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| **BROKER – INDIVIDUAL SALES MEDICAL ENROLLMENT AND/OR HSA ELIGIBILITY & INITIAL PAYMENT** | |
| **DocuSign Link** | **Broker Process** |
| **IH Individual Market Broker Attestation, Enrollment Application and Premium Invoice** | * Broker clicks on hyperlink button to open forms once their client is ready to enroll. * Broker enters their name and email address, then the applicant’s name and email address on the front page. * Broker clicks “Begin Signing” and then enters the Producer Name and Broker Firm Name on the Broker Attestation Form. * Broker clicks on the “Finish” tab at the top of the screen and the packet automatically routes to the applicant. * Applicant completes the Broker Attestation, Enrollment Application and Premium Invoice forms. * Applicant clicks on the “Finish” button at the top of the screen and the packet automatically routes to Independent Health for processing. |
| **IH Individual Market Broker Attestation** | * Broker clicks on hyperlink button to open forms once their client is ready to enroll. * Broker enters their name and email address, then the applicant’s name and email address on the front page. * Broker clicks “Begin Signing” and then enters the Producer Name and Broker Firm Name on the Broker Attestation Form. * Broker clicks on the Finish tab at the top of the screen and the document automatically routes to the applicant. * Applicant completes the Broker Attestation form. * Applicant clicks on the “Finish” button at the top of the screen and the document automatically routes to Independent Health for processing. |
| **IH Individual Market Broker Attestation,**  **Enrollment Application, Premium Invoice and**  **HSA Eligibility Form** | * Broker clicks on hyperlink button to open forms once their client is ready to enroll. * Broker enters their name and email address, then the applicant’s name and email address on the Power Form Signer Information page then clicks “Begin Signing”. * Broker clicks “GOT IT”, then “CONTINUE” and enters the Producer Name and Broker Firm Name on the Broker Attestation Form. * Broker clicks on the “Finish” tab at the top of the screen and the packet automatically routes to the applicant. * Applicant completes the Broker Attestation, Enrollment Application, Premium Invoice and HSA Eligibility (if interested and eligible) forms. * Applicant clicks on the “Finish” button at the top of the screen and the packet automatically routes to Independent Health for processing. |
| **IH Individual Market Premium Invoice** | * Broker clicks on hyperlink button to open form. * Broker enters their name and email address, then the applicant’s name and email address on the Power Form Signer Information page then clicks “Begin Signing”. * Broker clicks “GOT IT”, then “CONTINUE” and enters the “Invoice Date”, “Plan Name” and “Monthly Premium”. They may also enter the Applicant’s “Name” and “Address” if they choose. * Broker clicks on the “Finish” tab at the top of the screen and the packet automatically routes to the applicant. * Applicant completes their “Name” and “Address” boxes if empty, then enters the “Payment Amount” and clicks on the “FINISH” button at the top to enter their credit card or bank account information. * Applicant clicks on the “Finish” button at the top of the screen and the packet automatically routes to Independent Health for processing. |
| **IH ICHRA Broker Attestation and Enrollment Application** | * Broker clicks on hyperlink button to open forms once their client is ready to enroll. * Broker enters their name and email address, then the applicant's name and email address on the front page. * Broker clicks "Begin Signing" and then enters the Producer Name and Broker Firm Name on the Broker Attestation Form. * Broker enters the Account Number and Sub Account (if applicable) on the Enrollment Application. * Broker clicks on the "Finish" tab at the top of the screen and the packet automatically routes to the applicant. * Applicant completes the Broker Attestation and Enrollment Application forms. * Applicant clicks on the "Finish" button at the top of the screen and the packet automatically routes to Independent Health for processing. |
| **IH ICHRA HSA Eligibility Form** | * Applicant clicks on hyperlink button to open form. * Applicant enters their name and email address on the PowerForm Signer Information page then clicks “Begin Signing”. * Applicant clicks “GOT IT”, then “CONTINUE” and enters the required information at the bottom of page 2. * Applicant clicks on the “Finish” button at the top of the screen and the packet automatically routes to Independent Health for processing. |