

# New Business Submission Process

## Small Group Aetna Funding Advantage<sup>SM</sup>

### Process Overview

Step 1:	Step 2:	Step 3:	Step 4:
<p>Submit sales notice with the below required documents. Email them to: SmallGroupSold@Aetna.com</p> <p>You should attach:</p> <ul style="list-style-type: none"> <li>The signed proposal</li> <li>A completed census template</li> <li>AHIA Data Software License Agreement</li> </ul>	<p>Your group will be assigned to a sales coordinator to help collect required paperwork.</p> <p>You'll complete in Adobe Sign:</p> <ul style="list-style-type: none"> <li>Employer application(s)</li> <li>NY HCRA form</li> <li>Banking form</li> </ul>	<p>You (broker/GA) finish paperwork electronically with your sales coordinator.</p> <p>Sales coordinator will identify missing info and help answer any questions you have</p>	<p>If your group is using Springboard, we'll tell you when the group is ready to be enrolled. If you'd prefer, we can do the work for you.</p> <p>Your assigned Sales Coordinator will finalize your group once all required paperwork has been received.</p>

### Definitions and Requirements

<b>Signed Proposal</b>	The employer must circle, sign and date the selected plans
<b>Completed census</b>	Fully completed census template
<b>AHIA Data Software License Agreement</b>	A copy is needed for each agency that the group authorizes on the employer application (if applicable)
<b>Employer Application</b>	Both medical and ancillary (if applicable)
<b>NY HCRA Form</b>	This form is required to comply with New York Health Care Reform Act legislation that requires a group to be submitted to the NYHCRA pool by the effective date. This form is required for all groups regardless of location.
<b>Banking Form</b>	Establishes the plan sponsor bank account we'll use to fund monthly payments

Aetna is the brand name used for products and services provided by one or more of the Aetna group of companies, including Aetna Life Insurance Company and its affiliates (Aetna).

Aetna Funding Advantage<sup>SM</sup> plans are self-insured by the employer and administered by Aetna Life Insurance Company. Stop loss insurance coverage is offered by Aetna Life Insurance Company.

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