

# New phone-from-home enrollment option

During these unprecedented times, it's important that all of us do our part to help slow the spread of the coronavirus (COVID-19). And this means staying at home as much as possible. Fortunately, we offer a variety of remote-selling tools you can use to continue supporting your clients who want to enroll.

**For the duration of this health crisis, we're offering an additional remote-selling tool, called phone from home.** With this option, we'll assist with telephonically enrolling your clients in their selected Allina Health | Aetna Medicare Advantage plan, and you can earn commission for the sale.

Please note that your client must provide your name and National Producer Number (NPN) during the phone-from-home enrollment process for you to receive credit.



## How to use the phone-from-home enrollment option

<b>Step 1</b>	Complete a sales consultation with your client. <ul style="list-style-type: none"><li>• Review all plan options with them.</li><li>• Ensure they have selected a plan and are ready to enroll.</li></ul>
<b>Step 2</b>	Prepare your client for enrollment. <ul style="list-style-type: none"><li>• Ensure they have your first and last name and NPN. <i>(Your client must provide these items during the phone-from-home enrollment process for you to be listed as the writing agent.)</i></li><li>• Ensure they have their Medicare ID card.</li><li>• Give them the enrollment phone number.</li></ul>
<b>Step 3</b>	Next, your client can contact the Allina Health   Aetna telephonic broker enrollment team at <b>888-878-4090</b> . We're available Monday - Friday, 8 A.M. – 8 P.M. EST. On the call, an Allina Health   Aetna telephonic enrollment agent will ask your client to: <ul style="list-style-type: none"><li>• Provide their agent's name and NPN. <b>IMPORTANT-</b> This information is required for you to be listed as the writing agent.</li><li>• Confirm that their agent completed a benefit presentation.</li></ul> Next, the telephonic enrollment agent will gather the beneficiary's information to complete the application and will review necessary disclaimers.

## FAQ

### How long does the phone-from-home enrollment process take?

About 15-20 minutes.

### Can I warm-transfer my clients to this telephonic enrollment line instead of having them call directly?

You may warm-transfer your clients *if your phone has this capability; but please note that most phones do not*. Remember, the sales agent is required to drop from the call once the enrollment application begins. *If your phone does not have this capability, you risk disconnecting all callers when you hang up.*

### How will I receive credit for these enrollments?

We will use your name and NPN to attribute credit for these enrollments. As a result, your clients must provide these items during the call. If they do, you will be listed as the writing agent for the sale, and you will see the enrollment in your Producer World reports once it is fully processed. If they cannot provide your name and NPN, but want to proceed with enrolling in a plan, you will not be listed as the writing agent.

### What other remote-selling tools are available?

- **E-kits:** With e-kits, your clients can enroll in a plan online—from the comfort and safety of their own home—and still retain you as their writing agent. To use this tool, you must have access to the Ascend Virtual Sales Office app. It works with any Windows-based laptop or iPad mobile device. Once in the Ascend app, click “Email a Quote” to generate an e-kit email to your client. The e-kit email contains all required plan documents and includes a link to enroll online.
- **RATE:** With the Remote Agent Telephonic Enrollment (RATE) tool, you can enroll your clients by phone. To use this tool, you must have an iPad. You also need access to the Ascend app and must complete a short compliance training and quiz.

## Questions?

We're here to help. If you have any questions about our remote-selling tools, please contact your Allina Health | Aetna Medicare broker manager.



Allina Health | Aetna is the brand name used for products and services provided by Allina Health and Aetna Insurance Company. Health plans are offered, underwritten or administered by Allina Health | Aetna. Allina Health | Aetna is an affiliate of Aetna Life insurance company and its affiliates (Aetna). Allina Health | Aetna has sole responsibility for its products and services. Aetna provides certain management services to Allina Health | Aetna.

Prior to engaging in the sale of Allina Health | Aetna Medicare products, producers must be ready to sell, which means certified, contracted, licensed in the applicable states, and appointed by Aetna in accordance with state law. As permitted in certain states, Aetna will order appointments after the first sale. This communication is intended for use by brokers only and is not intended for distribution to Medicare beneficiaries. Any publication or distribution of this communication to unauthorized recipients without Aetna's approval is prohibited.