



New Business Resources

Quoting through Installation

Quoting and sold case step-by-step
guide for Small Group Aetna Funding
AdvantageSM



Underwritten quoting process

Aetna Funding AdvantageSM for small businesses

1. Make sure the group is eligible and will meet participation requirements

Participation for contributory plans:

- 2-9 eligible employee groups, 50 percent of total eligible employees
- 10-100 eligible employee groups, 30 percent of total eligible employees, with a minimum of 4 enrolled

Find the full details in the underwriting guidelines

2. Fill out the quote cover sheet and member level census.

Depending on the group's size and current coverage, the template will ask you to attach the following:

	2-50 FI incumbent	2-50 LF incumbent	2-50 non-ACA FI* incumbent	51-100 FI incumbent	51-100 LF incumbent
A copy of the carrier renewal which includes current and renewal rates		X	X	X	X
Claims experience for last 12 months including detailed large claims report		X			X
Current plan designs or summary of benefits for all plans	X	X	X	X	X
Current Plan for each member				X	X

3. Send the quote cover sheet/census template with attachments to the appropriate mailbox:

- Groups with 2-50 employees: SmallGroupUWQuotes@Aetna.com
- Groups with 51-100 employees: 51-100SGPlusUWQuotes@Aetna.com

4. You'll get an email from us once we've finished reviewing your submission.

If you're ready to move forward with our proposal, follow the sold case process on the next page.

*Includes groups on PEO, MEWA and pre-ACA grandfathered plans.

New business submission process

Aetna Funding AdvantageSM for small businesses

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"> The signed proposal A completed census template 	<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"> Employer application(s) NY HCRA form Banking form 	<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

Signed Proposal	The employer must circle, sign and date the selected plans
Completed census	Fully completed census template
Employer Application	Both medical and ancillary (if applicable)
NY HCRA Form	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.
Banking Form	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 AdvantageSM 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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