

**TABLE OF CONTENTS**

Aetna.....	2
Anthem Blue Cross .....	2
Blue Shield of California.....	2
CalCPA Helath* .....	3
CaliforniaChoice® .....	3
CCHP Health Plan.....	3
E.D.I.S. ....	4
Health Net .....	4
Kaiser Permanente* .....	4
MediExcel Health Plan .....	5
Sharp Health Plans .....	5
SIMNSA Health Plan.....	6
Sutter Health Plus.....	6
Total Benefits Solutions (Aetna Int'l.).....	6
United HealthCare.....	7
Western Health Advantage .....	7

# BROKER OF RECORD CHANGE REQUIREMENTS

## Aetna

**Need original Broker of Record change letter on company letterhead or copy ok?**

Aetna requires the request to be on group company letterhead. The request on company letterhead needs to be faxed to 860-754-9010, no DocuSign.

**Send Broker of Record change letter to (dept name + fax # or mailing address)**

Fax: 844.250.9110

[NationalSSCSmallGroup@aetna.com](mailto:NationalSSCSmallGroup@aetna.com)

**Turn around time for processing this change**

7-10 business days

**Does carrier notify existing broker of this requested change?**

As a courtesy, Aetna notifies the broker after the change is processed via letter - advising them that they have been removed as the broker of record at the customer's request

**Effective date for new broker if group does not rescind this change request is prior agent vested? If yes, how long**

1st of the month following receipt

**Is prior agent vested? If yes, how long?**

No

Follow-up on commission questions can be submitted directly to the commission team at [BrokerComm@aetna.com](mailto:BrokerComm@aetna.com)

## Anthem Blue Cross

**Need original Broker of Record change letter on company letterhead or copy ok?**

Copy

A request can be sent on company letterhead, no DocuSign.

**Send Broker of Record change letter to (dept name + fax # or mailing address)**

Sales Support: 877.255.4015

mail to: [producers@elevancehealth.com](mailto:producers@elevancehealth.com)

**Turn around time for processing this change**

7-10 business days

**Does carrier notify existing broker of this requested change?**

Yes

**Effective date for new broker if group does not rescind this change request is prior agent vested? If yes, how long**

1st of the following month

**Is prior agent vested? If yes, how long?**

No

## Blue Shield of California

**Need original Broker of Record change letter on company letterhead or copy ok?**

A Broker of Record Change Form must be signed by the designated group contact and submitted. BSC will accept a letter from the group; however, if any information is missing, the Producer Services team will pend the form.

A broker of record form can be signed using DocuSign. Please ensure that the email trail showing both sent and received messages is included with the request or document. Broker of record change requests can also be submitted directly through the Broker Portal.

**Send Broker of Record change letter to (dept name + fax # or mailing address)**

Sales Support: 877.255.4015

Email to: [producerservices@blueshieldca.com](mailto:producerservices@blueshieldca.com)

**Turn around time for processing this change**

7-10 business days

**Does carrier notify existing broker of this requested change?**

Yes

**Effective date for new broker if group does not rescind this change request is prior agent vested? If yes, how long**

1st of the following month

**Is prior agent vested? If yes, how long?**

No

# BROKER OF RECORD CHANGE REQUIREMENTS

## CalCPA Helath\*

**Need original Broker of Record change letter on company letterhead or copy ok?**

Copy or fax of letter is required

**Send Broker of Record change letter to (dept name + fax # or mailing address)**

Banyan Administrators: fax: 877.237.4519

Email: [calcpahealth@fnrm.com](mailto:calcpahealth@fnrm.com)

**Turn around time for processing this change**

2 business days

**Does carrier notify existing broker of this requested change?**

Yes

**Effective date for new broker if group does not rescind this change request is prior agent vested? If yes, how long**

- If request is received before the 15th of the month, it will be effective on the first of the next month.
- If request is received on or after the 15th of the month, it will be effective on the first of the month following a one month period.
- Please note that this relates to the effective date of commissions. Commissions are paid to the new broker for premiums received on or after the commissions effective date. The broker can start acting on behalf of the firm as soon as we get the request.

**Is prior agent vested? If yes, how long?**

No

## CaliforniaChoice®

**Need original Broker of Record change letter on company letterhead or copy ok?**

Copy

**Send Broker of Record change letter to (dept name + fax # or mailing address)**

Finance: 714.972.7368

**Turn around time for processing this change**

7-14 business days (15 day rescission period)

**Does carrier notify existing broker of this requested change?**

Yes

**Effective date for new broker if group does not rescind this change request is prior agent vested? If yes, how long**

1st of the following month

**Is prior agent vested? If yes, how long?**

Yes - for the first 6 months

## CCHP Health Plan

**Need original Broker of Record change letter on company letterhead or copy ok?**

CCHP requires a BOR change letter on company letterhead that is signed by an authorized representative.

**Send Broker of Record change letter to (dept name + fax # or mailing address)**

Sales Dept:

445 Grant Ave #700, San Francisco, CA 94108

Fax to: 415.955.8819

[brokers@cchphealthplan.com](mailto:brokers@cchphealthplan.com)

**Turn around time for processing this change**

Up to 14 business days

**Does carrier notify existing broker of this requested change?**

Yes

# BROKER OF RECORD CHANGE REQUIREMENTS

**Effective date for new broker if group does not rescind this change request is prior agent vested? If yes, how long**

For House Account (existing group), the new BOR change will not be in effect for Commission until group has reached the renewal month

**Is prior agent vested? If yes, how long?**

No

**E.D.I.S.****Need original Broker of Record change letter on company letterhead or copy ok?**

Copy

**Send Broker of Record change letter to (dept name + fax # or mailing address)**

Broker Services: 888.886.7973

**Turn around time for processing this change**

7-10 days (10 day rescission period)

**Does carrier notify existing broker of this requested change?**

Yes

**Effective date for new broker if group does not rescind this change request is prior agent vested? If yes, how long**

1st of the following month

**Is prior agent vested? If yes, how long?**

No

**Health Net****Need original Broker of Record change letter on company letterhead or copy ok?**

Copy

Or, a request sent on company letterhead. DocuSign is not needed.

**Send Broker of Record change letter to (dept name + fax # or mailing address)**

Single Fax # for SBG Account Management: CA SBG

Statewide Fax: 800.303.3110

**Turn around time for processing this change**

5-7 business days

**Does carrier notify existing broker of this requested change?**

Yes

**Effective date for new broker if group does not rescind this change request is prior agent vested? If yes, how long**

1st of following month

**Is prior agent vested? If yes, how long?**

No

**Kaiser Permanente\*****Need original Broker of Record change letter on company letterhead or copy ok?**

Copy

To add, change, or remove a BOR, an Authorized Representative must submit a [Broker of Record Authorization](#) (for existing groups) or submit a request for the change written on your company's letterhead.

BOR information can be found on this broker website <https://account.kp.org/business/broker/california/working-with-kp/broker-record-information>.

**Send Broker of Record change letter to (dept name + fax # or mailing address)**

Fax Broker of Record changes to: 800.369.8010

For other compensation questions contact Broker Administration at 800.440.2323

The small group form is available on the portal and can be signed electronically. Large accounts are managed through the Account Manager.

# BROKER OF RECORD CHANGE REQUIREMENTS

**Turn around time for processing this change**

7-10 business days.

**Does carrier notify existing broker of this requested change?**

Yes

**Effective date for new broker if group does not rescind this change request is prior agent vested? If yes, how long**

The effective date for your BOR change is dependent on the date we receive your request. The electronic form or letter must be received by the 5th business day for the change to be effective retroactive on the 1st of that month.

**Is prior agent vested? If yes, how long?**

No

## MediExcel Health Plan

**Need original Broker of Record change letter on company letterhead or copy ok?**

MediExcel requires a letter on company letterhead that is signed by an authorized representative.

**Send Broker of Record change letter to (dept name + fax # or mailing address)**

[sales@mediexcel.com](mailto:sales@mediexcel.com)

**Turn around time for processing this change**

48 hours

**Does carrier notify existing broker of this requested change?**

No

**Effective date for new broker if group does not rescind this change request is prior agent vested? If yes, how long**

1st day of month following receipt of notification

**Is prior agent vested? If yes, how long?**

No

## Sharp Health Plans

**Need original Broker of Record change letter on company letterhead or copy ok?**

A signed letter from an authorized contact, on company letterhead.

DocuSign accepted but not to issue agreements.

**Send Broker of Record change letter to (dept name + fax # or mailing address)**

Sales Dept.: 858.499.8246

**Turn around time for processing this change**

7-10 business days

**Does carrier notify existing broker of this requested change?**

Yes

**Effective date for new broker if group does not rescind this change request is prior agent vested? If yes, how long**

1st of following month unless requested during the 1st week of month to be effective that month

**Is prior agent vested? If yes, how long?**

No

\* Please note Kaiser Permanente summary information is contained herein but Kaiser Permanente has not reviewed the information contained within this guide and Word & Brown therefore cannot guarantee its accuracy. Please contact your Word & Brown sales representative in the event of any discrepancies. The information provided in this guide is not intended to describe all of the benefits included in each plan, nor is it designed to serve as the "Evidence of Coverage" or "Certificate of Insurance." The KFHP Evidence of Coverage and the KPIC Certificate of Insurance contain a complete explanation of benefits, exclusions, and limitations.

← Table of Contents

## BROKER OF RECORD CHANGE REQUIREMENTS

## SIMNSA Health Plan

**Need original Broker of Record change letter on company letterhead or copy ok?**

Yes, copy ok and the letter should be provided on company letterhead and include the following:

- Policy Number
- Name of the new broker or agency including their Tax ID number
- Effective date of the new broker or agency
- Signature and Date

**Send Broker of Record change letter to (dept name + fax # or mailing address)**

[RFP@simnsa.com](mailto:RFP@simnsa.com)

**Turn around time for processing this change**

1-2 business days

**Does carrier notify existing broker of this requested change?**

Yes

**Effective date for new broker if group does not rescind this change request is prior agent vested? If yes, how long**

1st of the month unless otherwise requested

**Is prior agent vested? If yes, how long?**

No

## Sutter Health Plan

**Need original Broker of Record change letter on company letterhead or copy ok?**

The letter should be provided on your company letterhead and include the following:

- Policy Number
- Name of the new broker or agency including their Tax ID number

- Effective date of the new broker or agency

- Signature and Date

Copy ok

**Send Broker of Record change letter to (dept name + fax # or mailing address)**

Sutter Health Plan Service Team

855.315.5800

[SHPSERVICEteam@sutterhealth.org](mailto:SHPSERVICEteam@sutterhealth.org)

**Turn around time for processing this change**

3-5 business days provided new BOR is appointed with SHP

**Does carrier notify existing broker of this requested change?**

Yes

**Effective date for new broker if group does not rescind this change request is prior agent vested? If yes, how long**

1st of following month

**Is prior agent vested? If yes, how long?**

No

## Total Benefits Solutions (Aetna Int'l.)

**Need original Broker of Record change letter on company letterhead or copy ok?**

The letter should be provided on your company letterhead and include the following:

- Policy Number
- Name of the new broker or agency including their Tax ID number
- Effective date of the new broker or agency
- Signature and Date

Copy ok

DocuSign is accepted; the group must be on company letterhead with the pertinent information.

**BROKER OF RECORD CHANGE REQUIREMENTS****Send Broker of Record change letter to (dept name + fax # or mailing address)**

Please email your request to [globalrenewals@tbsmga.com](mailto:globalrenewals@tbsmga.com)

**Turn around time for processing this change**

3-5 business days

**Does carrier notify existing broker of this requested change?**

Yes

**Effective date for new broker if group does not rescind this change request is prior agent vested? If yes, how long**

Broker of record effective date will be what is listed on the BOR letter. For commission purposes, will be 1st of the month following receipt of the change request

**Is prior agent vested? If yes, how long?**

No

Or, request sent on company letterhead and signed by authorized employer contact. DocuSign is not needed.

**United HealthCare****Need original Broker of Record change letter on company letterhead or copy ok?**

Copy

**Send Broker of Record change letter to (dept name + fax # or mailing address)**

Group Size 2-100: Renewal Account Executive

**Turn around time for processing this change**

10 business days

**Does carrier notify existing broker of this requested change?**

Yes

**Effective date for new broker if group does not rescind this change request is prior agent vested? If yes, how long**

1st of following month

**Is prior agent vested? If yes, how long?**

No

[← Table of Contents](#)

**Western Health Advantage****Need original Broker of Record change letter on company letterhead or copy ok?**

Copy

**Send Broker of Record change letter to (dept name + fax # or mailing address)**

Sales Department

Fax: 916.568.1338 or via email: [WHASales@westernhealth.com](mailto:WHASales@westernhealth.com)

**Turn around time for processing this change**

3-5 business days

**Does carrier notify existing broker of this requested change?**

Yes

**Effective date for new broker if group does not rescind this change request is prior agent vested? If yes, how long**

1st of following month

**Is prior agent vested? If yes, how long?**

No