



UTAH INSURANCE DEPARTMENT

Health Discount Program – Operator Application Checklist

Applicant Name: _____ **EIN:** _____

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

- ___ Completed and signed application.
- ___ Fee paid upon receipt of invoice (*emailed to you once the application is received*) [[R590-102-7](#)] *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 entity. *Section 4-1*
- ___ Explain the enrollment process. *Section 4-2 (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 4-2 (2.)*
- ___ Dispute Resolution Procedures. [[31A-8a-203\(2\)\(c\)](#); [R590-152-13](#)]. *Section 4-2 (3.)*
- ___ Fee Schedule. [[R590-152-6](#)] *Section 4-3*
- ___ 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 4-4*
- ___ Provider contracts. [[31A-8a-203 & 206](#); [R590-152-12](#)] *Section 5-1*
- ___ Marketer contracts. [[31A-8a-203\(1\)\(a\)\(ii\)](#), [31A-8a-204\(2\)\(a\)](#)] *Section 5-2*
- ___ Marketer list on the form provided in the application package. *Section 5-2*
- ___ Disclosures. [[31A-8a-204](#), [205](#), [205.5](#), [206](#); [R590-152-11](#)]
- ___ Acknowledgement and certification. *Section 6*