

Group enrollment checklist

Effective dates may be the first or 15th day of the month only.

Applications must be received by Aetna by the end of the fifth business day after the requested effective date.

Step 1

Complete/Review Employer Application

- Complete all pages of application.
- Employer signature must be an owner or corporate officer.
- No altered applications.
(New application required.)
- Applications cannot be more than 60 days old.
- Plan options indicated.
- Complete COBRA/FMLA form (if required and include COBRA continuees' qualifying event and date).

Step 2

Complete/Review Employee Enrollment/Change Form

- All pages must be complete with signatures where required.
- No alterations allowed (must be initialed and dated by eligible employee).
- Waivers/declinations of coverage section completed.
 - Required for employees — indicate other group coverage. Copies of ID cards may be required for all employees declining.
 - Required for dependents — indicate other group coverage — list dependent(s) name(s) and reason for declining.

Step 3

Provide Applicable Tax Information

- All Business Entities**
A copy of the firm's most recent Quarterly Wage and Tax Statement.
- Sole Proprietor**
Schedule C (IRS Form 1040 C, 1040 F, 1040 SE or 1040 ES (estimated tax)).
- Partner**
Latest filed Schedule K-1 (IRS Form 1065 Schedule K-1, 1040 SE, 1040 ES (estimated tax)).
- Corporate Officer**
IRS Forms 1120, 1120 A or 1120 W (C-Corp & Personal Service Corp)
IRS Form 1120 S Schedule K-1 or 1040 ES (estimated tax) (S-Corp)
IRS Form 8832 (Entity Classification; for LLC's treated as a corporation).
- Limited Liability Company (LLC) Member**
Articles of Organization along with the Operating Agreement.

Step 4

Complete/Review Initial Premium Check

- A premium check for 100% of the first month's Medical, Dental and Life premiums payable to "Aetna Health of California Inc." (A company check is required, and Aetna's receipt of the check does not guarantee acceptance of the group.)

Step 5

Provide Documentation of Previous Coverage with Last Premium Statement

- Copy of prior carrier's latest billing with employee effective dates (if continuous coverage replacement).

Step 6

Complete/Review Broker and General Agent information

- Complete, sign and date the Agent/ Broker Certification section of the Employer Application.
- Review Steps 1 through 5 for completion prior to submission.
- Verify underwriting guidelines were reviewed and understood.
- Submit a copy of the Aetna Quote package.
- Complete and review Aetna Agent Agreement, if applicable.