

# 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 [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.

#### Quarterly wage and tax statement (QWTS)

- A 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 located outside of California
    - More than 20% are COBRA/Cal-COBRA employees
- The most recent IRS tax documents and entity formation documents are required to satisfy proof of eligibility requirements (if the owner is not on QWTS or payroll). Supporting tax documentation is required on sole proprietors and officers. For questions on required documentation for a specific group, please contact NBU Broker Support.

- There must be at least one enrolled W-2 employee who is not an owner and not the owner's spouse/domestic partner.

#### 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).

**The ACH banking agreement is 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](mailto:ACANBUoldcasesubmission@aetna.com)**

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

#### **Submission deadlines:**

- The next available business day will be used when the submission deadline 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  
15<sup>th</sup> of the month

#### **Submission Deadline**

by the 10<sup>th</sup> of the month  
by the 25<sup>th</sup> of the month

For help with your new case submissions, contact your NBU Broker Support at **[SGBrokerSupport@aetna.com](mailto:SGBrokerSupport@aetna.com)**, or call us at **1-844-241-0209**.

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