



New Group Submission Checklist- Local Access

Aetna International Plans are effective on the 1st of the month. All paperwork is required for submission 30 days prior to the effective date.

To be completed by the plan sponsor:

❖ *Helpful hints*

- AI Group Application
 - ❖ Employer address should reflect United States location, unless company is headquartered in Canada. The employer address must reflect either a US or Canadian address.
 - ❖ Include total number of employees worldwide in Section A for Eligibility/Participation. A minimum of 50 employees worldwide is required for eligibility.
- AI Joinder Agreement
 - ❖ The Signed at (City/State) should match the location listed on the group application.
 - ❖ Witness signature is also required.
- Electronic Publishing & Enrollment Agreement (e.Pub Agreement)
- Electronic Enrollment Spreadsheet
 - ❖ All enrolling members, including dependents, must be listed individually on their own separate line. Dependents should be listed directly under the employee.
 - ❖ Salary, Beneficiary, and EOI information are only required for groups purchasing a life policy
- Implementation Details Sheet- *All questions must be answered/completed.*
- Group Medical Questionnaire
- Signed Rate Package



- Late Submission Request- *Submissions are required 30 days prior to their effective date. This form is required for all submissions after this timeframe.*
- ERISA Information Form
- Check/Wire Transfer Confirmation
 - By Check
 - ❖ Scanned copy of the check is required prior to mailing to Aetna
 - ❖ Checks may be mailed to Aetna International at the following address:

Aetna International
151 Farmington Avenue, RE4K
Hartford, CT 06156
Attn: Mahalia Ledford

- By Wire Transfer (*provide one of two options*)
 1. Printed confirmation of wire transfer
 2. Date, name, and exact amount sent for verification.

Note that the Control, Suffix, and Account Number will not yet be available. Transfer can be confirmed with information provided above.

All submissions are subject to Aetna Underwriting approval. Final rates are based on final enrollment. Evidence of Insurability (EOI) is required if life insurance exceeds \$75,000. Medical exam and EOI are required if life insurance exceeds \$150,000.

