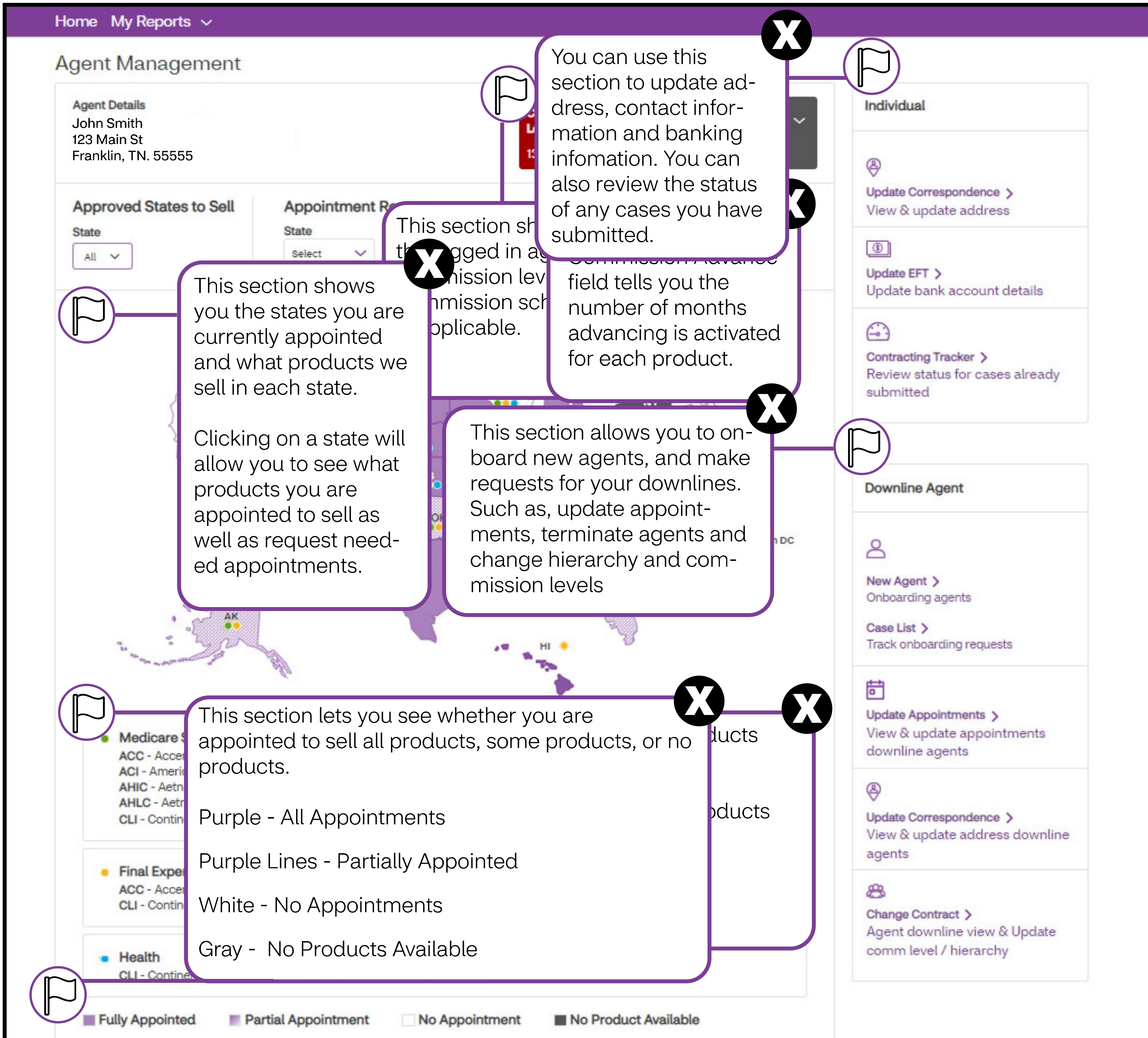
Agent Management Tool
GA & MGA Reference Guide

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 request appointments, update banking and address information, request commission level and hierarchy changes, terminate downlines, and review the status of any request made using the tool. 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.

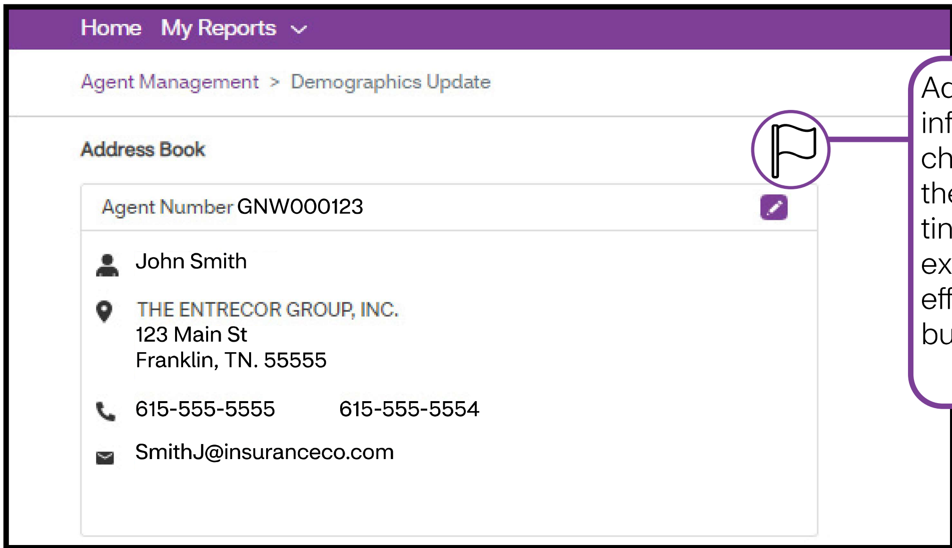


Individual

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

Update Correspondence (Individual)

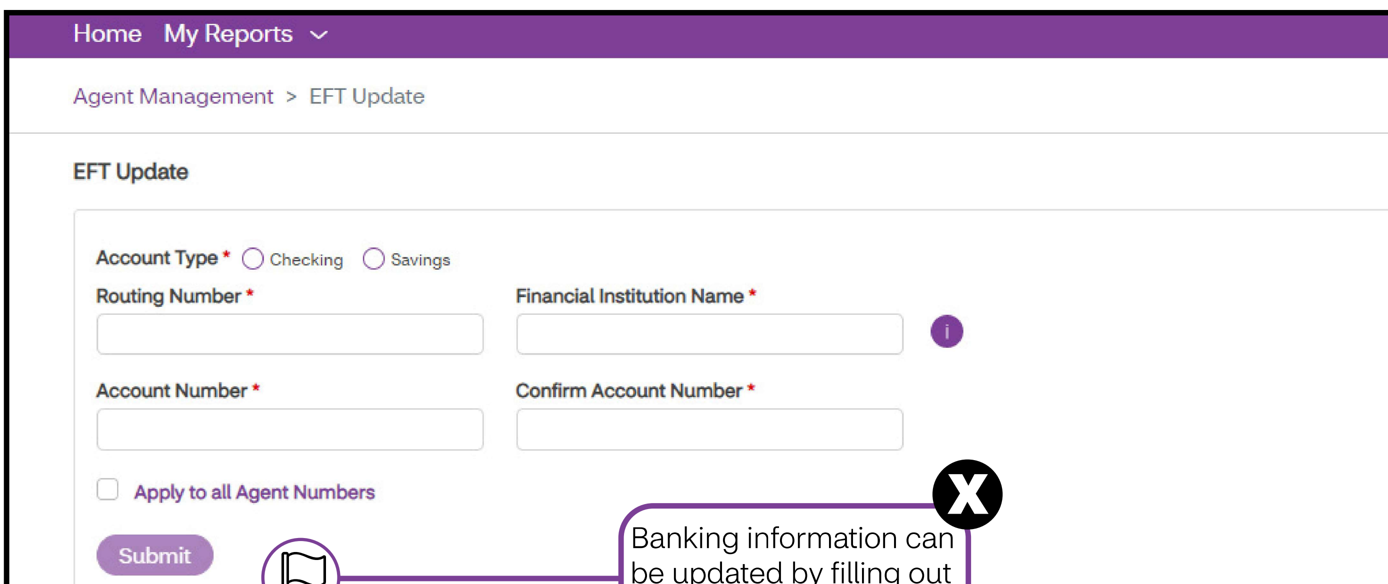
By clicking on 'Update Correspondence' under inidividual from the Agent Management Home Screen, you will be able to update your address and contact information.



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.

Update EFT

By clicking on 'Update EFT' under inidividual from the Agent Management Home Screen, you will be able to update your EFT infomation.



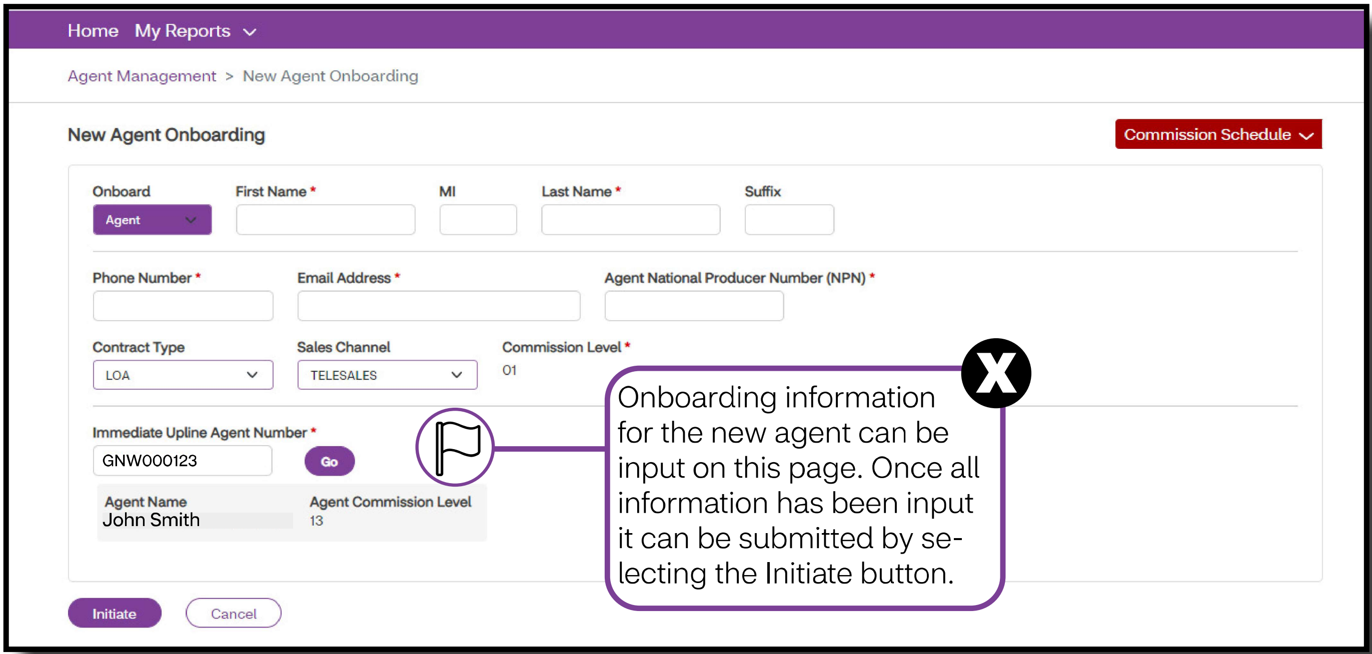
Banking information can be updated by filling out and submitting the form. Changes can be expected within 5 business days

Downline Agents

If you need to edit information for your downline agents that can be done under the Downline Agent section of Agent Management.

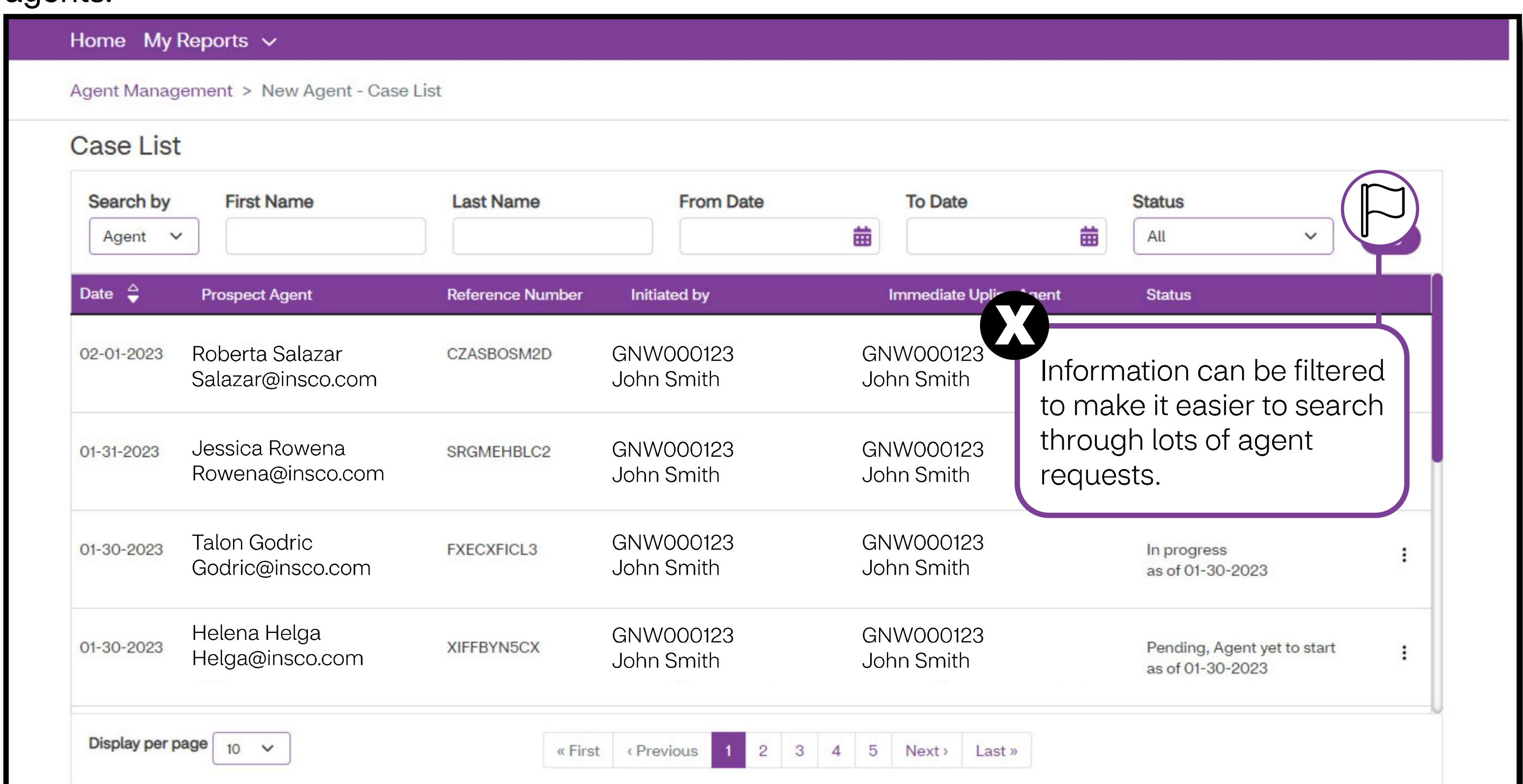
New Agent Onboarding

By clicking on ‘New Agent’ under the ‘Downline Agents’ section of the Agent Management Home Screen, you will be able to start the onboarding process for new agents.



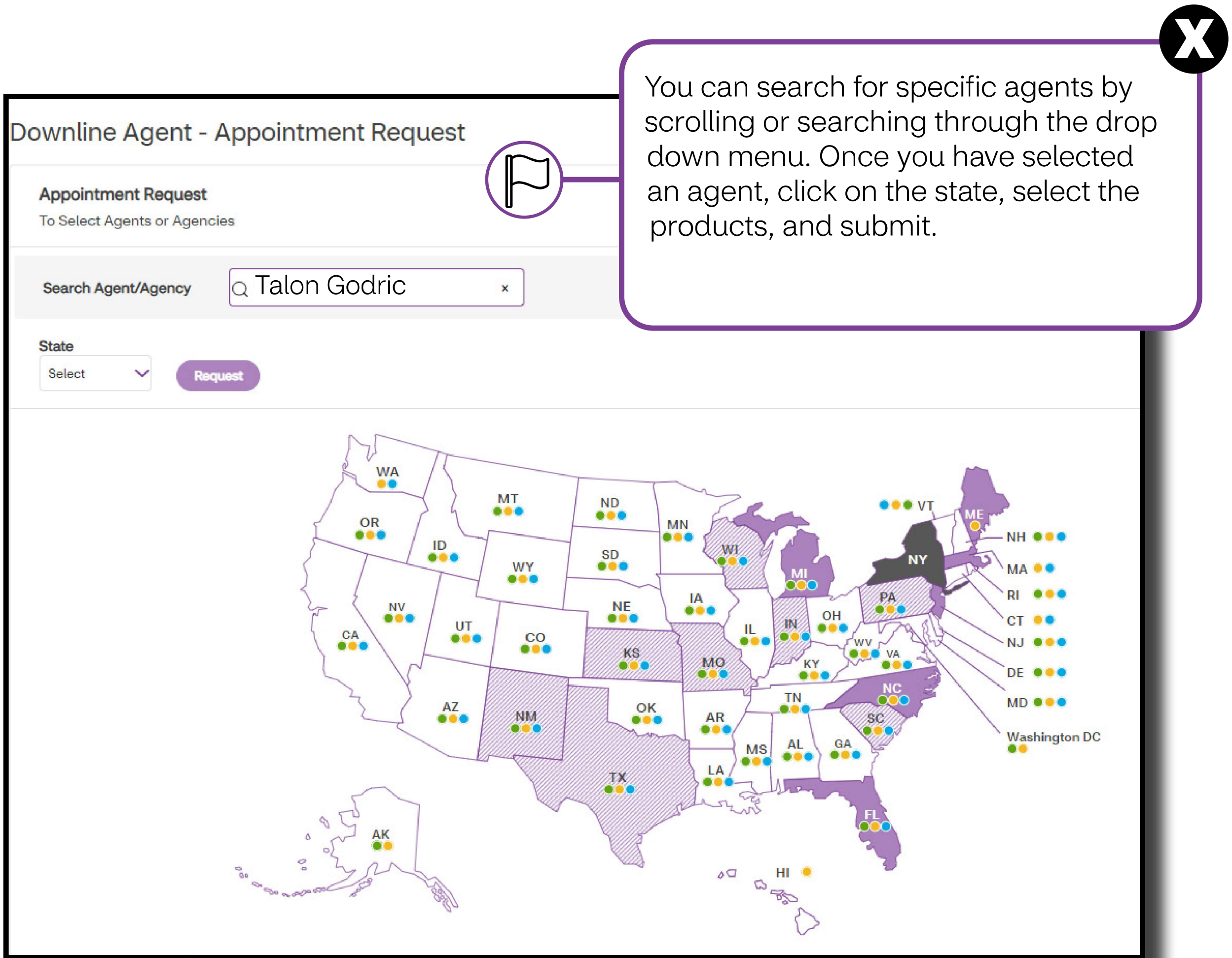
Case List

Clicking on ‘Case List’ underneath Downline Agents will allow you to see the onboarding status of agents.



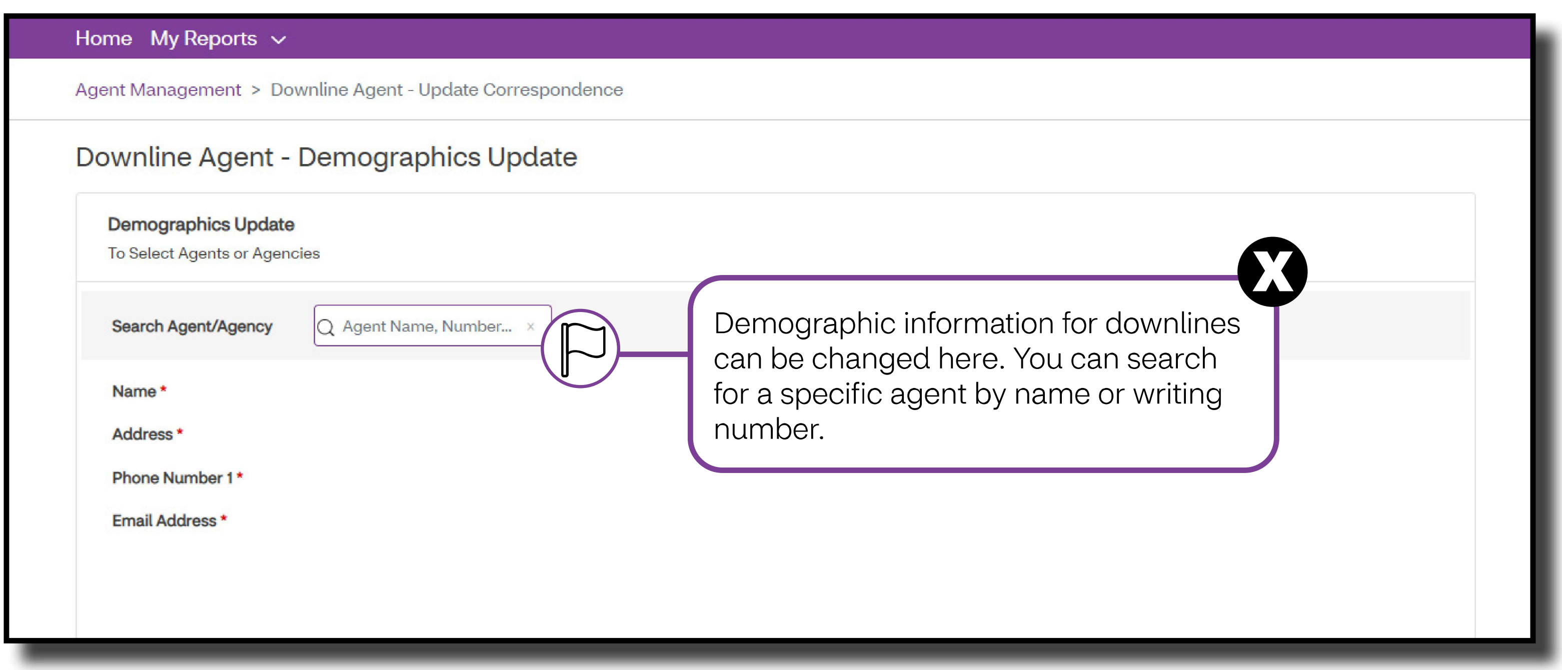
Update Appointments (Downline Agent)

By clicking on ‘Update Appointments’ under Downline Agents from the Agent Management Home Screen, you will be able to update appointments for your downline agents.



Update Correspondence (Downline Agent)

By clicking on ‘Update Correspondence’ under Downline Agents from the Agent Management Home Screen, you will be able to update your downline agent’s address and contact infomation.



Change Contract

Under the Change Contract section you will be able to request commission level changes, set up hierarchy changes, and terminate agents. Once changes have been requested you will be able to view the status in the contracting tracker section.