

New business case submission checklist

Groups of 50 or Fewer Eligible Employees

Broker Name _____ Agency Name _____

For questions on this submission, please contact _____

Phone () _____ Fax () _____

Email Address _____

Prospect/Client Name _____

Prospect Email Address _____

New Jersey

For assistance with your new case submissions, contact your Aetna Sales Manager or call us at 1-888-277-1053.

Send all information to:

**Aetna Small Group
New Case Submissions
P.O. Box 9610
Cranbury, NJ 08512**

**Overnight Mail
Aetna Small Group
3 Independence Way
4th floor
Princeton, NJ 08540**

Step 1

Complete/Review Employer Application

- HMO/PPO/Dental/Life Application
- Certification Form
- Dental/Life Application
- Joinder Agreement filled out for Life or out-of-state products.
- WR-30 or other applicable tax documents (Proof of Eligibility Form, if owner/officer/partner not on tax form)
- Initial premium check made payable to Aetna, Inc.
- Copy of current/prior medical carrier's latest bill with employee roster and premium summary page

Step 2

Complete/Review Employee Enrollment/Change Form

- Employee (EE) Enrollment Form for each employee (HMO/PPO)
- Dental (EE) Enrollment Form
- Group Insurance (EE) Enrollment Form
- Waiver Form for each employee waiving coverage

Step 3

Complete/Review Broker Information

- Illustrative signed rates and copy of census (Employee Listing Report) from Aetna rating tool
- Agent/broker must be licensed in New Jersey and appointed by Aetna

Effective dates may be the **first or fifteenth of the month only**. All required paperwork must be received by Aetna at least **five business days** prior to the requested effective date.

All paperwork is enclosed and my submission is complete. I understand incomplete paperwork could delay the effective date of coverage.

Signature _____

We want you to know[®]



Submission details & guidelines

New Jersey

Avoid potential delays in getting your client enrolled.

Make sure your new case submissions are complete!

Employer Information Employer application

- Employer signature must be an owner or corporate officer
- Number of eligible and enrolled employees
- Premium percentage paid by employer
- Indicate selected products in Section II — Specifications for Coverage
- Complete grid for any employee/dependent health continuations (e.g., COBRA continuation)
- Applications will not be accepted more than 60 days from date signed

WR-30 or other applicable tax documents

- Out-of-state employees require proof of employment if not identified on WR-30
- If owner, partner or corporate officer not listed on WR-30, submit the Small Group Proof of Eligibility Form signed by employees and with requested documents
- If newly hired employees are not identified on the WR-30, submit payroll report indicating compensation and taxes withheld

Initial premium check made payable to Aetna, Inc.

- Company check required

Copy of current/prior medical carrier's latest bill

- Include employee roster and premium summary page

Employee Information Employee applications filled out by each employee

- Any alterations must be initialed and dated by employee
- Individual Waiver Section completely filled out for each employee waiving coverage

Dental submissions*

- Employer Master Application
- Employee Enrollment Form
- First month premium check required (on company check stock) — Medical, Dental and Group Insurance may be submitted on one check
- Copy of illustrative Dental rates and census

Group Insurance submissions*

- Employer Master Application
- Employee Enrollment Form
- First month premium check required (on company check stock)
- Group Insurance and Dental may be submitted on one check
- Copy of illustrative Life rates and census if Term Life selected
- Individual Health Statement required if selecting Life amount in excess of Guaranteed Issue amount
- Completed Joinder Agreement

*If submitting standalone Dental or Life submission, tax documents and copy of prior carrier's bill are also required.

Aetna is the brand name used for products and services provided by one or more of the Aetna group of subsidiary companies (Aetna).

This material is for informational purposes only. Information is believed to be accurate as of the production date; however, it is subject to change.

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