

How to Make Payments on Behalf of Clients

The broker portal allows brokers to make one-time payments on their clients' behalf, save client payment methods and enroll clients in monthly autopay. Each of these are outlined below. Please note that your clients can also make one-time payments, save their payment method information and enroll in autopay on their own, all within the member portal. Should a client take any of these actions within the member portal, it will be automatically reflected in your broker portal, and vice versa.

NOTE: Individual Book of Business illustrations are reflected throughout this guide with sample data, the processes work the same for Medicare payments.

To Make a One-Time Payment

- Log in to the broker portal
- Select either Individual Book or Medicare Book to view your Book of Business
- From the Book of Business next to each client, you can see their total premium amount, policy status and the ability to make a one-time payment
- Select the **Make a payment** button and enter the payment amount, payment method and member email address where payment confirmation should be sent
- After payment is made, allow 24 hours for payment to reflect an updated policy status in the portal

The screenshot displays the OSCAR broker portal interface. On the left, a table titled "Individual book of business" lists 13 policy records for John Doe. Each record includes the plan name, coverage dates, premium amount, and policy status (all marked as "Unpaid binder"). A "Make a payment" button is visible next to each record. On the right, a modal form titled "Make a payment for John Doe" is open, showing the payment process steps: 1. Payment amount (with a selected amount of \$520.50), 2. Payment method, and 3. Email confirmation. A "Submit payment" button is at the bottom of the modal.

Policy holder	Plan name	Coverage	Premium	Policy status	Action
John Doe 123456789-01 (1 member)	Health First GYM ACCESS Bronze HMO 60 1656	January 1, 2022 December 31, 2022	\$330.47	Unpaid binder	Make a payment
John Doe 123456789-01 (2 members)	AdventHealth Bronze HMO 100 1776	January 1, 2022 December 31, 2022	\$890.61	Unpaid binder	Make a payment
John Doe 123456789-01 (2 members)	Health First GYM ACCESS Silver HMO 100 1664	January 1, 2022 December 31, 2022	\$1,302.39	Unpaid binder	Make a payment
John Doe 123456789-01 (2 members)	Health First GYM ACCESS Silver HMO 80 1688	January 1, 2022 December 31, 2022	\$2,574.25	Unpaid binder	Make a payment
John Doe 123456789-01 (2 members)	AdventHealth Bronze HMO 60 1752	January 1, 2022 December 31, 2022	\$520.50	Unpaid binder	Make a payment
John Doe 123456789-01 (1 member)	AdventHealth GYM ACCESS Catastrophic HMO 1748	January 1, 2022 December 31, 2022	\$183.17	Unpaid binder	Make a payment
John Doe 123456789-01 (2 members)	Health First Silver HMO 65 1806 Zero Cost-Share	January 1, 2022 January 31, 2022	\$2,789.89	Unpaid binder	Make a payment

To Save Member Payment Method

- To save a client's payment method for future use, click on the individual policy record from the Book of Business and navigate to the **Billing & payments** tab
- Under the **Saved payment method** section, click on **Add a payment method**
- You will be prompted to enter either the client bank account information or credit card information
- The system will store and save the last payment method used whether bank account information or credit card information

The screenshot shows the OSCAR member portal for John Doe. The 'Billing & payments' tab is selected. A modal titled 'Choose payment method' is open, showing options for 'Bank account' and 'Debit or credit card'. The 'Debit or credit card' option is selected, and a 'Continue' button is visible. Below the modal, the 'Saved payment method' section shows an 'Add a payment method' button. The 'Paperless billing' toggle is currently 'Off'.

Premium month	Coverage period	Amount due	Status
January 2022	01/01 - 01/31	\$183.17	Due 01/01

Brokers to Enroll Member in Autopay

- To enroll a client in monthly autopay, follow the same steps to save a payment method outlined above
- After entering either the client bank account information or credit card information, change **Enroll in Autopay** from Off to On and click **Save**
- A payment for your client's monthly premium will be made from their saved payment method on the last day of every month

The screenshot shows the 'Enter debit or credit card information' form. The 'Enroll in AutoPay' toggle is highlighted with a red box and is currently 'Off'. The form includes fields for 'Name on card', 'Card number', 'Expiration date', and 'Billing zip code'. A 'Save' button is visible at the bottom right.

For questions, contact Broker Support at **877.693.6489** or **hf-brokers@plusoscar.com**