Agent of Record (AOR) Retention Policy

Your Value

We value the critical role you play in helping your clients understand their plan options and enroll in a plan that best meets their needs.

Our Promise

Our Agent of Record (AOR) retention policy reflects our ongoing commitment to you: **If your client enrolls in a new "like" plan, we will maintain your AOR status regardless of how they enroll** - by phone, online, by paper or directly with you.

Working Together

In member mailings, we will encourage members to **contact their agent for assistance first.**

If members choose to call Member Services or Aetna Telesales, we'll encourage those with an AOR to contact their agent for support. If they wish to proceed, we will assist them, **and you will remain the AOR.**

AOR Retention Conditions and Expectations

- You must be **ready-to-sell** at the time of the plan change.
- **AOR retention only applies to like-to-like plan changes** (e.g., MA-only, MAPD, or SNP). It does not apply when changing between product types (e.g., Individual/Family → MA, Med Supp → MA, or PDP → MA/MAPD). In those cases, you must submit a plan change to remain the AOR.
- If your client **enrolls with another agent, your AOR status will not be retained.**
- If your client's plan is nonrenewing effective December 31, and your client enrolls in a new plan after December 31, you must initiate the plan change to remain as the AOR.

Upcoming change to member-initiated AOR requests

Beginning September 1, **members will no longer be able to request an AOR change by calling Member Services.** Members who want to change their AOR must submit their request to directly to Aetna Medicare Broker Services through one of the following methods:

- Signed letter (handwritten or typed) mailed to: 620 Epsilon Drive, Pittsburgh, PA 15238
- Email: brokersupport@aetna.com

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