

## 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



#### Agent signature

##### Instructions

Apply your agent signature by clicking on the "I accept" checkbox and "Apply Agent signature". Once Applicant (and Owner if applicable), electronic signatures are completed, the application will be automatically submitted to home office.

I agree to terms and conditions

Apply agent signature

**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 (BRITTNEY TEST)

- 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 \*

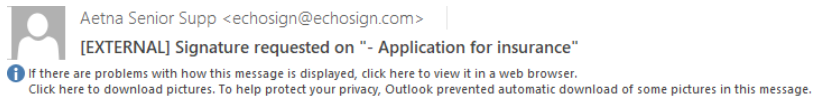
abcd@gmail.com

I agree to terms and conditions

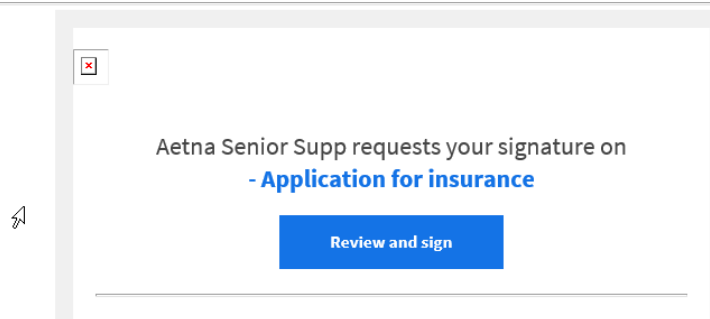
Send to applicant(s) for signature

### 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](mailto:echosign@echosign.com) with subject "Signature requested on - Application for insurance"



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



- 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](mailto: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.

State: Select | Search by applicant name: BRITTNEY TEST | Status: Select | Start Date: MM/DD/YYYY | End Date: MM/DD/YYYY | Search

#### My Cases

Showing all 2 cases of last 3 months

Last 7 days

Last 14 days

In Progress

Pending Signature

	Start Date	Primary Applicant Name	State	Status	Actions
	2021-08-24 15:06:24.52	BRITTNEY TEST	TN	Signature	Open


### 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
<p> Congratulations, this applicant is approved for coverage. We are now creating the policy documents. You can view the enrollment tracker on <a href="http://www.aetnaseniorproducts.com">www.aetnaseniorproducts.com</a> to see the real time status.</p>							

## 2. Email alerts

- Sign up for our “application submission alert” on **AetnaSeniorProducts.com**, under “Alerts and Settings” on the main page of the website
- Once we receive your client’s application, you will get an email notification instantly

Schedule Pages for applications submitted	<input checked="" type="checkbox"/>
Applications that are declined	<input checked="" type="checkbox"/>
Applications that are declined	<input checked="" type="checkbox"/>
Applications that have been submitted/received	<input checked="" type="checkbox"/>

## 3. Enrollment tracker

- 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
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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	<a href="#">ACC6206779</a>	Pander Page	Approved - Quality check	AR	Final Exp	FE Level	2020-09-01	GNW0009894 - Christopher Westfall	 	

## 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.