

New Sales Bonus

For new fully insured medical cases with up to 100 eligible employees.



UnitedHealthcare is offering a bonus to agents in California who sell new fully insured small group medical plans with effective dates from October 1, 2018 through January 31, 2019. Eligible new cases are fully insured medical groups with up to 100 eligible employees located in California that have effective dates from October 1, 2018 through January 31, 2019.

In order to receive a bonus:

- 1 Eligible agents must sell a combined total of at least 25 enrolled employees in eligible new small groups during the bonus period;
- 2 The agent must have at least 100 enrolled employees in groups with up to 100 eligible employees on January 31, 2019 (this measure includes all existing small groups, and not just new cases); and,
- 3 The agent must have at least as many enrolled employees in groups with up to 100 eligible employees on January 31, 2019 as they had on September 30, 2018 (this measure also includes all existing small groups, and not just new cases).

The bonus amount paid increases with the total number of enrolled employees in eligible cases, according to the following table:

Total of Enrolled Employees in All Eligible New Groups	Bonus for Each Enrolled Employee in Eligible Groups
25 to 49 enrolled employees	\$50
50 to 99 enrolled employees	\$75
100 or more enrolled employees	\$100

Only agents permanently located in California are eligible for the bonus.

Bonus Example: An eligible agent sells 10 eligible medical cases having a total of 200 enrolled employees during the bonus period. The agent had 50 enrolled employees on September 30, 2018 and 250 enrolled employees on January 31, 2019. The agent has met all the bonus requirements, and earns a bonus calculated as follows: \$100 for each enrolled employee in eligible new groups equals \$100 times 200 enrolled employees, or \$20,000.

Program Details:

1. This bonus program replaces UnitedHealthcare bonus number 2018-015. The termination date for that bonus has been changed to September 30, 2018, and the qualifying requirements for that bonus have been reduced to adjust for the shorter qualification period.
2. Only Agents of Record permanently located in California are eligible for this program.
3. This special bonus program applies only to commissionable new fully insured medical groups that have up to 100 eligible employees, are located in California and have effective dates with UnitedHealthcare from October 1, 2018 through January 31, 2019.
4. Agents must sell a combined total of at least 25 enrolled employees in eligible new groups during the bonus period to qualify for the bonus.
5. Agents must also have a combined total of at least 100 enrolled employees in ALL groups with up to 100 eligible employees on January 31, 2019 to qualify for the bonus. This count includes the enrolled employees in all groups with up to 100 eligible employees for which the agent is Agent of Record.
6. Agent must have at least as many enrolled employees in groups with up to 100 eligible employees on January 31, 2019 as they had on September 30, 2018. The counts used in this comparison includes the enrolled employees in all groups with up to 100 eligible employees for which the agent is Agent of Record on the respective measurement dates.
7. All sold business must be active and the selling agent must remain the Agent of Record on January 31, 2019 to be included in the bonus calculations.
8. Classification as a group “with up to 100 eligible employees” is determined by us considering a number of factors, including the enrollment at some point in time. We reserve the right to classify groups according to our rules, regardless of a group’s actual enrollment at any time.
9. The enrolled employee counts will be derived from the medical plan only, and will be based on the number of enrolled medical employees as of the group’s effective date. UnitedHealthcare’s determination of group and enrolled employee count is final.
10. All bonus payments will be made to the agent or agency to which the commissions are paid. The bonus will be paid after the bonus period is over and when all information required for verification of enrollment data and calculation of the bonus is available.
11. For dual or multiple broker arrangements, enrolled employee credit for payment calculations will be allocated in the same proportion as the commissions are split on the case. Fractional credits will be used in the calculation, and credits will not be rounded to the nearest integer.
12. General Agents are not eligible for the bonus.
13. Cases transferring into the up to 100 eligible employee size segment from another UnitedHealth Group subsidiary, business segment or case size segment will not be considered new business for this bonus program. Agent of Record changes on existing UnitedHealthcare cases will not be credited as new business for this bonus program.
14. Special rules apply to payment of bonuses for non-commissionable customers and customers referred to as “Governmental Entities” in the UnitedHealthcare Agent/Agency Agreement. Non-commissionable governmental entity cases are not eligible for any bonus program. We require written customer acknowledgment and approval before paying bonuses on other non-commissionable customers, and on commissionable governmental entity customers. Any limits on compensation in the RFP, RFI, bid specifications or other written instructions for governmental entities cannot be exceeded. Please refer to the Producer Compensation Policies and Practices in the Producer Performance Guide for more information.

All terms and conditions of the UnitedHealthcare Agent Agency Agreement and the Producer Performance Guide apply to all compensation programs. This Bonus Program is offered at the sole discretion of UnitedHealthcare and can be terminated or modified by UnitedHealthcare at any time and without notice.

