aetna Medicare Broker Builder site.2. Or, contact your Broker Service Representative at 1-888-247-1050 to request access to Aetna Medicare Broker Builder site or to order materials not available through the Broker Builder site.<p>To order enrollment kits and brochures:</p><ul style="list-style-type: none">▪ Enrollment Kits & Brochures</div>

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Step	Action
5.	<p>The Training sub-menu provides access to Training material. Additional material will be available over time</p> <div data-bbox="418 401 1386 798" style="border: 1px solid black; padding: 10px;"><h3>Training</h3><p>Aetna's Learning Center (ALCx) for Retiree Markets Medicare Sales Affiliates</p><p>The Aetna Learning Center (ALCx) site was designed with your learning certification needs/requirement in mind. We've made learning simple to access, complete and track. The ALCx Site includes:</p><ul style="list-style-type: none">▪ A range of learning and performance programs tailored to your learning needs.▪ Select courses covering Federal Medicare, Aetna's product portfolio and general courses on how Aetna's Retiree Markets organization functions.▪ Easy-to-navigate course search and enrollment process.▪ Timely and useful resources and tools.<p>If this is your first time visiting the ALCx Site, you'll be asked to complete a one-time registration after clicking on the link below.</p><p>There's no time like now to put information to work for you and Aetna Medicare prospective members. Begin learning today!</p><ul style="list-style-type: none">▪ Affinity Partner - Standard Training Guide▪ Standard Training for All</div>
6.	<p>The Licensing, Commissions and Reporting sub-menu links to <i>Producer World's Available License and Appointment Information</i> screen</p> <p>Note: <i>Producer World</i> has a link back to the Aetna Medicare Resource Center on it's home page</p> <div data-bbox="423 1033 1382 1690" style="border: 1px solid black; padding: 10px;"><h2>Licensing, Commissions & Reporting</h2><ul style="list-style-type: none">▪ Custom Report - Application Fallout Report▪ Custom Report - Monthly Commission Payment Details<h3>License and Appointment Information</h3><ul style="list-style-type: none">▪ License and Appointments Information<h3>Commission Reports</h3><ul style="list-style-type: none">▪ Monthly Commission Payment Summary Report▪ Year-to-Date Commission Payment Summary Report<h3>Enrollment Reports</h3><ul style="list-style-type: none">▪ Enrollment Roster Report▪ Application Pipeline Status Report</div>

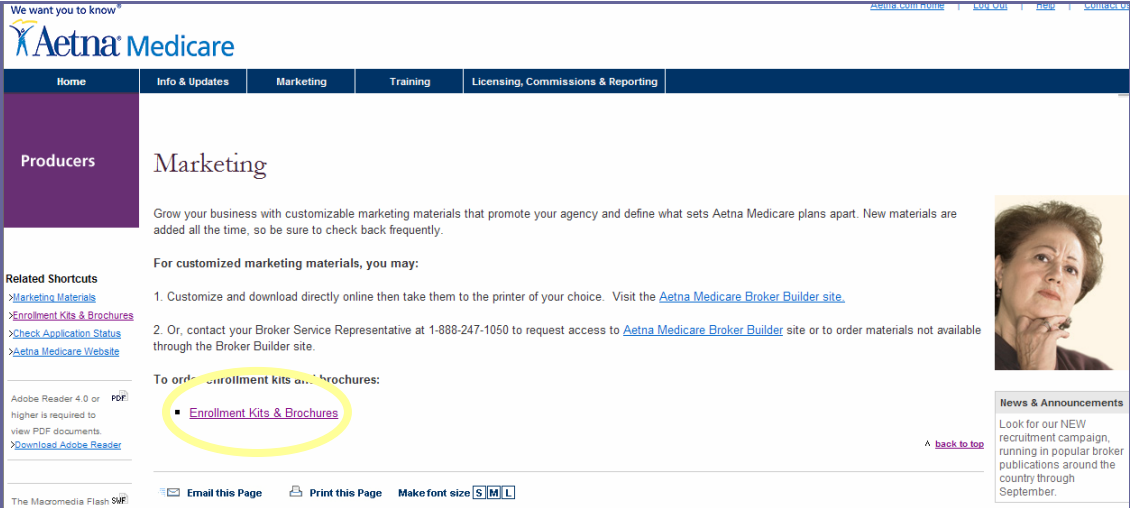
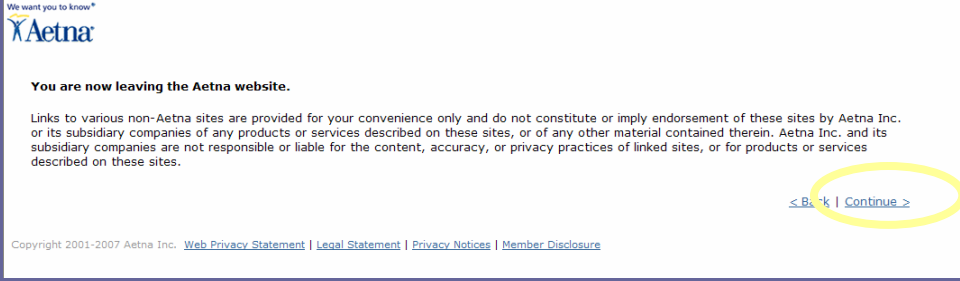
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Step	Action
7.	<p>Click the  Email this Page link to e-mail the Aetna Medicare Resource Center page. This feature is available from all Aetna Medicare Resource Center screens</p> <div data-bbox="711 409 1094 890"></div>
8.	<p>Note the ability to print Aetna Medicare Resource Center screens and enlarge or reduce font size, also available from any Aetna Medicare Resource Center screen</p> <div data-bbox="649 1039 1149 1071"> Print this Page Make font size S M L</div>
9.	<p>Click the Log Out link to log out of the Aetna Medicare Resource Center</p> <div data-bbox="479 1213 1326 1533"></div>

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ORDERING SALES AND MARKETING MATERIAL

The following details the process of requesting enrollment kits, brochures, and other sales and marketing material.

Step	Action
1.	<p>On the AMRC Marketing Page click on the Enrollment Kits & Brochures link.</p>  <p>The screenshot shows the Aetna Medicare website's Marketing page. A navigation menu at the top includes Home, Info & Updates, Marketing, Training, and Licensing, Commissions & Reporting. The main content area is titled 'Marketing' and includes a sidebar with 'Producers' and 'Related Shortcuts'. The 'Enrollment Kits & Brochures' link is highlighted with a yellow circle. Below the main content, there are links for 'Email this Page', 'Print this Page', and 'Make font size [S] [M] [L]'. A 'News & Announcements' box is visible on the right side.</p>
2.	<p>Click through the leaving Aetna page.</p>  <p>The screenshot shows the Aetna website's leaving page. It features the Aetna logo and a message: 'You are now leaving the Aetna website.' Below this, there is a disclaimer about links to non-Aetna sites. At the bottom right, the '< Back Continue >' link is circled in yellow. The footer contains copyright information and links to 'Web Privacy Statement', 'Legal Statement', 'Privacy Notices', and 'Member Disclosure'.</p>

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3. Register with the **RR Donnelly** website for access (one time only) and click **Continue**.

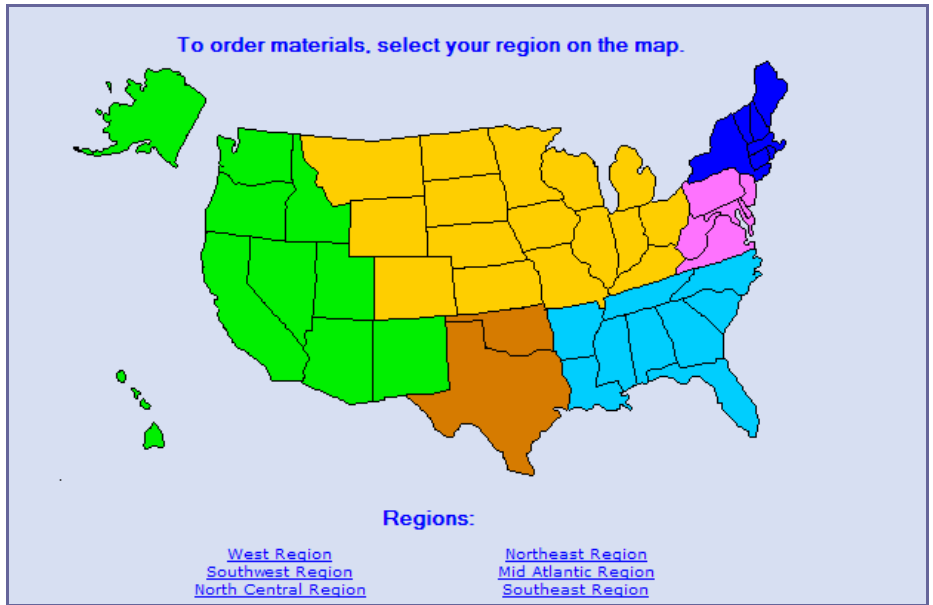
Welcome to the Aetna Small Group website. Please enter your user information below. This will be required only once for registration purposes.

First Name:* MI: Last Name:*

Firm/Agency Name:*

Email Address:*

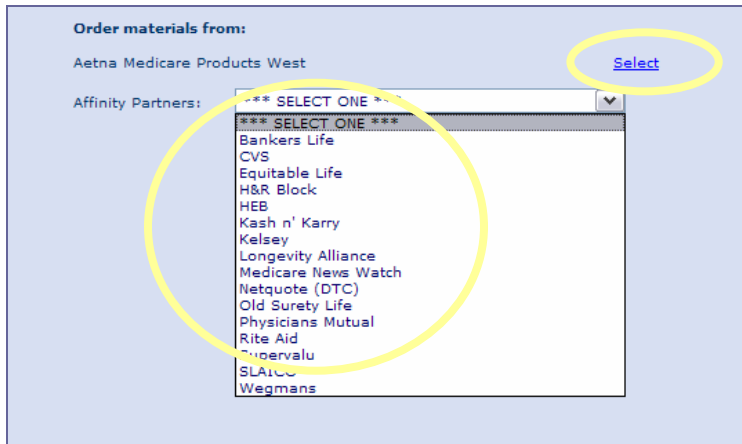
4. Select your appropriate region by clicking on the map.



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5. Choose either the region by clicking [Select](#) or Affinity Partner region by using the drop-down menu.



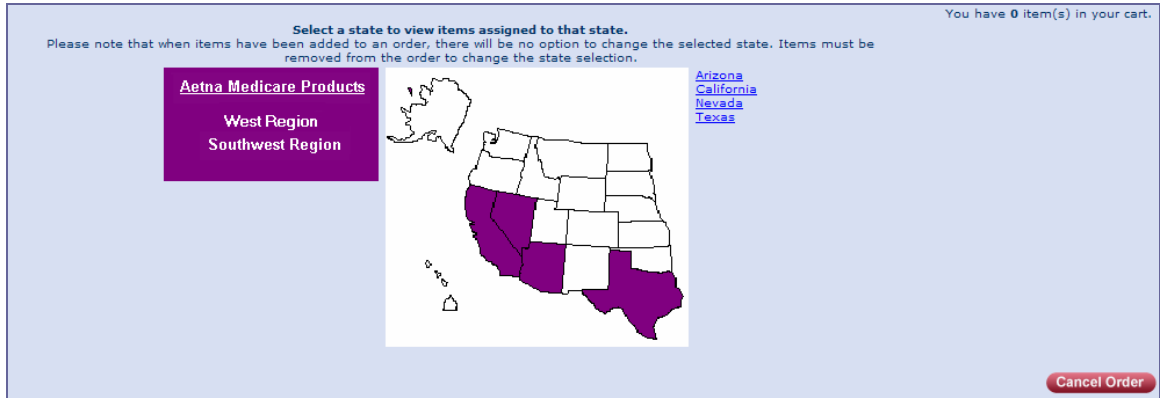
6. Confirm you have selected the correct region or Affinity Partner region and click Begin Order.



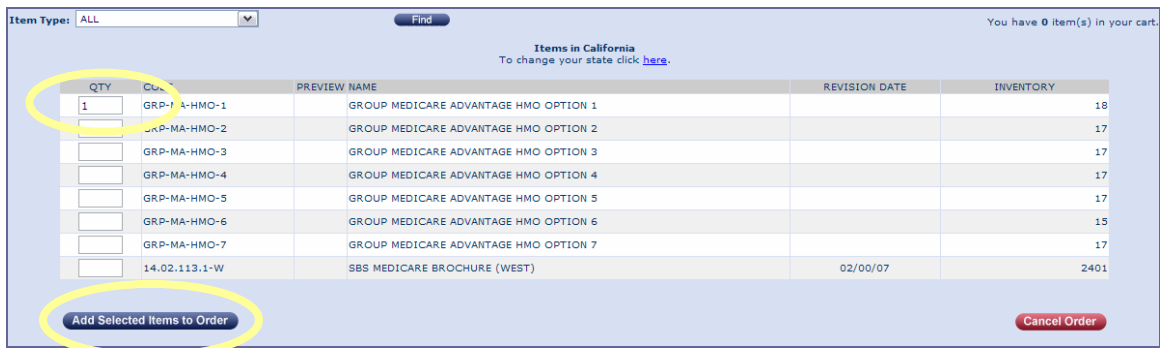
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Step	Action
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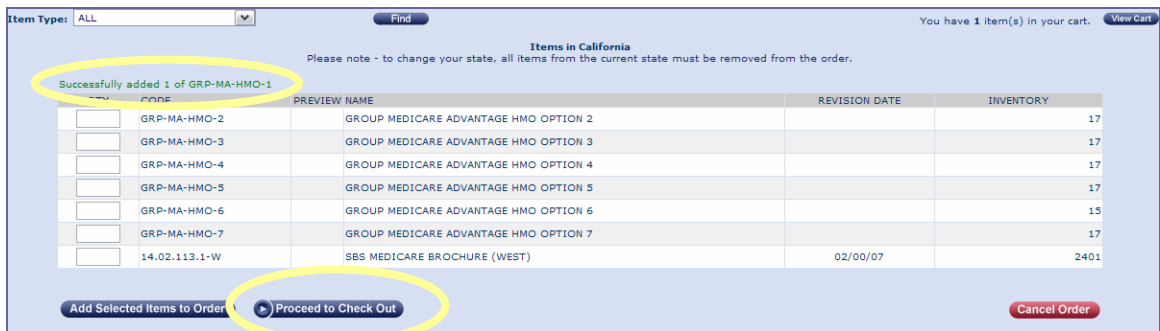
7. Select the desired states by clicking on the map. (only highlighted states can be selected)



8. Enter the quantity of each item and click **Add Selected Items to Order**.



9. Your items will show as added and you can click on **Proceed to Check Out**.



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10. Verify the items in your order and make any necessary updates. Please note components are listed below the kit.

Your cart details.

QTY	CODE	PREVIEW NAME	INVENTORY	DELETE
1	GRP-MA-HMO-1	GROUP MEDICARE ADVANTAGE HMO OPTION 1	18	<input type="checkbox"/>
1	Comp: 18.32.426.1	COVER LETTER MEDICARE HMO MA KITS	187	
1	Comp: 18.02.360.1	MEDICARE MA-PD ENROLLMENT BROCHURE	59	
1	Comp: 18.03.485.1	MEDICARE MA-PD BROCHURE INSERT	187	
1	Comp: 18.03.518.1	MEDICARE HMO SUMMARY OF BENEFITS	88	
2	Comp: GR-68205	MEDICARE HMO/PPO ENROLLMENT FORM	374	
1	Comp: 18.03.542.1	MEDICARE HMO DOC FIND FLYER	103	
1	Comp: 18.28.304.1	MEDICARE HMO DISCLOSURE	62	
1	Comp: 18.16.330.1	MEDICARE ENROLLMENT ENVELOPE	120	

Please select a minimum of one (1) Directory with your kit order. Federal Department of Labor Regulations contain specific requirements regarding the inclusion of provider lists as part of your plan's summary plan description and electronic dissemination of plan documents. To insure your plan's compliance with those requirements, contact the Federal Department of Labor or your own ERISA counsel.

Note: The above disclaimer does not apply to the Aetna Golden Medicare Plan (HMO), the Aetna Golden Choice Plan (PPO), or the Aetna Individual Medicare Supplement Plan.

11. Once the order is ready enter shipping information and click **Submit Order**.

Your broker information.

First Name: Jane Doe
Email Address: DoeJ@TestFirm.com
Firm/Agency Name: Test Firm

Please verify your shipping address information.

First Name: **MI:** **Last Name:***
Company Name:
Address:*
Address:
Address:
Zip:*
City:* **State:***
Country:
Phone: / - **Ext:**

Check this box to save this as your default shipping address.

FREQUENTLY ASKED QUESTIONS

1. Does the system include an online help feature?

The Aetna Medicare Resource Center does not include an online help feature. Please refer to this reference guide, or applicable training alerts, for assistance with system-specific tasks.
