

California & Nevada

Small Group Account Management Broker Guide

Word&Brown®

CALIFORNIA & NEVADA SMALL GROUP ACCOUNT MANAGEMENT BROKER GUIDE

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ADDITIONAL RESOURCES

[Carrier Forms](#)

Find carrier, administrator, and Word & Brown forms curated to make your job easier.

[Summary of Benefits & Coverage](#)

Carrier resources such as product SBCs, terms glossary, and more.

[Provider/RX Search](#)

Provider and Prescription Drug Search links for Medical, Dental, and Vision plans.

[Broker of Record Changes](#)

Read about Broker of Record Change Requirements for our carrier partners.



Word & Brown is committed to providing you with the tools and resources you need to help your clients. Below is a summary of carrier-specific tools that may also be of value in addressing questions from your clients and their employees.

Carrier Resource	
Broker Support	Phone: 800-343-6101, Option 6 Email: westaat@aetna.com
Broker Portal Access	Log in and access portal
Employee Add/Term/Change Form Submission	Email: enrollmentsgw@aetna.com
Employer Change Form Submission	Email: westaat@aetna.com
Invoice Request	Email: westaat@aetna.com

Renewal Support	
Phone Support	800-343-6101, option 4
Email	NationalSSCSmallGroup@aetna.com
Due Date	10th of the Month prior to Renewal. Aetna will not accept renewal changes <i>after</i> the renewal date.
Renewal Portal	Access Producer World Registration Services : Access renewals, view plan enrollment, submit group changes and obtain plan benefits.
Renewal Billing & Enrollment Issues	Email: WestAAT@aetna.com Phone: 800-343-6101; option 6

Notes

- Any time there are multiple plan changes, a roster or member movement spreadsheet is required for all lines of coverage (Medical & Ancillary).
- To add additional lines of coverage to your Open Enrollment Renewal, please reach out to your Aetna Account Client Manager.
- For existing employees, enrollment just needs a roster with the plan change name. You can create a simple spreadsheet to submit or just an email. Any new OE employees or new dependents do need to complete an enrollment form. You do have to submit the signed renewal proposal with the new plans marked and the signature from the plan sponsor.



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Carrier Resource	
Broker Support	Phone: 855-854-1429 Email: small.group@anthem.com
Broker Portal Access	Log in and access portal
Employee Add/Term/Change Form Submission	Email: small.group@anthem.com
Employer Change Form Submission	Email: small.group@anthem.com
Invoice Request	Email: small.group@anthem.com

Renewal Support	
Phone Support	855-854-1429
Email	small.group@anthem.com
Due Date	Renewal changes may be submitted during renewal month.
Renewal Portal	Access Producer Toolbox Services: Pull renewals, view enrollment.
Renewal Billing & Enrollment Issues	Email: small.group@anthem.com Phone: 855-854-1429

Notes

- Submit medical benefit selection form included in renewal, when renewal changes are being submitted.
- If wanting to add ancillary to the group's renewal. Fill out and send the specialty modification form, included in the group's renewal for processing.
- Anthem Small Group EmployeeElect Renewal Medical Plan Change Request form can be submitted to update plan election for existing employees.



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Carrier Resource	
Broker Support	Phone: 855-886-6160 Email: nvsgbroker@anthem.com
Broker Portal Access	Log in and access portal
Employee Add/Term/Change Form Submission	Email: small.group@anthem.com
Employer Change Form Submission	Email: small.group@anthem.com
Invoice Request	Email: small.group@anthem.com

Renewal Support	
Phone Support	833-389-1972
Email	small.group@anthem.com
Due Date	Renewal changes may be submitted during renewal month.
Renewal Portal	Access Producer Toolbox Services: Pull renewals, view enrollment.
Renewal Billing & Enrollment Issues	Email: nvsgbroker@anthem.com Phone: 833-389-1972

Notes

- If wanting to add ancillary to the group's renewal. Fill out and send the specialty modification form, included in the group's renewal for processing.
- ACA Health Plan Change Request Form from renewal can be submitted to update plan election for existing employees.



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Carrier Resource	
Broker Support	Phone: 800-559-5905 Email: producerservices@blueshieldca.com
Broker Portal Access	Log in and access portal
Employee Add/Term/Change Form Submission	Email: small.group@blueshieldca.com
Employer Change Form Submission	Email: small.group@blueshieldca.com
Invoice Request	Email: small.group@blueshieldca.com

Renewal Support	
Phone Support	800-559-5905, option 2.
Email	small.group@blueshieldca.com
Due Date	Renewal changes must be submitted <i>within</i> 30 days of the effective date.
Renewal Portal	Blue Shield Broker Registration Services: Access renewals, view enrollment, submit plan changes and obtain plan benefits.
Renewal Billing & Enrollment Issues	Email: I&Bpriority@blueshieldca.com Phone: 800-559-5905

Notes

- If group is adding ancillary coverage after renewal month, request will have to be sent to the above email for processing. Changes may not be submitted through broker portal.
- Additional Renewal Resources: [Blue Shield Renewal Center](#)
- Blue Shield Video on renewal center capabilities for brokers: [Blue Shield Renewal Center Navigation Tutorial](#)
- The Multiple Subscriber Change Spreadsheet can be submitted to update member plan elections for existing employees. If member is requesting additional changes, the full Subscriber Change is needed.



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Carrier Resource	
Broker Support	Phone: 800-558-8003 Email: customerservice@calchoice.com
Broker Portal Access	Log in and access portal
Employee Add/Term/Change Form Submission	Email: memberprocessing@calchoice.com
Employer Change Form Submission	Email: gpc@choiceadmin.com
Invoice Request	Email: customerservice@calchoice.com

Renewal Support	
Phone Support	800-558-8003
Email	Group Level Changes: gpc@choiceadmin.com Member Level Changes: memberprocessing@calchoice.com
Due Date	CalChoice prefers renewal changes to be submitted 60 days prior to renewal month. Group changes will be accepted within the renewal month.
Renewal Portal	CaliforniaChoice Services: Access renewal and obtain plan benefits.
Renewal Billing & Enrollment Issues	Email: customerservice@calchoice.com Phone: 800-558-8003

Notes

- Any exceptions submitted outside of renewal should include an exception request form and be sent to customerservice@calchoice.com. If questions on an exception request, please reach out at 800-558-8003.
- Each employee changing their plan must complete their own Change Request Form.



Word & Brown is committed to providing you with the tools and resources you need to help your clients. Below is a summary of carrier-specific tools that may also be of value in addressing questions from your clients and their employees.

Carrier Resource	
Broker Support	Phone: 855-672-2713 Email: brokers@hioscar.com
Broker Portal Access	Log in and access portal
Employee Add/Term/Change Form Submission	Email: business@hioscar.com
Employer Change Form Submission	Email: business@hioscar.com
Invoice Request	Email: business@hioscar.com

Renewal Support	
Phone Support	855-672-2713
Email	business@hioscar.com
Due Date	Changes should be submitted for processing before requested renewal date.
Renewal Portal	Broker Portal
Renewal Billing & Enrollment Issues	Email: business@hioscar.com Phone: 855-672-2713



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Carrier Resource	
Broker Support	Phone: 800-448-4411, option 4 Broker Services: 800-909-3447, option 3 Email: HN_account_services@healthnet.com
Broker Portal Access	Log in and access portal
Employee Add/Term/Change Form Submission	Email: Enrollmentunit_north@healthnet.com
Employer Change Form Submission	Email: Enrollmentunit_north@healthnet.com
Invoice Request	Email: Accounting@healthnet.com

Renewal Support	
Phone Support	800-447-8812, option 2
Email	Renewal Changes need to be submitted to the assigned Account Manager. Contact information found at Health Net Broker Renewal Support and on the renewal.
Due Date	Renewals to be completed within 30 days of the effective date, for changes to be reflected at the time of renewal (Medical & Ancillary).
Renewal Portal	HealthNet Broker Portal Access Services: Access renewals, submit group plan changes and obtain plan benefits.
Renewal Billing & Enrollment Issues	Email: HN_account_services@healthnet.com Phone: 800-224-8808

Notes

- Health Net will process Group changes during the renewal month. However, changes will take longer to be reflected on the group's billing cycle – one to two months out.
- The Open Enrollment Change Form can be completed to reflect plan changes for existing employees.



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Carrier Resource	
Broker Support	Phone: 877-876-0873 Email: csc-sd-sba@kp.org
Broker Portal Access	Log in and access portal
Employee Add/Term/Change Form Submission	Email: csc-sd-sba@kp.org
Employer Change Form Submission	Email: amt@kp.org
Invoice Request	Email: csc-sd-sba@kp.org

Renewal Support	
Phone Support	800-790-4661, option 2
Email	csu.ca@kp.org
Due Date	Renewal changes need be turned in by the 15th of the month by 5pm, to be effective the 1st of the <i>renewal month</i> . Changes submitted after the 16th of the month will be effective the first of the following month
Renewal Portal	Kaiser Permanente Broker Employer Resources Services: Access renewal, submit group plan changes, obtain plan benefits.
Renewal Billing & Enrollment Issues	Email: amt@kp.org Phone: 800-790-4661, option 3

Notes

- Renewal Kit will have the necessary renewal forms for groups renewal.
- The group's renewal packet will include a form with all employees listed where employer can request to update plan elections for existing employees.

SHARP Health Plan

Word & Brown is committed to providing you with the tools and resources you need to help your clients. Below is a summary of carrier-specific tools that may also be of value in addressing questions from your clients and their employees.

Carrier Resource	
Broker Support	Phone: 858-499-8009 Email: shp.commercialsales@sharp.com
Broker Portal Access	Log in and access portal
Employee Add/Term/Change Form Submission	Email: shp.commercialsales@sharp.com
Employer Change Form Submission	Email: shp.commercialsales@sharp.com
Invoice Request	Email: shp.commercialsales@sharp.com

Renewal Support	
Phone Support	Contact your Sharp Account Manager or call 800-359-2002
Email	shp.commercialsales@sharp.com
Due Date	An employer must submit change requests to Sharp Health Plan Account Manager on or before the renewal effective month.
Renewal Portal	N/A
Renewal Billing & Enrollment Issues	Contact your Sharp Account Manager or call 800-359-2002

Notes

- Sharp will accept a spreadsheet with the new plan elections for existing employees.



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Carrier Resource	
Broker Support	Phone: 800-591-9911, option 1 Email: ClientServiceOperations@uhc.com
Broker Portal Access	Log in and access portal
Employee Add/Term/Change Form Submission	Email: ClientServiceOperations@uhc.com
Employer Change Form Submission	Email: ClientServiceOperations@uhc.com
Invoice Request	Email: ClientServiceOperations@uhc.com

Renewal Support	
Phone Support	800-591-9911, option 1
Email	For assistance on group's renewal process, please contact Broker Services for Assigned Renewal Representative
Due Date	Group level changes should be submitted no later than the 5th of the renewal month. Employee changes have up to 60 days from renewal date for submission. All employee changes will be retro to the renewal date.
Renewal Portal	United eServices Broker Center Portal Support: 1-866-336-9369, option 3 Services: Access renewal, view group enrollment, obtain plan benefits.
Renewal Billing & Enrollment Issues	Email: clientserviceoperations@uhc.com Phone: 800-591-9911

Notes

- Notify UHC Assigned Renewal Representative if group is renewing "as is".
- **Required Items for Group Changes:** Group Acceptance/Change Form Product and Benefit Selection Form & Small Business Renewal OE Spreadsheet, specifying employee level changes

Ancillary Products

Please use the following contact emails and phone numbers for timely processing:

Carrier	Adds/Terms/ Member Changes	Invoice	Renewals	Phone
Ameritas	group_assistants@ameritas.com			855-517-5307
BEST Life	changes@bestlife.com	cs@bestlife.com		800-433-0088
California Dental	Membership@caldental.net		Nicole.mueller@caldental.net	877-433-6825
Choice Builder	MemberProcessing@choicebuilder.com	CustomerService@choicebuilder.com		866-412-9279
Companion Life	CompanionService@companionlife.net		CLife.Renewals@companiongroup.com	800-753-0404
Delta Dental	cs@alliedadministrators.com			877-472-2669
Guardian	cru@glic.com or Fax: 610-807-2994	GuardianMaintenance_billing@glic.com	cru@glic.com	800-627-4200
Humana	Need to use secure email from Humana website: CommAndSpecEnroll@humana.com	SBMarketSupport@Humana.com		800-592-3005
Landmark	groupservices@LHP-CA.com			800-298-4875
Liberty	NationalAccounts@libertydentalplan.com			888-273-2997
Lincoln Financial	ClientServices@lfg.com	SBSbrokerService@lfg.com	SBSrenewals@lfg.com	800-423-2765
Metlife	Irvine_Service@metlifeservice.com			800-275-4638 888-653-8325, option 1
Premier Access	enrollment@premierlife.com	AM@premierlife.com		888-715-0760
Principal	Eff 10/1/23, must use Principal Portal: login.principal.com	GroupBenefitsAdmin@principal.com		800-843-1371
Reliance Standard	adminserv@employeebenefit-service.com Life: EOapplications@rsli.com Changes: admin.changes@rsli.com Fax: 402-309-2583	admin.changes@rsli.com		800-351-7500
SmileSaver	safeguard_inquires@metlifeservice.com			800-880-1800
United Concordia	UCClenroll@ucci.com		UCClsbu@ucci.com	Small Group: 800-972-4191, option 4
Unum	AskUnum@unum.com			800-275-8686
Vision Plan of America	info@visionplanofamerica.com			800-400-4872
VSP	Vspbilling@vsp.com			800-216-6248