



Aetna[®] Small Group Producer program

CALIFORNIA

2023

Get ready to earn more

It's simple. Just sell new Aetna Small Group fully insured and Aetna Funding Advantagesm business plans to groups in California with 1-100 eligible employees. When you do, you'll be eligible to earn additional producer credits.

Getting started — about the program

- For cases with effective dates from January 1, 2023 through December 31, 2023, you can earn:
 - \$50 for each new enrolled employee when you sell under 75 total enrolled employees.
 - \$100 for each new enrolled employee when you sell 75 or more total enrolled employees.
 - Producers are also eligible for additional credits for new dental or vision subscribers when sold alongside medical.
- For new business fully insured and Aetna Funding Advantage medical sales only.
- For groups with 1-100 eligible employees in California.
- Credits will be paid by the end of the second quarter of 2024.

Reap your rewards

Total Enrolled Employees	Credit per Enrolled Employee
1 - 74	\$50
75+	\$100

In addition, when producers sell Dental or Vision with a new Medical case, they will earn:

- \$8 per new Dental subscriber
- \$2 per new Vision subscriber

Example: A producer who sold 75 total enrolled employees, 30 of whom are enrolled in a Dental product, would earn \$7,740 total credits (75 x \$100 + 30 x \$8).
For illustrative purposes only.

Ready to earn more? Contact your Aetna sales professional.

Aetna is the brand name used for products and services provided by one or more of the Aetna group of companies, including Aetna Health of California Inc., Aetna Life Insurance Company and its affiliates (Aetna).

[Aetna.com](https://www.aetna.com)

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Some program guidelines to keep in mind

Program term

- Effective dates January 1, 2023 through December 31, 2023.

Eligible participants

- Must be licensed and appointed (where required) and have an in-force Producer Agreement.
- General agents are not eligible to participate.

Eligible business

- New fully insured and Aetna Funding Advantage business with 1-100 eligible employees in California.
- Includes both commissionable and non-commissionable business.
- The relationship between the producer and plan sponsor must be documented to our satisfaction.
- Must be new business to Aetna (conversions are not eligible).
- The primary producer is eligible for payment on business sold through a general agent.
- Cases must be situated in the state of California.

Exclusions

- Professional Employee Organization plans, Medicare plans, Aetna Affordable Health ChoicesSM plans, Aetna Student HealthSM plans and the Aetna Signature Administrators[®] network are excluded from this program.

Disclosures

- Producer is required to provide advanced written disclosure to customers on the nature of the compensation that the producer may be entitled to receive from us.
- Credits outlined in this document are not charged to the customer's experience-rated contracts but will be disclosed in accordance with our producer compensation disclosure policy.
- More details can be found by accessing our standard Producer agreement at <https://www.aetna.com/insurance-producer/become-appointed-with-aetna.html>

Payments

- Credits will be paid by the end of the second quarter of 2024.
- Cases must be active at the end of the program year to be eligible for payment.
- Credits will be reported as taxable income.
- Payments will be submitted under one tax identification number (TIN). We will not split payments to multiple brokers or TINs.
- Any disputes about payments must be received in writing within 90 days of payment release.

Final determinations

- This program is offered at our sole discretion and we can be terminate or modify it at any time and without notice. Any subsequent program is at our discretion. We may modify programs and compensation to comply with state law, regulations or approvals.
- Our records determine producer's final results and will be the only basis used for determination of qualification, calculation and payment of credits. Our decisions will be final.

Engagement credit guidelines

To receive engagement credits or an engagement credit payment you must provide at least one of the following services:

- Electronic enrollment submission.
- Full access to claims data from current/incumbent carrier.
- Access to plan sponsor's management team to help facilitate stronger employee engagement.
- Member assistance with plan selection and cost estimator or access to cost and quality-of-care decision support tools such as the Aetna Personal Health Record, Simple Steps to a Healthier Life[®] program, Aetna SmartSourceSM search tool, an online provider search function and a cost estimator tool to name a few.

This material is for informational purposes only. The interpretation, application and administration of the provisions of the programs included in this publication shall be solely determined by Aetna, and its decision shall be final. For specific rules and more information about the life and disability schedules, New Sales Credit program or Retention Credit program, contact your Aetna sales representative. Information is believed to be accurate as of the production date; however, it is subject to change. For more information about Aetna plans, refer to Aetna.com.