

**AETNA FUNDING ADVANTAGE<sup>SM</sup>**  
**Small Group up to 100**

**PLEASE NOTE: This checklist is provided as a guide. The carrier may require additional items and documentation. Please refer to the carrier's underwriting guidelines for a complete list of requirements. Please use the latest version of forms.**

Our goal is to process your new group enrollment easily and efficiently in order to provide you and your client with a quick approval. The following list outlines the health plan's case submission requests:

Email the following to our sales coordinator team ([Smallgroupsold@aetna.com](mailto:Smallgroupsold@aetna.com)):

- ☐ **Springboard Marketplace Census Template**
  - Fully completed Defined Contribution/Census template.
- ☐ **Signed Proposal**
  - Employer must circle, sign and date the selected plans
- ☐ **AHIA Data Software License Agreement**
  - A copy is needed for each agency that the group authorizes on the employer application (if applicable)
- ☐ **Prior Carrier Bill**
  - Bill must be the latest available with employer roster and premium summary page.
- ☐ **Quarterly Wage & Tax Statement (groups with 2 to 4 enrolled employees only\*)**
  - Must provide complete, unaltered Quarterly Wage & Tax Statement and most current ownership tax documents (i.e., Schedule K-1, Schedule C, and so on) if owner/officer/partner is not listed on Quarterly Wage & Tax Statement. The Quarterly Wage & Tax Statement should be reconciled, signed and dated by the employer.

Complete the following using Adobe Sign:

- ☐ **Employer application**
- ☐ **NY HCRA form**
- ☐ **Banking form**
- ☐ **Employer application — Ancillary (dental and/or vision) if applicable**

**After approval, prior carrier termination letter must be submitted by the employer or broker.**

**Important Reminder:** To help your client comply with ACA requirements, provide a copy of the appropriate Summary of Benefits and Coverage (SBC) to each employee at the Enrollment Meeting, via email or by posting on an internal company website. For the most recent information regarding Aetna's SBCs, contact your Word & Brown representative.