

Make your mark

New business sold checklist — California

1 – 100 full-time equivalent employees

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

Employer application

Employee enrollment and waivers [eList Tool available on the Producer World® website](#).

- Aetna eList Tool must have macros enabled prior to entering data and complete the spreadsheet in full.
- Do not amend the eList Tool format in any manner.
- If using the tool, no need to send the employee enrollment forms. All the required information must be entered into the tool.
- Waivers must be included in the eList with the reason waiving.

[Paper copy available on Producer World](#)

- For all eligible employees enrolling or waiving health coverage.
- Waivers may be submitted in a separate Microsoft® Excel waiver listing with the reason for waiving included.

Copy of initial premium check payable to Aetna or ACH form

- When an ACH form is submitted, the form must be fully completed including the amount of the premium.
- When a copy of the check is submitted, upon approval, you will be notified to send the check to the bank lockbox

Wage and tax statement

- Quarterly Wage and Tax Statement (QWTS) must be provided for:
 - 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
- In order to satisfy the small employer requirements for proof of eligibility, the most recent IRS tax documents and the entity formation documents are required. Supporting tax documentation required on sole proprietors and officers. For additional questions on documentation required for a particular group, please reach out to the broker support number listed below.
- There must be at least one enrolled W-2 employee who is not an owner and not an owner's spouse.

Dental benefits summary to receive credit for major and orthodontic coverage (if elected)

PCP selection (primary office ID number) required for Aetna Health Network HMO and is optional for HNOption plans

- Members will not be enrolled without a PCP (when required)

[For complete underwriting guidelines, go to Producer World Small Group](#).

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You can email enrollment materials to:
ACANBUSoldcasesubmission@aetna.com

Note: There is a 5MB limit when sending email.

Overnight and regular mailing address for new business cases only

Aetna
9000 Southside Blvd.
Bldg. 100
Mail code F434
Jacksonville, FL 32256

Submission deadlines:

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

| Effective Date | Submission Deadline |
|-------------------|-------------------------|
| 1st of the month | 20th of the prior month |
| 15th of the month | 5th of the month |

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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