



Uhceservices.com Reference Guide for Brokers



About this Document

This guide is designed for **Brokers** with access to uhceservices.com.

It provides information on how to navigate uhceservices.com, where you find specific information and how to perform tasks relevant to brokers, including:

- Access to small group quoting and renewals and small group renewal packages (PDF documents) information
- Enrolling and updating member information, including terminating members and requesting or printing health plan ID cards
- Billing and payment information
- Member and subscriber lists and access to Member and Employer Handbooks, and Summaries of Benefits and Coverage (SBC)
- View commissions
- Viewing benefits for a specific plan
- Resources to find helpful information

This web site is no longer supported for Internet Explorer and Firefox. Use Microsoft Edge, Chrome or Safari for the best experience. Also, clearing your cache may improve your experience.

Using this Document

Click any topic in the [Table of Contents](#) to jump to that topic.

Click the [TABLE OF CONTENTS](#) link in the top right corner of each page to return to the Table of Contents.



Table of Contents

1 How to Register: Email Invitation	6
1 How to Register: Login Re-Direct from United eServices (UeS)	13
1 Access and Log In with OneHealthcare ID	17
1 Access: New to Site.....	18
1 Access: Lost or Expired Invitation	20
2 Home.....	21
3 Quickly Access Your Management Tools	23
4 Gear Icon	24
4 Invite User	25
4 Manage User	27
4 Re-Invite a User	28
4 My Settings	30
4 Manage Broker	31
4 Manage My Profile	33
4 Roles and Permissions (My Associations).....	36
4 View and Update Broker Contact Information	37
4 Update a User’s Account Overdue Balance Alert Preferences	38
4 Message Center	39
5 Group Selection	40
5 Group Selection: PEO Groups.....	41
6 Small Group Quoting & Renewals	42
6 Help Me Decide	43
6 Quick Links: Small Group Renewal Packages.....	46
6 Quick Links: Upload Documents	49
6 Quick Links: United eServices (UeS).....	51
6 Quick Links: MyAllSavers (Level Funded).....	53
6 Quick Links: SAM	54
6 Quick Links: UHC Benefit Services (COBRA)	55
6 Small Group Quoting & Renewal (Fully Insured and Level Funded).....	56



7 Manage Members.....	57
7 Member Search / View Member	58
8 Enroll Member	59
8 Enroll Member: Demographics	60
8 Enroll Member: Coverage - Medical	63
8 Enroll Member: Coverage - Specialty, Basic Life and AD&D	65
8 Enroll Member: Review & Submit.....	66
7 Update Member.....	67
7 Terminate a Member’s Coverage	70
7 Request a Health Plan ID Card.....	74
8 Request Health Plan ID Cards for Entire Group (Level Funded Groups).....	76
7 Reinstate Member	77
8 Billing & Payment	80
8 Billing & Payment: Pay as Billed	81
8 Billing & Payment: Go to Billing Home	83
9 Reports	84
9 Member & Subscriber Lists.....	85
9 MLR Reporting.....	88
9 Account Overdue Balance Report	89
9 Banking Reports	91
9 Level Funded	93
9 Shared Saving Reports.....	94
9 Claims Experience Reporting	95
9 Subrogation Reports	96
9 Claim Level Payment Integrity Reports.....	97
10 Plan & Rate Information	98
10 View Benefits.....	100
10 Summary Benefit Coverage.....	101
10 Member Handbook.....	102
10 Employer Handbook.....	103



11 Resources.....	104
11 Benefit Summaries & SBCs.....	105
11 Forms.....	107
11 Product Grids and Networks Documents.....	108
11 Marketing Materials	109
11 Find a Provider.....	110
11 Training Materials	123
11 Employee Engagement Planner	124
11 Upload Documents	127
11 View Uploaded Documents	129
12 Commissions	130
14 Other Applications	131
Appendix: Broker Roles and Permissions	132
Appendix: Employer Roles and Permissions	133



1 | How to Register: Email Invitation

NOTE: UnitedHealthcare has taken important steps to modernize tools and resources, simplify administration and bring new products to market quicker. To support this strategy, brokers will use uhceservices.com, our new broker and employer website, to access capabilities currently on United eServices® and myallsavers.com. The uhceservices.com site will play a critical role in delivering a more consolidated, streamlined, and user-friendly UnitedHealthcare experience for users.

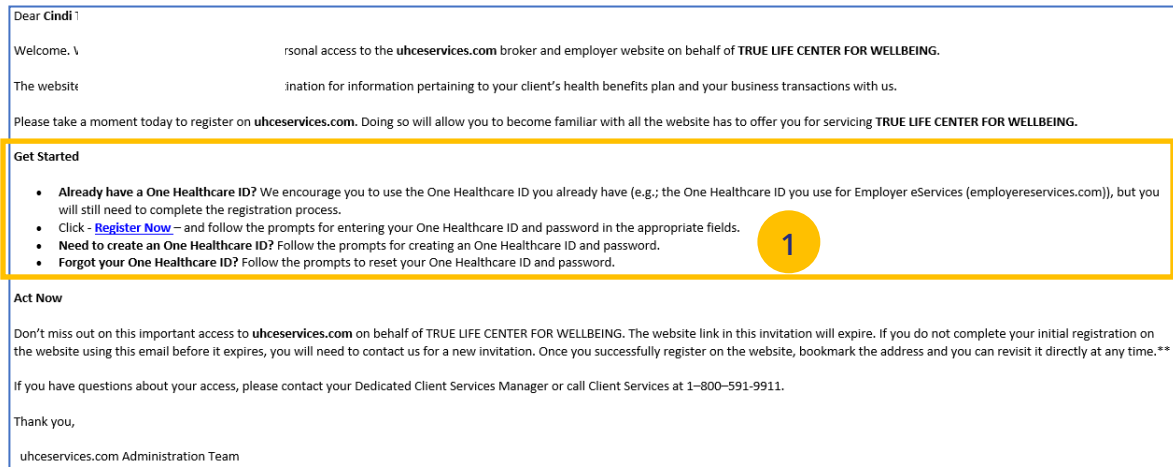
This only applies to Brokers and General Agents. Separate guides are available for Employers and Internal Sales & Account Management.

Employers are invited to uhceservices via email. Brokers can be invited in two ways:

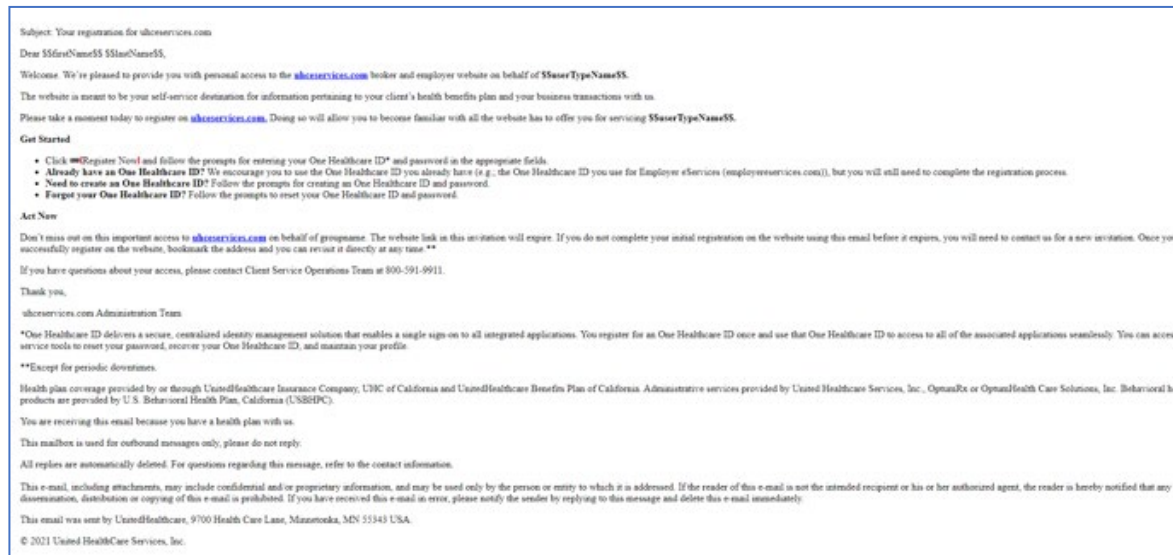
1. Email invitation
2. Login re-direct from United eServices

Follow these steps to register for uhceservices after receiving an email invitation.

1. When you receive your email invitation, click the **Register Now** link within the email. The **Create One Healthcare ID screen displays.**
Note: If you already have a One Healthcare ID, click the **Sign in now** link in the **Already have One Healthcare ID** box. You will go to the Sign In screen where you can sign in with your existing ID.



Email Invitation to Brokers and Employers (Cirrus)



Email Invitation to Brokers and Employers (UnitedHealthcare HMO)




1 | How to Register: Email Invitation (continued)

2. Complete the **Profile Information** that includes your **First Name, Last Name** and **Year of birth**.

Create One Healthcare ID

One Healthcare ID securely manages your account so that you can use one One Healthcare ID and password to sign in to all integrated applications.

 Already have One Healthcare ID? [Sign in now](#)

Profile Information

First name

Last name

Year of birth

2

?




1 | How to Register: Email Invitation (continued)

- 3. Enter information in the **Sign In Information** section.


Sign In Information

Your email address


Create One Healthcare ID

Your One Healthcare ID must have:

- 6 to 50 characters
- At least one letter 
- No spaces
- No letters with accents
- None of these Symbols: % + " & [\] ^ ' { | } < > # , / ; () : * = ~


Create password

Your password must have:

- Between 8 and 100 characters
- At least 1 uppercase letter
- At least 1 lowercase letter
- At least 1 number
- No spaces and no & symbol

Type password again



1 | How to Register: Email Invitation (continued)

4. Enter your **Security Questions and Answers**. These will be used to verify your identity when you sign in to uhceservices.
5. Click **I Agree**. You have completed the process to create your One Healthcare ID.

Security Questions and Answers 4

Security question 1

Security answer 1

Security question 2

Security answer 2

Security question 3

Security answer 3

You must agree to the [Terms of Use](#) and [Website Privacy Policy](#) to use the One Healthcare ID service. If you do not agree, click Cancel and do not use any aspect of the One Healthcare ID service.

5



- 6. Check your email box for an email from One Healthcare ID. You can:
 - o Enter the 10-digit activation code to verify your email address and click **Next**, or
 - o You can click the activation link in the email.

Next Step: Verify Your Email Address

1. **Check your email inbox** (chi*****i1@optum.com) for a message from One Healthcare ID (noreply@onehealthcareid.com).
2. **Click on the activation link** in the email or [enter the 10-digit activation code](#).

10-digit activation code

6

Still waiting for your activation code? [Resend email](#) or [update email address](#)

If you don't see it, check your junk or spam folders. You may need to resend the message or add our address to your approved senders.

If you'd like assistance, contact support at 1(855)819-5909 or optumsupport@optum.com

Confirm your One Healthcare ID email address

OH One Healthcare ID-NoReply <noreply@onehealthcareid.com>
To Chintakayala Bhavani Thu 3/25/20
Retention Policy UHGInbox (90 days) Expires 6/23/2021

One Healthcare ID

Your One Healthcare ID

 6

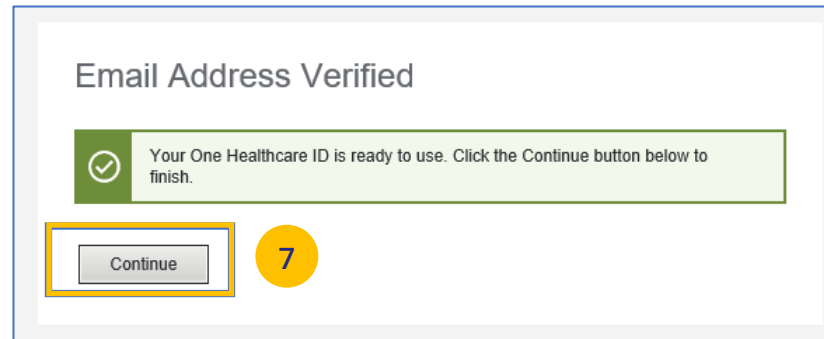
If you prefer, copy this 10-digit code 1571003356 and paste it into the box for the activation code on the Activate Your One Healthcare ID page.

If you did not request an activation link or code, or if you have questions about setting up an One Healthcare ID, contact us at 1(855)819-5909 or optumsupport@optum.com.

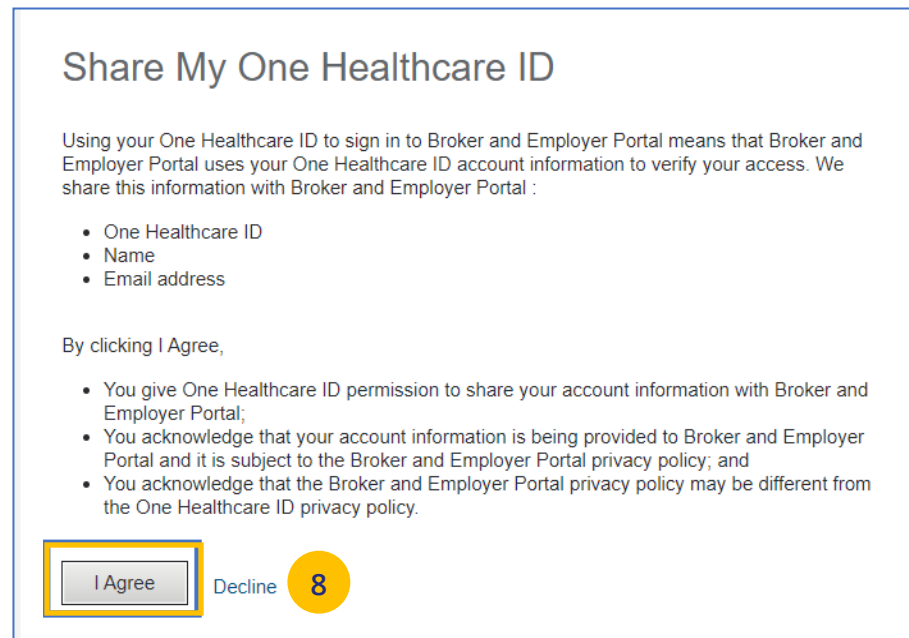


1 | How to Register: Email Invitation (continued)

7. Click **Continue**.
8. Click **I Agree** to agree to share your One Healthcare ID information with the Broker & Employer (B&E) portal.



The screenshot shows a confirmation screen titled "Email Address Verified". At the top, there is a green checkmark icon in a square, followed by the text: "Your One Healthcare ID is ready to use. Click the Continue button below to finish." Below this message is a button labeled "Continue" which is highlighted with a yellow border. To the right of the button is a yellow circle containing the number "7".



The screenshot shows a screen titled "Share My One Healthcare ID". The text reads: "Using your One Healthcare ID to sign in to Broker and Employer Portal means that Broker and Employer Portal uses your One Healthcare ID account information to verify your access. We share this information with Broker and Employer Portal :". Below this is a bulleted list of shared information:

- One Healthcare ID
- Name
- Email address

Below the list, it says "By clicking I Agree," followed by another bulleted list of terms:

- You give One Healthcare ID permission to share your account information with Broker and Employer Portal;
- You acknowledge that your account information is being provided to Broker and Employer Portal and it is subject to the Broker and Employer Portal privacy policy; and
- You acknowledge that the Broker and Employer Portal privacy policy may be different from the One Healthcare ID privacy policy.

At the bottom, there are two buttons: "I Agree" (highlighted with a yellow border) and "Decline". To the right of the buttons is a yellow circle containing the number "8".



1 | How to Register: Email Invitation (continued)

- You will be asked to attest to the **Terms of Use** and **Privacy Policy**. You need to select each document which will open the document for you to review. Once you open each document and select the corresponding checkboxes, the **Agree** button will be enabled.
- Click **Agree**. You are now ready to use uhceservices.com.

Attestation

Please click each document link to enable the checkbox.

I have read and agree to the [Terms of Use](#) ←

I have read and agree to the [Privacy Policy](#) ←

Click each link



1 | How to Register: Login Re-Direct from United eServices (UeS)

What is happening?

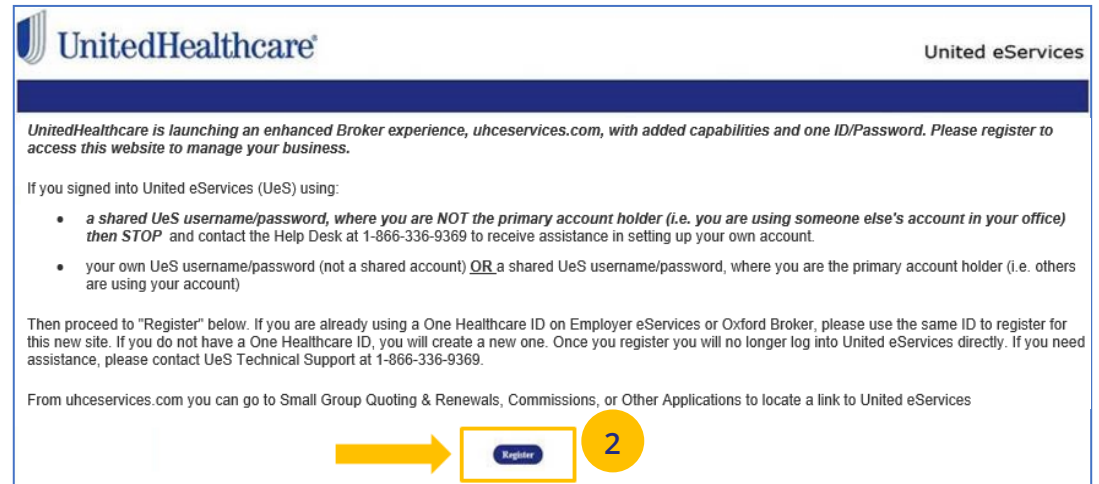
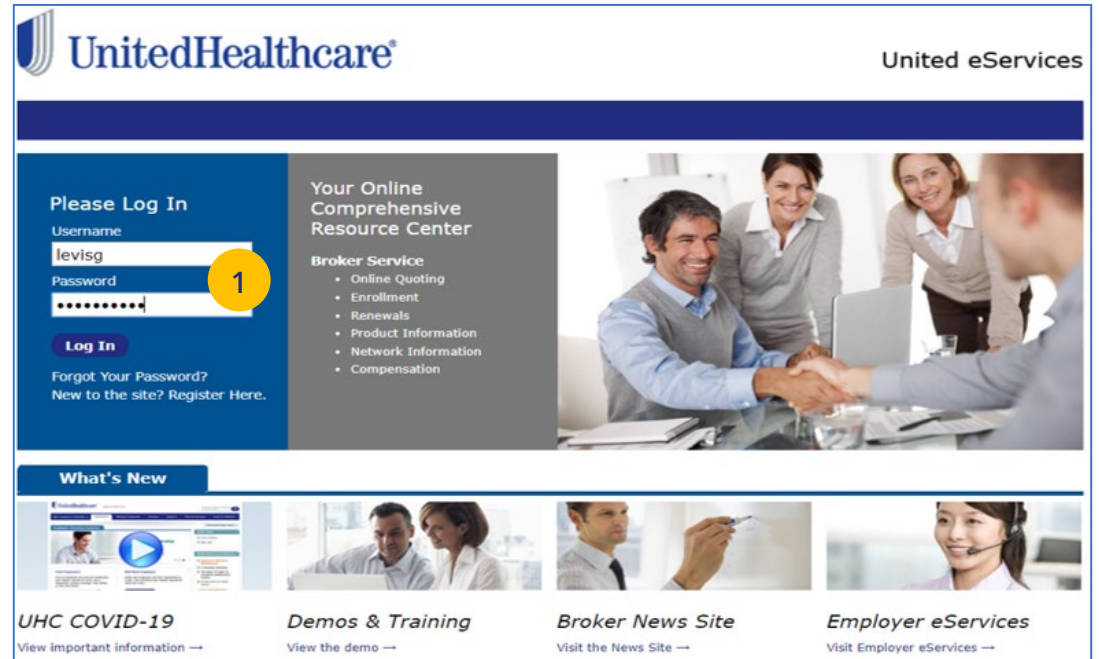
- Brokers will be transitioned from United eServices (UeS) to uhceservices by market in a phased approach. You will receive a message upon logging into United eServices, directing you to register for uhceservices.
- After registering, you will then use uhceservices as your Broker site and access UeS directly from uhceservices.
- You can only access UeS directly from uhceservices.com.

Follow the steps below to register for uhceservices.com from UeS.

1. Log in to UeS. You will be asked to register for uhceservices.com.

Note: The text in this message will differ for **UnitedHealthcare HMO** users.

2. Click **Register**.



3. Enter information to create your **One Healthcare ID** or click the **Sign in now** link to sign in using an existing One Healthcare ID.
4. Check your email box for an email from One Healthcare ID. You can:
 - o Enter the 10-digit activation code to verify your email address and click **Next, or**
 - o You can click the activation link in the email.

Create One Healthcare ID

One Healthcare ID securely manages your account so that you can use one One Healthcare ID and password to sign in to all integrated applications.

i **Already have One Healthcare ID? [Sign in now](#)**

Profile Information

First name

Last name

Year of birth
 ?

Sign In Information

Your email address

Create One Healthcare ID
 ?

Your One Healthcare ID must have:
Ⓞ 6 to 50 characters

Next Step: Verify Your Email Address

1. **Check your email inbox** (chi*****1@optum.com) for a message from One Healthcare ID (noreply@onehealthcareid.com).
2. **Click on the activation link** in the email or [enter the 10-digit activation code](#).

10-digit activation code

4

Still waiting for your activation code? [Resend email](#) or [update email address](#)

If you don't see it, check your junk or spam folders. You may need to resend the message or add our address to your approved senders.

If you'd like assistance, contact support at 1(855)819-5909 or optumsupport@optum.com

Confirm your One Healthcare ID email address

OH One Healthcare ID-NoReply <noreply@onehealthcareid.com>
 To: Chintakayala Bhavani
 Retention Policy: UHGIInbox (90 days) Expires: 6/23/2021 Thu 3/25/20

One Healthcare ID

Your One Healthcare ID

[Activate my One Healthcare ID](#)

4


If you prefer, copy this 10-digit code 1571003356 and paste it into the box for the activation code on the Activate Your One Healthcare ID page.
 If you did not request an activation link or code, or if you have questions about setting up a One Healthcare ID, contact us at 1(855)819-5909 or optumsupport@optum.com.



1 | How to Access and Sign in to UeS via uhceservices (continued)

- 5. Click **Continue**.
- 6. Click **I Agree**.

Email Address Verified

 Your One Healthcare ID is ready to use. Click the Continue button below to finish.

5

Share My One Healthcare ID

Using your One Healthcare ID to sign in to Broker and Employer Portal means that Broker and Employer Portal uses your One Healthcare ID account information to verify your access. We share this information with Broker and Employer Portal :

- One Healthcare ID
- Name
- Email address

By clicking I Agree,

- You give One Healthcare ID permission to share your account information with Broker and Employer Portal;
- You acknowledge that your account information is being provided to Broker and Employer Portal and it is subject to the Broker and Employer Portal privacy policy; and
- You acknowledge that the Broker and Employer Portal privacy policy may be different from the One Healthcare ID privacy policy.

6



- Follow the Attestation process by clicking each link (Terms of Use and Privacy Policy). Then click **Agree**. The **Pending Associations** screen displays.

Note: Pending Associations - Each user, whether you are a broker or a delegate, are associated to one or more agencies or producers. This allows you to easily work on their behalf: quoting new business, managing renewals, etc. You must be associated with all the commission codes used so you can see all your groups.

- Select **Accept** to accept any or all Broker associations.
- Click **Save**. The uhceservices.com Home Page displays.

Note: Help - If you currently share a UeS login and need assistance setting up your account, call the UeS Help Desk at 866-908-5940. You can also call this number to (1) report any missing agency/producer associations, or (2) report any issues associated with the transition.



1 | Access and Log In with OneHealthcare ID

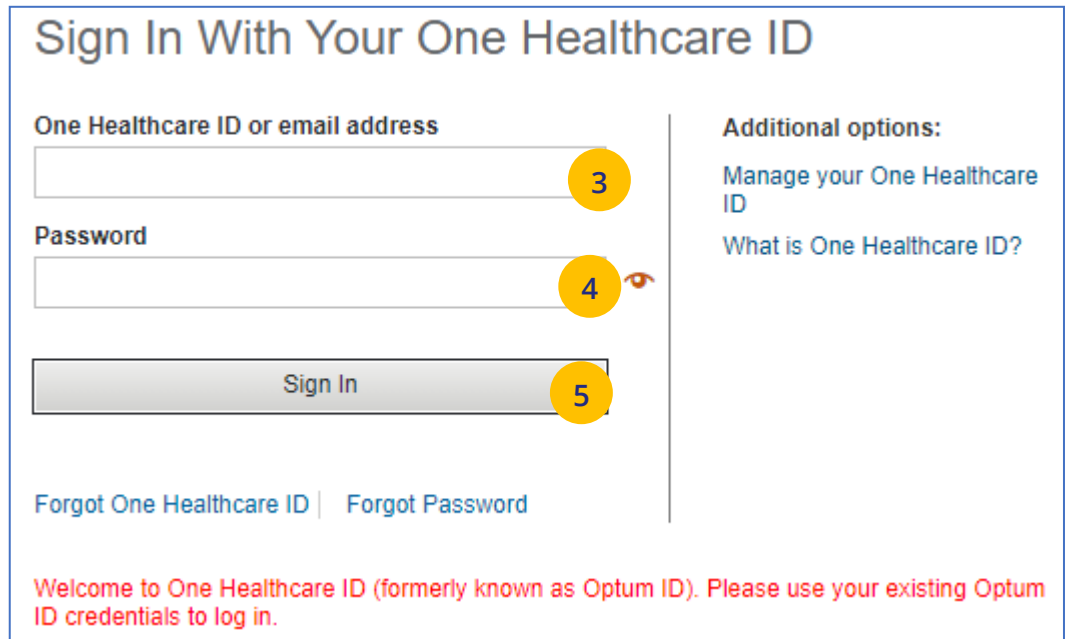
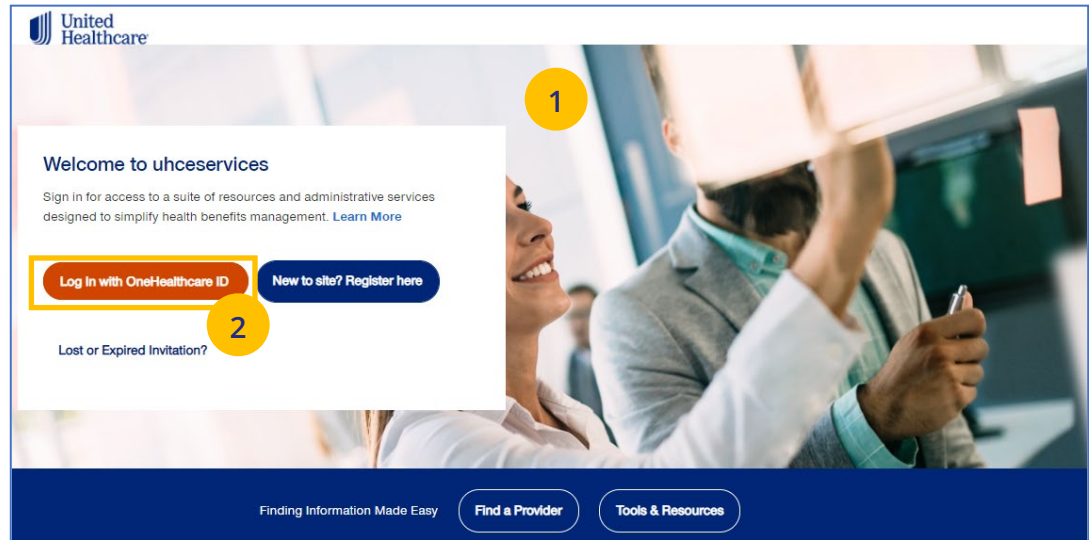
NOTE: Follow the steps below after receiving your official access invite email from uhceserv_invite@uhc.com.

1. Go to uhceservices.com. The Log In page displays.
2. Click the **Log In With OneHealthcare ID** button.
3. Enter your One Healthcare ID in the **One Healthcare ID or email address** field.
4. Enter your Password in the **Password** field.
5. Click **Sign In**. The **Home** page displays.

What information will you see?

uhceservices.com is used by both brokers and employer groups. The content you see is tailored based on your login credentials as either a broker or representative of the employer group. You as a broker, and your delegates, see information that's relevant to you.

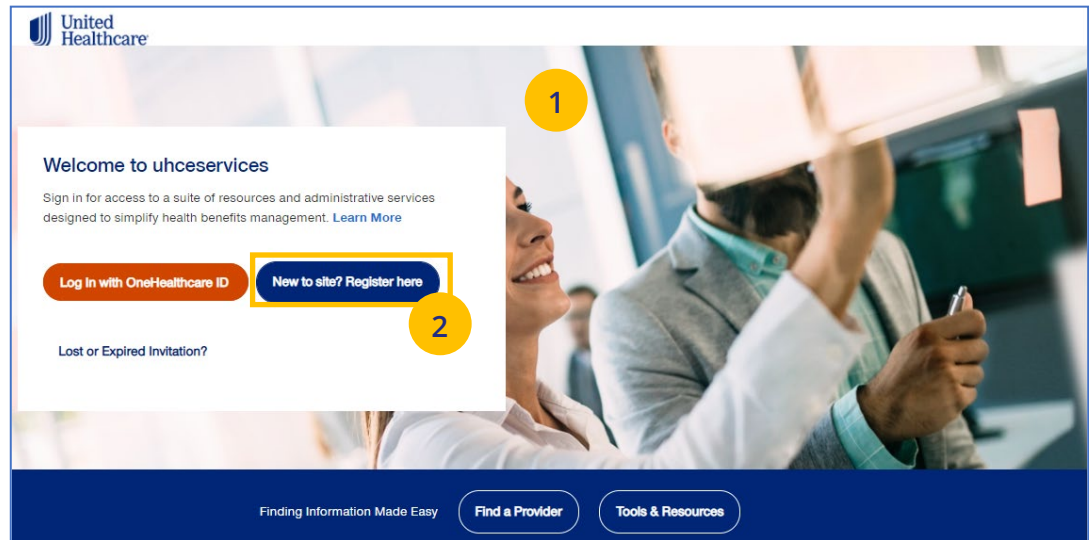
NOTE: If user is inactive for 13 months, the account will be deactivated.



1 | Access: New to Site

NOTE: If you are new to uhceservices and do not have a OneHealthcare ID, follow the steps below.

1. Go to uhceservices.com. The Log In page displays.
2. Click the **New to site? Register here** button. The **Search for United eServices Account** screen displays.



1 | Access: New to Site (continued)

3. Enter your UeS user name in the **Username** field.
4. Enter your UeS password in the **Password** field.
5. Click **Enter**. You will get a message that you have successfully migrated to uhceservices.com. You will receive an email with the link to register.

Note: If you have a User ID that has already migrated from UeS, you can follow the prompts to create your own account.

United Healthcare

Search for United eServices Account

To begin, enter your United eServices username and password. We want to ensure your credentials from United eServices move over properly!

Username

Password

You've been successfully migrated to uhceservices.com! You will no longer be able to access United eServices through United eServices login but can through uhceservices. Check your inbox for the subject line: Your registration for uhceservices.com.

Don't have a United eServices Username and Password? Call us 866-908-5940.

Your registration for uhceservices.com

uhceserv_invite@uhc.com
To Gerber, Kathleen M
Retention Policy UHGINbox (90 days) Expires 3/6/2022

Dear Olivia Gerber,

Welcome. We're pleased to provide you access to the uhceservices.com broker and employer website on behalf of Olivia Gerber.

Uhceservices.com is meant to be your self-service destination for information pertaining to UnitedHealthcare commercial groups.

Please take a moment today to register on uhceservices.com. Doing so will allow you to become familiar with all the website has to offer you for servicing:

GERARDI INSURANCE SERVICES INC
RAY SMITH
MACK JACKSON

Get Started

- Click [Register](#) and follow the prompts for entering your One Healthcare ID and password in the appropriate fields.
- Need to create a One Healthcare ID? Follow the prompts for creating a One Healthcare ID and password.
- Forgot your One Healthcare ID? Follow the prompts to reset your One Healthcare ID and password.

Thank you,
uhceservices.com Administration Team

You are receiving this email from UnitedHealthcare because you receive a service or have a health plan with us. This mailbox is used for outbound messages only, please do not reply. When sending an email to us, do not include personal information.

This email was sent by UnitedHealthcare, 9700 Health Care Lane, Minnetonka, MN 55343 USA.

Health plan coverage provided by or through UnitedHealthcare Insurance Company or its affiliates. Administrative services provided by United HealthCare Services, Inc. or their affiliates.

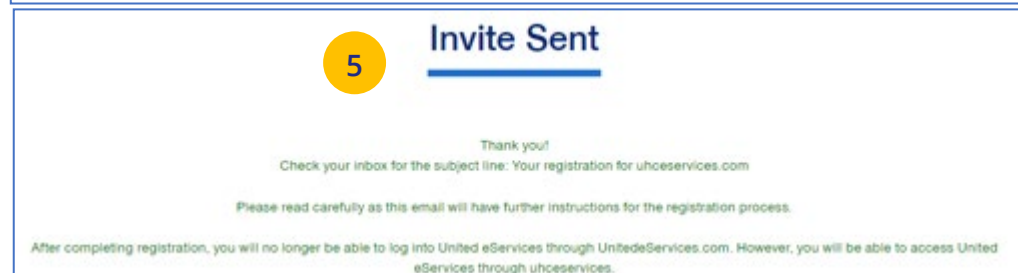
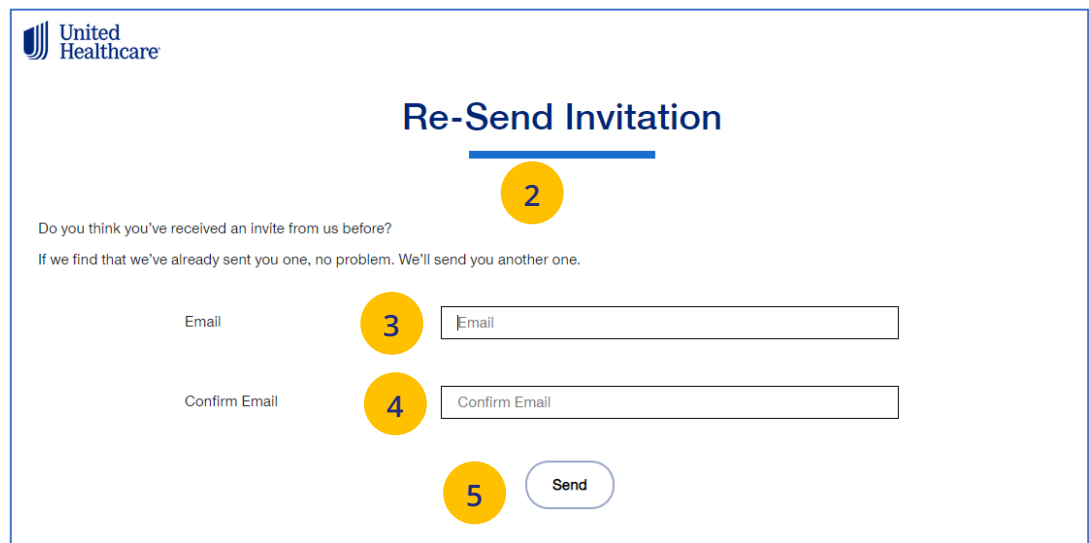
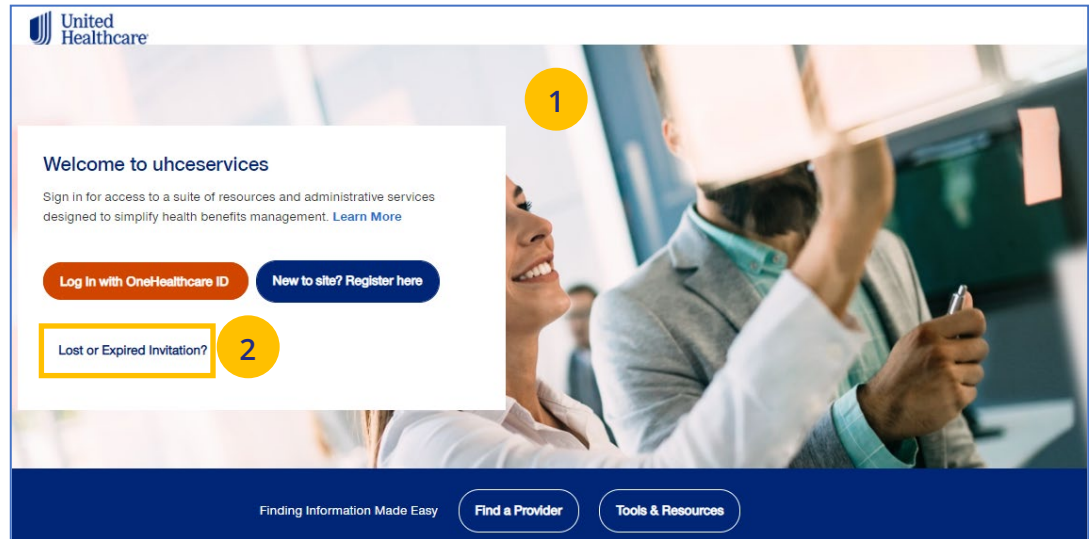


1 | Access: Lost or Expired Invitation

NOTE: If you have lost your email invitation to register or have an expired invitation, follow the steps below.

1. Go to uhceservices.com. The Log In page displays.
2. Click the **Lost or Expired Invitation?** The **Re-Send Invitation** screen displays.
3. Enter your email address in the **Email** field.
4. Enter your email address in the **Confirm Email** field.
5. Click **Send** page. You will get a message that the email invitation has been sent.

Note: If the system is unable to locate a pending invitation, you will receive a message asking you to call (866) 908-5940.






The **Home** page displays the following:

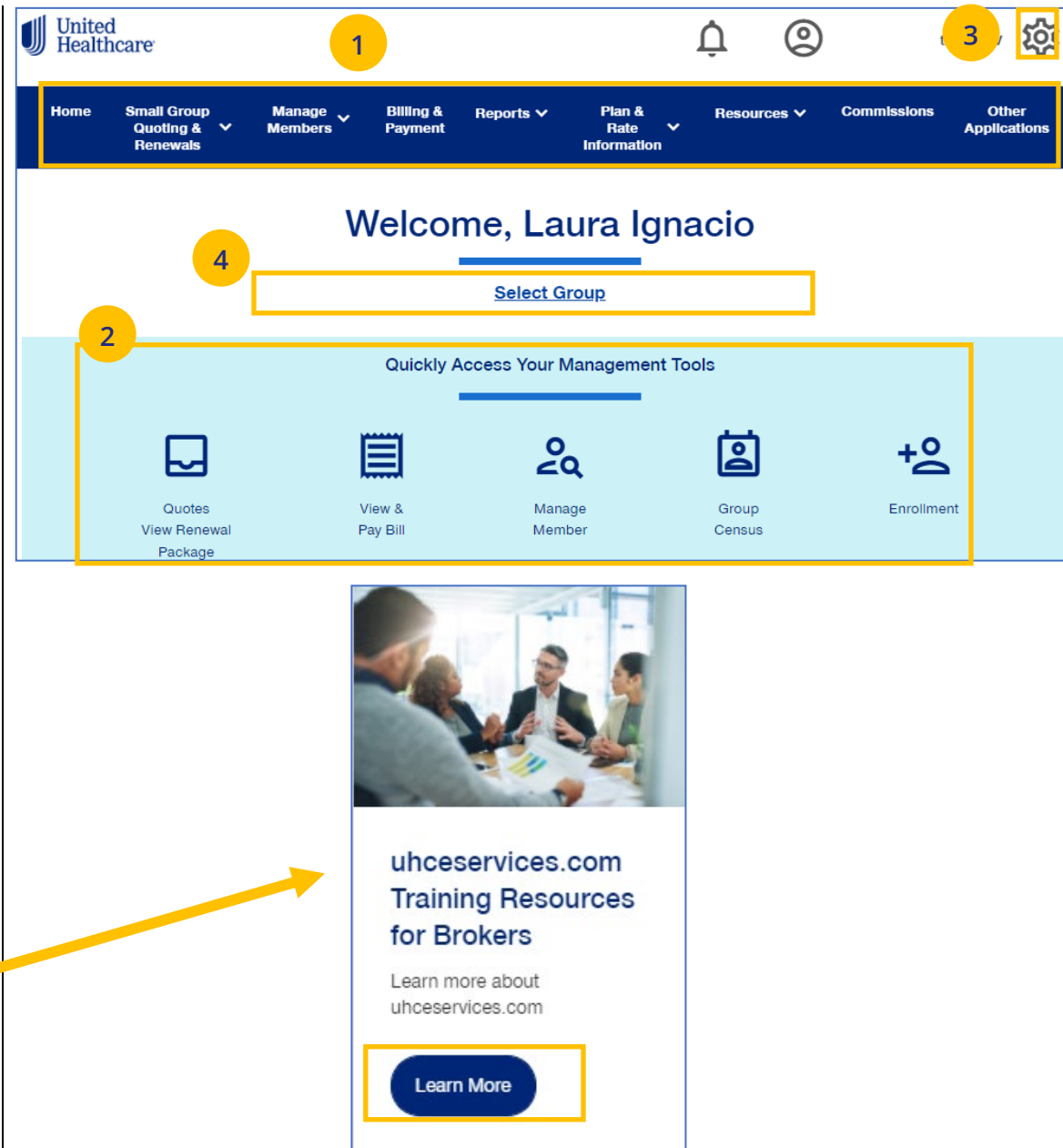
1. **Menu** items across the top of the page
2. **Quick Access links** or “shortcuts” provide easy access to the most common tasks performed
3. **Gear icon** that allows you to do the following:
 - invite others to use uhceservices.com
 - view your personal information
 - change your password
 - view messages or generated reports
 - logout
4. The **Group Selection** option is used initially to select a group. After selection, the group name and group number will be shown.

Note: PEO (Professional Employer Organization) Groups – For PEO Groups, a **Select Child Group** link will display. Click this link to select the Child Group needed.

Note: Group Eligibility Verification Audit – A message displays on the Home page if you have one or more groups required to complete an eligibility verification audit. Click **View Groups** to see the groups under eligibility review. Click [here](#) to view a Job Aid with step-by-step procedures.

Note: You can scroll down on the **Home Page** to access more information. Just click the **Learn More** button to view the specific information.

Note: Print Capability – You have the ability to print information throughout uhceservices.com. Click the Print icon  where displayed to print information.



The screenshot shows the United Healthcare Home page. At the top left is the United Healthcare logo. To its right is a navigation menu with items: Home, Small Group Quoting & Renewals, Manage Members, Billing & Payment, Reports, Plan & Rate Information, Resources, Commissions, and Other Applications. A yellow circle with the number '1' is placed above the navigation menu. In the top right corner, there are icons for a notification bell, a user profile, and a gear (settings) icon. A yellow circle with the number '3' is placed above the gear icon. Below the navigation menu, the page says 'Welcome, Laura Ignacio'. A yellow circle with the number '4' is placed above a 'Select Group' button. Below this is a section titled 'Quickly Access Your Management Tools' with five icons: Quotes (View Renewal Package), View & Pay Bill, Manage Member, Group Census, and Enrollment. A yellow circle with the number '2' is placed above this section. At the bottom right, there is a promotional banner for 'uhceservices.com Training Resources for Brokers' with a 'Learn More' button. A yellow arrow points from the 'Learn More' button in the banner to the 'Learn More' button in the banner.

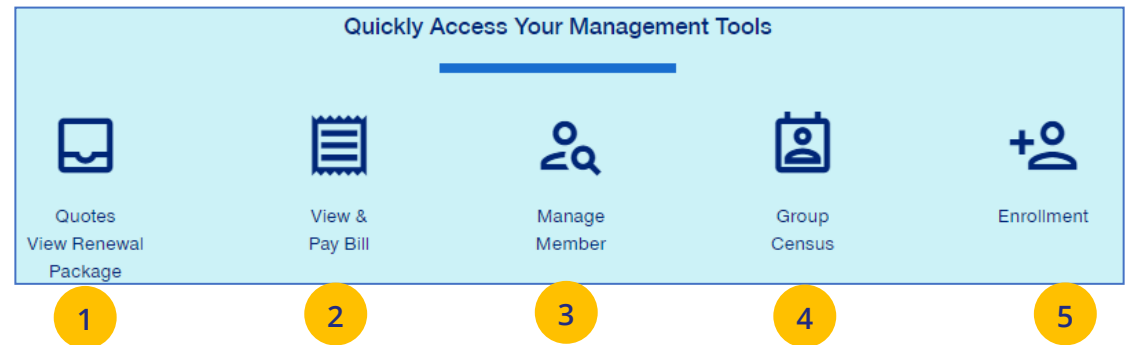


3 | Quickly Access Your Management Tools

The **Home** page contains quick access icons that offer shortcuts to the most common tasks performed on uhceservices.com.

These shortcuts most often include:

1. **Quotes View Renewal Package** – Access United eServices (UeS) to view quotes and renewal packages
2. **View & Pay Bill** – Displays Billing & Payment screen.
3. **Manage Member** – Allows you to search for a member within the specific group.
4. **Group Census** – Displays Member & Subscriber Lists.
5. **Enrollment** – Goes to the Enrollment screen where you can enroll a new member or a dependent.



4 | Gear Icon

The **gear icon**, located in the upper-right corner of the screen, is used to do the following:

1. **Invite User** – Invite someone to use uhceservices.com.
2. **Manage User** – Search for a user to view their details and permissions.
3. **My Settings** – Change password, edit your personal information, and view your “permissions” or what information you have access to.
4. **Manage Broker** – Search for a broker to view and manage information.
5. **Manage Employer** – Search for an employer to view and manage information.
6. **Message Center** – Contains Important messages and is used to retrieve reports that have been generated.
7. **Logout** – Logout of the application.

The screenshot displays the United Healthcare user interface. At the top left is the United Healthcare logo. The top right corner features a notification bell, a user profile icon, and a gear icon (highlighted with a yellow arrow). Below the navigation bar, the user is greeted with "Welcome, Laura Ignacio" and a "Select Group" link. A section titled "Quickly Access Your Management Tools" contains five icons: "Quotes View Renewal Package", "View & Pay Bill", "Manage Member", "Group Census", and "Enrollment". A dropdown menu is shown below, listing options: "Laura Igna... Stage ENV" (with a gear icon and a hand cursor), "Invite User", "Manage User", "My Settings", "Manage Broker", "Manage Employer", "Message Center", and "Logout".



4 | Invite User

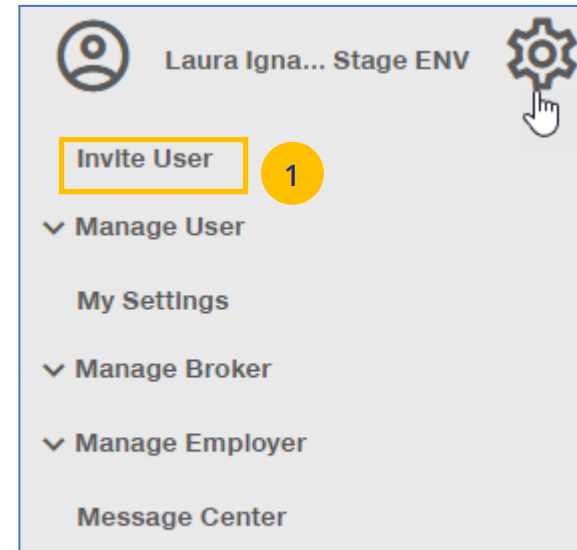
Broker users with user maintenance permissions can give support staff access to uhceservices so they can perform functions on the broker's behalf. To invite a someone to use uhceservices.com:

1. Click the **Gear icon** and select **Invite User**. The **Invite a Broker User** screen displays.
2. Enter **First Name, Last Name, Email** address.
3. Select the **Role** from the **Choose a Role** dropdown.

Note: UnitedHealthcare Sales & Account Management can also invite Broker users. For an individual Broker, there can be only one Broker Admin. An Agency can have multiple Admins.

Broker and Employer Roles

Click [here](#) to go an **Appendix** at the end of this document that shows (1) **Broker roles** and permission descriptions, and (2) **Employer roles** and permission descriptions.



Invite a Broker User

Agency/Broker Name:

User Information

By adding any individual as a portal user, the Group is granting the individual access to protected group information. Each user will create a User ID and password and in doing so, certifies that they have the authority to access confidential and personal information protected by Law. Company agrees to indemnify UnitedHealthcare Insurance Company and its affiliated companies from any and all liability and loss, expenses (including reasonable attorney's fees), and claims for damages or injury arising from any Incident or Breach (as defined by HIPAA) that is associated with the identified users. This indemnification includes any claim relating to the validity or eligibility information provided.

First Name *

Last Name *

Email *

Role *

Broker User Type

User Type identifies the Principals/Owners associated to this Broker/Agency. By selecting the Broker User Type of Administrator, you are assigning this user as the Principal/Owner.

Administrator Delegate



4 | Invite User (continued)

4. Indicate whether the invitee is an **Administrator** or a **Delegate** within United eServices. Only the agency/principal owner should be an Administrator. All other agency employees should be a delegate.
5. Click **Create**. A message indicates that your invitation has been successful.

Invite a Broker User

Agency/Broker Name:

User Information

By adding any individual as a portal user, the Group is granting the individual access to protected group information. Each user will create a User ID and password and in doing so, certifies that they have the authority to access confidential and personal information protected by Law. Company agrees to indemnify UnitedHealthcare Insurance Company and its affiliated companies from any and all liability and loss, expenses (including reasonable attorney's fees), and claims for damages or injury arising from any Incident or Breach (as defined by HIPAA) that is associated with the identified users. This indemnification includes any claim relating to the validity or eligibility information provided.

First Name *

Last Name *

Email *

Role * **Compare Roles**

Broker User Type

User Type identifies the Principals/Owners associated to this Broker/Agency. By selecting the Broker User Type of Administrator, you are assigning this user as the Principal/Owner.

Administrator Delegate

4 **5**

Cancel **Create**

5


Invite a Broker User

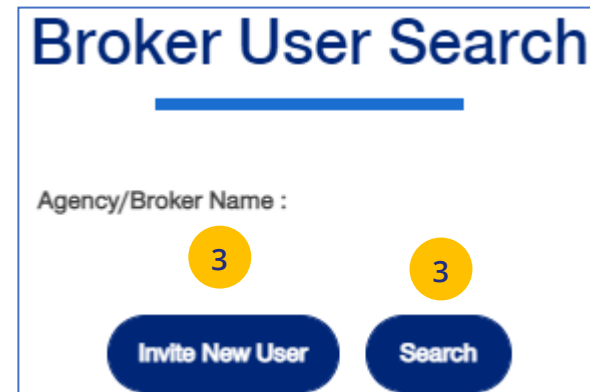
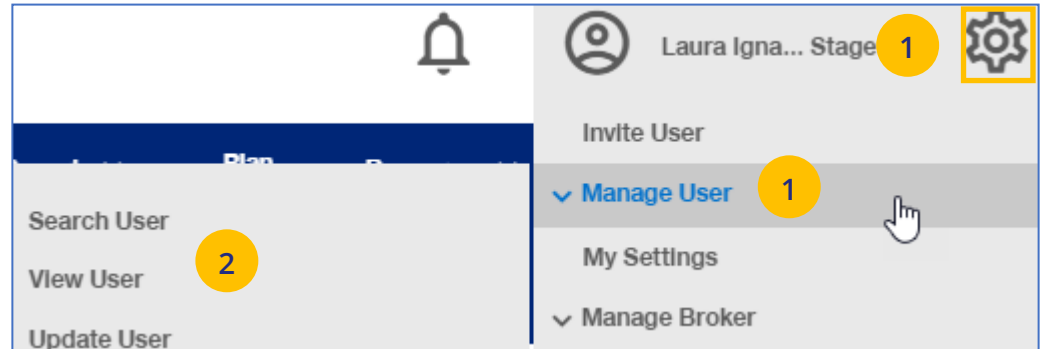
User Louis Johnson successfully invited as Agency/Broker User



4 | Manage User


To search for and select a specific user to view or update user information, follow the steps below:

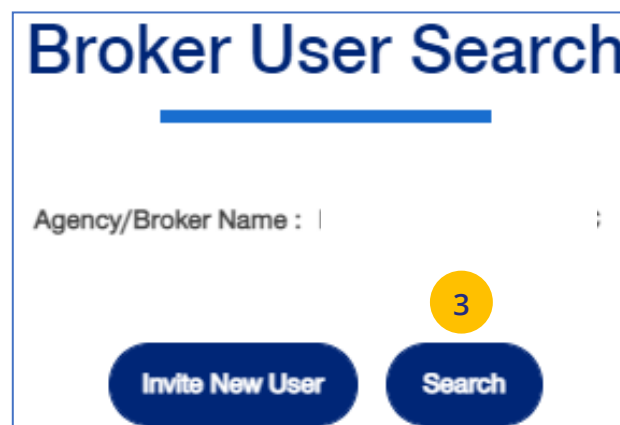
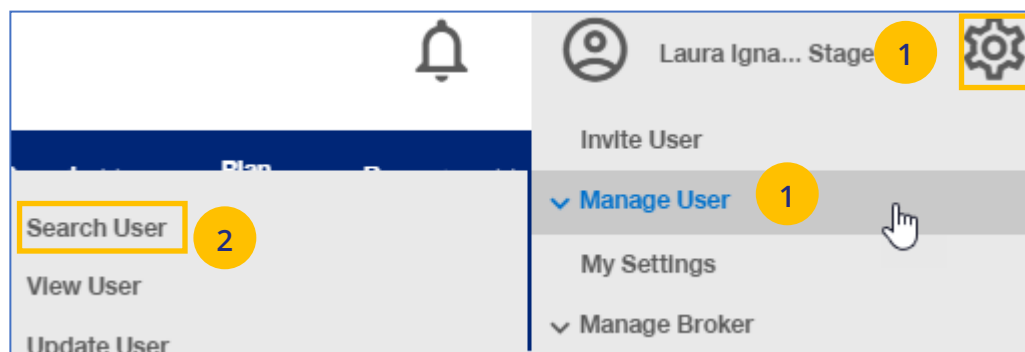
1. Click the **gear icon**  and select **Manage User**. You will have three options:
 - **Search User** – You can search for a user or invite a new user (if you have that capability)
 - **View User** – You can search for a user or invite a new user (if you have that capability)
 - **Update User** – You can search for a user or invite a new user (if you have that capability)
2. Select one of the options to display the **Broker User Search** screen.
3. You have two options:
 - Click **Search**. The search results will display with the list of users.
 - Click **Invite New User**. The **Invite a Broker User** screen displays. Complete the information and click **Create**.



4 | Re-Invite a User

To re-invite a specific user to view or update user information, follow the steps below:

1. Click the **gear icon**  and select **Manage User**.
2. Select **Search User**.
3. Click the **Search** button.



4 | Re-Invite a User (continued)

To re-invite a specific user to view or update user information, follow the steps below:

- In the **Filter by** area, click the plus sign to expand the filter fields. Search for the user you need using the filter fields
- Click on **Re-Invite**. A message displays indicating the “re-invite” was successful. The user will receive a new invitation email.

Filter by
4
✕

Select Deactivation Date Range

Select the date range
📅

Optum ID

First Name

Last Name

User Email

Select Status ▼

Select Role ▼

Clear Filter

Piatt, Anglette (Enabled)					Select User
One Healthcare ID	User Email	Role	Last Login	Deactivation	
apiatt3	anglette_d_piatt...	Standard Broker with Commissions	04/07/2020	05/07/2021	
Piatt, Anglette (Invited)					Select User
apiatt3	anglette_d_piatt...	Standard Broker with Commissions	N/A	N/A	Re-Invite
Stage ENV ..., Laura Igna... (Enabled)					Select User
lignacio3	laura_l_ignacio@...	Broker Lead with User Maintenance	06/01/2021	N/A	
Dylan, Louis (Invited)					Select User
ldylan@compny.or...	ldylan@compny.or...	Standard Broker with Commissions	N/A	N/A	Re-Invite

5

User Louis Dylan successfully re-invited as Standard Broker with Commissions.



4 | My Settings

The **My Settings** page can be used to do the following:


- **Change Password**
- **Manage My Profile** – Manage your One Healthcare ID.
- **Personal Information** – View details or edit personal information.
- **My Associations** – Broker associations and specific permissions.
- **Platforms/Tools** – Specific role or roles for the associated Platform/Tools
- **Account Overdue Balance Alert Preferences** – Account Overdue Balance alert can be sent through email or Message Center.
- **Contact Information** – Broker Contact information is shown with ability to edit (update).
- **Addresses** – Shows mailing addresses and telephone numbers.

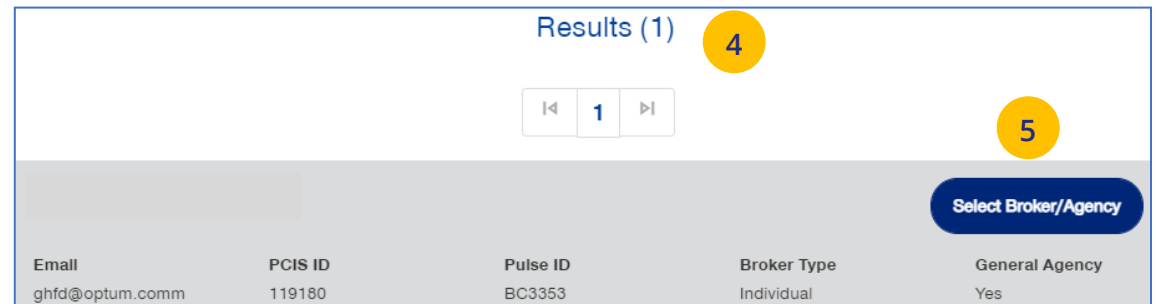
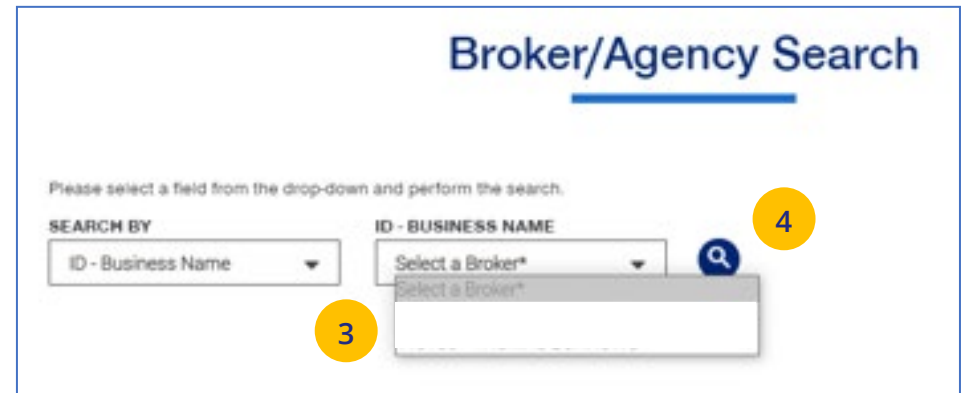
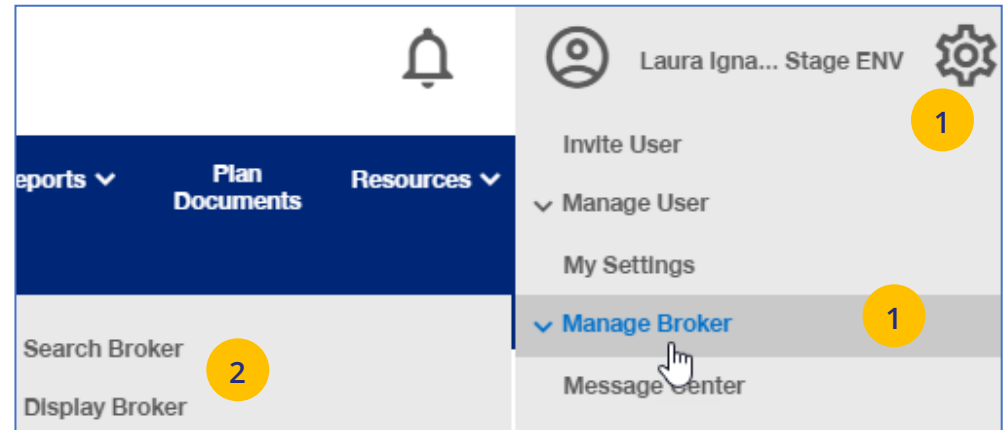
The screenshot displays the user interface for the 'My Settings' page. At the top, the user's name 'Laura Igna... Stage ENV' is shown next to a profile icon and a settings gear. Below this, there are options for 'Invite User' and 'Manage User'. The 'My Settings' option is highlighted with a yellow box, and a hand cursor is pointing at it. The main content area is titled 'My Settings' and contains two buttons: 'Change Password' and 'Manage My Profile'. A message states 'Your changes will be reflected after re-login.' Below this are sections for 'Personal Information' (with an 'Edit' button), 'My Associations', and 'Permissions'. The 'My Associations' section shows 'Broker Role: Admin'. The 'Permissions' section lists 'Billing & Payment' and 'Commissions', both with plus signs to expand.



4 | Manage Broker

To search for a Broker, follow the steps below:

1. Click the **gear icon**  and select **Manage Broker**.
2. Select either **Search Broker** or **Display Broker**. The Broker/Agency Search screen displays.
3. Select the broker from the dropdown.
4. Click the **Search** icon. The search results will be shown. Scroll down to see all the results.
5. Click **Select Broker/Agency** for the broker information you need. The **View Broker/Agency** screen displays with information on the broker.



4 | Manage Broker (continued)

- **Broker/Agency Information** – Shows details on the broker.
- **Contact Information** – Broker Contact information.
- **Appointment Information** – Shows list of appointments.
- **Associated Groups** – Shows groups associated with the broker.
- **Associated Users** – Shows users associated with the broker.

Note: How are brokers/agencies tied to the group in uhceservices? It's important to understand how brokers/agencies are tied to the group in uhceservices.

- At New Business, a group is attached to the broker/agency (PCIS code). Each agency determines how they want their commissions paid (one or multiple PCIS codes). **Note: Anyone associated to the PCIS will see ALL groups under that PCIS code.**
- Each associated user, with a broker/agency, must be associated to all PCIS codes for which they support in order to see all the groups for that broker/agency.
- If you have a user that can't see all the groups, they need to be tied to additional PCIS codes. You can do this through the **Invite User** function.

View Broker/Agency	
Broker/Agency Information ✕	
First Name	
Last Name	
Email	ghfd@optum.comm
PCIS ID	119180
Pulse ID	BC3353
General Agent Indicator	Yes
Broker Type	Individual
Contact Information +	
Appointment Information +	
Associated Groups +	
Associated Users +	



4 | Manage My Profile

To manage your One Healthcare IDs or to move Associations, follow the steps below:

Note: Click [here](#) for FAQs related to this topic.

1. Click the **Manage My Profile** button.
2. You have the option to move associations from another ID to your logged-in ID, or to another ID from your this logged-in ID. Select the button that indicates what you want to do and click **Next**.

The image displays two screenshots of a web application interface. The top screenshot, titled "My Settings", shows a navigation bar with "Change Password" and "Manage My Profile" buttons. The "Manage My Profile" button is highlighted with a yellow box and a yellow circle containing the number "1". Below this is a "Personal Information" section with fields for First Name (Hina), Last Name (Hinaemp), Email (chintakayala_bhavan1@optum.com), and Optum ID (Hinaemp). An "Edit" button is located to the right. The bottom screenshot, titled "Manage My Profile", shows a progress bar with three steps: "1 Direction", "2 Selection", and "3 Review & Submit". The "2 Selection" step is highlighted. Below the progress bar, a question asks "What would you like to do with your One Healthcare ID - Hinaemp". Two radio button options are listed: "Move my associations from another One Healthcare ID into this One Healthcare ID" and "Move my associations to another One Healthcare ID". The first option is selected and highlighted with a yellow box and a yellow circle containing the number "2". Below the options are "Cancel" and "Next" buttons, with the "Next" button highlighted by a yellow box and a yellow circle containing the number "2". A "FAQs" link is visible on the right side of the page.



4 | Manage My Profile (continued)

3. **Move Associations:** Choose one or more existing IDs that match their name and email, **or** manually enter the ID/password for another ID.
4. **Move Associations:** This page shows the list of associations under the ID chosen on the previous page. User will submit and get the success message.
5. Click **Next**.



4 | Manage My Profile (continued)

6. Click **Submit**. A success message displays.
7. Click the **Log off** button and log back in.

✓ Direction ✓ Selection 3 Review & Submit

Please confirm you wish to move the following associations to your One Healthcare ID - Hinaemp [FAQs](#)

Hinaemp2

Louis Agency - 99999

6

Cancel Previous **Submit**

Manage My Profile

✓ Direction ✓ Selection ✓ Review & Submit

6 Your move was successful. Please log off and log back in.

7 **Log off**



4 | Roles and Permissions (My Associations)

You can use **My Settings** to view your specific roles and permissions and to view what information you have access to in uhceservices.

1. Under **My Settings**, scroll down to the **My Associations** section. You will see your specific **Broker Role** (Admin or Delegate) and your **User Role**.
2. Scroll down to **Permissions** to view all the tasks you can perform in uhceservices.
 - o Click the plus sign **+** to expand the category to view specific permissions within that category.

Note: Requesting Change to User Role (Permissions): If you need to perform a task or tasks that you do not have permission to perform, work with your Agency Administrator or call 1-866-908-5940.

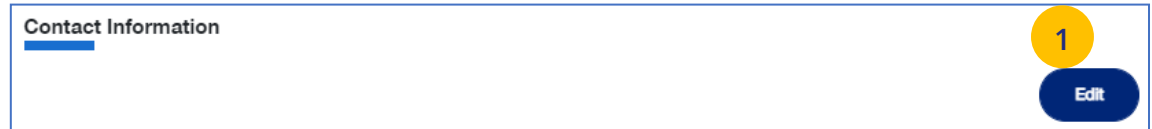
The screenshot displays two sections of the user interface. The top section, titled 'My Associations' (marked with a yellow circle '1'), shows the 'Louis Agency - 99999' with a close button. Below this, a table lists roles: 'Broker Role: Admin' and 'User Role: Broker Lead with User Maintenance'. The bottom section, titled 'Permissions:' (marked with a yellow circle '2'), lists several categories with expand/collapse buttons: 'Billing & Payment' (plus sign), 'Commissions' (plus sign), 'Member Management' (minus sign), 'Quoting & Renewals' (minus sign), and 'Reports' (minus sign). Each category has a list of specific permissions below it, such as 'Add Member', 'Request ID card', 'Term Member', 'Update Member', 'View Eligibility', 'View Member', 'Quoting', 'Renewal', 'Renewal Package', 'Banking Reports', 'Delinquent Employer Accounts', and 'Level Funded Reporting'.



4 | View and Update Broker Contact Information

To update broker contact information, follow the steps below:

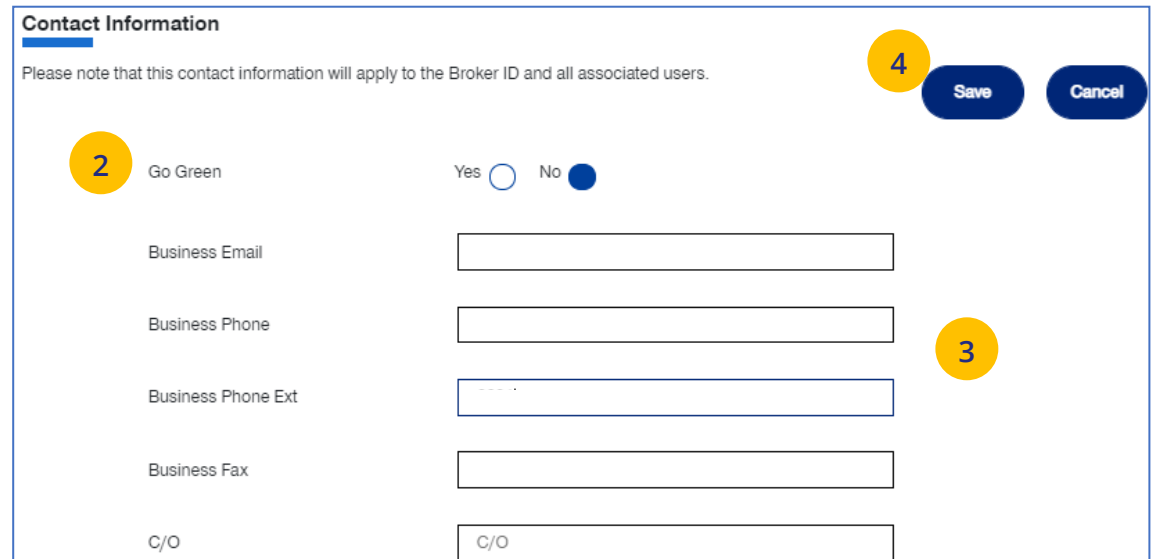
1. Click the **Edit** button in the **Contact Information** section to display the Contact Information screens.
2. In the **Go Green** field:
 - Click **Yes** if you want the renewals you are updating for the broker accessible in online form only (paper renewals will no longer be sent).
Note: Only a **Broker Admin** can update the **Go Green** indicator.
 - Click **No** if you want the information in paper form.
3. Enter information in any of the fields with the boxes.
4. Click **Save**. The following message will be shown: **“Updates have been submitted successfully. Your changes may not be reflected immediately.”**



Contact Information

1

Edit



Contact Information

Please note that this contact information will apply to the Broker ID and all associated users.

4

2

Go Green Yes No

Business Email

Business Phone

Business Phone Ext

Business Fax

C/O


3

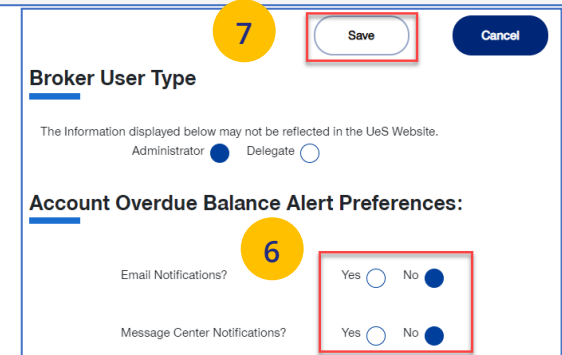
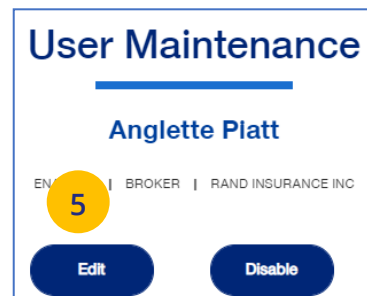
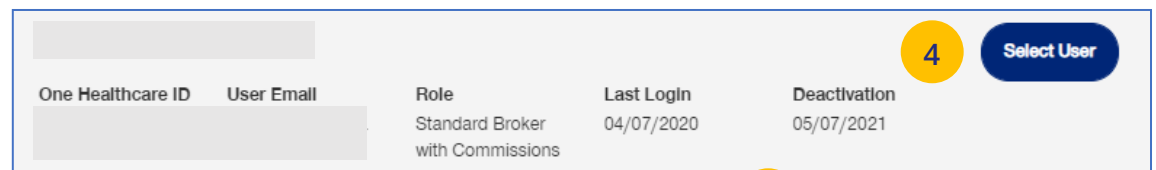
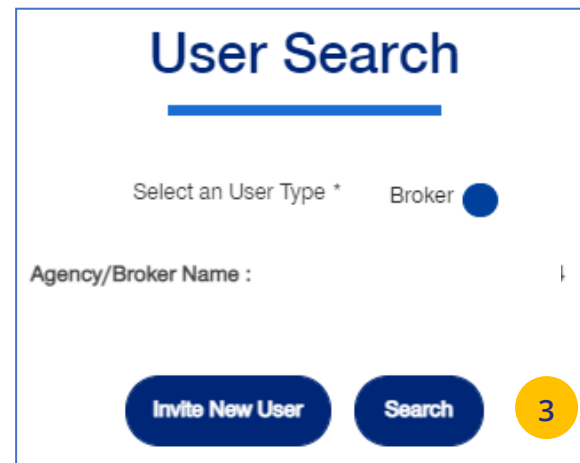
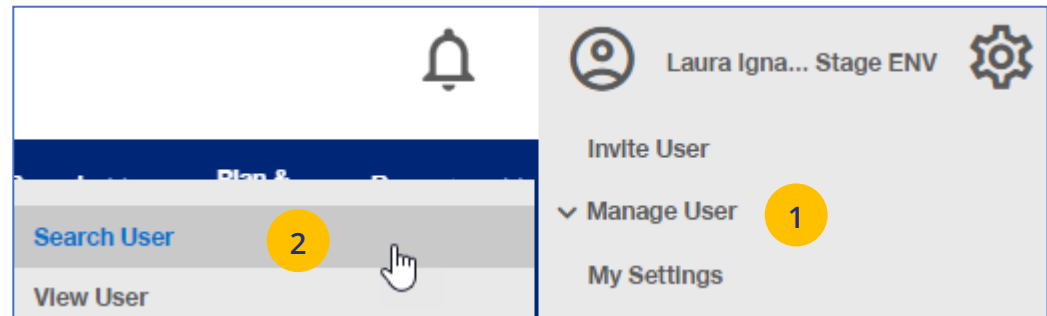
Save Cancel



4 | Update a User's Account Overdue Balance Alert Preferences


You can update a broker user's account overdue balance alert preferences through Manage Broker. To do this, follow the steps below:

1. Click the **gear icon**  and select **Manage User**.
2. Select **Search User**. The **User Search** screen displays.
3. Click **Search**.
4. Find the user you need and click **Select User**.
5. Click **Edit**.
6. Scroll down to **Account Overdue Balance Alert Preferences**. You can then choose how the user is to receive alerts. Choose **Yes** or **No** for **Email Notifications** and **Yes** or **No** for **Message Center Notifications**.
7. Click **Save**.

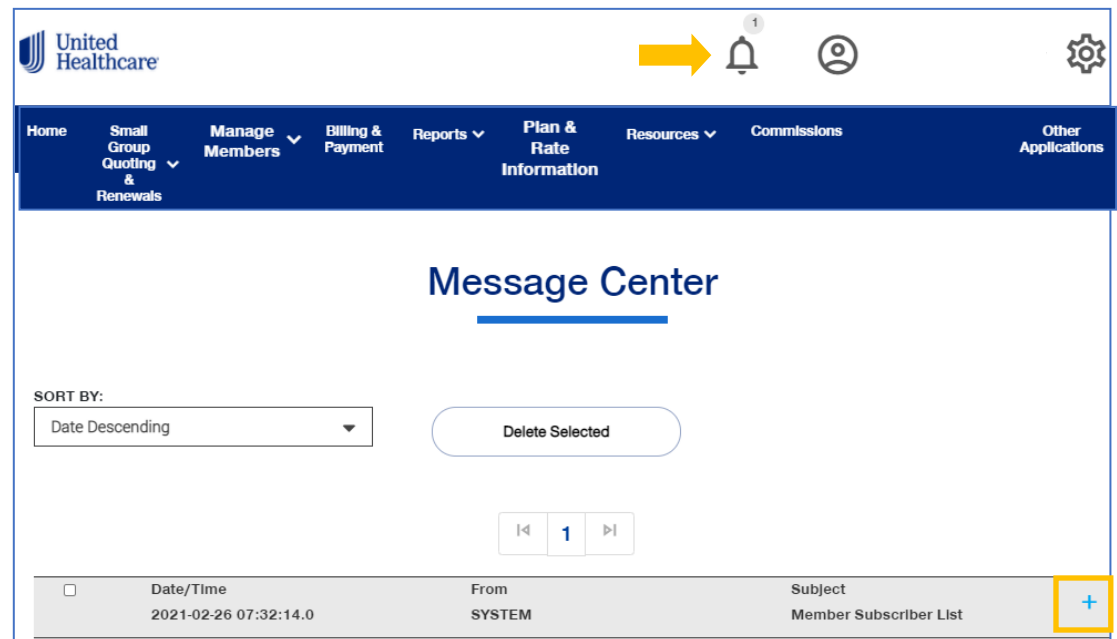
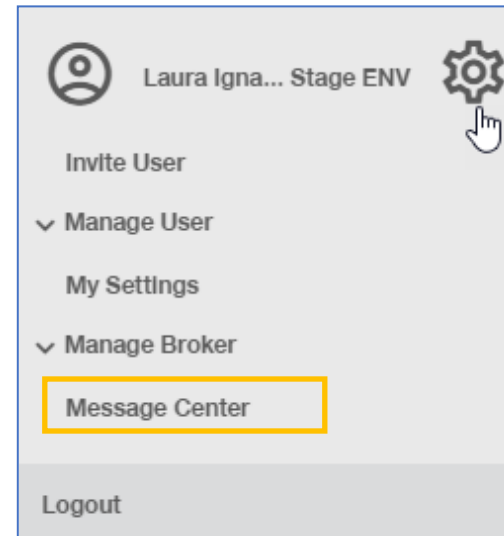


4 | Message Center

The **Message Center** displays messages and links to reports that have been generated.


The bell icon  at the top of the screen indicates the number of new messages or reports you have in the Message Center.

Note: To open a message in the Message Center, click the Plus sign and click the link to the report or message.



5 | Group Selection

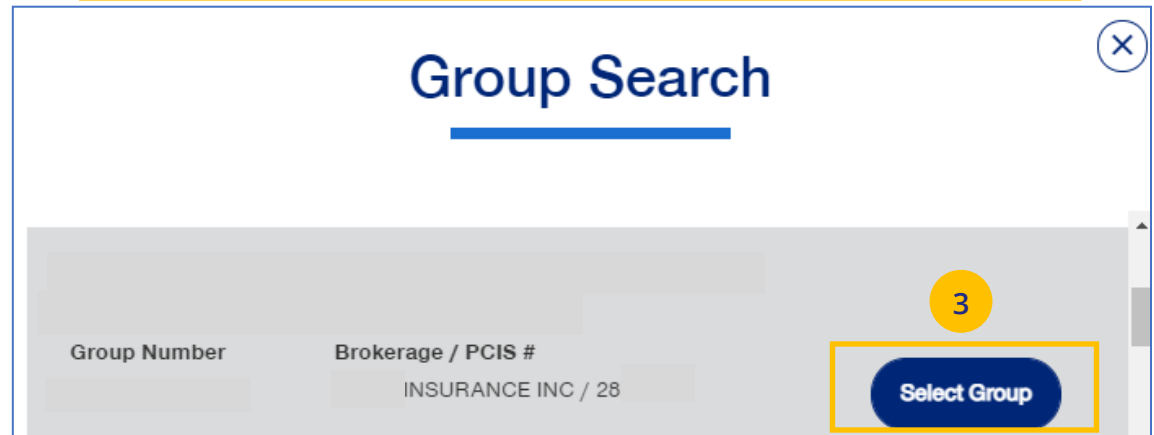
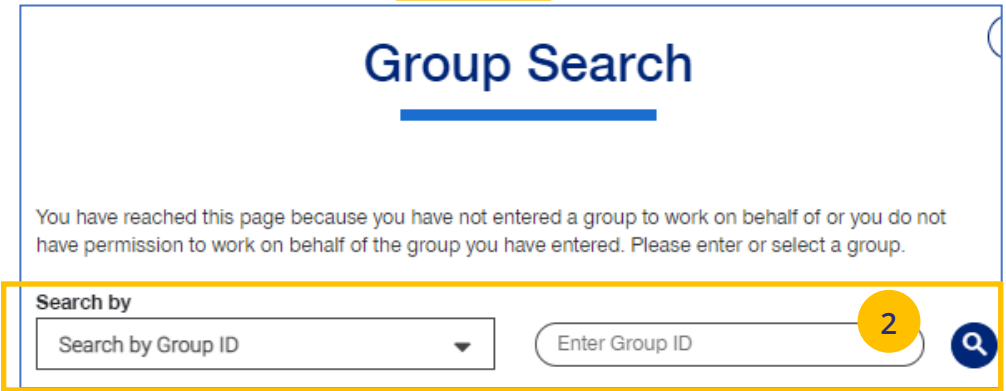
To select a group from the Home page:

1. Click the **Select Group** link. The **Group Search** screen displays.
2. Enter the **Group ID** number and click the **Search** icon . The **Search Results** display.
3. Click **Select Group**. The group will show as your default group on the Home page.
Note: You can click the **Last Viewed** box to view the five most recent groups that you have displayed. The current group you searched for will be at the top. You can view information on the group by clicking the **View Group Information** link.

NOTE: Change Group – Once a group number is selected, it will remain on the Home page until you change it. To change to a different group, click the Change Group link. Repeat steps 2 and 3 above to select your new group. (UnitedHealthcare employees have access to all groups).

NOTE: PEO (Professional Employer Organization) Groups – For PEO Groups, a **Select Child Group** link will display. Click this link to select the Child Group needed. **See step-by-step procedures on the following page.**

NOTE: MyAllSavers and Employer eServices (EeS) – If the group you are searching for is managed on another website, you will be redirected. Click on the button to do go that application.



5 | Group Selection: PEO Groups

For PEO (Professional Employer Organization) groups, a **Select Child Group** link will display after you have selected the **Parent Group**. Follow the steps below to display **Child Group** information.

Note: PEO Groups do not apply to **UnitedHealthcare HMO**.

1. When you select a **PEO Group**, the **Select Child Group** link displays under the **Parent Group** name and number. Click **Select Child Group**. The **Child Group Names** and **Group Numbers** will be shown.

Note: A Parent Group can have one or more Child Groups.

2. Find the **Child Group** you need and click **Select Group**. The Parent Group and **Child Group** information will both show as your default Groups on the home page.

Note: You can click **Change Child Group** and select another child group if more than one are available. To display another group, you must click **Change Group** instead of **Change Child Group**.

PEO_ADP_PARENT4 | GROUP NUMBER : [Change Group](#)

[Select Child Group](#) 1

_CHILD2 1

Group Number

2 [Select Group](#)

_CHILD1

Group Number

[Select Group](#)

_PARENT4 | GROUP NUMBER : [Change Group](#)

_CHILD2 | GROUP NUMBER : [Change Child Group](#) 2



6 | Small Group Quoting & Renewals

The **Small Group Quoting & Renewals** tab will direct you to the correct quoting/enrolling and renewal tool, depending on funding, market, etc. Other common tools are provided under Quick Links.

1. **Help Me Decide** allows you to answer questions that will help you select the right tool for your Quote or Renewal.
2. **Quick Links** provides access to the following:
 - Small Group Renewal Packages
 - Upload Documents
 - United eServices (UeS)
 - MyAllSavers
 - SAM
 - UHC Benefit Services (COBRA)
3. **Small Group Quoting and Renewal** provides links to quoting and enrolling and renewals (for Fully Insured and Level Funded) in the following applications:
 - SAMx
 - SAM
 - MyAllSavers

The screenshot shows the navigation menu for 'Small Group Quoting & Renewals'. The menu items are: Small Group Quoting & Renewals, Manage Members, Billing & Payment, Reports, Plan & Rate Information, Resources, Commissions, and Other Applications. Below the menu are three callout boxes:

- Callout 1:** 'Help Me Decide' section with a 'Get Started' button.
- Callout 2:** 'Quick Links' section containing: Small Group Renewal Packages, Upload Documents, United eServices (UeS), MyAllSavers, SAM, and UHC Benefit Services (COBRA).
- Callout 3:** 'Fully Insured' and 'Level Funded' sections. The 'Fully Insured' section lists: UnitedHealthcare New Business Quoting, SAMx (all states except CA, GA, TX for all effective dates...), SAM (CA for all effective dates...), and Out of Scope (DC, VT). The 'Level Funded' section lists: New Business Quoting, SAMx - Level Funded (all except for VI and Out of Scope Markets) and GA as of 7/1/2022 effective dates, MyAllSavers (VI), Out of Scope (HI, NV - under 50, NY - under 100, VT), and Renewals (SAMx - Level Funded (UHC Level Funded & Oxford Level Funded) and MyAllSavers (All Savers - Policy starts with "5400").




6 | Help Me Decide

The **Help Me Decide** link allows you to answer questions that will help you select the right tool for your Quote or Renewal.

To do this, follow the steps below.

1. Click the **Small Group Quoting & Renewals** tab. The **Small Group Quoting & Renewal** screen displays.
2. Under **Help Me Decide**, click **Get Started**. The **Help Me Decide** screen displays.

The screenshot shows a navigation menu with the following tabs: Small Group Quoting & Renewals, Manage Members, Billing & Payment, Reports, Plan & Rate Information, Resources, Commissions, and Other Applications. The 'Small Group Quoting & Renewals' tab is selected and contains a 'Help Me Decide' section with a 'Get Started' button. A yellow circle with the number '1' is placed over the 'Small Group Quoting & Renewals' tab, and another yellow circle with the number '2' is placed over the 'Get Started' button. The 'Help Me Decide' section includes a photo of two people and the text: 'Use Help Me Decide to find right tool for your Quoting and Renewal needs.' The rest of the menu contains various links categorized under 'Quick Links', 'Fully Insured', and 'Level Funded'.

Small Group Quoting & Renewals	Manage Members	Billing & Payment	Reports	Plan & Rate Information	Resources	Commissions	Other Applications
Help Me Decide  Use Help Me Decide to find right tool for your Quoting and Renewal needs. Get Started				Quick Links Small Group Renewal Packages Upload Documents United eServices (UeS) MyAllSavers SAM UHC Benefit Services (COBRA)	Fully Insured UnitedHealthcare New Business Quoting SAMx (all states except CA, GA, TX for all effective dates. DE, FL, ND, PR, VA, VI WV will begin with a 4/1 effective date) SAM (CA for all effective dates. DE, FL, MD, PR, VA, VI, WV for 2/1 and 3/1 effective dates) Out of Scope (DC, VT) Oxford New Business Quoting and Renewals SAMx (CT, NY & NJ) UnitedHealthcare Freedom Renewals (effective 4/1/22) and New Business Quoting SAMx (NH) UnitedHealthcare Renewal Processing & Packages (effective 9/1/22) SAMx (all states 4/1/23 effective excepts CA, GA, TX) UnitedHealthcare Renewal Processing - All other states not listed above SAM (CA, GA, TX only starting with 4/1/23 effective)		Level Funded New Business Quoting SAMx - Level Funded (all except for VI and Out of Scope Markets) and GA as of 7/1/2022 effective dates MyAllSavers (VI) Out of Scope (HI, NV - under 50, NY - under 100, VT) Renewals SAMx - Level Funded (UHC Level Funded & Oxford Level Funded) MyAllSavers (All Savers - Policy starts with "5400")



6 | Help Me Decide (continued)

3. Enter the information to narrow your options. Required fields are indicated by an asterisk.

Note: The **Products** listed will change depending whether you select **Create the New Business Quote** or **Process a Renewal**.

Note: The **Select Products** section is not displayed until the **Primary Location Zip Code** is selected.

4. Click **Update Results**. The **Results** screen displays with a link to the request that fit the criteria you entered.

Help Me Decide

Please enter the required fields below. The Results section below will help you select the right option for your Quote or Renewal.

**Required Fields*

I'm looking to...*

Create a New Business Quote

Process a Renewal

Select the effective date:*

June Select One 2021

Select the funding type:*

[Contact Us](#) for support around Self-Funded needs.

Fully Insured

Level Funded

Primary Location ZIP Code:*

Enter Zipcode

Select Products:*

Medical - Oxford

Medical - UnitedHealthcare

Dental

Vision

Basic Life

Supplemental Life

Dependent Life

Short Term Disability (STD)


Long Term Disability (LTD)

Update Results



6 | Help Me Decide (continued)

5. Click the link to go to the application to complete your task.



Results

Product: **Medical - UnitedHealthcare**

Create a Medical - UnitedHealthcare Quote

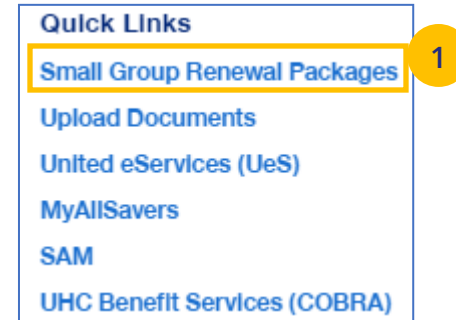
5



6 | Quick Links: Small Group Renewal Packages

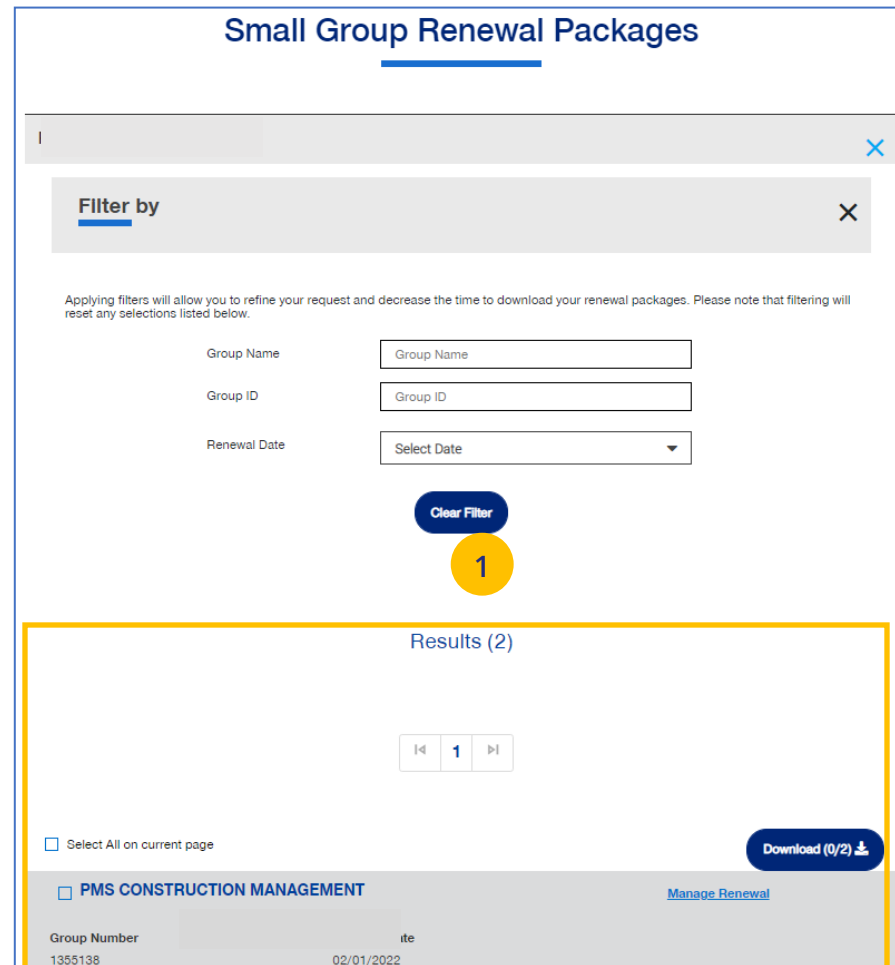
The **Small Group Renewal Packages** link is used to view the renewal documents for groups or brokers.

1. Click **Small Group Renewal Packages**. The **Small Group Renewal Documents** screen displays with the groups listed. You can scroll down to view all the groups.



Quick Links

- Small Group Renewal Packages** 1
- Upload Documents
- United eServices (UeS)
- MyAllSavers
- SAM
- UHC Benefit Services (COBRA)



Small Group Renewal Packages

Filter by

Applying filters will allow you to refine your request and decrease the time to download your renewal packages. Please note that filtering will reset any selections listed below.

Group Name

Group ID

Renewal Date

Clear Filter 1

Results (2)

Select All on current page **Download (0/2)**

Group Number	ite
1355138	02/01/2022

[Manage Renewal](#)



6 | Quick Links: Small Group Renewal Packages (continued)

Note: Multiple Packages – When you search by **Broker ID**, multiple packages can return. Place a checkmark in the boxes for the renewal documents you need to view. You can also put a checkmark in the “Select” box at the top of the window to view all the renewal documents shown on the page. There is a limit of 20 groups per page. You must upload the groups listed on one page at a time.

Note: Filter Results - You can also “filter” the results to narrow the groups you have listed. Using filters is recommended for agencies with many renewals. Click on the Plus sign in the Filter by area. You can filter by **Group Name**, **Group ID**, **Renewal Date** or **Writing Agent**.

The screenshot displays a web interface for managing renewal packages. At the top, there is a header with the text "Select up to 20 documents." and a "Download (0/20)" button. Below this is a "Select All on current page" checkbox. The main content is a table with two rows of data. The first row shows a group with ID "1051 MORRIS |", a renewal date of "05/01/2021", and a "Manage Renewal" link. The second row shows a group with ID "133", a renewal date of "05/01/2021", and a "Manage Renewal" link. Below the table is a "Filter by" section with a plus sign icon. This section contains three input fields: "Group Name", "Group ID", and "Renewal Date" (a date selector). A "Clear Filter" button is located at the bottom of the filter section.

Group Number	Renewal Date	Renewal Document
<input type="checkbox"/> 1051 MORRIS	05/01/2021	Manage Renewal
<input type="checkbox"/> 133	05/01/2021	Manage Renewal

Filter by +

Group Name:

Group ID:

Renewal Date:

[Clear Filter](#)



6 | Quick Links: Small Group Renewal Packages (continued)

2. You can click on the **Renewal Document** link to display the document **or** click the **Manage Renewals** link. If you click the **Download** button, note that only 1,000 renewals can be requested for download at one time.

Note: The **Manage Renewal** link will re-direct you to SAMx FI or SAMx Oxford.

Note: You will not find the renewal package in SAMx. You will find information on the renewal and you can also run a new quote in SAMx.

Select up to 20 documents.
 Select All on current page Download (0/20)

Group Number	Renewal Date	Renewal Document
[Redacted]	05/01/2021	Renewal Document
[Redacted]	05/01/2021	Manage Renewal

UnitedHealthcare Dashboard Quick Quotes Full Shopping KATHLEEN GERBER Logout

Welcome to Sales Automation Management (SAMx)

The SAMx experience leverages updated technology and incorporates your insights and feedback to help us work together better.

You can expect:

- Flexibility to allow you to work the way you work best
- Dependable and consistent experience to quote, enroll and renew your business
- Side-by-side offerings of Medical and Dental and Vision plans

Get started by choosing one of the following action buttons.

Generate Full Quote with Detailed Census

Generate Quick Quote

New Business Dashboard

Renewal Dashboard

[View Recent Activity](#)



6 | Quick Links: Upload Documents

The **Upload Documents** tab allows you to select and upload a specific document. **This only applies if you have permission to upload documents.**

Note: **Upload Documents** is not applicable to **UnitedHealthcare HMO**.

Note: Access to **Upload Documents** is available only to users with the following roles:

- Internal Portal Admin
- Internal Risk Management
- Internal SAMx Admin
- Internal Service
- Internal Underwriting
- Internal Sales
- Employer Lead
- Employer User
- Broker Lead with User Maintenance
- Standard Broker without Commissions
- Broker View Only
- Standard Broker with Commissions

Note: If you have not entered a Group Number previously, you will be asked to search for and find your Group prior to selecting the document to upload.

1. Click the **Upload Documents** link. The **Upload Documents** screen displays.

Quick Links

Small Group Renewal Packages

Upload Documents 1

Upload Documents

1

GROUP NUMBER: [Change Group](#)

Please select a document name and browse your computer for your file. You may upload five documents at a time.

Document Name *

Select Document for Upload *

[Add Row](#) (+)

[Clear Selections](#) [Upload](#)

To check your verification click [here](#)

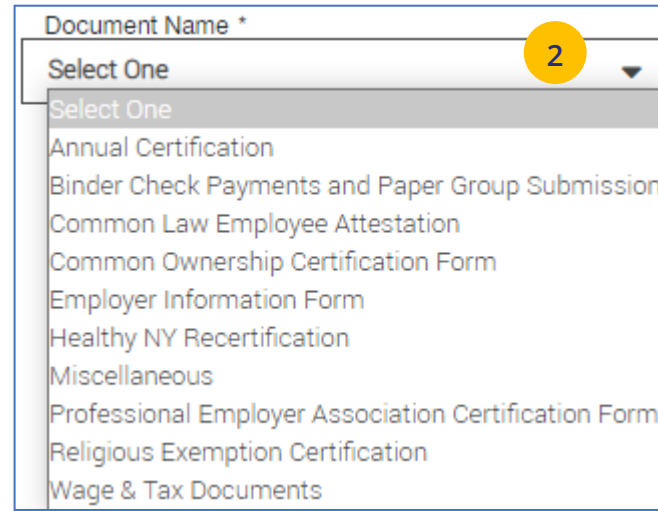
If you have recently submitted information, please allow up to 5 business days for us to process your information and update your status.



6 | Quick Links: Upload Documents (continued)

2. Use the **Document Name** drop-down to select the document you need to upload.
3. Click the **Select Document for Upload** box and attach the document for upload. Repeat this if needed by clicking **Add Row**. You can upload up to five documents at one time.
4. Click **Upload**. A “successfully uploaded” confirmation message will display.

[TABLE OF CONTENTS](#)



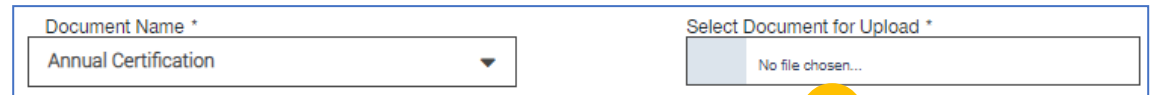
Document Name *

Select One

Select One

- Annual Certification
- Binder Check Payments and Paper Group Submission
- Common Law Employee Attestation
- Common Ownership Certification Form
- Employer Information Form
- Healthy NY Recertification
- Miscellaneous
- Professional Employer Association Certification Form
- Religious Exemption Certification
- Wage & Tax Documents

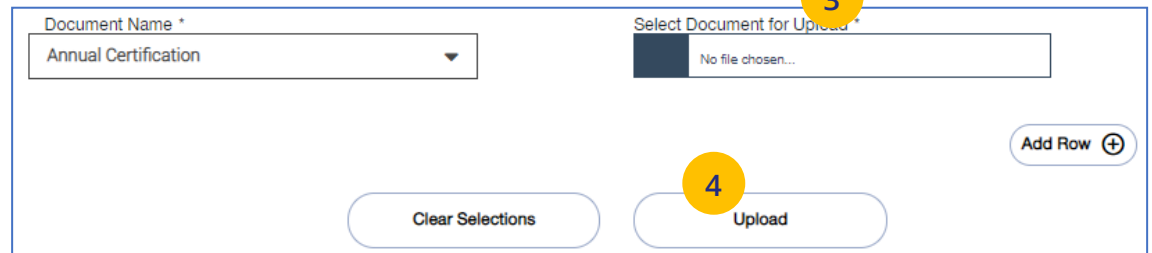
A close-up of the 'Document Name' dropdown menu. The menu is open, showing a list of document types. A yellow circle with the number '2' is positioned over the top right corner of the dropdown menu.



Document Name * Annual Certification

Select Document for Upload * No file chosen...

A single row of the upload form. The 'Document Name' dropdown is set to 'Annual Certification'. The 'Select Document for Upload' box is empty and shows 'No file chosen...'. A yellow circle with the number '3' is positioned over the right side of the 'Select Document for Upload' box.



Document Name * Annual Certification

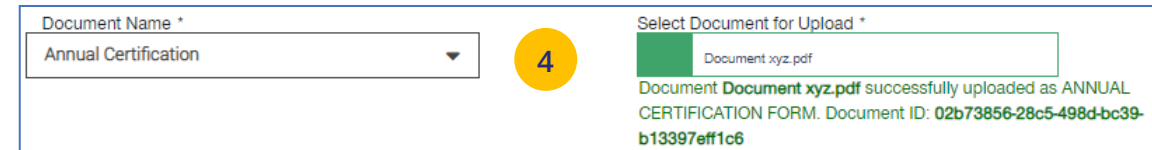
Select Document for Upload * No file chosen...

Add Row +

Clear Selections

Upload

A second row of the upload form. It includes the same dropdown and file selection box as the first row. Below these are four buttons: 'Add Row' with a plus icon, 'Clear Selections', 'Upload', and a yellow circle with the number '4' positioned over the 'Upload' button.



Document Name * Annual Certification

Select Document for Upload * Document xyz.pdf

Document **Document xyz.pdf** successfully uploaded as ANNUAL CERTIFICATION FORM. Document ID: **02b73856-28c5-498d-bc39-b13397eff1c6**

A third row of the upload form. The 'Select Document for Upload' box now contains a green bar and the text 'Document xyz.pdf'. Below the file selection box is a green confirmation message. A yellow circle with the number '4' is positioned over the 'Document Name' dropdown.



6 | Quick Links: United eServices (UeS)

When you click the **United eServices (UeS)** link, you will be taken to the **United eServices** home page.

Note: First Time Access to UeS for Brokers:

- **If you are not registered with United eServices**, click the **Continue** button in the **I Do Not Have a United eServices Account** box. You will then be directed to the home page. After your first access, you will go to the SAM automatically.
- **If you already have a UeS Username and Password**, enter information in the **I Have a United eServices Account** box. Click **Submit**.

Quick Links

[Small Group Renewal Packages](#)

[Upload Documents](#)

[United eServices \(UeS\)](#)

[MyAllSavers](#)

[SAM](#)

[UHC Benefit Services \(COBRA\)](#)



6 | Quick Links: United eServices (UeS) (continued)

Note: Manage My UeS ID – If your UeS account is associated to more than one account, a pop-up screen displays asking you to select the account you want to use. Select the account you need or select All. Then click **Submit**.

Manage My UeS ID

Your account is associated to more than one UeS Account. Please select the account you would like to use from the below list:

jeetp3
 jeetp9

Submit

We identified new association(s) that are not yet established in UeS. Please select any associations from the list below to have them associated to the UeS account selected above.

All

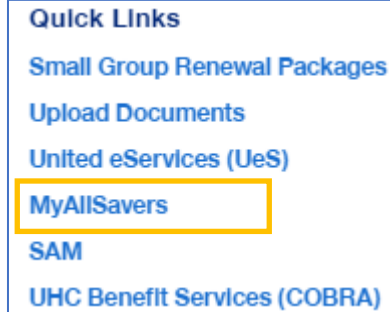
119180 business_name



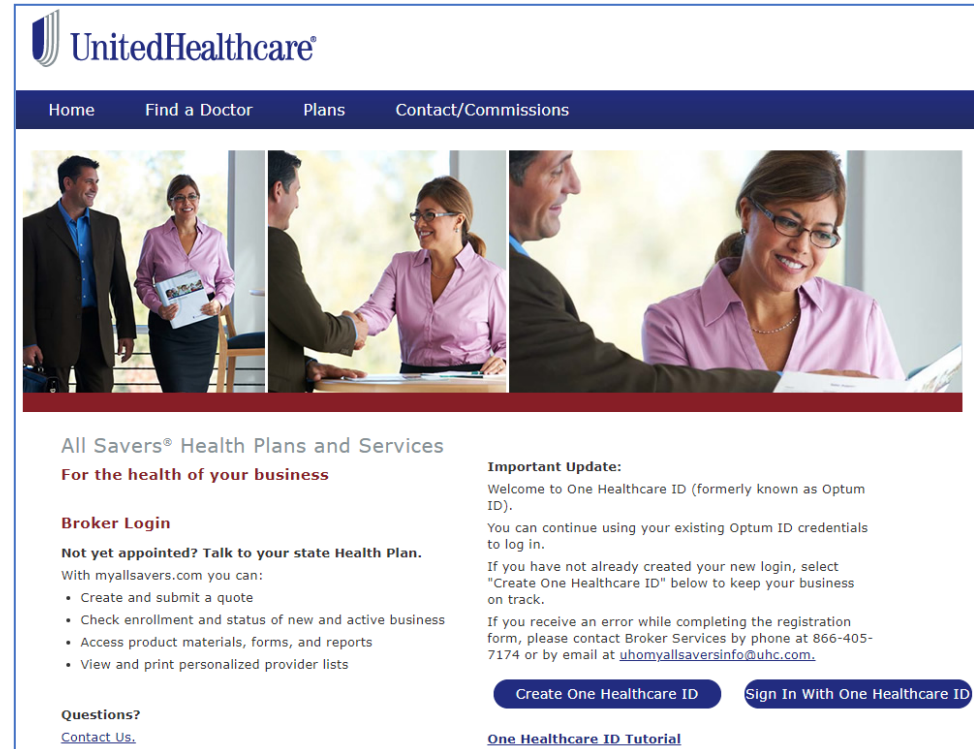
6 | Quick Links: MyAllSavers (Level Funded)

When you click the **MyAllSavers** link, the **All Savers Health Plans and Services** page displays. This is used for all who have Level Funded groups on All Savers.

Note: First Time Access – When you click the **Level Funded** tab the first time, you will have to complete a registration form to link your One Healthcare ID with uhcesservices.com and myallsavers.com. Once you do this you will enjoy the benefits of single sign-on.



A screenshot of a navigation menu titled "Quick Links". The menu items are: "Small Group Renewal Packages", "Upload Documents", "United eServices (UeS)", "MyAllSavers", "SAM", and "UHC Benefit Services (COBRA)". The "MyAllSavers" link is highlighted with a yellow rectangular border.



A screenshot of the UnitedHealthcare website homepage for "All Savers Health Plans and Services". The page features the UnitedHealthcare logo at the top left, a navigation bar with links for "Home", "Find a Doctor", "Plans", and "Contact/Commissions", and a large banner image showing three business professionals in a meeting. Below the banner, the text reads "All Savers® Health Plans and Services For the health of your business". There are sections for "Broker Login" and "Important Update" regarding the One Healthcare ID. At the bottom, there are buttons for "Create One Healthcare ID" and "Sign In With One Healthcare ID", along with links for "Questions? Contact Us." and "One Healthcare ID Tutorial".

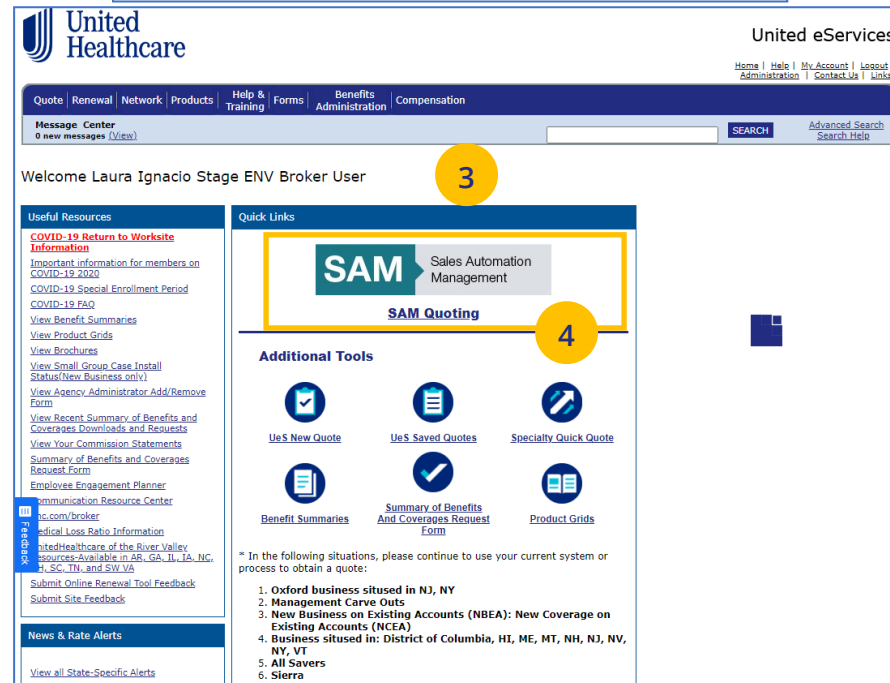
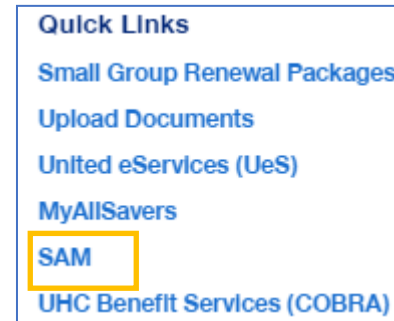
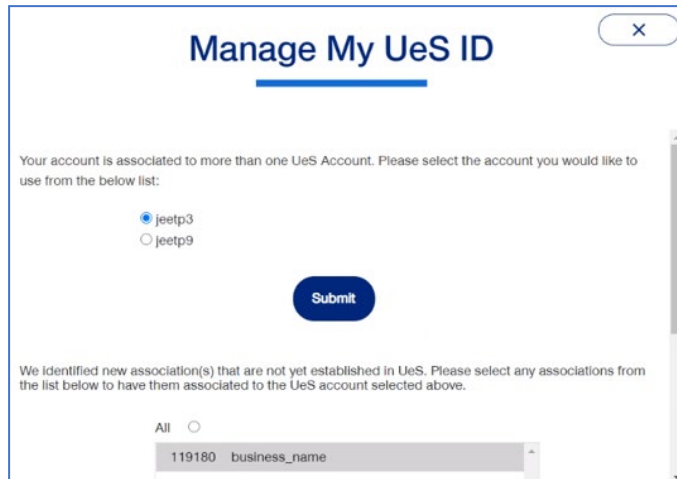


6 | Quick Links: SAM

The **SAM** link allows you to sign on and access United eServices (UeS) to go into the SAM (Sales Automation Management) application.

1. Click the **SAM** link. The **United eServices** sign on screen will display the first time this link is used.
2. Enter your UeS **Username** and **Password**.
3. Click **Submit**. The UeS Home Page displays.
4. Click on the **SAM** button to access SAM.

Note: Manage My UeS ID – If your UeS account is associated to more than one account, a pop-up screen displays asking you to select the account you want to use. Select the account you need or select All. Then click **Submit**.



6 | Quick Links: UHC Benefit Services (COBRA)

The **UHC Benefit Services (COBRA)** link allows you to access the UHC Benefits site for COBRA.

1. Under **Benefits services made simpler**, click **Log in for individuals**. The **Individual access** Login screen displays.
2. Enter your **Username** and **Password** and click **Login**. The **Billing Services Account Screen** displays.

Quick Links

- Small Group Renewal Packages
- Upload Documents
- United eServices (UeS)
- MyAllSavers
- SAM
- UHC Benefit Services (COBRA)**

A yellow box highlights the 'UHC Benefit Services (COBRA)' link, and a yellow circle with the number '1' is positioned to its right.

United Healthcare

Welcome! Let's help you get started with UnitedHealthcare Benefit Services. Please select from the options below so we can better assist you.

Benefits services made simpler

Access streamlined benefits services, featuring a secure easy-to-use portal, superior service and support from a dedicated team, and the highest level of compliance.

Log in for individuals 1

Log in for administrators

Individual access

 2

Username

[Forgot your user name?](#)

Password


[Forgot your password?](#)

[Create an account](#)



6 | Small Group Quoting & Renewal (Fully Insured and Level Funded)

The **Small Group Quoting & Renewal** section directs you to the correct quoting/enrolling and renewal tool, depending on market, funding, etc.

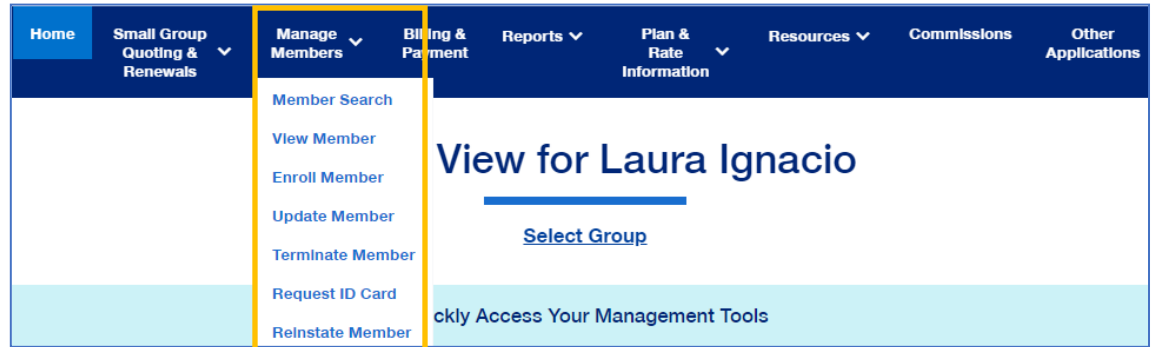
Small Group Quoting & Renewals	Manage Members	Billing & Payment	Reports	Plan & Rate Information	Resources	Commissions	Other Applications	
<p>Help Me Decide</p>  <p>Use Help Me Decide to find right tool for your Quoting and Renewal needs.</p> <p>Get Started →</p>					<p>Fully Insured</p> <p>UnitedHealthcare New Business Quoting SAMx (all states except CA, GA, TX for all effective dates. DE, FL, ND, PR, VA, VI WV will begin with a 4/1 effective date)</p> <p>SAM (CA for all effective dates. DE, FL, MD, PR, VA, VI, WV for 2/1 and 3/1 effective dates)</p> <p>Out of Scope (DC, VT)</p> <p>Oxford New Business Quoting and Renewals SAMx (CT, NY & NJ)</p> <p>UnitedHealthcare Freedom Renewals (effective 4/1/22) and New Business Quoting SAMx (NH)</p> <p>UnitedHealthcare Renewal Processing & Packages (effective 9/1/22) SAMx (all states 4/1/23 effectives excepts CA, GA, TX)</p> <p>UnitedHealthcare Renewal Processing - All other states not listed above SAM (CA, GA, TX only starting with 4/1/23 effectives)</p>			<p>Level Funded</p> <p>New Business Quoting SAMx - Level Funded (all except for VI and Out of Scope Markets) and GA as of 7/1/2022 effective dates</p> <p>MyAllSavers (VI)</p> <p>Out of Scope (HI, NV - under 50, NY - under 100, VT)</p> <p>Renewals</p> <p>SAMx - Level Funded (UHC Level Funded & Oxford Level Funded)</p> <p>MyAllSavers (All Savers - Policy starts with "5400")</p>
		<p>Quick Links</p> <p>Small Group Renewal Packages</p> <p>Upload Documents</p> <p>United eServices (UeS)</p> <p>MyAllSavers</p> <p>SAM</p> <p>UHC Benefit Services (COBRA)</p>						



7 | Manage Members

The **Member Services** tab gives you access to the following:

- Member Search
- View Member
- Enroll Member
- Update Member
- Terminate Member
- Request ID Card
- Reinstate Member




7 | Member Search / View Member

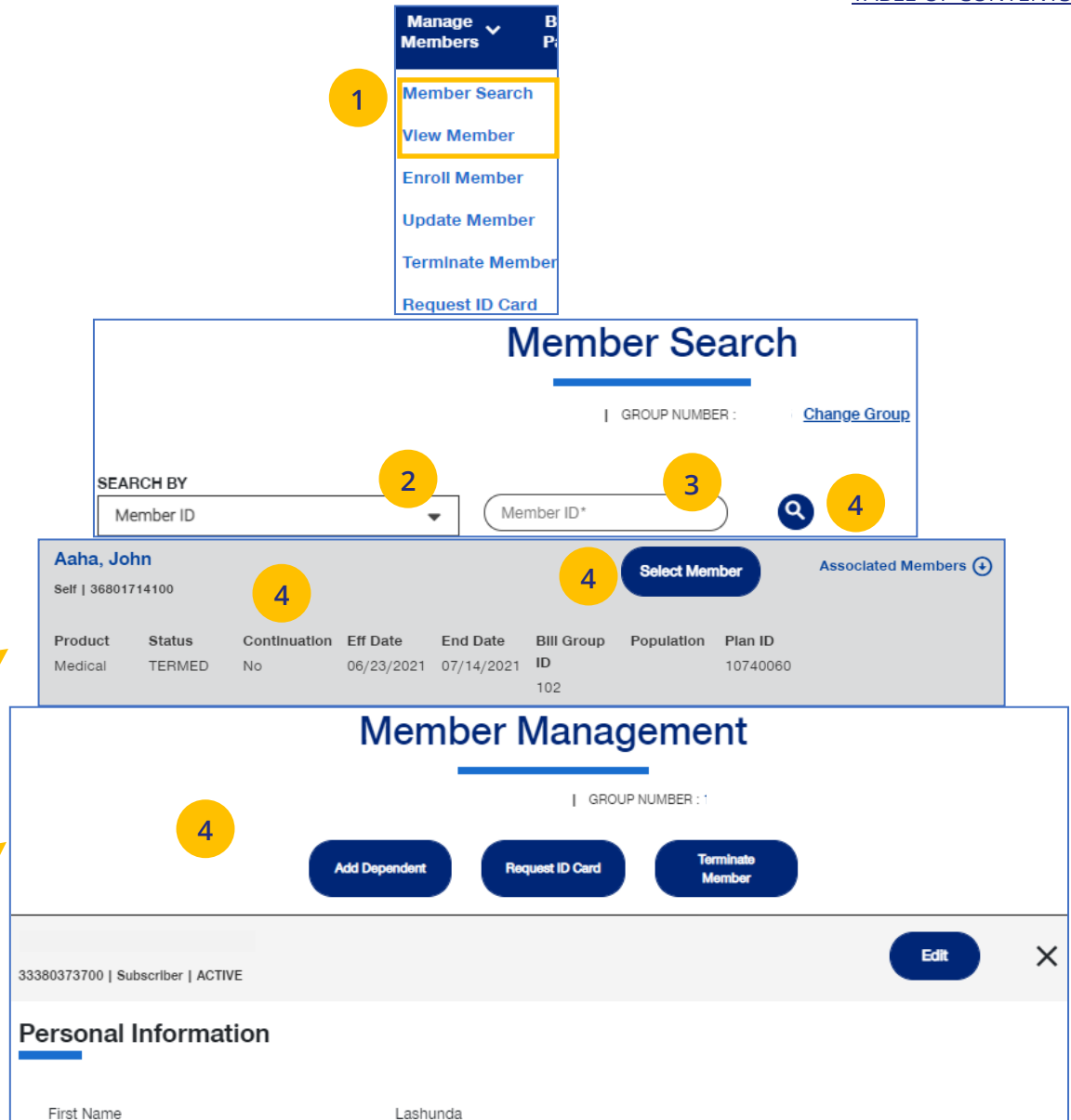
The **Member Search** and **View Member** tabs are used to search for a specific member record. **They both perform the same function.** You can search for a member using one of the following options:

- Member ID
- First and Last Name
- First Name and Last Four Digits of the Social Security Number (SSN)
- Last Name and Last Four Digits of the SSN

To search for a member:

1. Click the **Member Services** tab and select **Member Search**.
2. Select the search criteria from the **Search By** drop-down.
3. Enter the search criteria.
4. Click the **Search** icon .
 - **If you search using any of the Name options**, the search results will be shown. Click **Select Member**. The **Member Management** screen displays with detailed information on the member.
 - **If you search using Member ID**, the **Member Management** screen displays with detailed information on the member.

Note: The **Member Management** screen shows personal, contact and coverage information, including links to Plan Documents (if available).



The screenshot illustrates the workflow for searching and managing a member. It is divided into two main sections: **Member Search** and **Member Management**.

Member Search: This section features a 'Manage Members' dropdown menu (1) with options like 'Member Search' (2), 'View Member', 'Enroll Member', 'Update Member', 'Terminate Member', and 'Request ID Card'. Below this is a search interface with a 'SEARCH BY' dropdown (2) set to 'Member ID', a search input field (3) containing 'Member ID*', and a search icon (4). A 'GROUP NUMBER' field with a 'Change Group' link is also present.

Member Management: This section displays the search results for 'Aaha, John' (Self | 36801714100). It includes a 'Select Member' button (4) and an 'Associated Members' link. Below the member name is a table with the following data:

Product	Status	Continuation	Eff Date	End Date	Bill Group	Population	Plan ID
Medical	TERMED	No	06/23/2021	07/14/2021	ID 102		10740060

Below the table are buttons for 'Add Dependent', 'Request ID Card', and 'Terminate Member'. A 'GROUP NUMBER : 1' field is also visible. At the bottom, there is a 'Personal Information' section with a 'First Name' field containing 'Lashunda' and an 'Edit' button.

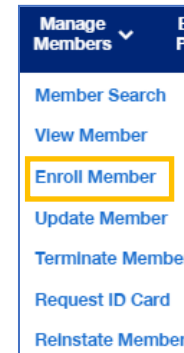


8 | Enroll Member

Enroll Member is used to add a new member or new dependent member to a group.

1. Click the Manage Members tab and select **Enroll Member**.


Note: If you have not done so, you will be asked to enter a group number.




Member Enrollment

GROUP NUMBER : [View Group Information](#)
[Change Group](#)

Who are you enrolling?



New Member



Dependent
(Add to existing family)

[Cancel](#)




8 | Enroll Member: Demographics

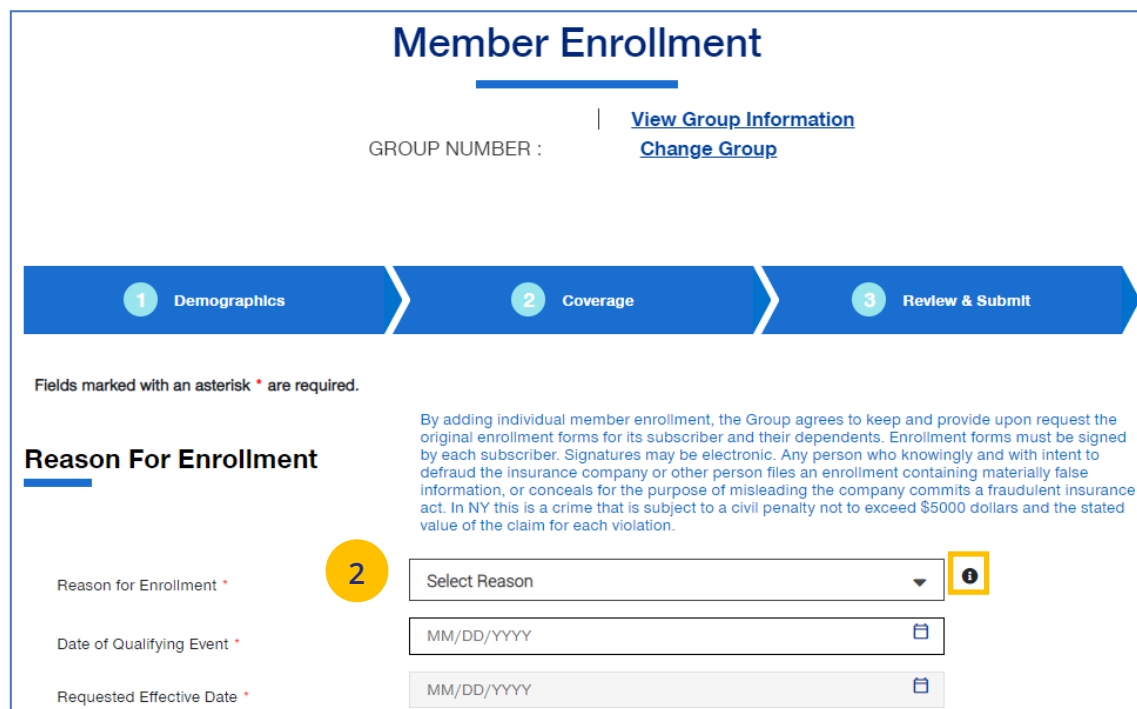
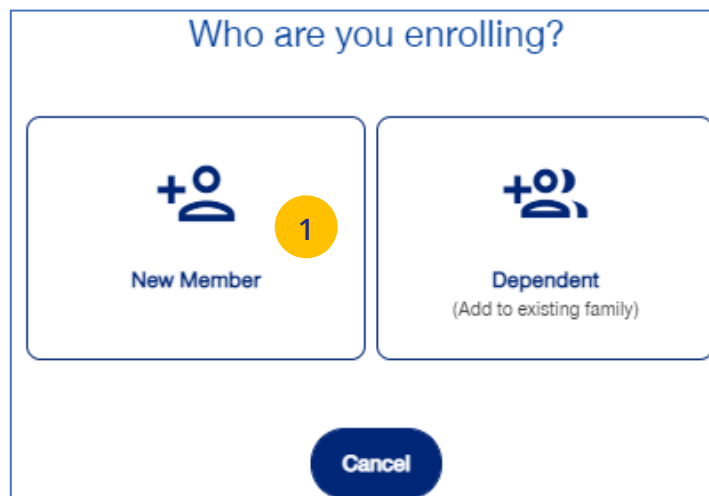
The enroll member process walks you through the **Demographics** and **Coverage** sections, then asks you to **Review & Submit** the new member information.

To enroll a new member:

2. Click the **New Member** box. The **Member Enrollment** detail screen displays.
3. Enter the **Reason for Enrollment**.

Note: COBRA Enrollment – If you are enrolling a member into **COBRA**, select **Continuation. IMPORTANT:** An active member must be **terminated** from their current enrollment before being enrolled in COBRA. The member’s COBRA coverage will automatically be terminated at the end of their coverage period unless the member terminates coverage earlier.

Note: An information icon  will display at the end of the **Reason for Enrollment** field. Click the icon to display a **Reason for Enrollment** pop-up box that shows more information on active enrollment and COBRA enrollment. **See the screen on the following page.**



8 | Enroll Member: Demographics (continued)

3. Enter the qualifying event date in the **Date of Qualifying Event** field.

Note: If you select **New Hire** or **Initial Enrollment** for the **Reason for Enrollment**, the **Requested Effective Date** will populate after you enter the **Date of Qualifying Event**. The **Waiting Period Rules** indicate the specific rules that will apply for effective dates based on the group contract. You can override the **Requested Effective Date** if needed. After enrollment is submitted, the system will display the **Actual Effective Date** you entered.

Note: For UnitedHealthcare HMO – If one of the COBRA options is selected for **Reason for Enrollment**, the **Date of Qualifying Event** can go back up to 36 months.

4. If you need to override the date shown, enter the effective date in the **Requested Effective Date** field. Follow your state guidelines applicable to effective dates.
Note: If no plans are available for the **Qualifying Event** and **Requested Effective Date**, the message “There are no plans available at this time” displays.

Reason For Enrollment

For Active Enrollment
Select the enrollment reason that best describes the event that allows the member to enroll.

- New Hire: Adding a new member outside of open enrollment period qualifies for health care coverage.
- Open Enrollment: Period of time when employees may elect or change benefit options as they qualify for health care coverage.
- Benefit Selection: Selecting benefits during open enrollment qualifies for health care coverage.
- COBRA: Continuing benefits after leaving a company qualifies for health care coverage. For many employers, benefit continuation after employment is covered by COBRA.
- Initial Enrollment: Adding a new member outside of the open enrollment period qualifies for health care coverage.
- Late Enrollee: Adding a new member outside of the open enrollment period qualifies for health care coverage.
- Loss of Coverage: Adding a new member outside of open enrollment period qualifies for health care coverage.
- Plan Change: Changing benefit plans outside of open enrollment qualifies for health care coverage.
- Re-Enrollment: Re-enrolling a member qualifies for health care coverage. For example, members might cancel their coverage and then apply for coverage again.
- Rehire: Leaving the company and being rehired qualifies for health care coverage.
- Special Enrollment - Adoption: Adopting a child qualifies for health care coverage.
- Special Enrollment - Birth: Having a baby qualifies for health care coverage.
- Special Enrollment - Marriage: Adding a spouse or dependents because of marriage qualifies for health care coverage.

Reason For Enrollment

By adding individual member enrollment, the Group agrees to keep and provide upon request the original enrollment forms for its subscriber and their dependents. Enrollment forms must be signed by each subscriber. Signatures may be electronic. Any person who knowingly and with intent to defraud the insurance company or other person files an enrollment containing materially false information, or conceals for the purpose of misleading the company commits a fraudulent insurance act. In NY this is a crime that is subject to a civil penalty not to exceed \$5000 dollars and the stated value of the claim for each violation.

Reason for Enrollment * ⓘ

Date of Qualifying Event * **3** ⓘ

Requested Effective Date * **4** ⓘ

⚠️ Waiting Period Rules

- 1292605 :**
Coverage will be effective on the first day of the month following 02 month(s) after the date of qualifying event date.



8 | Enroll Member: Demographics (continued)

5. Enter information in the **Subscriber information** fields. **Note: Social Security Number - For UnitedHealthcare HMO users, the Select Reason SSN Not Provided dropdown will not be available.**

Note: Custom Attributes – If a Group has requested it, custom attribute fields will be displayed. If displayed, entry in these fields is required.

6. Enter the enrollee’s contact information in the **Contact Information** fields.
7. Click **Add Dependent** or **Next**.

Note: Home Zip Code – If the zip code you entered has no plans available, the message **“Unfortunately, there are no plans available based on your Zip Code selection. Please call customer service at 866-908-5940”** displays when you click Next. **This applies to groups with Doctors, Navigate Now or Charter plans.**

Subscriber Information

First Name *	<input type="text" value="First Name"/>
Middle Name	<input type="text" value="Middle Name"/>
Last Name *	<input type="text" value="Last Name"/>
Suffix	<input type="text" value="Select Suffix"/>
Birth Date *	<input type="text" value="MM/DD/YYYY"/>
Gender *	<input type="text" value="Select Gender"/>
Social Security Number *	<input type="text" value="XXX-XX-XXXX"/> OR <input type="text" value="Select Reason SSN not Provided"/>
Date of Hire *	<input type="text" value="03/05/2022"/>
Employment Status	<input type="text" value="Select Status"/>

5

⚠ Please note: If the date of hire field is different from the date of qualifying event date, the requested effective date may change based on enrollment business rules.

Contact Information

Home Address Line 1 *	<input type="text" value="Address Line 1"/>
Home Address Line 2	<input type="text" value="Address Line 2"/>
Home Zip Code *	<input type="text" value="Zip Code"/>
Home City *	<input type="text" value="Home City"/>
Home State *	<input type="text" value="Select State"/>
Home Phone	<input type="text" value="(XXX) XXX-XXXX"/>
Work Phone	<input type="text" value="(XXX) XXX-XXXX"/>
Mobile Phone	<input type="text" value="(XXX) XXX-XXXX"/>
Preferred Phone	<input type="text" value="Select Phone"/>
Email Address	<input type="text" value="abc@xyz.com"/>

6

7



8 | Enroll Member: Coverage - Medical

1. In the **Coverage** section, enter the subscriber's **Medical** coverage information in the **Medical Information** area.

Note: Based on the zip code you entered previously, if there are plans available based on that zip code, this message displays in blue: **“Based on your zip code, the following plans are available are available for you to choose from.” This applies to groups with Doctors, Navigate Now or Charter plans.**

Note: For **UnitedHealthcare HMO**, fields shown under **Medical** will be **Plan, HMO Provider ID** and **Current Patient Indicator**. **Plan** and **HMO Provider ID** are required. The **Billing Group** and **Population** fields are not available for UnitedHealthcare HMO users.

Medical Information

Plan*

HMO Provider ID* [Find Provider](#)

Current Patient Indicator Yes No

2. Click **Next**.

✓ Demographics > **2 Coverage** > 3 Review & Submit

Fields marked with an asterisk * are required.

John Sunnyside
Subscriber

Medical Information

Based on your Zip code, the following plans are available for you to choose from **1**

Would you like to change to this coverage? Yes No

Billing Group*

Coverage Population*

Plan*

Provider Type

Provider Location ID [Find Provider](#)

[Add Additional Provider](#)

[Cancel](#) [Previous](#) **Next** **2**



8 | Enroll Member: Coverage - Medical (continued)

Note: Some groups may be set-up with **PV (Plan Variation)** and **RC (Reporting Code)** structure.

For those groups, they will see those options on the Coverage screen. Use the drop down boxes to select the **PV** (Plan Variation) and **RC** (Reporting Code). The **Find Coverage** button will be enabled and the **Billing Group** will be populated. Then select the **Plan**.

Entry in these fields is optional based on the group setup.

The form is titled "Medical Information" and is part of a three-step process: 1. Demographics, 2. Coverage, and 3. Review & Submit. The "Coverage" step is currently active.

Medical Information

Yes No

PV * Select PV

RC * Select RC

Find Coverage

Medical Information

Yes No

PV * 0005 - NON-UNION_1

RC * 0005 - NON-UNION_1

Find Coverage

Billing Group * 1193101-BILLGROUP

Plan * Select Plan

Provider Type Select Provider Type

Provider Location ID Provider Location ID Find Provider



8 | Enroll Member: Coverage - Specialty, Basic Life and AD&D

1. If the subscriber has **Specialty (Medical, Dental or Vision) and/or Basic Life and AD&D** coverage, enter information in the fields shown.

Note: Dental and Vision are currently not applicable to **UnitedHealthcare HMO**.

2. Click **Next**.

The screenshot displays a multi-section enrollment form. At the top right, a yellow circle with the number '1' is overlaid on the form. Each section includes a heading, a sub-heading, a question with radio buttons, and three dropdown menus. The sections are: Dental Information, Vision Information, Basic Life Information, and AD&D Information. The 'Dental Information' and 'Vision Information' sections have their 'Yes' radio buttons selected. The 'Basic Life Information' and 'AD&D Information' sections have their 'No' radio buttons selected. At the bottom of the form are three buttons: 'Cancel', 'Previous', and 'Next'.

Section	Question	Selected	Billing Group	Coverage Population	Plan
Dental Information	Would you like to change to this coverage?	Yes	1362976-Bill Group Desc	POP1 - POP1	26071100 - plan dental Dental 0P604
Vision Information	Would you like to change to this coverage?	Yes	1362976-Bill Group Desc	POP1 - POP1	26071101 - plan vision Vision VH076
Basic Life Information	Would you like to change to this coverage?	No	1362976-Bill Group Desc	Select Population	Select Plan
AD&D Information	Would you like to change to this coverage?	No	1362976-Bill Group Desc	Select Plan	Select Plan



8 | Enroll Member: Review & Submit

1. Review the information.
 - o If you need to edit any of the enrollment information shown, click the **Edit** button.
2. If all the information is correct, scroll down and click **Submit**.

A confirmation message displays telling you that **“Member Enrollment is successful.”** You will be presented with the Member ID number and a link to the Member Record.

Reason For Enrollment		Edit
Reason for Enrollment	Initial Enrollment	1
Requested Effective Date	02/01/2021	
Date of Qualifying Event	02/01/2021	

Coverage		Edit
Medical Information		
Billing Group	1362976 - Bill Group Desc	2
Coverage Population	POP1 - POP1	
Plan	26030486 - plan1 AL G CHC NG 5/5/5000/50 HMO 22 COMK	
Provider Type		
Provider Location ID		

By adding individual member enrollment, the Group agrees to keep and provide upon request the original enrollment forms for its subscriber and their dependents. Enrollment forms must be signed by each subscriber. Signatures may be electronic. Any person who knowingly and with intent to defraud the insurance company or other person files an enrollment containing materially false information, or conceals for the purpose of misleading the company commits a fraudulent insurance act. In NY this is a crime that is subject to a civil penalty not to exceed \$5000 dollars and the stated value of the claim for each violation.

Enrollment Status

John Sweetwater
Subscriber

Medical Information

Member Enrollment is successful!




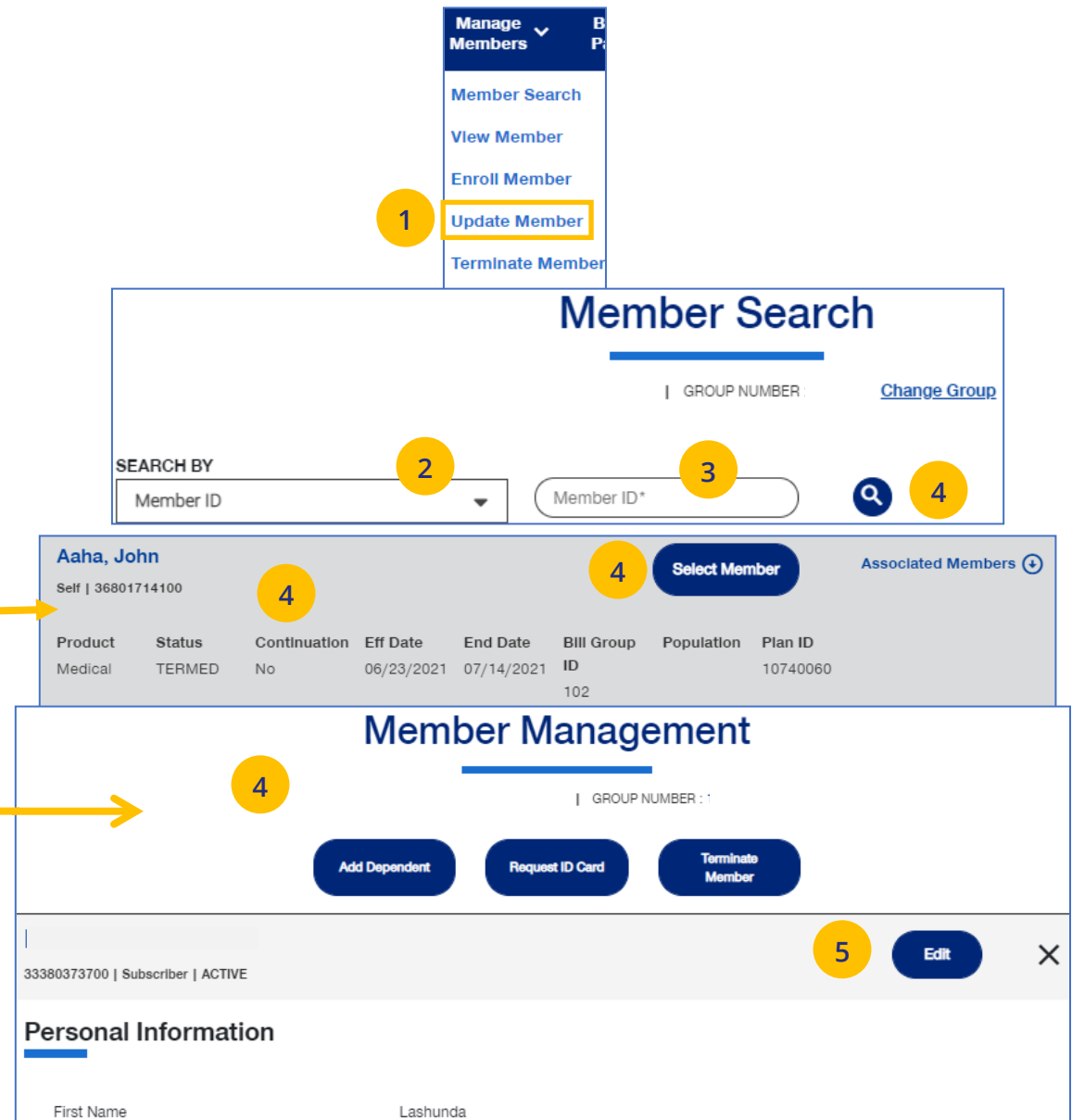
7 | Update Member

Update Member is used to search for and edit a specific member record. You can search for a member using one of the following options:

- Member ID
- First and Last Name
- First Name and Last Four Digits of the Social Security Number (SSN)
- Last Name and Last Four Digits of the SSN

To search for and edit member information:

1. Select **Update Member**.
2. Select the search criteria from the **Search By** drop-down.
3. Enter the search criteria.
4. Click the **Search** icon 
 - **If you search using any of the Name options**, the search results will be shown. Click **Select Member**. The **Member Management** screen displays with detailed information on the member.
 - **If you search using Member ID**, the **Member Management** screen displays with detailed information on the member. **Note:** The **Member Management** screen shows personal, contact and coverage information, including links to Plan Documents (if available).
5. Click the **Edit** button.



Manage Members dropdown menu options:

- Member Search
- View Member
- Enroll Member
- Update Member**
- Terminate Member

Member Search screen:

SEARCH BY: Member ID (dropdown) | Member ID* (input) | Search icon

Search results for **Aaha, John** (Self | 36801714100):

Product	Status	Continuation	Eff Date	End Date	Bill Group ID	Population	Plan ID
Medical	TERMED	No	06/23/2021	07/14/2021	102		10740060

Member Management screen:

Buttons: Add Dependent, Request ID Card, Terminate Member

Personal Information section:

33380373700 | Subscriber | ACTIVE | Edit button

Personal Information fields: First Name: Lashunda



7 | Update Member (continued)

6. Update the needed information in the **Demographics** section if needed. You will have to scroll to see all fields.

Note: Updating SSN: If you previously did not include a Social Security Number with a Reason Code, you can now update this number and remove the Reason Code. Once you save the updated Social Security Number, you will not be able to edit. If you entered the wrong social security number when editing, contact Client Services for help.

Note: Social Security Number - For **UnitedHealthcare HMO** users, the **Refusal to Provide** dropdown will not be available.

7. Click **Save & Continue**. The message “Updates saved successfully” will be shown and the **Coverage** screens will display.

Member Update

GROUP NUMBER :

1 Demographics 2 Coverage 3 Review & Submit

Louis Dylan
Subscriber | FUTURE

Subscriber Information

6

First Name *	<input type="text" value="Louis"/>
Middle Name	<input type="text" value="Middle Name"/>
Last Name *	<input type="text" value="Dylan"/>
Suffix	<input type="text" value="Select Suffix"/>
Birth Date *	<input type="text" value="06/16/1992"/>
Gender *	<input type="text" value="Male"/>
Social Security Number *	<input type="text" value="XXX-XX-XXXX"/> OR <input type="text" value="Refusal To Provide"/>

7

Cancel or Exit Save Save and Continue



7 | Update Member (continued)

- Update the needed information in the **Coverage** section if needed. You will have to scroll to see all fields.

Note: Billing Group – In the Billing Group area, you can narrow your search for a billing group by typing in the first few letters or number in the billing group.

Billing Group * 1201 - TOTAL MORTGAGE SERVICES, LLC - 1718478

Note: Billing Group – For **UnitedHealthcare HMO** users, **Billing Group** is not available.

Note: Basic Life Updates - Any updates to Basic Life must be made by contacting Broker & Employer Services.

- Click **Save & Continue**.
- When you have completed your updates, review your information and click **Submit**. A “Changes submitted successfully” message will display, telling you the member information has been updated successfully.

Member Update

| GROUP NUMBER :

✓ Demographics 2 Coverage 3 Review & Submit

Updates saved successfully.

Louis Dylan
Subscriber | FUTURE

Coverage Effective Date 8

Requested Effective Date MM/DD/YYYY

Medical Information

Would you like to change to this coverage? Yes No

Cancel or Exit Previous Save & Continue 9

Submit 10

Changes submitted successfully.




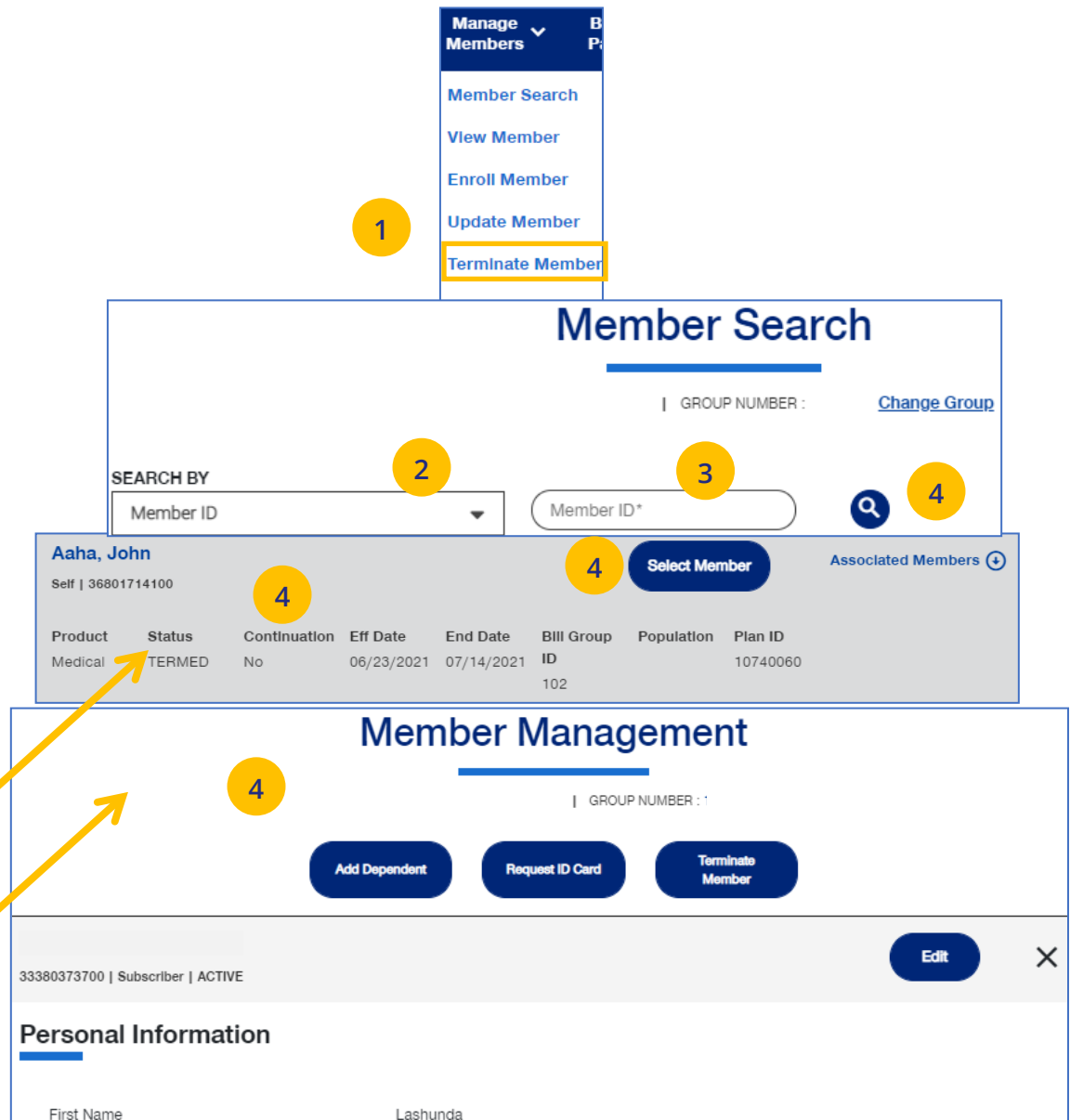
7 | Terminate a Member's Coverage

The **Terminate Member** tab is used to search for and terminate a specific member record. You can search for a member using one of the following options:

- Member ID
- First and Last Name
- First Name and Last Four Digits of the Social Security Number (SSN)
- Last Name and Last Four Digits of the SSN

To search for and terminate a member:

1. Select **Terminate Member**.
 2. Select the search criteria from the **Search By** drop-down.
 3. Enter the search criteria.
 4. Click the **Search** icon .
- **If you search using any of the Name options**, the search results will be shown. Click **Select Member**. The **Member Management** screen displays with detailed information on the member.
 - **If you search using Member ID**, the **Member Management** screen displays with detailed information on the member.



The screenshot illustrates the process of terminating a member's coverage. It shows two main screens: **Member Search** and **Member Management**.

Member Search: A dropdown menu labeled "Manage Members" (1) is open, showing options like "Member Search", "View Member", "Enroll Member", "Update Member", and "Terminate Member" (highlighted in yellow). Below this, the "SEARCH BY" dropdown (2) is set to "Member ID". The search criteria input field (3) contains "Member ID*", and the search icon (4) is visible.

Member Management: This screen displays detailed information for a member named "Aaha, John" (Self | 36801714100). A "Select Member" button (4) is present. Below the member name is a table with the following data:

Product	Status	Continuation	Eff Date	End Date	Bill Group ID	Population	Plan ID
Medical	TERMED	No	06/23/2021	07/14/2021	102		10740060

Below the table are buttons for "Add Dependent", "Request ID Card", and "Terminate Member". At the bottom, there is an "Edit" button and a close icon (X).



7 | Terminate a Member's Coverage (continued)

5. Click **Terminate Member**. The **Terminate Member Benefits** screen displays.
6. In the **Termination Reason** section, use the **Select Reason** dropdown to enter the reason for the termination.

Note: COBRA Termination – For COBRA Terminations, select **Discontinue COBRA** for the **Termination Reason**.

7. Enter the requested termination date in the **Requested Termination Date** field.

Note: Help with Determining Date – When you click the **Help with Determining Date** link, the following pop-up box displays:

Help with Determining Date

The term date should be the last day of coverage. Example – if coverage runs through January and member should not have coverage in February, the term date is 1/31/XX. If there should be no coverage at all (delete coverage), then term date should be one day prior to coverage effective date. Example – if coverage began 2/1/XX and you need to delete the coverage entirely, term the member 1/31/XX.

8. Click the information icon **i** after **Requested Effective Date**. A **Waiting Period Rules** box indicates rules that apply for termination dates based on the group contract. Click the **X** in the upper-right corner to return to the **Terminate Member Benefits** screen.

Member Management

GROUP NUMBER :

Add Dependent Request ID Card **Terminate Member** 5

Louis Dylan 54867991300 | Subscriber | FUTURE Edit X

Personal Information

Terminate Member Benefits

GROUP NUMBER :

Reason for Termination

Termination Reason* 6 Select Reason

Requested Termination Date* 7 MM/DD/YYYY

Help with Determining Date 8

Waiting Period Rules

Termination will be effective on the last day of the month of the qualifying termination event.



7 | Terminate a Member's Coverage (continued)

9. Scroll down to the **Member Information** section and click the **Select** box for each member whose coverage is being terminated.
10. Click **Next**. The **Terminate Member Benefits** screen displays, asking you to confirm that the information is correct.

Note: If you terminate the coverage for the subscriber, the system will also select all dependents for termination.

Member Information

Multiple selections are allowed. Please select each applicable row.

John Doe Subscriber Male	Member ID 70514124400	Date of Birth 01/01/1972	Effective Date 04/01/2020	Status ACTIVE	Select <input checked="" type="checkbox"/> Medical
Jane Doe Spouse Female	Member ID 70514124401	Date of Birth 02/01/1972	Effective Date 04/01/2020	Status ACTIVE	Select <input checked="" type="checkbox"/> Medical
Jonathan Doe Child Male	Member ID 70514124402	Date of Birth 07/19/2001	Effective Date 04/01/2020	Status ACTIVE	Select <input checked="" type="checkbox"/> Medical
Janet Doe Child Female	Member ID 70514124403	Date of Birth 08/11/2006	Effective Date 04/01/2020	Status ACTIVE	Select <input checked="" type="checkbox"/> Medical
Jack Doe Child Male	Member ID 70514124404	Date of Birth 08/08/1998	Effective Date 04/01/2020	Status ACTIVE	Select <input checked="" type="checkbox"/> Medical

By adding individual member enrollment, the Group agrees to keep and provide upon request the original enrollment forms for its employees and their dependents. Enrollment forms must be signed by each employee. Signatures may be electronic. Any person who knowingly and with intent to defraud the insurance company or other person files an enrollment containing materially false information, or conceals for the purpose of misleading the company commits a fraudulent insurance act. In NY this is a crime that is subject to a civil penalty not to exceed \$5000 dollars and the stated value of the claim for each violation.


10



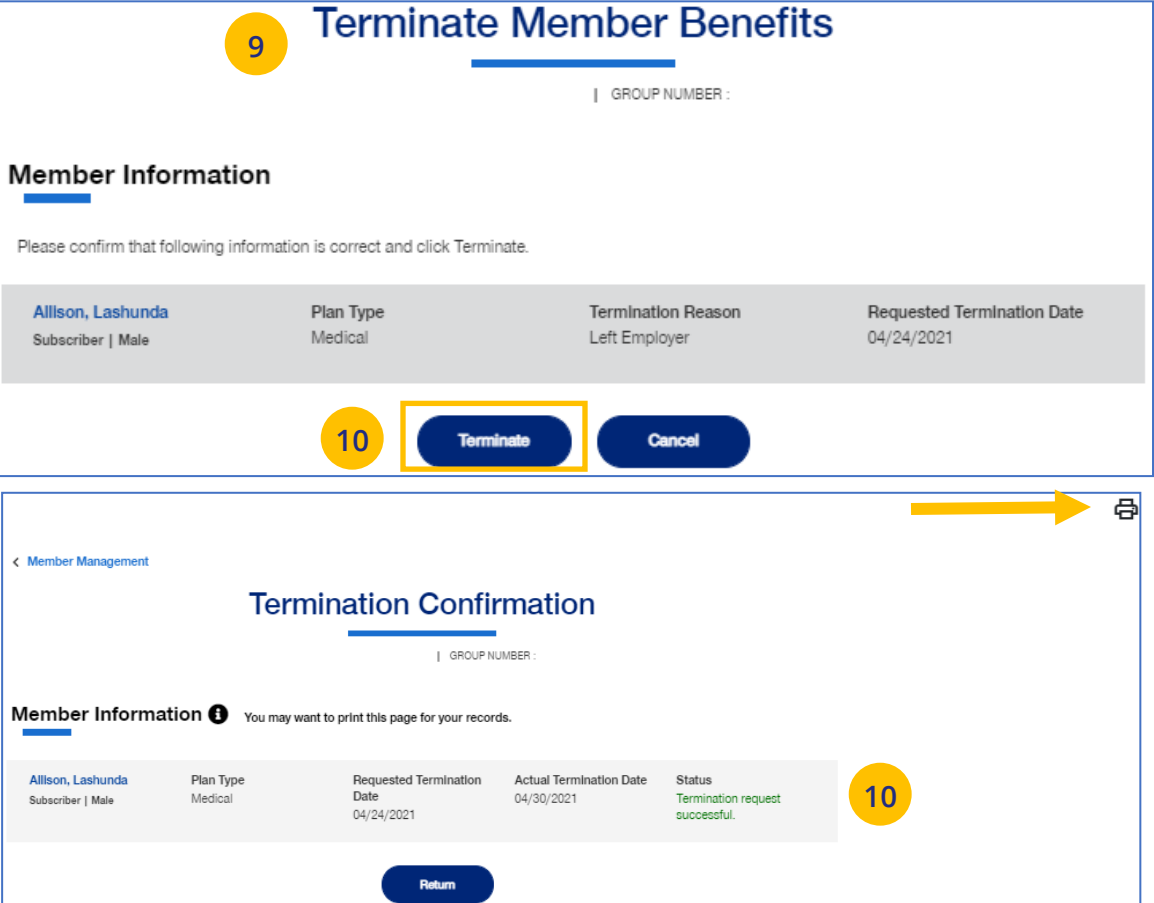
7 | Terminate a Member's Coverage (continued)

11. Click **Terminate**. A message displays telling you the member has been terminated successfully.

Note: Print Termination Confirmation

Option – If you want paper confirmation when the Termination Confirmed message displays, click the Print icon  to print the termination confirmation.

Note: Group Termination: When a Group is terminated, Broker access to the Group is no longer available from the uhceservices.com website (as of the Group termination date).



The image shows two screenshots from a web application. The top screenshot is titled "Terminate Member Benefits" and features a yellow circle with the number "9" in the top left. Below the title is a "GROUP NUMBER:" field. Underneath is a "Member Information" section with a blue underline. A message reads: "Please confirm that following information is correct and click Terminate." Below this is a table with the following data:

Member Name	Plan Type	Termination Reason	Requested Termination Date
Allison, Lashunda Subscriber Male	Medical	Left Employer	04/24/2021

At the bottom of this screen are two buttons: "Terminate" (highlighted with a yellow box and a yellow circle with "10") and "Cancel".

The bottom screenshot is titled "Termination Confirmation" and features a yellow circle with the number "10" in the top right. It has a "GROUP NUMBER:" field. Below is a "Member Information" section with a blue underline and an information icon. A message reads: "You may want to print this page for your records." Below this is a table with the following data:

Member Name	Plan Type	Requested Termination Date	Actual Termination Date	Status
Allison, Lashunda Subscriber Male	Medical	04/24/2021	04/30/2021	Termination request successful.

At the bottom of this screen is a "Return" button. A yellow arrow points to a print icon in the top right corner of the screenshot.



7 | Request a Health Plan ID Card


The **Request ID Card** tab is used to search for a member and then (1) request an ID card be mailed to that member, or (2) print an ID card. You can search for a member using one of the following options:

- Member ID
- First and Last Name
- First Name and Last Four Digits of the Social Security Number (SSN)
- Last Name and Last Four Digits of the SSN

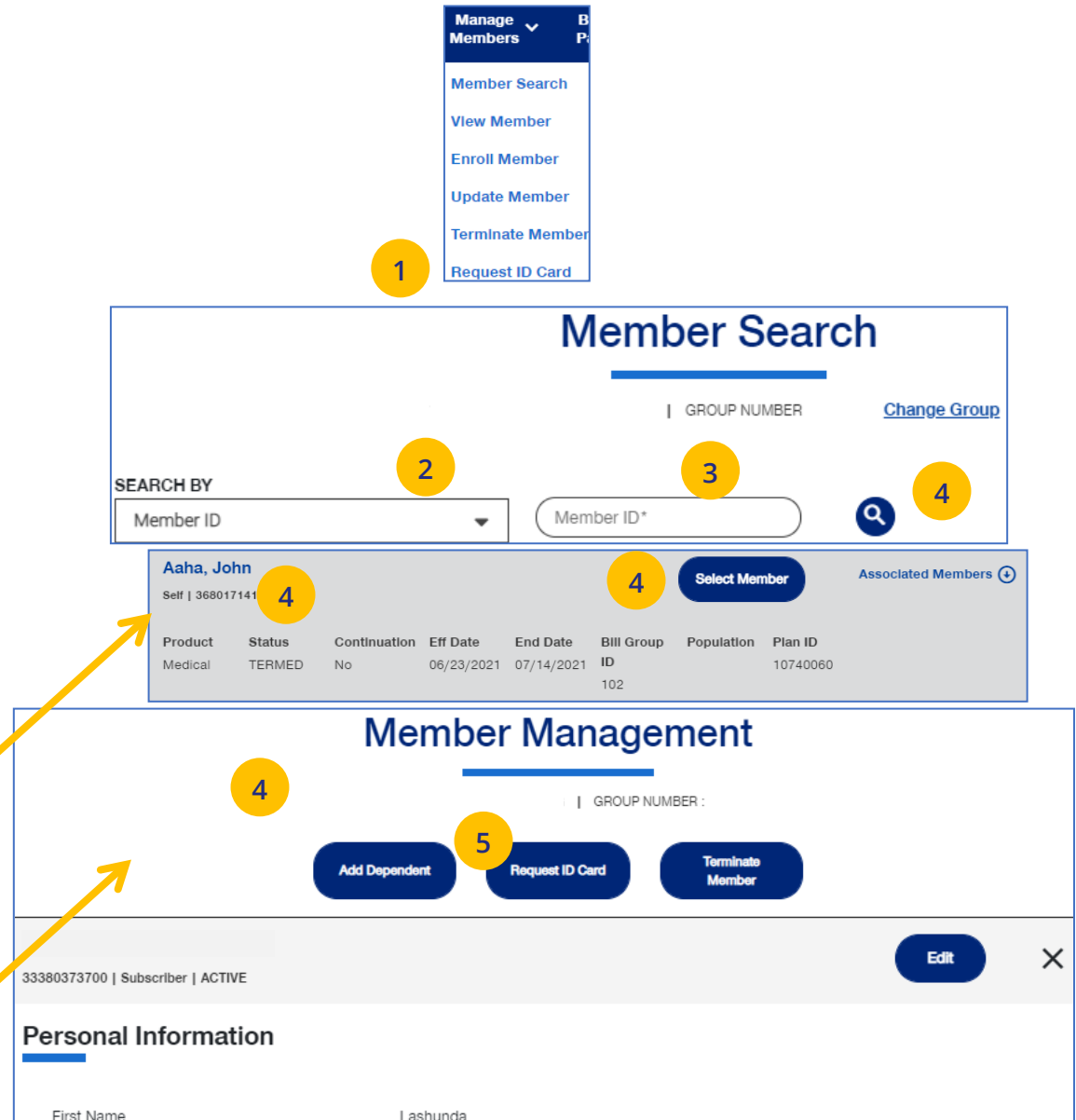
To Request an ID Card:

1. Select **Request ID Card**.
2. Select the search criteria from the **Search By** drop-down.
3. Enter the search criteria.

Note: If you search by Member Name, the next screen will show the **Request ID Card** button.

4. Click the **Search** icon 
 - **If you search using any of the Name options**, the search results will be shown. Click **Select Member**. The **Member Management** screen displays with detailed information on the member.
 - **If you search using Member ID**, the **Member Management** screen displays with detailed information on the member.

5. Click **Request ID Card**.



The screenshot shows the 'Member Search' and 'Member Management' screens. A 'Manage Members' dropdown menu is open, with 'Request ID Card' highlighted (1). The 'Member Search' screen has a 'SEARCH BY' dropdown set to 'Member ID' (2) and a search input field containing 'Member ID*' (3). A search icon (4) is to the right. Below the search bar, a search result for 'Aaha, John' is shown (4), with a 'Select Member' button (4). A table of member details is displayed below the result:

Product	Status	Continuation	Eff Date	End Date	Bill Group	Population	Plan ID
Medical	TERMED	No	06/23/2021	07/14/2021	ID 102		10740060

The 'Member Management' screen shows the 'Request ID Card' button (5) and an 'Edit' button. Below the management buttons, the member's information is displayed: '33380373700 | Subscriber | ACTIVE' and 'Personal Information' with 'First Name' as 'Lashunda'.



7 | Request a Health Plan ID Card (continued)

6. Select the member and (1) click **Print ID Card** to print the card or save it as a pdf, **or** (2) click **Order ID Card** to order the card. For **Dental** cards, only **Print ID Card** is available. The message “Request sent successfully” displays. Repeat this for other members or dependents if needed.

Note: If any dependent is classified as “infant,” their status must be changed to “Child” before a Health Plan ID card can be ordered or printed.

Note: If there is a member change, it will take 24 to 48 hours for a new ID card to be available.

Note: Level Funded groups have the capability to print ID cards for an entire group. Click the **Download Group IDs** button. The download will be available in the **Message Center**.



Note: Only **Medical ID Cards** are available for **UnitedHealthcare HMO** users.

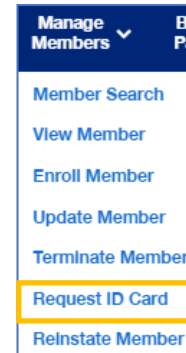


8 | Request Health Plan ID Cards for Entire Group (Level Funded Groups)

For Level Funded groups, you have the option to request health plan ID cards for all members in a group. This applies to Level Funded Medical plans only.

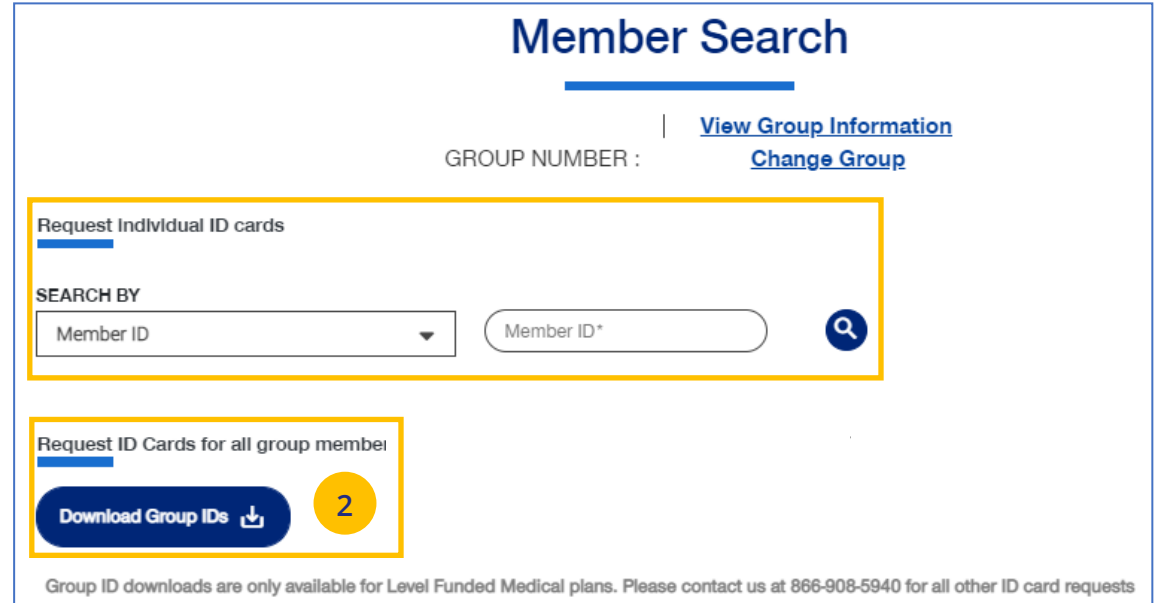
To Request Health Plan ID cards for an Entire Group (Level Funded Only)

1. Select **Request ID Card**. You will have the option to (1) Request individual ID cards, or (2) Request ID Cards for all group members.
2. Click **Download Group IDs**. A message displays telling you that the Medical; ID Cards will be posted in message center when ready.



Manage Members ▾ | Bl Pa

- Member Search
- View Member
- Enroll Member
- Update Member
- Terminate Member
- Request ID Card**
- Reinstate Member



Member Search

GROUP NUMBER : [View Group Information](#)
[Change Group](#)

Request Individual ID cards

SEARCH BY

Member ID Member ID*

Request ID Cards for all group members

[Download Group IDs](#)

Group ID downloads are only available for Level Funded Medical plans. Please contact us at 866-908-5940 for all other ID card requests



Request ID Cards for all group members

[Download Group IDs](#)


We have received your request. The medical ID card PDFs will be posted in message center when ready. Please note that if not available immediately, it can take up to 24 hours to process.

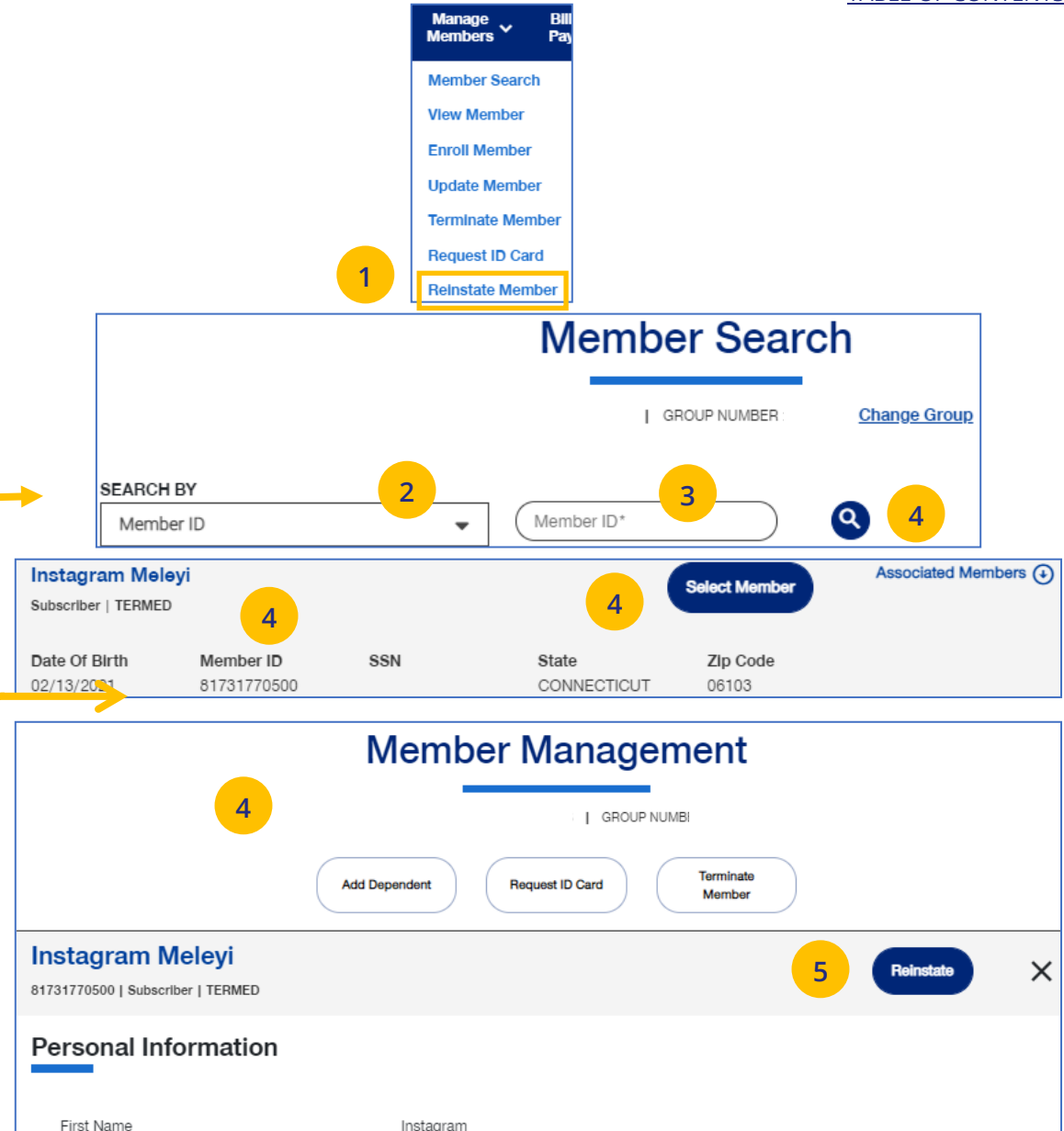


7 | Reinstate Member

Reinstate Member is used to reinstate a member, and dependents if needed, who were previously terminated. The reason can be for COBRA and non-COBRA reasons.

To search for and reinstate a termed member:

1. Select **Reinstate Member**.
2. Select the search criteria from the **Search By** drop-down.
3. Enter the search criteria.
4. Click the **Search** icon 
 - **If you search using any of the Name options**, the search results will be shown. Click **Select Member**. The **Member Management** screen displays with detailed information on the member.
 - **If you search using Member ID**, the **Member Management** screen displays with detailed information on the member. **Note:** The **Member Management** screen shows personal, contact and coverage information, including links to Plan Documents (if available).
5. Click the **Reinstate** button.



The screenshot illustrates the process of reinstating a member through a web application. It is divided into two main sections: Member Search and Member Management.

Member Search Section:

- 1:** A dropdown menu under "Manage Members" is open, with "Reinstate Member" highlighted in yellow.
- 2:** The "SEARCH BY" dropdown menu is set to "Member ID".
- 3:** The search input field contains "Member ID*".
- 4:** The search icon (magnifying glass) is highlighted.

Member Management Section:

- 4:** The member profile for "Instagram Meleyi" is shown, with a "Select Member" button highlighted.
- 4:** The "Personal Information" section is visible, showing "First Name" as "Instagram".
- 5:** The "Reinstate" button is highlighted in the Member Management interface.

Yellow arrows point from the text instructions to the corresponding numbered callouts in the screenshots.



7 | Reinstate Member (continued)

- Update the needed information in the **Demographics** sections: **Reason for Enrollment**, Date of Qualifying Event. **Contact Information** is an optional section that can be edited at this time for the member being reinstated. You will have to scroll down to see all fields.

Note: Updating SSN: If you previously did not include a Social Security Number with a Reason Code, you can now update this number and remove the Reason Code. Once you save the updated Social Security Number, you will not be able to edit. If you entered the wrong social security number when editing, contact Client Services for help.

Note: Social Security Number - For UnitedHealthcare HMO users, the **Refusal to Provide** dropdown will not be available.

- Click **Save and Continue**. The message “Updates saved successfully” will be shown and the **Coverage** screens will display.

Reinstate Member

GROUP NUMBER :

1 Demographics 2 Coverage 3 Review & Submit

Reason For Enrollment

By adding individual member enrollment, the Group agrees to keep and provide upon request the original enrollment forms for its subscriber and their dependents. Enrollment forms must be signed by each subscriber. Signatures may be electronic. Any person who knowingly and with intent to defraud the insurance company or other person files an enrollment containing materially false information, or conceals for the purpose of misleading the company commits a fraudulent insurance act. In NY this is a crime that is subject to a civil penalty not to exceed \$5000 dollars and the stated value of the claim for each violation.

Reason for Enrollment *

Date of Qualifying Event *

Requested Effective Date *

Instagram Meleyi
Subscriber | TERMED

Reinstatement for this subscriber may fail based on the group's rules.

Subscriber Information

First Name*

Cancel Save and Continue



7 | Reinstate Member (continued)

- Update information in the **Coverage** section if needed. You will have to scroll to see all fields.
Note: Billing Group – In Billing Group, you can narrow your search by typing in the first few letters or number in the billing group.

Billing Group * 1201 - TOTAL MORTGAGE SERVICES, LLC - 1718478

Note: Billing Group – For **UnitedHealthcare HMO** users, Billing Group is not available.

Note: Basic Life - Any updates to Basic Life must be made by contacting Broker & Employer Services.

- Click **Save & Continue**.
- After completing updates, review your information and click **Submit**. A “Changes submitted successfully” message displays, telling you the member has been updated.

Newborn to Child Status – If a child dependent is in temporary **newborn** status, the coverage will terminate unless the child is enrolled as a new dependent. Once the newborn is enrolled, the status changes to **child**. If the child dependent has already been terminated, go through the reinstatement process, if needed, to reinstate the child dependent. **Remember that terminated employees must be reinstated before any dependents can be enrolled or reinstated.**

Note: Twins with the same last name and date of birth cannot be enrolled. Call Client Services at 1-866-908-5940.

Member Update

GROUP NUMBER :

Demographics Coverage Review & Submit

Updates saved successfully.

kath Bennett
Subscriber | ACTIVE

Coverage Effective Date

Requested Effective Date MM/DD/YYYY

Medical Information

Do you want to reinstate this coverage? Yes No

Billing Group * 1030902 - CT LIBERTY HMO GATED BASE PLAN

Plan * 10740060 - CT LIBERTY HMO GATED BASE PLAN | CT LIBERTY

Provider Effective Date 06/10/2021

Provider Type * PCP

Provider Location ID * 4576279 Find Provider

PCP 4576279

Cancel or Exit Previous Save & Continue

Submit

Changes submitted successfully.



8 | Billing & Payment

The **Billing & Payment** tab is used to (1) display billing and payment information related to a specific group, or (2) make a payment.

1. Click the **Billing & Payment** tab. The **Billing & Payment** selection screen displays.
2. You have two options:
 - o Click **Pay as Billed** to go through a series of screens to pay the bill, **or**
 - o Click **Go to Billing Home** to display the group's billing and payment information.

Note: Billing and Payment information for UnitedHealthcare HMO users is available on Employer eServices. Click the link on the Billing & Payment screen to go to Employer eServices.

Billing & Payment

HOSEMAN, INC. | GROUP NUMBER : 004284 [Change Group](#)

UnitedHealthcare HMO group Billing and Payment information is available on Employer eServices

[Click here to go to Employer eServices](#)

Billing & Payment

| GROUP NUMBER : [Change Group](#)

Amount Due: \$31,702.48

[Go to Billing Home](#) **Pay as Billed**



8 | Billing & Payment: Pay as Billed

To pay a bill from the **Billing & Payment** tab, follow the steps below.

1. Click the **Billing & Payment** tab. The **Billing & Payment** selection screen displays.
2. Click **Pay as Billed**. The **Select Payment Options** screen displays. Make changes (if needed) and click **Review & Submit**.

The screenshot displays the 'Billing & Payment' interface. At the top, a navigation bar includes 'Home', 'Small Group Quoting & Renewals', 'Manage Members', 'Billing & Payment' (highlighted with a yellow box and a '1' in a yellow circle), 'Plan & Rate Information', 'Resources', 'Commissions', and 'Other Applications'. Below the navigation bar, the main heading is 'Billing & Payment'. Underneath, there is a 'GROUP NUMBER' field with a 'Change Group' link. A large 'Amount Due: \$31,702.48' is displayed. Below this, there is a 'Go to Billing Home' link and a 'Pay as Billed' button (highlighted with a yellow box and a '2' in a yellow circle). Below the main interface, a 'Select Payment Options' dialog is shown. It displays the same 'Amount Due: \$31,702.48'. The 'Payment Method' is set to 'Operating' with a dropdown arrow and an 'Add Payment Method' link. The 'Date' is set to '06/06/2022' with a calendar icon. At the bottom of the dialog, there is a 'Cancel' button and a 'Review & Submit' button (highlighted with a yellow box and a '2' in a yellow circle).



8 | Billing & Payment: Pay as Billed (continued)

1. Review the payment details and click **Submit Payment**. You will receive confirmation on your payment.


Note: Click the **Back** button if the payment details need to be changed.

Review Payment Details

Payment Method	Amount	Date
Operating	\$31,702.48	06/06/2022


Back
3
Submit Payment

Payment Confirmation

 **Thank you for your payment!** 3

Your payment information has been scheduled successfully. The confirmation number for this payment is 635958511626. Please click Confirmation PDF to save a record of this payment.

For all other billing needs or to manage payment methods, [click here](#) to see other billing options.

Group Name: MID ISLAND Y JCC
Group Number: 1373201
 Confirmation PDF 

Total Payment: \$31,702.48
Confirmation Number: 635958511626
Payment Account: Operating
Payment Submitted Date: 06/06/2022
Payment Date: 06/06/2022

Invoice Date	Invoice Number	Due Date	Bill Group	Total Amount Due	Amount Paid	Reason Code
04/07/2022	154855369949	05/01/2022	1030101	\$31,702.48	\$31,702.48	Pay as billed



8 | Billing & Payment: Go to Billing Home

To display a group's billing information, follow the steps below.

1. Click the **Billing & Payment** tab. The **Billing & Payment** selection screen displays.
2. Click **Go to Billing Home**. The **Billing & Payment** information displays.

The screenshot shows the 'Billing & Payment' interface. At the top, the navigation bar includes 'Home', 'Small Group Quoting & Renewals', 'Manage Members', 'Billing & Payment' (highlighted with a yellow box and a '1' callout), 'Plans', 'Plan & Rate Information', 'Resources', 'Commissions', and 'Other Applications'. Below the navigation bar, the main heading is 'Billing & Payment' with a blue underline. Underneath, it says 'MID ISLAND Y JCC | GROUP NUMBER : 1373201' and a 'Change Group' link. The 'Amount Due' is displayed as '\$31,702.48' with a '1' callout. Below this, there is a 'Go to Billing Home' link (highlighted with a yellow box and a '2' callout) and a 'Pay as Billed' button.

The lower section of the screenshot shows the 'Account Summary' for 'MID ISLAND Y JCC' with a 'Billing Customer Number' of 1373201. It lists 'Last Payment Rec'd' as 04/04/2022 for \$31,702.48 and 'Next Payment Due Date' as 06/06/2022 for \$31,702.48. The 'Current Balance' is \$31,702.48. Below this is the 'Open Invoice Listing' section with a 'Filter by' dropdown (containing 'No filter applied' and a '2' callout) and a 'Make Payment' button. The table below shows one invoice with a total amount of \$31,702.48 and an outstanding balance of \$31,702.48.

Pay	Invoice Date ↑↓	Invoice Number ↑↓	Due Date ↑↓	Policies	Bill Group ↑↓	Invoice Type ↑↓	Payment(s) Pending	Adjustment(s) Pending	Amount	Outstanding Balance
<input type="checkbox"/>	04/07/2022	154855369949	05/01/2022	396426	1030101	List	Yes	No	\$31,702.48	\$31,702.48
Total									\$31,702.48	\$31,702.48

Aging
 Note: The Aging amounts displayed here are calculated based on the filters applied in the Open Invoice Section

Future	0-30	30-60	61-90	91-120	120+	Total past due balance
\$0.00	\$0.00	\$31,702.48	\$0.00	\$0.00	\$0.00	\$31,702.48

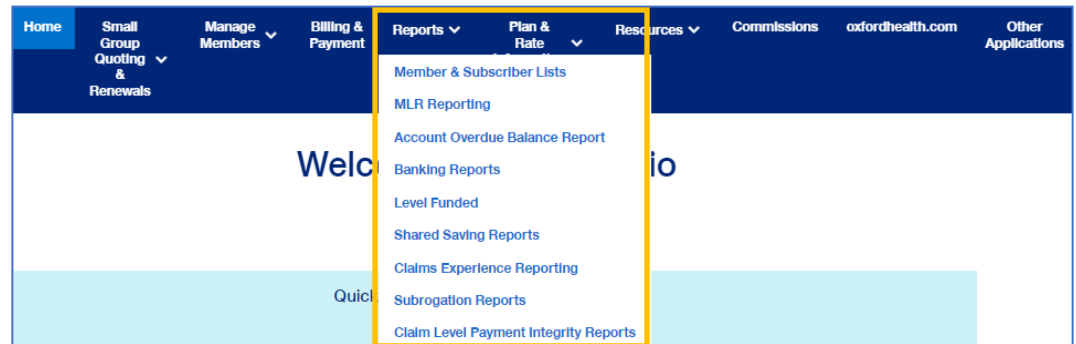


9 | Reports

You can use the **Reports** tab to generate specific reports.

- **Member & Subscriber Lists** that shows all subscribers or members affiliated with the Group.
- **MLR Reporting** tab used to access the annual report on rebates as mandated by the Medical Loss Ratio provision of the health care reform.
- **Account Overdue Balance Report** reports show groups with (1) late payments, or (2) terminations due to lack of payment.
- **Banking Reports** that show daily, monthly and historical banking reports for the Group.
- **Level Funded** reports that show the Monthly Executive Summary, the IRS Documents 6055 and IRS documents 1095 B reports.
- **Shared Savings Reports (ASO Groups Only)** that show summary and detailed information on claims for a specific group (month and year).
- **Claims Experience Reporting** provides access to claim experience reporting used to monitor plan performance through utilization and incurred costs.
- **Subrogation Reports (ASO Groups Only)** show monthly reports or reports for a specific date range.
- **Claim Level Payment Integrity Reports (ASO Groups Only)** show reports for a specific month and year.

Note: **Member & Subscriber Lists** is the only report option currently available for **UnitedHealthcare HMO** users.



9 | Member & Subscriber Lists

To generate the Member or Subscriber List:

1. Click the **Reports** tab.
2. Select **Member & Subscriber Lists**. The **Member & Subscriber Lists** screen is shown.

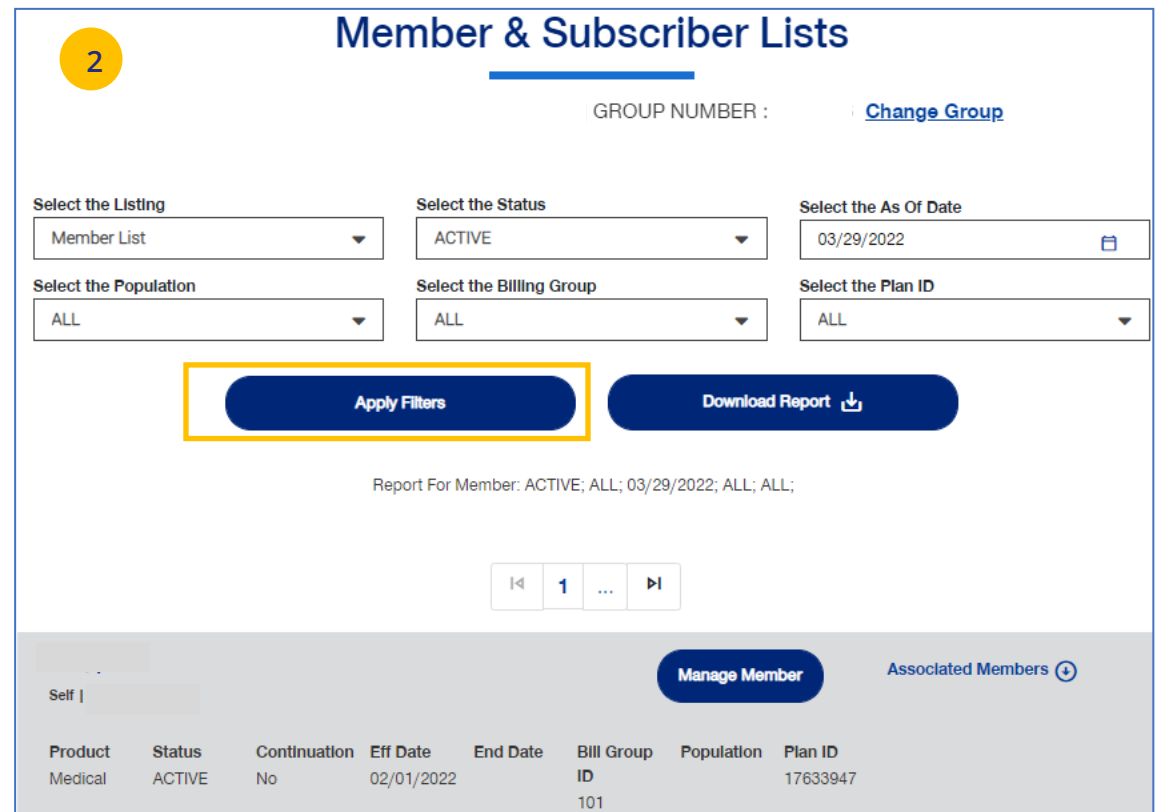
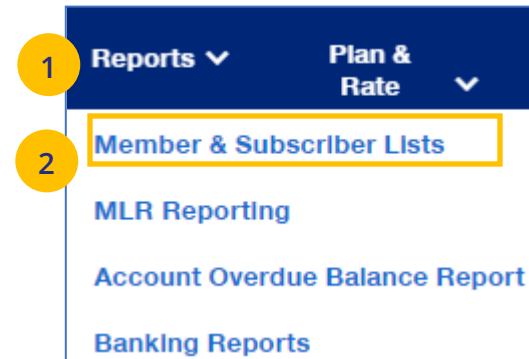
Note: Member List is the default and the default report will be shown when the screen displays. Just scroll down to view members in the report who met the default search criteria.

Note: The **Select the Billing Group** and **Select the Plan ID** fields are not available for **UnitedHealthcare HMO** users.

To Change the Search Criteria: Use the dropdowns in each field to enter the needed information. Fields include:

- Member List or Subscriber List
- Status (All Including Incomplete, All Excluding Complete, Active, Pending, Termined, Incomplete)
- As of Date
- Population
- Billing Group
- Plan ID

After selecting your search criteria, click **Apply Filters**. Scroll down to view the members or subscribers that met your search criteria.



9 | Member & Subscriber Lists (continued)

To generate the Member or Subscriber List:

3. Click **Download Report**. A message indicates that you will be notified in the **Message Center** when your report is ready. When the report is ready a number will be displayed next to the bell icon.

Member & Subscriber Lists

| GROUP NUMBER : [Change Group](#)

Select the Listing	Select the Status	Select the As Of Date
Member List	ACTIVE	03/29/2022
Select the Population	Select the Billing Group	Select the Plan ID
ALL	ALL	ALL

[Apply Filters](#) [Download Report](#)

Report For Member: ACTIVE; ALL; 03/29/2022; ALL; ALL;

Your request to download the report is successful. You will be notified in the Message Center when your report is complete.

United Healthcare 3 2 Laura Igna... Stage ENV



9 | Member & Subscriber Lists (continued)

4. Click on the bell icon to open **Message Center**.
5. Click on the plus sign.
6. Click on the attachment link to display the report.

Note: After you have finished using the report, you can delete it from the **Message Center** by checking the box and clicking the **Delete Selected** button.

The screenshot shows the United Healthcare Message Center interface. At the top, there is a navigation bar with the United Healthcare logo, a notification bell icon with a '2' (highlighted with a yellow box and a '4'), a user profile icon for 'Laura Igna... Stage ENV', and a settings gear icon. The main content area is titled 'Message Center' and includes a 'SORT BY:' dropdown menu set to 'Date Descending' and a 'Delete Selected' button. Below this is a pagination control showing '1' of 1 items. A table lists messages with columns for 'Date/Time', 'From', and 'Subject'. The first message is from 'SYSTEM' with the subject 'Member Subscriber List'. A plus sign icon (+) is highlighted with a yellow box and a '5' next to it. Below the table, the details of the selected message are shown, including 'To: Ilgnacio2', 'From: SYSTEM', 'Date: 2021-03-01 09:09:15.0', 'Message Expiration Date: 2021-06-01 09:09:17.0', 'Subject: Member Subscriber List', and 'Attachments and Links: MembersListReport.xlsx' (highlighted with a yellow box and a '6').

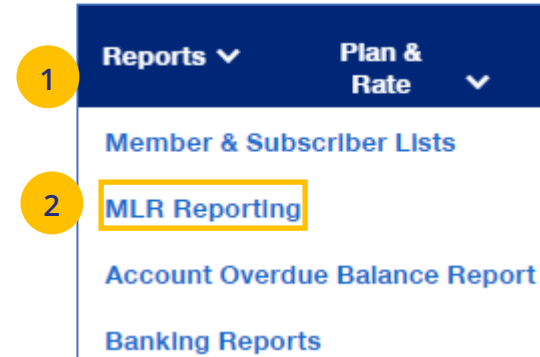


9 | MLR Reporting

The **MLR Reporting** tab allows you to generate the Medical Loss Ratio (MLR) Information report. You can download the report as a pdf document or as an Excel file.

Note: This report is not available for **UnitedHealthcare HMO** users.

1. Click the **Reports** tab.
2. Select **MLR Reporting**. The **MLR Reporting** screen displays with the report. Brokers will see a list of associations to pick from.
3. You can view a snapshot of the report in the window or click Export to PDF to generate a pdf file or Export as Excel to download an Excel report.



The 'MLR Reporting' screen features a title 'MLR Reporting' with a 'Change Broker' link below it. There are two buttons: 'Export as PDF' and 'Export as Excel'. A yellow circle with the number '3' is above the 'Export as PDF' button. Below the buttons is a pagination control showing '1' in a box, with left and right arrows. A yellow circle with the number '2' is above the table. The table contains the following data:

Policy Year	Policy #	Legal Entity	State	MLR Case Size	MLR Reported Percentage	Aggregate Premium Revenue	Aggregate Rebate Amount Owed	Distributed Rebate Amt for Employer Policy
2018	01Y1351	UnitedHealthcare Insurance Company	USALA	L	81.900%	\$300,537,476.50	\$9,316,661.77	\$2,185.29
2018	09Y7576	Optimum Choice, Inc.	USADC	S	78.700%	\$4,395,553.69	\$57,142.20	\$6.47

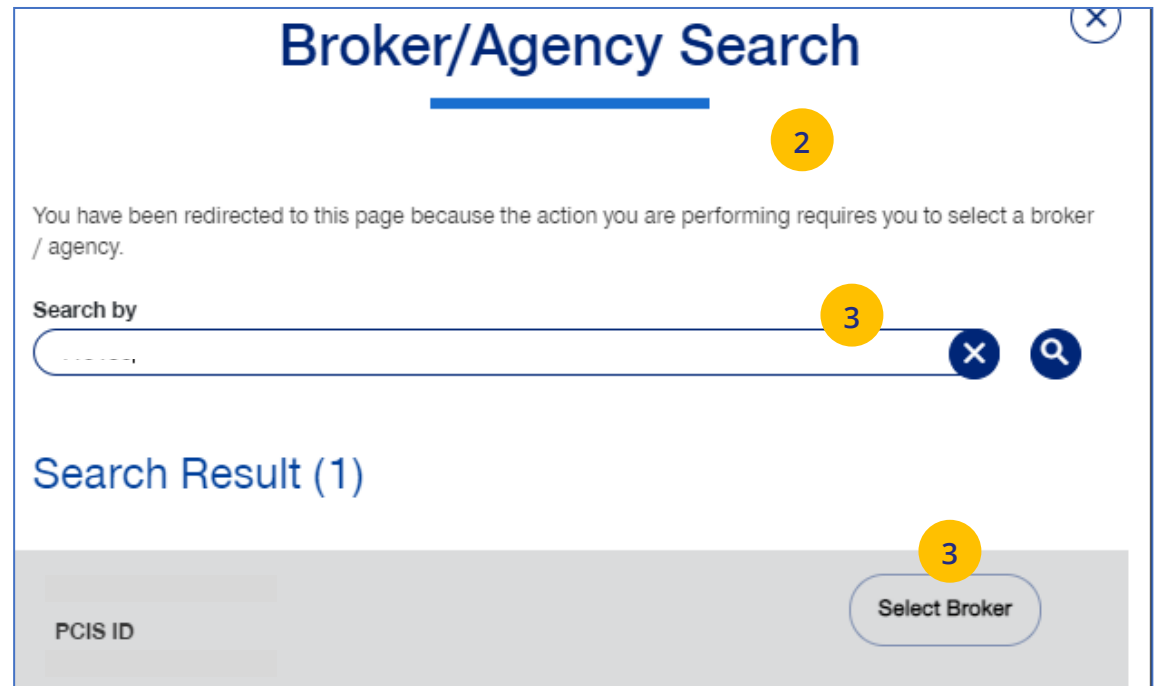
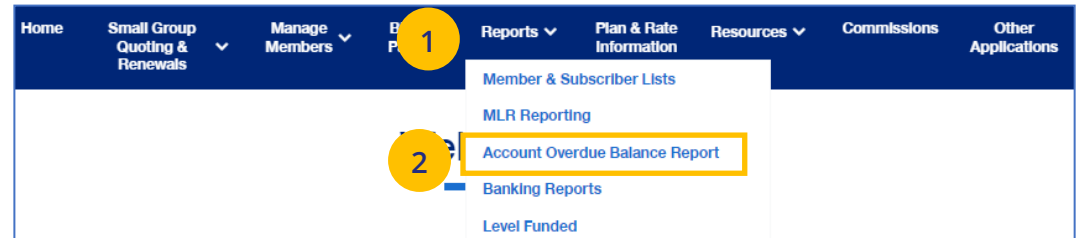


9 | Account Overdue Balance Report

The **Account Overdue Balance Report** shows account balances for a specific date for both late groups and terminated groups.

Note: This report is not available for **UnitedHealthcare HMO** users.

1. Click the **Reports** tab.
2. Select **Account Overdue Balance Report**.
3. Search for and select the Broker using the PCIS ID. The **Account Overdue Balance Report** screen displays.



9 | Account Overdue Balance Report (continued)

To change your search criteria:

- In the **Select the Report Type** field, select either **Late Groups** or **Terminated Groups**.
- In the **Report Date** field, select the report date. **Note:** At this time, you must select the exact date that a report ran on the current UI.
- Click **Apply**.

Note: The system will look for and display the five most recent late groups or terminations reports for each group the broker is associated.

Note: Download Report – To download the report, click **Download Report**. An alert displays on the message icon when the report is ready.

Note: If no reports are available for the group, a message displays.

Account Overdue Balance Report

| [Change Broker](#)

This report will not contain Account Balance information for UnitedHealthcare HMO Groups.

Select the Report Type

Late Groups 4

Report Date

2020-11-03 5

Apply 6

Report for BKS:PCIS ID 119180 as of 2020-11-03

Download

Results (1)

|<
1
>|

Broker Name	Employer Name	Customer No.	Policy No.	Bill Group	Pending Term Date	Total Past Due Balance	Customer Balance	Past Due Aging					Most Recent Payment	Payment Date	Current Past due balance as of 10/10/2021
								0-30 Days	31-60 Days	61-90 Days	91-120 Days	>120 Days			
PROFESSI...	COMPANIO	1258757	220782	1	2021-09-01	\$7,604.75	\$7,604.75	\$0.00	\$7,604.75	\$0.00	\$0.00	\$0.00	\$12,246.97	2021-06-21	\$18,468.24

Account Overdue Balance Report

| [Change Broker](#)

This report will not contain Account Balance information for UnitedHealthcare HMO Groups.

No Termed Group reports available

Select the Report Type

Terminated Groups ▼

Report Date

▼



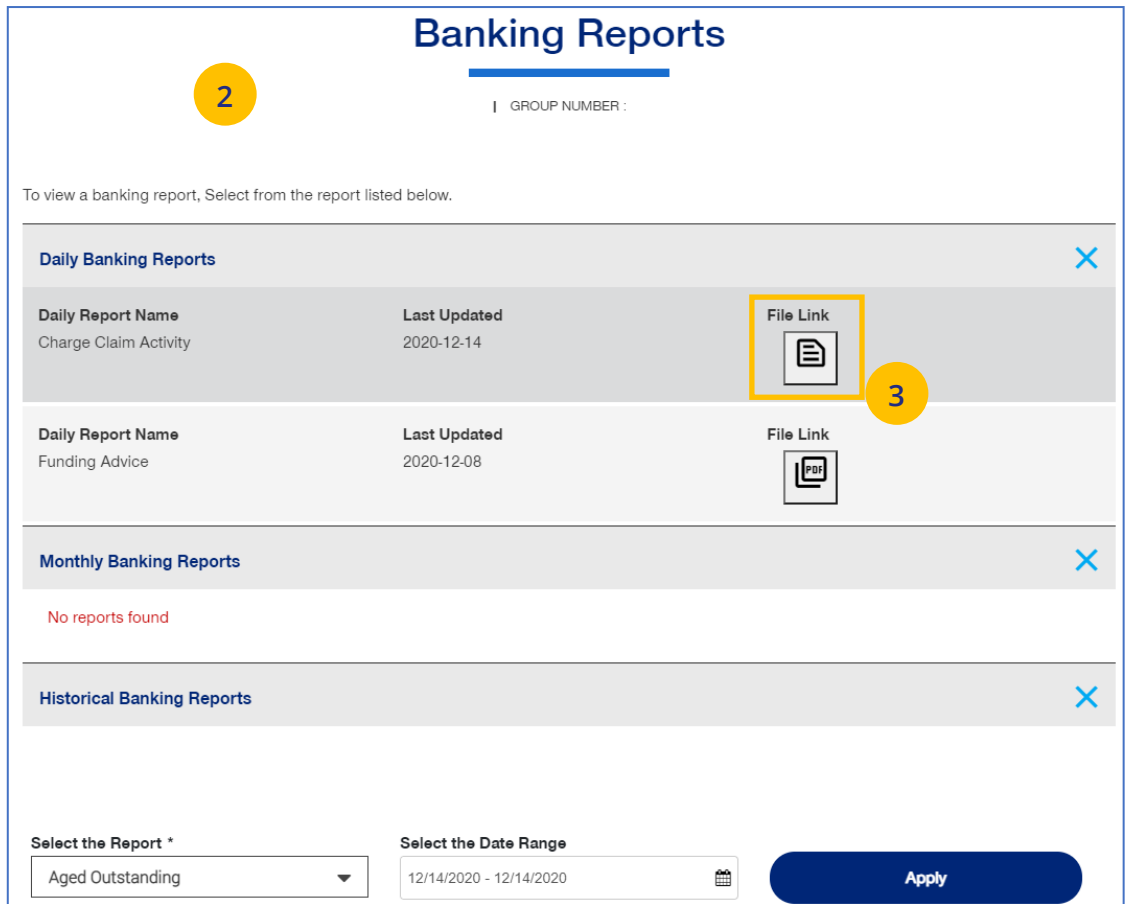
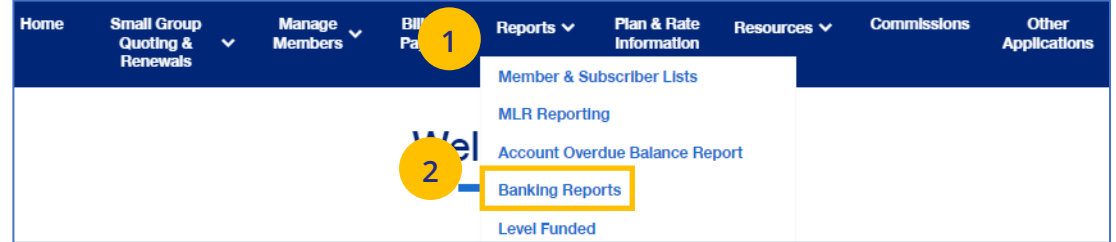
9 | Banking Reports

The **Banking Reports** tab allows you to generate the daily, monthly and historical banking reports for a specific Group.

Note: This report is not available for **UnitedHealthcare HMO** users.

Note: The banking reports are for ASO groups only. The reports will be either a pdf document or an Excel file.

1. Click the **Reports** tab.
2. Select **Banking Reports**. The **Banking Reports** window displays with the Daily, Monthly and Historical Banking reports.
3. Click the specific **File Link** to view the report you need.



Selecting Other Reports

You can generate and view different reports using the dropdown.

1. Select the report you need from the **Select the Report** dropdown list.
2. Select the date range you need in the **Select the Date Range** field.
3. Click **Apply** to display the report.

Note: The monthly executive report will only be available to external users if the group has five or more subscribers

Below is a list of available reports and descriptions.

Report Name	Report Description	Frequency
Notification of Amount of Request (aka Funding Advice)	Reports amount being charged against the customer bank account or request/advise of funding amounts due	Daily
Charged Claim Activity Report	Daily listing of claim charge activity by check/item and member/dependent	Daily
Summary Report for Daily Transfer Evaluation	Displays the claim activities for each bank day in a calendar month	Monthly
Outstanding Report (Section 1 & 2)	Section 1- Lists drafts less than 90 days old that have not cashed; Section 2-Lists members and affected draft items greater than 90 days old that have not cashed	Monthly
Aged Outstanding with Stop Payment Placed	Details in-house stop payments automatically placed on items that remain uncashed 12 months from issuance. <i>The aged items are reported to the customer to include in their unclaimed property filing/escheatment process</i>	Monthly
Issued/Cashed Reconciliation Report	Issued claim payment items vs. cashed items in a policy month	Monthly
Monthly Report of Net Charge Distribution	Displays the charge allocations to the bank account by claim structure	Monthly
Detailed Report for Transfer Evaluation	Details all claim charge items at the member level on a daily basis	Monthly



9 | Level Funded

The **Level Funded** reports show the Monthly Executive Summary, the IRS Documents 6055 and IRS documents 1095 B reports and Reconciliation reports.

Note: The Level Funded reports are not available for **UnitedHealthcare HMO** users.

Note: This report is for Level Funded groups only.

1. Click the **Reports** tab.
2. Select **Level Funded**. The **Level Funded Reports** window displays with the available reports for level Funded groups. Reports include:
 - Monthly Executive Summary
 - IRS Documents 6055
 - IRS Documents 1095 B
 - Reconciliation Reports – Can include **Early Term, Annual** or **Final** report

Note: If specific reports are available, a plus sign is displayed. Click the plus sign (+) to view the reports.

3. Click the specific **File Link** to view the report you need.

The screenshot shows the 'Level Funded Reports' interface. At the top, the 'Reports' tab is selected (callout 1). The 'Level Funded' option is highlighted in the dropdown menu (callout 2). The main content area shows a list of reports for group number 1373. The 'IRS Documents 6055' report is expanded, showing a 'File Link' button (callout 3). The 'Reconciliation Reports' section is also expanded, showing a table with three rows: FINAL, EARLY TERM, and ANNUAL. Each row has a 'File Link' button (callout 3).

Type Of Report	Plan Year Start Date	Last Updated	File Link
FINAL	01/01/2021	05/31/2022	[File Link]
EARLY TERM	01/01/2021	05/31/2022	[File Link]
ANNUAL		05/31/2022	[File Link]



9 | Shared Saving Reports

The **Shared Saving Reports** are in Excel and show claims (summary and detail) for a specific month and year. Historical reports are also available.

Note: The Shared Saving reports are not available for **UnitedHealthcare HMO** users.

Note: This report is for **ASO groups** only.

1. Click the **Reports** tab.
2. Select **Shared Saving Reports**. File links to Monthly and Historical reports are displayed (if available)
3. To generate a monthly report for a specific month and year, enter the search criteria and click **Apply**.
4. Click the specific **File Link** to open the Excel file.

The screenshot shows the 'Reports' dropdown menu with 'Shared Saving Reports' highlighted. Below, the 'Shared Saving Reports' page displays a search form with '2021' and 'January' selected, and an 'Apply' button. A table below shows a report for '01/28/2022' with a 'File Link' icon highlighted.

Monthly Report Name	Report Date	Paid From Date	Paid To Date	File Link
Shared Savings Report	01/28/2022	12/01/2021	12/31/2021	

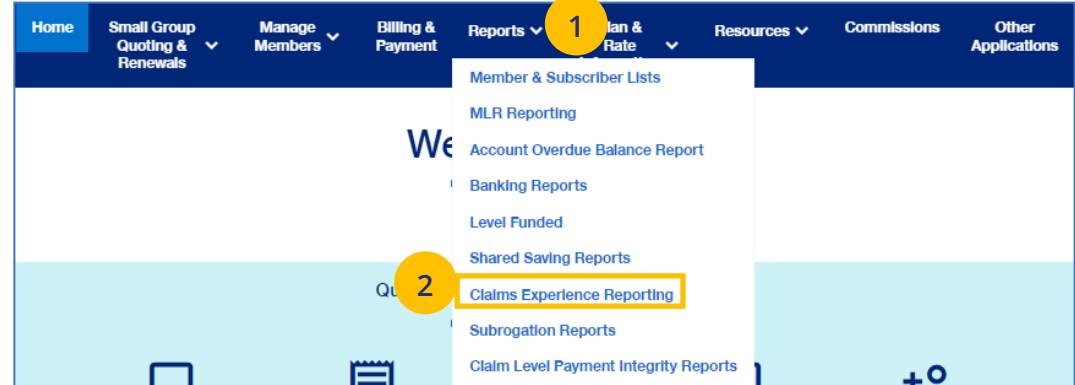


9 | Claims Experience Reporting

Claims Experience Reporting provides access to claim experience reporting used to monitor plan performance through utilization and incurred costs.

Note: The Claims Experience reports are not available for **UnitedHealthcare HMO** users.

1. Click the **Reports** tab.
2. Select **Claims Experience Reporting**. You will be directed to the page used to generate the reports.



9 | Subrogation Reports

The **Subrogation Reports** show information for a specific month and year. Historical reports are also available.



Note: The Subrogation reports are not available for **UnitedHealthcare HMO** users.

Note: This report is for **ASO groups** only.

1. Click the **Reports** tab.
2. Select **Subrogation Reports**. File links to any available reports will be displayed. Click the **File Link** to open the report.

Note: You can generate a new report by selecting a new date range and clicking **Apply**.

The screenshot shows the 'Subrogation Reports' page in a web application. The navigation menu at the top includes 'Home', 'Small Group Quoting & Renewals', 'Manage Members', 'Billing & Payment', 'Reports' (1), 'Plan & Rate', 'Resources', 'Commissions', and 'Other Applications'. The 'Reports' dropdown menu is open, showing options like 'Member & Subscriber Lists', 'MLR Reporting', 'Account Overdue Balance Report', 'Banking Reports', 'Level Funded', 'Shared Saving Reports', 'Claims Experience Reporting', 'Subrogation Reports' (2), and 'Claim Level Payment Integrity Reports'. The main content area is titled 'Subrogation Reports' and includes a 'GROUP NUMBER' field with links for 'View Group Information' and 'Change Group'. Below this, a message states: 'To view a subrogation report, Select from the report listed below.' A table titled 'Monthly Subrogation Reports' is displayed with the following data:

Monthly Report Name	Last Updated	PHI	File Link
Subrogation Report	2021-08-23	No	
Subrogation Report	2021-08-23	Yes	

Below the table, there are filters for 'Select the Report *' (set to 'Subrogation Report') and 'Select the Date Range *' (set to '01/13/2023 - 01/13/2023'), followed by an 'Apply' button.



9 | Claim Level Payment Integrity Reports

The **Claim Level Payment Integrity Reports** are in Excel and detailed information on claims per member.

Note: The Claim Level Payment Integrity reports are not available for **UnitedHealthcare HMO** users.

Note: This report is for **ASO groups** only.

1. Click the **Reports** tab.
2. Select **Claim Level Payment Integrity Reports**.
3. Enter the Year and Month for the report you need.
4. Click **Download Report**. The report will be generated. Click the link to open the file.

The screenshot shows the UnitedHealthcare portal interface. The top navigation bar includes tabs for Home, Small Group Quoting & Renewals, Manage Members, Billing & Payment, Reports (highlighted with a yellow circle 1), Plan & Rate, Resources, Commissions, and Other Applications. A dropdown menu is open under Reports, listing various report types. 'Claim Level Payment Integrity Reports' is highlighted with a yellow box and a yellow circle 2. Below this, the 'Claim Level Payment Integrity Reports' page is shown. It features a title, a 'GROUP NUMBER' field, and links for 'View Group Information' and 'Change Group'. A message states: 'To view a payment integrity report, Select from the report listed below.' Below this message, there are two dropdown menus: 'Select the Year' (set to 2021) and 'Select the Month' (set to August). A yellow box highlights these dropdowns and a 'Download Report' button (highlighted with a yellow circle 4). A yellow circle 3 is placed above the dropdowns.



10 | Plan & Rate Information

The **Plan & Rate Information** tab gives you access to the following:

- Medical, Dental and Vision Rates
- Employer Handbook
- Member Handbook
- Summary Benefit Coverage (SBC)
- View Benefits

To View Plan Information:

1. Click the **Plan & Rate Information** tab.
2. Click **Plan Information**. The **Plan Information** screen will be shown.
3. Click on the specific document link to view the document.

Note: The documents available for **UnitedHealthcare HMO** users are **Summary of Benefit Coverage (SBC)** and **Schedule of Benefits**.

Note: You can also view medical, dental or vision rates (if available) from this screen by clicking the link or links.

Note: Basic Life/AD&D - Contact Broker & Employer Services or your sales representative for copies of Basic Life /AD&D plan documents and rates.

Home Small Group Quoting & Renewals Manage Members Billing & Payment **1** Plan & Rate Information Resources Commissions Other Applications

Plan Information **2** Plan Rates

Welcome

Plan Information

. | GROUP NUMBER [Change Group](#)

For future effective dates, documents will be available on or after plan effective date. If you need a Member or Employer Handbook for Dental or Vision with an effective date of 5/1/21 or later, please contact Client Services for assistance.

Enter partial or full Plan ID/Description to limit results.

FILTER BY

Description Description

Medical

[View Medical Rates >](#)

Plan: 5318360 - FREEDOM HMO 30/50/3500 w/HRA | CT 30/50/3500/100 HMO

Coverage Dates
12/01/2020-11/30/2021

Employer Handbook Member Handbook
Summary Benefit Coverage View Benefits



10 | Plan & Rate Information

To View Medical, Vision and Dental Rates:

- Click the **Plan & Rate Information** tab.
- Click **Plan Rates**. The **Plan Rates** screen will be shown.

Note: You can view Medical, Dental and Vision rates (if available) from this screen by clicking the link or links.

You can view these rates, download a pdf or print the rates.

Plan Rates

Show Rates for Effective Date:

All Dates
 All Dates
 05/01/2021
 01/01/2022

Download PDF | Print All Rates

Medical Plans | Dental Plans | Vision Plans

Rates Effective 01/01/2022

Plan: 12527295 OPTION 3 NY G MTRO GT 25/40/1250/80 EPO 22		Plan: 7755086 OPTION 1 NY G LBTY NG 25/50/100 EPO ZD 22		Plan: 12608209 OPTION 4 NY S MTRO GT 30/80/3500/70 EPO 22	
Employee Tier	Premium / Month	Employee Tier	Premium / Month	Employee Tier	Premium / Month
Employee Only	\$926.58	Employee Only	\$1,157.30	Employee Only	\$770.15
Employee & Spouse	\$1,853.16	Employee & Spouse	\$2,314.60	Employee & Spouse	\$1,540.30
Employee & Child	\$1,575.19	Employee & Child	\$1,967.41	Employee & Child	\$1,309.26
Employee & Family	\$2,640.75	Employee & Family	\$3,298.31	Employee & Family	\$2,194.93



10 | View Benefits

The **View Benefits** link allows you to view benefits for a specific plan.

The benefits are listed in alphabetical order. Click on a letter to go to benefits beginning with that letter.

Note: For **Level Funded** and **Oxford Fully Insured** groups, you will be able to view the detailed benefits of the plan as well as the programs they offer.

Note: This is not available for **UnitedHealthcare HMO** users.

Plan Information

| GROUP NUMBER : [Change Group](#)

For future effective dates, documents will be available on or after plan effective date. If you need a Member or Employer Handbook for Dental or Vision with an effective date of 5/1/21 or later, please contact Client Services for assistance.

Enter partial or full Plan ID/Description to limit results.

FILTER BY

Description

Medical

[View Medical Rates >](#)

Plan: 5318360 - FREEDOM HMO 30/50/3500 w/HRA | CT 30/50/3500/100 HMO

Coverage Dates
12/01/2020-11/30/2021

[Employer Handbook](#) [Member Handbook](#)
[Summary Benefit Coverage](#) [View Benefits](#)



10 | Summary Benefit Coverage

The **Summary Benefits Coverage** link allows you to view the **Summary of Benefits and Coverage** for each plan.

You can filter the report to show only specific plans or all plans.

Home Small Group Quoting & Renewals Manage Members Billing & Payment Reports Plan & Rate Information Resources Commissions Other Applications

Plan & Rate Information

GROUP NUMBER: [Change Group](#)

future effective dates, documents will be available on or after plan effective date. If you need a Member or Employer Handbook for Dental or Vision with an effective date of 5/1/21 or later, please contact Client Services for assistance.

Enter partial or full Plan ID/Description to limit results.

FILTER BY
Description Description

Medical

[View Medical Rates >](#)

Plan: 4810705 - CT FREEDOM 15/30/0/100 ACCESS

Coverage Dates
12/01/2022-11/30/2023

[Employer Handbook](#) [Member Handbook](#)
[Summary Benefit Coverage](#) [View Benefits](#)



10 | Member Handbook

The **Member Handbook** link allows you to view the Member Handbook for each plan.

You can filter the report to show only specific plans or all plans.

Home Small Group Quoting & Renewals Manage Members Billing & Payment Reports Plan & Rate Information Resources Commissions Other Applications

Plan & Rate Information

GROUP NUMBER: [Change Group](#)

future effective dates, documents will be available on or after plan effective date. If you need a Member or Employer Handbook for Dental or Vision with an effective date of 5/1/21 or later, please contact Client Services for assistance.

Enter partial or full Plan ID/Description to limit results.

FILTER BY

Description Description

Medical

[View Medical Rates >](#)

Plan: 4810705 - CT FREEDOM 15/30/0/100 ACCESS

Coverage Dates
12/01/2022-11/30/2023

[Employer Handbook](#) [Member Handbook](#)
[Summary Benefit Coverage](#) [View Benefits](#)



10 | Employer Handbook

The **Employer Handbook** link allows you to view the Employer Handbook for each plan. You can filter the report to show only specific plans or all plans.

Home Small Group Quoting & Renewals Manage Members Billing & Payment Reports Plan & Rate Information Resources Commissions Other Applications

Plan & Rate Information

GROUP NUMBER: [Change Group](#)

future effective dates, documents will be available on or after plan effective date. If you need a Member or Employer Handbook for Dental or Vision with an effective date of 5/1/21 or later, please contact Client Services for assistance.

Enter partial or full Plan ID/Description to limit results.

FILTER BY

Description Description

Medical

[View Medical Rates >](#)

Plan: 4810705 - CT FREEDOM 15/30/0/100 ACCESS

Coverage Dates
12/01/2022-11/30/2023

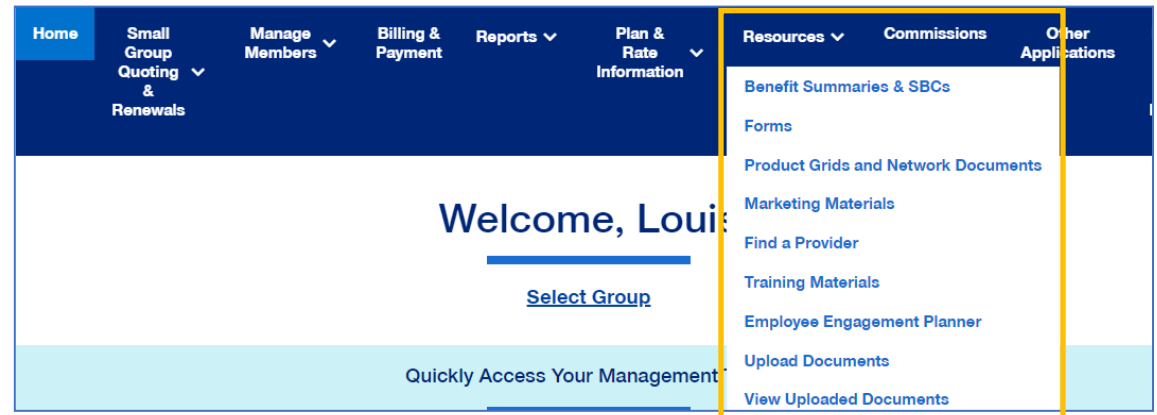
[Employer Handbook](#) [Member Handbook](#)
[Summary Benefit Coverage](#) [View Benefits](#)



11 | Resources

The **Resources** tab provides access to the following:

- **Benefit Summaries & SBC** – Access to Benefit Summary or SBC (Summary of Benefit Coverage) for specific funding type and state
- **Forms** – Forms for employers and employees, including applications, prescription drug lists, HSA forms and claim forms
- **Product Grids and Network Documents** – Access to product grids, network brochures, other documents for medical and specialty across fully insured and level funded plans
- **Marketing Materials** – Information on UnitedHealthcare products and solutions, including behavioral health, pharmacy benefits, incentive and advocacy programs
- **Find a Provider** – Search for a Provider
- **Training Materials** – Resources, including guides, presentations and videos
- **Employee Engagement Planner** – Calendar and communications used to help employees stay engaged throughout the plan year
- **Upload Documents** – Upload specific documents
- **View Uploaded Documents** – Request specific documents for a Group



11 | Benefit Summaries & SBCs

The **Benefit Summaries & SBCs** option allows you to search for and download benefit summaries or the SBC (Summary of Benefit Coverage) by funding type and state.

1. Click the **Benefit Summaries & SBCs** link. The **Benefit Summaries & SBCs** screen displays.
2. Select **Medical & Pharmacy, Dental, Vision** or **STD, LTD, Life**. Medical & Pharmacy is the default.
3. In **Filter Document**, use the drop downs to select funding type and state.

Note: Your drop down selection might require other fields to be entered.

1

Benefit Summaries & SBCs

2

Medical & Pharmacy Dental Vision STD, LTD, Life

To find a Benefit Summary or SBC (Summary of Benefit Coverage) for download, please select from the required fields below. If you don't see your Middle Market Medical and RX plan combination for Benefit Summaries, please try on United eServices.

Filter Documents

Funding Type*

Select a Funding Type

State*

Select a State

Medical Plan Code

Search

Search to Display Results

We're ready to find what you're looking for!

Enter your search criteria in the sidebar to the left, and we'll display the relevant results here for you to browse, download, or print.



11 | Benefit Summaries & SBCs (continued)

3. Click **Search**. The search results will return in the window.
4. Click the specific link to download the document you need.

Medical & Pharmacy [36] De

To find a Benefit Summary or SBC (Summary of Benefits and Coverage) for Middle Market Medical and RX plan combin

Filter Documents

Funding Type*
Fully Insured

Group Size*
 Small Business [2-50]
 Middle Market [51-100]

State*
Alabama

Plan Year*
2021

Medical Plan Code
AU8M

Search 3

Filter Documents

Funding Type*
Level Funded

Product Type*
UnitedHealthcare Level Funded

State*
Alabama

Effective Date*
08/01/2022

Coverage Type*
Family

Your Search Returned 11624 Documents

Enter keyword to filter Results
ex: Plan Code , Plan Description (3 character) [Clear Filter](#) 3

AdvE1000 - RX2	Benefit Summary	SBC
AdvE100021 - RX4 ADV	Benefit Summary	SBC
AdvE100021B - RX4 ADVB	Benefit Summary	SBC
AdvE1000CN - RX2	Benefit Summary	SBC

4



11 | Forms

The **Forms** link provides access to forms for employers and employees, including applications, prescription drug lists, HSA forms and claim forms

1. Click the **Forms** link. The **Forms** screen displays.
2. You can click on the links for (1) **Plans and Networks Documents** or (2) **Marketing Materials for employers**, or (3) select a state to access forms for that state. In addition to State, you can also select a Group Size.

Note: Some categories of documents are organized in accordion folders. Use the right arrow to expand or collapse the accordion.

When you access the forms for the state, you can click the **View PDF** button to display the form.

The screenshot displays the 'Forms' page in a web application. At the top, a dark blue navigation bar contains several menu items: Home, Small Group Quoting & Renewals, Manage Members, Billing & Payment, Reports, Plan & Rate Information, Resources, Commissions, and Other Applications. The 'Forms' link under 'Resources' is highlighted with a yellow box and a '1' in a yellow circle. Below the navigation bar, a white banner area features a 'Welcome, Louis' message and a 'Select Group' button. The main content area is titled 'Forms' and includes a sub-header: 'Get the latest forms for employers and employees, including applications, Prescription Drug Lists (PDLs), HSA forms, claims forms and more.' Below this, there's a section titled 'Looking for Plans and Networks documents or Marketing Materials?' with two links: 'Plans and Networks documents' and 'Marketing Materials for employers', both highlighted with yellow boxes and a '2' in a yellow circle. A search filter section contains three dropdown menus: 'State' (set to 'Select state'), 'Group Size' (set to '2-50'), and 'Language' (set to 'English'). Below the filter, a red message says 'Select a state above to get started.' The main content area shows a list of documents. The first document is 'Installments, Applications, and Enrollments' with ID '9FC68AFE-48BF-429D-BE3A-38A77B48A51F (1).PDF | Alabama | 10+ Full Packet'. The second document is 'CAL | Alabama | 2-50 Full Packet'. Both documents have a 'View PDF' button highlighted with a yellow box and a '2' in a yellow circle.



11 | Product Grids and Networks Documents

The **Product Grids and Networks Documents** link provides access to product grids, network brochures and other documents for medical and specialty plans across fully insured and level funded plans.

1. Click the **Product Grids and Network Documents** link. The **Product Grids and Network Documents** screen displays.
2. You can (1) click the link to view **Benefit Summaries or SBCs** or (2) select a state to access forms for that state. In addition to State, you can also select a Plan Year and Group Size.

Note: Some categories of documents are organized in accordion folders. Use the right arrow to expand or collapse the accordion.

When you access the documents for the state, you can click the **View PDF** button to display the form.

The screenshot shows the user interface for 'Product Grids and Network Documents'. At the top is a navigation bar with various menu items. A dropdown menu is open, showing 'Product Grids and Network Documents' highlighted with a yellow box and a callout '1'. Below the navigation is a 'Welcome, Louis' section with a 'Select Group' button. A light blue bar contains the text 'Quickly Access Your Management'. The main content area is titled 'Product Grids and Network Documents' with a callout '1'. Below the title is a link: 'If you are looking for Benefit Summaries or SBC's click here.' Below this is a form with three dropdown menus: 'Plan Year' (2023), 'State' (Select state), and 'Group Size' (2-50). A red message says 'Select a state above to get started.' Below this is a second form with 'Plan Year' (2022), 'State' (Alabama), and 'Group Size' (2-50). Underneath is a 'Plans' section with the text 'RENPKG | Alabama | 2-50 | 2022' and a 'View PDF' button highlighted with a yellow box and callout '2'.



11 | Marketing Materials

The **Marketing Materials** link Information on UnitedHealthcare products and solutions, including behavioral health, pharmacy benefits, incentive programs and advocacy programs.

1. Click the **Marketing Materials** link. The **Marketing Materials** screen displays.
2. You can (1) access the Employee Engagement Planner by clicking the link or (2) select a state to access marketing materials for that state.

When you access the marketing materials for the state, you can click the **View** or **View PDF** button to display the document.

Home Small Group Quoting & Renewals Manage Members Billing & Payment Reports Plan & Rate Information Resources Commissions Other Applications

Welcome, Louis

Select Group

Marketing Materials

Get up-to-date information on the most valuable UnitedHealthcare products and solutions, including behavioral health, pharmacy benefits, incentive programs, advocacy programs and more.

Looking for member documents to share with employees? Visit the Employee Engagement Planner

The Employee Engagement Planner has helpful materials to share directly with members at the right time during the plan year, helping maximize employee engagement.

Visit the Employee Engagement Planner

State Language

Select state English

Select a state above to get started.

Member Experience

If you're looking for documents to share with members, visit Employee Engagement Planner

DOCNM0001 | Alabama View

DOCNM0001 | Select markets View

Experience | Material View PDF

TestMixedCase | Alabama View PDF



11 | Find a Provider

The **Find a Provider** tab allows you to search for a provider for a specific plan.

Note: The screens will vary based on your selection:

- **Oxford & Oxford Level Funded**
- **UnitedHealthcare Level Funded**
- **UnitedHealthcare HMO**
- **UnitedHealthcare Freedom Plans**
- **UnitedHealthcare Fully Insured**
- **United Behavioral Health, or**
- **Prescription Drug Lists.**

Find a Provider: Oxford and Oxford Level Funded

1. Click **Find a Provider**. The **Provider Search** screen displays.
2. Click **Oxford & Oxford Level Funded**.
3. Select the Oxford plan you are looking for.

Home Small Group Quoting & Renewals Manage Members Billing & Payment Reports Plan & Rate Information Resources Commissions Other Applications

Benefit Summaries & SBCs
Forms
Product Grids and Network Documents
Marketing Materials
Find a Provider 1
Training Materials
Employee Engagement Planner

Welcome, Louis
[Select Group](#)

Provider Search

- United Healthcare Oxford 2
Oxford & Oxford Level Funded
- United Healthcare
UnitedHealthcare Level Funded
- United Healthcare
UnitedHealthcare HMO
- United Healthcare
United Healthcare Freedom Plans
- United Healthcare
UnitedHealthcare Fully Insured
- United Healthcare
United Behavioral Health
- United Healthcare
Prescription Drug Lists

What Oxford plan are you looking for?
You can find your plan name on the front of your member ID card in the bottom right corner.

Metro 3

Freedom



11 | Find a Provider (continued)

4. Enter the location of your provider and click Continue.
5. Enter the type of provider and click Search. A list of providers will be shown. You can filter the results if needed.

What location do you want to find a provider in?

Enter a street address, city & state or 5 digit zip code.

4

[CONTINUE](#)

What type of **Medical Care** can we help you find near:

Birmingham, AL
[CHANGE LOCATION](#)

5

[SEARCH](#)

CHOICE PLUS CHANGE PLAN >

[←](#) Results for **All Primary Care Providers** 5 [NEW SEARCH](#)
Office Visit - Primary Doctor - Established Patient - Low Complexity [VIEW MAP](#)
Total average cost in your area: \$44 - \$69


[✓](#) 1357 **In-Network Providers** Found Near 35203 [Reset Results](#) SORT RESULTS BY: [PREFERRED PROVIDERS](#)

[FILTER](#)

Refine Results
Changing a search results filter will reload the page immediately.

LOCATION [-](#)

WHERE
Birmingham, AL

 **Crenshaw, James H, MD**
Internal Medicine

With the spread of COVID-19, please call your provider's office before you go to confirm their availability, location, service options—including telemedicine—and any precautions you should take.

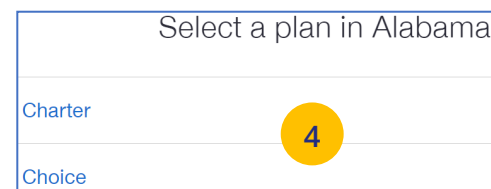
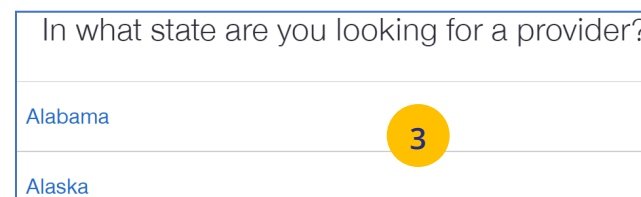
Any cost information on this page is an estimate only. See more information below about participating providers, available services and these estimates.



11 | Find a Provider (continued)

Find A Provider: Level Funded

1. Select **Find a Provider**.
2. Click **UnitedHealthcare Level Funded**.
3. Select the state where your provider resides.
4. Select a plan in the specific state.



11 | Find a Provider (continued)

5. Enter the location of your provider and click Continue.
6. Enter the type of provider and click Search. A list of providers will be shown. You can filter the results if needed.

What location do you want to find a provider in?

Enter a street address, city & state or 5 digit zip code.

5

[CONTINUE](#)

What type of **Medical Care** can we help you find near:

Birmingham, AL
[CHANGE LOCATION](#)

6

Search by provider, service, or condition [SEARCH](#)

CHOICE PLUS CHANGE PLAN >

[←](#) Results for **All Primary Care Providers** 6 [NEW SEARCH](#)
Office Visit - Primary Doctor - Established Patient - Low Complexity [VIEW MAP](#)
Total average cost in your area: \$44 - \$69


✓ 1357 **In-Network Providers** Found Near 35203 [Reset Results](#) SORT RESULTS BY: [PREFERRED PROVIDERS](#)

Filter Results by Provider Name [FILTER](#)

Refine Results
Changing a search results filter will reload the page immediately.

LOCATION [-](#)

WHERE
Birmingham, AL

 **Crenshaw, James H, MD**
Internal Medicine

With the spread of COVID-19, please call your provider's office before you go to confirm their availability, location, service options—including telemedicine—and any precautions you should take.

Any cost information on this page is an estimate only. See more information below about participating providers, available services and these estimates.



11 | Find a Provider (continued)

Find A Provider: UnitedHealthcare HMO

1. Select **Find a Provider**.
2. Click **UnitedHealthcare HMO**.
3. Select the state where your provider resides.
4. Select a network in the state you selected.

The screenshot shows the navigation path for finding a provider. It starts with a menu where 'Find a Provider' is highlighted with a yellow box and a yellow circle containing the number 1. Below this is the 'Provider Search' screen, which features three network options: 'Oxford & Oxford Level Funded', 'UnitedHealthcare Level Funded', and 'UnitedHealthcare HMO'. The 'UnitedHealthcare HMO' option is highlighted with a yellow box and a yellow circle containing the number 2. Below the network options is a section titled 'To search for doctors, clinics or facilities, choose the state where you live'. It includes a yellow circle with the number 3 and four state icons: California, Oklahoma, Oregon, and Washington. The California icon is highlighted with a yellow box. Below this is a section titled 'Select a network in California', which includes a yellow circle with the number 4 and two network options: 'SignatureValue Advantage HMO' and 'SignatureValue Alliance HMO'. The 'SignatureValue Advantage HMO' option is highlighted with a yellow box.

12 | Find a Provider (continued)



Enter a zip code or city in California to refine your provider search

5. Enter the location of your provider and click **Continue**. A **Primary Care Provider Information** screen displays. Click **Continue** again.
6. Enter the type of provider and click **Search**. A list of providers will be shown. You can filter the results if needed.

5

What type of **Medical Care** can we help you find near:

Los Angeles, CA
[CHANGE LOCATION](#)

Search by provider, service, or condition **6**

CHOICE PLUS CHANGE PLAN >

[←](#) Results for **All Primary Care Providers** **6** [NEW SEARCH](#)
 Office Visit - Primary Doctor - Established Patient - Low Complexity
 Total average cost in your area: \$44 - \$69 [VIEW MAP](#)


1357 **In-Network Providers** Found Near 35203 [Reset Results](#) SORT RESULTS BY:

Filter Results by Provider Name

Refine Results
 Changing a search results filter will reload the page immediately.

LOCATION

WHERE
 Birmingham, AL

 **Crenshaw, James H, MD**
 Internal Medicine

With the spread of COVID-19, please call your provider's office before you go to confirm their availability, location, service options—including telemedicine—and any precautions you should take.

Any cost information on this page is an estimate only. See more information below about participating providers, available services and these estimates.



11 | Find a Provider (continued)

Find A Provider: UnitedHealthcare Freedom Plans

1. Select **Find a Provider**.
2. Click **UnitedHealthcare Freedom Plans**.
3. Select the plan you need.

The screenshot shows a navigation menu with 'Resources' and 'Commissions' tabs. Under 'Resources', there are links for 'Benefit Summaries & SBCs', 'Forms', 'Product Grids and Network Documents', and 'Marketing Materials'. The 'Find a Provider' link is highlighted with a yellow box and a '1' in a yellow circle.

The 'Provider Search' section displays six plan options, each with the UnitedHealthcare logo and a name: 'Oxford & Oxford Level Funded', 'UnitedHealthcare Level Funded', 'UnitedHealthcare HMO', 'United Healthcare Freedom Plans', 'UnitedHealthcare Fully Insured', and 'United Behavioral Health'. The 'United Healthcare Freedom Plans' option is highlighted with a yellow box and a '2' in a yellow circle.

The 'What plan are you looking for?' section contains the text: 'You will find your plan name on the bottom-right corner of your member ID card.' Below this are three options: 'Individual and Family State Exchanges', 'All Savers Health Plans', and 'Charter / Charter Balanced'. The 'All Savers Health Plans' option is highlighted with a yellow box and a '3' in a yellow circle.



11 | Find a Provider (continued)

4. Select **Individual and Family** or **SHOP (Small Business Health Plan Options Program)**.
5. Select the specific state you need.
6. Select the network in your state.

Which type of Health Insurance Marketplace?

This website is not the Health Insurance Marketplace website. This website is designed to provide you with resources to help you find network providers.



Individual and Family
Choose this for yourself or your dependents



SHOP (Small Business Health Options Program)
Choose this for your business



In which state do you live?

Arizona 

Maryland

Massachusetts

Select a network in Arizona

AZ Compass HMO  

AZ Compass HMO



11 | Find a Provider (continued)

7. Enter the location of your provider and click **Continue**. A **Primary Care Provider Information** screen displays. Click **Continue** again.
8. Enter the provider search criteria and click **Search**. A list of providers will be shown. You can filter the results if needed.

What location do you want to find a provider in?

Enter a street address, city & state or 5 digit zip code.

Street Address, City & State, Zip Code

Continue

What type of **Medical Care** can we help you find near:

Los Angeles, CA
CHANGE LOCATION

Search by provider, service, or condition

SEARCH

Search Results

Search by provider, service, or condition

Search

Refine Results

Changing a search results filter will reload the page immediately.

37 Results for 'primary health, primary health care' Near 85004

All Results (37)

Health Care Professionals (6)

Clinics and Facilities (27)

Federally Qualified **Health Center** (FQHC)
Specialty

With the spread of COVID-19, please call your provider's office before you go to confirm their availability, location, services including telemedicine—and any precautions you should take.



11 | Find a Provider (continued)

Find A Provider: UnitedHealthcare Fully Insured

1. Select **Find a Provider**.
2. Click **UnitedHealthcare Fully Insured**.
3. Select whether you are a UHC member just viewing UHC plan options.
4. Select the plan you need.

The screenshot shows the top navigation bar with 'Resources' and 'Commiss'. Below is a list of menu items: 'Benefit Summaries & SBCs', 'Forms', 'Product Grids and Network', and 'Marketing Materials'. The 'Find a Provider' item is highlighted with a yellow box and a yellow circle containing the number 1.

The section is titled 'Are you a current UHC member or are you shopping for a health plan?'. It features two circular icons: a medical cross icon labeled 'UHC Member' with the subtext 'You have UnitedHealthcare', and a shopping cart icon labeled 'Shopping Around' with the subtext 'View your UHC plan options'. A yellow circle with the number 3 is positioned between the two icons.

The section is titled 'What plan are you looking for?'. Below the title is the text: 'You will find your plan name on the bottom-right corner of your member ID card.' There are three options listed: 'Individual and Family State Exchanges', 'All Savers Health Plans', and 'Charter / Charter Balanced'. A yellow circle with the number 4 is positioned next to 'All Savers Health Plans'.



11 | Find a Provider (continued)

5. Enter the location of your provider and click **Continue**. A **Primary Care Provider Information** screen displays. Click **Continue** again.
6. Enter the provider search criteria and click **Search**. A list of providers will be shown You can filter the results if needed.

What location do you want to find a provider in?

Enter a street address, city & state or 5 digit zip code.

Street Address, City & State, Zip Code

Continue

What type of **Medical Care** can we help you find near:

Los Angeles, CA
CHANGE LOCATION

Search by provider, service, or condition

SEARCH

Search Results

Search by provider, service, or condition

Search

Refine Results

Changing a search results filter will reload the page immediately.

All Results (37)

Health Care Professionals (6)

Clinics and Facilities (27)

37 Results for 'primary health, primary health care' Near 85004

With the spread of COVID-19, please call your provider's office before you go to confirm their availability, location, service including telemedicine—and any precautions you should take.

Federally Qualified **Health Center (FQHC)**
Specialty



11 | Find a Provider (continued)

Find A Provider: United Behavioral Health

1. Select **Find a Provider**.
2. Click **United Behavioral Health**.
3. Enter the search criteria and click Search. The list of providers will be shown.

The screenshot displays the United Behavioral Health Provider Search interface. At the top, there is a navigation bar with 'Resources' and 'Commissions' tabs. A dropdown menu is open under 'Resources', with 'Find a Provider' highlighted and circled in yellow with a '1'. The main content area shows a grid of United Healthcare logos, with 'United Behavioral Health' circled in yellow with a '2'. Below this is a large blue banner titled 'Find a Provider' with the text 'Find therapists, psychiatrists, or other clinics in your network.' A search bar contains 'Eden Prairie, MN 55344' and a 'Search' button, with a '3' circled in yellow. Below the banner, the search results page shows a search bar, a 'Refine Results' sidebar, and a list of providers. The first provider, Leah Willett, is circled in yellow with a '3'. The second provider, Melanie Vankuiken, is also visible.



11 | Find a Provider (continued)

Find A Provider: Prescription Drug Lists

1. Select **Find a Provider**.
2. Click **Prescription Drug Lists**.
3. Click the specific link to display the drug list you need.

The screenshot shows a website interface with a navigation menu on the left and a main content area. The navigation menu includes 'Resources', 'Commissioner', 'Benefit Summaries & SBCs', 'Forms', 'Product Grids and Network Documents', 'Marketing Materials', and 'Find a Provider'. The 'Find a Provider' link is highlighted with a yellow box and a yellow circle containing the number '1'. The main content area is titled 'Provider Search' and displays a grid of United Healthcare logos for various plans: 'Oxford & Oxford Level Funded', 'UnitedHealthcare Level Funded', 'UnitedHealthcare HMO', 'United Healthcare Freedom Plans', 'UnitedHealthcare Fully Insured', and 'United Behavioral Health'. The 'Prescription Drug Lists' link is highlighted with a yellow box and a yellow circle containing the number '2'. Below this, there is a section titled 'Prescription Drug Lists' with a sub-header 'Check your PDL to stay updated on your pharmacy coverage'. This section includes a paragraph explaining PDLs, a 'Sign in to view the PDL for your plan' button with a dropdown menu for 'Select your plan to sign in', and three sub-sections: 'Health Insurance Marketplace and Small and Large Group plans', 'Individual and SHOP Marketplace Drug Lists (On-Exchange)', and 'Small Group and Large Group Drug Lists (Off-Exchange)'. The 'Prescription Drug Lists' link in the 'Small Group and Large Group Drug Lists (Off-Exchange)' section is highlighted with a yellow circle containing the number '3'.



11 | Training Materials

The **Training Materials** link allows you to access training resources, including guides, presentations and videos.

1. Click the **Training Materials** link. The **Training Materials** screen displays.
2. Enter the search criteria to display links to the materials you need.

The screenshot shows the application's navigation bar with the following items: Home, Small Group Quoting & Renewals, Manage Members, Billing & Payment, Reports, Plan & Rate Information, Resources, Commissions, and Other Applications. The Resources dropdown menu is open, showing options like Benefit Summaries & SBCs, Forms, Product Grids and Network Documents, Marketing Materials, Find a Provider, Training Materials (highlighted with a yellow box and a '1' in a yellow circle), and Employee Engagement Planner.

The main content area features a 'Welcome, Louis' message with a 'Select Group' button. Below this is a 'Training Materials' section with a '1' in a yellow circle. A text box below the title reads: 'Find resources to assist you in utilizing uhceservices, SAMx and SAMx - Level Funded, including guides, presentations, and videos.'

Below the text box is a filter section with four dropdown menus: 'Select a Brand' (Please Select), 'Select a State' (Please Select), 'Select a Product Type' (Please Select), and 'Select a Group Size' (Please Select). A yellow box highlights these filters, with a '2' in a yellow circle next to the 'Select a Product Type' dropdown.

Below the filter section is a red text prompt: 'Select filters above to get started.'

A second screenshot shows the filter section with the following selections: 'Select a Brand' (UnitedHealthcare), 'Select a State' (Alabama), 'Select a Product Type' (Medical), and 'Select a Group Size' (2-50). A '2' in a yellow circle is next to the 'Select a Product Type' dropdown.

Below the filter section is a 'Training Internal' section with two items: 'SAMx' and 'uhceservices.com', each with a dropdown arrow.

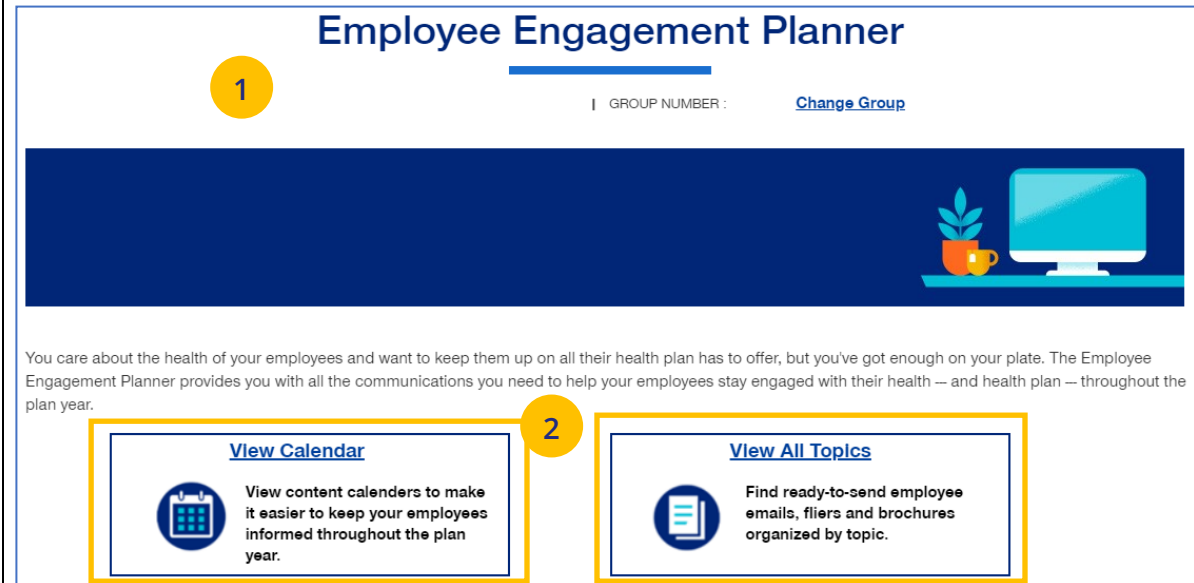
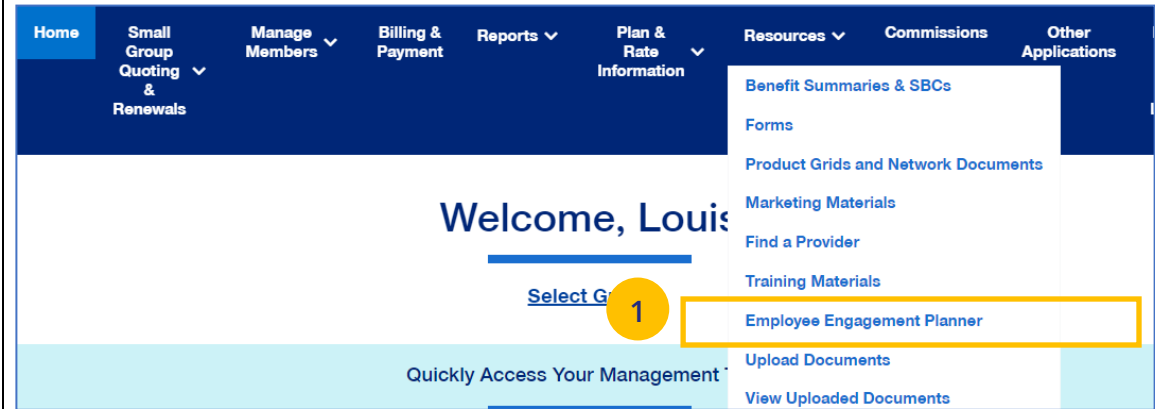


11 | Employee Engagement Planner

The **Employee Engagement Planner** allows you to view a calendar and documents that can be sent to employees to keep them informed.

Note: The **Employee Engagement Planner** is not used by **UnitedHealthcare HMO** users.

5. Click the **Employee Engagement Planner** tab. The **Employee Engagement Planner** screen displays.
6. Click **View Calendar** or **View All Topics**.



11 | Employee Engagement Planner (continued)

3. **View Calendar** – Select a group to see documents based on group brand and effective date. Important communications that can be downloaded and sent to employees.

The screenshot shows the 'Calendar' interface for 'MILESTONES BEHAVIORAL SERVICES INC.' with group number '1046476'. The calendar is for 'June 2021' and displays several events:

- UHC Welcome Brochure (June 2-5)
- UHC Premium Designation (June 8-12)
- UHC myUHC.com (June 14-19)
- UHC Optum RX (June 21-26)
- UHC Cost of Care (June 28-30)

The interface includes a left sidebar for 'Add New Calendar' with filters for 'Select Brand' (UnitedHealthcare, Oxford, UnitedHealthcare Level) and 'Select Effective Date'. The main calendar grid shows days of the week and dates, with events represented by blue bars across the relevant dates.



11 | Employee Engagement Planner (continued)

4. **View All Topics** - Links to topics that can be shared with employees.

When you click on a topic, you will see filters that allow you to download topics in different formats (brochure, email, flier) when available.

View All Topics 4

Select the topic you're interested in to find communications to share with employees.

 **Before the Plan Begins**

- Waiting for Coverage to Start
- Getting Started Checklist

 **Help Employees Understand Their Plan**

- Health and wellness programs
- Ways to access care
- Ways to lower costs
- ER Redirection

 **Welcome Employees**

- Welcome Brochure
- Premium Designation Program
- OptumRx®

 **Seasonal Reminders**

- Flu Shots
- Annual Checkups

View All Topics Category

Filter Options

Category Type

Brochure

Email

Flier

Select All

Product Brand

UnitedHealthcare

Oxford

UnitedHealthcare Level Funded

States

Connecticut

New York

New Jersey

Select All

Before the Plan Begins

UHC New Member Checklist

5 steps for your employees to take after getting their health plan ID card.

Choose a Communication Type:

4

UHC Waiting For Coverage to Start

Actions your employees can take before their health plans begin.

Choose a Communication Type:

Oxford New Member Checklist

5 steps for your employees to take after getting their health plan ID card.

Choose a Communication Type:

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126

11 | Upload Documents

The **Upload Documents** tab allows you to select and upload a specific document. **This only applies if you have permission to upload documents.**

Note: Access to **Upload Documents** is available only to users with the following roles:

- Employer Lead
- Employer User
- Broker Lead with User Maintenance
- Standard Broker without Commissions
- Broker View Only
- Standard Broker with Commissions

Note: If you have not entered a Group Number previously, you will be asked to search for and find your Group prior to requesting the document.

1. Click the **Upload Documents** link. The **Upload Documents** screen displays.

The screenshot shows the top navigation bar with the following items: Home, Small Group Quoting & Renewals, Manage Members, Billing & Payment, Reports, Plan & Rate Information, Resources, Commissions, and Other Applications. The 'Resources' dropdown menu is open, showing options: Benefit Summaries & SBCs, Forms, Product Grids and Network Documents, Marketing Materials, Find a Provider, Training Materials, Employee Engagement Planner, **Upload Documents** (highlighted with a yellow box), and View Uploaded Documents. A yellow circle with the number '1' is placed over the 'Upload Documents' link. Below the navigation bar, the main content area displays 'Welcome, Louis' and a 'Select Group' button. A light blue banner at the bottom of the dashboard says 'Quickly Access Your Management'.

The screenshot shows the 'Upload Documents' screen. At the top, there is a yellow circle with the number '1' next to the 'Upload Documents' title. Below the title, there is a 'GROUP NUMBER' field and a 'Change Group' link. A message reads: 'Please select a document name and browse your computer for your file. You may upload five documents at a time.' Below this message, there are two input fields: 'Document Name *' with a dropdown menu showing 'Select One', and 'Select Document for Upload *' with a file selection button showing 'No file chosen...'. At the bottom right, there is an 'Add Row +' button. At the bottom center, there are two buttons: 'Clear Selections' and 'Upload'. At the bottom, there is a link 'here' with an external link icon, and a note: 'If you have recently submitted information, please allow up to 5 business days for us to process your information and update your status.'



11 | Upload Documents (continued)

2. Use the **Document Name** drop-down to select the document you need to upload.
3. Click the **Select Document for Upload** box and attach the document for upload. Repeat this if needed by clicking **Add Row**. You can upload up to five documents at one time.
4. Click **Upload**. A “successfully uploaded” confirmation message will display.

Document Name * **Select One** ▼

- Select One
- Annual Certification
- Binder Check Payments and Paper Group Submission
- Common Law Employee Attestation
- Common Ownership Certification Form
- Employer Information Form**
- Healthy NY Recertification
- Miscellaneous
- Professional Employer Association Certification Form

Document Name * 1099 Attestation Form ▼

Select Document for Upload * Decision 2.jpg

Add Row +

Document Name * 1099 Attestation Form ▼

Select Document for Upload * Decision 2.jpg

Add Row +

Clear Selections **Upload**

Document Name * 1099 Attestation Form ▼

Select Document for Upload * Decision 2.jpg

4 Document **Decision 2.jpg** successfully uploaded as 1099 ATTESTATION FORM. Document ID: **0902b2da80189d0c**



11 | View Uploaded Documents

The **View Uploaded Documents** tab allows you to access documents that have been uploaded.

Note: If you have not entered a Group Number previously, you will be asked to search for and find your Group prior to requesting documents.

1. Click the **View Uploaded Documents** link. The **View Uploaded Documents** screen displays.
2. Click **Apply**. The report or reports that meet your search criteria will be shown at the bottom of the screen, including the name of who uploaded the documents.

Note: To change your search criteria, enter the **Document Name**, **Date Range** and/or **Group ID**. Click **Apply**. For **Date Range**, you cannot select more than 60 days in the past from current date.

3. Click **Download**. A message displays telling you the download was successful.

Note: If you click **Download** in one of the sections that contains a report, a pdf will be generated.

The screenshot shows the 'View Uploaded Documents' page. At the top, a navigation menu includes 'Home', 'Small Group Quoting & Renewals', 'Manage Members', 'Billing & Payment', 'Reports', 'Plan & Rate Information', 'Resources', 'Commissions', and 'Other Applications'. The 'Resources' dropdown is open, showing options like 'Benefit Summaries & SBCs', 'Forms', 'Product Grids and Network Documents', 'Marketing Materials', 'Find a Provider', 'Training Materials', 'Employee Engagement Planner', 'Upload Documents', and 'View Uploaded Documents' (highlighted with a yellow box and callout 1). Below the navigation, a 'Welcome, Louis' message is displayed with a 'Select Group' link. A 'Quickly Access Your Management' section contains a 'View Uploaded Documents' link (also highlighted with a yellow box and callout 1). The main content area is titled 'View Uploaded Documents' and features search filters: 'Select the Document Name' (set to 'All'), 'Select the Date Range' (04/21/2022 - 04/22/2022), and 'Enter the Group ID' (Group ID). A yellow box and callout 2 highlight the 'Apply' button. Below the filters is a table with two rows of document data. The first row has 'MISCELLANEOUS' as the document name, and the second row has 'WAGE AND TAX FORM'. A yellow box and callout 3 highlight the 'Download' button for the 'MISCELLANEOUS' document. At the bottom, a 'Download Report' button is shown, and a green message states: 'Your request to download the report is successful. You will be notified in the Message Center when your report is complete.'



12 | Commissions

The **Commissions** tab is used to search for and display a broker's commissions.

1. Click the **Commissions** tab. The **Commissions** screen displays.
2. You have the following options:
 - You can display a specific statement by clicking the corresponding pdf link to download it. Then click on it to open it.
 - You can also download to an Excel file.
 - You can use the filters to bring up statements that meet your specific search criteria. You can search by **Business Segment** and/or **From Date** and **To Date**.

Note: For **UnitedHealthcare HMO** users, the commissions statement prefix will be "UHCOFCA."



14 | Other Applications

The **Other Applications** tab provides direct links to United eServices (UeS) and Employer eServices (EeS).

Home Small Group Quoting & Renewals Manage Members Billing & Payment Reports Plan & Rate Information Resources Commissions **Other Applications**

Other Applications

1

United eServices (UeS)

Market
Alabama, Alaska, Arizona, Arkansas, California, Colorado, Connecticut, Delaware, Florida, Georgia, Hawaii, Idaho, Illinois, Indiana, Iowa, Kansas, Kentucky, Louisiana, Maine, Maryland, Massachusetts, Michigan, Minnesota, Mississippi, Missouri, Montana, Nebraska, Nevada, New Hampshire, New Jersey, New Mexico, New York, North Carolina, North Dakota, Ohio, Oklahoma, Oregon, Pennsylvania, Rhode Island, South Carolina, South Dakota, Tennessee, Texas, Utah, Vermont, Virginia, Washington, West Virginia, Wisconsin, Wyoming

Carrier
UnitedHealthcare

Funding Type
Fully Insured

Product
Basic Life, Dental, Long Term Disability(LTD), Medical, Short Term Disability(STD), Vision

Functionality
EEMS, Facets Commission Statements, Franchise Quoting (ACEC, AHP), Quoting, Renewal Packages, SAM

[Go to United eServices](#)



Appendix: Broker Roles and Permissions

Broker Roles and Permissions													
Function	Broker Lead with User Maintenance	Standard Broker with Commissions	Standard Broker without Commissions	Broker View Only	Broker Content Only	Baseline Broker with Quote, Renewal, Commissions	Baseline Broker with Quote and Commissions	Baseline Broker with Quote	Baseline Broker with Renewal and Commissions	Baseline Broker with Renewal	Baseline Broker with Commissions	Baseline Broker with Quote and Renewal	Standard Broker No Commissions or Notices
Invite Broker users	Y	N	N	N	N	N	N	N	N	N	N	N	N
Invite a Broker user as a Lead or assign an existing Broker as Lead	Y	N	N	N	N	N	N	N	N	N	N	N	N
View and update a Broker user's profile	Y	N	N	N	N	N	N	N	N	N	N	N	N
Disable a Broker user's account	Y	N	N	N	N	N	N	N	N	N	N	N	N
View Subscriber and Member lists	Y	Y	Y	Y	N	N	N	N	N	N	N	N	Y
View plan documents and benefits for an Employer group	Y	Y	Y	Y	N	N	N	N	N	N	N	N	Y
Invite Employer users	N	N	N	N	N	N	N	N	N	N	N	N	N
View and update an Employer user's profile	N	N	N	N	N	N	N	N	N	N	N	N	N
Disable an Employer user's	N	N	N	N	N	N	N	N	N	N	N	N	N
Invite an Employer user as a Lead, or assign an existing Employer user as a Lead	N	N	N	N	N	N	N	N	N	N	N	N	N
View existing members within an Employer group	Y	Y	Y	Y	N	N	N	N	N	N	N	N	Y
View eligibility	Y	Y	Y										
Enroll new members within an Employer group	Y	Y	Y	N	N	N	N	N	N	N	N	N	Y
Update existing members within an Employer group	Y	Y	Y	N	N	N	N	N	N	N	N	N	Y
Terminate existing members within an Employer group	Y	Y	Y	N	N	N	N	N	N	N	N	N	Y
Print or order a member's ID Card	Y	Y	Y	Y	N	N	N	N	N	N	N	N	Y
Quote new business (UeS, Project X, All Savers, Quick Renewals and Renewal	Y	Y	Y	Y	N	Y	Y	Y	N	N	N	Y	Y
View Commissions page	Y	Y	N	Y	N	Y	Y	N	Y	N	Y	N	Y
View MLR reports	Y	Y	Y	Y	N	Y	Y	Y	Y	Y	Y	Y	Y
Access to the Billing and Payment page and ability to view	Y	Y	Y	Y	N	N	N	N	N	N	N	N	Y
View Member and Employee Handbooks	Y	Y	Y	Y	N	Y	Y	Y	Y	Y	Y	Y	Y
Renew existing business, view renewal packages for Employer groups with upcoming renewals	Y	Y	Y	Y	N	Y	N	N	Y	Y	N	Y	Y
Upload a document via the Upload Document screen	Y	Y	Y	Y	Y	N	N	N	N	N	N	N	Y
View Banking Report	Y	Y	Y	Y	Y	N	N	N	N	N	N	N	Y
View Account Overdue Balance Report	Y	Y	Y	Y	Y	N	N	N	N	N	N	N	N
View Level Funded Report	Y	Y	Y	Y	Y	N	N	N	N	N	N	N	Y
View Payment Integrity Report	Y	Y	N	N	N	N	N	N	N	N	N	N	Y
View Claims Experience	Y	Y	Y	Y	N	N	N	N	N	N	N	N	Y
Delinquent Employer Accounts	Y	Y	Y	Y	N	N	N	N	N	N	N	N	N



Appendix: Employer Roles and Permissions

Employer Roles and Permissions							
Function	Employer Lead	Employer User	Employer With Eligibility and Reporting	Employer With Eligibility	Employer With Billing	Employer With Reporting	Employer Member Management Only
Invite employer users	Y	N	N	N	N	N	N
Invite an employer user as a Lead or assign an existing employer as Lead	Y	N	N	N	N	N	N
Create, view, update and disable an employer user's profile	Y	N	N	N	N	N	N
View Member and Subscriber lists	Y	Y	Y	Y	Y	Y	Y
View plan documents and benefits for an employer group	Y	Y	Y	Y	N	Y	Y
View members within an Employer group	Y	Y	Y	Y	N	Y	Y
Enroll members within an Employer group	Y	Y	N	N	N	N	Y
Update members within an Employer group	Y	Y	N	N	N	N	Y
Terminate members within an Employer group	Y	Y	N	N	N	N	Y
Print or order a Member's ID Card	Y	Y	N	N	N	N	Y
Quote new business (UeS, Project X, All Savers, Quick Quote)	Y	Y	Y	Y	Y	Y	Y
View Commissions page	Y	Y	Y	Y	Y	Y	Y
View MLR reports	N	N	N	N	N	Y	Y
Access to the Billing and Payment page and ability to view bills	Y	Y	N	N	Y	Y	Y
View Member Handbook	Y	Y	N	N	N	N	N
View Employer Handbook	Y	Y	N	N	N	N	N
View renewal packages for Employer groups with upcoming renewals	Y	N	N	N	N	N	N
Renew existing business	N	N	N	N	N	N	N
Upload a document via the Upload Document screen	Y	Y	N	N	N	N	N
View Banking Report	Y	Y	Y	N	Y	Y	N
View Account Overdue Balance Report	N	N	Y	N	Y	Y	N
View Level Funded Report	Y	Y	Y	N	N	Y	N
View Payment Integrity Report	Y	Y	Y	N	N	Y	N
View Claims Experience Report	Y	Y	Y	N	N	Y	N
Employer Member Management Only							
Note: Several roles should not be selected unless instructed by UnitedHealthcare: Employer DSTUHC Use Only, Employer Member Management Partner Use and Employer Member Mang Renewal							

