HTA Referral Process for Group Health Brokers

Step 1: Provide Employer Information

Send the following details to Kathy Bretzel to start the referral proces

Employer name & HR contact (name, phone, email):
Address:
Total number of employees:
HSA offered: (Yes/No)
Plan renewal month:
GHP Rx Part D creditable: (Yes/No)

Send an email to **kbretzel@hta-insurance.com** to let her know you have a client you'd like to connect with our Medicare Services team.

Step 2: Schedule An Intro Call

Schedule a short Intro Zoom Meeting (20–30 min) to review HTA's Employer Medicare Services. Scheduling an introduction call helps us align on goals and create a customized approach for your client.

- CLICK HERE to schedule

HTA is happy to join weekly client calls for an introduction—contact us by email or phone to coordinate.

Step 3: Client Follow-Up

After the introduction, HTA will send a follow-up email to the client (copying the advisor) with helpful resources:

- Employer Medicare Services
- Employee Medicare Services
- HTA Roadmap to Medicare Webinar *(for HR use only)*
- Roadmap to Medicare Process
- Client Brochure
- Co-branded Webpage *(provide company png or pdf logo)*

BD team follows up two weeks post-intro to answer questions and offer the Roadmap to Medicare Webinar.
HTA keeps clients updated through Levitate email communications on Medicare and HTA updates.