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Aetna

Need original Broker of Record change letter on company letterhead or copy ok?

Copy

Send Broker of Record change letter to (dept name + fax # or mailing address)

Aetna Answer Team: 800.343.6101

Fax: 844.250.9110

NationalSSCSmallGroup@aetna.com

Turn around time for processing this change

7-10 business days

Does carrier notify existing broker of this requested change?

As a courtesy, Aetna notifies the broker after the change is processed via letter - advising them that they have been removed as the broker of record at the customer's request

Effective date for new broker if group does not rescind this change request is prior agent vested? If yes, how long

1st of the month following receipt

Is prior agent vested? If yes, how long?

No

Anthem Blue Cross

Need original Broker of Record change letter on company letterhead or copy ok?

Copy

Send Broker of Record change letter to (dept name + fax # or mailing address)

Sales Support: 877.255.4015

casgbrokerservices@anthem.com

Turn around time for processing this change

7-10 business days

Does carrier notify existing broker of this requested change?

Yes

Effective date for new broker if group does not rescind this change request is prior agent vested? If yes, how long

1st of the following month

Is prior agent vested? If yes, how long?

No

Blue Shield of California

Need original Broker of Record change letter on company letterhead or copy ok?

Copy

Send Broker of Record change letter to (dept name + fax # or mailing address)

Sales Support: 877.255.4015

Turn around time for processing this change

7-10 business days

Does carrier notify existing broker of this requested change?

Yes

Effective date for new broker if group does not rescind this change request is prior agent vested? If yes, how long

1st of the following month

Is prior agent vested? If yes, how long?

No

BROKER OF RECORD CHANGE REQUIREMENTS

CalCPA Helath*

Need original Broker of Record change letter on company letterhead or copy ok?

Copy or fax of letter is required

Send Broker of Record change letter to (dept name + fax # or mailing address)

Banyan Administrators: fax: 877.237.4519

Email: calcpahealth@fnrm.com

Turn around time for processing this change

2 business days

Does carrier notify existing broker of this requested change?

Yes

Effective date for new broker if group does not rescind this change request is prior agent vested? If yes, how long

- If request is received before the 15th of the month, it will be effective on the first of the next month.
- If request is received on or after the 15th of the month, it will be effective on the first of the month following a one month period.
- Please note that this relates to the effective date of commissions. Commissions are paid to the new broker for premiums received on or after the commissions effective date. The broker can start acting on behalf of the firm as soon as we get the request.

Is prior agent vested? If yes, how long?

No

CaliforniaChoice®

Need original Broker of Record change letter on company letterhead or copy ok?

Copy

Send Broker of Record change letter to (dept name + fax # or mailing address)

Finance: 714.972.7368

Turn around time for processing this change

7-14 business days (15 day rescission period)

Does carrier notify existing broker of this requested change?

Yes

Effective date for new broker if group does not rescind this change request is prior agent vested? If yes, how long

1st of the following month

Is prior agent vested? If yes, how long?

Yes - for the first 6 months

CCHP Health Plan

Need original Broker of Record change letter on company letterhead or copy ok?

Company letterhead is required

Send Broker of Record change letter to (dept name + fax # or mailing address)

Sales Dept:

445 Grant Ave #700, San Francisco, CA 94108

415.955.8819

brokers@cchphealthplan.com

Turn around time for processing this change

Up to 14 business days

Does carrier notify existing broker of this requested change?

Yes

BROKER OF RECORD CHANGE REQUIREMENTS**Effective date for new broker if group does not rescind this change request is prior agent vested? If yes, how long**

For House Account (existing group), the new BOR change will not be in effect for Commission until group has reached the renewal month

Is prior agent vested? If yes, how long?

No

Cigna + Oscar**Need original Broker of Record change letter on company letterhead or copy ok?**

Copy OK

Send Broker of Record change letter to (dept name + fax # or mailing address)

brokers@hioscar.com

Turn around time for processing this change

5 business days

Does carrier notify existing broker of this requested change?

Yes

Effective date for new broker if group does not rescind this change request is prior agent vested? If yes, how long

1st of month following the date of change request

Is prior agent vested? If yes, how long?

No

E.D.I.S.**Need original Broker of Record change letter on company letterhead or copy ok?**

Copy

Send Broker of Record change letter to (dept name + fax # or mailing address)

Broker Services: 888.886.7973

Turn around time for processing this change

7-10 days (10 day rescission period)

Does carrier notify existing broker of this requested change?

Yes

Effective date for new broker if group does not rescind this change request is prior agent vested? If yes, how long

1st of the following month

Is prior agent vested? If yes, how long?

No

Health Net**Need original Broker of Record change letter on company letterhead or copy ok?**

Copy

Send Broker of Record change letter to (dept name + fax # or mailing address)

Single Fax # for SBG Account Management: CA SBG

Statewide Fax: 800.303.3110

Turn around time for processing this change

5-7 business days

Does carrier notify existing broker of this requested change?

Yes

Effective date for new broker if group does not rescind this change request is prior agent vested? If yes, how long

1st of following month

Is prior agent vested? If yes, how long?

No

BROKER OF RECORD CHANGE REQUIREMENTS

Kaiser Permanente*

Need original Broker of Record change letter on company letterhead or copy ok?

Copy

Send Broker of Record change letter to (dept name + fax # or mailing address)

Fax Broker of Record changes to: 800.369.8010

For other compensation questions contact Broker Administration at 800.440.2323

Turn around time for processing this change

14 business days

Does carrier notify existing broker of this requested change?

Yes

Effective date for new broker if group does not rescind this change request is prior agent vested? If yes, how long

The date on the BOR letter must be on or before the 1st of the month and be received by KP within the first 5 business days of the month for it to be effective that month

Is prior agent vested? If yes, how long?

No

MediExcel Health Plan

Need original Broker of Record change letter on company letterhead or copy ok?

Copy

Send Broker of Record change letter to (dept name + fax # or mailing address)

sales@mediexcel.com

Turn around time for processing this change

48 hours

Does carrier notify existing broker of this requested change?

No

Effective date for new broker if group does not rescind this change request is prior agent vested? If yes, how long

1st day of month following receipt of notification

Is prior agent vested? If yes, how long?

No

Sharp Health Plans

Need original Broker of Record change letter on company letterhead or copy ok?

Copy

Send Broker of Record change letter to (dept name + fax # or mailing address)

Sales Dept.: 858-499-8246

Turn around time for processing this change

7-10 business days

Does carrier notify existing broker of this requested change?

Yes

Effective date for new broker if group does not rescind this change request is prior agent vested? If yes, how long

1st of following month unless requested during the 1st week of month to be effective that month

Is prior agent vested? If yes, how long?

No

* Please note Kaiser Permanente summary information is contained herein but Kaiser Permanente has not reviewed the information contained within this guide and Word & Brown therefore cannot guarantee its accuracy. Please contact your Word & Brown sales representative in the event of any discrepancies. The information provided in this guide is not intended to describe all of the benefits included in each plan, nor is it designed to serve as the "Evidence of Coverage" or "Certificate of Insurance." The KFHP Evidence of Coverage and the KPIC Certificate of Insurance contain a complete explanation of benefits, exclusions, and limitations.

SIMNSA Health Plan

Need original Broker of Record change letter on company letterhead or copy ok?

Yes, we require the BOR on a company letterhead or copy

Send Broker of Record change letter to (dept name + fax # or mailing address)

RFP@simnsa.com

Turn around time for processing this change

1-2 business days

Does carrier notify existing broker of this requested change?

Yes

Effective date for new broker if group does not rescind this change request is prior agent vested? If yes, how long

1st of the month unless otherwise requested

Is prior agent vested? If yes, how long?

No

Sutter Health Plus

Need original Broker of Record change letter on company letterhead or copy ok?

Copy

Send Broker of Record change letter to (dept name + fax # or mailing address)

Broker Services Department: 916.736.5418

shpbroker@sutterhealth.org

Turn around time for processing this change

3-5 business days provided new BOR is appointed with SHP

Does carrier notify existing broker of this requested change?

Yes

Effective date for new broker if group does not rescind this change request is prior agent vested? If yes, how long

1st of following month

Is prior agent vested? If yes, how long?

No

Total Benefits Solutions (Aetna Int'l.)

Need original Broker of Record change letter on company letterhead or copy ok?

The letter should be provided on your company letterhead and include the following:

- Policy Number
- Name of the new broker or agency including their Tax ID number
- Effective date of the new broker or agency
- Signature and Date

Copy ok

Send Broker of Record change letter to (dept name + fax # or mailing address)

Please email your request to globalrenewals@tbsmga.com

Turn around time for processing this change

3-5 business days

Does carrier notify existing broker of this requested change?

Yes

Effective date for new broker if group does not rescind this change request is prior agent vested? If yes, how long

Broker of record effective date will be what is listed on the BOR letter. For commission purposes, will be 1st of the month following receipt of the change request

Is prior agent vested? If yes, how long?

No

BROKER OF RECORD CHANGE REQUIREMENTS

United HealthCare

Need original Broker of Record change letter on company letterhead or copy ok?

Copy

Send Broker of Record change letter to (dept name + fax # or mailing address)

Group Size 2-100: Renewal Account Executive

Turn around time for processing this change

10 business days

Does carrier notify existing broker of this requested change?

Yes

Effective date for new broker if group does not rescind this change request is prior agent vested? If yes, how long

1st of following month

Is prior agent vested? If yes, how long?

No

Western Health Advantage

Need original Broker of Record change letter on company letterhead or copy ok?

Copy

Send Broker of Record change letter to (dept name + fax # or mailing address)

Sales Department

Fax: 916.568.1338 or via email: WHASales@westernhealth.com

Turn around time for processing this change

3-5 business days

Does carrier notify existing broker of this requested change?

Yes

Effective date for new broker if group does not rescind this change request is prior agent vested? If yes, how long

1st of following month

Is prior agent vested? If yes, how long?

No