

Pennsylvania

ACA New Business Sold Checklist 1-50 total average employees

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

1. Employer Application

2. Employee Enrollment and Waivers

eList Tool available on Producer World at

<https://www.aetna.com/producer/SmallGroup/documents/elist/2-100-Existing-New-Business-eList-Tool.xlsm>

- 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.

Or Paper Copy available on Producer World at <https://www.aetna.com/employers-organizations/tools-manuals-forms.html>

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

3. 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.

4. Wage and Tax Statement

- 1 to 50 employees - Quarterly Wage and Tax Statement.
- Sole proprietors, partners, and officers not listed on the QWTS are not required to submit tax documents; the underwriter may request if needed.
- Spouse is employee - must be on QWTS, payroll or tax records.
- There must be at least one enrolled W-2 employee who is not an owner and not an owner's spouse.

5. Dental Benefit Summary to receive credit for major and orthodontic coverage (if elected)

For complete Underwriting Guidelines go to https://www.aetna.com/producer/SmallGroup/underwriting_rules/index.html

Send enrollment materials to	E-mail: ACANBUsoldcasesubmission@aetna.com Note: there is a 5MB limit when sending email.
Submission deadline	<ul style="list-style-type: none"> • 1st of the month effective date - must be received by the 10th of the prior month. • 15th of the month effective date - must be received by the 25th of the prior month. • If the cut-off falls on a weekend or Holiday, next available business day will be the cut-off. • Incomplete cases will be moved to the next available effective date because we cannot process cases that are missing vital information.

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

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 (Aetna). This material is for informational purposes only. Information is believed to be accurate as of the production date; however, it is subject to change.