

Group Enrollment Checklist

For a complete benefit solution, don't forget to offer Dental and Life Insurance.

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)
- Joiner Agreement, if applicable.

Step 2

Complete/Review Employee Enrollment/Change Form

- Completely filled out by each employee.
- Signed by spouse (if spouse is applying for coverage).
- 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 are required for all employees declining coverage.
 - 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**
Latest Filed Schedule C
- Partner**
Latest Filed Schedule K-1
- Corporate Officer**
Statement by Domestic Stock Corporation or Statement of Information and Certificate of Qualification
- Limited Liability Company (LLC) Member**
A Statement of Information or Articles of Organization 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 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 (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 one through five 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.

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

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

**Send paperwork to:
Aetna Small Group
1385 East Shaw Avenue
Fresno, CA 93710**