

Aetna Funding Advantage



Automated New Business Submission Process

Step 1

Notify Aetna AFA Sales Rep case has sold

Step 2

We send GA/Broker the Customer Information Request (CIR) via Echosign email

We use high-level GA/ broker and client information obtained to pre-populate forms sent in step 3

Step 3

We send sold case documents to GA, Broker & Client via Echosign email

- If there is a GA, we will send the Employer Application via Echosign email to the GA to complete their portion of the application prior to the broker.
- Broker completes their portion of the Employer App prior to sending to client for completion.
- We send client the Stop Loss Application, NY HCRA and Banking Form via Echosign email requesting e.signature at the same time we sent the GA/Broker the Employer App.
- AFA Sales Coordinator sends email to GA/Broker with Springboard census template, reporting access request form, sold proposal with selected plans circled, signed and dated by employer, and instructions on where to send current carrier bill.

Step 4

Broker/GA sends completed Employer Application to client

Once GA/Broker completes the Employer Application online – signs, and submits, the document automatically goes to the client for e.signature and submission. The document is routed to Aetna once all signatures have been obtained.

Note: Employer App is NOT a “save as you go” document. Please complete and submit before closing.

Step 5

GA/Broker submits census, reporting access request form, sold proposal and current carrier bill to AFASalesCoordinator@aetna.com

- Note: Sold Proposal must have plan(s) circled, signed dated on each page if more than 1 page of plans sold.
- Current Carrier Bill must have terminated employees marked as termed.
- Submit completed Springboard census template.
- We will send a notification once Springboard is set up and ready use.

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