

Make your mark

ACA New business sold checklist — California

1 – 100 full time equivalent employees

Any missing information may result in the effective date being moved forward to the next available date.

Employer application

Employee enrollment and waivers

eList Tool available on the [Producer World](#).

- Aetna eList Tool must have macros enabled prior to entering data and complete the spreadsheet in full.
- Do not amend the eList Tool format in any manner.
- If using the tool, no need to send the employee enrollment forms. All the required information must be entered into the tool.
- Waivers must be included in the eList with the reason waiving.

Paper copy available on [Producer World](#)

- For all eligible employees enrolling or waiving health coverage.
- Waivers may be submitted in a separate Microsoft Excel waiver listing with the reason for waiving included.

Wage and tax statement

- Quarterly Wage and Tax Statement (QWTS) must be provided for:
 - 1 to 5 enrolled employees
 - 6 to 100 enrolled employees with:
 - No current employer group health coverage
 - More than 10% of employees are located outside of California
 - More than 20% are COBRA/Cal-COBRA employees
 - Associated, affiliated, multiple companies

- In order to satisfy the small employer requirements for proof of eligibility, the most recent IRS tax documents and the entity formation documents are required. Supporting tax documentation required on sole proprietors and officers. For additional questions on documentation required for a particular group, please reach out to the broker support number listed below.
- There must be at least one enrolled W-2 employee who is not an owner and not the owner's spouse.

Dental benefits summary to receive credit for major and orthodontic coverage (if elected)

PCP selection (primary office ID number) required for Aetna Health Network HMO and is optional for HNOption plans

- Members will not be enrolled without a PCP (when required).

Please review the new ACH banking agreement for the most efficient way to pay the premium, other options are available. Completion of this form will help speed up the process of the final review of your group.

[For complete underwriting guidelines, go to Producer World Small Group.](#)

Enrollment materials must be e-mailed to:

ACANBUoldcasesubmission@aetna.com

Note: There is a 5MB limit when sending email.

Submission deadlines:

- Effective dates may be the 1st or 15th of the month.
- The next available business day will be used when the submission deadline date falls on a weekend or holiday.
- Cases with incomplete information will be moved to the next available effective date because we are unable to process cases that are missing vital information.

Effective Date

1st of the month

15th of the month

Submission Deadline

by the 5th of the month

by the 20th of the month

For help with your new case submissions, contact your NBU Broker Support at SGBrokerSupport@aetna.com, or call us at 1-844-241-0209.

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