



## Appointment Instructions

If you have questions about the process or an agent's appointment status, please send an email to [brokers@hioscar.com](mailto:brokers@hioscar.com)

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### **Appointing agents (writing independently)**

Please complete the application using Chrome, Firefox, or Safari. Before getting started, make sure you have the below items - you'll need each of these to complete the appointment application:

- NPN
- State License(s) Number
- Bank account details (or an address) of the agency for payment
- E&O policy (\$1M/\$1M)

The process should take 5-10 minutes and you can get started by following this [link](#).

### **Instructions**

1. **Basic Info:** enter your name, contact info, and business mailing address. Then proceed to the next section.
2. **Locations:** Oscar will appoint you for OH and any other state where you intend to sell policies. Select "No" when asked "Would you like to appoint an agency?" and select your General Agency from the GA dropdown.
3. **Payment:** commissions will be paid directly to you via ACH deposit - please be prepared to input a routing and account number for the your preferred direct deposit account and make sure to select "No" when asked "are you assigning commissions to an agency?"
4. **Documents:** Oscar requires a valid E&O policy to write policies. You can upload a scan or PDF of that document at this stage.
5. **Sign:** the final step in the process will require you to e-sign contracts for each state you wish to be appointed in.

You'll receive an email from Oscar within one week of completing the appointment application. The email will include either a confirmation of appointment or ask for additional info in order to process the appointment.

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### **Appointing an agency & principal**

Please complete the application using Chrome, Firefox, or Safari. Before getting started, make sure you have the below items - you'll need each of these to complete the appointment application:

- NPN
- State License(s) Number
- Legal Agency Name
- Agency NPN
- Agency State(s) License Number
- Bank account details (or an address) of the agency for payment

- E&O policy (\$1M/\$1M; note that agents can use the Agency's E&O if it covers employees)

The process should take 5-10 minutes and you can get started by following this [link](#).

### **Instructions**

1. **Basic Info:** enter your name, contact info, and business mailing address. Then proceed to the next section.
2. **Locations:** Oscar will appoint both you and your agency. Select "Yes" when asked "Would you like to appoint an agency?" and select your General Agency from the GA dropdown.
3. **Payment:** commissions will be paid directly to you via ACH deposit - please be prepared to input a routing and account number for the agency and make sure to select "Yes" when asked "are you assigning commissions to an agency?"
4. **Documents:** Oscar requires each broker have a valid E&O policy to write policies. You can upload a scan or PDF of that document at this stage.
5. **Sign:** the final step in the process will require you to e-sign contracts for each state you and your agency wish to be appointed in.

You'll receive an email from Oscar within one week of completing the appointment application. The email will include either a confirmation of appointment or ask for additional info in order to process the appointment.

### **Appointing agents (writing through an agency)**

Your agents will follow the same link and flow as above - they'll need the below items to complete the process:

- NPN
- State License(s) Number
- Legal Agency Name
- Agency NPN
- E&O policy (\$1M/\$1M; note that agents can use the Agency's E&O if it covers employees)

A few notes and reminders before sending the instructions to your agents:

- Each agent's GA selection should match your GA selection
- Provide each agent with the legal name and NPN of your agency for commission assignment

### **Agent Instructions**

1. **Basic Info:** enter your name, contact info, and business mailing address. Then proceed to the next section.
2. **Locations:** Oscar will appoint each agent for OH and any state where they intend to sell policies. Agents should select "No" when asked "would you like to appoint an agency?" and select the same General Agency as the agency did from the GA dropdown.
3. **Payment:** agent commissions will still be paid directly to the agency via ACH deposit. Agents should select "Yes" when asked "are you assigning commissions to an agency?" then input the below information for commission assignment:
  - Legal Agency Name
  - Agency NPN
4. **Documents:** Oscar requires each broker have a valid E&O policy to write policies. They can upload a scan or PDF of that document at this stage.

5. **Sign:** *the final step in the process will require the agent to e-sign contracts for each state they wish to be appointed in.*

*Agents will receive an email from Oscar within one week of completing the appointment application. The email will include either a confirmation of appointment or ask for additional info in order for us to process the appointment.*