

New Business Submission Process and Checklist

For Aetna Funding Advantagesm Small Group up to 100*

We developed this guide to make the Aetna Funding Advantage new business submission process go as quickly and easily as possible.

Take a few minutes to review the steps below. Then use the checklist (on the next page) to help you finish the submission process.

Submission process

Step 1	Step 2	Step 3	Step 4	Step 5
Submit Sales Notice to Small Group Sold mailbox and cc: your Aetna Account Executive Smallgroupsold@aetna.com	Aetna emails the required paperwork with helpful customer information and triggers the Adobe Sign documents Our email will also contain the following information: <ul style="list-style-type: none">• Springboard census and DC template• Link to SBCs• Billing & Banking Handbook• Submission Checklist• AHIA Data Software License Agreement (if applicable)	Broker/GA returns completed required paperwork to Small Group Sold mailbox Smallgroupsold@aetna.com <ul style="list-style-type: none">• Signed quote• Springboard census and DC template• AHIA Data Software License Agreement (if applicable)• Prior carrier bill• Quarterly Wage & Tax Statement — for groups with 2 to 4 enrolled employees only	Return Adobe Sign docs Broker/GA signs the Employer Application via Adobe Sign Customer completes and submits the Adobe Sign documents: <ul style="list-style-type: none">• Employer application• NY HCRA form• Banking form• Employer Application Ancillary (dental and/or vision) if applicable	Enroll through Springboard We send an email notification when your group is ready for enrollment in Springboard. Broker/GA can complete admin enrollment** or employees can complete their own enrollment in Springboard. Please complete all enrollments prior to submitting final enrollment. Once Springboard shopping has been closed, enrollment changes are not permitted.
The paperwork will not be reviewed until everything in Steps 3 and 4 has been received.				

* 2-50: AZ, IA, ID, IL-S, KS, MD,MN, MO, MS, NE, TX, UT, VA, WI, WY. 5-50: FL, OK. 11-50: ME. 10-50: NV. 2-100: GA, IL-N, LA, MI, OH, PA, SC, TN. 5-100: CO, CT, DE, KY, MA, NJ, WV. 20-100: NC. 15-100: RI

** Brokers/GAs are responsible for maintaining employee paper enrollment forms



Submission checklist

This reference lists all the forms and documents required when submitting a new business account.

Submit sales notice form to Smallgroupsold@aetna.com and your Aetna Account Executive.

We will begin our review process once we receive all items listed below.

Email the following to our sales coordinator team (Smallgroupsold@aetna.com):

- ☐ **Springboard Marketplace Census Template**
 - Fully completed Defined Contribution/Census template
- ☐ **Signed Proposal**
 - Employer must circle, sign and date the selected plans
- ☐ **AHIA Data Software License Agreement**
 - A copy is needed for each agency that the group authorizes on the employer application (if applicable)
- ☐ **Prior Carrier Bill**
 - Bill must be the latest available with employer roster and premium summary page
- ☐ **Quarterly Wage & Tax Statement (groups with 2 to 4 enrolled employees only*)**
 - Must provide complete, unaltered Quarterly Wage & Tax Statement and most current ownership tax documents (i.e., Schedule K-1, Schedule C, and so on) if owner/officer/partner is not listed on Quarterly Wage & Tax Statement. The Quarterly Wage & Tax Statement should be reconciled, signed and dated by the employer.

Complete the following using Adobe Sign:

- ☐ **Employer application**
- ☐ **NY HCRA form**
- ☐ **Banking form**
- ☐ **Employer application — Ancillary (dental and/or vision) if applicable**

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