


Agent Management Tool GA & MGA Reference Guide

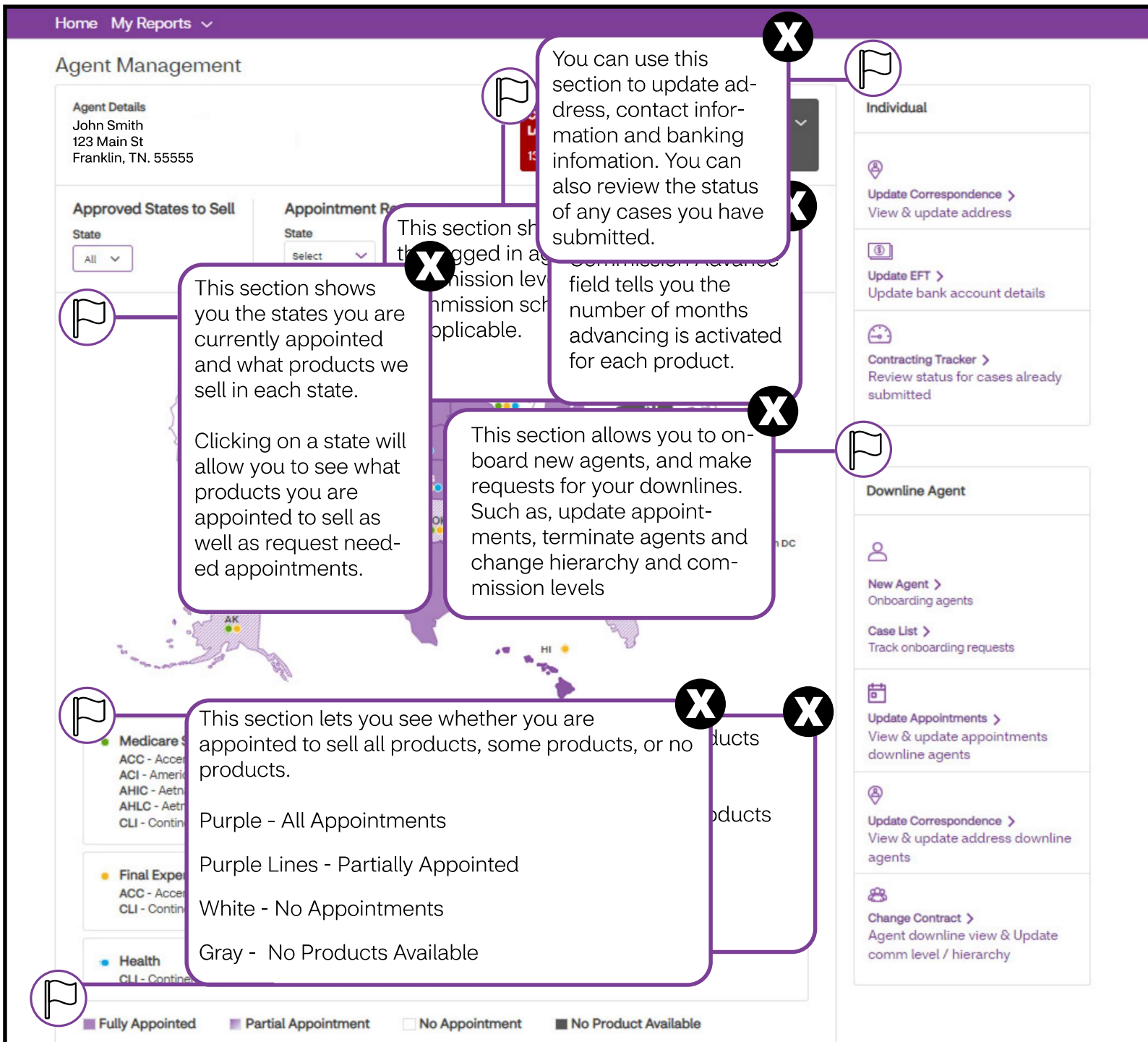


Our goal is always to develop tools and resources that will help agents grow their business and support their clients. Over the next several months we will be rolling out various updates to the Aetna Senior Products Website. The first of these are changes to the Agent Maintenance Tool, which will now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



The screenshot shows the Agent Management Home Screen with the following sections and callouts:

- Agent Details:** John Smith, 123 Main St, Franklin, TN, 55555.
- Approved States to Sell:** A map of the United States with callout: "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."
- Appointment Request:** A callout: "This section allows you to onboard new agents, and make requests for your downlines. Such as, update appointments, terminate agents and change hierarchy and commission levels."
- Commission Level / Advance Field:** A callout: "You can use this section to update address, contact information and banking information. You can also review the status of any cases you have submitted."
- Legend:** A callout: "This section lets you see whether you are appointed to sell all products, some products, or no products. Purple - All Appointments, Purple Lines - Partially Appointed, White - No Appointments, Gray - No Products Available."
- Individual:** Includes "Update Correspondence > View & update address" and "Update EFT > Update bank account details".
- Downline Agent:** Includes "New Agent > Onboarding agents", "Case List > Track onboarding requests", "Update Appointments > View & update appointments downline agents", "Update Correspondence > View & update address downline agents", and "Change Contract > Agent downline view & Update comm level / hierarchy".

Navigation: Home | My Reports

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.

Update EFT

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

Home My Reports ▾

Agent Management > EFT Update

EFT Update

Account Type * Checking Savings

Routing Number * Financial Institution Name *

Account Number * Confirm Account Number *

Apply to all Agent Numbers

Submit

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.

Home My Reports ▾

Agent Management > New Agent Onboarding

New Agent Onboarding Commission Schedule ▾

Onboard Agent ▾ First Name * MI Last Name * Suffix

Phone Number * Email Address * Agent National Producer Number (NPN) *

Contract Type LOA ▾ Sales Channel TELESALES ▾ Commission Level * 01

Immediate Upline Agent Number * GNW000123 Go

Agent Name John Smith Agent Commission Level 13

Initiate Cancel

Onboarding information for the new agent can be input on this page. Once all information has been input it can be submitted by selecting the Initiate button.

Case List

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

Home My Reports ▾

Agent Management > New Agent - Case List

Case List

Search by Agent ▾ First Name Last Name From Date To Date Status All ▾

Date	Prospect Agent	Reference Number	Initiated by	Immediate Upline Agent	Status
02-01-2023	Roberta Salazar Salazar@insco.com	CZASBOSM2D	GNW000123 John Smith	GNW000123 John Smith	
01-31-2023	Jessica Rowena Rowena@insco.com	SRGMEHBLC2	GNW000123 John Smith	GNW000123 John Smith	
01-30-2023	Talon Godric Godric@insco.com	FXECXFICL3	GNW000123 John Smith	GNW000123 John Smith	In progress as of 01-30-2023
01-30-2023	Helena Helga Helga@insco.com	XIFFBYN5CX	GNW000123 John Smith	GNW000123 John Smith	Pending, Agent yet to start as of 01-30-2023

Display per page 10 ▾

« First < Previous 1 2 3 4 5 Next > Last »

Information can be filtered through lots of agent requests.

Update Appointments (Downline Agent)

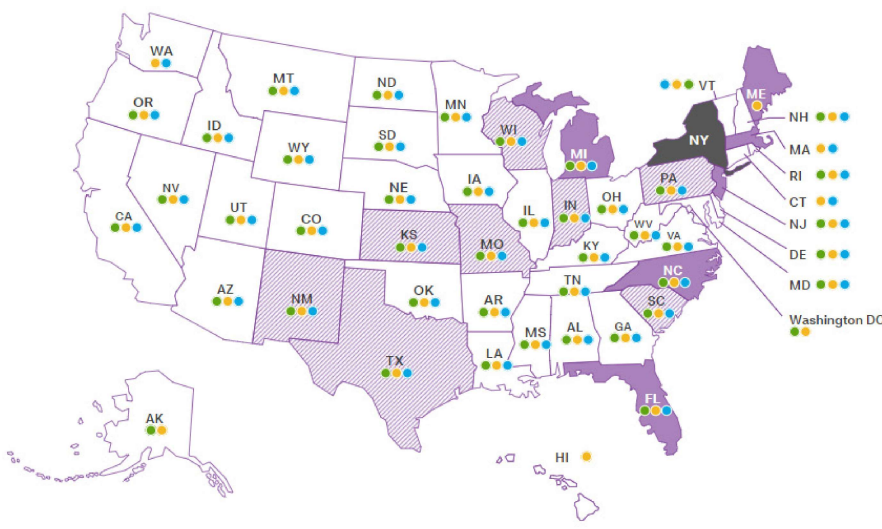
By clicking on 'Update Appointments' under Downline Agents from the [Agent Management Home Screen](#), you will be able to update appointments for your downline agents.

Downline Agent - Appointment Request

Appointment Request
To Select Agents or Agencies

Search Agent/Agency

State
Select



The screenshot shows a web interface for updating appointments for downline agents. At the top, there's a title 'Downline Agent - Appointment Request' and a subtitle 'Appointment Request To Select Agents or Agencies'. Below this is a search bar labeled 'Search Agent/Agency' with the text 'Talon Godric' entered. Underneath the search bar is a 'State' dropdown menu set to 'Select' and a purple 'Request' button. The main part of the interface is a map of the United States with colored dots (green, yellow, blue, purple) placed on various states to indicate agent locations. A callout box with a flag icon points to the search bar, and another callout box with an 'X' icon points to the map.

You can search for specific agents by scrolling or searching through the drop down menu. Once you have selected an agent, click on the state, select the products, and submit.

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 information.

Home My Reports ▾

Agent Management > Downline Agent - Update Correspondence

Downline Agent - Demographics Update

Demographics Update
To Select Agents or Agencies

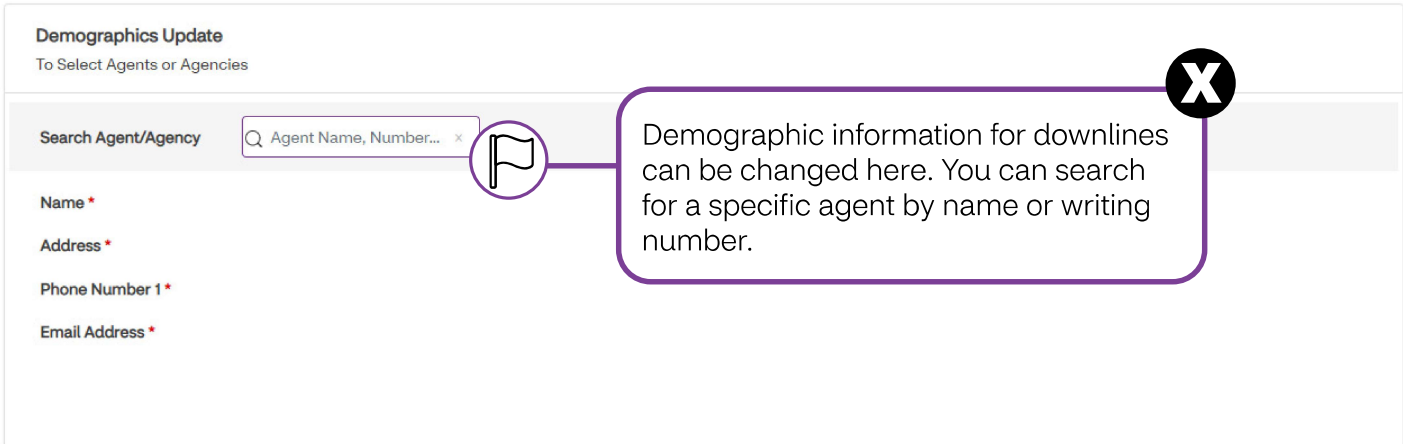
Search Agent/Agency

Name *

Address *

Phone Number 1 *

Email Address *



The screenshot shows a web interface for updating the demographics of a downline agent. At the top, there's a navigation bar with 'Home' and 'My Reports' (with a dropdown arrow). Below that is a breadcrumb trail: 'Agent Management > Downline Agent - Update Correspondence'. The main title is 'Downline Agent - Demographics Update' with a subtitle 'Demographics Update To Select Agents or Agencies'. There's a search bar labeled 'Search Agent/Agency' with the text 'Agent Name, Number...' entered. Below the search bar are four required fields: 'Name *', 'Address *', 'Phone Number 1 *', and 'Email Address *'. A callout box with a flag icon points to the search bar, and another callout box with an 'X' icon points to the form fields.

Demographic information for downlines can be changed here. You can search for a specific agent by name or writing number.

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.

Downline Agent - View

Select the Agents or Agencies
To Update Commission Level or Hierarchy

Selectquote Insuran... > Selectquote Insurance Svcs Team Filter by All Search Agent Name, Number...

Change Commission Level Change Hierarchy Terminate Agent

Agent/Agency Number	Agent/Agency Name	Resident State	Commission Level	Terminate/Overall Downline
<input type="checkbox"/> 16294164	Roberta Salazar	MO	01	None
<input type="checkbox"/> 16695965	Helena Helga	MO	01	None
<input type="checkbox"/> 16698902	Talon Godric	KS	01	None

Display per page 10

« First < Previous 1 2 3 4 5 Next > Last »

Commission levels can be updated by selecting the agent you want changed and then clicking on the "Change Commission Level" button.

Agents can be terminated by selecting the agent you would like to terminate and selecting the 'Terminate Agent' button.

