

ICHRA Process

1 Employer decides:

- Who is eligible to participate
- Contribution amount
- What expenses are eligible

2 MEDSURETY provides:

- Model notice
- Plan documents and cafeteria plan document

3 Employer provides:

- Completed Employer Intake Guide
- Completed employee template with employee email, phone number, demographic, contribution and election information

4 Employee completes:

- The ICHRA enrollment and /or payroll deduction election form

5 MEDSURETY assists employees with purchasing healthcare policy through Shoreline Insurance Group

(steps continued on next page)



EMPLOYEE INDIVIDUAL COVERAGE ENROLLMENT PROCESS WITH SHORELINE

1. Employee receives Shoreline Welcome Email and submits online Quote Request Form. **The online form requests all the necessary info needed to put together health plan recommendations for the employee, and their dependents.**
2. Within 24 hours of requesting a quote, employee will receive a tailored plan from Shoreline. **Plan will have recommendations that best suit employee indicated needs and provided information.**
3. Employee discusses recommendations with Shoreline Crew to address questions and make a final health plan selection.

Phone: 952-492-5013

Email: [Shoreline Crew](#)

Shoreline is available to answer questions related to employee policy selection and help review plans each year during the Open Enrollment Period (Nov-Dec 15th).

4. Employee completes and submits application for selected carrier with assistance of the Shoreline Crew.
5. Employee pays health plan premium.
Note: Some insurance carriers will require payment with the application while others will send an invoice once enrollment has been processed.
6. Shoreline provides proof of coverage to Medsurety for ICHRA reimbursement.



6 MEDSURETY manages:

- ICHRA contribution amounts
- Employer and Employee payroll deductions

7 Employees attest to having individual health insurance by submitting proof of purchase to MEDSURETY:

- Via mobile app, snap picture and upload to account
- Scan and send via secure email to customerservice@medsurety.com
- Fax: 952-856-2656

8 MEDSURETY reviews and reimburse employees' premiums or pays carriers

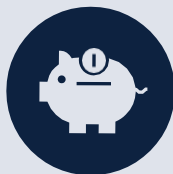
9 Employee pays their insurance carrier



At A Glance:



**SELECT
APPROPRIATE
POLICY**



**PURCHASE
HEALTH
POLICY**



**PROOF OF
PURCHASE IS
SUBMITTED**



**ELECTRONIC
REIMBURSEMENT
VIA ACH**



**EMPLOYEE
RECEIVES FUNDS**



**EMPLOYEE PAYS
INSURANCE
CARRIER**



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