



UTAH INSURANCE DEPARTMENT

Health Discount Program – Marketer Application Checklist

Applicant Name: _____ **EIN:** _____

- Applicants must submit accurate and complete information.
 - Every item listed must be initialed or marked N/A (Not Applicable)
- Information must be emailed to: hdp@utah.gov Department.

- _____ Completed and signed application.
- _____ Fee paid upon receipt of invoice (*emailed to you once the application is received*) [\[R90-102-7\]](#) *Section 1*
- _____ Application must be sworn to by an officer or authorized representative of the Company. [\[§31A-8a-201\(2\)\(b\)\]](#) *Section 6*
- _____ Toll free phone number for members to call. [\[R590-152-7\(1\)\]](#) *Section 2*
- _____ Evidence of compliance that a person is authorized to transact business in Utah. [\[§31A-8a-201\(1\)\(a\) and R590-152-3\(2\)\]](#) [\[Division of Corporations and Commercial Code\]](#) *Section 3-1*
- _____ Executed copy of the Articles of Incorporation with an executed copy of the bylaws or other enabling documents that establish the organizational structure. [\[§31A-8a-201\(2\)\(b\)\(i\)\]](#) *Section 3-2*
- _____ Complete list of principals. [\[31A-8a-201\(2\)\(b\)\(ii\)\(A\)\]](#) *Section 3-3*
- _____ Biographical affidavits. *Section 3-4*
- _____ List of managers/supervisors. *Section 3-5*
- _____ Applicable background question documentation. *Section 3-6*
- _____ List of other licenses and license information in other jurisdictions. *Section 3-7*
- _____ Explain the enrollment process. *Section 4-1 (1.)*
- _____ Provide evidence and a description of cancellation and refund policies, and show compliance with §31A-8a-205.5 Free look right. [\[31A-8a-205, 205.5; R590-152-6\(3\), R590-152-11\(1 & 4\)\]](#). *Section 4-1 (2.)*
- _____ Dispute Resolution Procedures. [\[31A-8a-203\(2\)\(c\); R590-152-13\]](#). *Section 4-1 (3.)*
- _____ Fee Schedule. [\[R590-152-6\]](#) *Section 4-2*
- _____ Distribution and marketing plan details - all advertising and marketing material to include website material. [\[31A-8a-203, 204, 205, 206; R590-152-7, 8, 9, 10, 11, & 13\]](#) *Section 4-3*
- _____ Operator contracts. [\[31A-8a-203\(1\)\(a\)\(ii\), 31A-8a-204\(2\)\(a\)\]](#) *Section 5-1*
- _____ Disclosures. [\[31A-8a-204, 205, 205.5, 206; R590-152-11\]](#)
- _____ Acknowledgement and certification. *Section 6*