



Uhceservices.com Reference Guide for Brokers



About this Document

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

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

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

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

Using this Document

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1 | How to Register: Email Invitation

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

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

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

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

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

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

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Dear Cindi:

Welcome. Personal access to the [uhceservices.com](#) broker and employer website on behalf of **TRUE LIFE CENTER FOR WELLBEING**.

The website is your primary destination for information pertaining to your client's health benefits plan and your business transactions with us.

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 **TRUE LIFE CENTER FOR WELLBEING**.

Get Started

- **Already have a One Healthcare ID?** We encourage you to use the One Healthcare ID you already have (e.g.; the One Healthcare ID you use for Employer eServices (employereservices.com)), but you will still need to complete the registration process.
- Click - [Register Now](#) - 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.

Act Now

Don't miss out on this important access to [uhceservices.com](#) on behalf of **TRUE LIFE CENTER FOR WELLBEING**. The website link in this invitation will expire. If you do not complete your initial registration on the website using this email before it expires, you will need to contact us for a new invitation. Once you successfully register on the website, bookmark the address and you can revisit it directly at any time.**

If you have questions about your access, please contact your Dedicated Client Services Manager or call Client Services at 1-800-591-9911.

Thank you,

uhceservices.com Administration Team

Email Invitation to Brokers and Employers (Cirrux)

Subject: Your registration for uhceservices.com

Dear \$FirstName\$ \$LastName\$,

Welcome. We're pleased to provide you with personal access to the [uhceservices.com](#) broker and employer website on behalf of \$InsurerName\$.

The website is meant to be your self-service destination for information pertaining to your client's health benefits plan and your business transactions with us.

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 \$InsurerName\$.

Get Started

- Click [Register Now](#) and follow the prompts for entering your One Healthcare ID* and password in the appropriate fields.
- **Already have a One Healthcare ID?** We encourage you to use the One Healthcare ID you already have (e.g.; the One Healthcare ID you use for Employer eServices (employereservices.com)), but you will still need to complete the registration process.
- **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.

Act Now

Don't miss out on this important access to [uhceservices.com](#) on behalf of \$InsurerName\$. The website link in this invitation will expire. If you do not complete your initial registration on the website using this email before it expires, you will need to contact us for a new invitation. Once you successfully register on the website, bookmark the address and you can revisit it directly at any time.**

If you have questions about your access, please contact Client Service Operations Team at 800-591-9911.

Thank you,

uhceservices.com Administration Team

*One Healthcare ID delivers a secure, centralized identity management solution that enables a single sign-on to all integrated applications. You register for an One Healthcare ID once and use that One Healthcare ID to access to all of the associated applications seamlessly. You can access service tools to reset your password, recover your One Healthcare ID, and maintain your profile.

**Except for periodic downtimes.

Health plan coverage provided by or through UnitedHealthcare Insurance Company, UHC of California and UnitedHealthcare Benefit Plan of California. Administrative services provided by UnitedHealthcare Services, Inc., OptumRx or OptumHealth Care Solutions, Inc. Behavioral health products are provided by U.S. Behavioral Health Plan, California (USBHP-C).

You are receiving this email because you have a health plan with us.

This mailbox is used for outbound messages only; please do not reply.

All replies are automatically deleted. For questions regarding this message, refer to the contact information.

This e-mail, including attachments, may include confidential and/or proprietary information, and may be used only by the person or entity to which it is addressed. If the reader of this e-mail is not the intended recipient or his or her authorized agent, the reader is hereby notified that any dissemination, distribution or copying of this e-mail is prohibited. If you have received this e-mail in error, please notify the sender by replying to this message and delete this e-mail immediately.

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

© 2021 United HealthCare Services, Inc.

Email Invitation to Brokers and Employers (UnitedHealthcare HMO)



1 | How to Register: Email Invitation (continued)

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

Create One Healthcare ID

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

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

Profile Information

First name

Last name

Year of birth



2



1 | How to Register: Email Invitation (continued)

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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)

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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

--Select--

Security answer 1

Security question 2

--Select--

Security answer 2

Security question 3

--Select--

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.

I Agree

5



1 | How to Register: Email Invitation (continued)

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

Next Step: Verify Your Email Address

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

10-digit activation code

1571003356

Next

Cancel

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

Reply

Reply All

Forward

Thu 3/25/20

One Healthcare ID

Your One Healthcare ID

Activate my One Healthcare ID

6

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

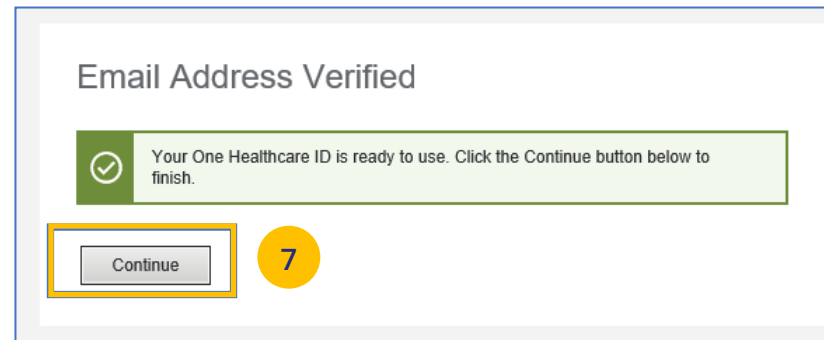
If you did not request an activation link or code, or if you have questions about setting up an One Healthcare ID, contact us at 1(855)819-5909 or optumsupport@optum.com.



1 | How to Register: Email Invitation (continued)

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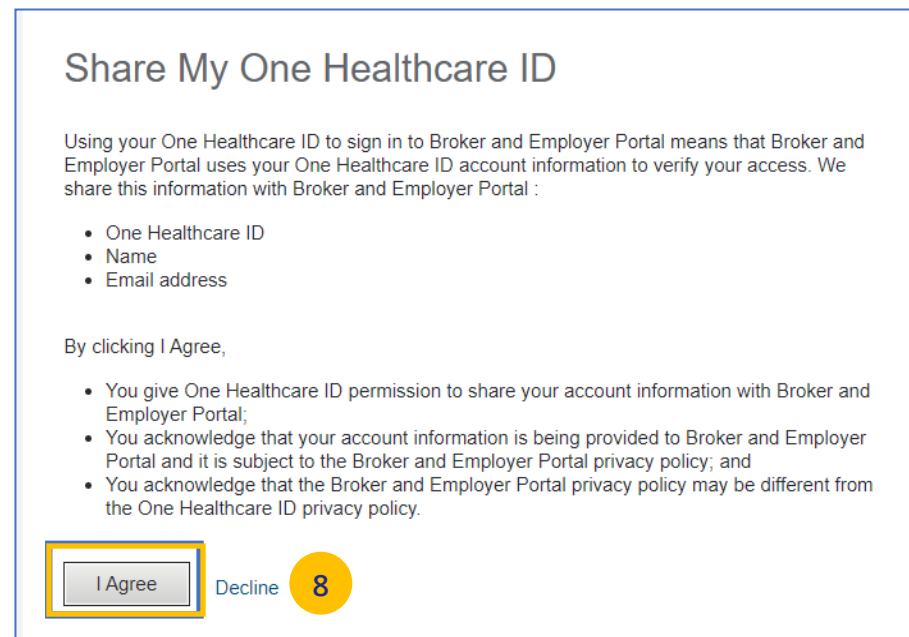
7. Click **Continue**.
8. Click **I Agree** to agree to share your One Healthcare ID information with the Broker & Employer (B&E) portal.



Email Address Verified

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



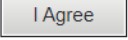
Share My One Healthcare ID

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.

 [Decline](#) 



1 | How to Register: Email Invitation (continued)

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9. 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.
10. Click **Agree**. You are now ready to use uhceservices.com.

Attestation

Please click each document link to enable the checkbox.

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

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

Click each link

Agree

Disagree



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

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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.

- 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.

- Click **Register**.

UnitedHealthcare® United eServices

Please Log In

Username
levisg

Password
.....

Log In

Forgot Your Password?
New to the site? Register Here.

Your Online Comprehensive Resource Center

Broker Service

- Online Quoting
- Enrollment
- Renewals
- Product Information
- Network Information
- Compensation

What's New

UHC COVID-19
View important information →

Demos & Training
View the demo →

Broker News Site
Visit the News Site →

Employer eServices
Visit Employer eServices →

UnitedHealthcare® United eServices

UnitedHealthcare is launching an enhanced Broker experience, uhceservices.com, with added capabilities and one ID/Password. Please register to access this website to manage your business.

If you signed into United eServices (UeS) using:

- a shared UeS username/password, where you are NOT the primary account holder (i.e. you are using someone else's account in your office) then STOP and contact the Help Desk at 1-866-336-9369 to receive assistance in setting up your own account.
- your own UeS username/password (not a shared account) OR a shared UeS username/password, where you are the primary account holder (i.e. others are using your account)

Then proceed to "Register" below. If you are already using a One Healthcare ID on Employer eServices or Oxford Broker, please use the same ID to register for this new site. If you do not have a One Healthcare ID, you will create a new one. Once you register you will no longer log into United eServices directly. If you need assistance, please contact UeS Technical Support at 1-866-336-9369.

From uhceservices.com you can go to Small Group Quoting & Renewals, Commissions, or Other Applications to locate a link to United eServices

Register



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

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

Create One Healthcare ID

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

 **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

Confirm your One Healthcare ID email address

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

One Healthcare ID

Your One Healthcare ID



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

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



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

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

The image shows two screenshots of a web interface. The first screenshot, titled 'Email Address Verified', features a green confirmation box with a checkmark icon and the text: 'Your One Healthcare ID is ready to use. Click the Continue button below to finish.' Below this, a 'Continue' button is highlighted with a yellow rectangle, and a yellow circle with the number '5' is positioned to its right. The second screenshot, titled 'Share My One Healthcare ID', contains a paragraph explaining that using the One Healthcare ID to sign in to the Broker and Employer Portal means sharing account information. It lists the shared information: One Healthcare ID, Name, and Email address. Below this, it states 'By clicking I Agree,' followed by a bulleted list of terms: giving permission to share account information, acknowledging the Broker and Employer Portal privacy policy, and acknowledging that the Broker and Employer Portal privacy policy may differ from the One Healthcare ID privacy policy. At the bottom, an 'I Agree' button is highlighted with a yellow rectangle, and a yellow circle with the number '6' is positioned to its right.

Email Address Verified

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

Continue

5

Share My One Healthcare ID

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

- One Healthcare ID
- Name
- Email address

By clicking I Agree,

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

I Agree

6



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

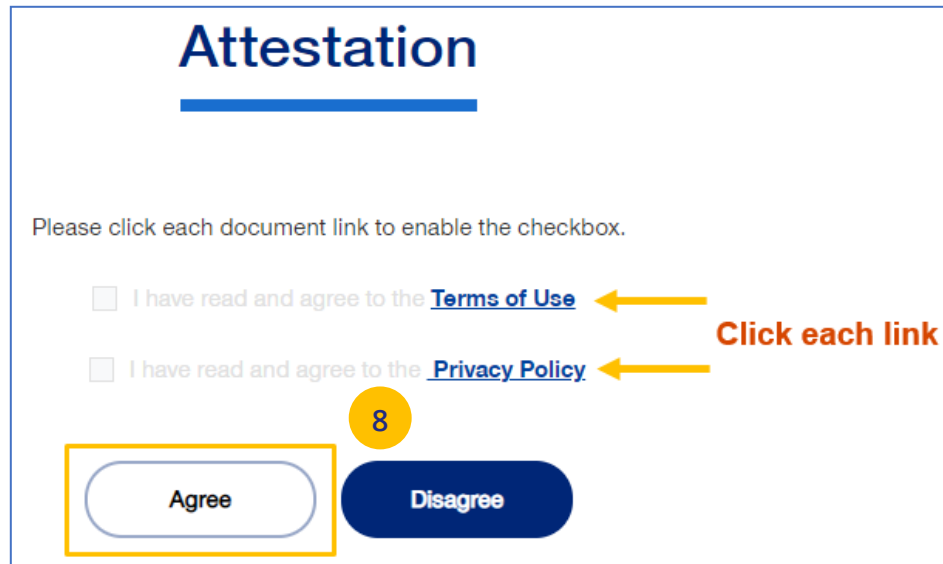
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- Follow the Attestation process by clicking each link (Terms of Use and Privacy Policy). Then click **Agree**. The **Pending Associations** screen displays.

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

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

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



Attestation

Please click each document link to enable the checkbox.

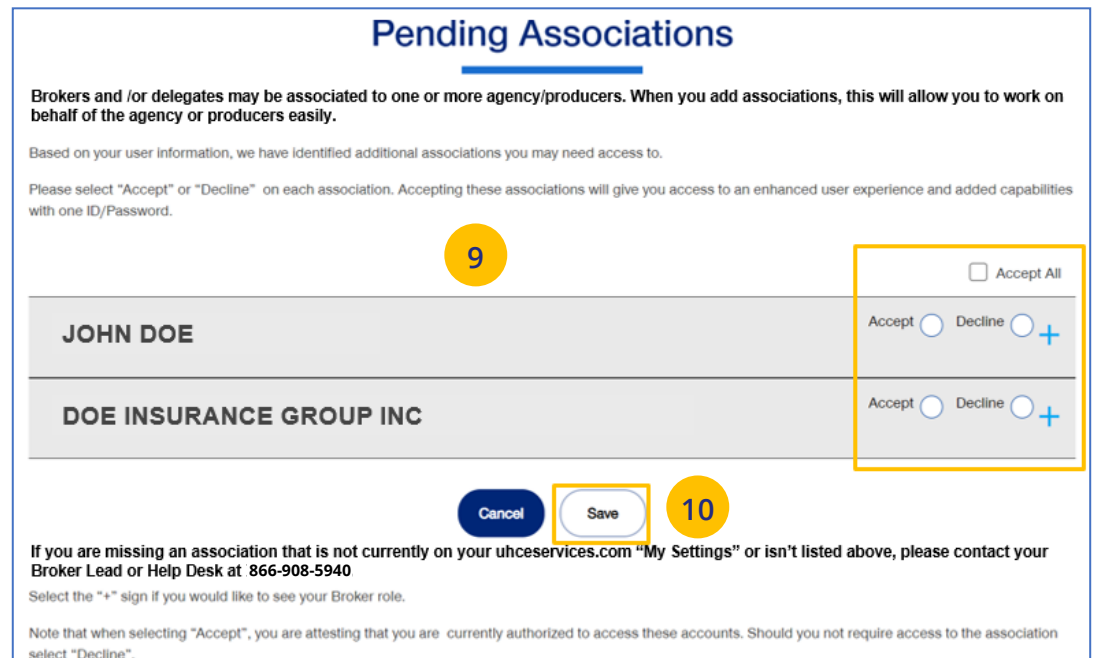
☐ I have read and agree to the [Terms of Use](#)

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

Click each link

8

Agree **Disagree**



Pending Associations

Brokers and /or delegates may be associated to one or more agency/producers. When you add associations, this will allow you to work on behalf of the agency or producers easily.

Based on your user information, we have identified additional associations you may need access to.

Please select "Accept" or "Decline" on each association. Accepting these associations will give you access to an enhanced user experience and added capabilities with one ID/Password.

9

	☐ Accept All
JOHN DOE	Accept ☐ Decline ☐ +
DOE INSURANCE GROUP INC	Accept ☐ Decline ☐ +

Cancel **Save** **10**

If you are missing an association that is not currently on your uhceservices.com "My Settings" or isn't listed above, please contact your Broker Lead or Help Desk at 866-908-5940

Select the "+" sign if you would like to see your Broker role.

Note that when selecting "Accept", you are attesting that you are currently authorized to access these accounts. Should you not require access to the association select "Decline".



1 | Access and Log In with OneHealthcare ID

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NOTE: You cannot access the site directly until you receive an “invite” link from uhceserv_invite@uhc.com and go through the steps to receive access. Once you receive access through the “invite,” you can log in using the steps below.

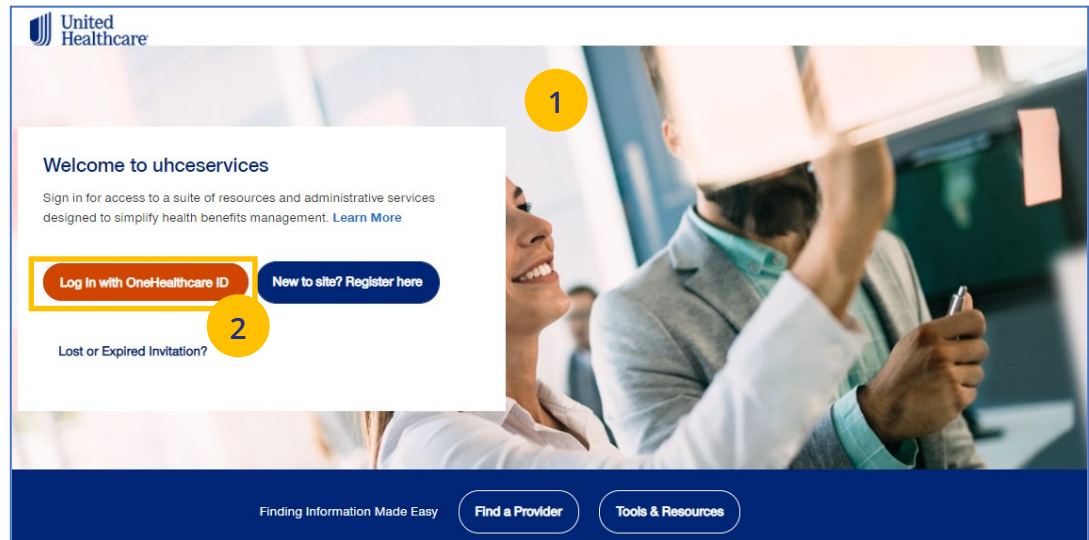
NOTE: If you have lost or deleted your email invitation, click the **Lost or Expired Invitation?** link. Follow the prompts to get a new invitation sent to you.

1. Go to uhceservices.com. The Log In page displays.
2. Click **Log In With OneHealthcare ID**.
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. If this happens, contact the technical support line.

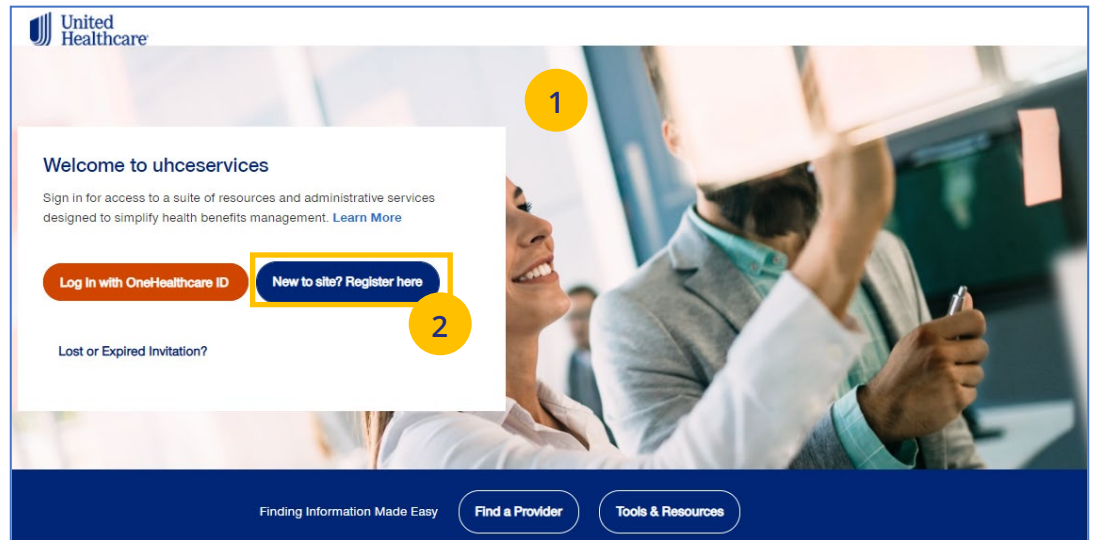


1 | Access: New to Site

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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.



Search for United eServices Account

2

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

Username 3

Password 4

5

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



1 | Access: New to Site (continued)

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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.

5 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.



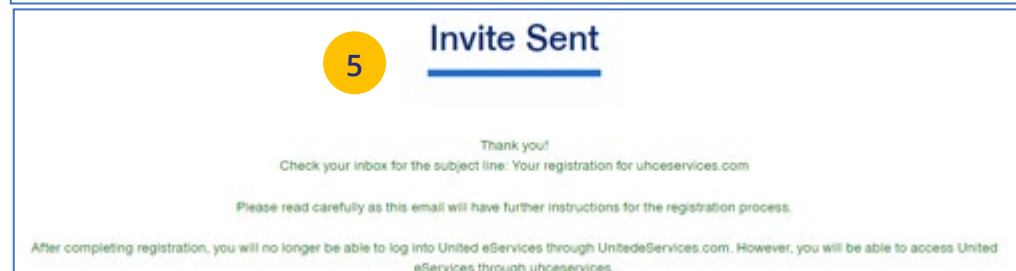
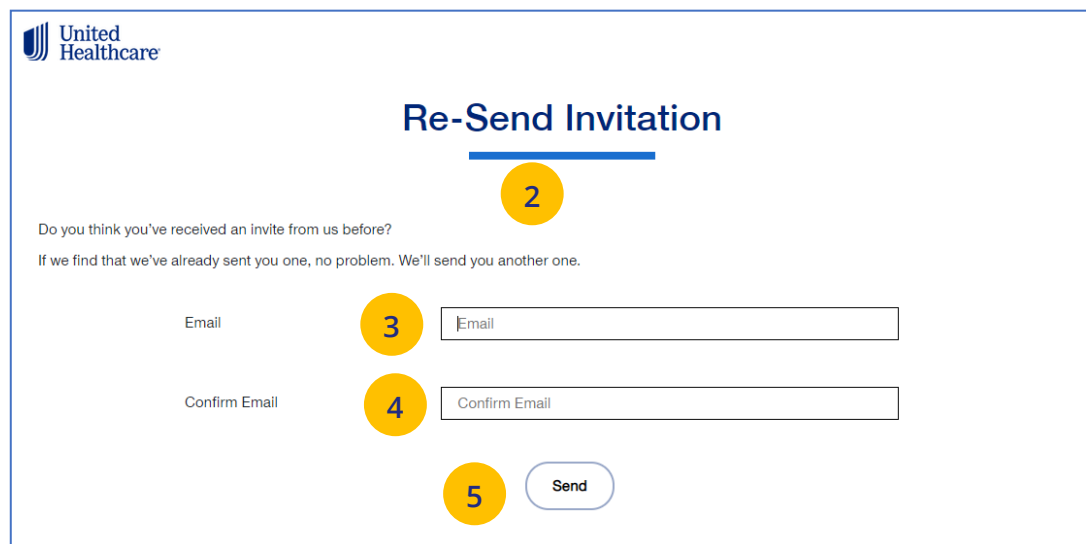
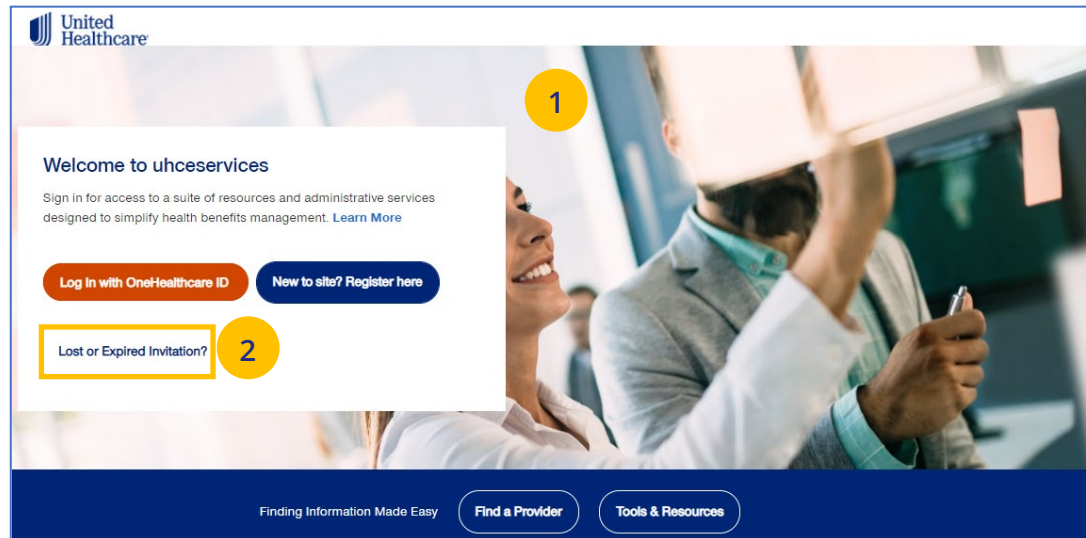
1 | Access: Lost or Expired Invitation

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NOTE: Registration invites expire after 60 days. 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 generate reports
 - logout

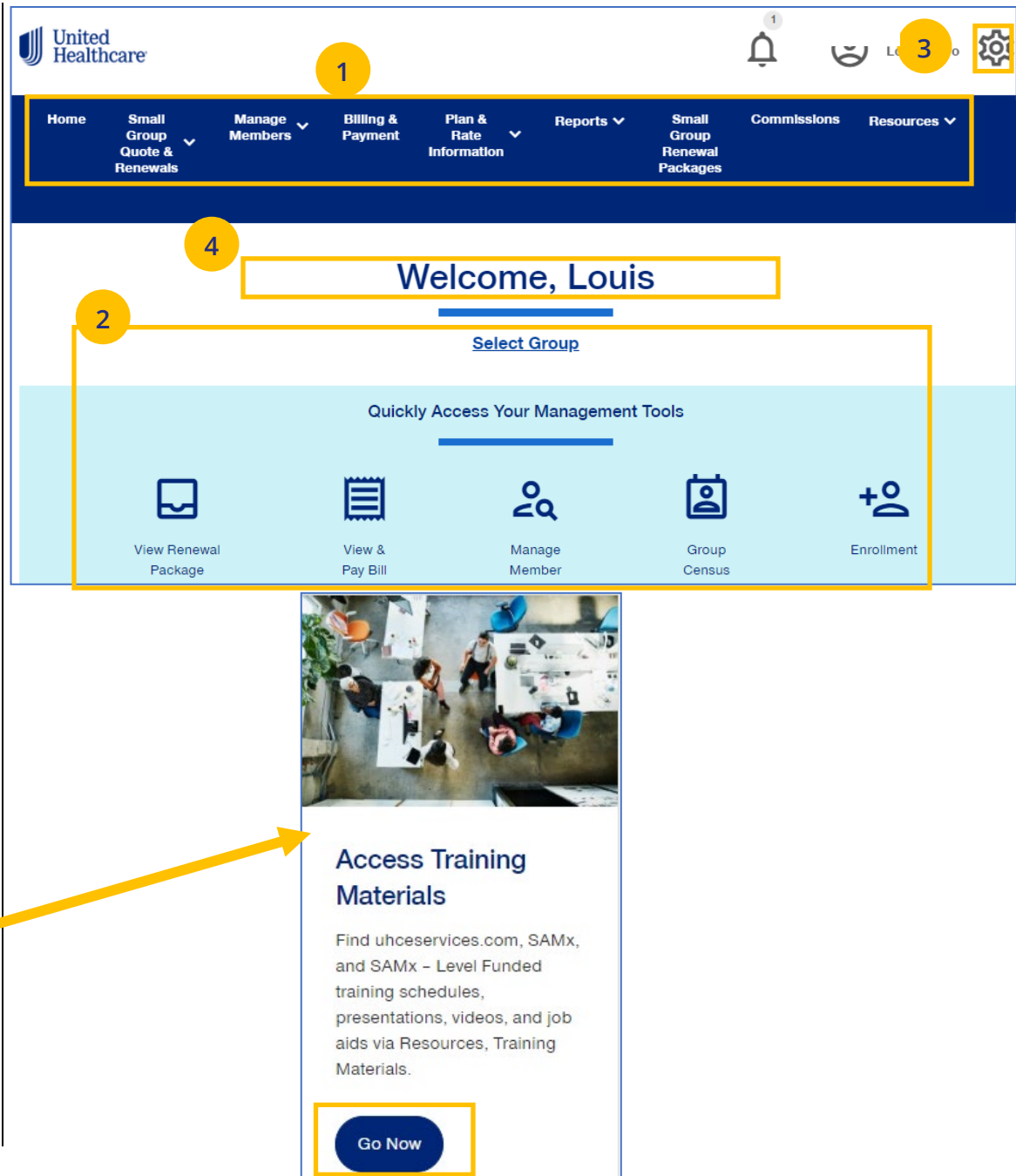
4. The **Group Selection** option is used initially to select a group. After selection, the group name and group number will be shown.

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

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

Note: You can scroll down on the **Home Page** to access more information. Just click the **Go Now** 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.



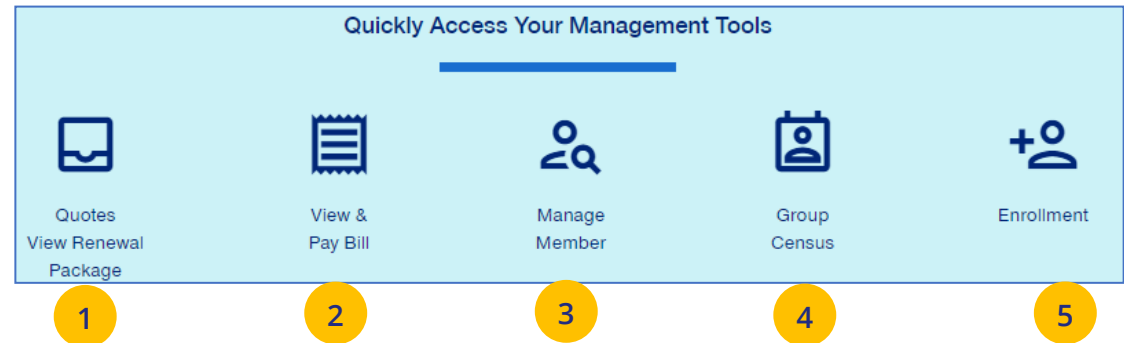
3 | Quickly Access Your Management Tools

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

These shortcuts most often include:

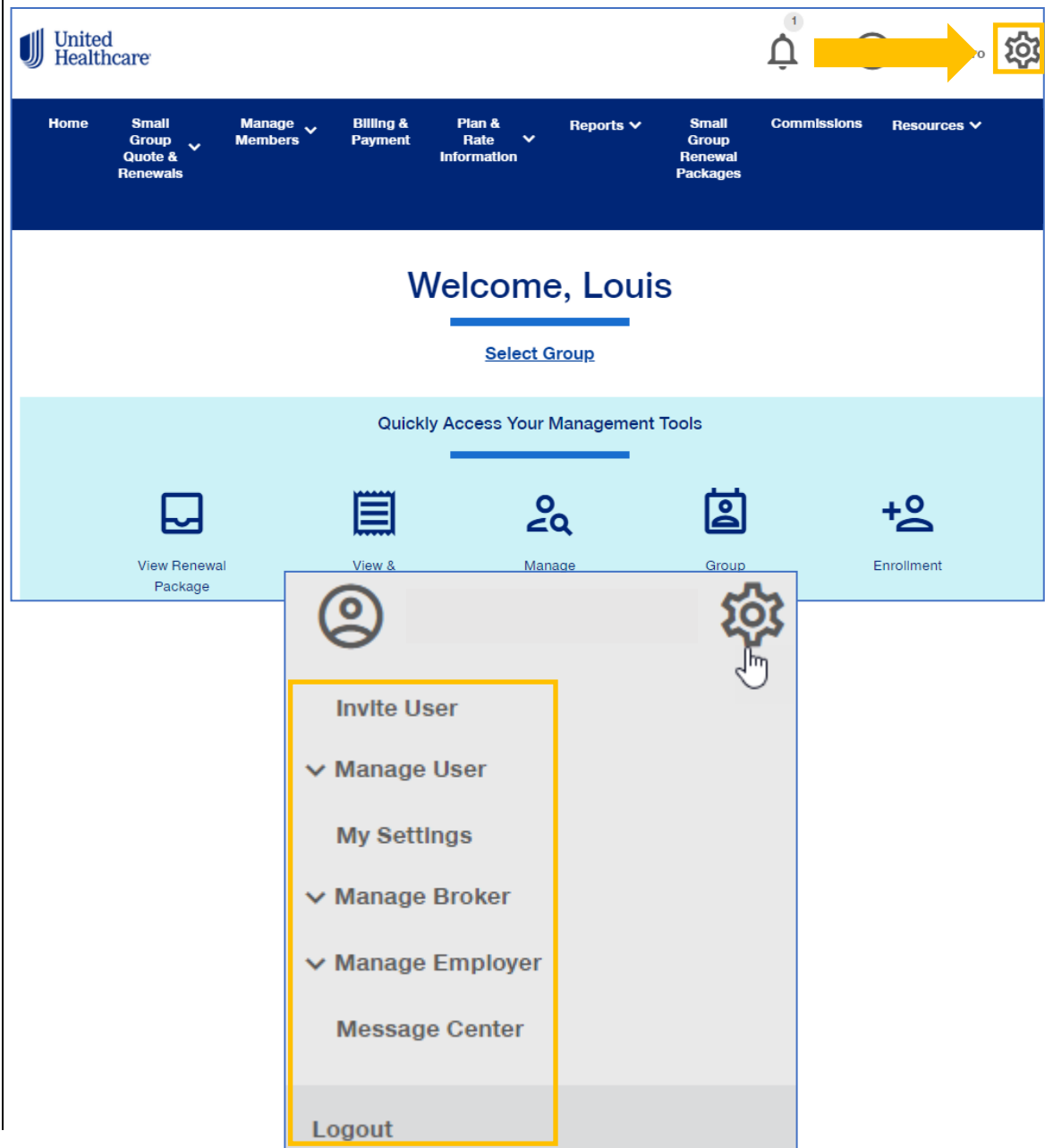
1. **Quotes View Renewal Package** – Access United eServices (UeS) to view quotes and renewal packages
2. **View & Pay Bill** – Displays Billing & Payment screen.
3. **Manage Member** – Allows you to search for a member within the specific group.
4. **Group Census** – Displays Member & Subscriber Lists.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



4 | Gear Icon

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

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



4 | Invite User

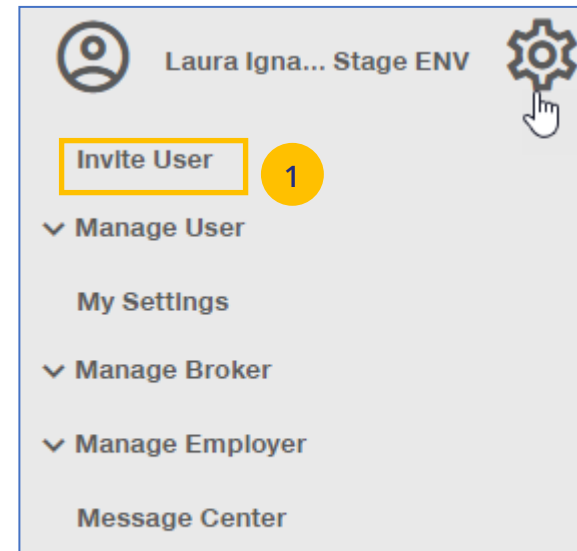
Broker users with user maintenance permissions can give support staff access to uhceservices so they can perform functions on the broker's behalf. To invite a someone to use uhceservices.com:

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

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

Broker and Employer Roles

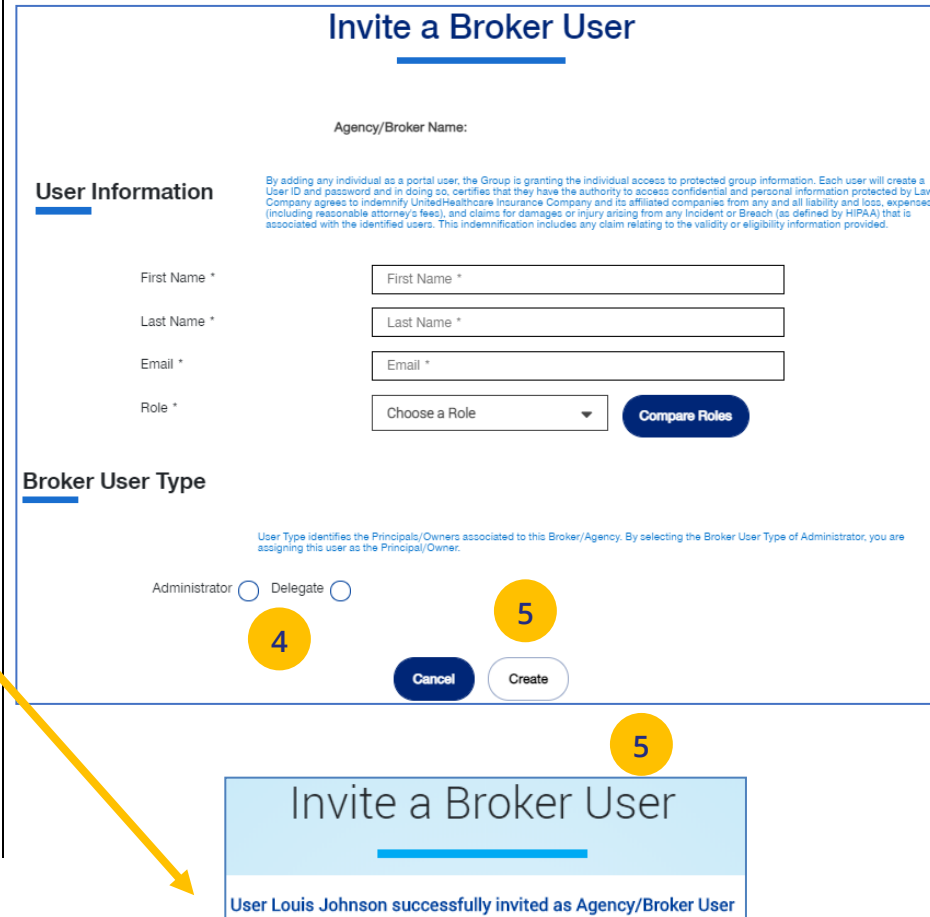
Click [here](#) to go an **Appendix** at the end of this document that shows (1) **Broker roles** and permission descriptions, and (2) **Employer roles** and permission descriptions.

A screenshot of the 'Invite a Broker User' form. The title 'Invite a Broker User' is at the top. Below it is a field for 'Agency/Broker Name:'. The 'User Information' section contains four input fields: 'First Name *', 'Last Name *', 'Email *', and 'Role *'. The 'Role *' field is a dropdown menu labeled 'Choose a Role'. A yellow circle with the number 2 is next to the 'Last Name' field, and a yellow circle with the number 3 is next to the 'Role' dropdown. There is a 'Compare Roles' button. Below the 'User Information' section is the 'Broker User Type' section, which has a description and two radio buttons: 'Administrator' and 'Delegate'. At the bottom are 'Cancel' and 'Create' buttons.

4 | Invite User (continued)

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- 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.
- 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

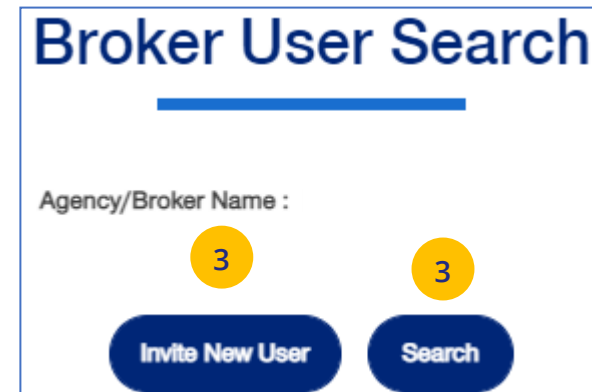
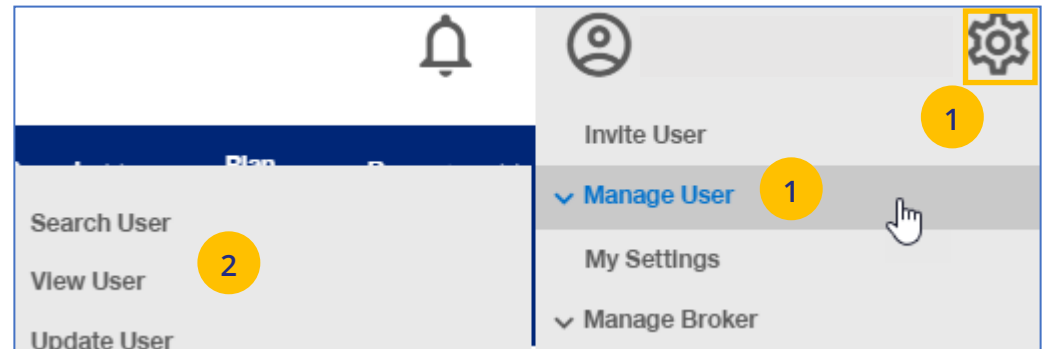


4 | Manage User

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

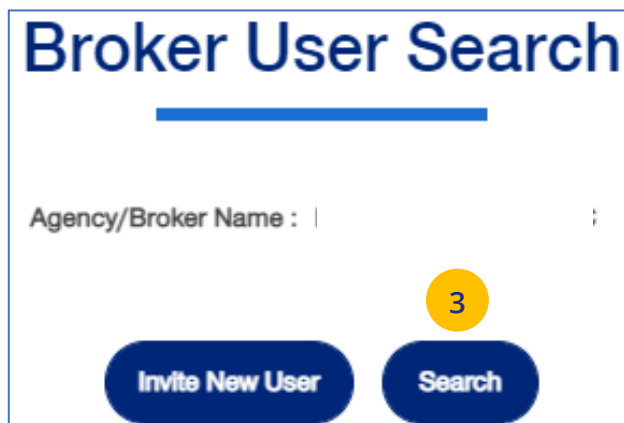
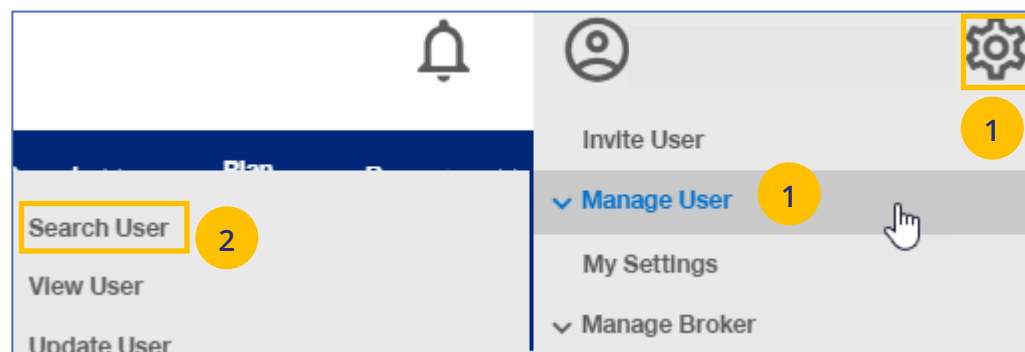
1. Click the **gear icon**  and select **Manage User**. You will have three options:
 - **Search User** – You can search for a user or invite a new user (if you have that capability)
 - **View User** – You can search for a user or invite a new user (if you have that capability)
 - **Update User** – You 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)

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

4. In the **Filter by** area, click the plus sign to expand the filter fields. Search for the user you need using the filter fields
5. 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

(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	
(Invited)					Select User
One Healthcare ID	User Email	Role	Last Login	Deactivation	
	anglette_d_piatt...	Standard Broker with Commissions	N/A	N/A	Re-Invite
(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	
	ldylan@compny.or...	Standard Broker with Commissions	N/A	N/A	Re-Invite 5
User Louis Dylan successfully re-invited as Standard Broker with Commissions.					



4 | My Settings

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

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

The screenshot displays the 'My Settings' page. At the top, a navigation bar includes a user profile icon, a gear icon, and links for 'Invite User', 'Manage User', and 'My Settings' (which is highlighted with a yellow box and a cursor). Below this, the 'My Settings' title is centered. Two buttons, 'Change Password' and 'Manage My Profile', are positioned next to a notification: 'Your changes will be reflected after re-login.' The page is divided into sections: 'Personal Information' with fields for First Name, Last Name, Email, and One Healthcare ID, and an 'Edit' button; 'My Associations' with a table showing 'Broker Role: Admin'; and 'Permissions' with expandable sections for 'Billing & Payment' and 'Commissions', each with a plus sign.

My Settings	
Change Password Manage My Profile	
Your changes will be reflected after re-login.	
Personal Information Edit	
First Name	
Last Name	
Email	
One Healthcare ID	
My Associations	
[Empty Row] ×	
Broker Role:	Admin
Permissions:	
Billing & Payment	+
Commissions	+

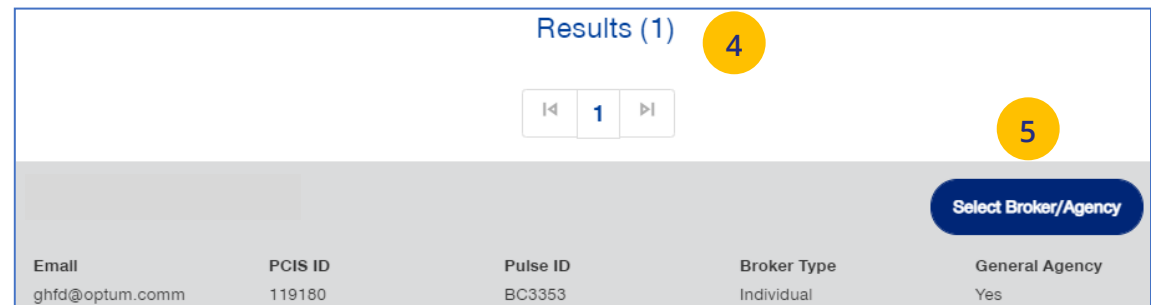
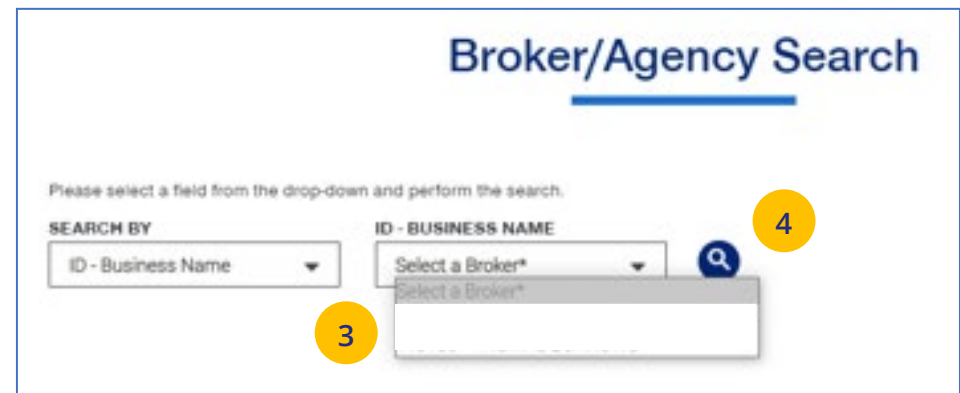
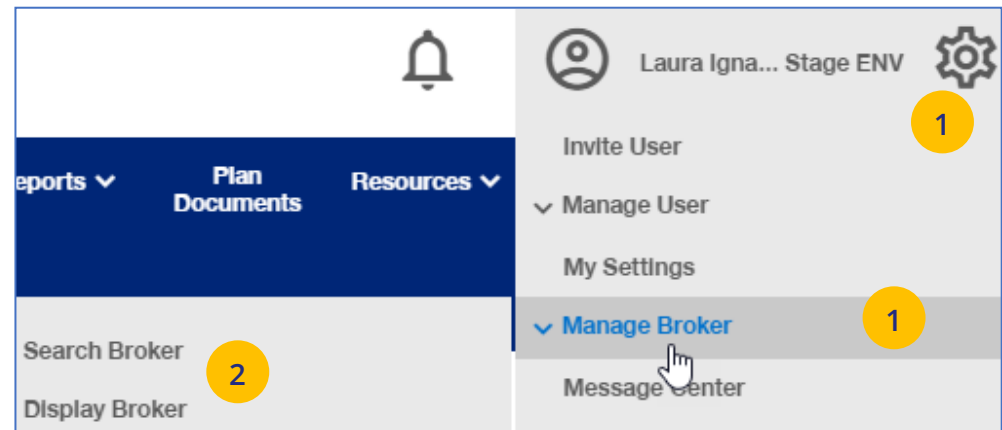


4 | Manage Broker

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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)

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

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

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

View Broker/Agency

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



4 | Manage My Profile

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

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

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

The image displays two screenshots of a web application interface. The top screenshot, titled 'My Settings', shows a navigation bar with 'Change Password' and 'Manage My Profile' buttons. The 'Manage My Profile' button is highlighted with a yellow box and a yellow circle containing the number '1'. Below this is a 'Personal Information' section with fields for First Name (Hina), Last Name (Hinaemp), Email (chintakayala_bhavani1@optum.com), and Optum ID (Hinaemp). An 'Edit' button is located to the right. The bottom screenshot, titled 'Manage My Profile', shows a three-step process bar: '1 Direction', '2 Selection', and '3 Review & Submit'. The '2 Selection' step is active. Below the bar, a question asks 'What would you like to do with your One Healthcare ID - Hinaemp'. Two radio button options are listed: 'Move my associations from another One Healthcare ID into this One Healthcare ID' and 'Move my associations to another One Healthcare ID'. The first option is selected and highlighted with a yellow box and a yellow circle containing the number '2'. At the bottom, there are 'Cancel' and 'Next' buttons, with the 'Next' button highlighted by a yellow box and a yellow circle containing the number '2'. A link to 'FAQs' is also visible on the right side of the second screenshot.



4 | Manage My Profile (continued)

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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**.

Manage My Profile

✓ Direction 2 Selection 3 Review & Submit

What would you like to do with your One Healthcare ID - Hinaemp [FAQs](#)

☐ Move my associations from One Healthcare ID(s) that match my name/email

One Healthcare ID All ☐

Hinaemp2
Hinaemp3
Hinaemp10
Hinaemp123
Hinaemp8
Hinaemp9
Hinaemp6
Hinaemp7
Hinaemp4

Or

☐ Move my associations from another One Healthcare ID I own

One Healthcare ID

Password

Cancel Previous Next



4 | Manage My Profile (continued)

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

This screenshot shows the 'Review & Submit' step of a three-step process. The progress bar at the top indicates 'Direction' and 'Selection' are complete, while 'Review & Submit' is the current step, marked with a '3' in a circle. Below the progress bar, a message asks the user to confirm moving associations to their One Healthcare ID - Hinaemp. A list of associations is shown, with 'Louis Agency - 99999' highlighted. A yellow circle with the number '6' points to the 'Submit' button in the bottom navigation bar, which also includes 'Cancel' and 'Previous' buttons.

This screenshot shows the success message after the 'Submit' action. The progress bar at the top now shows 'Direction', 'Selection', and 'Review & Submit' as complete steps, with 'Review & Submit' marked with a checkmark in a circle. A yellow circle with the number '6' points to a success message box that says 'Your move was successful. Please log off and log back in.' Below this message, a yellow circle with the number '7' points to the 'Log off' button in the bottom navigation bar.



4 | Roles and Permissions (My Associations)

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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.
 - Click the plus sign **+** to expand the category to view specific permissions within that category.

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

My Associations 1

Louis Agency - 99999

Broker Role: Admin

User Role: Broker Lead with User Maintenance

Permissions: 2

Billing & Payment +

Commissions +

Member Management x

Add Member

Request ID card

Term Member

Update Member

View Eligibility

View Member

Quoting & Renewals x

Quoting

Renewal

Renewal Package

Reports x

Banking Reports

Delinquent Employer Accounts

Level Funded Reporting



4 | View and Update Broker Contact Information

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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."**

The image displays two screenshots of the 'Contact Information' form. The top screenshot shows the 'Contact Information' header with an 'Edit' button highlighted by a yellow circle with the number 1. The bottom screenshot shows the 'Go Green' field with 'Yes' and 'No' radio buttons, where the 'No' button is selected. A yellow circle with the number 2 points to the 'Go Green' label. Below this are input fields for 'Business Email', 'Business Phone', 'Business Phone Ext', 'Business Fax', and 'C/O'. A yellow circle with the number 3 points to the 'Business Phone' field. At the top right of the bottom screenshot, a yellow circle with the number 4 points to the 'Save' and 'Cancel' buttons. A note above these buttons states: 'Please note that this contact information will apply to the Broker ID and all associated users.'

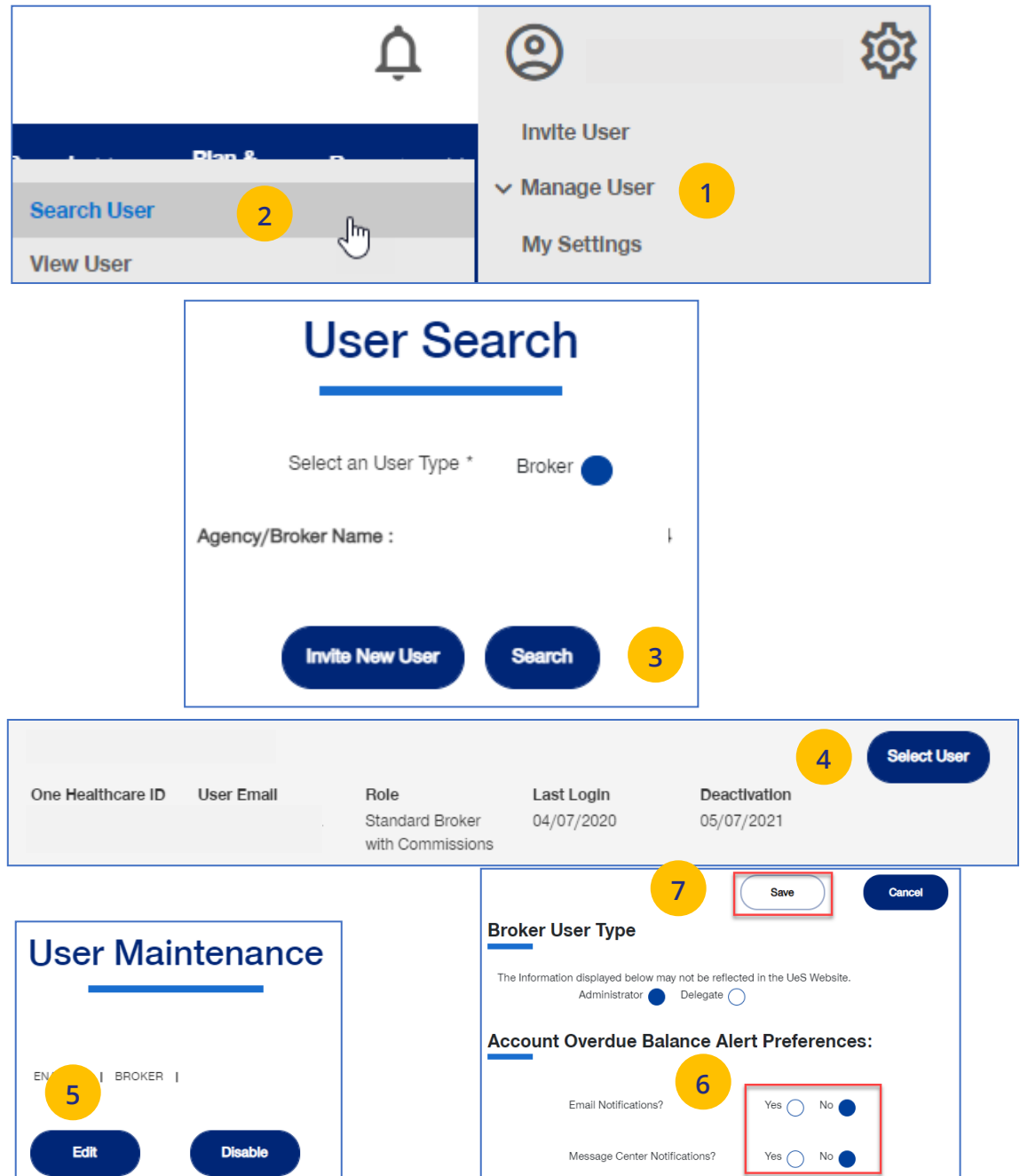


4 | Update a User's Account Overdue Balance Alert Preferences

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

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



The screenshot illustrates the process of updating a user's account overdue balance alert preferences through the Manage Broker interface. The interface is divided into several sections:

- Manage Broker Header:** Includes a bell icon, a user profile icon, and a gear icon (1). Below the gear icon are options: "Invite User", "Manage User" (2), and "My Settings".
- User Search Screen:** Displays "Select an User Type *" with "Broker" selected (3). Below is a search bar labeled "Agency/Broker Name :". At the bottom are "Invite New User" and "Search" buttons (4).
- User Maintenance Table:** A table with columns: "One Healthcare ID", "User Email", "Role", "Last Login", and "Deactivation". The first row shows a user with role "Standard Broker with Commissions", last login "04/07/2020", and deactivation "05/07/2021". A "Select User" button (5) is next to the table.
- User Maintenance Edit Screen:** Shows "Edit" and "Disable" buttons (6).
- Broker User Type Section:** Includes a "Save" button (7) and a "Cancel" button. Below is a section for "Account Overdue Balance Alert Preferences" with radio buttons for "Email Notifications?" and "Message Center Notifications?" (8).



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.



Invite User

▼

Manage User

▼

My Settings

▼

Manage Broker

▼

Message Center

Logout





1





Home

Small Group Quote & Renewals

Manage Members

Billing & Payment

Plan & Rate Information

Reports

Small Group Renewal Packages

Commissions

Resources

Message Center

SORT BY:

Date Descending

Delete Selected

1

☐	Date/Time	From	Subject	
	2023-03-14 12:10:28.0	uhceservices.com	Member Subscriber List	+

5 | Group Selection

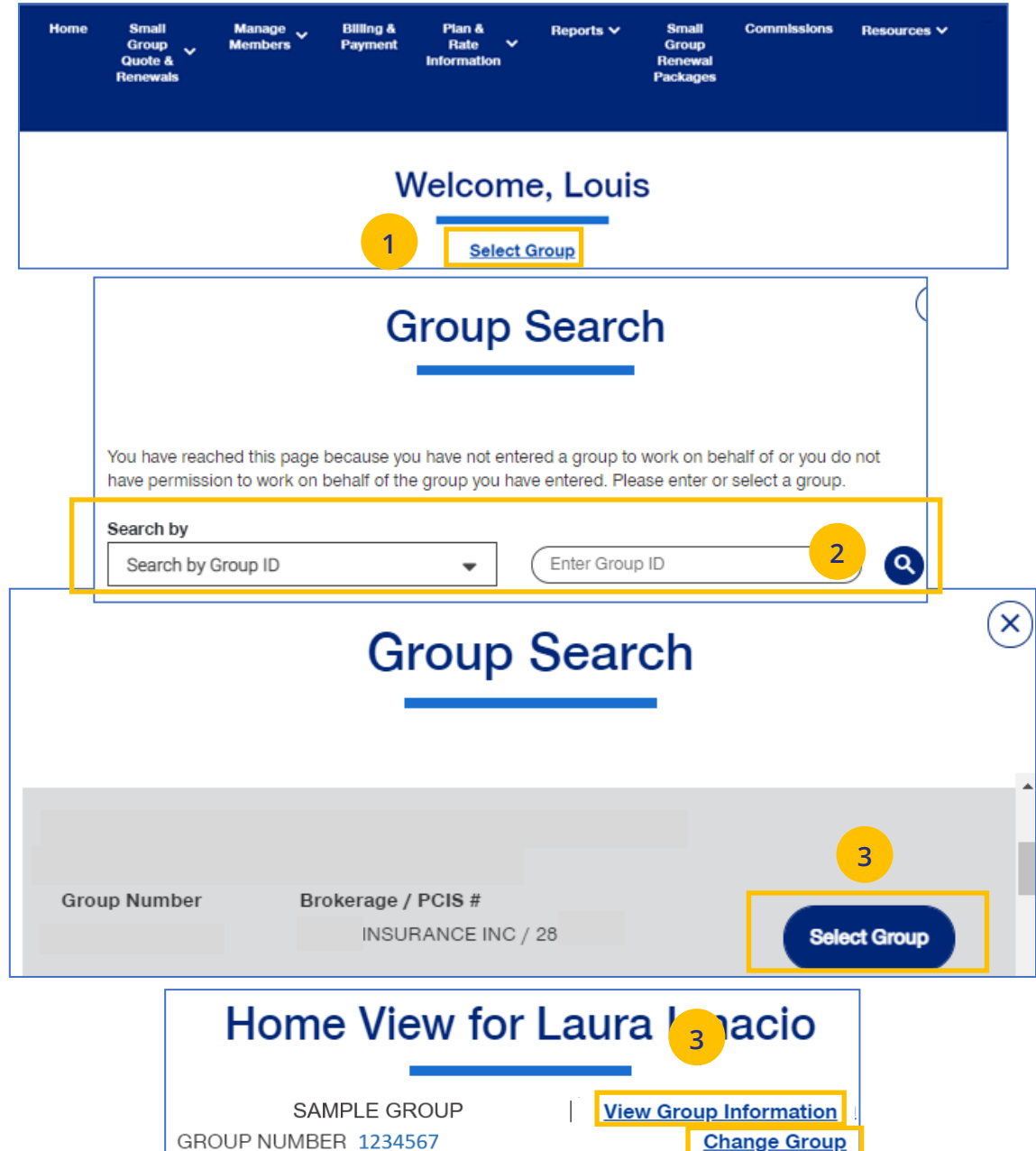
To select a group from the Home page:

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

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

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

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



The screenshot illustrates the Group Selection process in three stages:

- Home Page:** The top navigation bar includes links for Home, Small Group Quote & Renewals, Manage Members, Billing & Payment, Plan & Rate Information, Reports, Small Group Renewal Packages, Commissions, and Resources. The main heading is "Welcome, Louis". A yellow circle with the number "1" highlights the "Select Group" link.
- Group Search Page:** The heading is "Group Search". A message states: "You have reached this page because you have not entered a group to work on behalf of or you do not have permission to work on behalf of the group you have entered. Please enter or select a group." A yellow circle with the number "2" highlights the search area, which includes a "Search by" dropdown menu (set to "Search by Group ID"), a text input field for "Enter Group ID", and a search icon.
- Group Search Results:** The heading is "Group Search". A table displays search results. A yellow circle with the number "3" highlights the "Select Group" button in the bottom right corner of the table.
- Home View for Laura Ignacio:** The heading is "Home View for Laura Ignacio". Below the heading, it shows "SAMPLE GROUP" and "GROUP NUMBER 1234567". A yellow circle with the number "3" highlights the "View Group Information" link. A yellow box highlights the "Change Group" link.



5 | Group Selection: PEO Groups

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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_AD_Parent4 | GROUP NUMBER : [Change Group](#)

[Select Child Group](#) 1

_CHILD2 1

Group Number

2 [Select Group](#)

_CHILD1

Group Number

[Select Group](#)

[Change Group](#) 2

[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
 - UHC Benefit Services (COBRA)
 - Employer eServices
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

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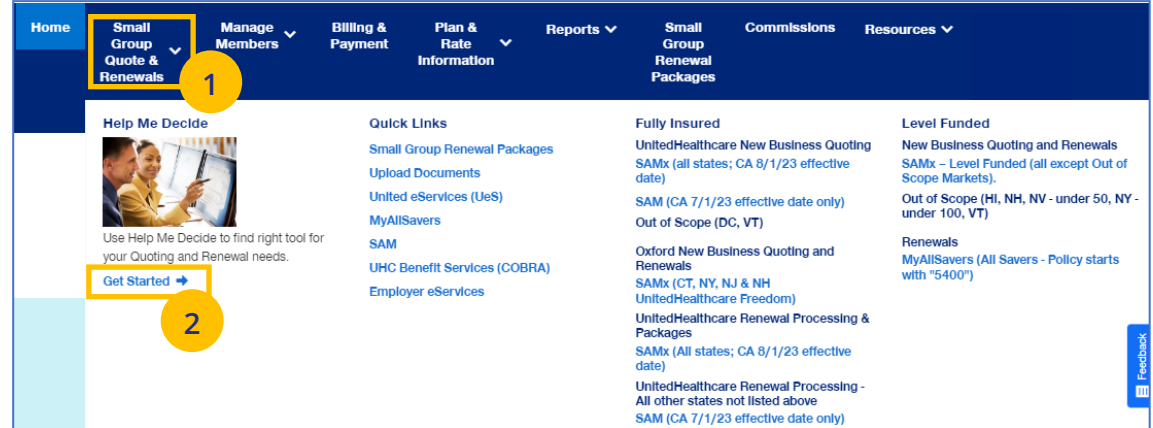


6 | Help Me Decide

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.



6 | Help Me Decide (continued)

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

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

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

- 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)

[TABLE OF CONTENTS](#)

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



5



6 | Quick Links: Small Group Renewal Packages

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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 Packages** search screen displays. You can search by **Group ID** or **Broker ID**.

To Search by Group ID:

2. Select the **Group ID** button.
3. Enter the **Group ID** in the search box and click the search icon. A link to the group's renewal document is shown.
4. Click the **Renewal Document** link to view the document.

The screenshot shows the 'Small Group Renewal Packages' search interface. At the top, a 'Quick Links' menu is visible, with 'Small Group Renewal Packages' highlighted by a yellow box and labeled with a yellow circle '1'. Below this, the main search area is titled 'Small Group Renewal Packages'. It features a search bar with a dropdown menu labeled 'Select One' and two radio buttons: 'Group ID' (selected) and 'Broker ID'. A yellow box labeled '2' highlights the search bar area. Below the search bar, there is a text input field labeled 'Enter a Group ID *' with a yellow circle '3' next to it, and a search icon (magnifying glass) also labeled with a yellow circle '3'. Below the search bar, there is a table with columns for 'Group Number', 'Renewal Date', and 'Renewal Document'. The 'Renewal Document' column has a link labeled 'Manage Renewal' highlighted by a yellow box. The table shows a single row with the value '255' in the 'Group Number' column and '02/01/2023' in the 'Renewal Date' column.



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

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To Search by Broker ID:

2. Select the **Broker ID** button.
3. Enter the Broker's **PCIS ID** in the search box and click the search icon. The package or packages will be displayed for a group or groups.

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 and a total of 1,000 renewal packages at one time. You must download the groups listed on one page at a time.

Note: Filter Results - You can also “filter” the results to narrow your search results. Using filters is recommended for agencies with many renewals. You can filter by **Group Name**, **Group ID**, **Renewal Date** or **Writing Agent**.

The screenshot displays the 'Small Group Renewal Packages' interface. At the top, there's a header with the title. Below it, a search section is highlighted with a yellow box. This section includes a 'Select One' dropdown menu with 'Group ID' and 'Broker ID' options. The 'Broker ID' option is selected and highlighted with a yellow circle labeled '2'. Below the dropdown is a search box labeled 'Enter a PCIS ID *' with a search icon. A yellow circle labeled '3' is next to the search box. Below the search section, there's a table of renewal packages. The table has columns for 'Group Number', 'Renewal Date', and 'Renewal Document'. The first row shows '1' for Group Number, '05/01/2021' for Renewal Date, and a document icon. A yellow circle labeled '3' is next to the document icon. A 'Download (0/20)' button is in the top right corner. Below the table, there's a 'Filter by' section with a 'X' icon. The filter section includes fields for 'Group Name', 'Group ID', 'Renewal Date', and 'Writing Agent'. A 'Clear Filter' button is at the bottom.

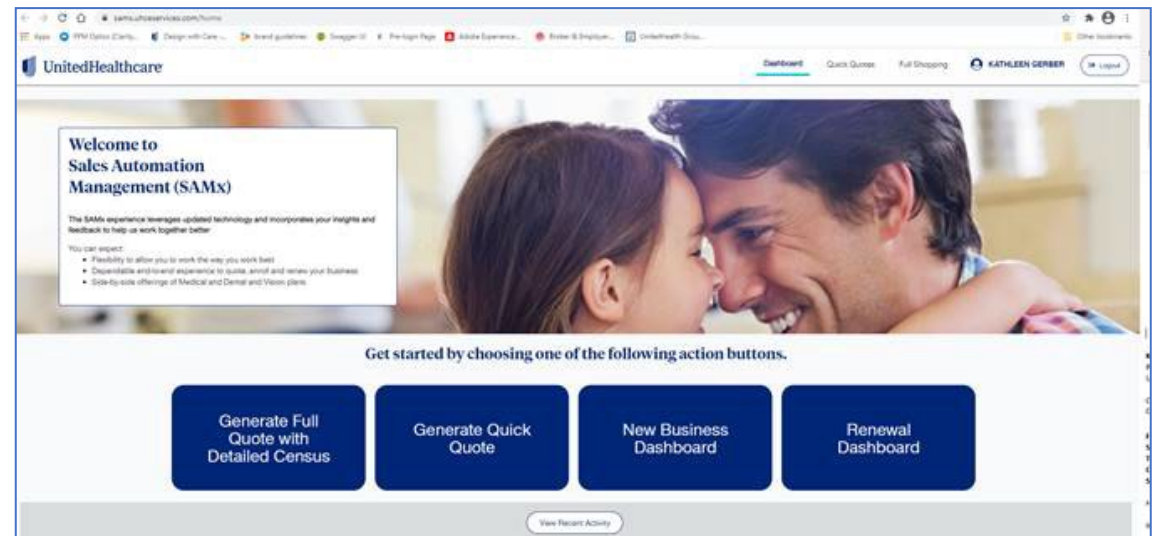
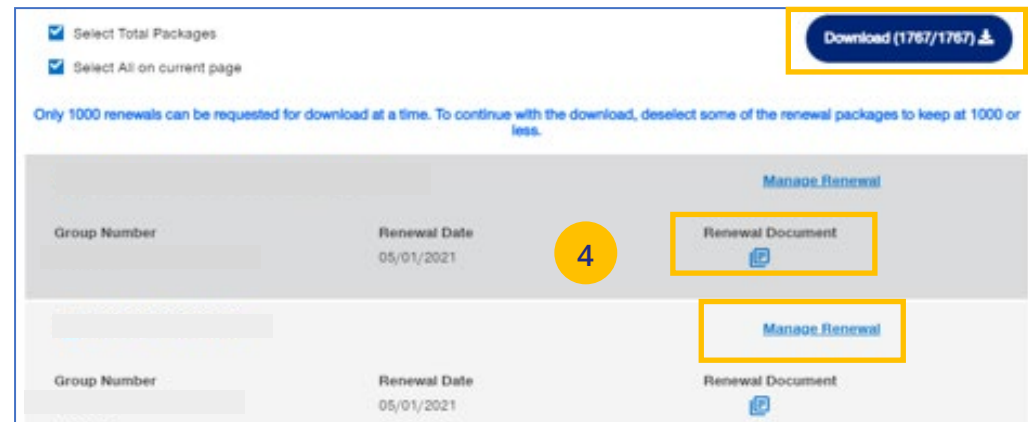


6 | Quick Links: Small Group Renewal Packages (continued)

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

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



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.



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.

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The screenshot illustrates the document upload process in three stages across three rows of the form:

- Row 1:** The 'Document Name *' dropdown menu is open, showing a list of document types: Annual Certification, Binder Check Payments and Paper Group Submission, Common Law Employee Attestation, Common Ownership Certification Form, Employer Information Form, Healthy NY Recertification, Miscellaneous, Professional Employer Association Certification Form, Religious Exemption Certification, and Wage & Tax Documents. A yellow circle with the number '2' is placed over the dropdown menu.
- Row 2:** The 'Document Name *' dropdown is closed, and 'Annual Certification' is selected. The 'Select Document for Upload *' button is highlighted with a yellow circle with the number '3'. Below the button is a text box that says 'No file chosen...'. An 'Add Row +' button is visible to the right.
- Row 3:** The 'Document Name *' dropdown is closed, and 'Annual Certification' is selected. A yellow circle with the number '4' is placed over the 'Upload' button. Below the 'Upload' button, a confirmation message is displayed: 'Document xyz.pdf successfully uploaded as ANNUAL CERTIFICATION FORM. Document ID: 02b73856-28c5-498d-bc39-b13397eff1c6'.



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**.

UnitedHealthcare® United eServices

You have been redirected to United eServices, a partner site to uhceservices. This ONE TIME action will link your United eServices access to uhceservices, allowing you to access Quoting, Renewals and Commissions. Please select the option below that reflects your experience using United eServices.

I Have a United eServices Account OR **I Do Not Have a United eServices Account**

Select this option if you already have a United eServices Username and Password.

United eServices Username
United eServices Password
SUBMIT

Forgot Your Password?

Select this option if you do not have a United eServices Username and Password.

Never had access to United eServices?
CONTINUE

Need Assistance? Call Customer Service at 1-888-201-4216

Quick Links

- [Small Group Renewal Packages](#)
- [Upload Documents](#)
- [United eServices \(UeS\)](#)
- [MyAllSavers](#)
- [SAM](#)
- [UHC Benefit Services \(COBRA\)](#)

United Healthcare United eServices

Home | Help | My Account | Logout | Administration | Contact Us | Links

Quote | Renewal | Network | Products | Help & Training | Forms | Benefits Administration | Compensation

Message Center 0 new messages (View)

SEARCH Advanced Search Search Help

Welcome Laura Ignacio Stage ENV Broker User

Useful Resources

- [COVID-19 Return to Worksite Information](#)
- [Important information for members on COVID-19 2020](#)
- [COVID-19 Special Enrollment Period](#)
- [COVID-19 FAQ](#)
- [View Benefit Summaries](#)
- [View Product Grids](#)
- [View Brochures](#)
- [View Small Group Case Install Status\(New Business only\)](#)
- [View Agency Administrator Add/Remove Form](#)
- [View Recent Summary of Benefits and Coverages Downloads and Requests](#)
- [View Your Commission Statements](#)
- [Summary of Benefits and Coverages Request Form](#)
- [Employee Engagement Planner](#)
- [Communication Resource Center](#)
- [uhc.com/broker](#)
- [Medical Loss Ratio Information](#)
- [UnitedHealthcare of the River Valley resources-Available in AR, GA, IL, IA, NC, NJ, SC, TN, and SW VA](#)
- [Submit Online Renewal Tool Feedback](#)
- [Submit Site Feedback](#)

Quick Links

SAM Sales Automation Management

SAM Quoting

Additional Tools

- [UeS New Quote](#)
- [UeS Saved Quotes](#)
- [Specialty Quick Quote](#)
- [Benefit Summaries](#)
- [Summary of Benefits And Coverages Request Form](#)
- [Product Grids](#)

* In the following situations, please continue to use your current system or process to obtain a quote:

1. Oxford business situated in NJ, NY
2. Management Carve Outs
3. New Business on Existing Accounts (NBEA): New Coverage on Existing Accounts (NCEA)
4. Business situated in: District of Columbia, HI, ME, MT, NH, NJ, NV, NY, VT
5. All Savers
6. Sierra
7. ACE

News & Rate Alerts

[View all State-Specific Alerts](#)



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

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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)

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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](#)

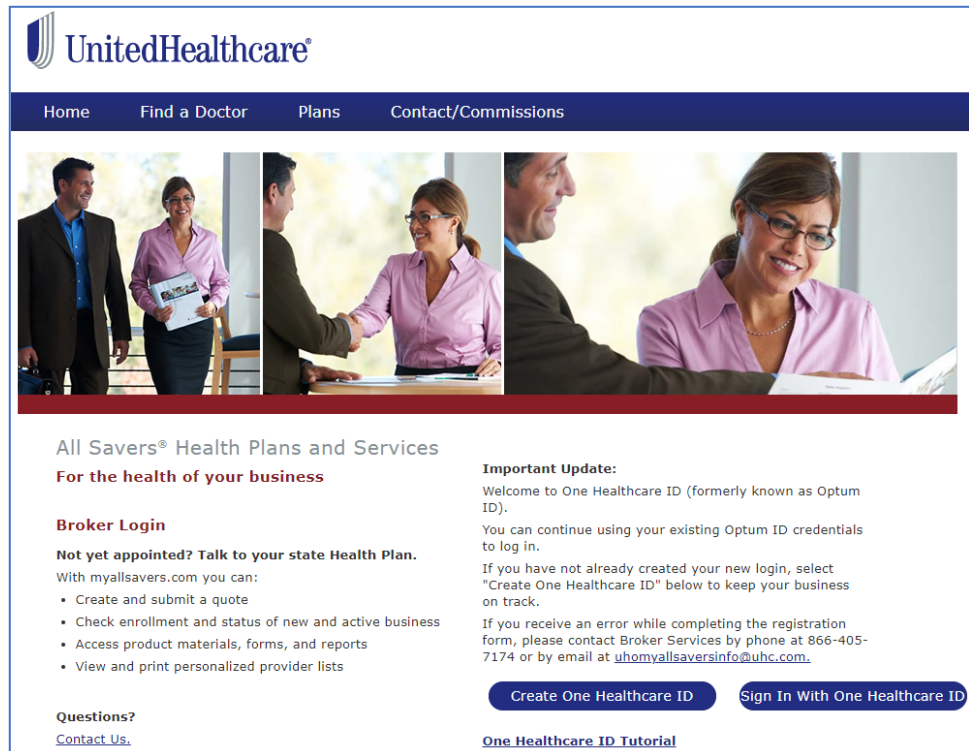
[Upload Documents](#)

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

[MyAllSavers](#)

[SAM](#)

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



The screenshot shows the UnitedHealthcare website interface. At the top is the UnitedHealthcare logo. Below it is a navigation bar with links: Home, Find a Doctor, Plans, and Contact/Commissions. The main content area features a large image of three people (two men and one woman) in a professional setting. Below the image, the text reads "All Savers® Health Plans and Services" and "For the health of your business". There are two main sections: "Broker Login" and "Important Update". The "Broker Login" section includes a link to "Not yet appointed? Talk to your state Health Plan." and a list of actions users can take with myallsavers.com. The "Important Update" section provides information about the transition from Optum ID to One Healthcare ID, including instructions on how to log in or create a new ID. At the bottom, there are buttons for "Create One Healthcare ID" and "Sign In With One Healthcare ID", along with links for "Questions?" and "One Healthcare ID Tutorial".

UnitedHealthcare®

Home Find a Doctor Plans Contact/Commissions

All Savers® Health Plans and Services
For the health of your business

Broker Login

Not yet appointed? Talk to your state Health Plan.

With myallsavers.com you can:

- Create and submit a quote
- Check enrollment and status of new and active business
- Access product materials, forms, and reports
- View and print personalized provider lists

Important Update:

Welcome to One Healthcare ID (formerly known as Optum ID).

You can continue using your existing Optum ID credentials to log in.

If you have not already created your new login, select "Create One Healthcare ID" below to keep your business on track.

If you receive an error while completing the registration form, please contact Broker Services by phone at 866-405-7174 or by email at uhomyallsaversinfo@uhc.com.

[Create One Healthcare ID](#) [Sign In With One Healthcare ID](#)

[Questions?](#)
[Contact Us.](#)

[One Healthcare ID Tutorial](#)

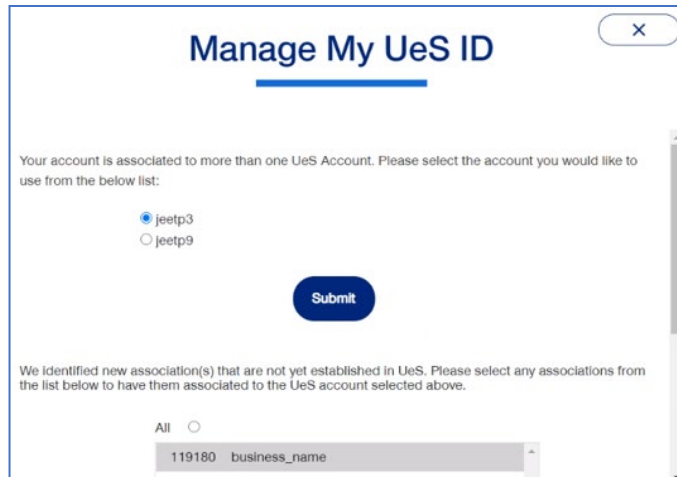


6 | Quick Links: SAM

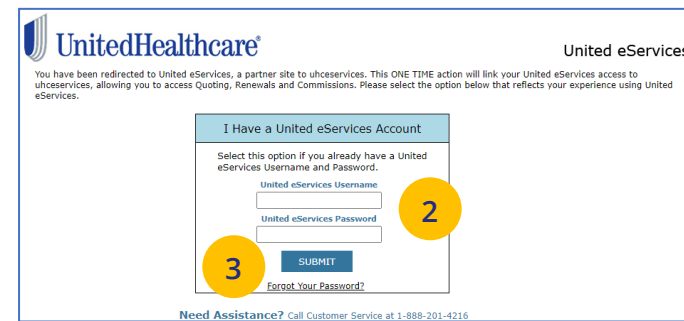
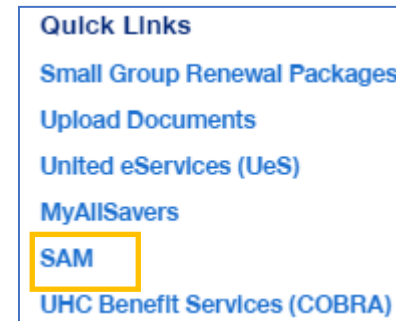
The **SAM** link allows you to sign on and access United eServices (UeS) to go into the SAM (Sales Automation Management) application.

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

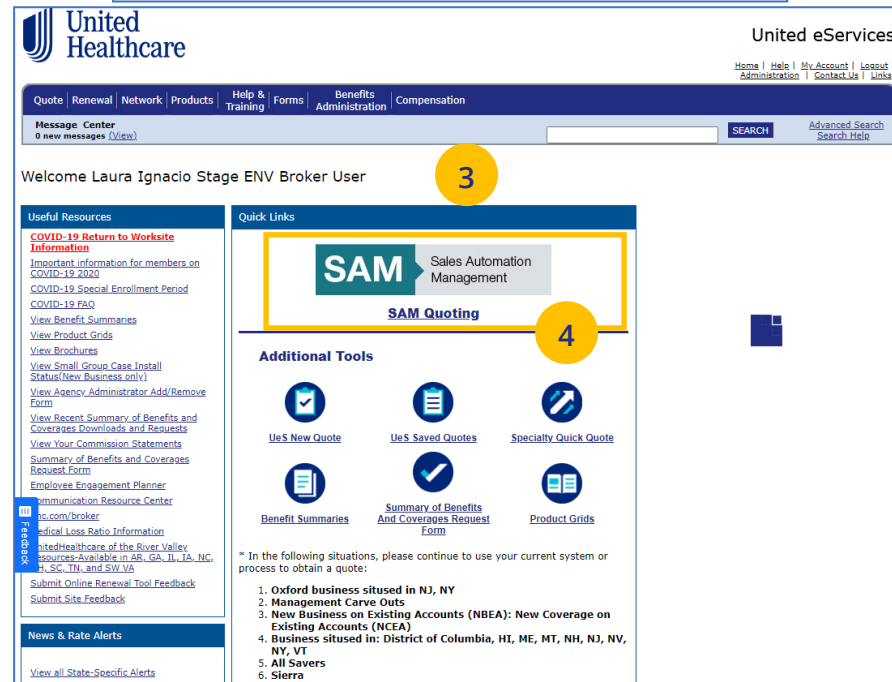
Note: Manage My UeS ID – If your UeS account is associated to more than one account, a pop-up screen displays asking you to select the account you want to use. Select the account you need or select All. Then click **Submit**.



The 'Manage My UeS ID' pop-up screen has a title bar with a close button (X). The main content area states: 'Your account is associated to more than one UeS Account. Please select the account you would like to use from the below list:'. Below this, there are two radio button options: 'jeetp3' (selected) and 'jeetp9'. A blue 'Submit' button is positioned below the options. At the bottom, a message reads: '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.' Below this message is a dropdown menu with 'All' selected and a search bar containing '119180 business_name'.



The 'United eServices' sign-in screen features the UnitedHealthcare logo and the text: 'You have been redirected to United eServices, a partner site to uhcservices. This ONE TIME action will link your United eServices access to uhcservices, allowing you to access Quoting, Renewals and Commissions. Please select the option below that reflects your experience using United eServices.' Below this is a section titled 'I Have a United eServices Account' with the instruction: 'Select this option if you already have a United eServices Username and Password.' It includes input fields for 'United eServices Username' and 'United eServices Password', a blue 'SUBMIT' button, and a link for 'Forgot Your Password?'. Yellow callout circles with numbers 2 and 3 point to the password field and the SUBMIT button, respectively. A 'Need Assistance? Call Customer Service at 1-888-201-4216' link is at the bottom.



The 'United eServices' Home Page displays the UnitedHealthcare logo and the title 'United eServices'. A navigation bar includes links for 'Quote', 'Renewal', 'Network', 'Products', 'Help & Training', 'Forms', 'Benefits Administration', and 'Compensation'. Below this is a 'Message Center' showing '0 new messages (View)'. A welcome message reads: 'Welcome Laura Ignacio Stage ENV Broker User'. A yellow callout circle with the number 3 points to this message. On the left is a 'Useful Resources' section with links for COVID-19 information, benefit summaries, and more. On the right is a 'Quick Links' section with a yellow box around the 'SAM' link (Sales Automation Management) and a yellow callout circle with the number 4 pointing to it. Below 'Quick Links' is an 'Additional Tools' section with icons for 'UeS New Quote', 'UeS Saved Quotes', 'Specialty Quick Quote', 'Benefit Summaries', 'Summary of Benefits And Coverages Request Form', and 'Product Grids'. At the bottom, a note states: '* In the following situations, please continue to use your current system or process to obtain a quote: 1. Oxford business situated in NJ, NY 2. Management Carve Outs 3. New Business on Existing Accounts (NBEA): New Coverage on Existing Accounts (NCEA) 4. Business situated in: District of Columbia, HI, ME, MT, NH, NJ, NV, NY, VT 5. All Savers 6. Sierra'.



6 | Quick Links: UHC Benefit Services (COBRA)

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

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

Quick Links

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

United Healthcare

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

Benefits services made simpler

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

Log in for individuals

Log in for administrators

Individual access

Username

Password

Login

Create an account



6 | Quick Links: Employer eServices

The **Employer eServices** link allows you to access the Employer eServices site.

1. Click the **Employer eServices** link. The Employer eServices **Log In** page displays.

Quick Links

[Small Group Renewal Packages](#)

[Upload Documents](#)

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

[MyAllSavers](#)

[SAM](#)

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

[Employer eServices](#)

Employer eServices

Employer eServices

Welcome to your benefits administration site.

[Log In](#) 1

If you experience issues logging in, click here or call Employer eServices Help Desk at 1-800-651-5465.

[View Login Help](#) →

Information You Need When You Need It

Employer eServices

- Eligibility Updates
- Pay Invoices Online
- Wellness Tools & Tips
- And More!

Enjoy a powerful suite of online tools and resources that simplify your job and create a better experience for everyone.

[Tour the New Site](#) →

What's New

COVID-19

UHC COVID-19

[View important information](#) →

Website Demo

Website Demo

[View the demo](#) →

Login Help

Login Help

[View login help](#) →



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

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

Home	Small Group Quote & Renewals	Manage Members	Billing & Payment	Plan & Rate Information	Reports	Small Group Renewal Packages	Commissions	Resources
Help Me Decide  Use Help Me Decide to find right tool for your Quoting and Renewal needs. Get Started →		Quick Links Small Group Renewal Packages Upload Documents United eServices (UeS) MyAllSavers SAM UHC Benefit Services (COBRA) Employer eServices			Fully Insured UnitedHealthcare New Business Quoting SAMx (all states; CA 8/1/23 effective date) SAM (CA 7/1/23 effective date only) Out of Scope (DC, VT) Oxford New Business Quoting and Renewals SAMx (CT, NY, NJ & NH UnitedHealthcare Freedom) UnitedHealthcare Renewal Processing & Packages SAMx (All states; CA 8/1/23 effective date) UnitedHealthcare Renewal Processing - All other states not listed above SAM (CA 7/1/23 effective date only)		Level Funded New Business Quoting and Renewals SAMx – Level Funded (all except Out of Scope Markets). Out of Scope (HI, NH, NV - under 50, NY - under 100, VT) Renewals MyAllSavers (All Savers - Policy starts with "5400")	



7 | Manage Members

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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

The screenshot shows the 'Manage Members' dropdown menu open, highlighting the following options: Member Search, View Member, Enroll Member, Update Member, Terminate Member, Request ID Card, and Reinstate Member. The background shows the 'Home View for Louis' page with a header navigation bar containing links like Home, Small Group Quote & Renewals, Manage Members, Billing & Payment, Plan & Rate Information, Reports, Small Group Renewal Packages, Commissions, and Resources. The main content area displays 'SAMPLE GROUP' and 'GROUP NUMBER 1234567' with links for 'View Group Information' and 'Change Group'.



7 | Member Search / View Member

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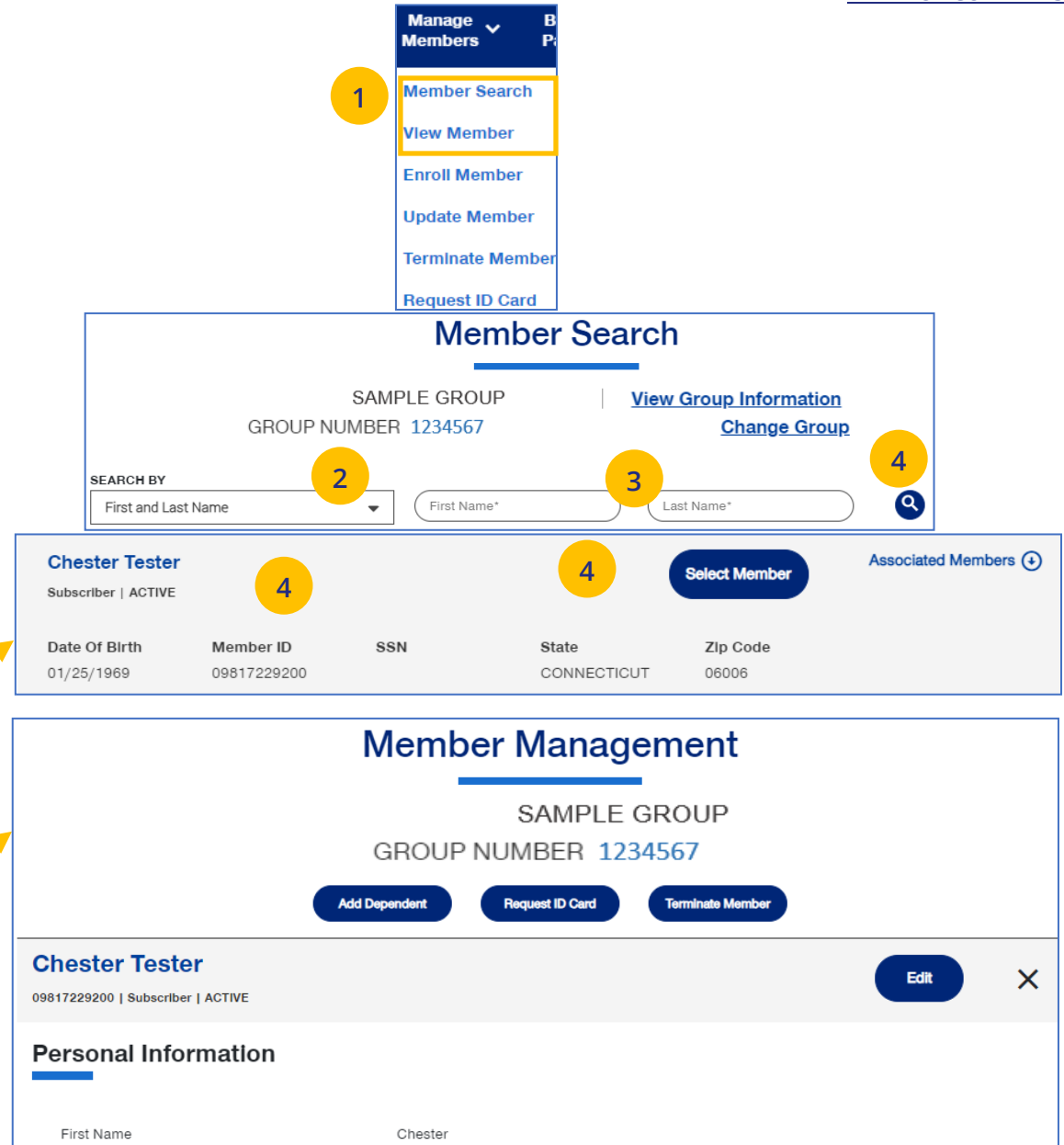
The **Member Search** and **View Member** tabs are used to search for a specific member record. **They both perform the same function.** You can search for a member using one of the following options:

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

To search for a member:

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

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



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

Member Search Section:

- 1:** A dropdown menu under "Manage Members" is shown, with "Member Search" highlighted.
- 2:** The "SEARCH BY" dropdown is set to "First and Last Name".
- 3:** The "First Name*" and "Last Name*" input fields are present.
- 4:** The search icon (magnifying glass) is located to the right of the input fields.
- Below the search fields, the "SAMPLE GROUP" is displayed with "GROUP NUMBER 1234567". Links for "View Group Information" and "Change Group" are available.

Member Management Section:

- 4:** The member's name "Chester Tester" is displayed, along with their status "Subscriber | ACTIVE".
- A "Select Member" button is located to the right of the member's name.
- Below the name, a table displays member details:

Date Of Birth	Member ID	SSN	State	Zip Code
01/25/1969	09817229200		CONNECTICUT	06006
- At the bottom, the "Personal Information" section is partially visible, showing "First Name" as "Chester".



8 | Enroll Member

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

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

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

Manage Members

1

Member Search

View Member

Enroll Member

Update Member

Terminate Member

Request ID Card

Reinstate Member

Member Enrollment

SAMPLE GROUP

GROUP NUMBER 1234567

[View Group Information](#)

[Change Group](#)

Who are you enrolling?

+o

New Member

+o

Dependent

(Add to existing family)

Cancel

8 | Enroll Member: Demographics

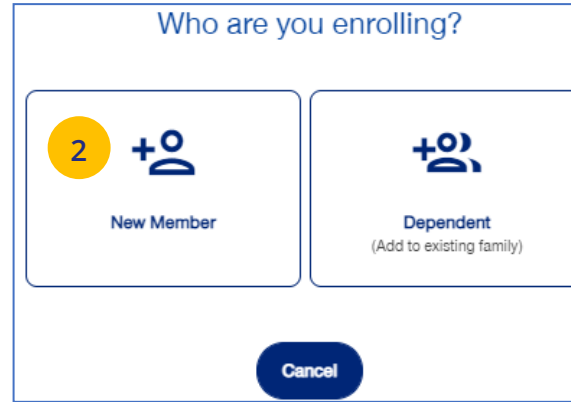
The enroll member process walks you through the **Demographics** and **Coverage** sections, then asks you to **Review & Submit** the new member information.

To enroll a new member:

- Click the **New Member** box. The **Member Enrollment** detail screen displays.
- Select the appropriate **Health Products**.
- 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.**

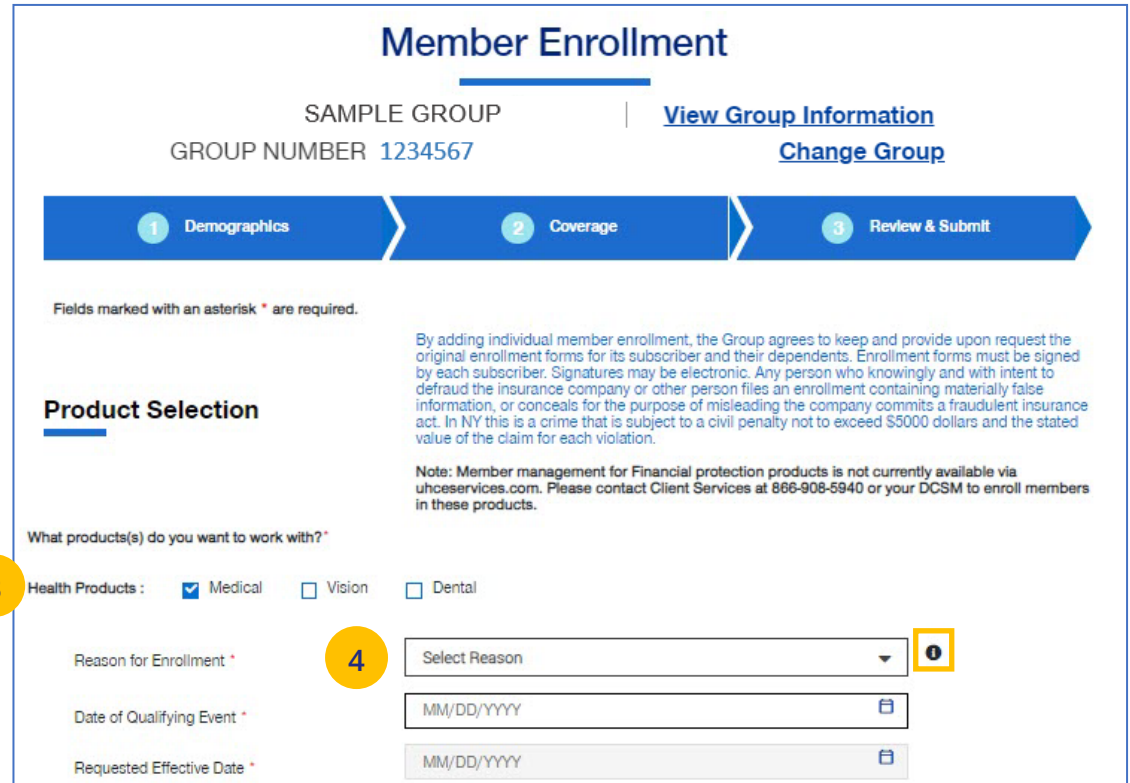


Who are you enrolling?

2 +  New Member

+  Dependent
(Add to existing family)

Cancel



Member Enrollment

SAMPLE GROUP | [View Group Information](#)

GROUP NUMBER 1234567 | [Change Group](#)

1 Demographics > 2 Coverage > 3 Review & Submit

Fields marked with an asterisk * are required.

Product Selection

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.

Note: Member management for Financial protection products is not currently available via uhceservices.com. Please contact Client Services at 866-908-5940 or your DCSM to enroll members in these products.

What product(s) do you want to work with? *

Health Products : ☒ Medical ☐ Vision ☐ Dental

Reason for Enrollment * 4 Select Reason ⓘ

Date of Qualifying Event * MM/DD/YYYY ⓘ

Requested Effective Date * MM/DD/YYYY ⓘ



8 | Enroll Member: Demographics (continued)

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5. Enter the qualifying event date in the **Date of Qualifying Event** field. A **qualifying event** is a change in life circumstances that allows you to alter an existing health insurance policy, or sign up for a new one, outside of open enrollment periods. Without a qualifying event, you would need to wait until the next open enrollment period before making any changes.

Common examples of qualifying events include the [birth](#) or adoption of a child, death of a spouse, or a change in marital status.

Enter the date in which that particular event occurred – like the date of the birth, the date of adoption, the date of death, or the date marriage of divorce.

For new hire – enter the date of hire.

For open enrollment – enter the renewal effective date.

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.

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.
- Adoption: Adopting a child qualifies for health care coverage.
- Benefit Selection: Selecting benefits during open enrollment qualifies for health care coverage.
- Birth: Having a baby 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.
- Court or Administrative Order: Being ordered by a court to support a child qualifies for adding health care coverage.
- Domestic Partner: Adding a domestic partner qualifies for adding health care coverage.
- Initial Enrollment: Adding a new member outside of the open enrollment period qualifies for health care coverage.
- Involuntary Loss of Coverage: Adding a new member outside of 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.
- Legal Guardianship: Being designated as a legal guardian qualifies for adding health care coverage.
- 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 *	New Hire
Date of Qualifying Event *	09/30/2022
Requested Effective Date *	12/01/2022

Waiting Period Rules

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



8 | Enroll Member: Demographics (continued)

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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.

- 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

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 *	New Hire	?
Date of Qualifying Event *	09/30/2022	
Requested Effective Date *	12/01/2022	

6

⚠ Waiting Period Rules

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



8 | Enroll Member: Demographics (continued)

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7. 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.

8. Enter the enrollee's contact information in the **Contact Information** fields.
9. Click **Add Dependent** or **Next**.

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

Subscriber Information

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

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

Contact Information

Home Address Line 1 *	Address Line 1
Home Address Line 2	Address Line 2
Home Zip Code *	Zip Code
Home City *	Home City
Home State *	Select State
Home Phone	(XXX) XXX-XXXX
Work Phone	(XXX) XXX-XXXX
Mobile Phone	(XXX) XXX-XXXX
Preferred Phone	Select Phone
Email Address	abc@xyz.com

8 | Enroll Member: Coverage - Medical

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

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

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

Medical Information

Plan*

HMO Provider ID* [Find Provider](#)

Current Patient Indicator ☐ Yes ☒ No

2. Click **Next**.

✓ Demographics > 2 Coverage > 3 Review & Submit

Fields marked with an asterisk * are required.

John Sunnyside
Subscriber

Medical Information

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

Would you like to change to this coverage? Yes ☒ No ☐

Billing Group*

Coverage Population*

Plan*

Provider Type

Provider Location ID [Find Provider](#)

[Add Additional Provider](#)

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



8 | Enroll Member: Coverage - Medical (continued)

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

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

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

The image displays two screenshots of the 'Medical Information' form, which is part of the 'Coverage' step (Step 2) in the enrollment process. The top screenshot shows the initial state where the 'PV' (Plan Variation) and 'RC' (Reporting Code) fields are empty, with dropdown menus labeled 'Select PV' and 'Select RC'. A 'Find Coverage' button is visible at the bottom right. The bottom screenshot shows the form after selection, with 'PV' and 'RC' both set to '0005 - NON-UNION_1'. The 'Find Coverage' button is now highlighted with a yellow box. Below this, the 'Billing Group' field is populated with '1193101-BILLGROUP'. The 'Plan' field is still empty with a 'Select Plan' dropdown. The 'Provider Type' field is also empty with a 'Select Provider Type' dropdown. The 'Provider Location ID' field is empty with a 'Provider Location ID' dropdown. A 'Find Provider' button is located at the bottom right of the second screenshot.



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

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

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

2. Click **Next**.

Dental Information

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

Would you like to change to this coverage? Yes ☒ No ☐

Billing Group *1362976-Bill Group Desc

Coverage Population *POP1 - POP1

Plan *26071100 - plan dental | Dental OP604

Vision Information

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

Would you like to change to this coverage? Yes ☒ No ☐

Billing Group *1362976-Bill Group Desc

Coverage Population *POP1 - POP1

Plan *26071101 - plan vision | Vision VH076

Basic Life Information

Would you like to change to this coverage? Yes ☒ No ☐

Billing Group *1362976-Bill Group Desc

Coverage Population *Select Population

Plan *Select Plan

AD&D Information

Billing Group *1362976-Bill Group Desc

Plan *Select Plan

Cancel

Previous

Next

8 | Enroll Member: Review & Submit

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1. Review the information. If edits are needed on any of the information shown, click **Edit**.
2. If all the information is correct, scroll down and click **Submit**. A confirmation message displays telling you that **"Member Enrollment is successful."** You will see the Member ID number and a link to the Member Record.

Evidence of Insurability for Basic Life – If enrolling a member who has **Basic Life** coverage, the **Evidence of Insurability (EOI) form** will be attached when you get the **Enrollment Successful** message.

Basic Life Information

 **Member Enrollment is successful!**

Member ID	
Requested Coverage Effective Date	06/01/2023
Actual Coverage Effective Date	06/01/2023
Transaction Id	3362BF73-7D6A-4F1C-AABA-1453D796C5C8
Evidence Of Insurability	 Subscriber EOI Form

After submitting the form, you can check the **status** on the **Member Management** screen.

Purple Cup
62694147600 | Subscriber | ACTIVE 

Basic Life

Coverage Period	06/01/2023 -
Billing Group	1365201 - Bill Group Desc
Plan	BL0088 - plan1 bl
EOI Status	Pending
Plan Documents	 Member Handbook

 **Demographics**  **Coverage** **3** **Review & Submit**

Reason For Enrollment 

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

Coverage **1** 

Medical Information

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

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

 **2**

Enrollment Status

John Sweetwater
Subscriber 

Medical Information

 **Member Enrollment is successful!**



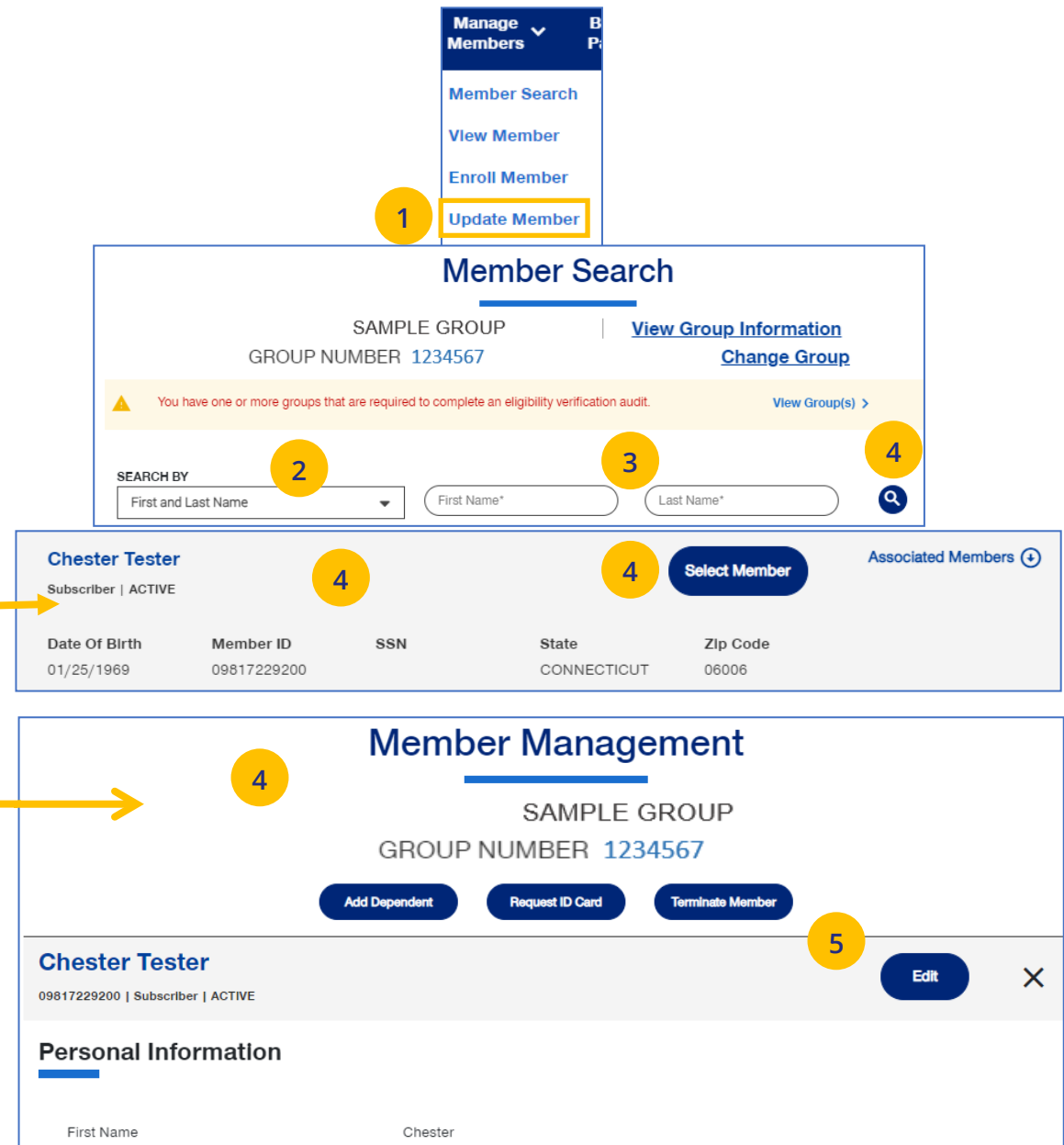
7 | Update Member

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

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

To search for and edit member information:

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



The screenshot illustrates the 'Update Member' process in two main sections: 'Member Search' and 'Member Management'.

Member Search Section:

- 1:** A dropdown menu labeled 'Manage Members' is open, showing options: 'Member Search', 'View Member', 'Enroll Member', and 'Update Member' (highlighted with a yellow box).
- 2:** The 'SEARCH BY' dropdown menu is set to 'First and Last Name'.
- 3:** The 'First Name*' input field is highlighted.
- 4:** The 'Last Name*' input field is highlighted.
- A search icon (magnifying glass) is located to the right of the input fields.
- Below the search fields, there is a message: 'You have one or more groups that are required to complete an eligibility verification audit.' with a 'View Group(s) >' link.

Member Management Section:

- 4:** A card for 'Chester Tester' (Subscriber | ACTIVE) is shown. It includes fields for 'Date Of Birth' (01/25/1969), 'Member ID' (09817229200), 'SSN', 'State' (CONNECTICUT), and 'Zip Code' (06006). A 'Select Member' button is highlighted with a yellow circle.
- 5:** The 'Member Management' screen for 'Chester Tester' (09817229200 | Subscriber | ACTIVE) is shown. It includes buttons for 'Add Dependent', 'Request ID Card', and 'Terminate Member'. The 'Edit' button is highlighted with a yellow circle.

7 | Update Member (continued)

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- 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.

- 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

X

Subscriber Information

6

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

7

Save and Continue



7 | Update Member (continued)

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

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

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

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

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

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

Member Update

| GROUP NUMBER :

✓ Demographics

2 Coverage

3 Review & Submit

Updates saved successfully.

Louis Dylan
Subscriber | FUTURE

Coverage Effective Date

Requested Effective Date

MM/DD/YYYY

Medical Information

Would you like to change to this coverage?

Yes ☐ No ☒

Cancel or Exit

Previous

9 Save & Continue

10 Submit



Changes submitted successfully.



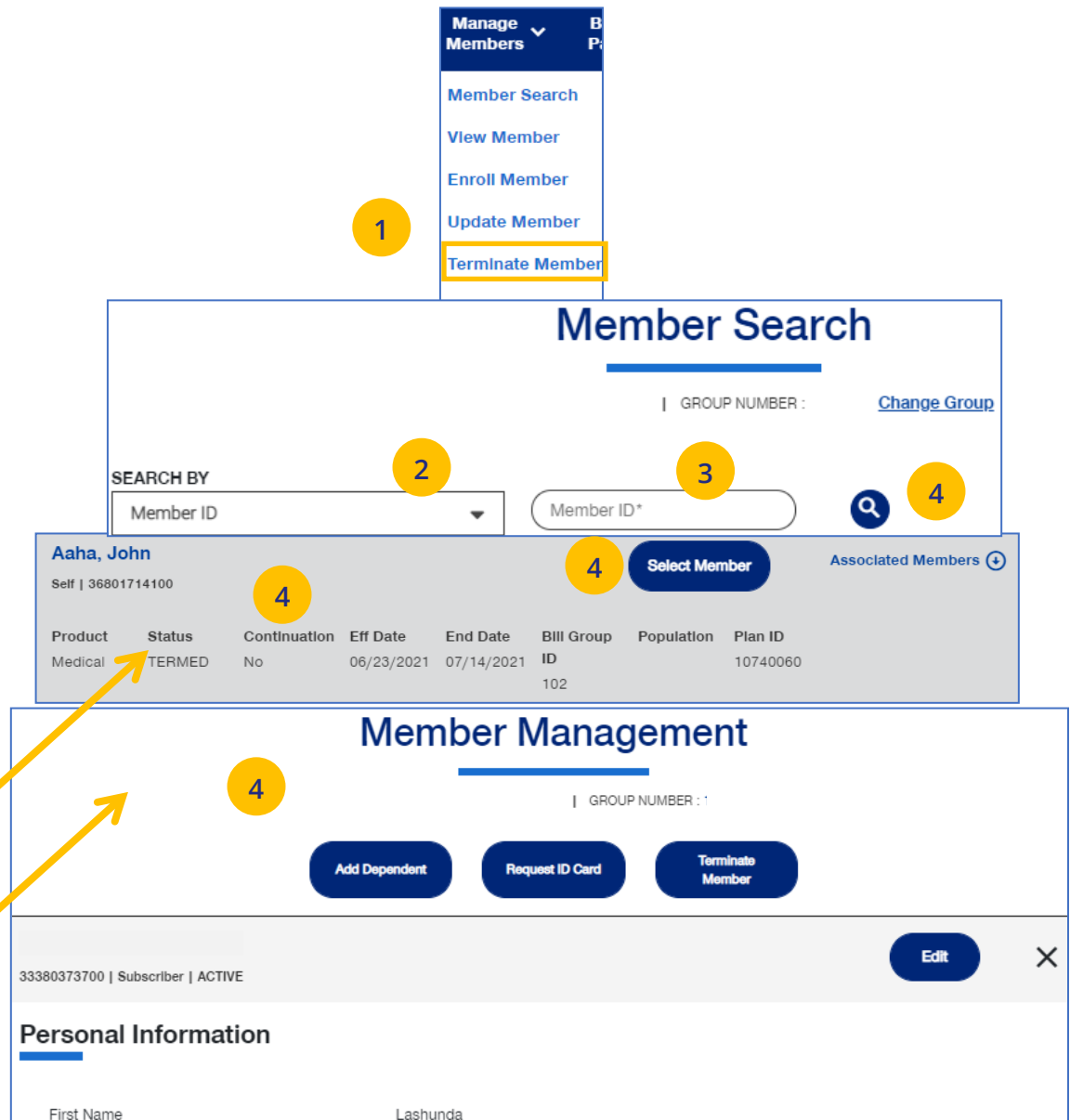
7 | Terminate a Member's Coverage

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

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

To search for and terminate a member:

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



The screenshot shows the 'Manage Members' dropdown menu with 'Terminate Member' highlighted (1). Below is the 'Member Search' section with a 'SEARCH BY' dropdown set to 'Member ID' (2), a search input field with 'Member ID*' (3), and a search icon (4). The search results show 'Aaha, John' with a 'Select Member' button (4). Below this is the 'Member Management' section with buttons for 'Add Dependent', 'Request ID Card', and 'Terminate Member'. The 'Personal Information' section shows 'First Name' as '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)

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- Click **Terminate Member**. The **Terminate Member Benefits** screen displays.
- 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**.

- 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.

- 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 [Edit](#) [X](#)

54867991300 | Subscriber | FUTURE

Personal Information

Terminate Member Benefits

GROUP NUMBER :

Reason for Termination

Termination Reason* 6

Requested Termination Date* 7 [Help with Determining Date](#) 8

Waiting Period Rules

8

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



7 | Terminate a Member's Coverage (continued)

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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 ☒ Medical
Jane Doe Spouse Female	Member ID 70514124401	Date of Birth 02/01/1972	Effective Date 04/01/2020	Status ACTIVE	Select ☒ Medical
Jonathan Doe Child Male	Member ID 70514124402	Date of Birth 07/19/2001	Effective Date 04/01/2020	Status ACTIVE	Select ☒ Medical
Janet Doe Child Female	Member ID 70514124403	Date of Birth 08/11/2006	Effective Date 04/01/2020	Status ACTIVE	Select ☒ Medical
Jack Doe Child Male	Member ID 70514124404	Date of Birth 08/08/1998	Effective Date 04/01/2020	Status ACTIVE	Select ☒ 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.

Cancel

Next

10



7 | Terminate a Member's Coverage (continued)

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

Note: Print Termination Confirmation

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

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

9

Terminate Member Benefits

| GROUP NUMBER :

Member Information

Please confirm that following information is correct and click Terminate.

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

10

Terminate

Cancel

< Member Management

Termination Confirmation

| GROUP NUMBER :

Member Information ⓘ

You may want to print this page for your records.

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

10

Return



7 | Request a Health Plan ID Card

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

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

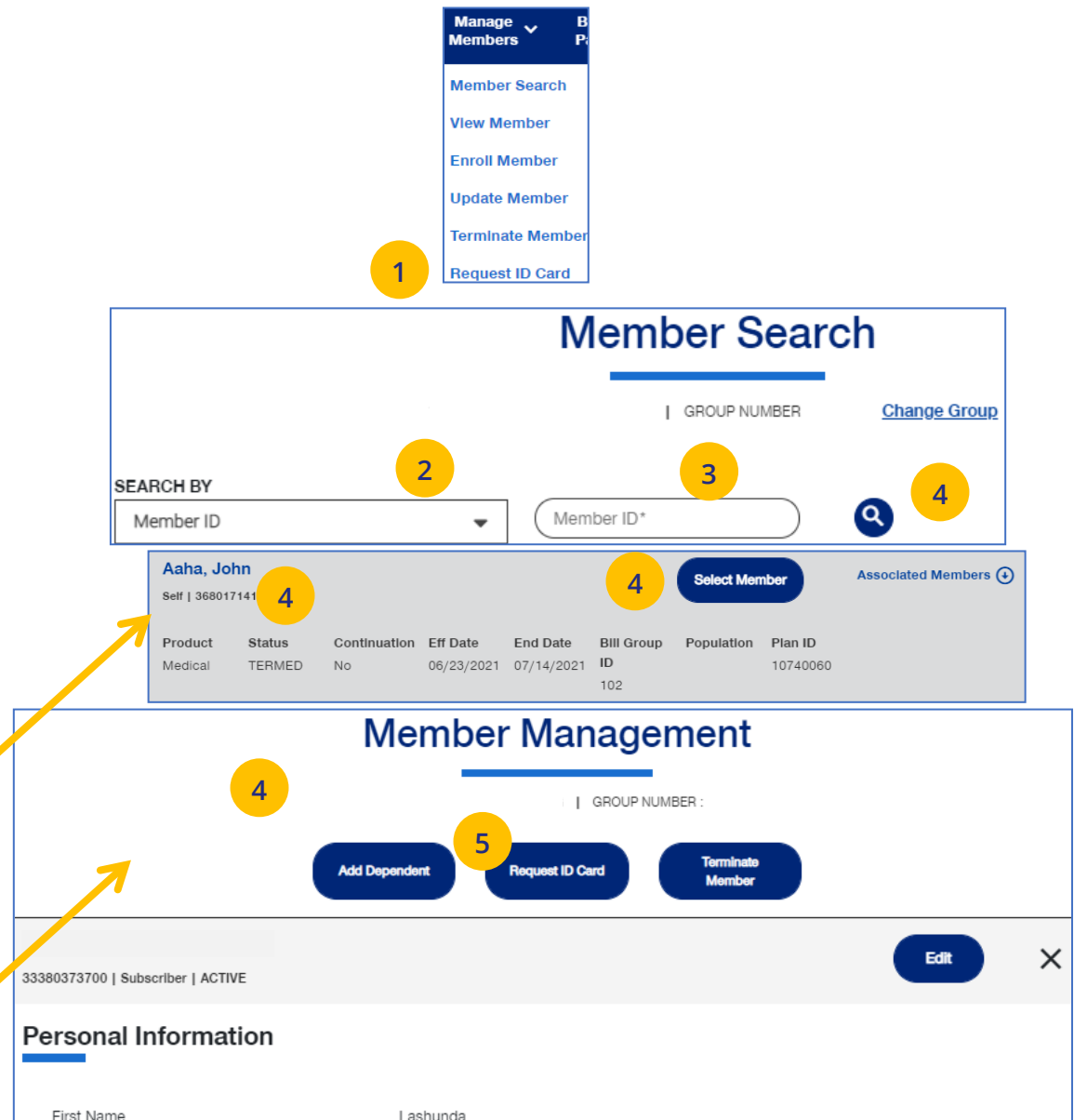
To Request an ID Card:

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

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

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

5. Click **Request ID Card**.



The screenshot shows the 'Manage Members' dropdown menu with 'Request ID Card' highlighted (1). Below is the 'Member Search' form with a 'SEARCH BY' dropdown set to 'Member ID' (2), a search input field with 'Member ID*' (3), and a search icon (4). The search results show 'Aaha, John' with a 'Select Member' button (4). Below the results is the 'Member Management' screen for 'Aaha, John' (4), which includes a table of member details and buttons for 'Add Dependent' (4), 'Request ID Card' (5), and 'Terminate Member'. The 'Personal Information' section shows 'First Name' as 'Lashunda'.

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



7 | Request a Health Plan ID Card (continued)

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

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

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

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



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

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. Printed ID Cards are available 48 hours after the effective date. Updates to demographic information on existing members will be available for Printed ID Cards after 8 hours.

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

☐	TermedSameAddr bbb Child - DOB 03/01/2005	Current Coverage Start 03/01/2022
☐	kyle barnes Subscriber - DOB 01/01/2000	Future Coverage Start 05/01/2022
☐	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

Request sent successfully.



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

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

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

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

The screenshot displays the 'Member Search' interface. At the top, a 'Manage Members' dropdown menu is open, showing options: 'Member Search', 'View Member', 'Enroll Member', 'Update Member', 'Terminate Member', 'Request ID Card' (highlighted with a yellow box and a yellow circle with the number 1), and 'Reinstate Member'. Below this, the 'Member Search' section has a 'GROUP NUMBER :' field and links for 'View Group Information' and 'Change Group'. There are two main sections for requesting ID cards: 'Request Individual ID cards' and 'Request ID Cards for all group members'. The 'Request ID Cards for all group members' section features a 'Download Group IDs' button with a download icon, highlighted with a yellow box and a yellow circle with the number 2. A note at the bottom states: 'Group ID downloads are only available for Level Funded Medical plans. Please contact us at 866-908-5940 for all other ID card requests'. A second 'Request ID Cards for all group members' section at the bottom also shows a 'Download Group IDs' button and a message: 'We have received your request. The medical ID card PDFs will be posted in message center when ready. Please note that if not available immediately, it can take up to 24 hours to process.'



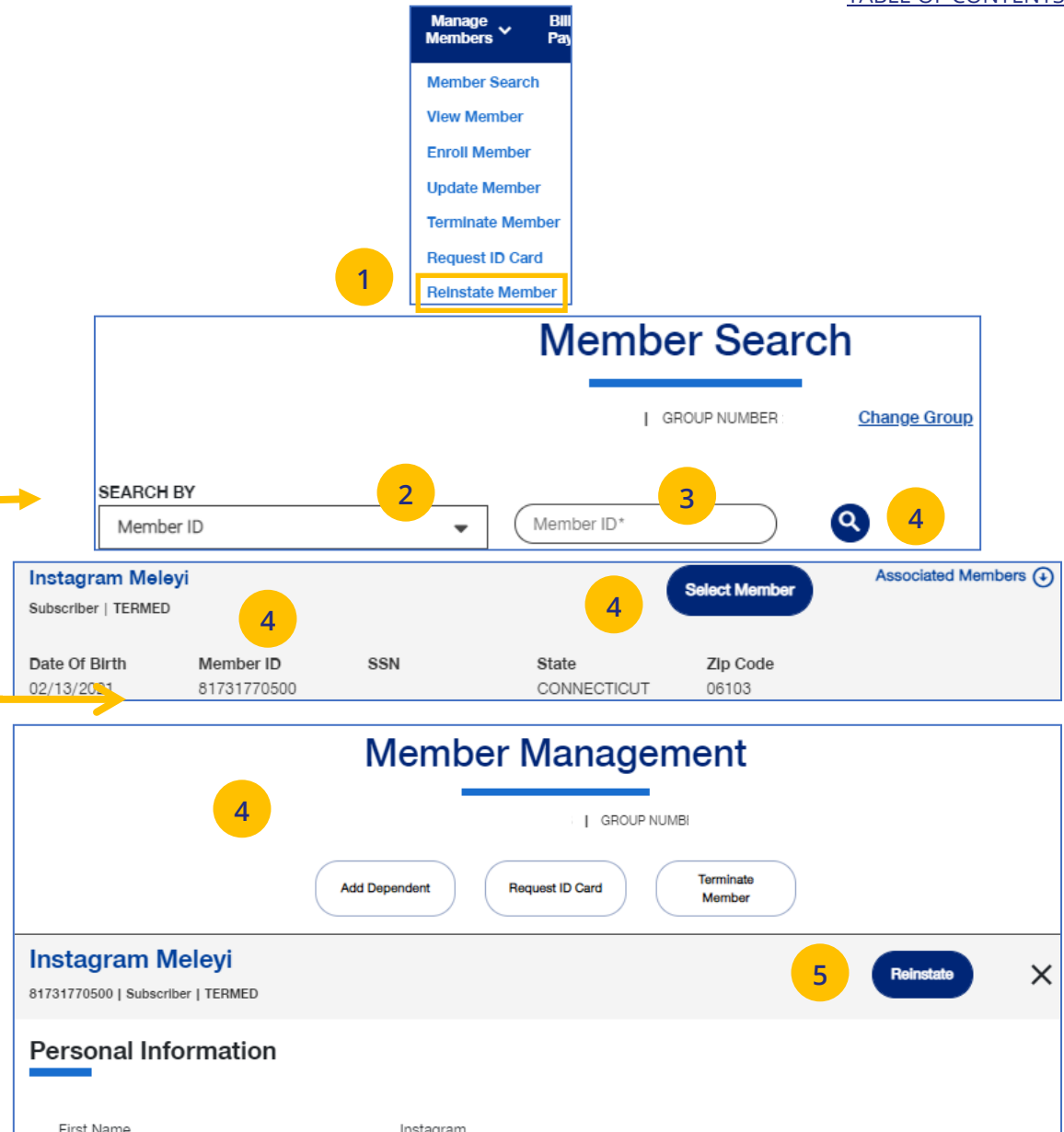
7 | Reinstate Member

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

To search for and reinstate a termed member:

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



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

Member Search Section:

- 1:** A dropdown menu under "Manage Members" is open, showing options like "Member Search", "View Member", "Enroll Member", "Update Member", "Terminate Member", "Request ID Card", and "Reinstate Member". The "Reinstate Member" option is highlighted with a yellow box.
- 2:** The "SEARCH BY" dropdown menu is set to "Member ID".
- 3:** The search input field contains "Member ID*".
- 4:** The search icon (magnifying glass) is clicked.

Member Management Section:

- 4:** The member details for "Instagram Meleyi" are displayed, including "Subscriber | TERMED", "Date Of Birth 02/13/2021", "Member ID 81731770500", "SSN", "State CONNECTICUT", and "Zip Code 06103". A "Select Member" button is visible.
- 5:** The "Reinstate" button is highlighted in the "Member Management" section.



7 | Reinstate Member (continued)

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

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

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

7. 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

6

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 *

Select Reason

Date of Qualifying Event *

MM/DD/YYYY

Requested Effective Date *

MM/DD/YYYY

Instagram Meleyi

Subscriber | TERMED

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

Subscriber Information

First Name*

Instagram

Cancel

Save and Continue

7



7 | Reinstate Member (continued)

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

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

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

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

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

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

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

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

Member Update

GROUP NUMBER :

✓ Demographics

2 Coverage

3 Review & Submit

Updates saved successfully.

kath Bennett

Subscriber | ACTIVE

Coverage Effective Date

Requested Effective Date

MM/DD/YYYY

Medical Information

Do you want to reinstate this coverage?

Yes ☐ No ☒

Billing Group *

1030902 - CT LIBERTY HMO GATED BASE PLAN

Plan *

10740060 - CT LIBERTY HMO GATED BASE PLAN | CT LIBERTY

Provider Effective Date

06/10/2021

Provider Type *

PCP

Provider Location ID *

4576279

Find Provider

PCP

4576279

Cancel or Exit

Previous

9 Save & Continue

10 Submit



Changes submitted successfully.



8 | Billing & Payment

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

1. Click the **Billing & Payment** tab. The **Billing & Payment** selection screen displays.
2. You have two options:
 - Click **Pay as Billed** to go through a series of screens to pay the bill, **or**
 - 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.



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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.
3. Make changes (if needed) and click **Review & Submit**.

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The screenshot displays the 'Billing & Payment' section of a web application. The top navigation bar includes links for Home, Small Group Quote & Renewals, Manage Members, Billing & Payment (highlighted with a yellow box and a yellow circle with the number 1), Reports, Small Group Renewal Packages, Commissions, and Resources. The main content area is titled 'Billing & Payment' (also with a yellow circle 1) and shows 'SAMPLE GROUP' and 'GROUP NUMBER 1234567'. It includes links for 'View Group Information' and 'Change Group'. A note states: 'Amount Due reflects the sum of all invoices and adjustments that have a due date of (today) or a past date.' The 'Amount Due' is displayed as '\$202,862.97'. At the bottom of this section, there is a 'Go to Billing Home' link and a 'Pay as Billed' button (highlighted with a yellow box and a yellow circle with the number 2). Below this is the 'Select Payment Options' section. It shows the 'Amount Due' as '\$202,862.97' with an information icon. The 'Payment Method' is set to 'PCM FRB' in a dropdown menu, with an 'Add Payment Method' link below it. The 'Date' is set to '07/18/2023' with a calendar icon. At the bottom of this section, there is a 'Cancel' button and a 'Review & Submit' button (highlighted with a yellow box and a yellow circle with the number 3).

Home Small Group Quote & Renewals Manage Members **Billing & Payment** Reports Small Group Renewal Packages Commissions Resources

Billing & Payment

SAMPLE GROUP | [View Group Information](#)
GROUP NUMBER 1234567 [Change Group](#)

Amount Due reflects the sum of all invoices and adjustments that have a due date of (today) or a past date.

Amount Due: **\$202,862.97**

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

Select Payment Options

Amount Due: **\$202,862.97**

Payment Method: PCM FRB [Add Payment Method](#)

Date: 07/18/2023

Cancel **Review & Submit**



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

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- 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
PCM FRB	\$202,862.97	07/18/2023

Back

4

Submit Payment

 **Thank you for your payment!**

4

Your payment information has been scheduled successfully. The confirmation number for this payment is 036710177560. 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: PROSPECT CAPITAL MANAGEMENT LP
Group Number: 1248476

Confirmation PDF 

Total Payment: \$202,862.97

Confirmation Number: 036710177560

Payment Account: PCM FRB

Payment Submitted Date: 07/18/2023

Payment Date: 07/18/2023

Invoice Date	Invoice Number	Due Date	Bill Group	Total Amount Due	Amount Paid	Reason Code
06/07/2023	327041105086	07/01/2023	2211	\$17,819.35	\$17,819.35	Pay as billed
06/07/2023	327001106772	07/01/2023	2212	\$2,562.68	\$2,562.68	Pay as billed
06/07/2023	327221100728	07/01/2023	2213	\$63,773.37	\$63,773.37	Pay as billed
06/07/2023	327611106816	07/01/2023	2217	\$22,569.64	\$22,569.64	Pay as billed
06/07/2023	432411439666	07/01/2023	28201	\$11,134.81	\$11,134.81	Pay as billed
06/07/2023	432061430069	07/01/2023	28203	\$28,124.87	\$28,124.87	Pay as billed
06/07/2023	432471432040	07/01/2023	28207	\$10,232.41	\$10,232.41	Pay as billed
06/07/2023	308481344971	07/01/2023	1057822	\$25,405.68	\$25,405.68	Pay as billed
06/07/2023	238380783321	07/01/2023	1058208	\$21,240.16	\$21,240.16	Pay as billed



8 | Billing & Payment: Go to Billing Home

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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.

Home Small Group Quote & Renewals Manage Members **Billing & Payment** Reports Small Group Renewal Packages Commissions Resources

Billing & Payment

SAMPLE GROUP | [View Group Information](#)
GROUP NUMBER 1234567 [Change Group](#)

Amount Due reflects the sum of all invoices and adjustments that have a due date of (today) or a past date.

Amount Due: **\$202,862.97**

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

Invoices Payment History Payment Method Notifications Bill vs Paid Help System Alerts

Account Summary

Customer Name: PROSPECT CAPITAL MANAGEMENT LP Billing Customer Number: 1248476

Last Payment Rec'd: 06/01/2023 Next Payment Due Date: 07/18/2023 Current Balance: \$202,862.97
Last Payment Amount: \$63,773.37 Next Payment Amount: \$202,862.97

Open Invoice Listing Closed Invoice Listing

> Filter by No filter applied

Make Payment

Rows per page: 100 Row Count: 9

Pay	Invoice Date	Invoice Number	Due Date	Policies	Bill Group	Invoice Type	Payment(s) Pending	Adjustment(s) Pending	Amount	Outstanding Balance
☐	06/07/2023	327241100086	07/01/2023	210501	2211	List	Yes	No	\$17,819.35	\$17,819.35
☐	06/07/2023	3272001108772	07/01/2023	210501	2212	List	Yes	No	\$2,562.68	\$2,562.68
☐	06/07/2023	327221100728	07/01/2023	210501	2213	List	Yes	No	\$63,773.37	\$63,773.37
☐	06/07/2023	327611100816	07/01/2023	210501	2217	List	Yes	No	\$22,569.64	\$22,569.64
☐	06/07/2023	432411139666	07/01/2023	210501	28201	List	Yes	No	\$11,134.81	\$11,134.81
☐	06/07/2023	432061430069	07/01/2023	210501	28203	List	Yes	No	\$28,124.87	\$28,124.87
☐	06/07/2023	4324711432040	07/01/2023	210501	28207	List	Yes	No	\$10,232.41	\$10,232.41
☐	06/07/2023	308481344971	07/01/2023	210501	1057822	List	Yes	No	\$25,405.68	\$25,405.68
☐	06/07/2023	238380783321	07/01/2023	210501	1058208	List	Yes	No	\$21,240.16	\$21,240.16
Total									\$202,862.97	\$202,862.97

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

	Future	0-30	30-60	61-90	91-120	120+	Total past due balance
	\$0.00	\$202,862.97	\$0.00	\$0.00	\$0.00	\$0.00	\$202,862.97

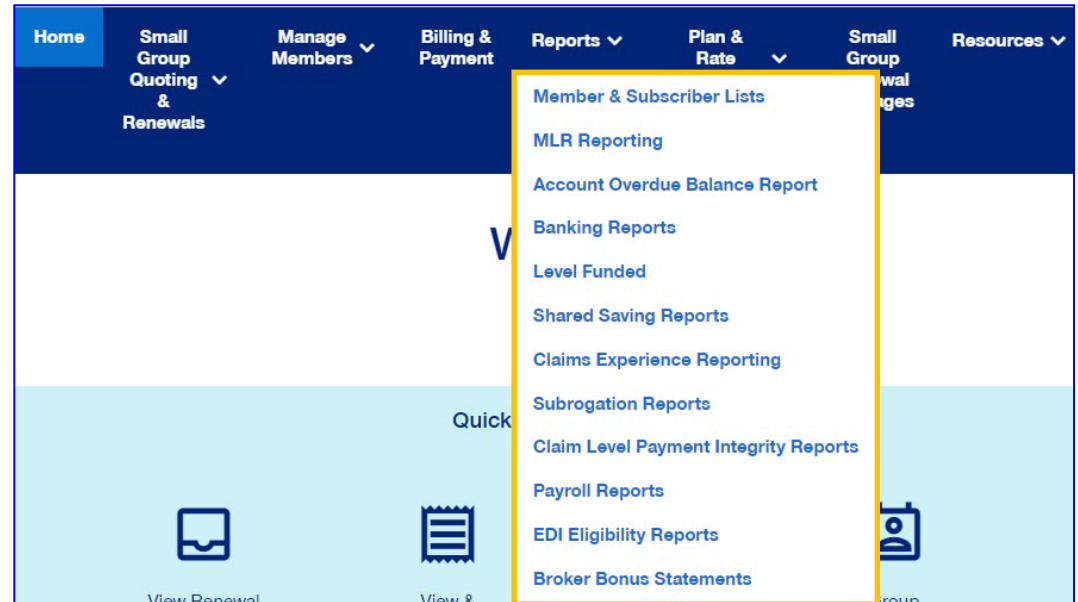


9 | Reports

Reports is used to generate specific reports. **Note:** **Member & Subscriber Lists** is the only report option available for **UnitedHealthcare HMO** users.

- **Member & Subscriber Lists** - All subscribers or members affiliated with the Group.
- **MLR Reporting** - Access the annual report on rebates as mandated by the Medical Loss Ratio provision of health care reform.
- **Account Overdue Balance Report** - Groups with late payments or terminations due to non-payment.
- **Banking Reports** - Daily, monthly and historical banking reports for the Group.
- **Level Funded** - Monthly Executive Summary, IRS Documents 6055 and IRS documents 1095 B.
- **Shared Savings Reports (ASO Groups Only)** - Summary and detailed information on claims for a specific group (month and year).
- **Claims Experience Reporting** - Monitors plan performance through utilization and incurred costs.
- **Subrogation Reports (ASO Groups Only)** - Monthly reports or reports for a specific date range.
- **Claim Level Payment Integrity Reports (ASO Groups Only)** - Reports for specific month and year.

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- **Payroll Reports** - Detailed data for specific check dates, a high-level overview of all payments.
- **EDI Eligibility Reports** - Detailed data for groups with ability to send data through EDI.
- **Broker Bonus Statements** - Bonus payments earned once a performance threshold is met.



9 | Member & Subscriber Lists

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To generate the Member or Subscriber List:

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

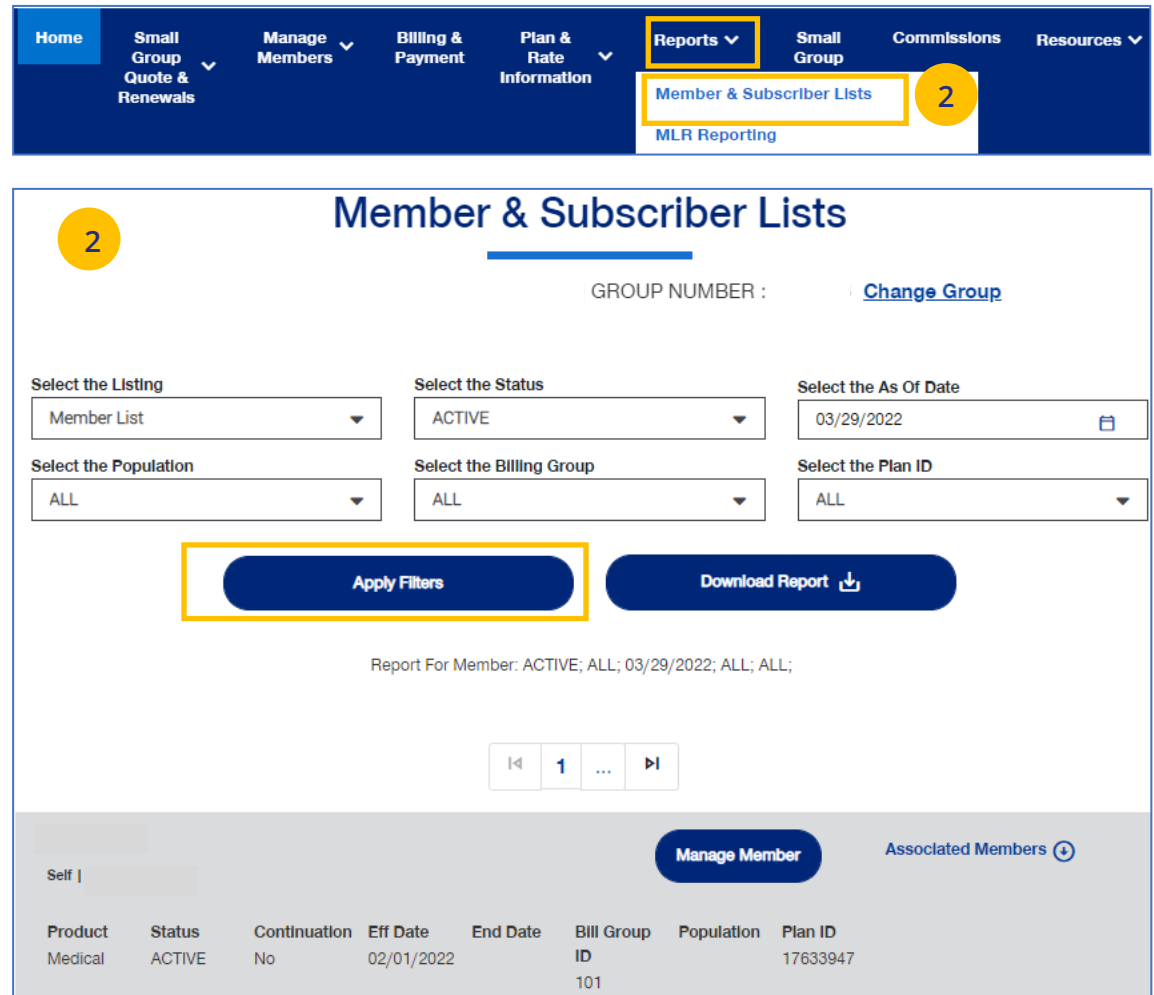
Note: **Member List** is the default and the default report will be shown when the screen displays. Just scroll down to view members in the report who met the default search criteria.

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

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

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

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



Home Small Group Quote & Renewals Manage Members Billing & Payment Plan & Rate Information Reports Member & Subscriber Lists MLR Reporting Small Group Commissions Resources

Member & Subscriber Lists

GROUP NUMBER : [Change Group](#)

Select the Listing: Member List Select the Status: ACTIVE Select the As Of Date: 03/29/2022

Select the Population: ALL Select the Billing Group: ALL Select the Plan ID: ALL

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

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

1

Self | [Manage Member](#) [Associated Members](#)

Product	Status	Continuation	Eff Date	End Date	Bill Group ID	Population	Plan ID
Medical	ACTIVE	No	02/01/2022		101		17633947



9 | Member & Subscriber Lists (continued)

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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
Member List

Select the Status
ACTIVE

Select the As Of Date
03/29/2022

Select the Population
ALL

Select the Billing Group
ALL

Select the Plan ID
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)

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- Click on the bell icon to open **Message Center**.
- Click on the plus sign.
- 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 navigation bar on the right includes a bell icon (labeled 4), a user profile for Laura Ignacio, Stage ENV, and a settings gear. The main heading is "Message Center". Below this, there is a "SORT BY:" dropdown menu set to "Date Descending" and a "Delete Selected" button. A pagination bar shows "1" of 1 items. The message list table has columns for "Date/Time", "From", and "Subject". A single message is listed with a checkbox (labeled 5) in the first column. The message details view shows the "To:" field as "lignacio2", "From:" as "SYSTEM", "Date:" as "2021-03-01 09:09:15.0", "Message Expiration Date:" as "2021-06-01 09:09:17.0", and "Subject:" as "Member Subscriber List". The "Attachments and Links:" section contains a link "MembersListReport.xlsx" (labeled 6). A close button (X) is in the top right corner of the message details view.

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

Message Details:

To: lignacio2
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.

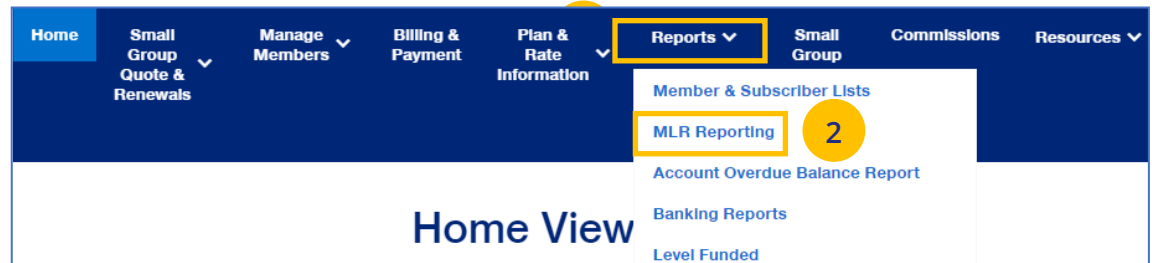
Note: This report is not available for **UnitedHealthcare HMO** users.

1. Click the **Reports** tab.
2. Select **MLR Reporting**. The **MLR Reporting** screen displays with the report.

Note: If the **Broker/Agency Search** screen displays, enter the Broker's **PCIS ID** and click the search icon. The search results display. Click **Select Broker**.

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.

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MLR Reporting

[Change Broker](#)

3

Export as PDF Export as Excel

1

3

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



9 | Account Overdue Balance Report

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

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

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

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The screenshot displays the UnitedHealthcare system's top navigation bar and a search interface. The navigation bar includes tabs for Home, Small Group Quote & Renewals, Manage Members, Billing & Payment, Plan Rate Information, Reports, Small Group, Commissions, and Resources. The 'Reports' tab is highlighted with a yellow circle labeled '1'. A dropdown menu for 'Reports' is open, showing options: Member & Subscriber Lists, MLR Reporting, Account Overdue Balance Report (highlighted with a yellow circle labeled '2'), Banking Reports, and Level Funded. Below the navigation bar, the 'Home View' section is visible. The main content area is titled 'Broker/Agency Search' and contains a message: 'You have been redirected to this page because the action you are performing requires you to select a broker / agency.' Below this message is a search bar labeled 'Search by' with a yellow circle labeled '3' next to it. The search bar has a clear button (X) and a search button (magnifying glass). Below the search bar, the text 'Search Result (1)' is displayed. At the bottom of the search result area, there is a table with one row containing a 'PCIS ID' and a 'Select Broker' button, which is also highlighted with a yellow circle labeled '3'.



9 | Account Overdue Balance Report (continued)

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To change your search criteria:

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

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

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

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

Account Overdue Balance Report

[Change Broker](#)

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

Select the Report Type
Late Groups

4

Report Date
2020-11-03

5

6

Apply

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

Download

Results (1)

<< 1 >>

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

Account Overdue Balance Report

[Change Broker](#)

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

No Termed Group reports available

Select the Report Type
Terminated Groups

Report Date



9 | Banking Reports

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

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

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

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

The screenshot shows the 'Banking Reports' interface. At the top, a navigation bar includes 'Home', 'Small Group Quote & Renewals', 'Manage Members', 'Billing & Payment', 'Plan Rate Information', 'Reports' (highlighted with a yellow box and callout 1), 'Small Group', 'Commissions', and 'Resources'. A dropdown menu from 'Reports' shows options: 'Member & Subscriber Lists', 'MLR Reporting', 'Account Overdue Balance Report', 'Banking Reports' (highlighted with a yellow box and callout 2), and 'Level Funded'. Below the navigation bar, the 'Home View' section displays 'Banking Reports' with a yellow box and callout 2. A 'GROUP NUMBER' field is present. A message states: 'To view a banking report, Select from the report listed below.' 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. The first row has 'Daily Report Name' as 'Charge Claim Activity', 'Last Updated' as '2020-12-14', and a 'File Link' icon (highlighted with a yellow box and callout 3). The second row has 'Daily Report Name' as 'Funding Advice', 'Last Updated' as '2020-12-08', and a 'File Link' icon. The 'Monthly Banking Reports' section shows 'No reports found'. The 'Historical Banking Reports' section is empty. At the bottom, there are two dropdown menus: 'Select the Report *' with 'Aged Outstanding' selected, and 'Select the Date Range' with '12/14/2020 - 12/14/2020' selected. An 'Apply' button is located to the right of these dropdowns.

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



9 | Banking Reports (continued)

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Selecting Other Reports

You can generate and view different reports using the dropdown.

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

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

Below is a list of available reports and descriptions.

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



9 | Level Funded

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

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

Note: This report is for Level Funded groups only.

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

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

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

The screenshot shows the 'Level Funded Reports' interface. At the top, a navigation bar includes 'Home', 'Small Group Quote & Renewals', 'Manage Members', 'Billing & Payment', 'Plan Rate Information', 'Reports' (highlighted with a yellow box and callout 1), 'Small Group', 'Commissions', and 'Resources'. Below the navigation bar, the 'Home View' section shows 'Level Funded Reports' with a 'GROUP NUMBER : 1373' and a 'View Group Information' link. A list of reports is displayed: 'Monthly Executive Summary' (with a plus sign), 'IRS Documents 6055' (with a plus sign), 'IRS Documents 1095B' (with a plus sign), and 'Reconciliation Reports' (with a plus sign). The 'Reconciliation Reports' section is expanded, showing a table with columns: 'Type Of Report', 'Plan Year Start Date', 'Last Updated', and 'File Link'. The table contains three rows: 'FINAL', 'EARLY TERM', and 'ANNUAL'. Each row has a 'File Link' icon (highlighted with a yellow box and callout 3). Callout 2 points to the 'Level Funded' option in the 'Reports' dropdown menu.

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



9 | Shared Saving Reports

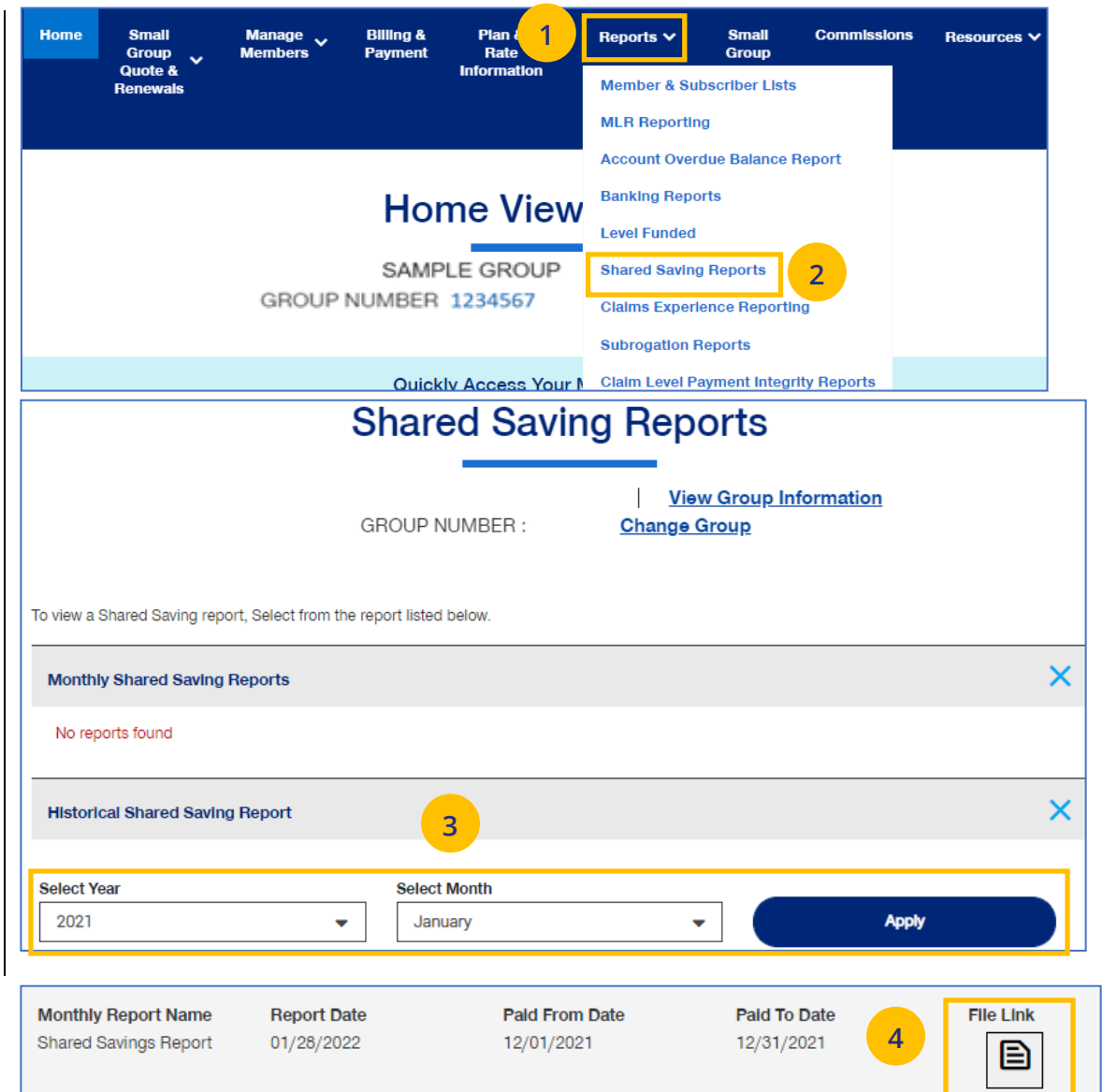
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The **Shared Saving Reports** are in Excel and show claims (summary and detail) for a specific month and year. Historical reports are also available.

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

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

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



Home View
SAMPLE GROUP
GROUP NUMBER 1234567

Shared Saving Reports

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

To view a Shared Saving report, Select from the report listed below.

Monthly Shared Saving Reports ×

No reports found

Historical Shared Saving Report ×

Select Year: 2021 Select Month: January **Apply**

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



9 | Claims Experience Reporting

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

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

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

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9 | Subrogation Reports

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

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

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

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

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

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The screenshot shows the 'Home View' of a system with a top navigation bar. A yellow box labeled '1' highlights the 'Reports' dropdown menu. Another yellow box labeled '2' highlights the 'Subrogation Reports' option within that menu. Below the navigation bar, the 'Subrogation Reports' section is displayed. It includes a 'GROUP NUMBER : 1234567' and links for 'View Group Information' and 'Change Group'. A message states: 'To view a subrogation report, Select from the report listed below.' Below this is a table with two sections: 'Monthly Subrogation Reports' and 'Historical Subrogation Reports'. The 'Monthly Subrogation Reports' table has columns: 'Monthly Report Name', 'Last Updated', 'PHI', and 'File Link'. It contains two rows of data. A yellow box labeled '2' highlights the 'File Link' column for the first row. At the bottom, there is a form with two dropdown menus: 'Select the Report *' (set to 'Subrogation Report') and 'Select the Date Range *' (set to '01/13/2023 - 01/13/2023'). A blue 'Apply' button is to the right of these fields.

Home View

SAMPLE GROUP
GROUP NUMBER 1234567

Subrogation Reports

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

To view a subrogation report, Select from the report listed below.

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

Historical Subrogation Reports	
--------------------------------	--

Select the Report *
Subrogation Report

Select the Date Range *
01/13/2023 - 01/13/2023

Apply



9 | Claim Level Payment Integrity Reports

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

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

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

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

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The screenshot shows the UnitedHealthcare portal interface. The top navigation bar includes tabs: Home, Small Group Quote & Renewals, Manage Members, Billing & Payment, Plan & Rate Information, Reports (highlighted with a yellow box and a yellow circle with the number 1), Small Group, Commissions, and Resources. The Reports dropdown menu is open, showing options: Member & Subscriber Lists, MLR Reporting, Account Overdue Balance Report, Banking Reports, Level Funded, Shared Saving Reports, Claims Experience Reporting, Subrogation Reports, and Claim Level Payment Integrity Reports (highlighted with a yellow box and a yellow circle with the number 2). The main content area shows 'Home View' for 'SAMPLE GROUP' with 'GROUP NUMBER 1234567'. Below this, there's a section titled 'Claim Level Payment Integrity Reports' with a 'GROUP NUMBER : ' field and links for 'View Group Information' and 'Change Group'. A message states: 'To view a payment integrity report, Select from the report listed below.' Below this, there are two dropdown menus: 'Select the Year' (set to 2021, highlighted with a yellow box and a yellow circle with the number 3) and 'Select the Month' (set to August, highlighted with a yellow box and a yellow circle with the number 4). A 'Download Report' button with a download icon is also present.



9 | Payroll Reports

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The **Payroll Reports** show detailed data for specific check dates, providing a high-level overview of all payments.

A summary includes: earnings, employee taxes and deductions, and employer taxes and deductions.

1. Click the **Reports** tab.
2. Select **Payroll Reports**. The **Payroll Reports** window displays with the **Latest Payroll Results** and **Historical Payroll Reports** sections.
3. Click the specific **File Link** to view the report you need.

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

- Member & Subscriber Lists
- MLR Reporting
- Account Overdue Balance Report
- Banking Reports
- Level Funded
- Shared Saving Reports
- Claims Experience Reporting
- Subrogation Reports
- Claim Level Payment Integrity Reports
- 2 Payroll Reports**
- EDI Eligibility Reports

Home View
SAMPLE GROUP
GROUP NUMBER 1234567
Quickly Access Your

To view a Payroll Report, select from the reports listed below:

Latest Payroll Reports

Schedule Name	Check Date	Generated Date	File Link
HCL BI-WEEKLY1 - 26 - SALARIED NON EXEMPT	03/24/2023	03/26/2023	
HCL SEMI-MONTHLY2 - 24 - SALARIED	03/24/2023	03/26/2023	
HCL SEMI-MONTHLY1 - 24 - HOURLY	02/28/2023	03/01/2023	

Employer Name:	Surestmarch09	Employer G#	78700089	Schedule:	HCL Semi-Mon	Frequency:	SEMI_MONTHLY			
All Payroll Deductions:										
Report Generated On:	03/01/2023									
Pay Period Check Date:	02/28/2023									
Employee Number	Last Name	First Name	Date Of Birth	Last Four SSN	Benefit Name	Per Pay Period Deduction	First Paycheck Deduction	Total Premiums	Total Deductions	Deductions Remaining
Duck1	Donald1		11/15/1981	8330	Coverage	75.00	01/31/2023	1,650.00	22	19
Duck2	Donald2		12/02/1969	8331	Coverage	50.00	11/25/2022	450.00	9	1
Duck3	Donald3		01/29/1962	8332	Coverage	125.00	09/09/2022	3,250.00	26	13
Duck4	Donald4		09/19/1983	8333	Coverage	50.00	01/31/2023	450.00	9	6



9 | EDI Eligibility Reports

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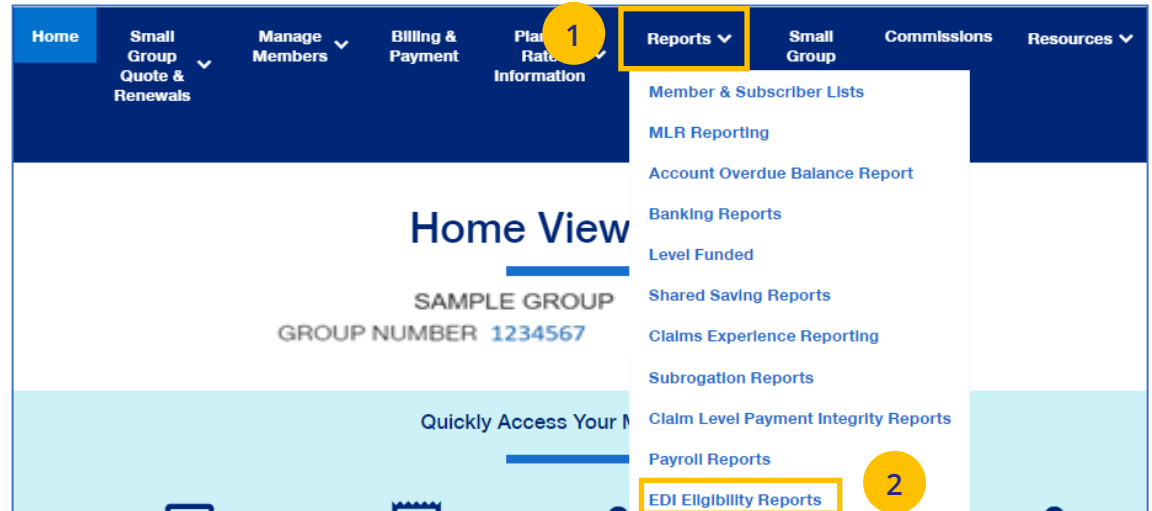
EDI Eligibility Reports are for groups that submit eligibility data electronically to UnitedHealthcare. The report shows the results of the data load.

1. Click the **Reports** tab.
2. Select **EDI Eligibility Reports**. The **EDI Eligibility Reports** window displays with reports that fall within the default time period. Each report will show a **File ID**, **File Name**, **Group Name** and **Report Status**.

An **In Progress** message shows in the **Report Status** field if the report has not finished loading. **Report Complete** status indicates the report is ready to be viewed. **File Error** status indicates the entire file has failed submission. Examples for a failed submission include a wrong format or the service was down.

Note: File Name – The file name will not have the same name as the file you loaded. The File Name is assigned internally by the system.

Note: Searching by Date or Keyword – You can search for reports by **Time Period** (Start Date and End Date) or by **Keyword**. **Time Period** searches must be within a 14-day window and are limited to the previous six months. **Keyword** searches will show results as you enter the word.



EDI Eligibility Reports

SUREST SAMPLE GROUP | [View Group Information](#)

GROUP NUMBER 1234567 (SUREST: 780000000) [Change Group](#)

Reports may take additional time to load. Loading will continue if you navigate to another page and return. Thank you for your patience as we work to improve your experience.

Select Time Period

Start Date *

06/27/2023

End Date *

07/10/2023

Search

Enter Keyword

e.g. File Name, Group Name

Clear Filter

File ID	File Name	Group Name	Report Status
7819	SURESTMIG.TESTBINDMIG.2 02306211612.cpf	FedEx Corporation	✓ Report Complete Report
8476	ALPHADSSSEnrimnt20230630 121712071*0000		✓ Report Complete Report
8481	ALPHADSSSEnrimnt20230630 122619559*0000		✓ Report Complete Report
8484	ALPHADSSSEnrimnt20230630 123231980*0000		⋯ In Progress
8486	ALPHADSSSEnrimnt20230630 123349711*0000		⋯ In Progress
8505	ALPHADSSSEnrimnt20230630 125821460*0000		✓ Report Complete Report



9 | EDI Eligibility Reports (continued)

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- Click the link for the report you need. The **Report Overview** screen displays with three sections.

Below is a description of the sections of the report:

File Completed – Group details, including when the file was received, processed and the status.

- Note: Download Report** – Click the Download Report link to download the report in Excel.

Errors & Warnings – File statistics, including how many transactions on the file errored or processed with warnings. A maximum of three items can be displayed in the **Top Errors & Warnings** section.

Detailed Updates and Errors – Click on each tab to view the specific record notes.

File ID	File Name	Group Name	Report Status
7819	SURESTMIG.TESTBINDMIG.2 02306211612.cpf		✓ Report Complete Report
8476	ALPHADSSEnrImnt20230630 121712071+0000	FedEx Corporation	✓ Report Complete Report
8481	ALPHADSSEnrImnt20230630 122619559+0000	FedEx Corporation	✓ Report Complete Report

Report Overview

SUREST SAMPLE GROUP | [View Group Information](#)
GROUP NUMBER 1234567 (SUREST: 780000000) [Change Group](#)

File Completed ✕

[Download Report](#)

Customer Subscriber	HCLSurest	File Received Date	
Policy Number	3234453	Processing Date	07/07/2023 07:01 AM
File Identifier	53533	Processing Status	Complete

Errors & Warnings

Errors
0

Warnings
0

Top Errors & Warnings
This report contains no errors or warnings.

Detailed Updates and Errors

☑ Added (23) ☒ Errors (0) ⚠ Warnings (0) ⌚ Updated (0) ⌚ Terminated (0) **☑ All (23)**

Member Name ▾	DOB ▾	Member Type ▾	Transaction ▾
Soraya Hinoje	1968-01-01	Subscriber	Added
James Gretz	1972-01-01	Subscriber	Added



10 | Plan & Rate Information

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

- Rates
- Employer Handbook (Group Policy/Administrative Services Agreement)
- Member Handbook (Certificate of Coverage/Summary Plan Description)
- Summary Benefit Coverage (SBC)
- View Benefits

Note: Plan documents that are displayed and available for access will be based on the products the group purchases.

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: To access medical, dental or vision rates (if available) from this screen, click the link or links.

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



10 | Plan & Rate Information

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To View Medical, Vision and Dental Rates:

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

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

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

Plan Rates

Show Rates for Effective Date:

All Dates

☐ All Dates

☐ 05/01/2021

☐ 01/01/2022

[Download PDF](#) [Print All Rates](#)

[Medical Plans](#) [Dental Plans](#) [Vision Plans](#)

Rates Effective 01/01/2022

Plan: 12527295		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** and **Oxford Fully Insured** groups, you will be able to view the detailed benefits of the plan as well as the programs they offer.

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

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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

Feb 19, 2024 United HealthCare Services, Inc. All Rights Reserved

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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.

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Home Small Group Quote & Renewals Manage Members Billing & Payment **Plan & Rate Information** Reports Small Group Renewal Packages Commissions Resources

Plan Information Plan Rates

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](#)

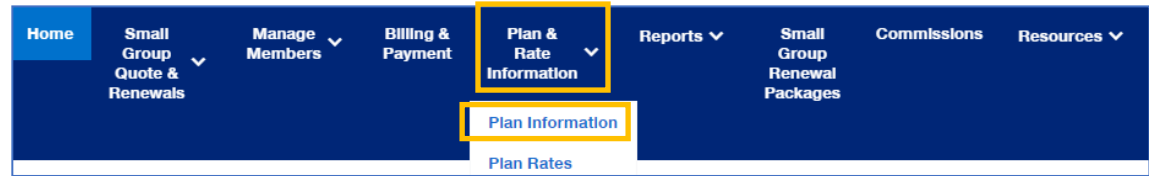


10 | Member Handbook

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.

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Plan Information

GROUP NUMBER [Change Group](#)

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

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

FILTER BY

Description

Medical

[View Medical Rates >](#)

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

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

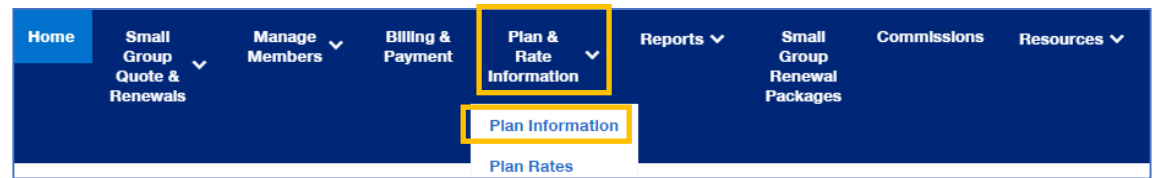
[Employer Handbook](#) [Member Handbook](#)
[Summary Benefit Coverage](#) [View Benefits](#)



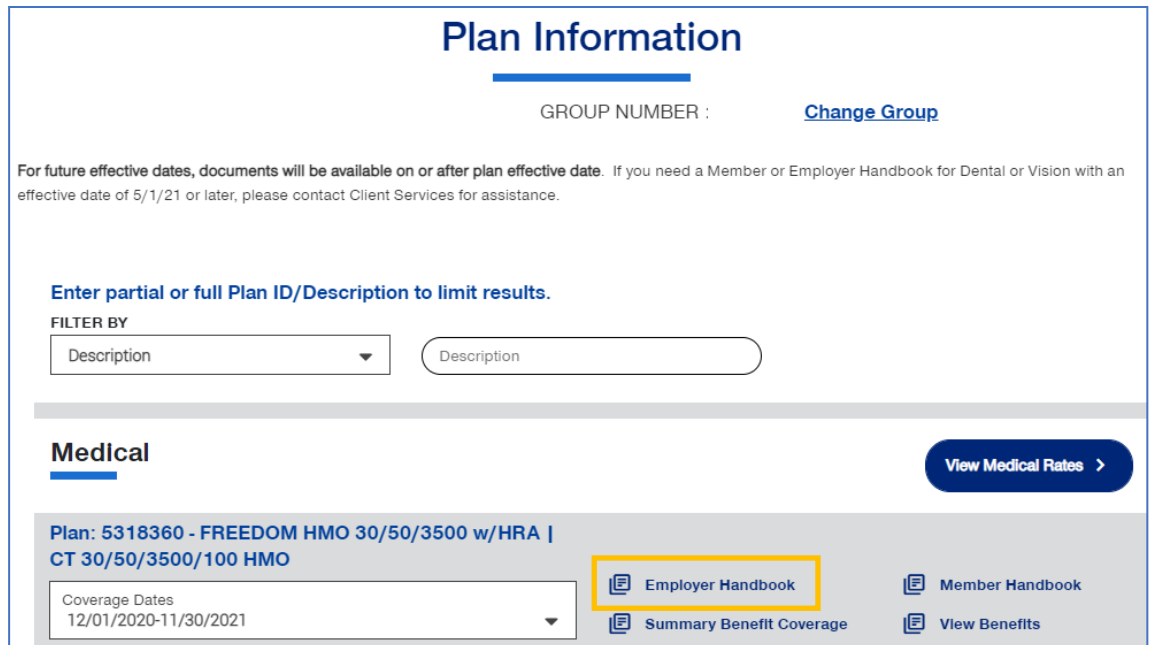
10 | Employer Handbook

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.

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The screenshot shows a dark blue navigation bar with several menu items: Home, Small Group Quote & Renewals, Manage Members, Billing & Payment, Plan & Rate Information, Reports, Small Group Renewal Packages, Commissions, and Resources. The 'Plan & Rate Information' menu is highlighted with a yellow box, and its sub-menu 'Plan Information' is also highlighted with a yellow box. Below it, 'Plan Rates' is visible.



The screenshot shows the 'Plan Information' page. At the top, there's a title 'Plan Information' and a 'GROUP NUMBER' field with a 'Change Group' link. Below this is a disclaimer: '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.' There's a section 'Enter partial or full Plan ID/Description to limit results.' with a 'FILTER BY' dropdown set to 'Description' and a search input field. Below this is a 'Medical' section with a 'View Medical Rates' button. At the bottom, there's a plan selection area showing 'Plan: 5318360 - FREEDOM HMO 30/50/3500 w/HRA | CT 30/50/3500/100 HMO' and a 'Coverage Dates' dropdown set to '12/01/2020-11/30/2021'. To the right of the plan selection, there are four links: 'Employer Handbook' (highlighted with a yellow box), 'Member Handbook', 'Summary Benefit Coverage', and 'View Benefits'.

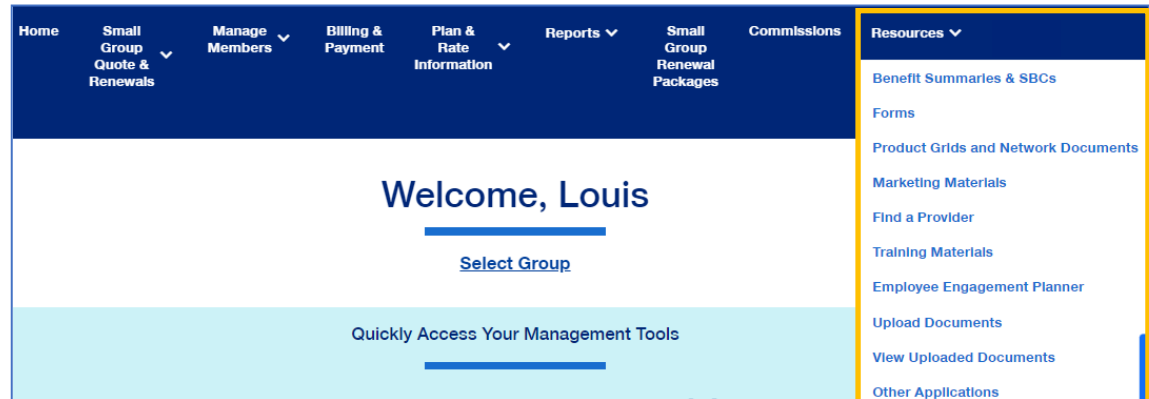


11 | Resources

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

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

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11 | Benefit Summaries & SBCs

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

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

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

The screenshot displays the 'Benefit Summaries & SBCs' page in the United eServices application. The top navigation bar includes links for Home, Small Group Quote & Renewals, Manage Members, Billing & Payment, Plan & Rate Information, Reports, Small Group Renewal Packages, Commissions, and Resources. The 'Resources' dropdown menu is open, showing 'Benefit Summaries & SBCs' as the selected option. Below the navigation bar, a welcome message 'Welcome, Louis' is displayed with a 'Select Group' link. A section titled 'Benefit Summaries & SBCs' features four tabs: 'Medical & Pharmacy', 'Dental', 'Vision', and 'STD, LTD, Life'. Below the tabs, there are filters for 'Funding Type', 'State', and 'Medical Plan Code', each with a dropdown menu. A 'Search' button is located at the bottom of the filter section. To the right of the filters, a search results area is shown with a magnifying glass icon and a prompt: 'We're ready to find what you're looking for! Enter your search criteria in the sidebar to the left, and we'll display the relevant results here for you to browse, download, or print.'



11 | Benefit Summaries & SBCs (continued)

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

Medical & Pharmacy [36]

To find a Benefit Summary or SBC (Summary of Benefits and Coverage) for your plan, click on the link below. Middle Market Medical and RX plan combination

Filter Documents

Funding Type*
Fully Insured

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

State*
Alabama

Plan Year*
2021

Medical Plan Code
AU8M

Search

3

Filter Documents

Funding Type*
Level Funded

Product Type*
UnitedHealthcare Level Funded

State*
Alabama

Effective Date*
08/01/2022

Coverage Type*
Family

Your Search Returned 11624 Documents

Enter keyword to filter Results
ex: Plan Code , Plan Description (3 character)

4

AdvE1000 - RX2

Benefit Summary

SBC

AdvE100021 - RX4 ADV

Benefit Summary

SBC

AdvE100021B - RX4 ADVB

Benefit Summary

SBC

AdvE1000CN - RX2

Benefit Summary

SBC



11 | Forms

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

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

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

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

The screenshot shows the 'Forms' page interface. At the top is a dark blue navigation bar with links: Home, Small Group Quote & Renewals, Manage Members, Billing & Payment, Plan & Rate Information, Reports, Small Group Renewal Packages, Commissions, and Resources. A sub-menu under 'Resources' includes 'Benefit Summaries & SBCs' and 'Forms' (highlighted with a yellow box and a yellow circle with the number 1). Below the navigation bar is the 'Forms' section header, also with a yellow circle and the number 1. A descriptive text line reads: 'Get the latest forms for employers and employees, including applications, Prescription Drug Lists (PDLs), HSA forms, claims forms and more.' Below this is a box titled 'Looking for Plans and Networks documents or Marketing Materials?' containing two links: 'Plans and Networks documents' and 'Marketing Materials for employers' (both highlighted with yellow boxes and a yellow circle with the number 2). Below the links is a filter section with three dropdown menus: 'State' (set to 'Select state'), 'Group Size' (set to '2-50'), and 'Language' (set to 'English'). A red error message below the filters says 'Select a state above to get started.' Below the filter section is a list of form entries. The first entry is titled 'Installments, Applications, and Enrollments' with a long alphanumeric ID, followed by 'Alabama | 10+' and 'Full Packet'. To its right is a 'View PDF' button (highlighted with a yellow box and a yellow circle with the number 2). The second entry is 'CAL | Alabama | 2-50' followed by 'Full Packet', also with a 'View PDF' button to its right.

11 | Product Grids and Networks Documents

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

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

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

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

The screenshot shows the 'Product Grids and Network Documents' page. At the top is a dark blue navigation bar with links: Home, Small Group Quote & Renewals, Manage Members, Billing & Payment, Plan & Rate Information, Reports, Small Group Renewal Packages, Commissions, and Resources. The 'Resources' dropdown is open, showing 'Benefit Summaries & SBCs', 'Forms', 'Product Grids and Network Documents' (highlighted with a yellow box and callout 1), 'Marketing Materials', 'Find a Provider', 'Training Materials', 'Employee Engagement Planner', 'Upload Documents', 'View Uploaded Documents', and 'Other Applications'. Below the navigation bar is a 'Welcome, Louis' section with a 'Select Group' link and a 'Quickly Access Your Management Tools' section. The main content area is titled 'Product Grids and Network Documents' (callout 1) and includes a sub-header 'Get access to plan grids, network brochures and other documents for medical and specialty plans across fully insured and level funding plans.' Below this is a yellow box with the text 'If you are looking for Benefit Summaries or SBC's click here.' (callout 1). Underneath are three dropdown menus: 'Plan Year' (2023, callout 2), 'State' (Select state, callout 2), and 'Group Size' (2-50). A red message says 'Select a state above to get started.' Below these are the same three dropdowns with values 2022, Alabama, and 2-50. At the bottom, the 'Plans' section shows 'RENPKG | Alabama | 2-50 | 2022' and a 'View PDF' button (callout 2).



11 | Marketing Materials

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

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

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

Home Small Group Quote & Renewals Manage Members Billing & Payment Plan & Rate Information Reports Small Group Renewal Packages Commissions Resources

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

Welcome, Louis

Select Group

Quickly Access Your Management Tools

Marketing Materials

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

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

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

Visit the [Employee Engagement Planner](#)

State Language

Select state English

Select a state above to get started.

Member Experience

If you're looking for documents to share with members, visit [Employee Engagement Planner](#)

DOCNM0001 Alabama	View
DOCNM0001 Select markets	View
Experience Material	View PDF
TestMixedCase Alabama	View PDF



11 | Find a Provider

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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.

Home Small Group Quote & Renewals Manage Members Billing & Payment Plan & Rate Information Reports Small Group Renewal Packages Commissions Resources

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

Welcome, Louis
[Select Group](#)

Quickly Access Your Management Tools

Provider Search

United Healthcare Oxford
Oxford & Oxford Level Funded

United Healthcare
UnitedHealthcare Level Funded

United Healthcare
UnitedHealthcare HMO

United Healthcare
United Healthcare Freedom Plans

United Healthcare
UnitedHealthcare Fully Insured

United Healthcare
United Behavioral Health

United Healthcare
Prescription Drug Lists

What Oxford plan are you looking for?

You can find your plan name on the front of your member ID card in the bottom right corner.

Metro

Freedom



11 | Find a Provider (continued)

[TABLE OF CONTENTS](#)

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

Street Address, City & State, Zip Code

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**

Office Visit - Primary Doctor - Established Patient - Low Complexity

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

5

[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)

[TABLE OF CONTENTS](#)

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.



In what state are you looking for a provider?

Alabama

Alaska

Select a plan in Alabama.

Charter

Choice



11 | Find a Provider (continued)

[TABLE OF CONTENTS](#)

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

Street Address, City & State, Zip Code

CONTINUE

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

Birmingham, AL
[CHANGE LOCATION](#)

6

Search by provider, service, or condition

[SEARCH](#)

CHOICE PLUS

[CHANGE PLAN](#)



Results for **All Primary Care Providers**

Office Visit - Primary Doctor - Established Patient - Low Complexity

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

6

[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)

[TABLE OF CONTENTS](#)

Find A Provider: UnitedHealthcare HMO

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

The screenshot shows the UnitedHealthcare website's provider search process. At the top, a navigation bar includes 'Resources' and 'Commissions'. A dropdown menu under 'Resources' lists 'Benefit Summaries & SBCs', 'Forms', 'Product Grids and Network Documents', 'Marketing Materials', and 'Find a Provider' (highlighted with a yellow box and a yellow circle with the number 1). Below this is the 'Provider Search' section. It features three UnitedHealthcare logos with their respective plans: 'Oxford & Oxford Level Funded', 'UnitedHealthcare Level Funded', and 'UnitedHealthcare HMO' (highlighted with a yellow box and a yellow circle with the number 2). Below the logos, a text prompt says 'To search for doctors, clinics or facilities, choose the state where you live' with a yellow circle with the number 3. Underneath are four state map icons: California, Oklahoma, Oregon, and Washington. Below the maps, a text prompt says 'Select a network in California' with a yellow circle with the number 4. Underneath are two network options: 'SignatureValue Advantage HMO' and 'SignatureValue Alliance HMO'.

[TABLE OF CONTENTS](#)

12 | Find a Provider (continued)



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

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

5

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

Los Angeles, CA
[CHANGE LOCATION](#)

[SEARCH](#)

CHOICE PLUS

CHANGE PLAN >

[<](#) Results for **All Primary Care Providers** [NEW SEARCH](#)

Office Visit - Primary Doctor - Established Patient - Low Complexity [VIEW MAP](#)

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

✓ 1357 In-Network Providers Found Near 35203 [Reset Results](#)

SORT RESULTS BY:

PREFERRED PROVIDERS

[FILTER](#)

Refine Results

Changing a search results filter will reload the page immediately.

LOCATION

WHERE

Birmingham, AL

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

6

6



11 | Find a Provider (continued)

[TABLE OF CONTENTS](#)

Find A Provider: UnitedHealthcare Freedom Plans

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

Resources **Commissions** **App**

- Benefit Summaries & SBCs
- Forms
- Product Grids and Network Documents
- Marketing Materials
- Find a Provider**

Provider Search

United Healthcare Oxford
Oxford & Oxford Level Funded

United Healthcare
UnitedHealthcare Level Funded

United Healthcare
UnitedHealthcare HMO

United Healthcare
United Healthcare Freedom Plans

United Healthcare
UnitedHealthcare Fully Insured

United Healthcare
United Behavioral Health

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

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

4

In which state do you live?

Arizona

Maryland

Massachusetts

5

Select a network in Arizona

AZ Compass HMO 

AZ Compass HMO

6



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

7

Continue

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

Los Angeles, CA
CHANGE LOCATION

8

Search by provider, service, or condition

Q SEARCH

<

Search Results

8

Search by provider, service, or condition

Q 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.

H

Federally Qualified Health Center (FQHC)

Specialty

11 | Find a Provider (continued)

[TABLE OF CONTENTS](#)

Find A Provider: UnitedHealthcare Fully Insured

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

The screenshot shows the UnitedHealthcare website's 'Provider Search' section. On the left, a navigation menu lists 'Resources' and 'Commiss'. Under 'Resources', there are links for 'Benefit Summaries & SBCs', 'Forms', 'Product Grids and Network', 'Marketing Materials', and 'Find a Provider'. The 'Find a Provider' link is highlighted with a yellow box and a yellow circle with the number 1. The main content area is titled 'Provider Search' and displays a grid of UnitedHealthcare plan logos. The logos include 'United Healthcare Oxford', 'United Healthcare Level Funded', 'United Healthcare HMO', 'United Healthcare Freedom Plans', 'United Healthcare Fully Insured', and 'United Behavioral Health'. The 'United Healthcare Fully Insured' logo is highlighted with a yellow circle and the number 2. Below the grid, a section titled 'Are you a current UHC member or are you shopping for a health plan?' contains two options: 'UHC Member' (with a medical cross icon) and 'Shopping Around' (with a shopping cart icon). The 'Shopping Around' option is highlighted with a yellow circle and the number 3. Below this, a section titled 'What plan are you looking for?' includes the text 'You will find your plan name on the bottom-right corner of your member ID card.' and a list of plan types: 'Individual and Family State Exchanges', 'All Savers Health Plans', and 'Charter / Charter Balanced'. The 'All Savers Health Plans' option is highlighted with a yellow circle and the number 4.

Provider Search

Resources ^ Commiss

Benefit Summaries & SBCs

Forms

Product Grids and Network

Marketing Materials

Find a Provider 1

United Healthcare Oxford

Oxford & Oxford Level Funded

United Healthcare Level Funded

United Healthcare HMO

United Healthcare Freedom Plans

United Healthcare Fully Insured 2

United Behavioral Health

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

UHC Member 3

You have UnitedHealthcare

Shopping Around

View your UHC plan options

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

5

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

<

Search Results

6

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)

[TABLE OF CONTENTS](#)

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, a navigation bar includes 'Resources' and 'Commissions'. A dropdown menu under 'Resources' is open, showing options like 'Benefit Summaries & SBCs', 'Forms', 'Product Grids and Network Documents', 'Marketing Materials', and 'Find a Provider' (highlighted with a yellow box and a yellow circle with the number 1). Below this, a grid of United Healthcare logos is shown, with 'United Behavioral Health' (highlighted with a yellow circle with the number 2) being the selected option. The main section is titled 'Find a Provider' and includes the text 'Find therapists, psychiatrists, or other clinics in your network.' Below this is a search bar with a magnifying glass icon, a text input field containing 'Enter provider name, keyword or leave blank', a location pin icon with 'Eden Prairie, MN 55344', and a blue 'Search' button (highlighted with a yellow circle with the number 3). Below the search bar, a message states 'You can filter by provider types and service descriptions on the next page.' The results section shows '200 RESULTS WITHIN 25mi' and 'Rows per Page: 25 1 - 25 of 200'. On the left, a 'Refine Results' sidebar includes a 'Clear All Filters (0)' link, a note 'ALL RESULTS ARE IN-NETWORK:', 'Sort By' (Distance), 'Within' (25 Miles), 'Search Filters' (Search Filters), 'Coverage/Plan Type' (Medicare, Medicaid, Commercial), and checkboxes for 'Schedule Online' and 'virtual visit (Online Therapy)'. The main results area lists two providers: 'Leah Willett BCBA' and 'Melanie Vankuiken BCBA', both with 'BOARD CERT BEHAVIORAL ANALYST' status. Each provider entry includes a 'Leave a review' link, a 'Accepting New Patients' status, contact information (phone number, address, and distance), and links for 'Email information' and 'Website information'.



11 | Find a Provider (continued)

[TABLE OF CONTENTS](#)

Find A Provider: Prescription Drug Lists

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

The screenshot displays the UnitedHealthcare website interface. On the left, a navigation menu under 'Resources' includes links for 'Benefit Summaries & SBCs', 'Forms', 'Product Grids and Network Documents', 'Marketing Materials', and 'Find a Provider'. The 'Find a Provider' link is highlighted with a yellow box and a yellow circle containing the number 1. To the right, the 'Provider Search' section shows various UnitedHealthcare plans: 'Oxford & Oxford Level Funded', 'UnitedHealthcare Level Funded', 'UnitedHealthcare HMO', 'United Healthcare Freedom Plans', 'UnitedHealthcare Fully Insured', 'United Behavioral Health', and 'Prescription Drug Lists'. The 'Prescription Drug Lists' link is highlighted with a yellow circle containing the number 2. Below this, the 'Prescription Drug Lists' section is highlighted with a yellow circle containing the number 3. This section includes a sidebar with 'Pharmacy benefits' links: 'Prescription Drug Lists', 'Pharmacy programs', 'Oxford pharmacy network', and 'Pharmacy FAQ'. The main content area of the 'Prescription Drug Lists' section features the heading 'Check your PDL to stay updated on your pharmacy coverage', a brief explanation of a PDL, a sign-in prompt 'Sign in to view the PDL for your plan' with a 'Select your plan to sign in' dropdown, and sections for 'Health Insurance Marketplace and Small and Large Group plans', 'Individual and SHOP Marketplace Drug Lists (On-Exchange)', and 'Small Group and Large Group Drug Lists (Off-Exchange)'.



11 | Training Materials

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

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

The screenshot shows the 'Training Materials' page. At the top, a dark blue navigation bar contains links: Home, Small Group Quote & Renewals, Manage Members, Billing & Payment, Plan & Rate Information, Reports, Small Group Renewal Packages, Commissions, and Resources. The 'Resources' dropdown menu is open, showing options like Benefit Summaries & SBCs, Forms, Product Grids and Network Documents, Marketing Materials, Find a Provider, **Training Materials** (highlighted with a yellow circle and labeled '1'), Employee Engagement Planner, and Upload Documents. Below the navigation bar, a white banner says 'Welcome, Louis' with a 'Select Group' link. A light blue bar below that says 'Quickly Access Your Management Tools'. The main section is titled 'Training Materials' with a yellow circle and '1' next to it. Below this is a search bar with the text 'Find resources to assist you in utilizing uhceservices, SAMx and SAMx - Level Funded, including guides, presentations, and videos.' A yellow box highlights the filter section, labeled with a yellow circle and '2'. It contains four dropdown menus: 'Select a Brand' (Please Select), 'Select a State' (Please Select), 'Select a Product Type' (Please Select), and 'Select a Group Size' (Please Select). Below these is a red text prompt: 'Select filters above to get started.' A second, smaller version of the filter section is shown below, with 'UnitedHealthcare' selected for Brand, 'Alabama' for State, 'Medical' for Product Type, and '2-50' for Group Size. This section is also labeled with a yellow circle and '2'. Below the filters, the page is titled 'Training Internal' and lists two items: 'SAMx' and 'uhceservices.com', each with a dropdown arrow.



11 | Employee Engagement Planner

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

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

- 1. Click the **Employee Engagement Planner** tab. The **Employee Engagement Planner** screen displays.
- 2. Click **View Calendar** or **View All Topics**.

Home

Small Group Quote & Renewals

Manage Members

Billing & Payment

Plan & Rate Information

Reports

Small Group Renewal Packages

Commissions

Resources

Benefit Summaries & SBCs

Forms

Product Grids and Network Documents

Marketing Materials

Find a Provider

Training Materials

Employee Engagement Planner

Upload Documents

View Uploaded Documents

Other Applications

Home View for Louis

Select Group

Quickly Access Your Management Tools

Employee Engagement Planner

GROUP NUMBER : [Change Group](#)

View Calendar

View content calendars to make it easier to keep your employees informed throughout the plan year.

View All Topics

Find ready-to-send employee emails, fliers and brochures organized by topic.

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.

Calendar

3

MILESTONES BEHAVIORAL SERVICES INC. | GROUP NUMBER : 1048476

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

<

>

today

June 2021

month

week

day

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 FDX				
27	28	29	30	1	2	3
			UHC Cost of Care			



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

Before the Plan Begins

Filter Options

Category Type

☐ Brochure

☐ Email

☐ Flier

☐ Select All

Product Brand

☐ UnitedHealthcare

☐ Oxford

☐ UnitedHealthcare Level Funded

States

☐ Connecticut

☐ New York

☐ New Jersey

☐ Select All

Apply

Reset

UHC New Member Checklist

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

Choose a Communication Type:

Flier

Email



UHC Waiting For Coverage to Start

Actions your employees can take before their health plans begin.

Choose a Communication Type:

Flier

Email



Oxford New Member Checklist

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

Choose a Communication Type:

Flier

Email





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11 | Upload Documents

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

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

- 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 requesting the document.

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

TABLE OF CONTENTS

Home Small Group Quote & Renewals Manage Members Billing & Payment Plan & Rate Information Reports Small Group Renewal Packages Commissions Resources

Benefit Summaries & SBCs
Forms
Product Grids and Network Documents
Marketing Materials
Find a Provider
Training Materials
Employee Engagement Planner
Upload Documents
View Uploaded Documents
Other Applications

Home View for Louis

Select Group

Quickly Access Your Management Tools

1

Upload Documents

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 One

Select Document for Upload * No file chosen...

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.



11 | Upload Documents (continued)

[TABLE OF CONTENTS](#)

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 yellow circle labeled '2' points to the 'Document Name *' dropdown menu. The menu is open, showing a list of document types: 'Select One', 'Annual Certification', 'Binder Check Payments and Paper Group Submission', 'Common Law Employee Attestation', 'Common Ownership Certification Form', 'Employer Information Form' (highlighted in blue), 'Healthy NY Recertification', 'Miscellaneous', and 'Professional Employer Association Certification Form'.
- Step 3:** A yellow circle labeled '3' points to the 'Select Document for Upload *' box. This box contains a green square icon and the text 'Decision 2.jpg'. An 'Add Row +' button is visible to the right.
- Step 4:** A yellow circle labeled '4' points to the 'Upload' button. The 'Document Name *' dropdown now shows '1099 Attestation Form'. 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 present.



11 | View Uploaded Documents

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

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

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

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

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

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

The screenshot shows the 'View Uploaded Documents' page. At the top is a navigation bar with links: Home, Small Group Quote & Renewals, Manage Members, Billing & Payment, Plan & Rate Information, Reports, Small Group Renewal Packages, Commissions, and Resources. The Resources dropdown is open, showing links like Benefit Summaries & SBCs, Forms, Product Grids and Network Documents, Marketing Materials, Find a Provider, Training Materials, Employee Engagement Planner, Upload Documents, and View Uploaded Documents (highlighted with a yellow box and a '1' in a yellow circle). Below the navigation bar is a 'Home View for Louis' section with a 'Select Group' link. A light blue bar contains 'Quickly Access Your Management Tools' and a yellow box with 'View Uploaded Documents' and a '1' in a yellow circle. The main section is titled 'View Uploaded Documents' with a '1' in a yellow circle. It contains three search fields: 'Select the Document Name' (dropdown with 'All'), 'Select the Date Range' (calendar icon, showing '04/21/2022 - 04/22/2022'), and 'Enter the Group ID' (text input). A yellow box with 'Apply' and a '2' in a yellow circle is below these fields. Below the search fields is a table with two rows. The first row has columns: Group ID, Ingestion Date (2022-04-21), Federal Tax ID, Uploaded By, and Document Name (MISCELLANEOUS). A yellow box with 'Download' and a download icon, with a '3' in a yellow circle, is to the right of the first row. The second row has columns: Group ID, Ingestion Date (2022-04-21), Federal Tax ID, Uploaded By, and Document Name (WAGE AND TAX FORM). A yellow box with 'Download' and a download icon is to the right of the second row. Below the table is a 'Download Report' button with a download icon. At the bottom is a green message box: 'Your request to download the report is successful. You will be notified in the Message Center when your report is complete.'

Group ID	Ingestion Date	Federal Tax ID	Uploaded By	Document Name
	2022-04-21			MISCELLANEOUS
	2022-04-21			WAGE AND TAX FORM



11 | Other Applications

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

- 1. Click the **Other Applications** link. The **Other Applications** screen displays.

Home

Small Group Quote & Renewals

Manage Members

Billing & Payment

Plan & Rate Information

Reports

Small Group Renewal Packages

Commissions

Resources

Benefit Summaries & SBCs

Forms

Product Grids and Network Documents

Marketing Materials

Find a Provider

Training Materials

Employee Engagement Planner

Upload Documents

View Uploaded Documents

Other Applications

Home View for Louis

Select Group

Quickly Access Your Management Tools

Other Applications

1

<< 1 >>

United eServices (UeS)

United Healthcare

Market

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

Carrier

UnitedHealthcare

Funding Type

Fully Insured

Product

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

Functionality

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

Go to United eServices

Employer eServices



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.

Note: For Internal Sales roles, you will have to enter the Broker's PCIS ID to access the **Commissions** screen.

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

Note: 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."

Commissions

SAMPLE BROKER | [Change Broker](#)

If you do not see your Legacy AllSavers statement look on [UHone](#).

Filter By

Business Segment*

Show All

From Date*

01/18/2023

To Date*

07/17/2023

[Apply Filter\(s\) >](#)

Commission Statements

Now showing 6 statements from 01/18/2023 to 07/17/2023 [Clear Filters](#)

When should I see my latest statement? [View Statement Schedules >](#)

Business Segment	Statement Date		
UHC	05/16/2023	PDF	Excel
UHC	05/16/2023	PDF	Excel
UHC	04/04/2023	PDF	Excel
UHC	02/14/2023	PDF	Excel
UHC	01/31/2023	PDF	Excel

Appendix: Broker Roles and Permissions

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Broker Roles and Permissions												
Function	Broker Lead with User Maintenance	Standard Broker with Commissions	Standard Broker without Commissions	Standard Broker No Commissions or Notices	Broker View Only	Baseline Broker with Quote, Renewal, Commissions	Baseline Broker with Quote and Commissions	Baseline Broker with Quote	Baseline Broker with Renewal and Commissions	Baseline Broker with Renewal	Baseline Broker with Commissions	Baseline Broker with Quote and Renewal
Invite Broker users	Y	N	N	N	N	N	N	N	N	N	N	N
Invite a Broker user as a Lead or assign an existing Broker as Lead	Y	N	N	N	N	N	N	N	N	N	N	N
View, update, disable a Broker user's profile	Y	N	N	N	N	N	N	N	N	N	N	N
Invite Employer users	N	N	N	N	N	N	N	N	N	N	N	N
View Subscriber and Member lists	Y	Y	Y	Y	Y	N	N	N	N	N	N	N
View plan documents and benefits for an Employer group	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y
View existing members within an Employer group	Y	Y	Y	Y	Y	N	N	N	N	N	N	N
Enroll, update, term new members within an Employer	Y	Y	Y	Y	N	N	N	N	N	N	N	N
Print or order a member's ID Card	Y	Y	Y	Y	Y	N	N	N	N	N	N	N
Quote new business (UeS, Project X, All Savers, Quick Quote)	Y	Y	Y	Y	Y	Y	Y	Y	N	N	N	Y
Renewals and Renewal Packages	Y	Y	Y	Y	Y	Y	N	N	Y	Y	N	Y
Renew existing business, view renewal packages for Employer groups with upcoming renewals	Y	Y	Y	Y	Y	Y	N	N	Y	Y	N	Y
View Commissions page	Y	Y	N	N	N	Y	Y	N	Y	N	Y	N
View MLR reports	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y
Access to the Billing and Payment page and ability to view bills	Y	Y	Y	Y	Y	N	N	N	N	N	N	N
View Member and Employee Handbooks	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	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	N	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	N	N	N	N	N	N	N	N
View EDI Eligibility Report	Y	Y	Y	Y	N	N	N	N	N	N	N	N



Appendix: Employer Roles and Permissions

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Employer Roles and Permissions												
Function	Employer Lead	Employer User	Employer User with CER	Employer View Only	Employer View Only with CER	Employer View Only with Member Handbook	Employer User Without Member Handbook	Employer With Eligibility and Reporting	Employer With Eligibility	Employer With Billing	Employer With Reporting	Employer Member Management Only
Invite employer users	Y	N	N	N	N	N	N	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	N	N	N	N	N
Create, view, update and disable an employer user's profile	Y	N	N	N	N	N	N	N	N	N	N	N
View Member and Subscriber lists	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y
View plan documents and benefits for an employer group	Y	Y	Y	Y	Y	Y	Y	Y	Y	N	Y	N
View members within an Employer group	Y	Y	Y	Y	Y	Y	Y	Y	Y	N	Y	Y
Enroll, update, term members within an Employer group	Y	Y	Y	N	N	N	N	N	N	N	N	Y
Print or order a Member's ID Card	Y	Y	Y	N	N	Y	N	N	N	N	N	Y
Access to the Billing and Payment page and ability to view bills	Y	Y	Y	Y	Y	N	Y	N	N	Y	N	N
View Member Handbook	Y	Y	Y	Y	Y	Y	N	N	N	N	N	N
View Employer Handbook	Y	Y	Y	Y	Y	N	Y	N	N	N	N	N
Upload a document via the Upload Document screen	Y	Y	Y	N	N	N	N	N	N	N	N	N
View Banking Report	Y	Y	Y	Y	Y	N	N	Y	N	Y	Y	N
View Level Funded Report	Y	Y	Y	N	N	N	N	Y	N	N	Y	N
View Payment Integrity Report	Y	Y	Y	N	N	N	N	Y	N	Y	Y	N
View Claims Experience Report	Y	Y	Y	N	Y	N	N	Y	N	Y	Y	N
View EDI Eligibility Report	Y	Y	N	N	N	N	N	N	Y	N	N	Y

Note: Several roles should not be selected unless instructed by UnitedHealthcare: Employer DST UHC Use Only, Employer Member Management Partner Use and Employer Member Mang Renewal.

