

## On your mark, get set...go!

### Get ready to sell Aetna Funding Advantage<sup>SM</sup>

Our fastest growing Small Group product is coming to your market. Use this guide to make sure you're ready to sell Aetna Funding Advantage (AFA) to groups with 5-50 employees. With client savings of up to 40%\*, an online quoting, selling, enrollment and ongoing administration platform, and tons of value adds, you're not going to want to miss out on AFA.

#### Step 1



#### Become an Aetna producer

To sell AFA, you need to be licensed and appointed with Aetna. Don't worry, it's easy. And comes with perks like competitive compensation, our AFA broker bonus program, and access to marketing materials and tools. To become appointed with Aetna, complete our [online application](#) on aetna.com. Make sure you indicate Small Group as one of the lines of business you'll be selling. You can also view or download our [Producer Agreement](#) on aetna.com.

*Helpful tip: If you aren't licensed yet, we offer a discount through Kaplan on licensing exam prep. Visit [kfeducation.com/portal](http://kfeducation.com/portal) and enter the Aetna portal code "Producer".*

#### Register in ProducerWorld®

You'll need access to ProducerWorld in order to quote and sell AFA. If you don't have a ProducerWorld username, you can register in the Producer section of [aetna.com](http://aetna.com). Hover over the log in section and click on [Register](#).

*Note: To register, you must be the principal of your agency and licensed and appointed OR be granted access by the principal (or the designee of the principal) of your agency.*

#### Step 2



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\*Compared to an ACA plan. Actual savings vary depending on claims experience.

Aetna is the brand name used for products and services provided by one or more of the Aetna group of subsidiary companies, including Aetna Life Insurance Company and its affiliates (Aetna). Aetna Funding Advantage (AFA) plans are self-funded, meaning the benefits coverage is offered by the employer. Aetna Life Insurance Company only provides administrative services and offers stop loss insurance coverage to the employer.

## Step 3



### Set up permissions in ProducerWorld®

Springboard relies on data in ProducerWorld to map you to your clients and contact information. To allow Springboard access to your ProducerWorld data, you'll need to grant permissions. First, your principal (or the designee of your principal) will need to set you up with quoting and enrollment/billing access (select the first option on questions 2 and 3 in the privileges screen).

Here's how they do it:

*Note: If you are registered as the principal or already a designee, you can skip this part.*

1. Go to [Manage Access for Others](#) link on left menu
2. Choose [Add/Edit Delete Firm Employee](#) Tab
3. Click on [Designee Manage Access](#)
4. Current Designee Privileges by Location will appear
5. Click on the [Firm Location Name](#) (if multiple, find the correct one to correspond to broker location)
6. Look for the broker's name and update their privileges by clicking the [Privileges](#) link (you can select [Add Employee](#) if broker is not listed)
7. Select the first radio button under [Small Group Quoting and Renewal Access](#) and [Enrollment/Billing Access](#)

### Step 4: Register in Springboard Marketplace

Once you are set up in ProducerWorld, it's easy to register in Springboard. Go to the [Springboard homepage](#) and click on [First Time Small Group Broker](#) under the log in fields. Follow the prompts to register with your ProducerWorld username, last name and business zip code. Through this process you will create a secure password. You can use this information to log in to Springboard moving forward. If you need helping logging in, you can call the support number listed in the help section of the Springboard log in page.

## Step 4

