



**AETNA FUNDING ADVANTAGE<sup>SM</sup>**  
**GROUP SIZE 10-50**

**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:

**1. Submit sales notice form to [afasalescoordinator@aetna.com](mailto:afasalescoordinator@aetna.com) and your sales rep**

We will begin our review process once we receive all items listed below:

**2. Email the following to our sales coordinator team ([afasalescoordinator@aetna.com](mailto:afasalescoordinator@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 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 eligible employees only\*)
  - Must provide complete, unaltered Quarterly Wage & Tax Statement and most current ownership tax documents (i.e. Schedule K-1, Schedule C, etc.) if owner/officer/partner not listed on Quarterly Wage & Tax Statement.

**3. Complete the following through Adobe Sign:**

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

**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.

Aetna is the brand name used for products and services provided by one or more of the Aetna group of subsidiary companies, including Aetna Life Insurance Company and its affiliates (Aetna). Aetna Funding Advantage (AFA) plans are self-funded, meaning the benefits coverage is offered by the employer. Aetna Life Insurance Company only provides administrative services and offers stop loss insurance coverage to the employer.