

DOs and DON'Ts of ConnectiCare® SOLO

- DO**
1. Make sure all paper forms are completed in ink. Incomplete forms may be returned to the producer.
 2. If your client adds any missing information, have them re-sign and re-date the Individual Application/Change Form and the Individual Health Statement. This verifies that the added information is correct.
 3. Have your client sign and date any attachments to the Individual Application/Change Form and/or the Individual Health Statement.
 4. Include proof of legal guardianship (an appointment by the Probate Court), if applicable.
 5. If applicable, have your client complete and submit a Domestic Partner Verification Form or other satisfactory verification.
 6. Include the completed Electronic Funds Transfer (EFT) form and a voided bank check if EFT is chosen for future payments.
 7. Be sure a medical plan and pharmacy option have been selected on the Individual Application/Change Form.
 8. Be sure the agent and agency name have been included for commission purposes.
 9. Broker Authorization Form (optional) – Allows you to have access to information, including personal health information, to assist your client through the underwriting process. The form must be signed by the applicant and received by ConnectiCare in order for you to have access to this information.
 10. Discuss with your client the importance of setting up an HSA account so it coincides with the effective date of their HSA-compatible health plan. If your client chooses to pay for a claim using HSA dollars, the account must have been opened prior to the date of the claim.

- DON'T**
1. Do not complete an application—paper or online—for your client.
 2. Do not date or sign an application—paper or online—for your client.
 3. Do not use correction fluid on paper applications. If the applicant has made a change, they need to initial and date the application at the place where the change was made OR complete a new, correct application.
 4. Do not send an invitation for online application to your own e-mail address, except when a client does not have their own e-mail. If the client has no e-mail and you do send an invitation for online application to your own e-mail address, you still need to have the client sign and date the Individual Application/Change Form and the Underwriting Authorization Form. You cannot sign these forms for your client.



By following these DOs and DON'Ts, you can help make the ConnectiCare SOLO application process as smooth as possible for you and your clients. If you have any questions, please contact the ConnectiCare SOLO Sales Support Team at 1-800-723-2986.