

Aetna Funding AdvantageSM

Idaho Small Group Broker Set Up Checklist

Aetna Funding Advantage provides small businesses with the affordable and attractive benefits of self-funding that are traditionally only offered to larger companies. With the predictability of a stable monthly payment, the protection of stop-loss insurance, and the opportunity to save costs when medical claims are lower than expected, it is a win-win for our customers.

- **Step 1: Get Licensed and Appointed with Aetna**
 - Send your producer license to LAAU@aetna.com
 - Aetna will confirm appointment via email
 - If you have additional questions you can reach out to the licensing department at LAAU@aetna.com or 866-511-2863

- **Step 2: Register in ProducerWorld**

AFA quoting requires a ProducerWorld log in. If you don't have one, you can register in the Producer section of aetna.com. Hover over the log in section and click on [Register](#).
Note: To register, you must be the principal of your agency and licensed and appointed OR be granted access by the principal (or the designee of the principal) of your agency.

- **Step 3: Get started quoting with us!!**

For an illustrative quote we need:

1. **Group information:**
 - Business name and address
 - Number of eligible and enrolled employees
 - SIC
2. **Broker name and contact information**
3. **Member level census in Excel file:**
 - Must include all full-time eligible employees, COBRA, waivers and retirees:
 - Legal first name
 - Legal last name
 - Date of birth
 - Gender
 - Home zip code
 - Relationship to employee
 - Enrollment tier (EE, ES, EC, EF or Waiver)
4. **Requested Effective Date**
 - Must be 1st of the month
5. **Please send all quote requests to: idaho@tbsmga.com**