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Aetna

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

Aetna requires the request to be on group company letterhead.

The request on company letterhead needs to be faxed to 860-754-9010, no DocuSign.

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

Requests may be submitted via email to the assigned Account Manager.

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

Follow-up on commission questions can be submitted directly to the commission team at BrokerComm@aetna.com

Anthem Blue Cross

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

To update the Agent of Record (AOR) for a Small Group, please provide the following:

A formal request on the group's official letterhead, signed by the group administrator or an authorized officer.

The request must include the signer's printed name and title.

It should also specify the name and NPN of the new agent or agency being requested.

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Electronic signatures submitted through DocuSign or Adobe Sign are acceptable.

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

Sales Support: 877.255.4015

mail to: producers@elevancehealth.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?

A Broker of Record Change Form must be signed by the designated group contact and submitted. BSC will accept a letter from the group; however, if any information is missing, the Producer Services team will pend the form.

A broker of record form can be signed using DocuSign. Please ensure that the email trail showing both sent and received messages is included with the request or document. Broker of record change requests can also be submitted directly through the Broker Portal.

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

Sales Support: 877.255.4015

Email to: producerservices@blueshieldca.com

BROKER OF RECORD CHANGE REQUIREMENTS

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

CaliforniaChoice®

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

Copy

A wet signature is preferred; DocuSign is accepted.

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

Finance: 714.908.3519

Commissions@calchoice.com

Turn around time for processing this change

7-14 business days

Does TPA notify existing broker of this requested change?

Yes

Effective date for new broker

1st of the following month

Is prior agent vested?

No - not vested

Health Net

Need original Broker of Record change letter on company

letterhead or copy ok?

Copy

Or, a request sent on company letterhead. DocuSign is not needed.

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

Kaiser Permanente*

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

Copy

To add, change, or remove a BOR, an Authorized Representative must submit a [Broker of Record Authorization](#) (for existing groups) or submit a request for the change written on your company's letterhead.

BOR information can be found on this broker website <https://account.kp.org/business/broker/california/working-with-kp/broker-record-information>.

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

The small group form is available on the portal and can be signed electronically. Large accounts are managed through the Account Manager.

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

The effective date for your BOR change is dependent on the date we receive your request. The electronic form or letter must be received by the 5th business day for the change to be effective retroactive on the 1st of 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?

MediExcel requires a letter on company letterhead that is signed by an authorized representative.

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?

A signed letter from an authorized contact, on company letterhead.

DocuSign accepted but not to issue agreements.

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

SIMNSA Health Plan

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

Yes, copy ok and the letter should be provided on 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

Send Broker of Record change letter to (dept name + fax

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or mailing address)

cschneider@simnsa.com

Turn around time for processing this change

2-3 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 day of the month following receipt of notification.

Is prior agent vested? If yes, how long?

NA

Sutter Health Plan

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)

Sutter Health Plan Service Team

855.315.5800

SHPServiceTeam@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?

N/A

UnitedHealthCare

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

* 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.

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

7-10 business days, once all required paperwork is received.

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

Effective the first of the month following receipt of the BOR letter.

Is prior agent vested? If yes, how long?

No