

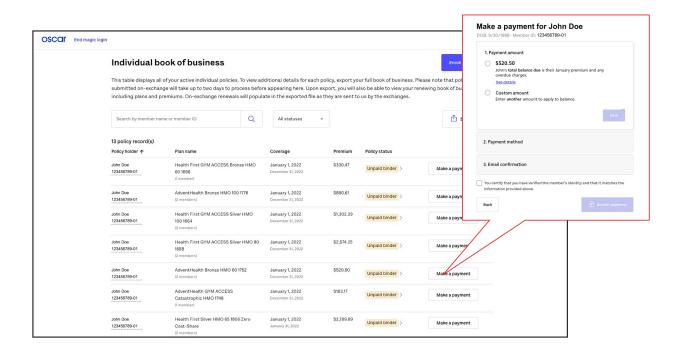
How to Make Payments on Behalf of Clients

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.

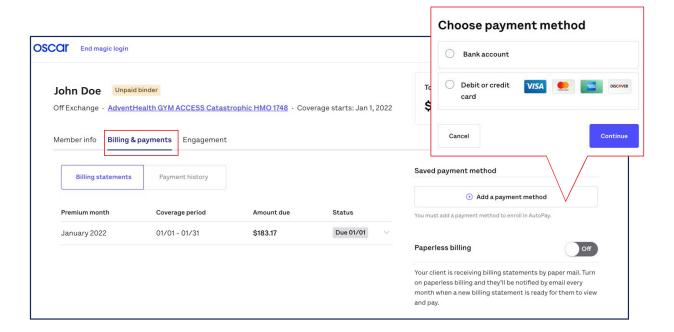
To Make a One-Time Payment

- 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



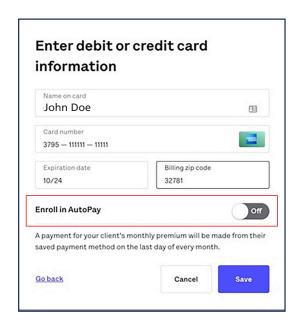
To Save Member Payment Method

- 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



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



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