

New business checklist

California 1 - 100 Full-Time Equivalent Employees

It's so easy

To help ensure the underwriting of your case is quick and easy, we are providing this simple checklist

Enrollment forms, eList Tool and Underwriting Guidelines are all available on Producer World at <https://www.aetna.com/producer/SmallGroup/>

- 1. Employer Application**
- 2. Employee Applications – Application or eList Tool**
 - **Application** for eligible employees enrolling or waiving health coverage.
 - Waivers may be submitted in a separate excel waiver listing with the reason for waiving included.
 - **eList Tool**
 - Must have macros enabled prior to entering data and completed in full.
 - Do not amend the eList Tool format in any manner.
 - When you use the tool, do not send the employee enrollment forms. All the required information must be entered into the eList Tool.
- 3. Copy of Initial Premium check payable to Aetna or ACH Form**
 - ACH form- the form must be fully completed including the amount of the ESTIMATED PREMIUM. Payment will be deducted when case is approved.
 - Payment by check - submit a COPY of the check with the group. Do not send the check to Aetna until the group is approved. Upon approval you will be notified to send the check to the Bank lockbox.
- 4. Wage and Tax Statement**
 - A Quarterly Wage and Tax Statement (QWTS) must be provided for the following groups:
 - 1 to 19 enrolled employees
 - 20 to 100 employees with:
 - no current health coverage
 - more than 10% of the employees are located outside of California
 - more than 20% are COBRA/CalCOBRA enrollees
 - associated, affiliated, multiple companies
 - Sole proprietors, partners, and officers not listed on the QWTS are not required to submit tax documents; underwriter may request if needed.
 - There must be at least one enrolled W-2 employee who is not an owner and not the owner's spouse.
- 5. Dental Benefit Summary - to receive credit for major and orthodontic coverage**
- 6. Illustrative quote with sold plan(s) marked**

Send all enrollment materials to:

E-mail: ACANBUSoldCaseSubmission@aetna.com

There is a 5MB limit when sending via email

Overnight and Regular Mailing Address for New Business cases only

Aetna
841 Prudential Drive
Mail Code F434
Jacksonville, FL 32207

Effective dates may be the 1st or 15th of the month.

Effective Date	Submission deadline
1 st of the month	1 st of the month
15 th of the month	15 th of the month

Any missing information may result in the effective date being moved forward to the next available date

For help with your new case submissions contact your ACA New Business Unit at ACANBUBrokerSupport@aetna.com or call us at 1-844-241-0209

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