



Uhceservices.com Reference Guide for Brokers



**United
Healthcare**

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.

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	22
4 Gear Icon	23
4 Invite User	24
4 Manage User	26
4 Re-Invite a User	27
4 My Settings	29
4 Manage Broker	30
4 Manage My Profile	32
4 Roles and Permissions (My Associations).....	35
4 View and Update Broker Contact Information.....	36
4 Update a User’s Account Overdue Balance Alert Preferences	37
4 Message Center	38
5 Group Selection	39
5 Group Selection: PEO Groups.....	40
6 Small Group Quoting & Renewals	41
6 Help Me Decide	42
6 Quick Links: Small Group Renewal Packages.....	45
6 Quick Links: Upload Documents	48
6 Quick Links: United eServices (UeS).....	50
6 Quick Links: MyAllSavers (Level Funded).....	52
6 Quick Links: SAM	53
6 Quick Links: Product Grids	54
6 Quick Links: UHC Benefit Services	55



6 Small Group Quoting & Renewal (SAMx, MyAllSavers)	56
7 Manage Members.....	57
7 Member Search.....	58
7 View Member	59
7 Enroll Member	60
7 Update Member.....	66
7 Terminate a Member’s Coverage	69
7 Request a Health Plan ID Card.....	73
7 Reinstate Member.....	75
8 Billing & Payment	78
8 Billing & Payment: Pay as Billed	79
8 Billing & Payment: Go to Billing Home	81
9 Reports	82
9 Member & Subscriber Lists.....	83
9 MLR Reporting.....	86
9 Banking Reports	87
9 Level Funded	89
9 Account Overdue Balance Report	90
10 Plan & Rate Information	92
10 View Benefits.....	94
10 Summary Benefit Coverage.....	95
10 Member Handbook.....	96
10 Employer Handbook.....	97
11 Resources.....	98
11 Employee Engagement Planner	99
11 Forms.....	102
11 Plans and Networks Documents	103
11 Marketing Materials	104
11 Find a Provider.....	105



11 | Upload Documents 118

11 | Training Materials 120

12 | Commissions 121

14 | Other Applications 122

Appendix: Broker Roles and Permissions 123

Appendix: Employer Roles and Permissions 124



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. Internal users must gain access through Secure.

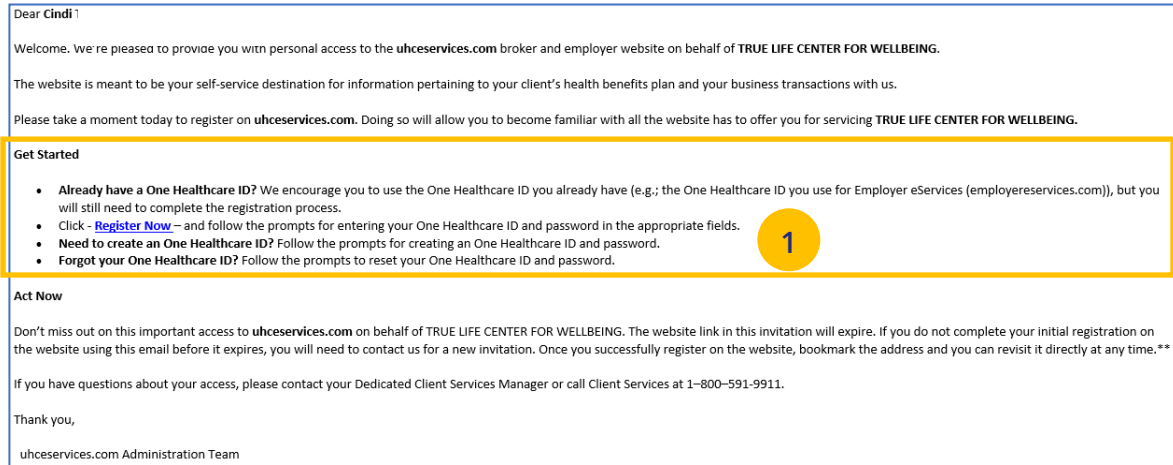
Employers are invited to uhceservices via email. Brokers can be invited in two ways:

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

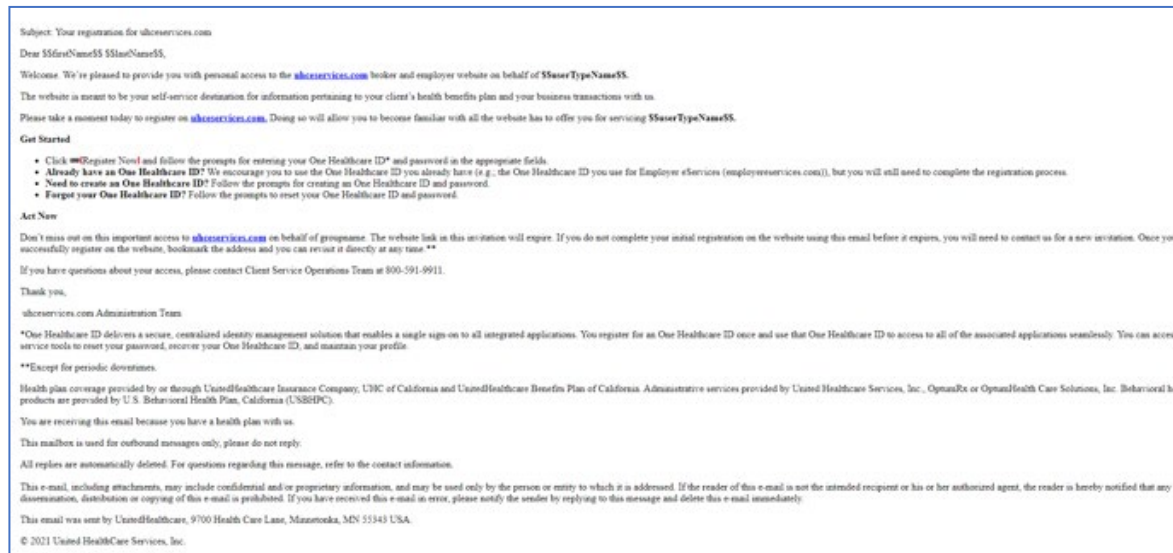
Follow these steps to register for uhceservices after receiving an email invitation.

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)

[TABLE OF CONTENTS](#)

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




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



1 | How to Register: Email Invitation (continued)

- 6. You will get an email with a 10-digit activation code. Enter the code in the 10-digit activation code box and click **Next**.
- 7. Click the **Activate my One Healthcare ID** box.

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

One Healthcare ID-NoReply <noreply@onehealthcareid.com>
To Chintakayala Bhavani

Retention Policy UHGInbox (90 days) Expires 6/23/2021 Thu 3/25/20

Your One Healthcare ID

7

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)

[TABLE OF CONTENTS](#)

8. Click **Continue**.
9. Click **I Agree**.

Email Address Verified

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




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.





1 | How to Register: Email Invitation (continued)

10. 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.

11. Click **Agree**. You are now ready to use uhceservices.com,

The screenshot displays the 'Attestation' screen. At the top, the word 'Attestation' is centered in a large blue font with a horizontal blue line underneath. Below this, the instruction 'Please click each document link to enable the checkbox.' is centered. There are two checkboxes, each with a corresponding document link: 'I have read and agree to the [Terms of Use](#)' and 'I have read and agree to the [Privacy Policy](#)'. A yellow box highlights these two checkboxes, with a yellow circle containing the number '10' to its right. Below the checkboxes are two buttons: a white button with a blue border labeled 'Agree' and a solid dark blue button labeled 'Disagree'. A yellow circle containing the number '11' is positioned to the left of the 'Agree' button.



What is happening?

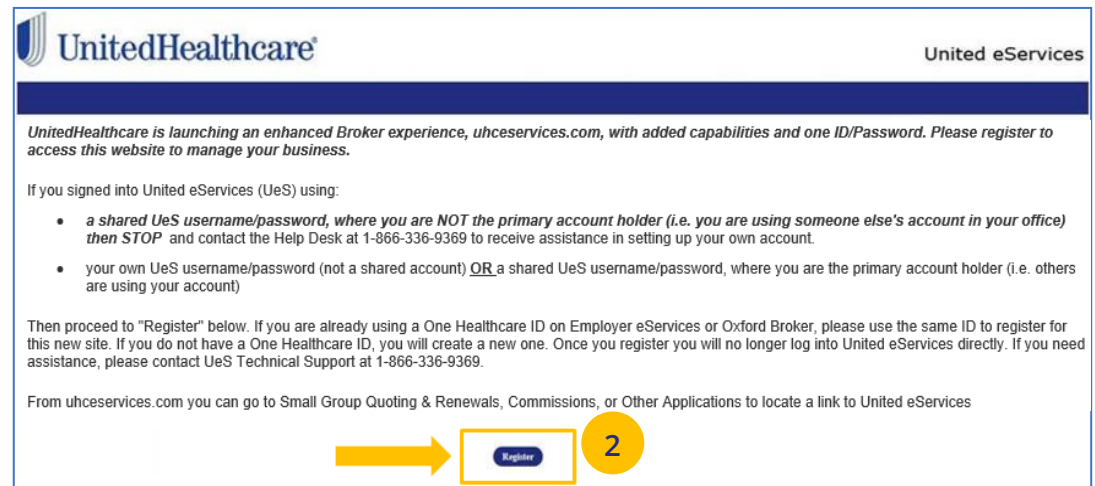
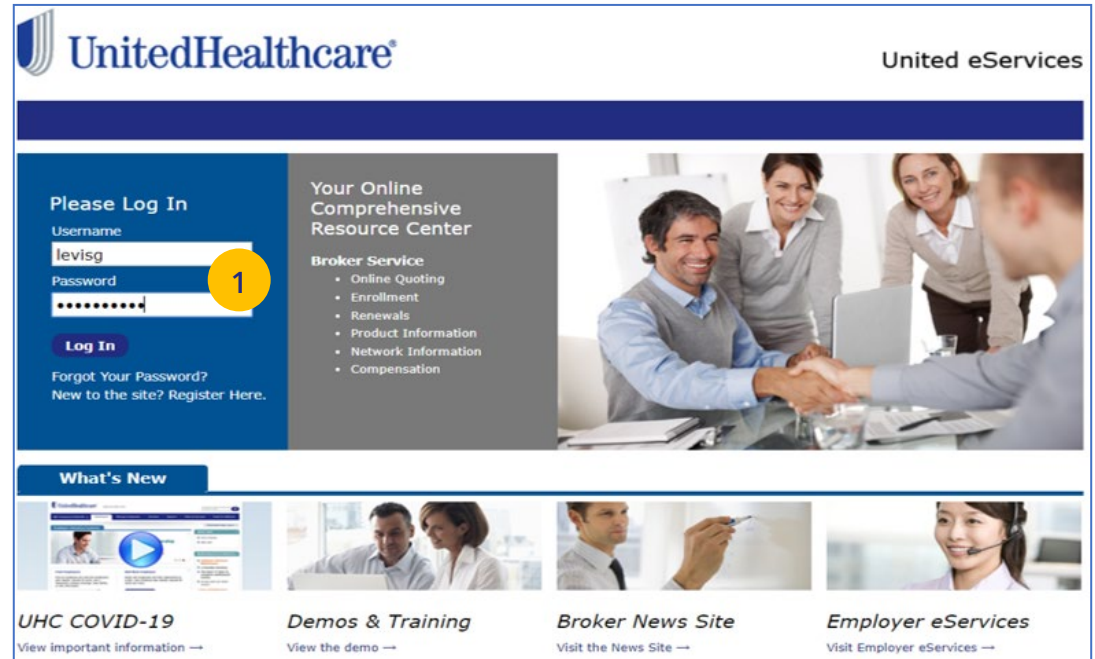
- Brokers will be transitioned from United eServices (UeS) to uhceservices by market in a phased approach. You will receive a message upon logging into United eServices, directing you to register for uhceservices.
- After registering, you will then use uhceservices as your Broker site and access UeS 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**.
- 4. Verify your email address. Click **Next**.

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
 

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

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



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

5. Click **Activate my One Healthcare ID**.
6. Click **Continue**.
7. Click **I Agree**.

Confirm your One Healthcare ID email address

One Healthcare ID-NoReply <noreply@onehealthcareid.com>
To: [Redacted] Thu 3/25/21

Retention Policy UHGInbox (90 days) Expires 6/23/2021

One Healthcare ID

Your One Healthcare ID

Activate my One Healthcare ID 5

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)819-5809 or optumsupport@optum.com.

Email Address Verified

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

Continue 6

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.

I Agree Decline 7

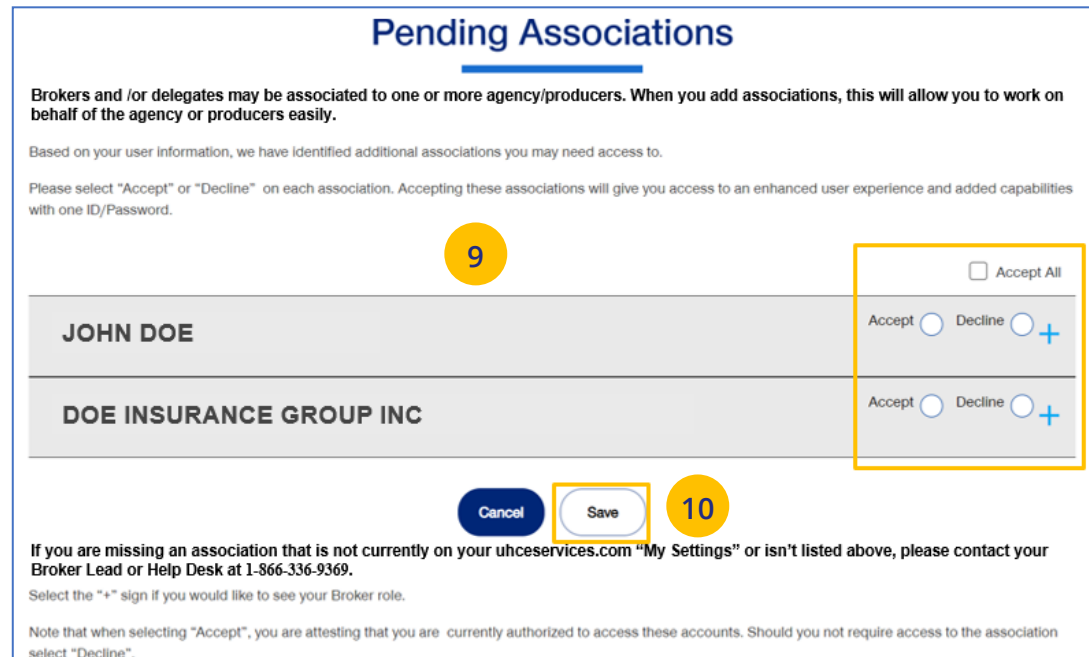
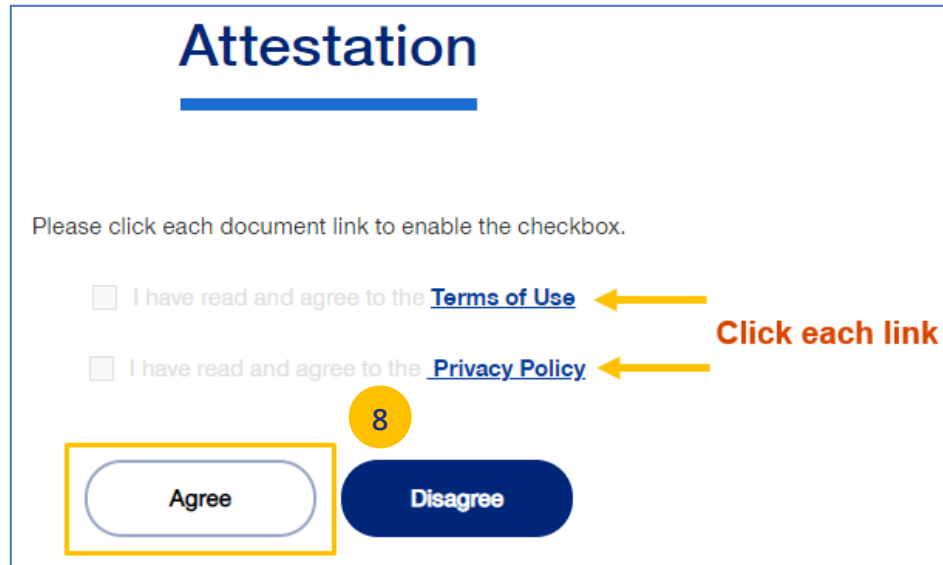


- Follow the Attestation process by clicking each link (Terms of Use and Privacy Policy). Then click **Agree**. The **Pending Associations** screen displays.

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 866-336-9369. 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

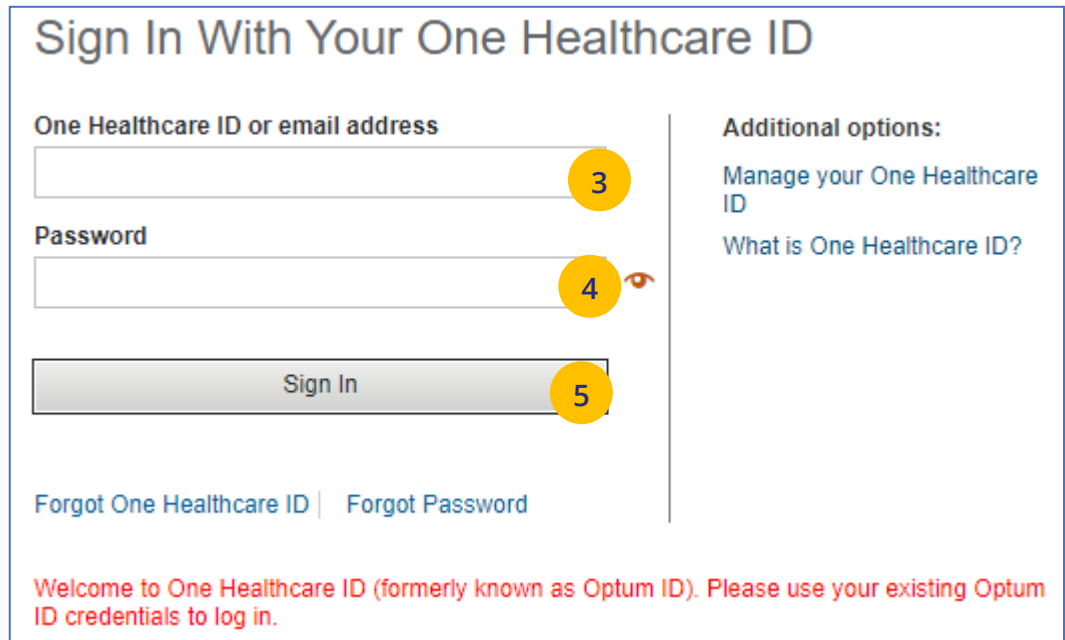
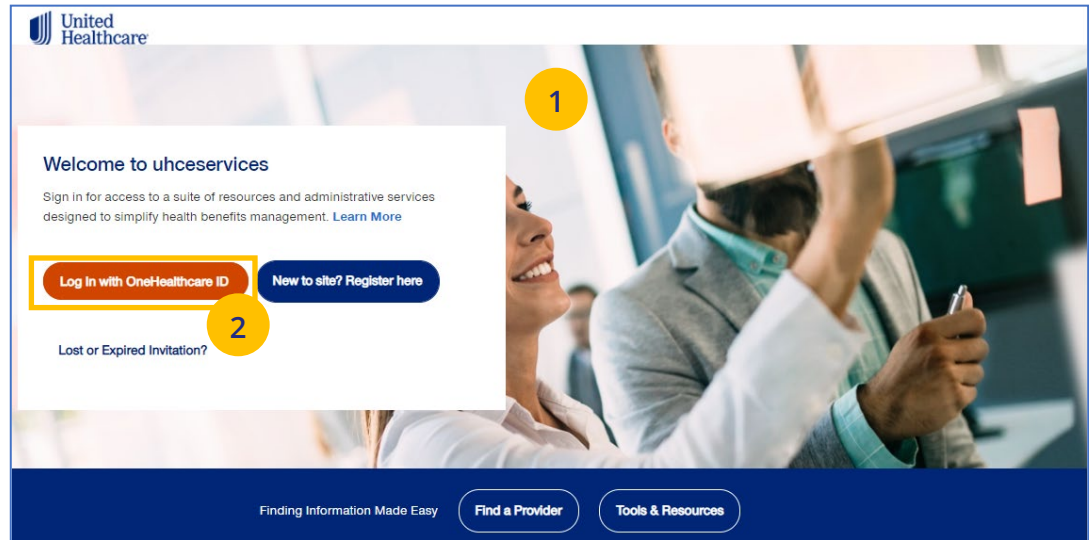
NOTE: Follow the steps below after receiving your official access invite email from uhceserv_invite@uhc.com.

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.

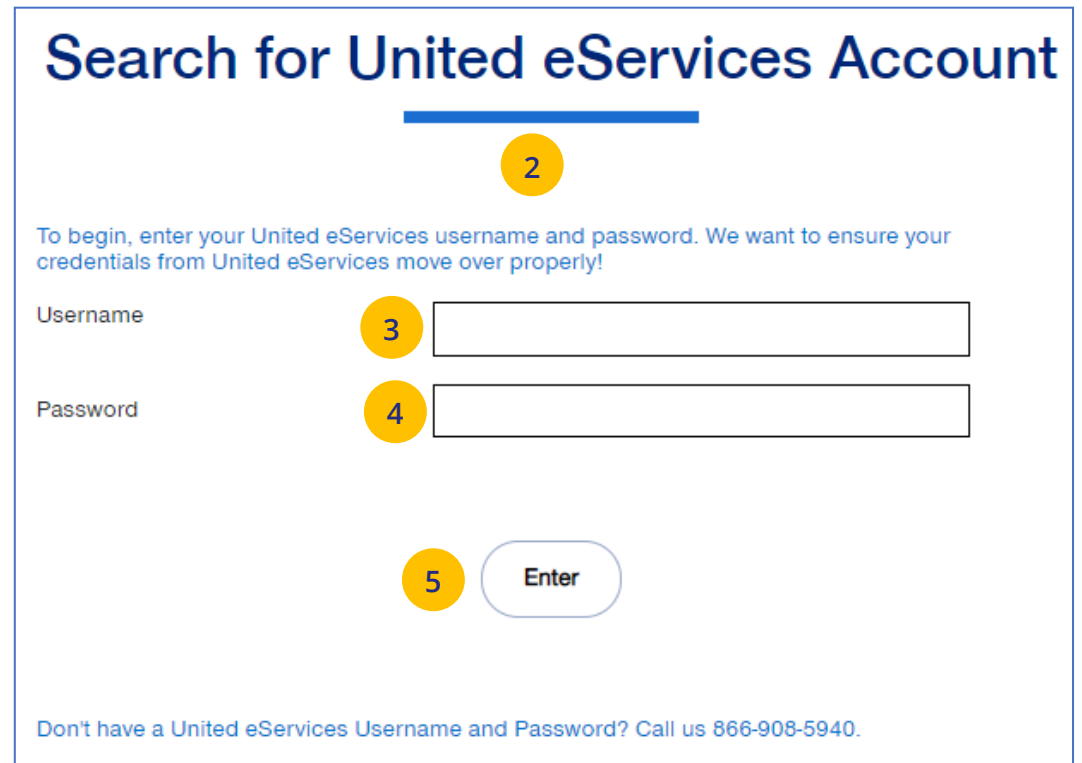
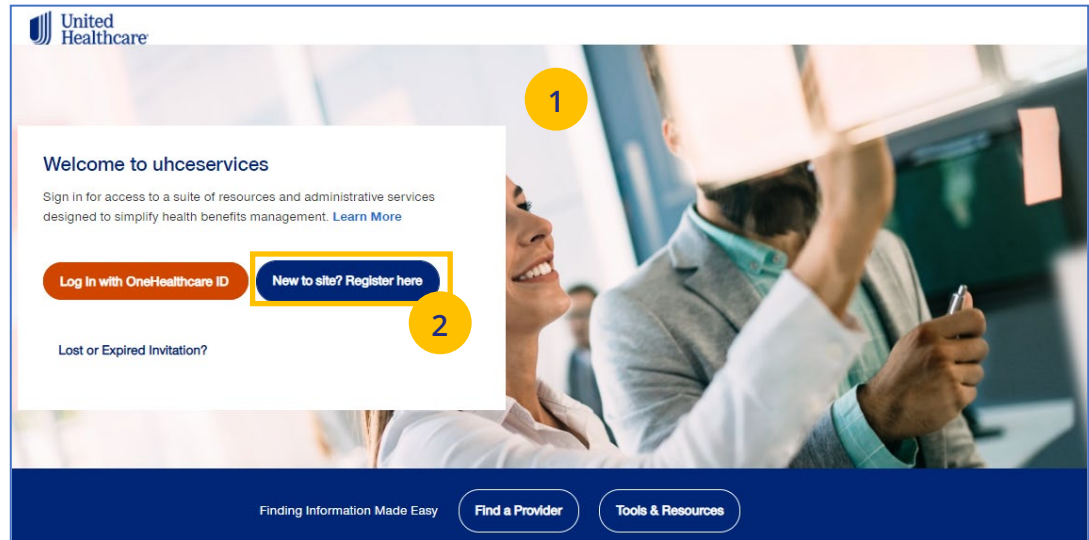
NOTE: If user is inactive for 13 months, the account will be deactivated.



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.

Enter

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.

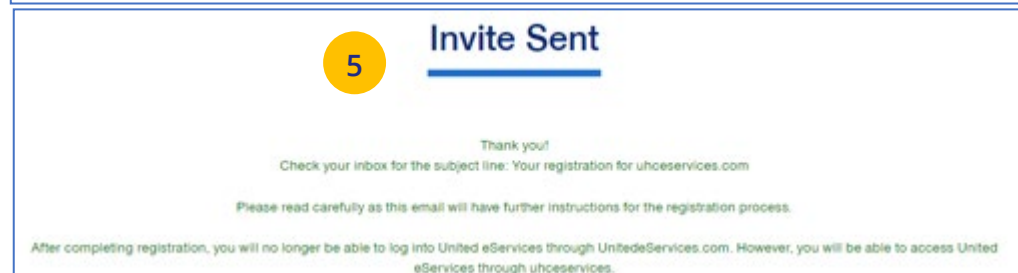
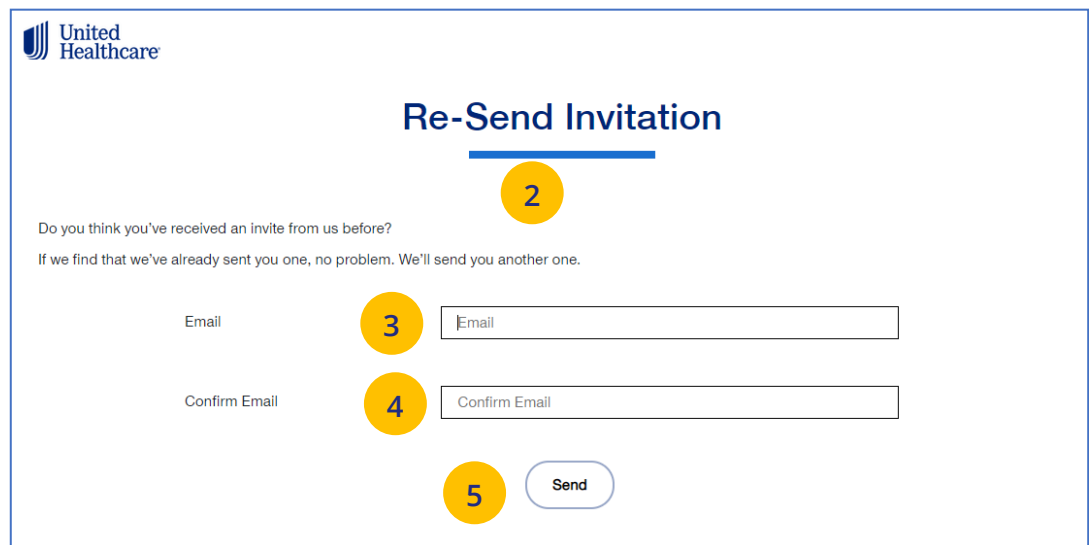
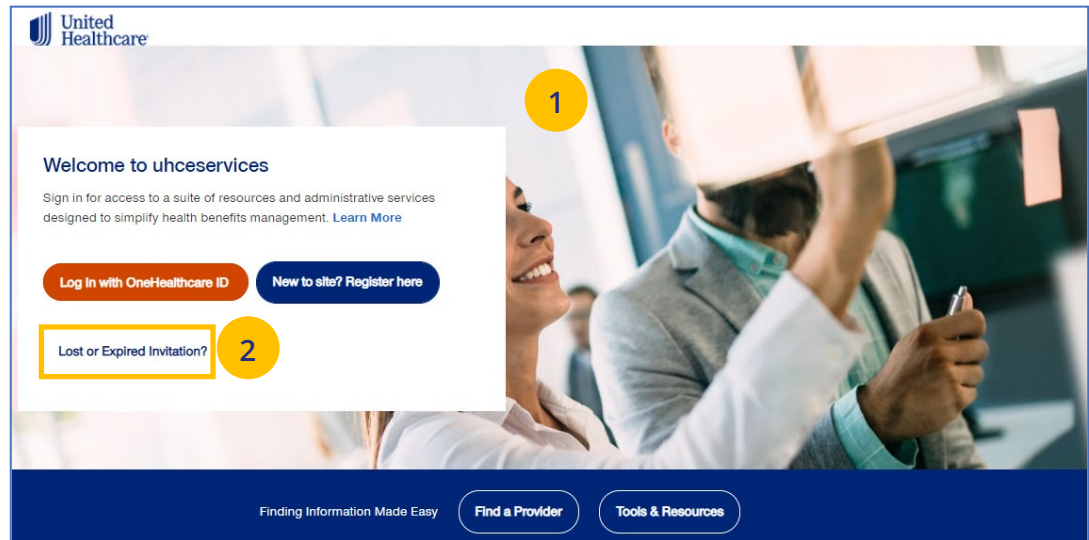


1 | Access: Lost or Expired Invitation

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.




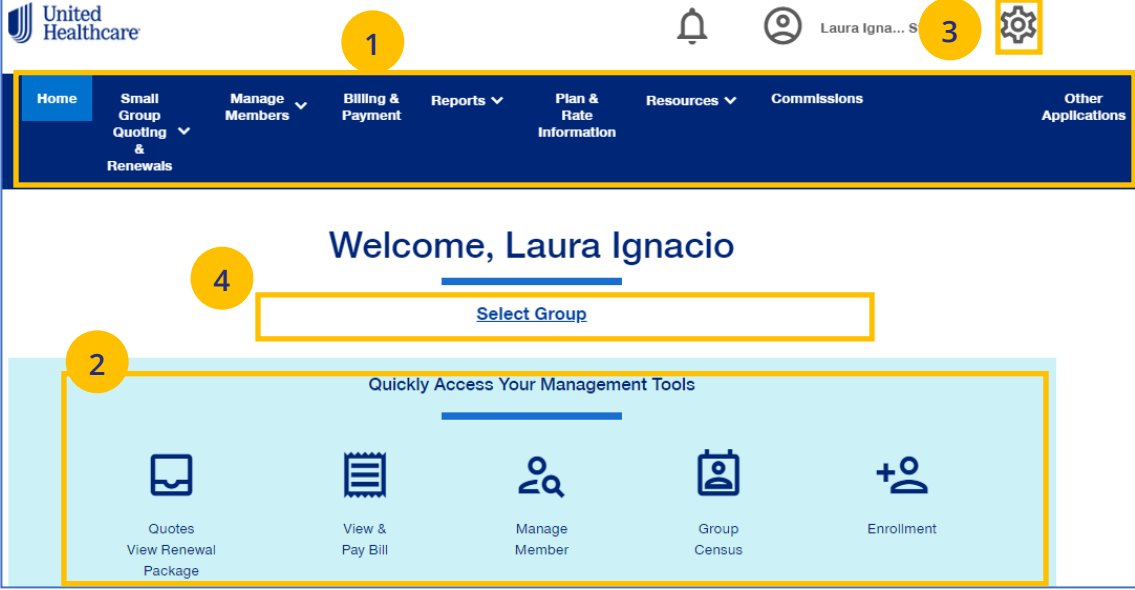
2 | Home

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: 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. The top navigation bar includes: Home, Small Group Quoting & Renewals, Manage Members, Billing & Payment, Reports, Plan & Rate Information, Resources, Commissions, and Other Applications. On the right side of the top bar are a notification bell, a user profile icon for Laura Ignacio, and a gear icon. Below the navigation bar is a welcome message: "Welcome, Laura Ignacio" with a "Select Group" dropdown menu. Underneath 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. At the bottom right is a promotional banner for "uhceservices.com Training Resources for Brokers" with a "Learn More" button. A yellow arrow points from the "Learn More" text in the notes to the "Learn More" button in the banner.

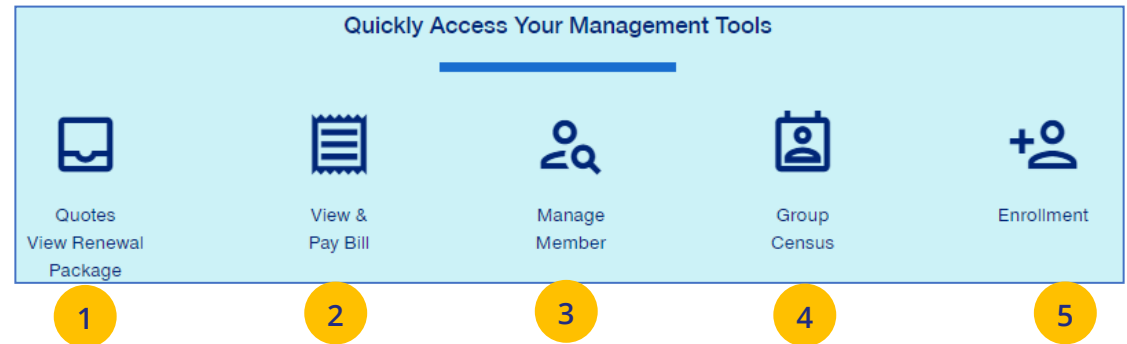


3 | Quickly Access Your Management Tools

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

These shortcuts most often include:

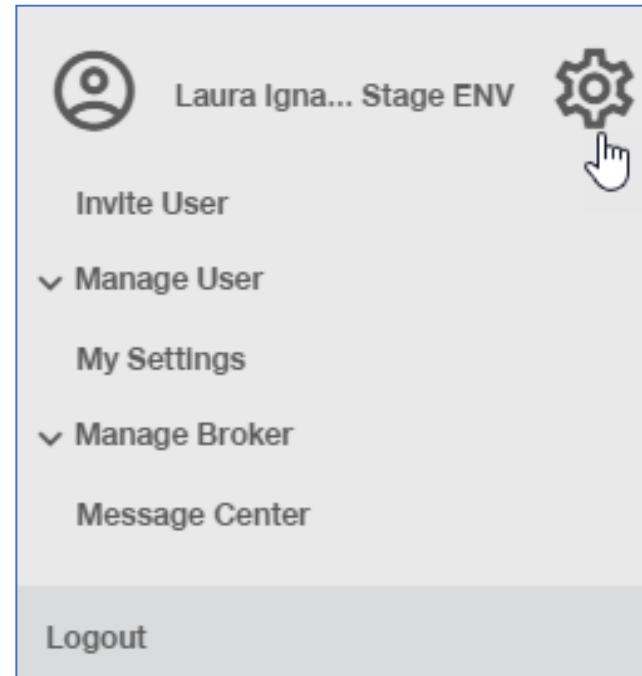
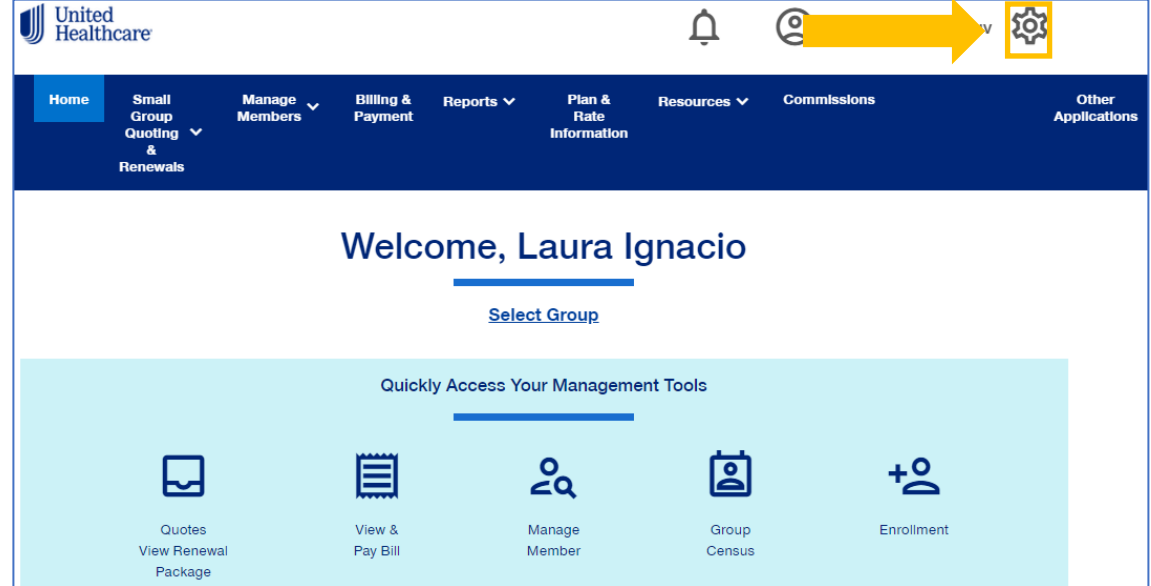
1. **Quotes View Renewal Package** – Access United eServices (UeS) to view quotes and renewal packages
2. **View & Pay Bill** – Displays Billing & Payment screen.
3. **Manage Member** – Allows you to search for a member within the specific group.
4. **Group Census** – Displays Member & Subscriber Lists.
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. **Message Center** – Contains Important messages and is used to retrieve reports that have been generated.
6. **Logout** – Logout of the application.



4 | Invite User

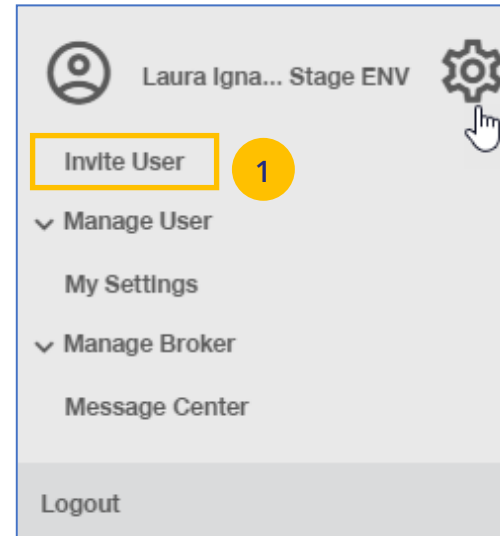
Brokers can give support staff access to uhceservices so they can perform functions on the broker's behalf. To invite a someone to use uhceservices.com:

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

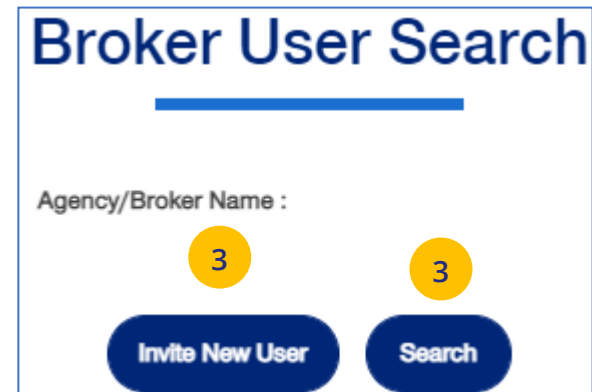
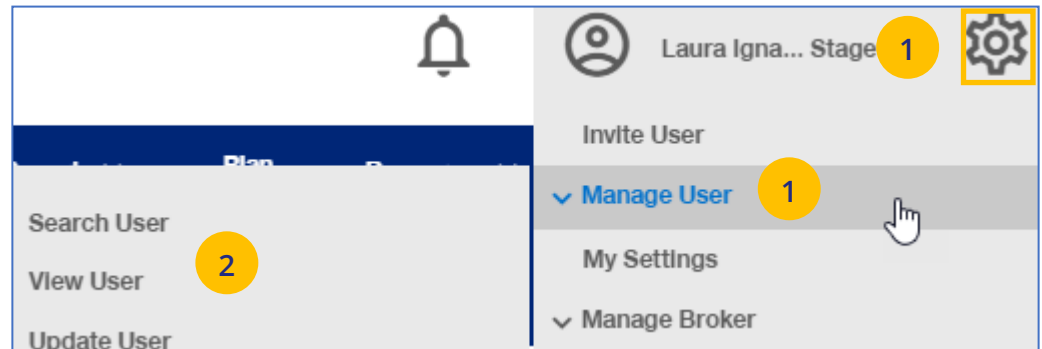
User Louis Johnson successfully invited as Agency/Broker User



4 | Manage User


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

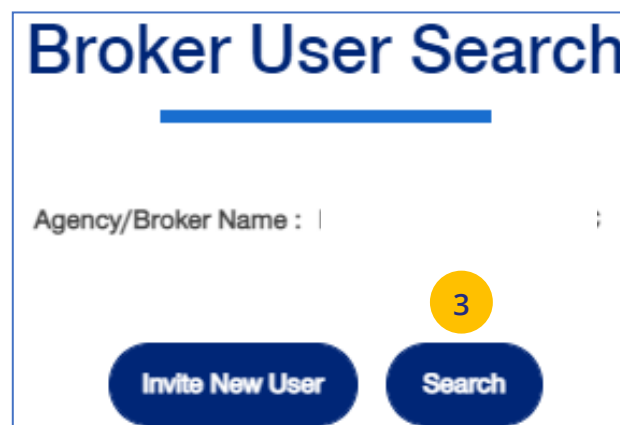
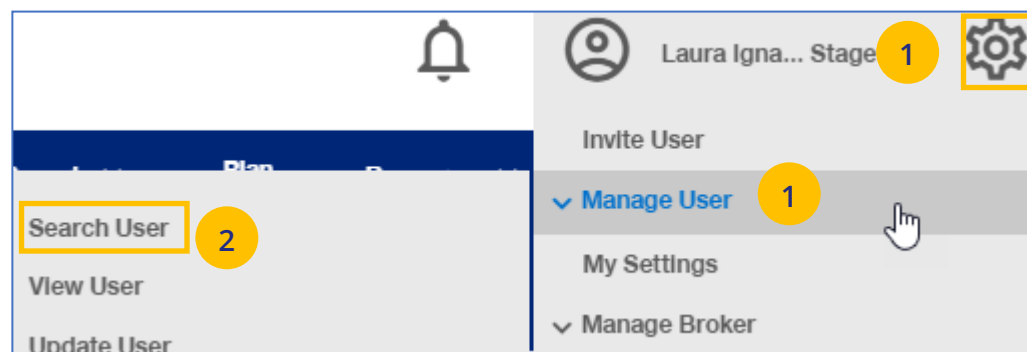
1. Click the **gear icon**  and select **Manage User**. You will have three options:
 - **Search User** – You can search for a user or invite a new user (if you have that capability)
 - **View User** – You can search for a user or invite a new user (if you have that capability)
 - **Update User** – You 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
One Healthcare ID	User Email	Role	Last Login	Deactivation	Re-Invite
	anglette_d_piatt...	Standard Broker with Commissions	N/A	N/A	

Stage ENV ..., Laura Igna... (Enabled)					Select User
One Healthcare ID	User Email	Role	Last Login	Deactivation	
lignacio3	laura_l_ignacio@...	Broker Lead with User Maintenance	06/01/2021	N/A	

Dylan, Louis (Invited)					Select User
One Healthcare ID	User Email	Role	Last Login	Deactivation	Re-Invite
	ldylan@compny.or...	Standard Broker with Commissions	N/A	N/A	

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. **See more information on the next page.**
- **Personal Information** – View details or edit personal information.
- **My Associations** – Broker associations and specific permissions.
- **Platforms/Tools**
- **Contact Information** – Broker Contact information is shown with ability to edit (update).
- **Addresses** – Shows mailing addresses and telephone numbers.

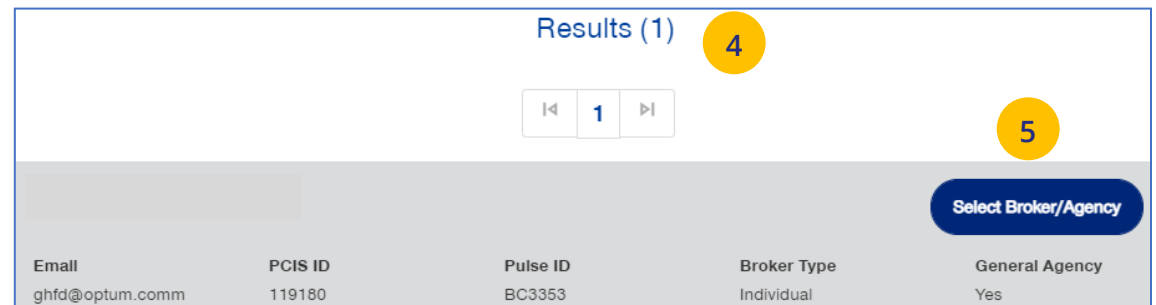
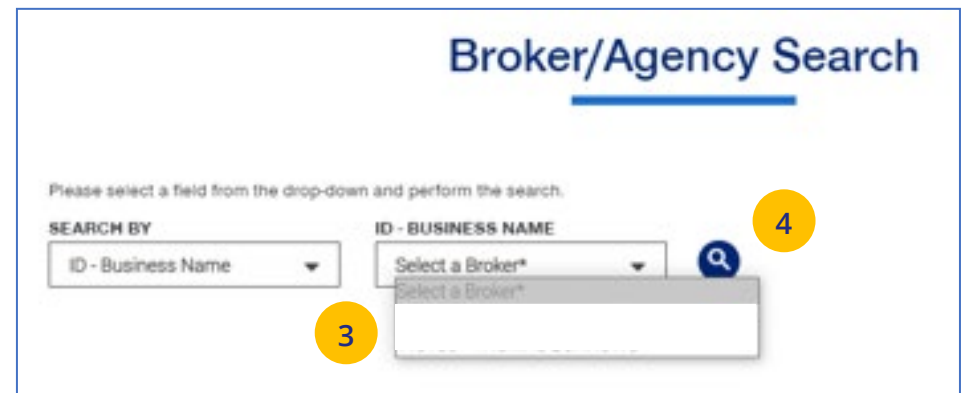
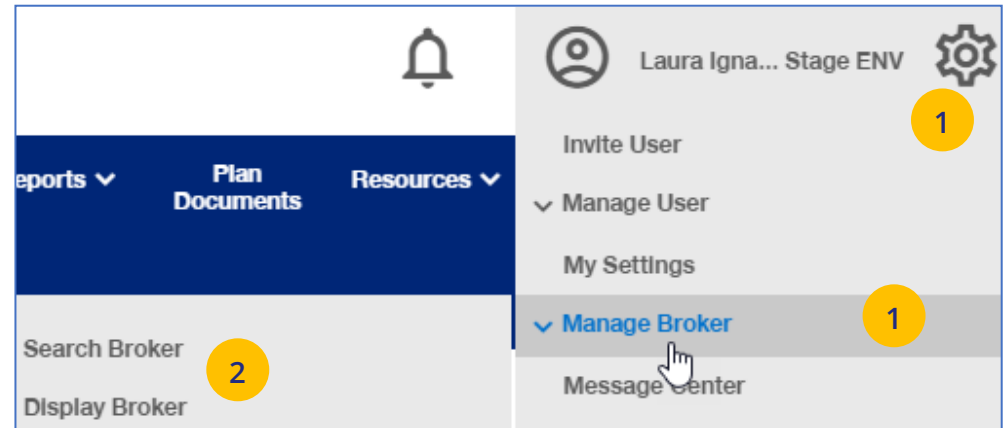
The screenshot displays the user interface for the 'My Settings' page. At the top, a user profile card for 'Laura Igna... Stage ENV' includes a settings gear icon, an 'Invite User' button, and a 'Manage User' dropdown menu. The 'My Settings' option in the dropdown is highlighted with a yellow box and a mouse cursor. Below this, the main 'My Settings' page is shown with a title and two primary action buttons: 'Change Password' and 'Manage My Profile'. A notification states, 'Your changes will be reflected after re-login.' The 'Personal Information' section lists fields for First Name, Last Name, Email, and One Healthcare ID, with an 'Edit' button. The 'My Associations' section shows a 'Broker Role' of 'Admin'. The 'Permissions' section lists 'Billing & Payment' and 'Commissions', each with a plus sign for expansion.



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, with ability to edit (update). **See more information on the next page.**
- **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. **(see page 23)**

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 the navigation bar, there 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 of this section. 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 with a yellow box and a yellow circle containing the number "2". Below the progress bar, there is a question: "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 "Next" button is highlighted with a yellow box and a yellow circle containing the number "2". A "Cancel" button is also visible.



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 1-866-764-7736.

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). Under 'Member Management', tasks include 'Add Member', 'Request ID card', 'Term Member', 'Update Member', 'View Eligibility', and 'View Member'. Under 'Quoting & Renewals', tasks include 'Quoting', 'Renewal', and 'Renewal Package'. Under 'Reports', tasks include '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

Edit

Contact Information

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

Go Green Yes No

Business Email

Business Phone

Business Phone Ext

Business Fax


C/O

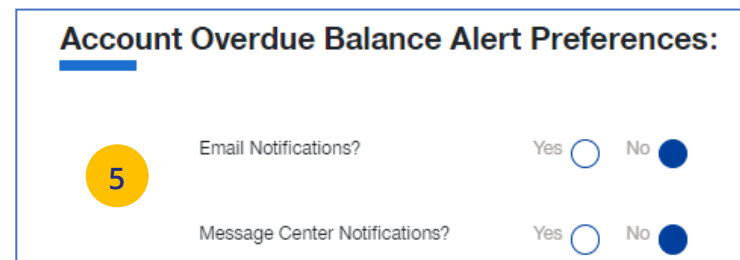
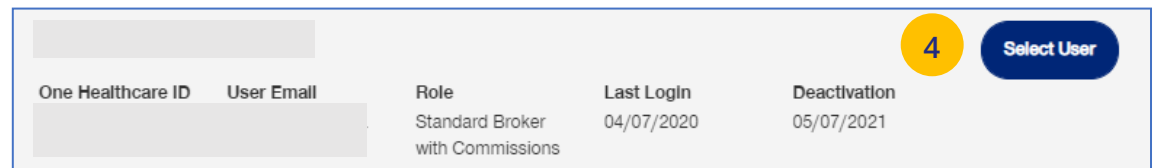
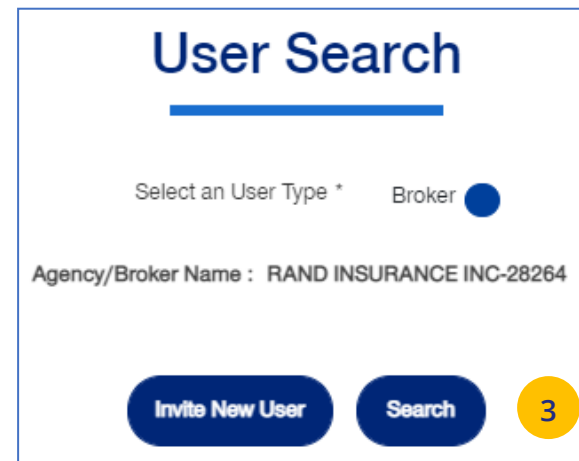
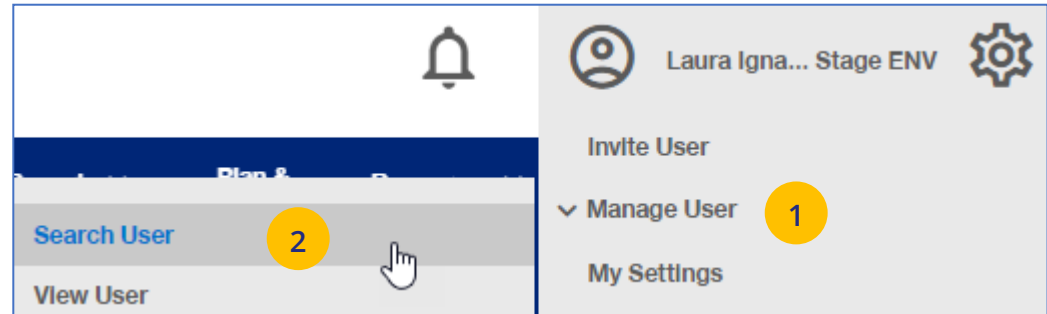
Save Cancel



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. 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**.

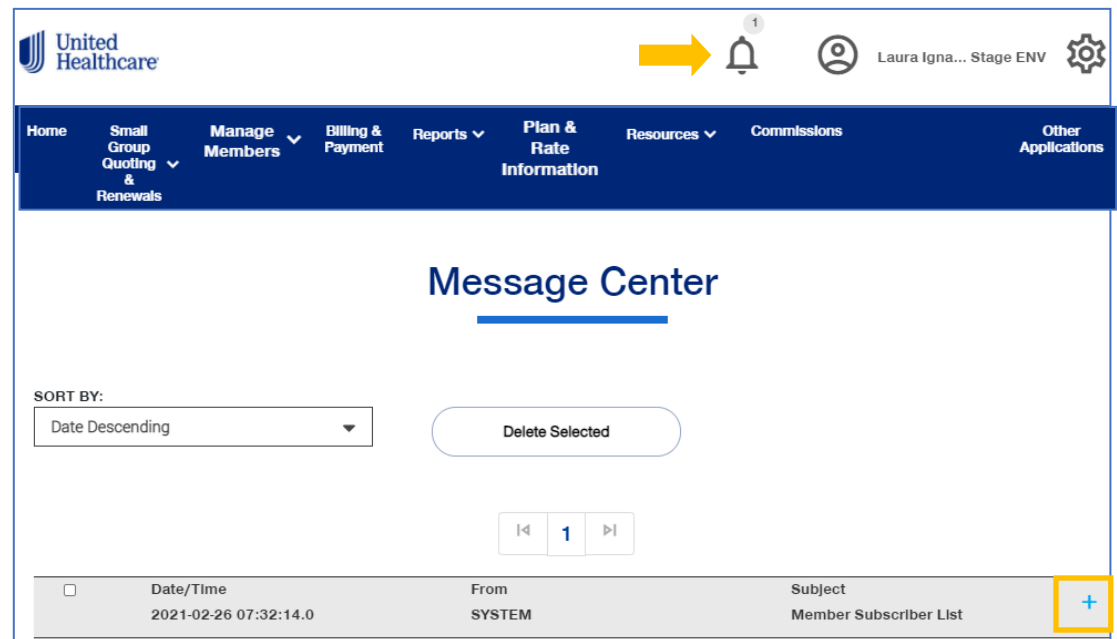
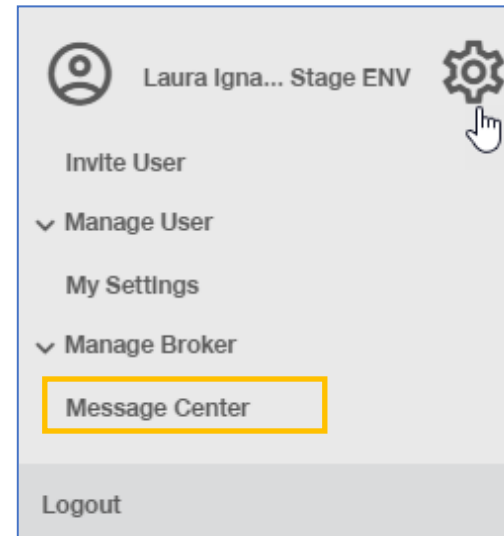


4 | Message Center

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

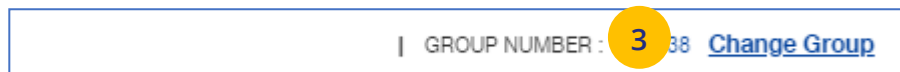
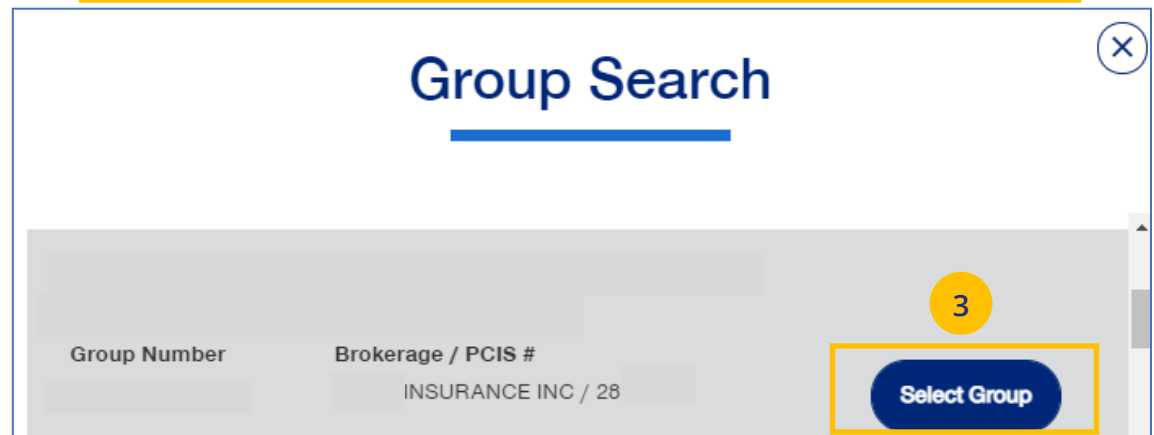
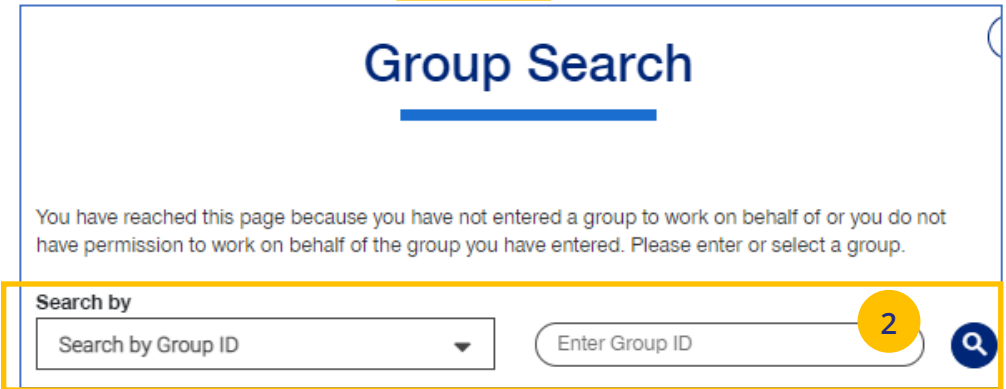
To select a group from the Home page:

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.

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: Level Funding Groups – If the group you are searching for is on the **All Savers** platform, there will be a link to view the group on myallsavers.com.



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](#)

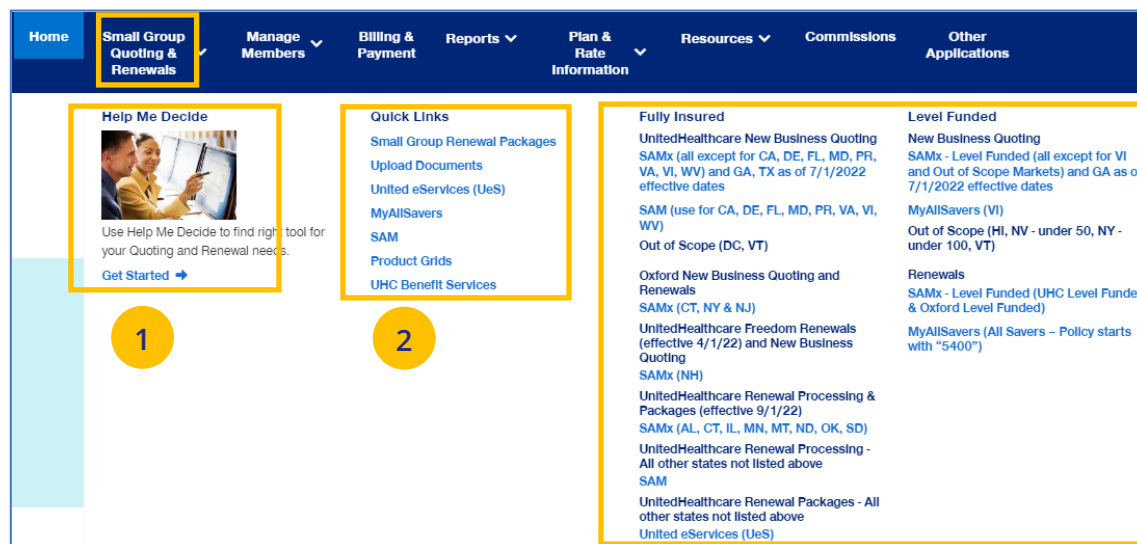
_PARENT4 | GROUP NUMBER : [Change Group](#) 2
_CHILD2 | GROUP NUMBER : [Change Child Group](#)



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 (Oxford CT Read Only)
 - Product Grids
 - UHC Benefit Services
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



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 the 'Small Group Quoting & Renewals' dashboard. The navigation bar at the top includes 'Home', 'Small Group Quoting & Renewals' (highlighted with a yellow box and a '1' in a yellow circle), 'Manage Members', 'Billing & Payment', 'Reports', 'Plan & Rate Information', 'Resources', 'Commissions', and 'Other Applications'. Below the navigation bar, the 'Help Me Decide' section is highlighted with a yellow box and a '2' in a yellow circle. It contains a sub-header 'Help Me Decide', an image of two people, a text box that says 'Use Help Me Decide to find right tool for your Quoting and Renewal needs.', and a 'Get Started' button with a right-pointing arrow. To the right of the 'Help Me Decide' section are three columns of links: 'Quick Links' (Small Group Renewal Packages, Upload Documents, United eServices (UeS), MyAllSavers, SAM, Product Grids, UHC Benefit Services), 'Fully Insured' (UnitedHealthcare New Business Quoting SAMx, SAM (use for CA, DE, FL, MD, PR, VA, VI, WV), Out of Scope (DC, VT), Oxford New Business Quoting and Renewals, SAMx (CT, NY & NJ), UnitedHealthcare Freedom Renewals, SAMx (NH), UnitedHealthcare Renewal Processing & Packages, SAMx (AL, CT, IL, MN, MT, ND, OK, SD), UnitedHealthcare Renewal Processing - All other states not listed above, SAM, UnitedHealthcare Renewal Packages - All other states not listed above, United eServices (UeS)), and 'Level Funded' (New Business Quoting SAMx - Level Funded, MyAllSavers (VI), Out of Scope (HI, NV - under 50, NY - under 100, VT), Renewals SAMx - 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**.

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

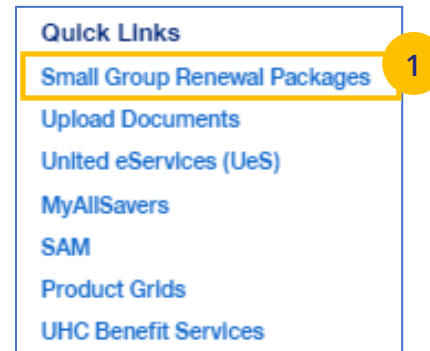


6 | Quick Links: Small Group Renewal Packages

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

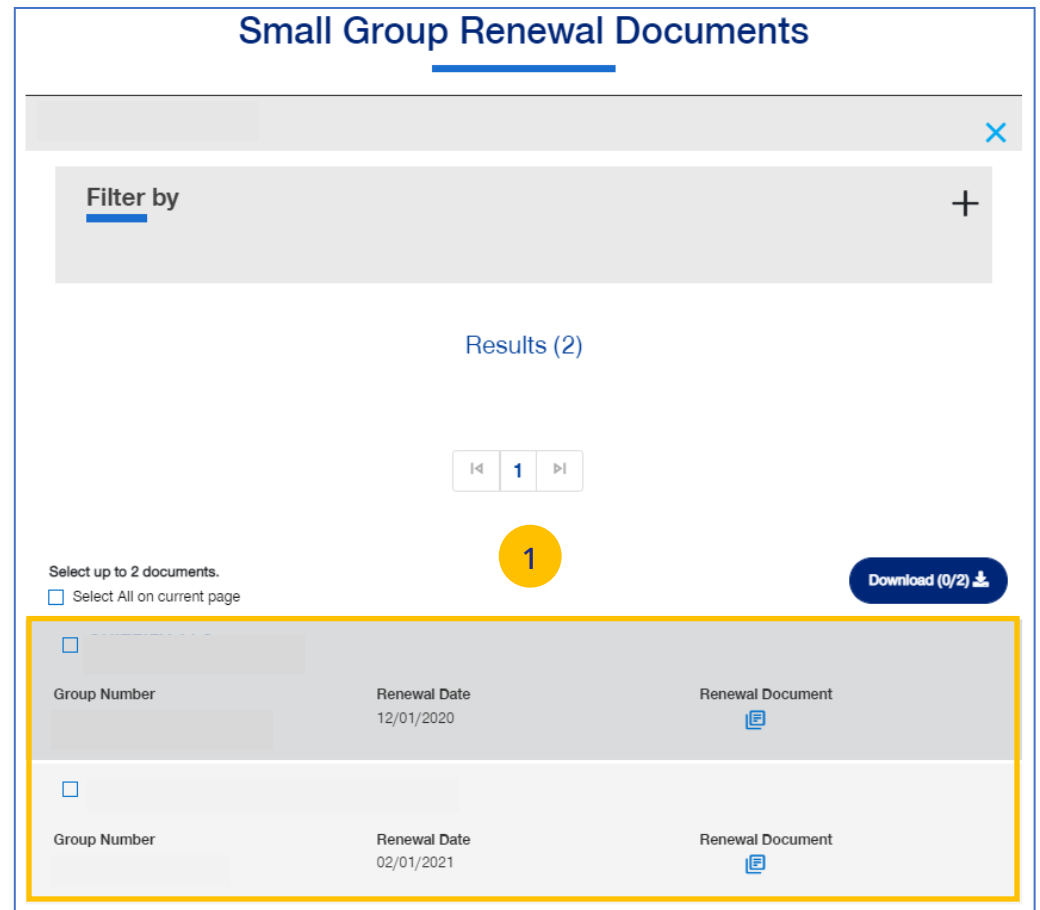
1. Click **Small Group Renewal Packages**. The **Small Group Renewal Documents** screen displays with the groups listed. You can scroll down to view all the groups.

Note: General Agents will see groups eligible for renewal 75 days before the group's renewal date. Non-General Agent brokers will see groups eligible for renewal 72 days before the group's renewal date. Employers will see groups eligible for renewal 60 days before the group's renewal date.



Quick Links

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



Small Group Renewal Documents

Filter by +

Results (2)

1

Select up to 2 documents.
 Select All on current page

Download (0/2)

<input type="checkbox"/>	Group Number	Renewal Date 12/01/2020	Renewal Document
<input type="checkbox"/>	Group Number	Renewal Date 02/01/2021	Renewal Document



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 selection bar 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 area shows a list of renewal packages. The first package is for "1051 MORRIS" with a renewal date of 05/01/2021 and a "Manage Renewal" link. The second package is for "133" with a renewal date of 05/01/2021 and a "Manage Renewal" link. Below the list is a "Filter by" section with a plus sign icon. An expanded "Filter by" menu is shown below, containing a warning "Filtering will reset any selections listed below" and four filter options: "Group Name" (text input), "Group ID" (text input), "Renewal Date" (date selector), and "Writing Agent" (dropdown menu). A "Clear Filter" button is located at the bottom of the filter menu.



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. When you click the **Manage Renewals** link, you will be directed to SAMx.

Note: When you click the **Manage Renewals** link, you will be directed to the specific application based on the renewal carrier. Oxford or Tufts = SAMx Oxford; UHC = SAMx UHC; PRIME = SAM PRIME.

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. Download (0/20)

Select All on current page

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

A yellow circle with the number '2' is placed over the 'Manage Renewal' link in the second row of the table.

UnitedHealthcare

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.

The screenshot illustrates the document upload process in three stages:

- Step 2:** A dropdown menu for "Document Name" is open, showing a list of document types. "Employer Information Form" is highlighted. A yellow circle with the number "2" is next to the dropdown.
- Step 3:** The "Document Name" is set to "1099 Attestation Form". The "Select Document for Upload" field contains a file named "Decision 2.jpg". A yellow circle with the number "3" is next to the file selection area. An "Add Row" button is visible at the bottom right.
- Step 4:** The "Upload" button is clicked. A confirmation message appears: "Document **Decision 2.jpg** successfully uploaded as 1099 ATTESTATION FORM. Document ID: **0902b2da80189d0c**". A yellow circle with the number "4" is next to the confirmation message.



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](#)
- [Product Grids](#)
- [UHC Benefit Services](#)



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.

Quick Links

[Small Group Renewal Packages](#)

[Upload Documents](#)

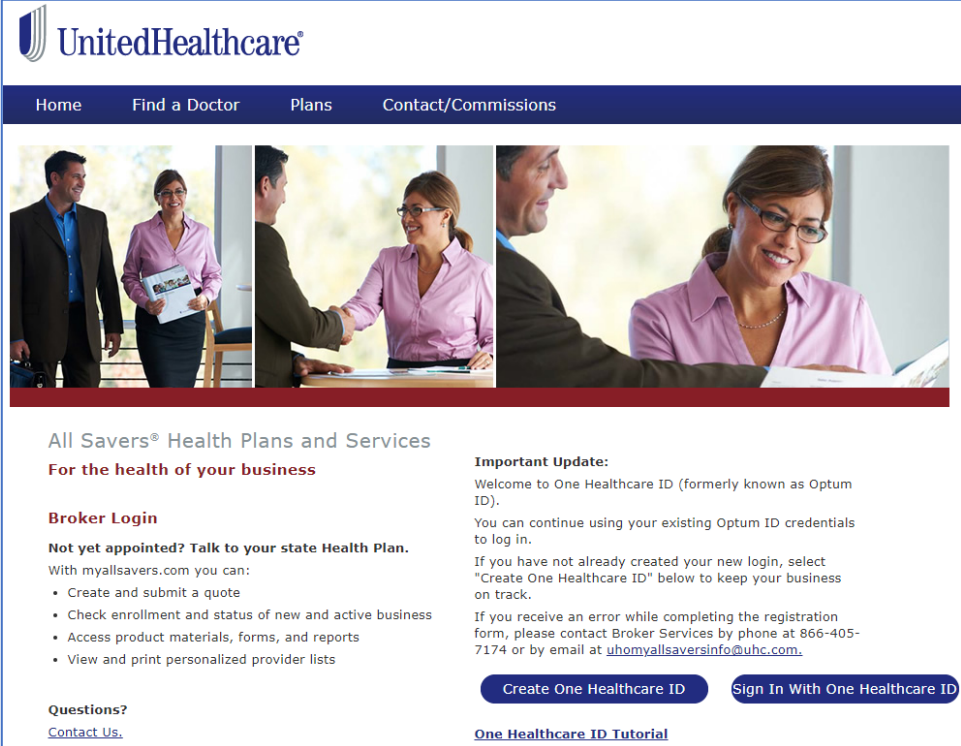
[United eServices \(UeS\)](#)

[MyAllSavers](#)

[SAM](#)

[Product Grids](#)

[UHC Benefit Services](#)



The screenshot shows the UnitedHealthcare website interface. At the top left is the UnitedHealthcare logo. Below it is a dark blue navigation bar with links for Home, Find a Doctor, Plans, and Contact/Commissions. A large banner image features three business professionals in a meeting. Below the banner, the main content area is titled "All Savers® Health Plans and Services" with the subtitle "For the health of your business". There are three columns of text: "Broker Login" with a "Not yet appointed? Talk to your state Health Plan." note and a list of actions; "Important Update:" regarding the transition to One Healthcare ID; and "Questions?" with a "Contact Us." link. At the bottom right, there are two buttons: "Create One Healthcare ID" and "Sign In With One Healthcare ID", and a link to "One Healthcare ID Tutorial".

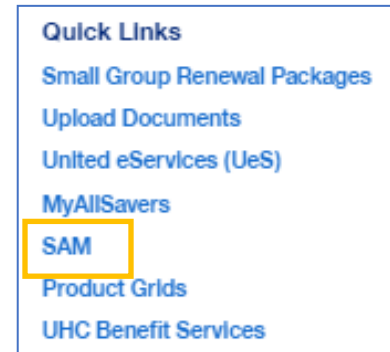


6 | Quick Links: SAM

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 displays.
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**.

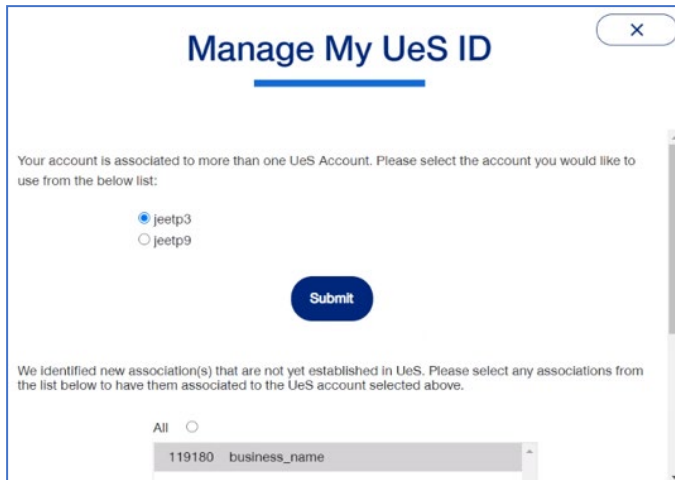



6 | Quick Links: Product Grids

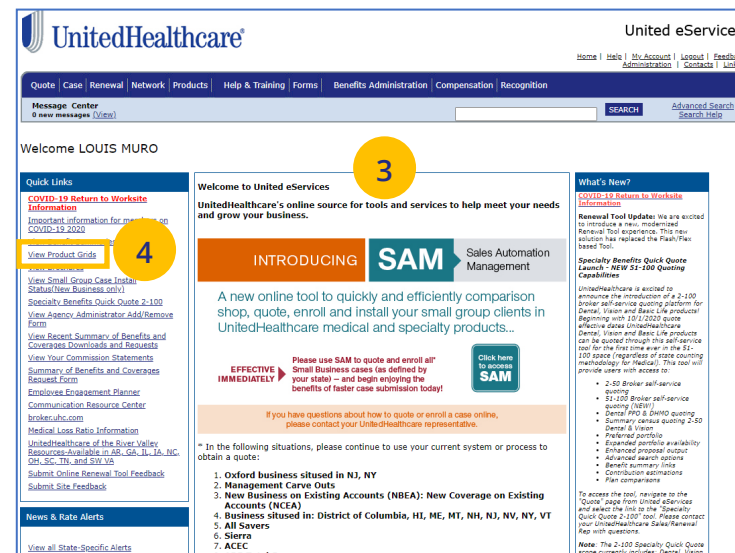
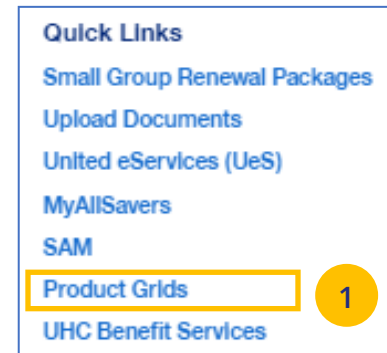
The **Product Grids** link allows you to access UeS to view marketing materials used at the state level that show available products and other related materials.

1. Click the **Product Grids** link. The **United eServices** sign on screen displays.
2. Enter your UeS **Username** and **Password**.
3. Click **Submit**. The UeS Home Page displays.

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**.



4. Click the **View Product Grids** link on the UeS home page.



6 | Quick Links: UHC Benefit Services

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

1. Click the **UHC Benefit Services** link. The **Billing Services Account Access** sign on screen displays.
2. Enter your UeS **Username** and **Password** or you can sign on with your **One Healthcare ID**. The **Billing Services Account Screen** displays.

Quick Links

[Small Group Renewal Packages](#)

[Upload Documents](#)

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

[MyAllSavers](#)

[SAM](#)

[Product Grids](#)

[UHC Benefit Services](#)

1



1

Important Notice: To further ensure the safety and privacy of our clients, we have launched a new login experience for non-member users accessing our web portal. It is now required for UHC employees, brokers and business partners to transition from their existing login credentials to One Healthcare ID. Please proceed to the right-side menu of this page, below "LOGIN", click "One Healthcare ID" to complete the process.

Consumers

Billing Services:

- Look up Coverages, Billings & Payments, Dependents
- Download Forms
- Update Account Information
- cobra_kyoperations@uhc.com

Reimbursement Services:

Visit member.uhcbs.com to manage your account

- View Account Balances
- Submit Claims Electronically
- Enroll in Direct Deposit
- Use the [FSA Tax Savings Calculator](#)
- custservice@uhcservices.com

Administrators

Billing Services:

- Look up Participant Information
- Submit Qualifying Events
- Run Reports
- Export Eligibility Data
- Download Forms & Sample Files
- cobra@uhcservices.com (100 or fewer employees)
- cobra_kyoperations@uhc.com (over 100 employees)

Reimbursement Services:

Visit employer.uhcbs.com to manage your account

- Access Reimbursement Resources
- Run Reports
- Manage Participants
- cac@uhcservices.com



3

Billing Services Account Access

User Name

[Forgot your User Name?](#)

Password

[Forgot your Password?](#) / [Register](#)

LOGIN

OR

Login using

One Healthcare ID

Note: As part of our efforts to further protect and secure information, we are adding an additional authentication step for all online access. This will be done by creating a One Healthcare ID.

 All Employer group contacts and broker contacts are required to login using a One Healthcare ID.

 If you do not have one, click "One Healthcare ID" and you will be guided to create one for ongoing use.

 If you already have a One Healthcare ID for [Employer eServices](#), please use those same log in credentials here.

[Language Assistance/Non-Discrimination Notice](#)

[Accessibility for Individuals with Disabilities](#)

[Asistencia de Idiomas / Aviso de no Discriminación](#)

[語言協助 / 不歧視通知](#)


[Register Now](#)

[Site Tour](#)



6 | Small Group Quoting & Renewal (SAMx, MyAllSavers)

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

Home	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>Quick Links</p> <ul style="list-style-type: none"> Small Group Renewal Packages Upload Documents United eServices (UeS) MyAllSavers SAM Product Grids UHC Benefit Services 	<p>Fully Insured</p> <ul style="list-style-type: none"> UnitedHealthcare New Business Quoting SAMx (all except for CA, DE, FL, MD, PR, VA, VI, WV) and GA, TX as of 7/1/2022 effective dates SAM (use for CA, DE, FL, MD, PR, VA, VI, WV) 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 (AL, CT, IL, MN, MT, ND, OK, SD) UnitedHealthcare Renewal Processing - All other states not listed above SAM UnitedHealthcare Renewal Packages - All other states not listed above United eServices (UeS) 	<p>Level Funded</p> <ul style="list-style-type: none"> 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") 				



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

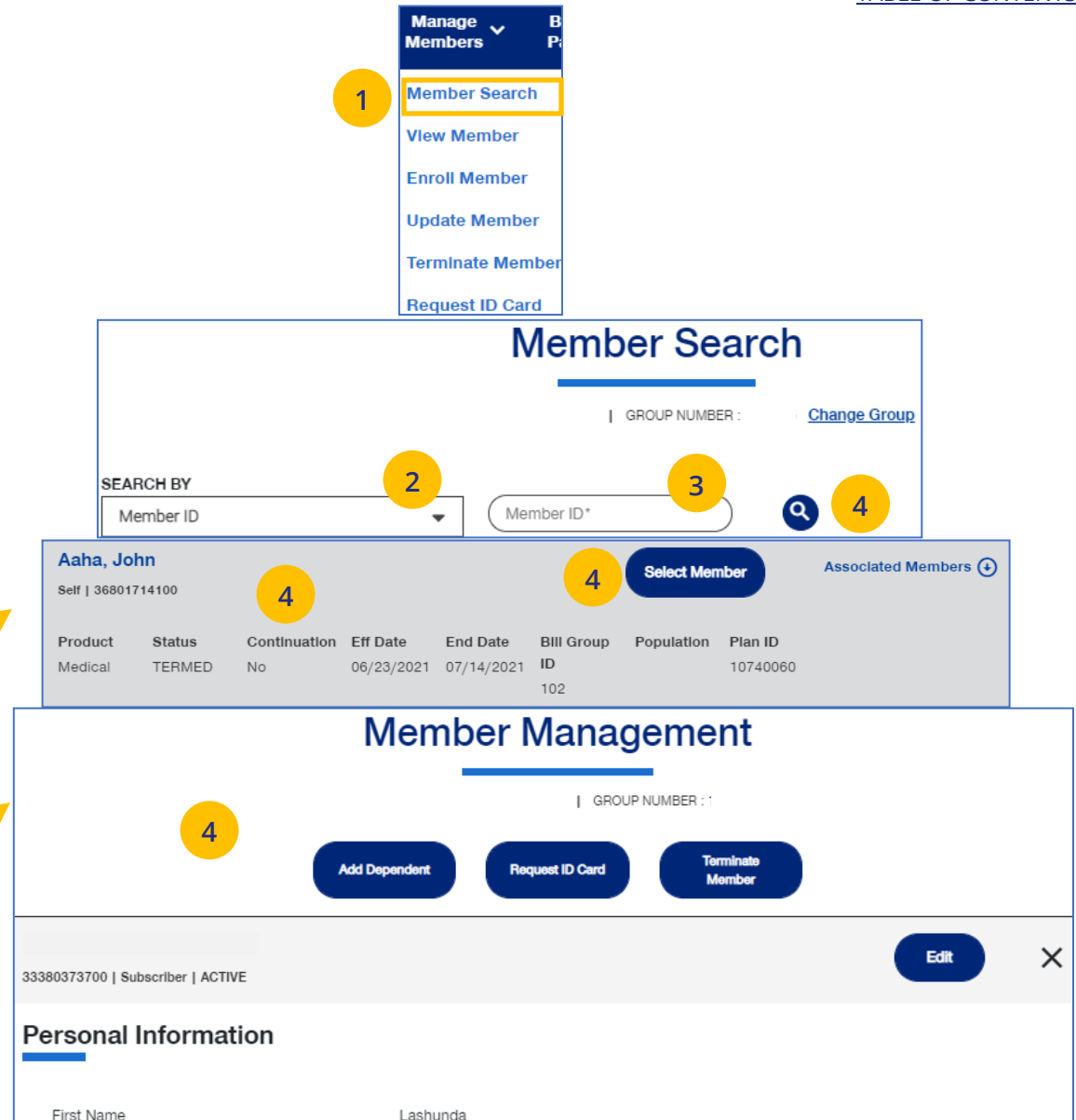
The **Member Search** tab is used to search for a specific member record. You can search for a member using one of the following options:

- 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 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 Member Search process. At the top, a 'Manage Members' dropdown menu is shown with 'Member Search' highlighted (1). Below this is the 'Member Search' screen, which includes a 'SEARCH BY' dropdown menu (2) set to 'Member ID', a search input field (3) containing 'Member ID*', and a search icon (4). The search results show a member card for 'Aaha, John' (Self | 36801714100) with a 'Select Member' button (4). Below the member card 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 is the 'Member Management' screen, which includes buttons for 'Add Dependent', 'Request ID Card', and 'Terminate Member'. A '4' callout points to the 'Member Management' screen. At the bottom, the 'Personal Information' section is visible, showing 'First Name' as 'Lashunda' and an 'Edit' button.




7 | View Member

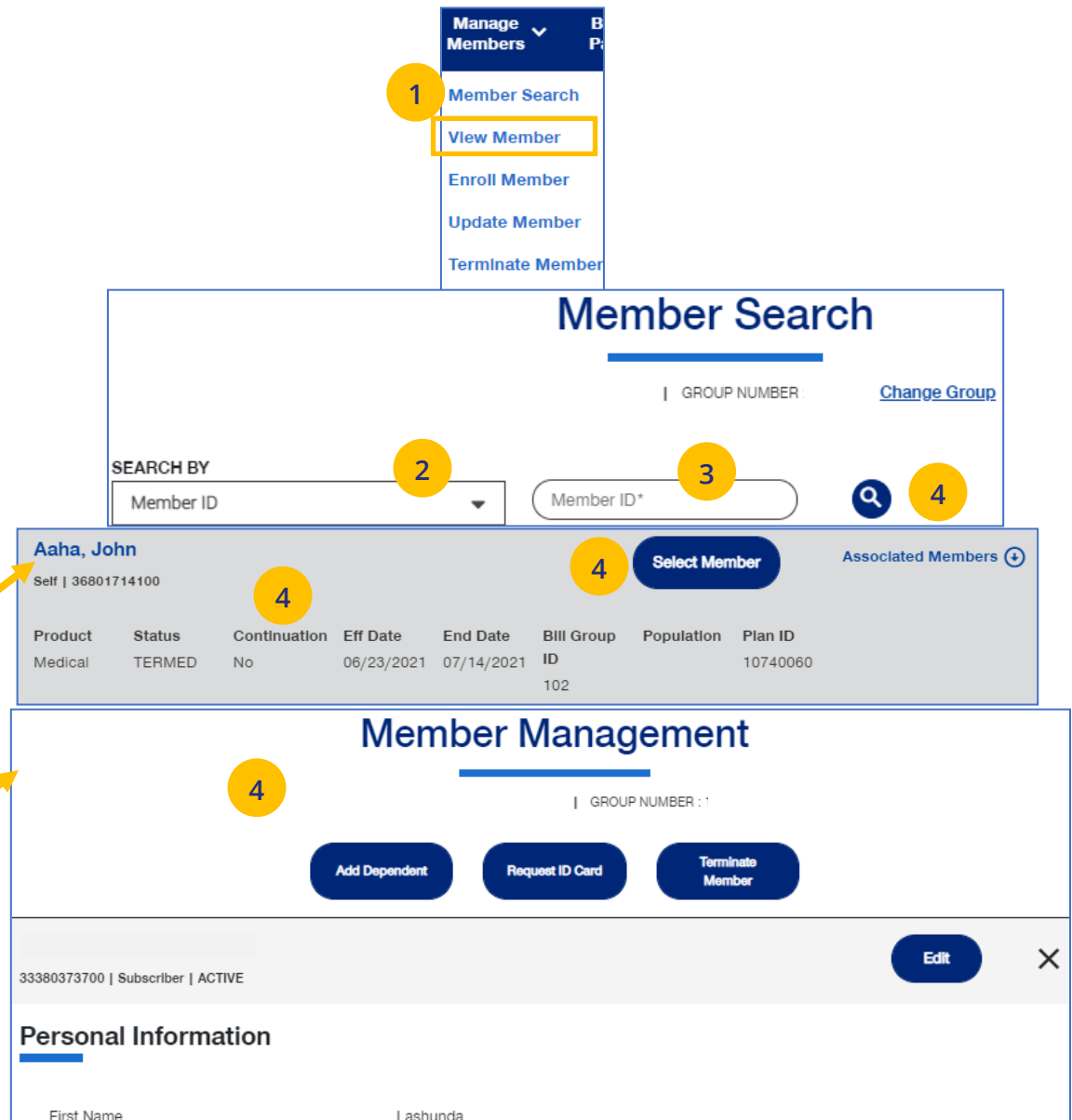
View Member is used to search for a specific member record. You can search for a member using one of the following options:

- 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 a member:

1. Click the **Member Services** tab and select **View 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).



Manage Members ▾

- 1 Member Search
- View Member
- Enroll Member
- Update Member
- Terminate Member


Member Search


GROUP NUMBER [Change Group](#)

SEARCH BY

Member ID

Member ID*



Aaha, John **Select Member** Associated Members 


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

GROUP NUMBER : 1

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

33380373700 | Subscriber | ACTIVE **Edit** 

Personal Information

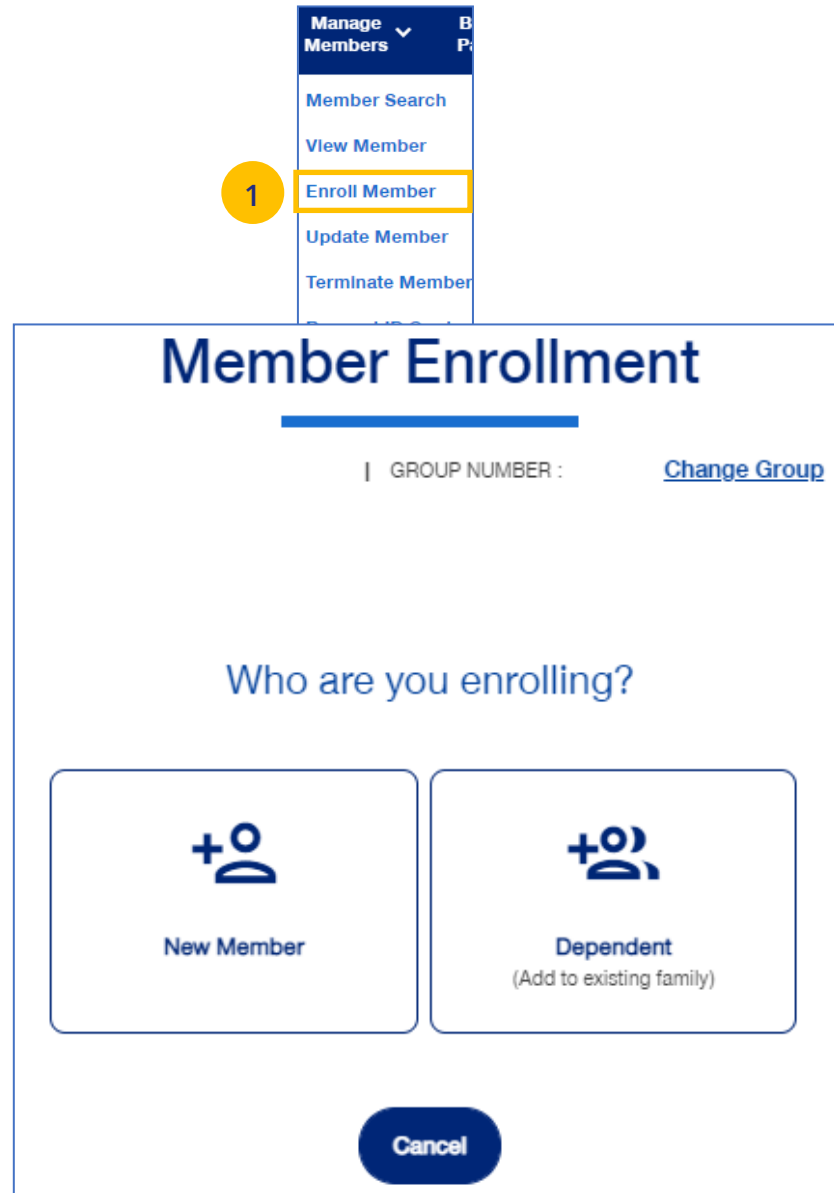
First Name Lashunda



7 | Enroll Member

The **Enroll Member** menu item is used to add a new member or new dependent members to a group.

1. Select **Enroll Member**. The **Member Enrollment** screen displays.



7 | Enroll Member (continued)

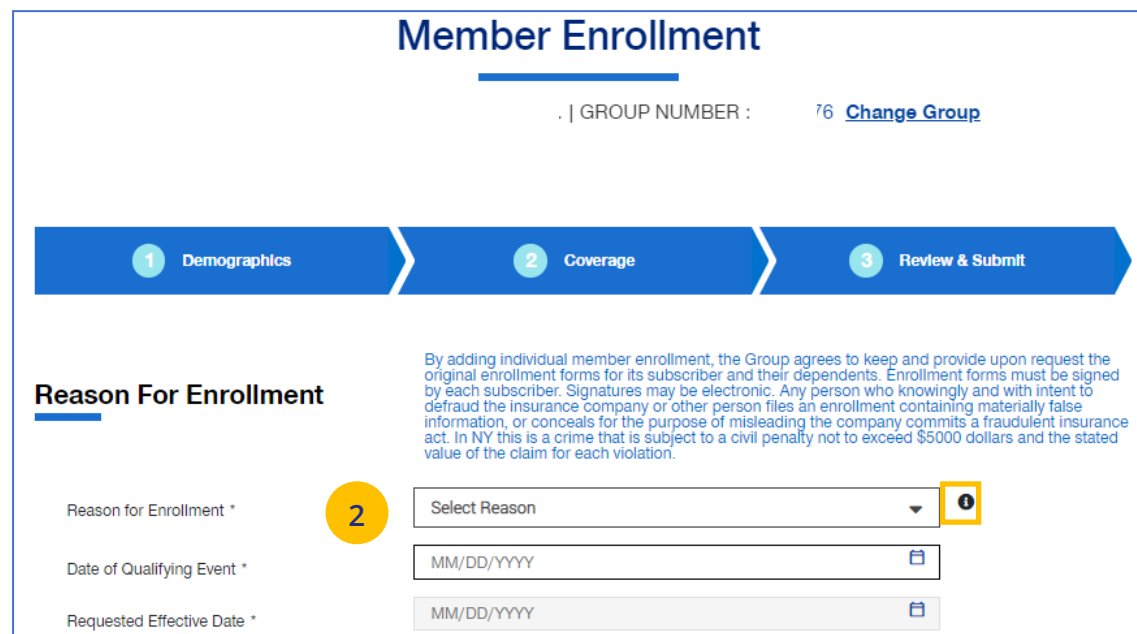
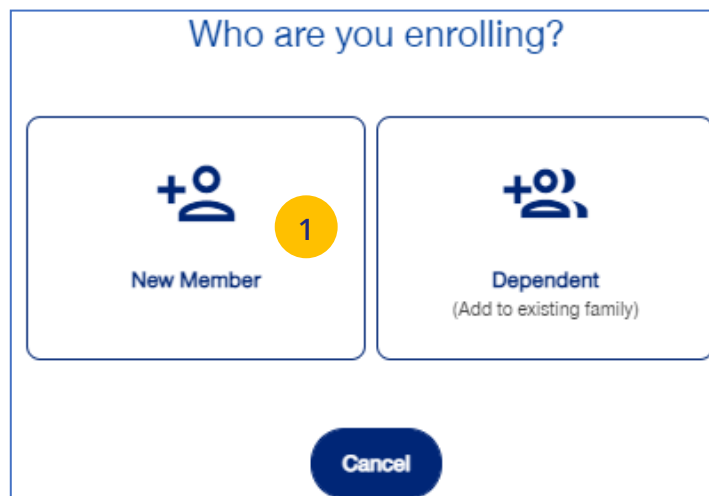
The enroll member process walks you through the **Demographics** and **Coverage** sections, then ask you to **Review & Submit** the new member information.

To enroll a new member:

1. Click the **New Member** box. The **Member Enrollment** detail screen displays.
2. 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.**



7 | Enroll Member (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 *

Requested Effective Date *

3

4

Warning Period Rules

- 1370345 : MILESTONES BEHAVIORAL SERVICES INC.
Coverage will be effective on the first day of the month following 01 month(s) after the date of qualifying event date.



7 | Enroll Member (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**.

Subscriber Information

5

First Name*

Middle Name

Last Name*

Suffix

Birth Date*

Gender*

Social Security Number* OR

Date of Hire*

⚠ 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.

Employment Status

Contact Information

6

Home Address Line 1*

Home Address Line 2

Home Zip Code*

Home City*

Home State*

Home Phone

Work Phone

Mobile Phone

Preferred Phone

Email Address

7



7 | Enroll Member (continued)

3. Enter the **Coverage** information in the **Medical Information, Dental Information** (if applicable) and **Vision Information** (if applicable) areas.

Note: For **UnitedHealthcare HMO**, fields displayed under **Medical Information** will be **Plan, HMO Provider ID** and **Current Patient Indicator**. **Plan** and **HMO Provider ID** are required fields.



Medical Information

Plan* CHL - NSE 0-80/30%/1500DED SG 20

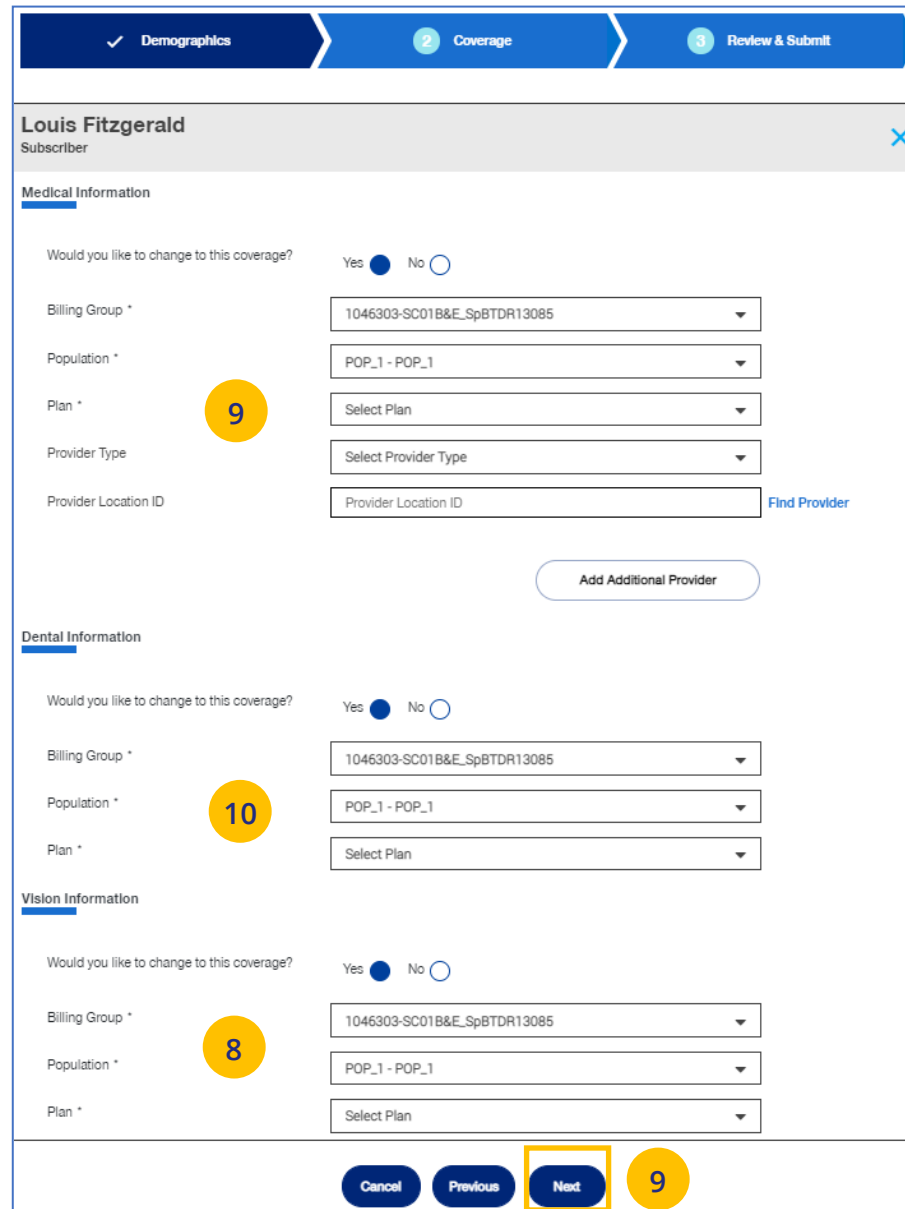
HMO Provider ID * 0284160078 [Find Provider](#)

Current Patient Indicator Yes No

4. Click **Next**.

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

Note: The **Billing Group** and **Population** fields are not available for **UnitedHealthcare HMO** users.



✓ Demographics 2 Coverage 3 Review & Submit

Louis Fitzgerald
Subscriber

Medical Information

Would you like to change to this coverage? Yes No

Billing Group * 1046303-SC01B&E_SpBTDR13085

Population * POP_1 - POP_1

Plan * 9 Select Plan

Provider Type Select Provider Type

Provider Location ID Provider Location ID [Find Provider](#)

[Add Additional Provider](#)

Dental Information

Would you like to change to this coverage? Yes No

Billing Group * 1046303-SC01B&E_SpBTDR13085

Population * 10 POP_1 - POP_1

Plan * Select Plan

Vision Information

Would you like to change to this coverage? Yes No

Billing Group * 1046303-SC01B&E_SpBTDR13085

Population * 8 POP_1 - POP_1

Plan * Select Plan

[Cancel](#) [Previous](#) [Next](#) 9



7 | Enroll Member (continued)

5. Review the information.

- If you need to edit any of the information shown, click the **Edit** button.
- If all the information is correct, scroll down and click **Submit**. A confirmation message displays telling you that **“Member Enrollment is successful.”**

✓ Demographics ✓ Coverage 3 Review & Submit

Reason For Enrollment

11 Edit

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

Vision Information

Billing Group	1046303 - SC01B&E_SpBTDR13085
Population	POP_1 - POP_1
Plan	10252826 - Plan Option 10252826

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.

Submit 11




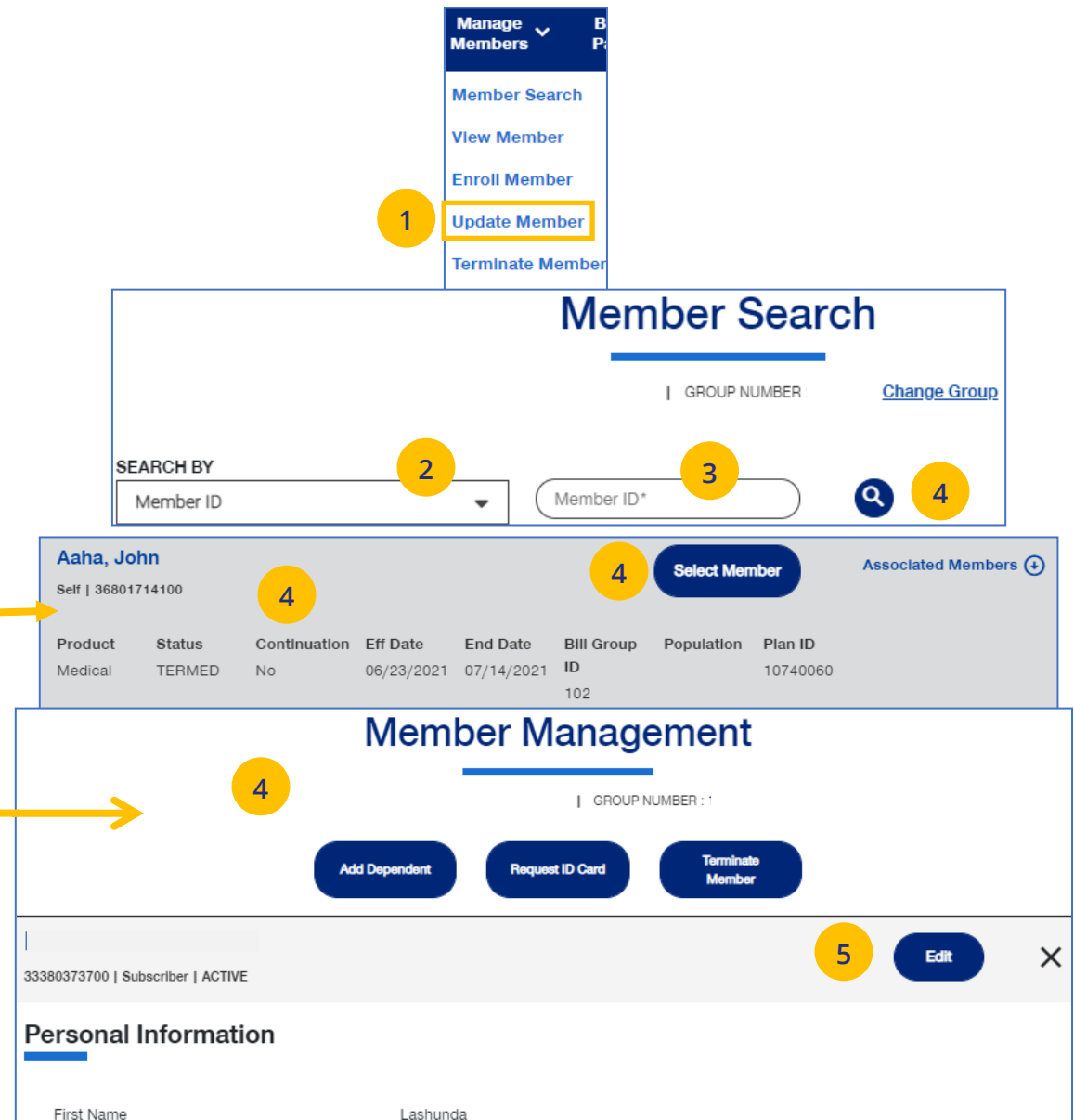
7 | Update Member

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 ▾

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

Member Search

GROUP NUMBER [Change Group](#)

SEARCH BY: Member ID (2)

Member ID* (3)  (4)

Aaha, John (4) **Select Member** (4) [Associated Members](#) (4)


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

GROUP NUMBER : 1

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

33380373700 | Subscriber | ACTIVE (5) **Edit** (5) 

Personal Information

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

First Name * Louis

Middle Name Middle Name

Last Name * Dylan

Suffix Select Suffix

Birth Date * 06/16/1992

Gender * Male

Social Security Number * XXX-XX-XXXX OR Refusal To Provide

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.

- 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.

The screenshot shows the 'Member Update' interface. At the top, there is a title 'Member Update' and a 'GROUP NUMBER' field. Below this is a progress bar with three steps: 'Demographics' (checked), 'Coverage' (selected), and 'Review & Submit'. A green message 'Updates saved successfully.' is displayed. The main content area shows the subscriber's name 'Louis Dylan' and 'Subscriber | FUTURE'. The 'Coverage Effective Date' section is highlighted with a yellow circle '8'. It includes a 'Requested Effective Date' field with a calendar icon and a placeholder 'MM/DD/YYYY'. Below this is the 'Medical Information' section, which includes a question 'Would you like to change to this coverage?' with radio buttons for 'Yes' and 'No' (the 'No' button is selected).

This screenshot shows the bottom part of the form. It features three buttons: 'Cancel or Exit', 'Previous', and 'Save & Continue' (highlighted with a yellow circle '9'). Below these is a 'Submit' button (highlighted with a yellow circle '10') and a light blue success message box that says 'Changes submitted successfully.' with a person icon and a checkmark.




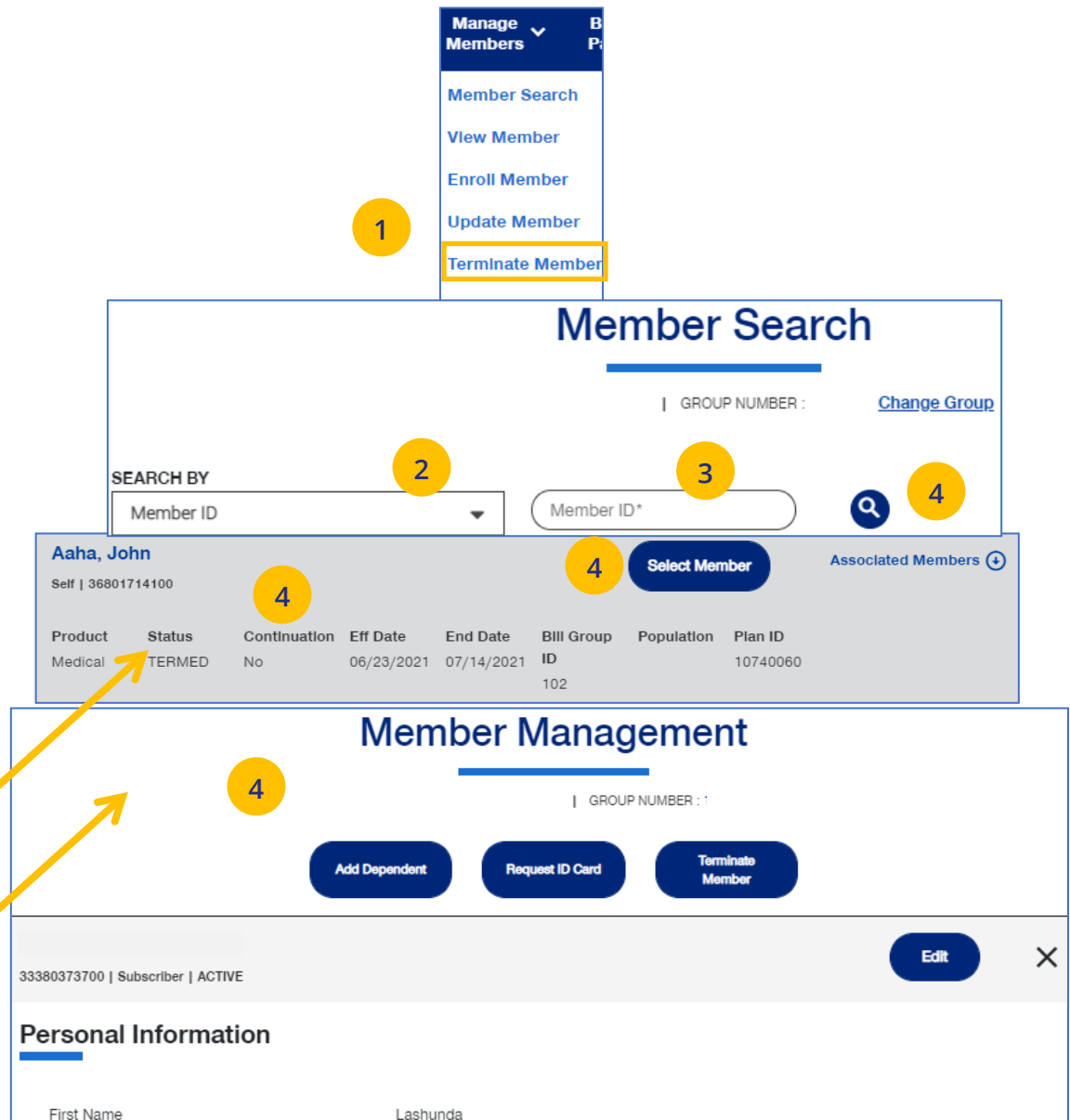
7 | Terminate a Member's Coverage

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 the 'Manage Members' dropdown menu with 'Terminate Member' highlighted (1). The 'Member Search' screen features a 'SEARCH BY' dropdown set to 'Member ID' (2), a search input field containing 'Member ID*' (3), and a search icon (4). Below the search results, a card for 'Aaha, John' is shown with a 'Select Member' button (4). The 'Member Management' screen for 'Aaha, John' displays a table of member details and buttons for 'Add Dependent', 'Request ID Card', and 'Terminate Member'. A detailed view of the member's 'Personal Information' is also shown, including the first name 'Lashunda'.

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



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



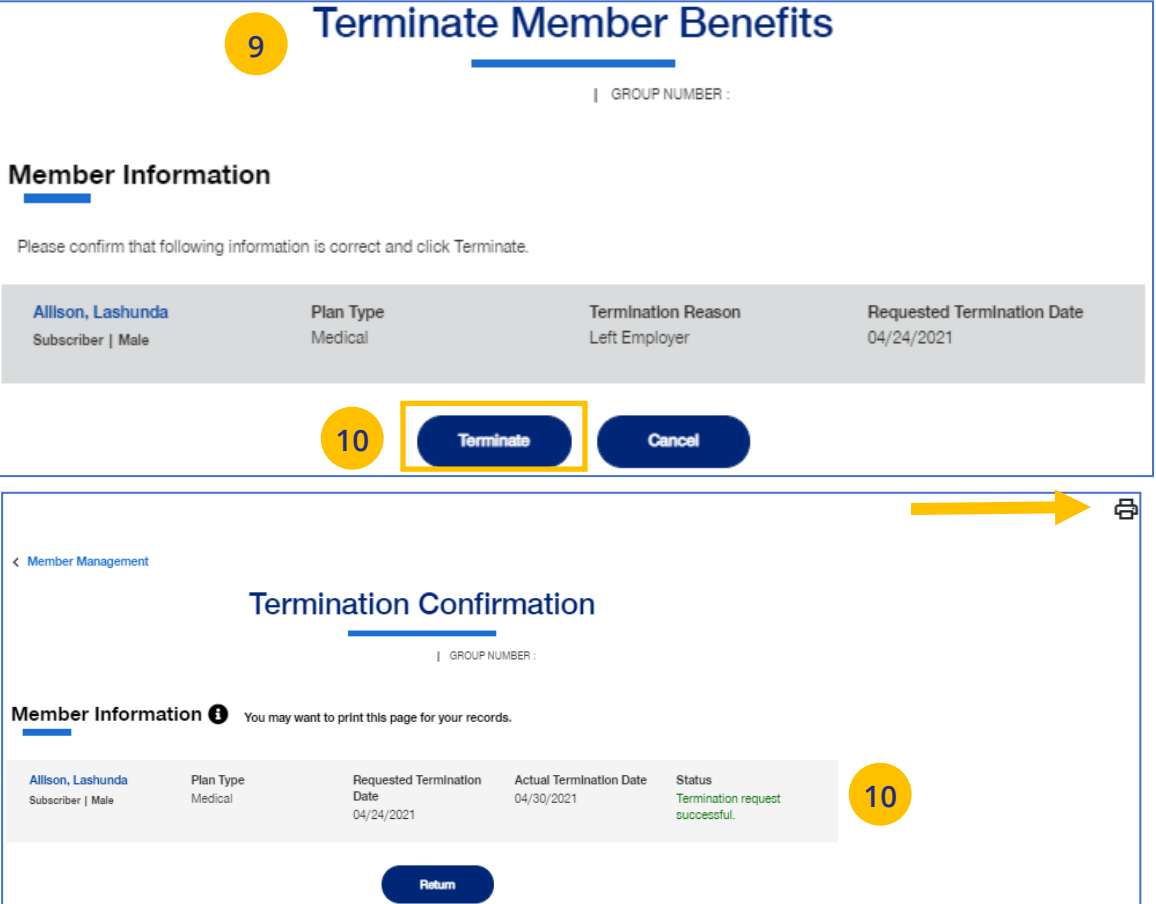
7 | Terminate a Member's Coverage (continued)

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 and UHC Employee access to the Group is no longer available from the uhceservices.com website (as of the Group termination date).



The image shows two screenshots of a web application interface. The top screenshot is titled "Terminate Member Benefits" and features a yellow circle with the number "9" in the top left corner. Below the title is a "GROUP NUMBER:" field. Underneath is a "Member Information" section with a sub-header and a confirmation prompt: "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 section 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 corner. It has a "GROUP NUMBER:" field and a "Member Information" section with an information icon and the text "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 section is a "Return" button. A yellow arrow points to a print icon in the top right corner of the screenshot.




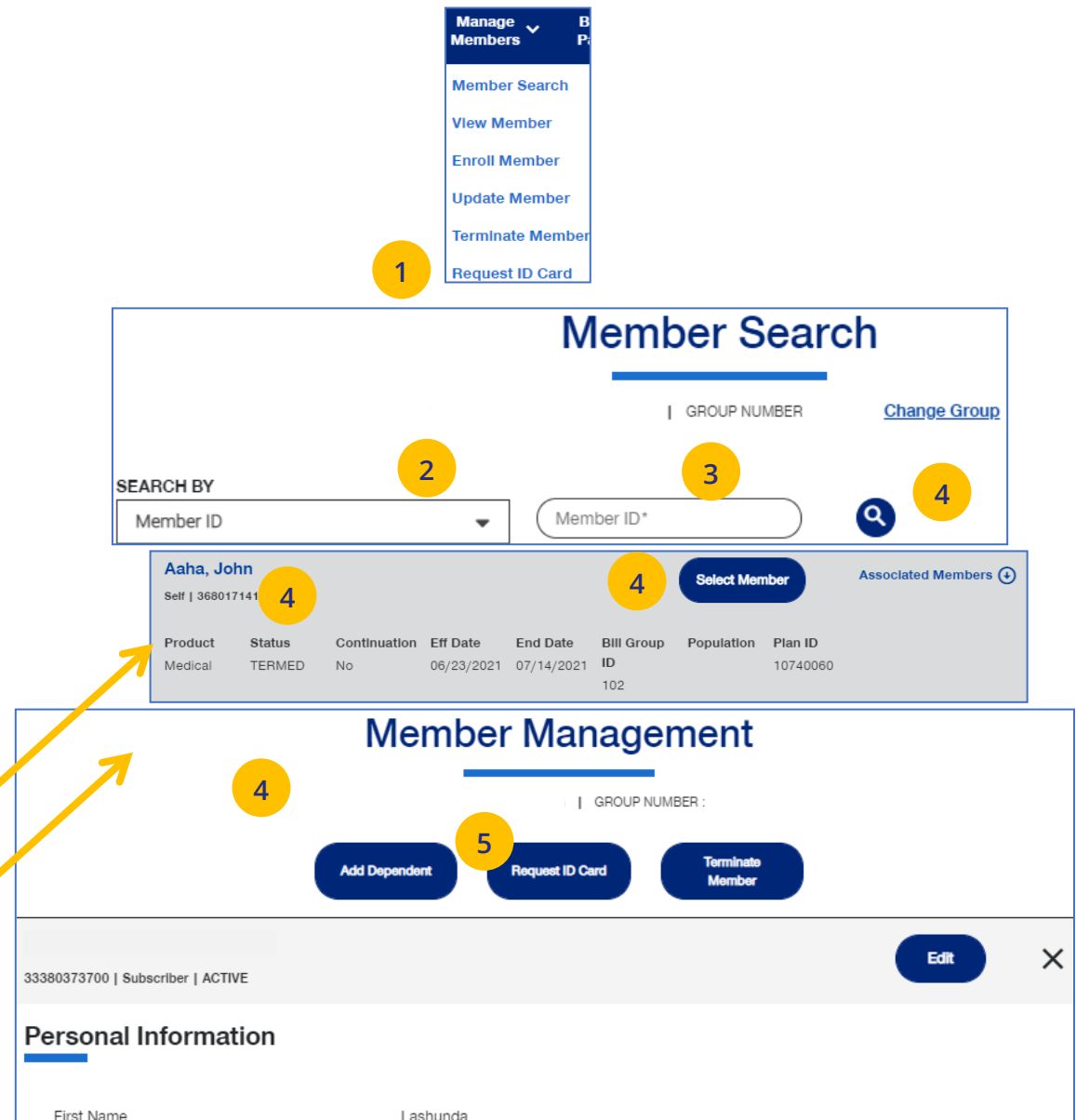
7 | Request a Health Plan ID Card

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.
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 'Manage Members' dropdown menu with 'Request ID Card' selected (1). Below is the 'Member Search' screen with 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 member card for 'Aaha, John' is displayed with a 'Select Member' button (4). Below this is a table of member details:

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 is the 'Member Management' screen with buttons for 'Add Dependent', 'Request ID Card' (5), and 'Terminate Member'. At the bottom, the 'Personal Information' section shows '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: Only **Medical ID Cards** are available for **UnitedHealthcare HMO** users.

Request ID Card

The following ID card options are available. Select one or more options below. Mailed ID Cards will arrive in 7-10 business days.

Note: Member ID cards will be automatically mailed to members after an enrollment or plan change.

<input type="radio"/>	TermedSameAddr bbb Child - DOB 03/01/2005	Current Coverage Start 03/01/2022
<input type="radio"/>	kyle barnes Subscriber - DOB 01/01/2000	Future Coverage Start 05/01/2022
<input type="radio"/>	Mememe Yayayarr Child - DOB 01/09/2022	Future Coverage Start 05/01/2022

Print ID Card Image **6** **Mail ID Card**

John Doe
Subscriber

Jane Doe
Spouse

Jonathan Doe
Child

Janet Doe
Child

Jack Doe
Child

Print Medical ID Card **Order Medical ID Card** **6**


Request sent successfully

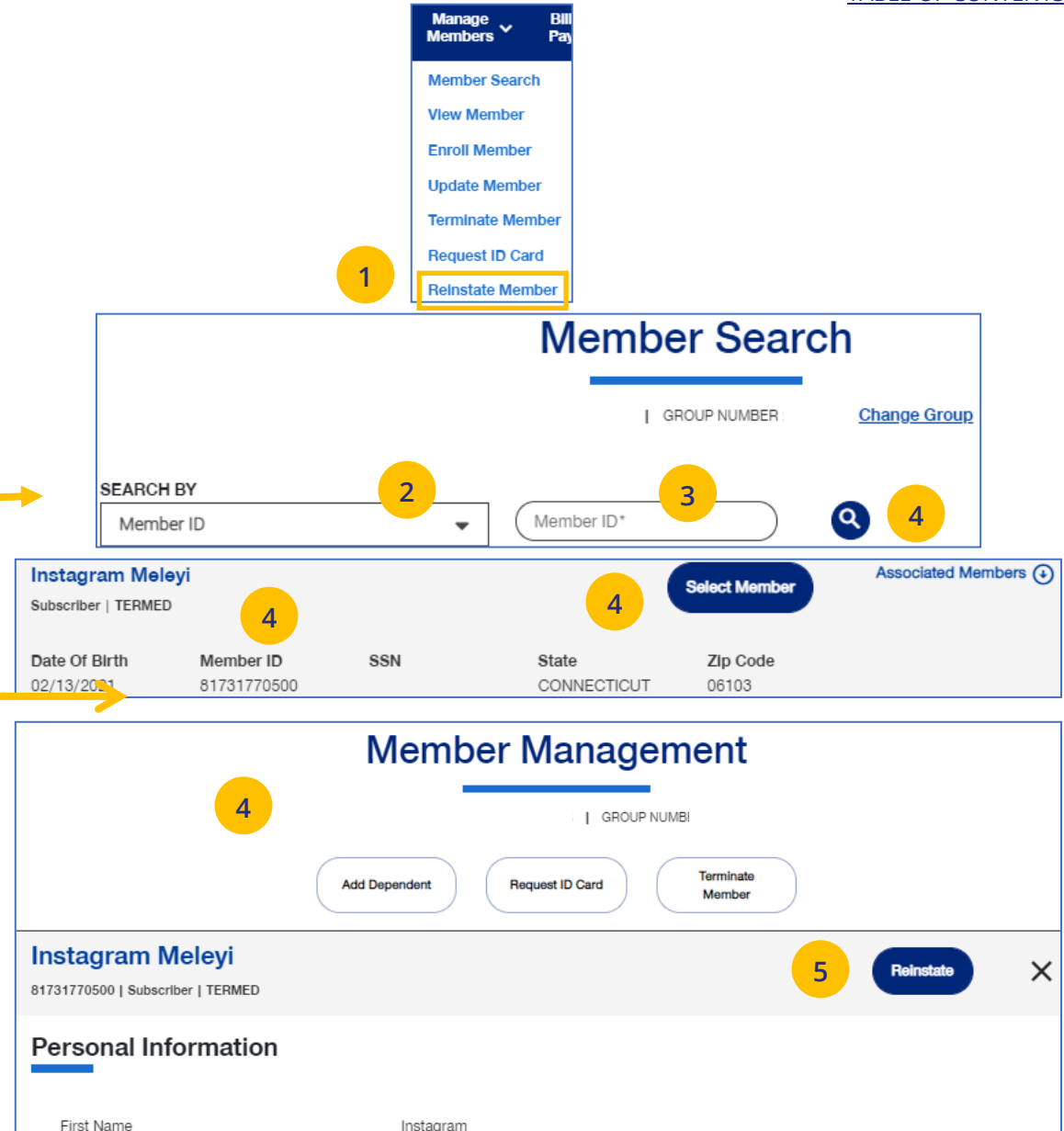


7 | Reinstate Member

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: This section is titled "Member Search" and includes a "GROUP NUMBER" field with a "Change Group" link. The "SEARCH BY" dropdown menu is set to "Member ID" (callout 2). A search input field contains "Member ID*" (callout 3), and a search icon (callout 4) is located to its right. A "Manage Members" dropdown menu is open at the top, with "Reinstate Member" highlighted (callout 1).

Member Management: This section is titled "Member Management" and includes a "GROUP NUMBER" field. It features three buttons: "Add Dependent", "Request ID Card", and "Terminate Member". Below this, a member card for "Instagram Meleyi" is displayed, showing "Subscriber | TERMED" status (callout 4), a "Select Member" button (callout 4), and "Associated Members" link. The card also lists personal information: Date Of Birth (02/13/2031), Member ID (81731770500), SSN, State (CONNECTICUT), and Zip Code (06103).

Below the member card, the "Member Management" screen shows the member's name "Instagram Meleyi" (callout 4), ID "81731770500 | Subscriber | TERMED", and a "Reinstate" button (callout 5) with a close icon (X).

The "Personal Information" section is partially visible at the bottom, showing the "First Name" field with the value "Instagram".



7 | Reinstate Member (continued)

- Update the needed information for the reinstatement in the **Demographics** sections: **Reason for Enrollment, Subscriber Information, Contact Information, Dependent** and **Contact Information**. 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 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.

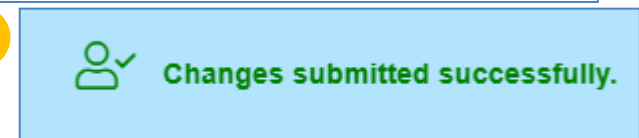
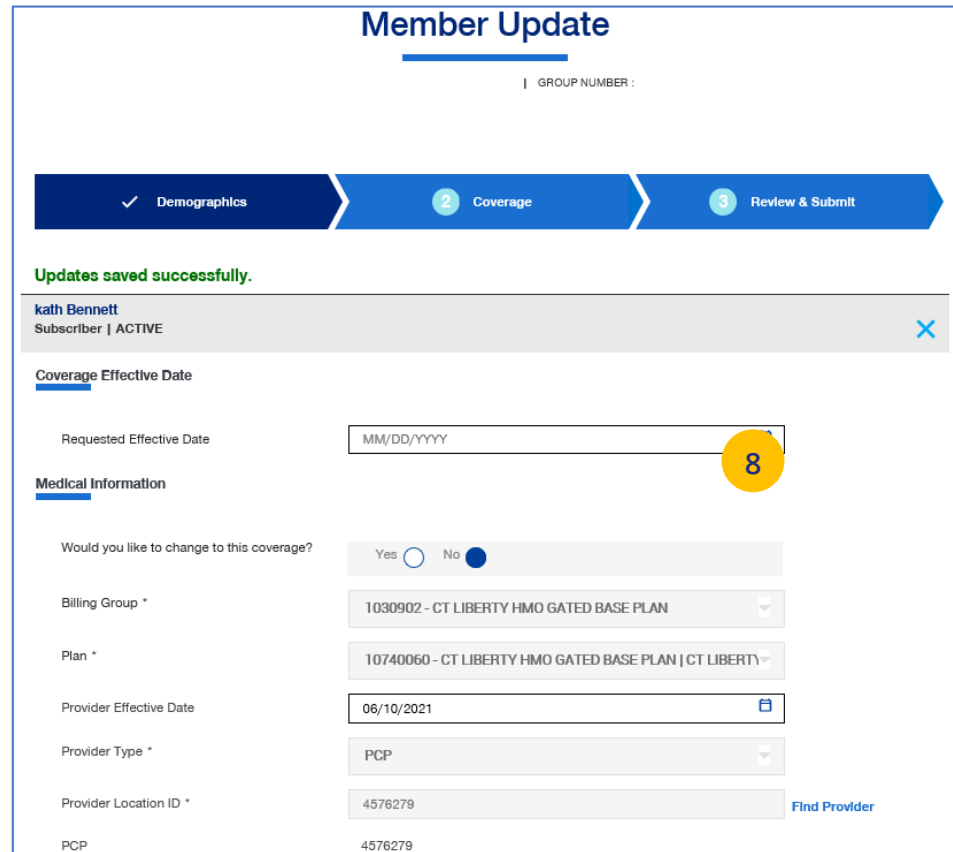


Note: Billing Group – For **UnitedHealthcare HMO** users, Billing Group is not available.

- 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.

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.



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.

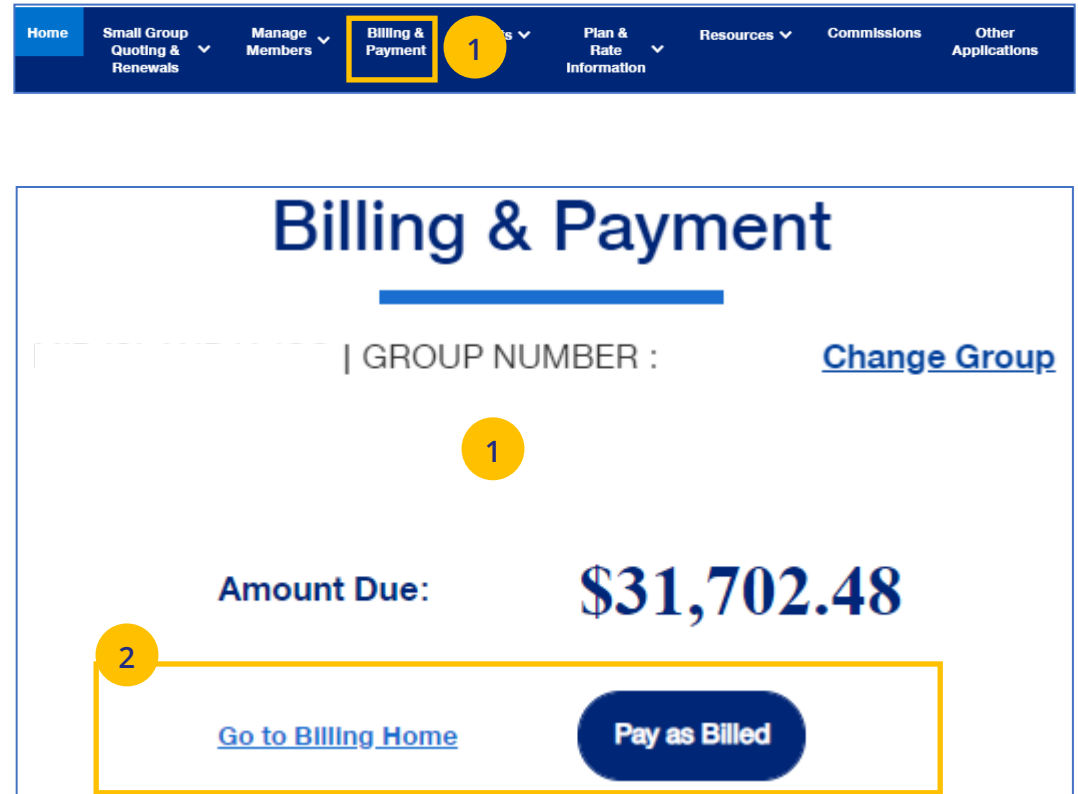


Billing & Payment

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](#)



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

Billing & Payment

| GROUP NUMBER : [Change Group](#)

1

Amount Due: \$31,702.48

2

[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 'Amount Due: \$31,702.48' and a 'Payment Method' dropdown menu set to 'Operating'. There is an 'Add Payment Method' link below the dropdown. The 'Date' field is set to '06/06/2022'. 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. The top navigation bar includes 'Home', 'Small Group Quoting & Renewals', 'Manage Members', 'Billing & Payment' (highlighted with a yellow box and a '1' in a yellow circle), 'Plans', 'Plan & Rate Information', 'Resources', 'Commissions', and 'Other Applications'. The main content area displays 'Billing & Payment' for 'MID ISLAND Y JCC | GROUP NUMBER : 1373201' with a 'Change Group' link. The 'Amount Due' is '\$31,702.48'. Below this, there is a 'Go to Billing Home' button (highlighted with a yellow box and a '2' in a yellow circle) and a 'Pay as Billed' button. Below the main content is an 'Account Summary' section with details like 'Last Payment Rec'd', 'Next Payment Due Date', and 'Current Balance'. It also includes an 'Open Invoice Listing' section with a table of invoices and an 'Aging' section showing a table of aging amounts.

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

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

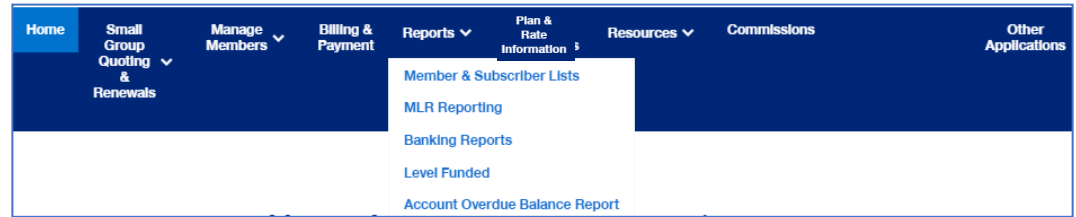


9 | Reports

You can use the **Reports** tab to generate specific reports including:

- **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.
- **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.
- **Account Overdue Balance Report** reports show groups with (1) late payments, or (2) terminations due to lack of payment.

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.

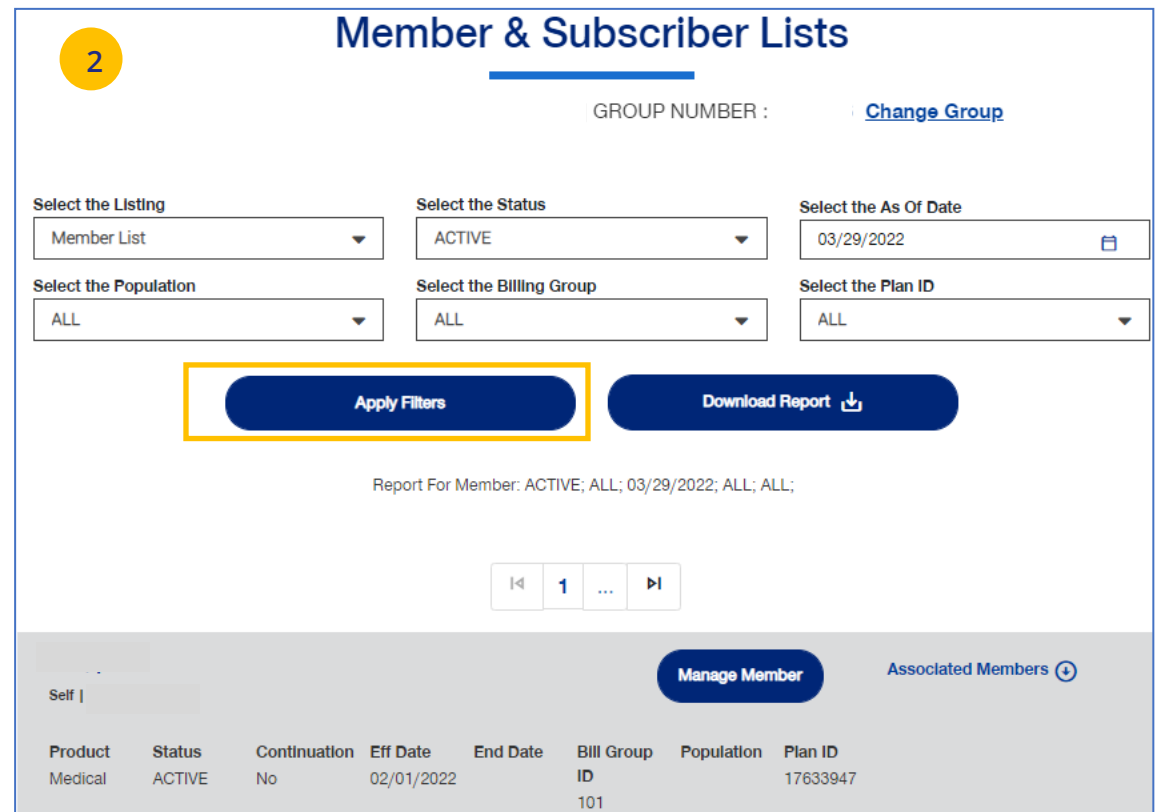
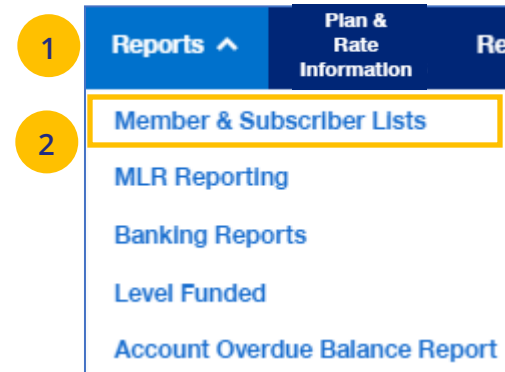
Note: Member List is the default and the default report will be shown when the screen displays. Just scroll down to view members in the report who met the default search criteria.

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 Complete, All Excluding Complete, Active, Pending, Termed, 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 displays the United Healthcare Message Center interface. At the top, the United Healthcare logo is on the left, and a notification bell icon with a '2' badge is highlighted with a yellow box and a '4' callout. The user profile 'Laura Igna... Stage ENV' and a settings gear icon are on the right. The main heading is 'Message Center'. Below it, a 'SORT BY:' dropdown menu is set to 'Date Descending', and a 'Delete Selected' button is visible. A pagination control shows '1' of 1 items. A table lists one message with columns for 'Date/Time', 'From', and 'Subject'. The message details are expanded, showing a 'Date/Time' of '2021-03-01 09:09:15.0', 'From' as 'SYSTEM', and 'Subject' as 'Member Subscriber List'. The 'Attachments and Links' section contains a link to 'MembersListReport.xlsx', which is highlighted with a yellow box and a '6' callout. A plus sign icon in the bottom right of the message list is highlighted with a yellow box and a '5' callout.

Date/Time	From	Subject
2021-03-01 09:09:15.0	SYSTEM	Member Subscriber List

To: Ignacio2
From: SYSTEM
Date: 2021-03-01 09:09:15.0
Message Expiration Date: 2021-06-01 09:09:17.0
Subject: Member Subscriber List
Attachments and Links: [MembersListReport.xlsx](#)
Message:



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.

A screenshot of a navigation menu. The 'Reports' tab is selected and highlighted with a yellow circle '1'. The dropdown menu is open, and 'MLR Reporting' is highlighted with a yellow box and a yellow circle '2'. Other options in the menu include 'Member & Subscriber Lists', 'Banking Reports', 'Level Funded', and 'Account Overdue Balance Report'. The 'Plan & Rate Information' tab is also visible.

A screenshot of the 'MLR Reporting' screen. The title 'MLR Reporting' is at the top, with a 'Change Broker' link below it. There are two buttons: 'Export as PDF' (highlighted with a yellow circle '3') and 'Export as Excel'. Below the buttons is a pagination control showing '1' of 1 pages. A table of data is displayed at the bottom, with a yellow circle '2' highlighting the 'Aggregate Rebate Amount Owed' column.

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 | 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. Click the **Banking Reports** tab. The **Banking Reports** window displays with the Daily, Monthly and Historical Banking reports.
3. Click the **File Link** to view the report.

The screenshot shows the 'Banking Reports' interface. At the top, a navigation menu has 'Reports' (callout 1) selected, which has opened a dropdown menu. In this menu, 'Banking Reports' (callout 2) is highlighted with a yellow box. Below the navigation, the main content area is titled 'Banking Reports' and includes a 'GROUP NUMBER' field and a 'Change Group' link. A callout 2 points to the 'To view a banking report, Select from the report listed below.' instruction. The main content area is divided into three sections: 'Daily Banking Reports', 'Monthly Banking Reports', and 'Historical Banking Reports'. The 'Daily Banking Reports' section contains a table with two rows of reports. The first row is 'Charge Claim Activity' (Last Updated: 2020-12-14) with a 'File Link' icon (callout 3). The second row is 'Funding Advice' (Last Updated: 2020-12-08) with a 'File Link' icon. The 'Monthly Banking Reports' section shows 'No reports found'. The 'Historical Banking Reports' section is currently empty. At the bottom, there are filters for 'Select the Report *' (set to 'Aged Outstanding') and 'Select the Date Range' (set to '12/14/2020 - 12/14/2020'), followed by an 'Apply' button.

Daily Report Name	Last Updated	File Link
Charge Claim Activity	2020-12-14	
Funding Advice	2020-12-08	



9 | Banking Reports (continued)

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.

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



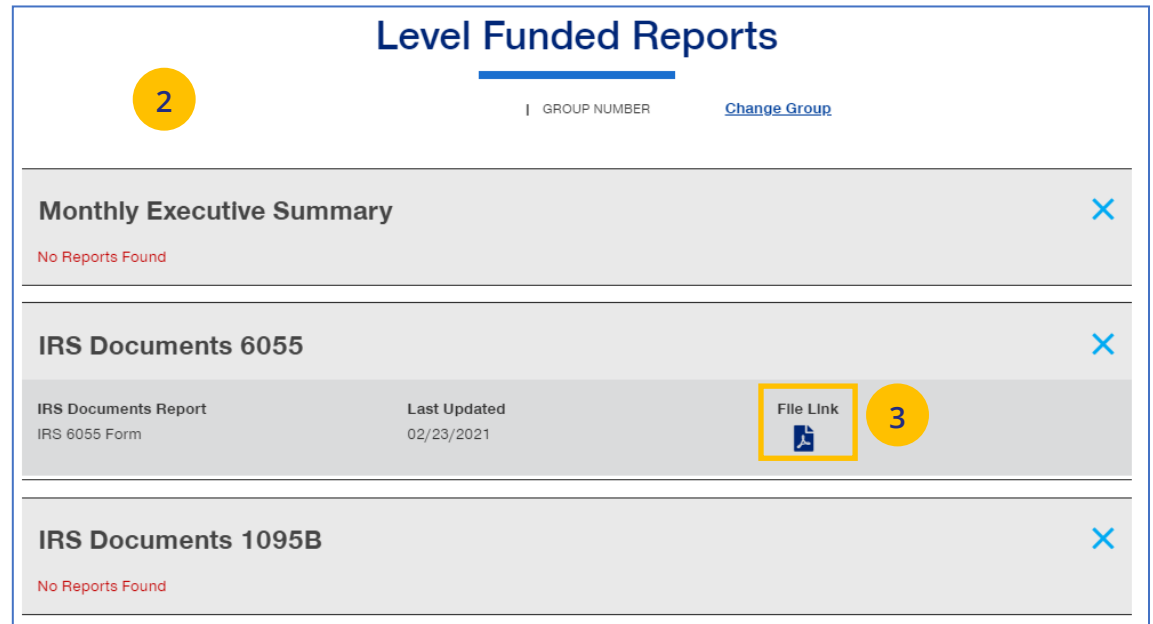
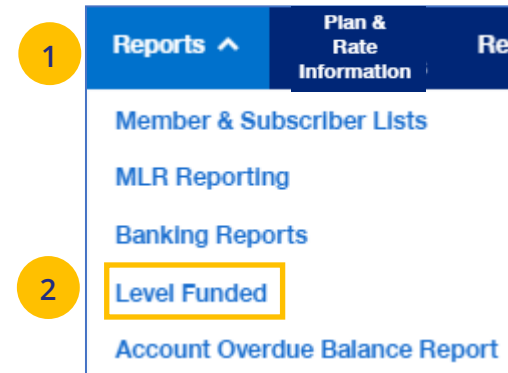
9 | Level Funded

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

Note: This report is for Level Funded groups only. The Monthly Executive Report will not display for groups with 0-4 members.

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

1. Click the **Reports** tab.
2. Select **Level Funded**. The **Level Funded Reports** window displays with the available reports for level Funded groups.
3. Click the specific **File Link** to view the report you need.



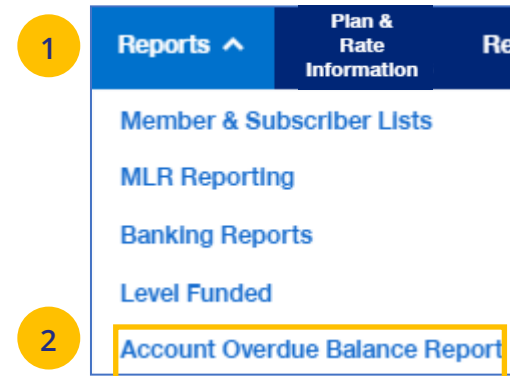
9 | Account Overdue Balance Report

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**.

[TABLE OF CONTENTS](#)



A screenshot of the 'Account Overdue Balance Report' form. The title 'Account Overdue Balance Report' is centered at the top. Below the title, a message states: 'This report will not contain Account Balance information for UnitedHealthcare HMO Groups.' Below this message, there are two dropdown menus. The first is labeled 'Select the report type' and has 'Late Groups' selected. The second is labeled 'Report Date' and is empty. A yellow circle with the number '2' is positioned above the 'Report Date' dropdown. At the bottom of the form, there is an 'Apply' button.



9 | Account Overdue Balance Report (continued)

- 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: (3)

Report Date: (4)

Apply (5)

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

Download

Results (1)

Broker Name	Employer Name	Customer No.	Policy No.	Pending Term Date	Total Past Due Balance	Customer Balance	Past Due Aging				
							0-30 Days	31-60 Days	61-90 Days	91-120 Days	>120 Days
				2021-01-01	\$4,606.76	\$4,606.76	\$4,606.76	\$0.00	\$0.00	\$0.00	\$0.00

Account Overdue Balance Report

[Change Broker](#)

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

No Terminated Group reports available

Select the Report Type:

Report Date:



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.

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

Welcome Plan Information Plan Rates **2**

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.

< [Select Plan](#)

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		Plan: 7755086		Plan: 12608209	
OPTION 3 NY G MTRO GT 25/40/1250/80 EPO 22		OPTION 1 NY G LBTY NG 25/50/100 EPO ZD 22		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** 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.

The screenshot shows the 'View Benefits' page. At the top left is a back arrow and 'Select Plan'. The main title is 'View Benefits' with a blue underline. Below it is 'GROUP NUMBER : [Change Group](#)'. The 'Plan Information' section is underlined and contains 'PLAN ID : 10049669 - ALL ELIGIBLE | HP4000' and 'Effective Dates : 12/01/2020-11/30/2021'. An 'Apply' button is centered below. A horizontal line separates this from the 'Benefits' and 'Programs' tabs, with 'Benefits' selected. Below the tabs is an alphabetical filter: 'ALL A B C D E F G H I J K L M N O P Q R S T U V W X Y Z'. Below the filter is a search bar with 'Search for benefits' and a magnifying glass icon. The bottom section is a list of benefits with expandable rows:

3D Mammogram	+
3D Mammogram Professional Component	+
Accidental Dental	+



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.

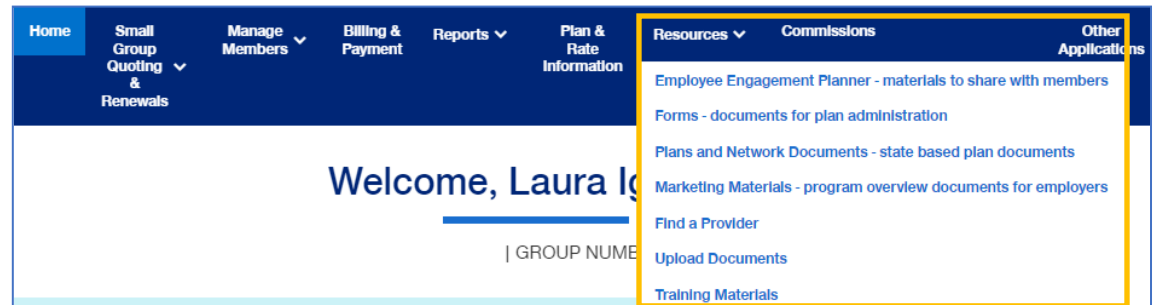
The screenshot shows a web application interface for "Plan & Rate Information". The top navigation bar is dark blue with white text for various menu items: Home, Small Group Quoting & Renewals, Manage Members, Billing & Payment, Reports, Plan & Rate Information (highlighted with a yellow box), Resources, Commissions, and Other Applications. The main content area has a white background with the title "Plan & Rate Information" in blue. Below the title, there is a "GROUP NUMBER:" label and a "Change Group" link. A paragraph of text states: "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." Below this is a section titled "Enter partial or full Plan ID/Description to limit results." with a "FILTER BY" dropdown menu set to "Description" and a search input field containing "Description". A "Medical" section is visible with a "View Medical Rates >" button. At the bottom, the plan is identified as "Plan: 4810705 - CT FREEDOM 15/30/0/100 ACCESS" with a "Coverage Dates" dropdown set to "12/01/2022-11/30/2023". A row of links includes "Employer Handbook" (highlighted with a yellow box), "Member Handbook", "Summary Benefit Coverage", and "View Benefits".



11 | Resources

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

- **Employee Engagement Planner** – Calendar and communications used to help employees stay engaged throughout the plan year
- **Forms** – Forms for employers and employees, including applications, prescription drug lists, HSA forms and claim forms
- **Plans and Network Documents** – Access to plan grids, network brochures and other documents for medical and specialty plans 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
- **Upload Documents** – Upload specific documents
- **Training Materials** – Resources, including guides, presentations and videos

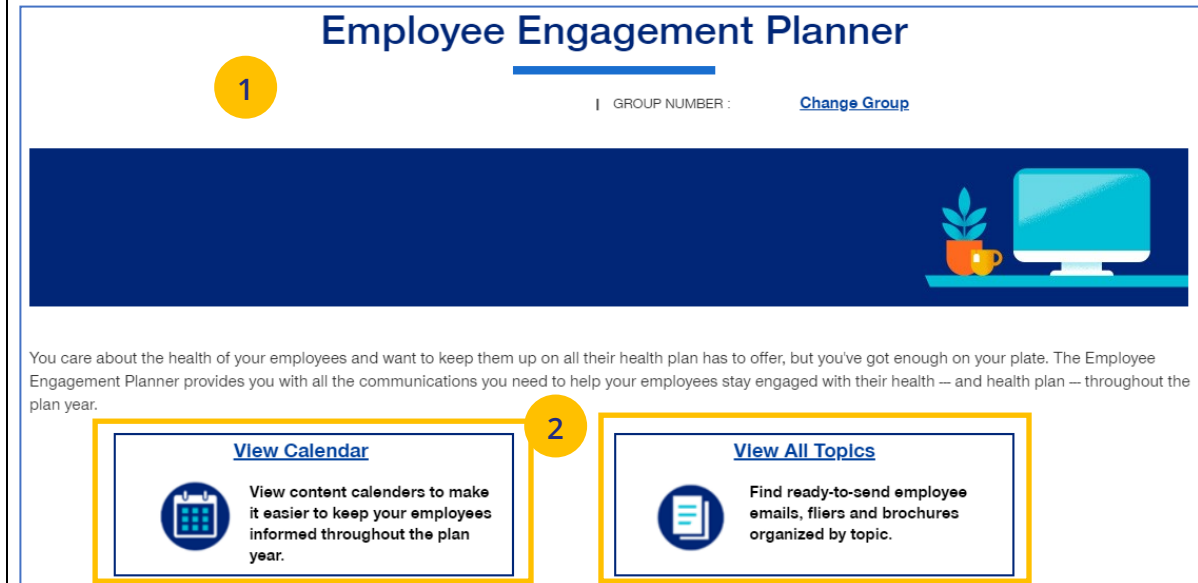
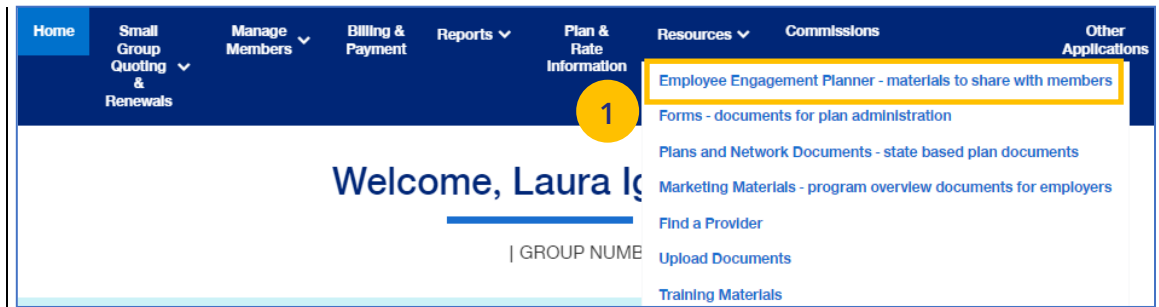


11 | Employee Engagement Planner

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.

1. Click the **Employee Engagement Planner** tab. The **Employee Engagement Planner** screen displays.
2. 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 is currently in 'month' view. The interface includes a sidebar for filtering by brand and effective date, and a main calendar grid with event overlays.

Calendar 3

MILESTONES BEHAVIORAL SERVICES INC. | GROUP NUMBER : 1046476 [Change Group](#)

The calendar makes it easier to keep employees informed on the most important topics throughout the plan year. Select your group to automatically display communications on a variety of topics. You can save your group's calendar to your favorites for future use. Click on the calendar event to access and download the communications to send out to employees.

MILESTONES B... x JUN01'21-UHC x

Add New Calendar

Select Brand

- UnitedHealthcare
- Oxford
- UnitedHealthcare Level Funded

Select Effective Date

Please Select

When selecting multiple filter options, select Apply.

Apply Reset

June 2021

Sun	Mon	Tue	Wed	Thu	Fri	Sat
30	31	1	2	3	4	5
			UHC Welcome Brochure			
6	7	8	9	10	11	12
		UHC Premium Designation				
13	14	15	16	17	18	19
	UHC myUHC.com					
20	21	22	23	24	25	26
	UHC Optum RX					
27	28	29	30	1	2	3
			UHC Cost of Care			



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 access their health plan
- 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:



© June 7, 2022 United HealthCare Services, Inc. All Rights Reserved

101

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.

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

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

Welcome, Laura I
| GROUP NUMBER

Forms 1

Get the latest forms for employers and employees, including applications, Prescription Drug Lists (PDLs), HSA forms, claims forms and more.

Looking for Plans and Networks documents or Marketing Materials?

Plans and Networks documents 2
Marketing Materials for employers

State Group Size Language
Select state 2-50 English

Select a state above to get started.

Installments, Applications, and Enrollments 2

9FC68AFE-48BF-429D-BE3A-38A77B48A51F (1).PDF | Alabama | 10+ Full Packet View PDF
CAL | Alabama | 2-50 Full Packet View PDF



11 | Plans and Networks Documents

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

1. Click the **Plans and Network Documents** link. The **Plans and Network Documents** screen displays.
2. You can (1) sign in to UeS to generate Benefit Summaries and 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.

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

The screenshot shows the top navigation bar with various menu items: Home, Small Group Quoting & Renewals, Manage Members, Billing & Payment, Reports, Plan & Rate Information, Resources, Commissions, and Other Applications. A dropdown menu is open under 'Resources', listing: Employee Engagement Planner - materials to share with members, Forms - documents for plan administration, Plans and Network Documents - state based plan documents (highlighted with a yellow box and a circled '1'), Marketing Materials - program overview documents for employers, Find a Provider, Upload Documents, and Training Materials.

The screenshot shows the 'Plans and Networks Documents' page. At the top, there is a heading 'Plans and Networks Documents' with a circled '1' next to it. Below the heading is a sub-heading 'Get Benefit Summaries and Summaries of Benefits and Coverage (SBCs) on United eServices'. A yellow box highlights the text 'Sign in to United eServices to generate Benefit Summaries and SBCs'. Below this is a blue button labeled 'Sign In to United eServices' with a circled '2' next to it. Further down, there is a form with three dropdown menus: 'Plan Year' (set to 2022), 'State' (set to 'Select state'), and 'Group Size' (set to 2-50). A red message below the form says 'Select a state above to get started.'. Below the form, there is a section titled 'Plans' with the text 'RENPKG | Alabama | 2-50 | 2022'. A yellow box highlights a 'View PDF' button with a circled '2' next to it.



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 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.

The screenshot shows the UnitedHealthcare Marketing Materials interface. At the top, there is a navigation bar with various menu items. A dropdown menu is open under 'Resources', highlighting 'Marketing Materials - program overview documents for employers'. The main content area features a 'Welcome, Lau' message and a 'Marketing Materials' heading. Below this, there is a callout box for the 'Employee Engagement Planner'. At the bottom, there are 'State' and 'Language' dropdown menus. A second set of dropdowns is shown below, with 'Alabama' selected for the state. A 'MEMBER EXPERIENCE' section lists documents with 'View' and 'View PDF' buttons.



11 | Find a Provider

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

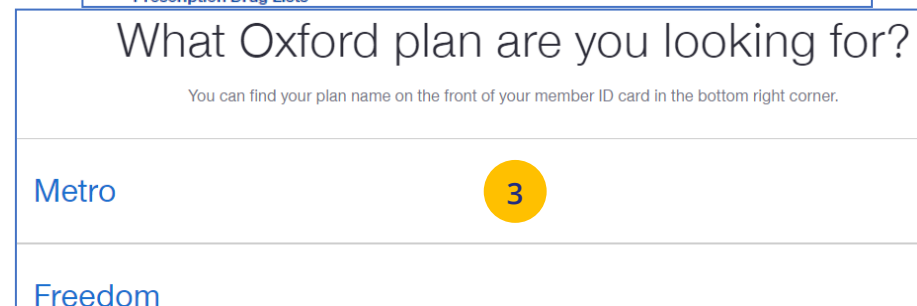
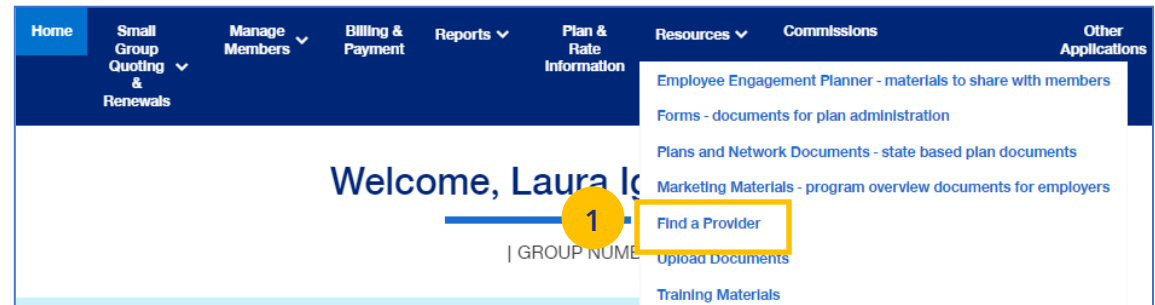
Note: If you have not entered a Group Number previously, you will be asked to search for and find your Group prior to requesting materials.

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

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.



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 by provider, service, or condition [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 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.

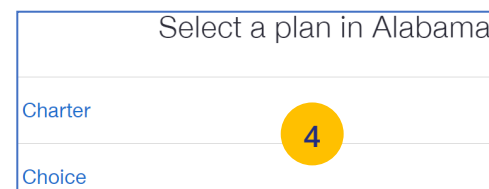
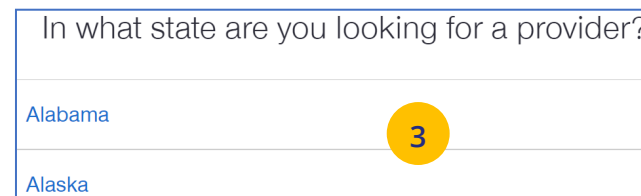
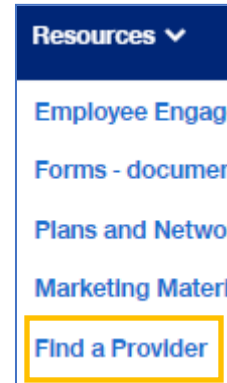
Any cost information on this page is an estimate only. See more information below about participating providers, available services and these estimates.



11 | Find a Provider (continued)

Find A Provider: 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

CHOICE PLUS CHANGE PLAN >

Results for **All Primary Care Providers** 6

Office Visit - Primary Doctor - Established Patient - Low Complexity

Total average cost in your area: \$44 - \$69

[NEW SEARCH](#) [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 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 illustrates the provider search process on the UnitedHealthcare website. It is divided into four numbered steps:

- Step 1:** A dropdown menu under "Resources" is shown, with the "Find a Provider" option highlighted by a yellow box and a yellow circle with the number 1.
- Step 2:** The "Provider Search" page is displayed, showing three network options: "Oxford & Oxford Level Funded", "UnitedHealthcare Level Funded", and "UnitedHealthcare HMO". The "UnitedHealthcare HMO" option is highlighted with a yellow circle and the number 2.
- Step 3:** A prompt asks the user to "To search for doctors, clinics or facilities, choose the state where you live". Below this, four state icons are shown: California, Oklahoma, Oregon, and Washington. The California icon is highlighted with a yellow circle and the number 3.
- Step 4:** A screen titled "Select a network in California" is shown. It lists two network options: "SignatureValue Advantage HMO" and "SignatureValue Alliance HMO". The "SignatureValue Advantage HMO" option is highlighted with a yellow circle and the number 4.



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 type of provider and click **Search**. A list of providers will be shown. You can filter the results if needed.

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

5

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

6

Search by provider, service, or condition

SEARCH

CHOICE PLUS CHANGE PLAN >

< Results for **All Primary Care Providers** 6

Office Visit - Primary Doctor - Established Patient - Low Complexity
Total average cost in your area: \$44 - \$69

NEW SEARCH
VIEW MAP

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

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.

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



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.

Resources ▾

- Employee Engage
- Forms - document
- Plans and Networ
- Marketing Materk
- Find a Provider** (1)

Provider Search

 Oxford & Oxford Level Funded	 UnitedHealthcare Level Funded	 UnitedHealthcare HMO
 United Healthcare Freedom Plans (2)	 UnitedHealthcare Fully Insured	 United Behavioral Health

What plan are you looking for?

You will find your plan name on the bottom-right corner of your member ID card.

- Individual and Family State Exchanges
- All Savers Health Plans (3)
- Charter / Charter Balanced



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.

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: 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.

Resources ▾

- Employee Engage
- Forms - document
- Plans and Networ
- Marketing Mater
- Find a Provider** 1

Provider Search

 Oxford & Oxford Level Funded	 UnitedHealthcare Level Funded	 UnitedHealthcare HMO
 United Healthcare Freedom Plans	 UnitedHealthcare Fully Insured 2	 United Behavioral Health

Are you a current UHC member or are you shopping for a health plan?

 UHC Member You have UnitedHealthcare	 Shopping Around View your UHC plan options 3
--	--

What plan are you looking for?

You will find your plan name on the bottom-right corner of your member ID card.

- Individual and Family State Exchanges
- All Savers Health Plans** 4
- Charter / Charter Balanced



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

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

Changing a search results filter will reload the page immediately.

- All Results (37)
- Health Care Professionals (6)
- Clinics and Facilities (27)

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.

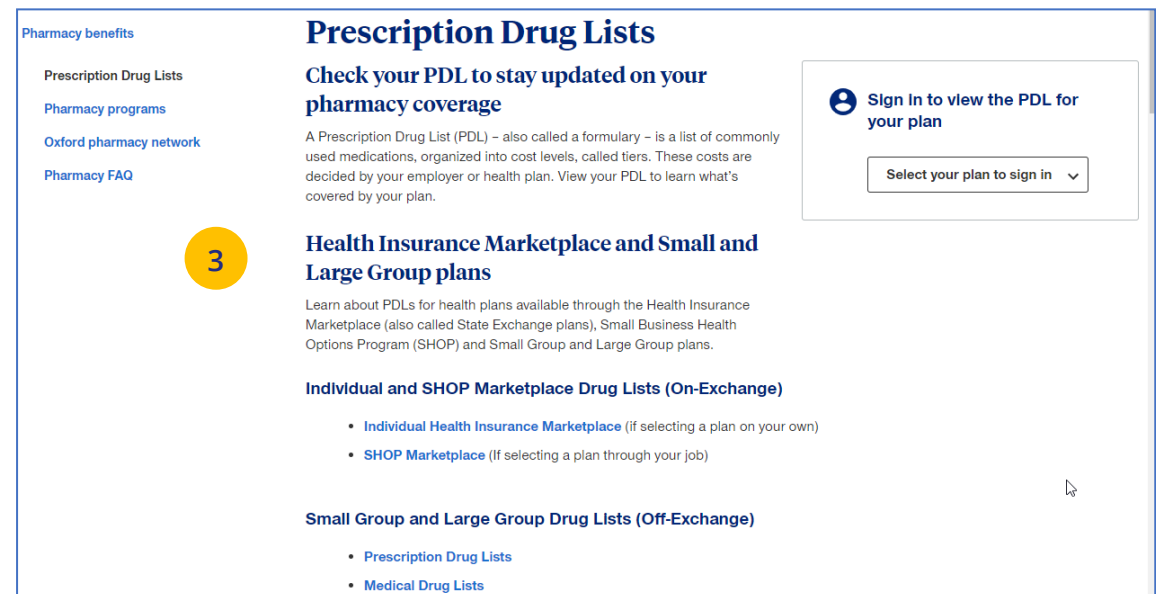
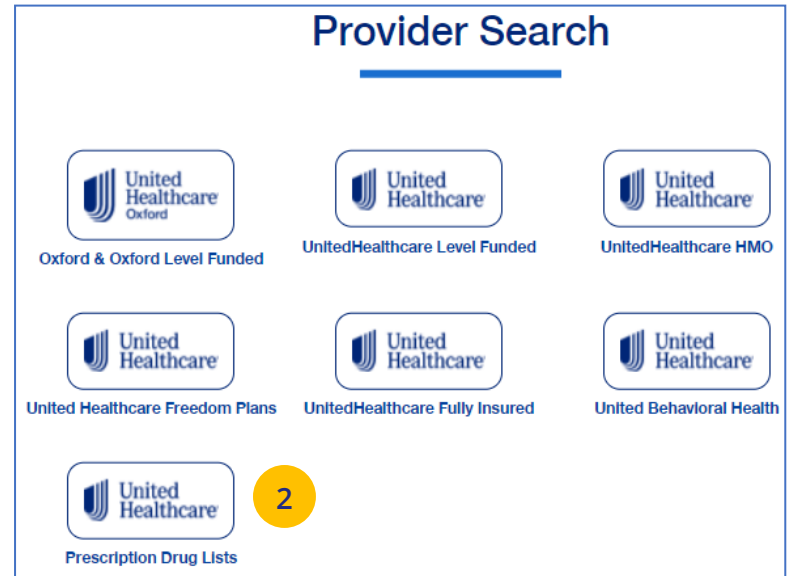
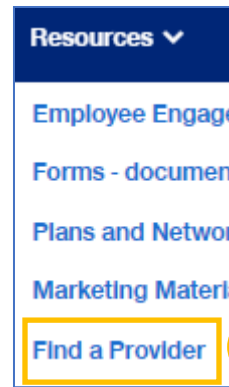
The screenshot displays the 'Provider Search' interface. At the top left, a 'Resources' dropdown menu is open, with 'Find a Provider' highlighted and marked with a yellow circle and the number '1'. Below this, a grid of six United Healthcare logos is shown, each with a plan name underneath. The logo for 'United Behavioral Health' is marked with a yellow circle and the number '2'. Below the grid is a large blue banner with the text 'Find a Provider' and 'Find therapists, psychiatrists, or other clinics in your network.' A search bar is present with the placeholder text 'Enter provider name, keyword or leave blank' and a location field set to 'Eden Prairie, MN 55344'. A yellow circle with the number '3' is placed over the search bar. Below the banner, the search results page is shown, featuring a search bar, a 'Refine Results' sidebar, and a list of provider profiles. The first profile is for 'Leah Willett BCBA', marked with a yellow circle and the number '3'. The second profile is for 'Melanie Vankuiken BCBA'.



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.



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 those with Internal Portal Admin, Underwriting, Internal Sales, Broker Lead, Broker User and Employer Lead roles.

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.

Note: A message displays at the bottom of the screen with a link that allows you to check group eligibility.



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.

The screenshot illustrates the document upload process in three stages:

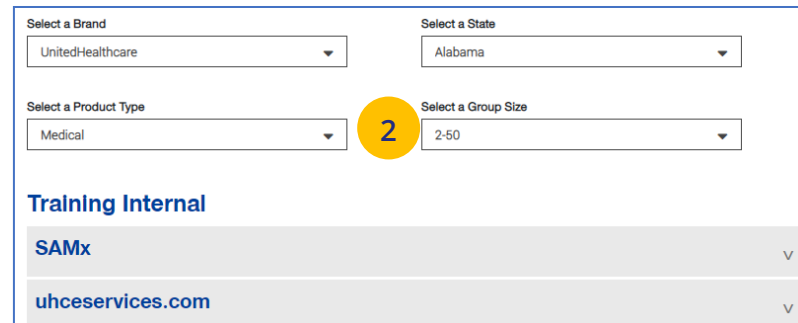
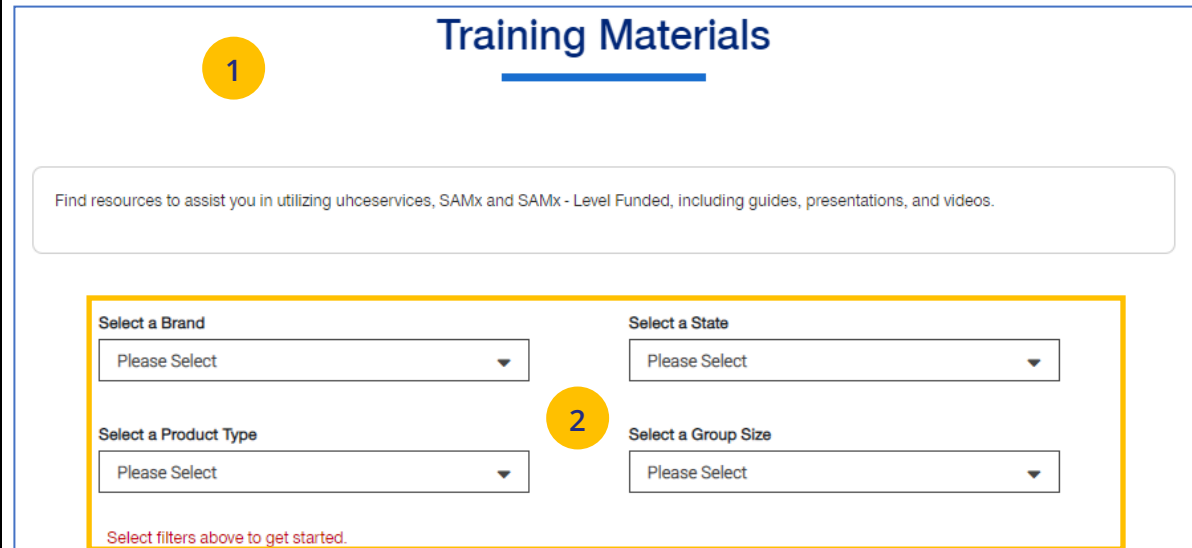
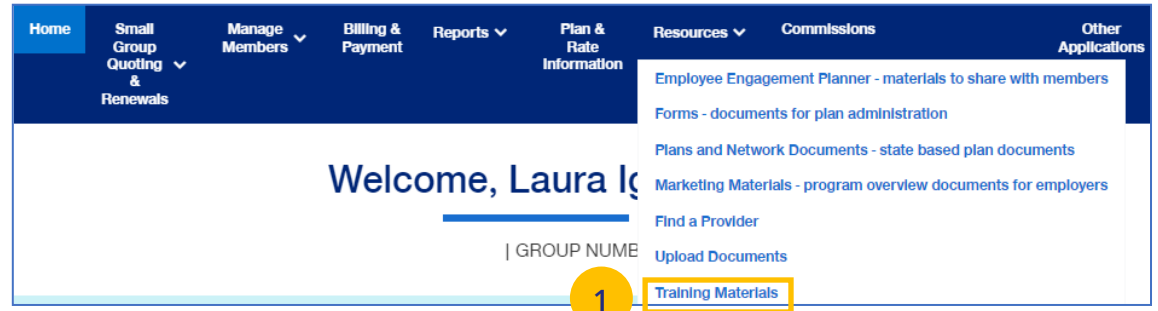
- Step 2:** A dropdown menu for "Document Name" is open, showing a list of document types. "Employer Information Form" is highlighted. A yellow circle with the number "2" is next to the dropdown.
- Step 3:** The "Document Name" is set to "1099 Attestation Form". The "Select Document for Upload" field contains a file named "Decision 2.jpg". A yellow circle with the number "3" is next to the file selection area. An "Add Row" button is visible at the bottom right.
- Step 4:** The "Upload" button is highlighted. A yellow circle with the number "4" is next to it. Below the "Upload" button, a confirmation message reads: "Document Decision 2.jpg successfully uploaded as 1099 ATTESTATION FORM. Document ID: 0902b2da80189d0c". A "Clear Selections" button is also visible.



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.



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. Enter the Year and Month and click **Apply**. The available commission statements will display.
3. You can export a statement to either PDF or Excel.

Note: If **All Savers** commission statements are available, a link to uhone.com will be shown. There is also a link to United eServices (UeS).

Note: How to read your statement – Click on the How to read your statement link to view a description of the statement and how to read it.

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

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

Commissions

Select the Year: 2021 Select the Month: November [How to read your statement](#) **Apply** **2**

Can't find the commission statement you are looking for? Try: [United eServices for UHC Fully Insured Commissions](#)

To see your USB statements use the United eServices link.

Commissions

Commission statements, for clients that have only UnitedHealthcare HMO, are not yet available on this site and will continue to be mailed to brokers.

Select the Year: 2021 Select the Month: January [How to read your statement](#) **Apply**

January 2021 **3**

UHC_028264_20210119	Export as PDF	Export as Excel
UHC_028264_20210105	Export as PDF	Export as Excel

Link to Commissions in Other Applications:
United eServices commission statements
[Unitedeservices.com](#)



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

Employer eServices



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

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

Carrier
UnitedHealthcare

Functionality
Enrollment

Funding Type
Fully Insured

[Go to Employer eServices](#)



Appendix: Broker Roles and Permissions

[TABLE OF CONTENTS](#)

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	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
Disable a Broker user's account	Y	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
View plan documents and benefits for an Employer group	Y	Y	Y	Y	N	N	N	N	N	N	N	N
Invite Employer users	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
Disable an Employer user's account	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
View existing members within an Employer group	Y	Y	Y	Y	N	N	N	N	N	N	N	N
Enroll new members within an Employer group	Y	Y	Y	N	N	N	N	N	N	N	N	N
Update existing members within an Employer group	Y	Y	Y	N	N	N	N	N	N	N	N	N
Terminate existing members within an Employer group	Y	Y	Y	N	N	N	N	N	N	N	N	N
Print or order a member's ID Card	Y	Y	Y	Y	N	N	N	N	N	N	N	N
Quote new business (UeS, Project X, All Savers, Quick Quote)	Y	Y	Y	Y	N	Y	Y	Y	N	N	N	Y
View Commissions page	Y	Y	Y	Y	N	Y	Y	N	Y	N	Y	N
View MLR reports	Y	Y	Y	Y	N	Y	Y	Y	Y	Y	Y	Y
Access to the Billing and Payment page and ability to view bills	Y	Y	Y	Y	N	N	N	N	N	N	N	N
View Member and Employee Handbooks	Y	Y	Y	Y	N	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
Upload a document via the Upload Document screen	Y	Y	Y	Y	Y	N	N	N	N	N	N	N
View Banking Report	Y	Y	Y	Y	Y	N	N	N	N	N	N	N
View Account Overdue Balance Report	Y	Y	Y	Y	Y	N	N	N	N	N	N	N
View Level Funded Report	Y	Y	Y	Y	Y	N	N	N	N	N	N	N
View Payment Integrity Report	Y	Y	N	N	N	N	N	N	N	N	N	N
View Claims Experience Reporting	Y	Y	Y	Y	Y	N	N	N	N	N	N	N



Appendix: Employer Roles and Permissions

[TABLE OF CONTENTS](#)

Function	Employer Lead	Employer User	Employer User with CER	Employer View Only	Employer View Only with CER	Employer View Only with Member Handbook	Employer View Only with Employer Handbook
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
View, update and disable an employer user's	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	Y	Y	Y	Y	Y	Y	Y
View members within an Employer group	Y	Y	Y	Y	Y	Y	Y
Enroll members within an Employer group	Y	Y	Y	N	N	N	N
Update members within an Employer group	Y	Y	Y	N	N	N	N
Terminate members within an Employer group	Y	Y	Y	N	N	N	N
Print or order a member's ID Card	Y	Y	Y	N	N	Y	N
Quote new business (UeS, Project X, All	Y	Y	Y	Y	Y	N	N
View Commissions page	Y	Y	Y	Y	Y	N	N
View MLR reports	N	N	N	N	N	N	N
Access to the Billing and Payment page and	Y	Y	Y	Y	Y	N	Y
View Member Handbook	Y	Y	Y	Y	Y	Y	N
View Employee Handbook	Y	Y	Y	Y	Y	N	Y
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	Y	Y	Y	N	N	N	N
View Banking Report	Y	Y	Y	Y	Y	N	N
View Account Overdue Balance Report	N	N	N	N	N	N	N
View Level Funded Report	Y	Y	Y	N	N	N	N
View Payment Integrity Report	Y	Y	Y	N	N	N	N
View Claims Experience Report	Y	N	Y	N	Y	N	N

