

# Aetna Funding Advantage



## Automated New Business Submission Process

### Step 1

Submit Sales Notice to AFA Sales Coordinator mailbox and sales rep

[AFA\\_Sales\\_Coordinator@aetna.com](mailto:AFA_Sales_Coordinator@aetna.com)

### Step 2

Aetna emails required paperwork with helpful customer information and triggers Adobe Sign documents

Our email will also contain the following information:

- Springboard template
- Link to SBCs
- Billing & Banking Handbook
- Submission Checklist
- A/HIA Agreement (if applicable)

### Step 3

Broker/GA returns complete required paperwork to sales coordinator mailbox

[AFA\\_Sales\\_Coordinator@aetna.com](mailto:AFA_Sales_Coordinator@aetna.com)

Required paperwork includes:

- Signed quote
- Springboard template
- A/HIA Agreement (if applicable)
- Prior carrier bill
- Quarterly Wage & Tax Statement - for groups with 2 to 4 eligible employees only\*\*

### Step 4

Return Adobe Sign docs  
Broker/GA signs the Employer Application via Adobe Sign

Customer completes and submits the Adobe Sign documents:

- Stop loss application
- NY HCRA form
- Banking form
- Employer application

### Step 5

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.

You must complete all enrollments prior to submitting final enrollment. Once Springboard shopping has been closed, enrollment changes are not permitted.

**We will decline submissions that do not have all required items in Steps 3 and 4.**

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

\*\*Applies to GA, N.I.L, PA and TX only

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