



# **Small Business Broker and Agency Training Catalog**

**Summer 2025**

**United  
Healthcare®**

# Join us for the 2025 Summer Broker and Agency Webinar Series

Sharpen your skills and knowledge with UnitedHealthcare fully insured, UnitedHealthcare Level Funded, and services and processes for small business through our 2025 Summer Broker and Agency Webinar Series. With over 50 informative and engaging webinars on topics such as specialty products, renewal and conversion training, pharmacy strategy, UHC eServices basics and more, our webinars are designed to help you gain an even better understanding of UnitedHealthcare products and services.

Make sure you and your agency are up to date on our most current products, sales and renewal tools, wellness programs, member service tools and everything else you need to know to be an invaluable resource to your clients. The trainings and information in these webinars will help position you to increase sales and retention, efficiently serve your clients and give you the tools to maximize success this year and beyond.

Please review our 2025 summer webinar catalog and join us for the webinars that best set you and your agency up for success.

For more information, please contact your UnitedHealthcare representative.



# Table of contents

Benefitter Training..... 3

Broker Technology and Innovations ..... 3

Mineral Overview – Why Mineral Is a Critical Service for Your Clients ..... 3

New Business Broker and Agency 101 Training ..... 3

Renewal Broker and Agency 101 Training..... 3

Small Business Consumer Value Adds – UHC Rewards, Care Cash, Vital Meds and More ..... 3

Surest 2-50 Level Funded – Overview, Tips and Tricks..... 4

UnitedHealthcare Conversion Process – Fully Insured to Level Funded and Surest..... 4

UnitedHealthcare Level Funded Executive Summary Review for Brokers ..... 4

UnitedHealthcare Level Funded Overview – Our Lead Small Business Product..... 4

UnitedHealthcare Pharmacy Strategy – Fully Insured, Level Funded and Surest..... 4

UnitedHealthcare Specialty Products – Highlights and Bundling Programs ..... 5

UHCeServices Basics – Know Your UHC Small Business Agency Tools ..... 5

# Topic listing and descriptions

## Benefitter Training

Benefitter is a small group quote-to-enroll platform for small business medical and specialty benefits that was designed for and by agents to help you earn more in less time. This training is designed to provide a comprehensive overview of how to use the Benefitter platform. After attending the Benefitter Training session, sign up for additional, in-depth trainings on how to use the fully insured enrollment feature and Level Funded process.

## Broker Technology and Innovations

UnitedHealthcare is working to transform health care by leveraging data, advanced technology, and bringing new and innovative solutions to market.

Learn how our broker, employer and member facing technology enhancements and innovations will improve how you and your clients do business with UnitedHealthcare through the power of internal and external collaboration. This session will review capabilities related to Employee Navigator, Surest, the employee digital experience with myuhc.com and the broker digital experience on uhceservices.com.

## Mineral Overview – Why Mineral Is a Critical Service for Your Clients

This training will review why Mineral's ACA filing, HR and compliance resources are critical for your UnitedHealthcare Level Funded small business clients, with insights and experiences shared from the UnitedHealthcare small business team. Beginning with the 2025 tax year, UnitedHealthcare Level Funded groups complete their ACA filings via Mineral.

Learn about how UnitedHealthcare groups have benefited from unlimited access to Mineral's HR and compliance support platform and expertise, how the 2025 ACA tax filing season went and how to prepare your clients for the future.

## New Business Broker and Agency 101 Training

This comprehensive webinar will cover the latest industry trends, essential updates from your UnitedHealthcare sales team and practical strategies for navigating the UnitedHealthcare 2-50 segment. Whether you are new to UnitedHealthcare or looking to stay ahead of the curve, this training will provide valuable insights to help you succeed. This is a great opportunity to enhance your skills and stay informed.

## Renewal Broker and Agency 101 Training

This training will review the small business renewal process and explain how to read our small business quotes. We will discuss our approach to the variety of product offerings we have, including fully insured, Level Funded, specialty lines and our newest Level Funded product, Surest. We will share our best practices to ensure you are obtaining the most competitive multiline UnitedHealthcare quotes for your clients as quickly and efficiently as possible.

## Small Business Consumer Value Adds – UHC Rewards, Care Cash, Vital Meds and More

Support and wow your clients and prospects with the details of UnitedHealthcare small business value adds that will be reviewed in this training. We will explore the key programs available to UnitedHealthcare small business members, including UnitedHealthcare Rewards, Care Cash, Vital Meds and more. Learn how these benefits can provide added value to the UnitedHealthcare members you support, improve their overall well-being, support or reduce their health care expenses, and review best practices for members accessing and presenting these benefits.

## Surest 2-50 Level Funded – Overview, Tips and Tricks

The Surest 2-50 Level Funded presentation will highlight how Surest plans work and may help you identify which of your clients and prospects are good fits for Surest plans. We will include a demo of the Surest app, discuss how to pick the right Surest plan for your client, review broker presentation best practices and break down members costs on a Surest plan. The goal is to help brokers and employers achieve a more comprehensive understanding of how Surest is revolutionizing health care by simplifying the member experience, minimizing unexpected bills and helping you hit the ground running with Surest in the small business space.

## UnitedHealthcare Conversion Process – Fully Insured to Level Funded and Surest

In this training, we'll highlight the process of converting UnitedHealthcare fully insured groups to UnitedHealthcare Level Funded and Surest at renewal. We'll review how to process and submit a conversion using uhcDOCs as well as best practices. This training will not only help you become more confident with the conversion process but will also give your clients the support they may need in providing better plan decisions for their employees.

## UnitedHealthcare Level Funded Executive Summary Review for Brokers

The UnitedHealthcare Level Funded Executive Summary Review for Brokers presentation will provide a deep dive into the layers of information available for your clients' UnitedHealthcare Level Funded plan. The session will focus on how to interpret and understand the utilization data provided in the report as well as address frequently asked questions and enhancements scheduled for 2025. The goal is to help brokers and employers achieve a more comprehensive understanding of not only how your UnitedHealthcare Level Funded groups are performing at a given point in time, but also how to share this information at a glance.

## UnitedHealthcare Level Funded Overview – Our Lead Small Business Product

In this comprehensive training session, we will dive into the various benefit options and capabilities of our **lead small business product**, Level Funded. The webinar is designed to equip attendees with in-depth knowledge and expertise in UnitedHealthcare Level Funded, ensuring they can confidently quote and sell this solution to employers. By the end of the training, attendees will leave with a solid foundation and the confidence needed to successfully promote and sell UnitedHealthcare Level Funded to small business employers.

## UnitedHealthcare Pharmacy Strategy – Fully Insured, Level Funded and Surest

Staff from the UnitedHealthcare Pharmacy team will review our pharmacy management, member experience and cost-reduction strategies. This presentation will give you a better understanding of UnitedHealthcare and industry-wide drug coverage decisions, and the tools you need to better coach your clients through the complicated web of generic, brand-name and specialty drugs in the marketplace. We will offer a comparison of our standard 4-Tier Advantage Prescription Drug List (PDL), the 3-Tier Advantage PDL included in Surest plans and our Essential PDL in order to help you support your clients best.

## **UnitedHealthcare Specialty Products – Highlights and Bundling Programs**

UnitedHealthcare's specialty benefits offerings are designed to work seamlessly with our medical plans to provide a positive experience and meet the needs of customers. Starting in 2025, we offer bundling opportunities that could help you reduce the cost of your medical premiums on UnitedHealthcare Level Funded plans that you and your team will want to know about! We will review our specialty products, including Dental, Vision, and financial protection, and the ways in which you can bundle these additional lines for maximum savings. Whether you are new to UnitedHealthcare specialty or have been selling it for years, you will benefit from an overview of these products and features.

## **UHCeServices Basics - Know Your UHC Small Business Agency Tools**

This training will educate brokers and agency staff on the basics of our small business broker portal, [uhceservices.com](https://uhceservices.com), a critical tool needed to work with us in the small business space. Whether you are assisting your existing clients with billing or eligibility needs; quoting or renewing UnitedHealthcare fully insured, UnitedHealthcare Level Funded or specialty lines; or leveraging the wide variety of sales, account management and marketing material resources in our broker portal; this is a tool that you and your team will want to have at your disposal!

Webinar session title	Start/end time	Location
<b>Benefitter Training</b>	Click registration link for training availability	<a href="#">Register for this webinar</a>
<b>Broker Technology and Innovations</b>	June 5, 11 a.m.-12 p.m. CT	<a href="#">Register for this webinar</a>
	July 17, 11 a.m.-12 p.m. CT	<a href="#">Register for this webinar</a>
	Aug. 14, 11 a.m.-12 p.m. CT	<a href="#">Register for this webinar</a>
	Sept. 18, 11 a.m.-12 p.m. CT	<a href="#">Register for this webinar</a>
<b>Mineral Overview – Why Mineral Is a Critical Service for Your Clients</b>	June 17, 11 a.m.-12 p.m. CT	<a href="#">Register for this webinar</a>
	June 19, 1-2 p.m. CT	<a href="#">Register for this webinar</a>
	July 10, 11 a.m.-12 p.m. CT	<a href="#">Register for this webinar</a>
	July 23, 1-2 p.m. CT	<a href="#">Register for this webinar</a>
	Aug. 21, 11 a.m.-12 p.m. CT	<a href="#">Register for this webinar</a>
	Sept. 16, 1-2 p.m. CT	<a href="#">Register for this webinar</a>
<b>New Business Broker and Agency 101 Training</b>	June 3, 10-11 a.m. CT	<a href="#">Register for this webinar</a>
	July 15, 10-11 a.m. CT	<a href="#">Register for this webinar</a>
	Aug. 19, 10-11 a.m. CT	<a href="#">Register for this webinar</a>
	Sept. 9, 10-11 a.m. CT	<a href="#">Register for this webinar</a>
<b>Renewal Broker and Agency 101 Training</b>	June 19, 10-11 a.m. CT	<a href="#">Register for this webinar</a>
	July 17, 10-11 a.m. CT	<a href="#">Register for this webinar</a>
	Aug. 14, 10-11 a.m. CT	<a href="#">Register for this webinar</a>
	Sept. 18, 10-11 a.m. CT	<a href="#">Register for this webinar</a>
<b>Small Business Consumer Value Adds – UHC Rewards, Care Cash, Vital Meds and More</b>	June 24, 1-2 p.m. CT	<a href="#">Register for this webinar</a>
	July 22, 1-2 p.m. CT	<a href="#">Register for this webinar</a>
	Aug. 19, 1-2 p.m. CT	<a href="#">Register for this webinar</a>
<b>Surest 2-50 Level Funded – Overview, Tips and Tricks</b>	June 4, 11 a.m.-12 p.m. CT	<a href="#">Register for this webinar</a>
	June 18, 10-11 a.m. CT	<a href="#">Register for this webinar</a>
	July 9, 10-11 a.m. CT	<a href="#">Register for this webinar</a>
	Aug. 13, 10-11 a.m. CT	<a href="#">Register for this webinar</a>
	Sept. 10, 10-11 a.m. CT	<a href="#">Register for this webinar</a>

Webinar session title	Start/end time	Location
<b>UnitedHealthcare Conversion Process – Fully Insured to Level Funded and Surest</b>	June 12, 11 a.m.–12 p.m. CT	<a href="#">Register for this webinar</a>
	July 8, 1–2 p.m. CT	<a href="#">Register for this webinar</a>
	Aug. 12, 11 a.m.–12 p.m. CT	<a href="#">Register for this webinar</a>
	Sept. 11, 12–1 p.m. CT	<a href="#">Register for this webinar</a>
<b>UnitedHealthcare Level Funded Executive Summary Review for Brokers</b>	June 18, 1–2 p.m. CT	<a href="#">Register for this webinar</a>
	July 16, 1–2 p.m. CT	<a href="#">Register for this webinar</a>
	Aug. 13, 1–2 p.m. CT	<a href="#">Register for this webinar</a>
	Sept. 10, 1–2 p.m. CT	<a href="#">Register for this webinar</a>
<b>UnitedHealthcare Level Funded Overview – Our Lead Small Business Product</b>	June 11, 2–3 p.m. CT	<a href="#">Register for this webinar</a>
	July 15, 2–3 p.m. CT	<a href="#">Register for this webinar</a>
	Aug. 12, 2–3 p.m. CT	<a href="#">Register for this webinar</a>
	Sept. 17, 2–3 p.m. CT	<a href="#">Register for this webinar</a>
<b>UnitedHealthcare Pharmacy Strategy – Fully Insured, Level Funded and Surest</b>	June 26, 10–11 a.m. CT	<a href="#">Register for this webinar</a>
	July 31, 10–11 a.m. CT	<a href="#">Register for this webinar</a>
	Sept. 17, 10–11 a.m. CT	<a href="#">Register for this webinar</a>
<b>UnitedHealthcare Specialty Products – Highlights and Bundling Programs</b>	June 24, 9:30–10:30 a.m. CT	<a href="#">Register for this webinar</a>
	July 24, 2–3 p.m. CT	<a href="#">Register for this webinar</a>
	Aug. 20, 9:30–10:30 a.m. CT	<a href="#">Register for this webinar</a>
	Sept. 9, 2–3 p.m. CT	<a href="#">Register for this webinar</a>
<b>UHCeServices Basics – Know Your UHC Small Business Agency Tools</b>	June 4, 10–11 a.m. CT	<a href="#">Register for this webinar</a>
	July 16, 10–11 a.m. CT	<a href="#">Register for this webinar</a>
	Aug. 6, 10–11 a.m. CT	<a href="#">Register for this webinar</a>



# On-Demand videos and agency process quick references

## Videos

- [UHC e Services for employers and brokers](#)
- [Member digital plan management](#)
- [UHC Level Funded](#)
- [Intro to the Surest plan for employers and members](#)
- [Surest Level Funded deep dive for broker and agency staff](#)
- [UHC Rewards employer](#)
- [Care Cash experience](#) (availability by line of business and state)
- [Mineral HR & Compliance support for employers](#) (availability by line of business)
- [Mineral's ACA Reporting Solution Broker Training Demo for UHC Level Funded](#)
- [SAMx Fully Insured for quoting and enrollment for agency staff](#)
- [SAMx Level Funded for quoting, underwriting, enrollment, etc for agency staff](#)
- [SAMx Level Funded Automated Funding Conversion from FI to LF Training for agency staff](#)

## Agency process quick references

- [uhceservices.com Access FAQ](#)
- [SAMx – Level Funded Case Statuses Job Aid](#)
- [SAMx – Level Funded Renewals](#)
- [Automated Funding Conversion for Brokers](#)
- [uhceservices.com for Brokers Training Guide](#)
- [Benefitter Help Center](#)

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