

New business checklist Pennsylvania 2–50*

It's so easy

To help ensure the underwriting of your case is quick and easy, we are providing this simple checklist.

- 1. Employer Application**
- 2. Employee Enrollment and Waiver Applications**
 - For all eligible employees enrolling or waiving health coverage
 - Waivers may be submitted in a separate excel waiver listing with the reason for waiving included
- Or E-listing**
 - Enrollment census must include plan selection and tobacco status
 - Be sure and include a separate listing for waivers with the reason for waiving included
- 3. Copy of Initial Premium check payable to Aetna or ACH Form**
- 4. Wage and Tax Statement**
 - 2 to 9 enrolled employees – Quarterly Wage and Tax Statement
 - 10 to 50 enrolled with no prior coverage – Quarterly Wage and Tax Statement
 - 10 to 50 enrolled with prior coverage – upon request, the underwriter will contact you if a Quarterly Wage and Tax statement is necessary
- 5. Dental Benefit Summary**
 - For major and orthodontia credit for Standard 2 to 9 and Voluntary 3 to 50 eligible employees
- 6. Electing Vision Benefit**
 - Submit the Aetna Vision Preferred Static quote signed by the employer with the plan selected

- 7. Illustrative quote with sold plan marked**

- Signed and dated by the Plan Sponsor

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

Send all enrollment materials to:

E-mail: BlueBellSGNBSubmission@aetna.com

Secure File Transport (FTP): <https://st3.aetna.com>

If you do not have access to the FTP server, please contact your Aetna Sales Executive for access or visit us at Producer World.

Effective dates may be the 1st or 15th of the month.

Effective date	Submission deadline
1 st of month	25 th of prior month
15 th of month	10 th of the month

For assistance with your new case submissions contact your Aetna sales manager or call us at **1-877-282-3862**.

*Based on TAE/ATNE count, not number of eligible employees

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