



Small Employer Cover Sheet & Checklist Renewal Case Information

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Thank you for your business. We look forward to continuing to provide your employee benefit needs. In order to expedite your renewals, please use this page as a guide.

NOTE:

Any changes made to your current plan offering must be made by the last business day of the month prior to your effective date.

REQUIRED DOCUMENTS TO RENEW CURRENT PLAN OR AN ALTERNATE PLAN:

Employee Enrollment/Change Forms are required for:

- all new enrollees **not** included on the renewal quote
- all employees when moving from PPO to HMO medical, single to dual option medical and when adding additional products
- **Converting from a single product HMO medical plan to a single product PPO medical plan:** Employee Enrollment/Change Forms are **NOT** required.
- **For Dental only coverage:** Individual Medical Questionnaires do not apply however enrollment forms must be submitted.
- **For Life coverage:** Individual Medical Questionnaires are only required for coverage requests greater than the guaranteed issue amount.
- currently covered employees **terminating** coverage for the coming year
- currently covered employees adding or removing dependents from coverage for the coming plan year.

Waivers for all employees not accepting coverage.

Signed **Plan Sponsor Signature Rate Page**

Completed and Signed **Employer Application**

Completed and Signed **Medicare Secondary Payor Verification Form**