New Producer Appointment Checklist

Please submit appointment paperwork prior to quoting business to ensure that commissions are not delayed.

☐ Producer Application
   Individual producers seeking appointment must complete and submit the Producer Application. Individual information should be entered in Section 1 and Agency information should be entered in Section 2. Check that all information on the form is complete and legible.

☐ Agent Agreement
   Independent producer must sign an Agent Agreement. If a producer works with an agency that is also seeking an appointment, the agreement must be completed by the authorized agency representative, only one agreement is required for an agency.

☐ Direct Deposit Authorization Forms
   Commission payments will be electronically deposited in the bank account of the payee’s choice. All new payees must submit the Direct Deposit Authorization and a W-9 tax form.

☐ License and Marketplace Certification Copies
   All producers seeking appointment must provide a current copy of their Accident, Life, and Health (or equivalent) license and if applicable a copy of the agency's license, as well as a copy of the current E&O. For producers selling plans through the FFM a Marketplace Certification is also required.

☐ Signatures
   Verify that all appropriate forms are signed and dated. Forms that require a signature are the Producer Application, Agent Agreement, and New Vendor Add Request.

Appointment information may be faxed, emailed or mailed.

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