Email signature update for Aetna Quote and Enroll

We've updated our email signature process to make it even easier for you.

New 4-step email signature process

Step 1: Apply agent signature within Aetna Quote & Enroll (eApp tool)

Step 2: Enter applicant's email address and click "send to applicant(s) for signature"

Step 3: Applicant will receive an email to review and sign the application

Step 4: Application will be automatically submitted to the home office. No further action is needed from the agent or applicant.

Step 1: Agent applies signature within Aetna Quote & Enroll (eApp tool)

- Start signature process and select "Email signature"
- Read instructions and agree to the terms and conditions
- Click "Apply agent signature"
- The message "Signature process success" indicates the agent's signature is applied

Step 2: Enter applicant's email address and click "send to applicant(s) for signature"

- Enter applicant email address and confirm email address
- Read instructions and agree to the terms and conditions
- Click "Send to applicant(s) for signature"

- In the case of multiple applicants/owners, you'll need to enter the email addresses of all parties, then click "Send to applicant(s) for signature"

Applicant - A(TEST, EAPP)

· Enter and verify the Applicant email address. Click on Send email to applicant.
· System will send the email to applicant(s) to apply their signature.
· Applicants should use the **last 4 digits of their SSN as password,** to open the application.
· Then they need to review and apply signatures to all required documents.
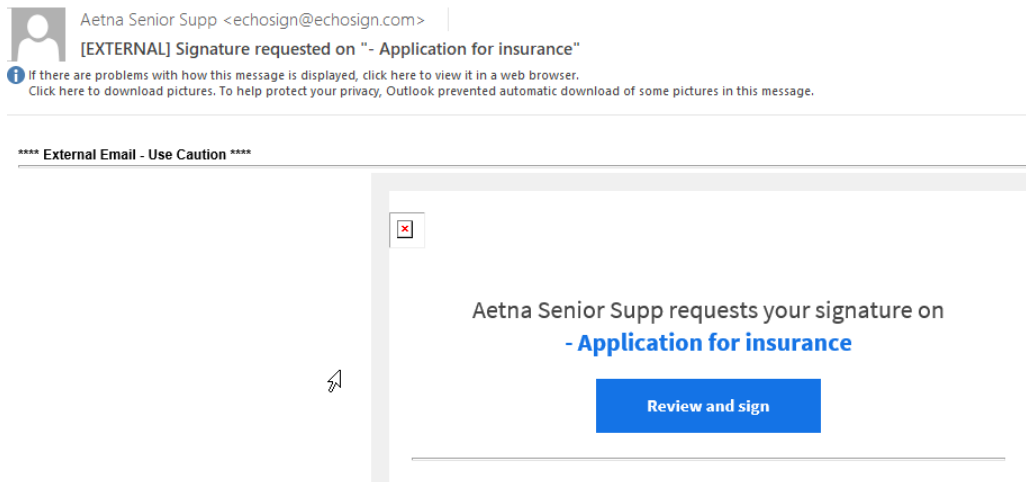
Email Address

abcd@gmail.com

Confirm Email Address

abcd@gmail.com

☑ I agree to terms and conditions

Send to applicant(s) for signature

Step 3: Applicant will receive an email to review and sign the application

- Your client will receive an email from Adobe, our e-signature partner echosign@echosign.com with subject "Signature requested on - Application for insurance"

Aetna Senior Supp <echosign@echosign.com>
[EXTERNAL] Signature requested on "- Application for insurance"
If there are problems with how this message is displayed, click here to view it in a web browser.
Click here to download pictures. To help protect your privacy, Outlook prevented automatic download of some pictures in this message.

**** External Email - Use Caution ****

Aetna Senior Supp requests your signature on
- Application for insurance

Review and sign

- Applicant clicks on "Review and Sign"
- Applicant must enter a password (the last 4 digits of their SSN)
- Applicant can review and sign the application PDF
- Once signature is completed, applicant(s) will receive email from echosign@echosign.com, with subject – *"Completed: - Application for insurance".* (Applicant will have option to download the application from there)
- This email indicates signature process is complete and the application has been sent to Aetna

Step 4:

- When applicant(s) complete signature, the application will be submitted to the home office.
- **NOTE:** In the case of multiple applicants, applicant-A will receive the email first. Once signature is completed by applicant-A, applicant-B will receive an email. When both applicants complete signature, application will be submitted to the home office.
- No further action is needed from the agent or applicant.

Frequently Asked Questions

How do I know that my client received the application?

In the Aetna Quote & Enroll tool, go to "My Cases." You can see your application in "Signature" status. This indicates that we sent the application to your client. Note that sometimes there may be a delay in your client receiving the email.

How do I know if Aetna received my client's application?

There are multiple ways you see the status of your application:

1. **"My Cases" on Aetna Quote and Enroll**
   a. Go to "My Cases"; click on "Open" and you can see the submission status and the policy-number.
   b. If application qualifies for quick decision Underwriting, you will see the decision there.

Submitted policies:

Final Expense

Accendo Insurance Company

| PANDER PAGE | Preferred Level Plan | Monthly | 2020-09-01 | ACC6206779 | 📄 PDF | Submission Successful | $112.88 |

🟢 *Congratulations, this applicant is approved for coverage. We are now creating the policy documents. You can view the enrollment tracker on www.aetnaseniorproducts.com to see the real time status.*

2. **Email alerts**
   a. Sign up for our "application submission alert" on **AetnaSeniorProducts.com**, under "Alerts and Settings" on the main page of the website
   b. Once we receive your client's application, you will get an email notification instantly

Schedule Pages for applications submitted	ON ⬤
Applications that are declined	ON ⬤
Applications that are declined	ON ⬤
Applications that have been submitted/received	ON ⬤

3. **Enrollment tracker**
   a. Login to **AetnaSeniorProducts.com**. You can check the policy number listed on the "Enrollment Tracker" link on the main page of the website

Enrollment Tracker

Click on the purple "Check Auto UW" button to get the automated underwriting decision – Approved, Routed to UW, Decline. Refresh this page by pressing the F5 key on your keyboard to see the updated decision. You may do this multiple times until the underwriting decision box turns either red, yellow, or green, this can take up to 5 minutes.

📄 Enrollment Tracker - Agent Guide

🅧 Download Excel

| App Status ALL ⌄ | State ALL ⌄ | Product ALL ⌄ | Agent ALL ⌄ | Policy Number acc6206779 | GO |

Showing 1 to 1 of 1 entries   Results per page : 10 ⌄

	Submitted date	Policy number	Member name	Enrollment status	Issue state	Product	Plan	Effective date	Writing Agent	Message	Application pdf
➕	2020-08-21	ACC6206779	Pander Page	Approved - Quality check	AR	Final Exp	FE Level	2020-09-01	GNW0009894 - Christopher Westfall	✉️ Create 👁 View	📄 PDF

Will I be able to resend the application to my client (for example: if my client cannot find the first email that I sent)?

If the applicant has not completed the signature and sent it to the home office, you can cancel an email signature in Aetna Quote and Enroll. You would need to sign the application again and then send it to applicant again.