Uhceservices.com Reference Guide for Employers

United Healthcare

About this Document

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

It provides information on how to navigate uhceservices.com, where you find specific information and how to perform tasks related to your group and your covered employees and their dependents, including:

- Enrolling and updating member information, including terminating a member's coverage and requesting or printing member health plan identification (ID) cards
- Billing and payment information
- Member and subscriber lists
- Access to Member and Employee Handbooks, and Summaries of Benefits and Coverage (SBC)
- Viewing benefits for a specific plan
- Resources to find helpful information

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Using this Document

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1 | Access and Sign In

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

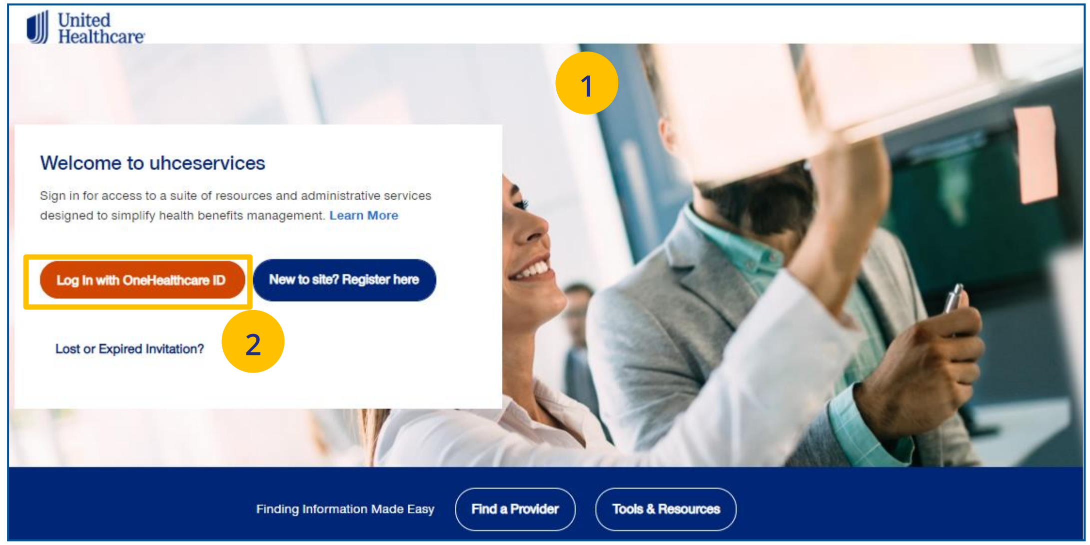
NOTE: Registration invites are active for 60 days. If your invite expires, contact the technical support line.

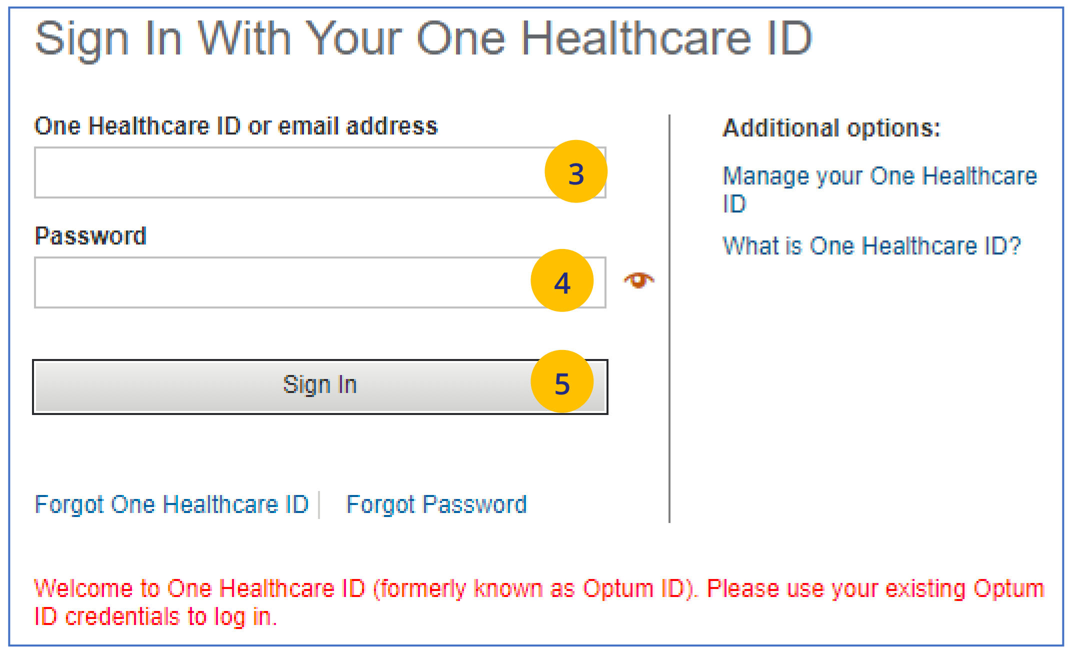
1. Go to uhceservices.com. The Log In page displays.
2. Click the **Log In With OneHealthcare ID** button.
3. Enter your One Healthcare ID in the **One Healthcare ID or email address** field.
4. Enter your Password in the **Password** field.
5. Click **Sign In**. The **Home** page displays.

What information will you see?

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

NOTE: If user is inactive for 13 months, the account will be deactivated. If this happens, contact the technical support line.





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2 | Home

The **Home** page displays the following:

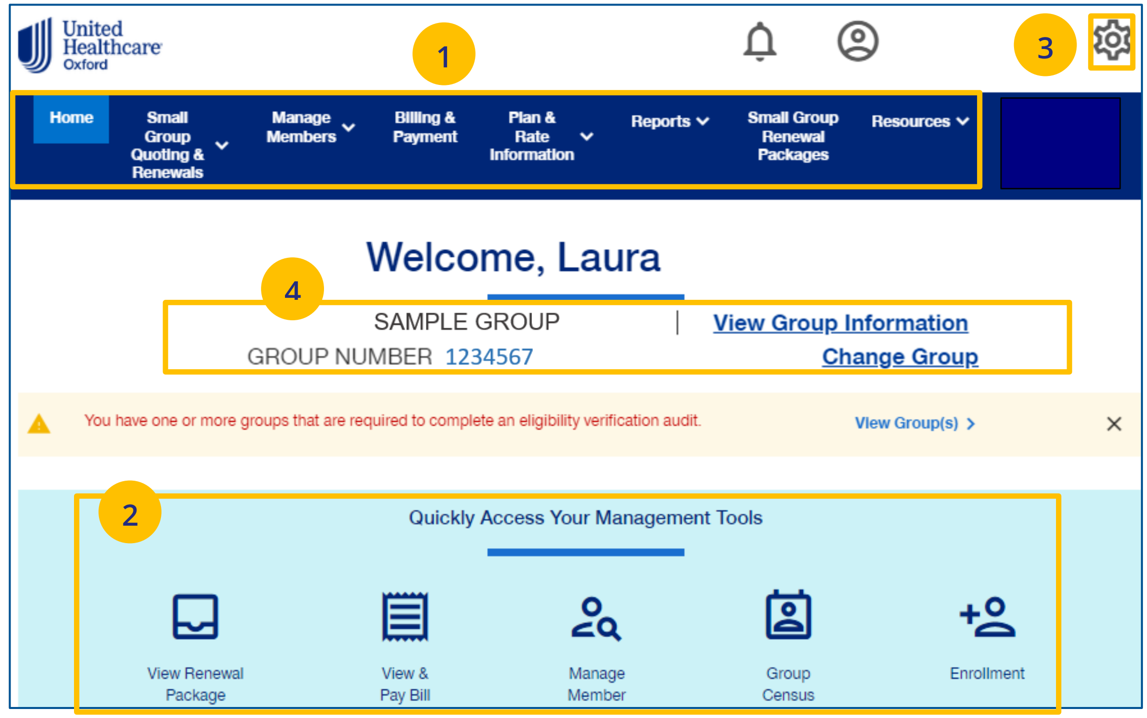
1. Menu items across the top of the page
2. Quick Access links or "shortcuts" provide easy access to the most common tasks performed.
3. Gear icon that allows you to do the following:
    - invite others to use uhceservices.com
    - view your personal information
    - change your password
    - view messages or generated reports
    - logout
4. Employer group name/number are 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. (See step-by step procedures on the next page.)

    Note: Group Eligibility Verification Audit – A message displays on the Home page if your group is required to complete an eligibility verification audit. Click **Begin process** to begin the audit process. 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.



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2 | Group Selection: PEO Groups

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

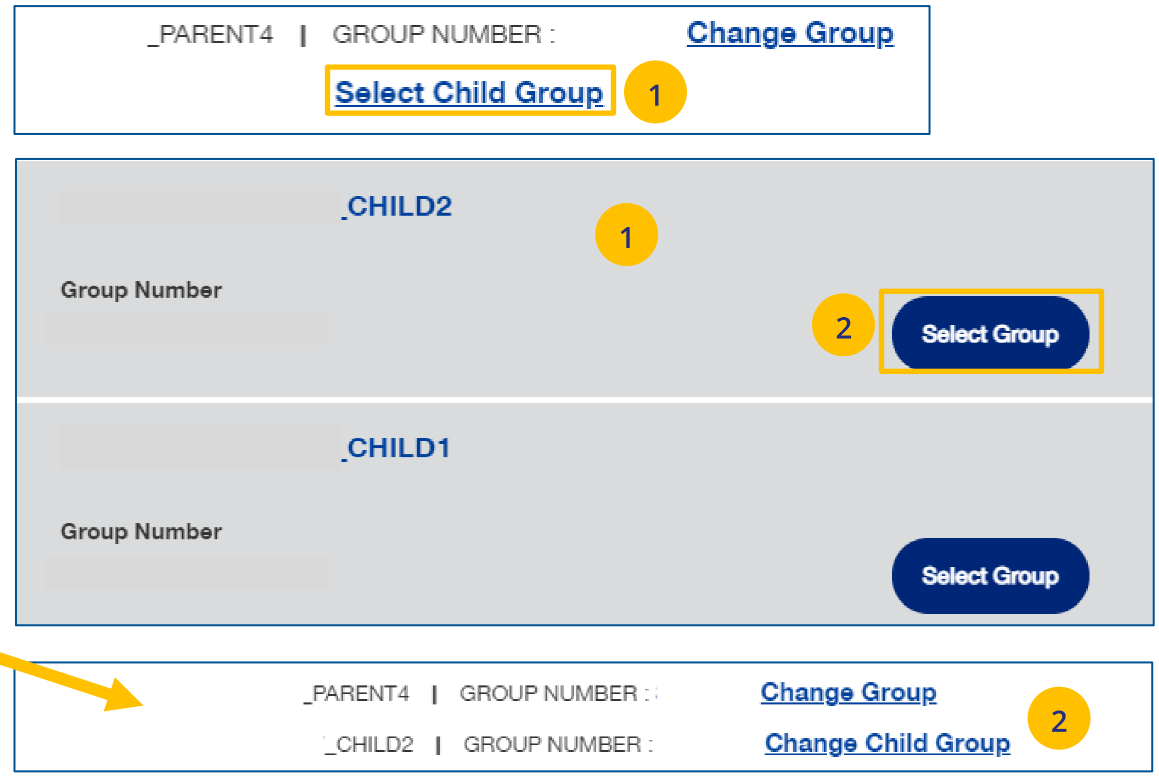
Note: PEO Groups do not apply to **UnitedHealthcare HMO**.

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

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

2. Find the **Child Group** you need and click **Select Group.** The Parent Group and **Child Group** information will both show as your defaults 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**.



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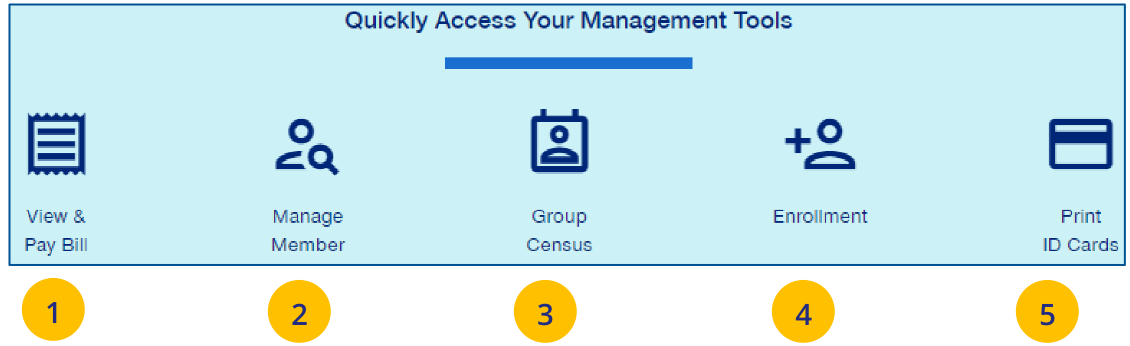
3 | Quickly Access Your Management Tools

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

These shortcuts most often include:

1. **View & Pay Bill** – Displays Billing & Payment screen.
2. **Manage Member** – Search for a member by Member ID or Name.
3. **Group Census** – Access Member & Subscriber Lists.
4. **Enrollment** – Enroll a new member or dependent
5. **Print ID Cards** – Request a Health Plan ID card for a subscriber or dependent.



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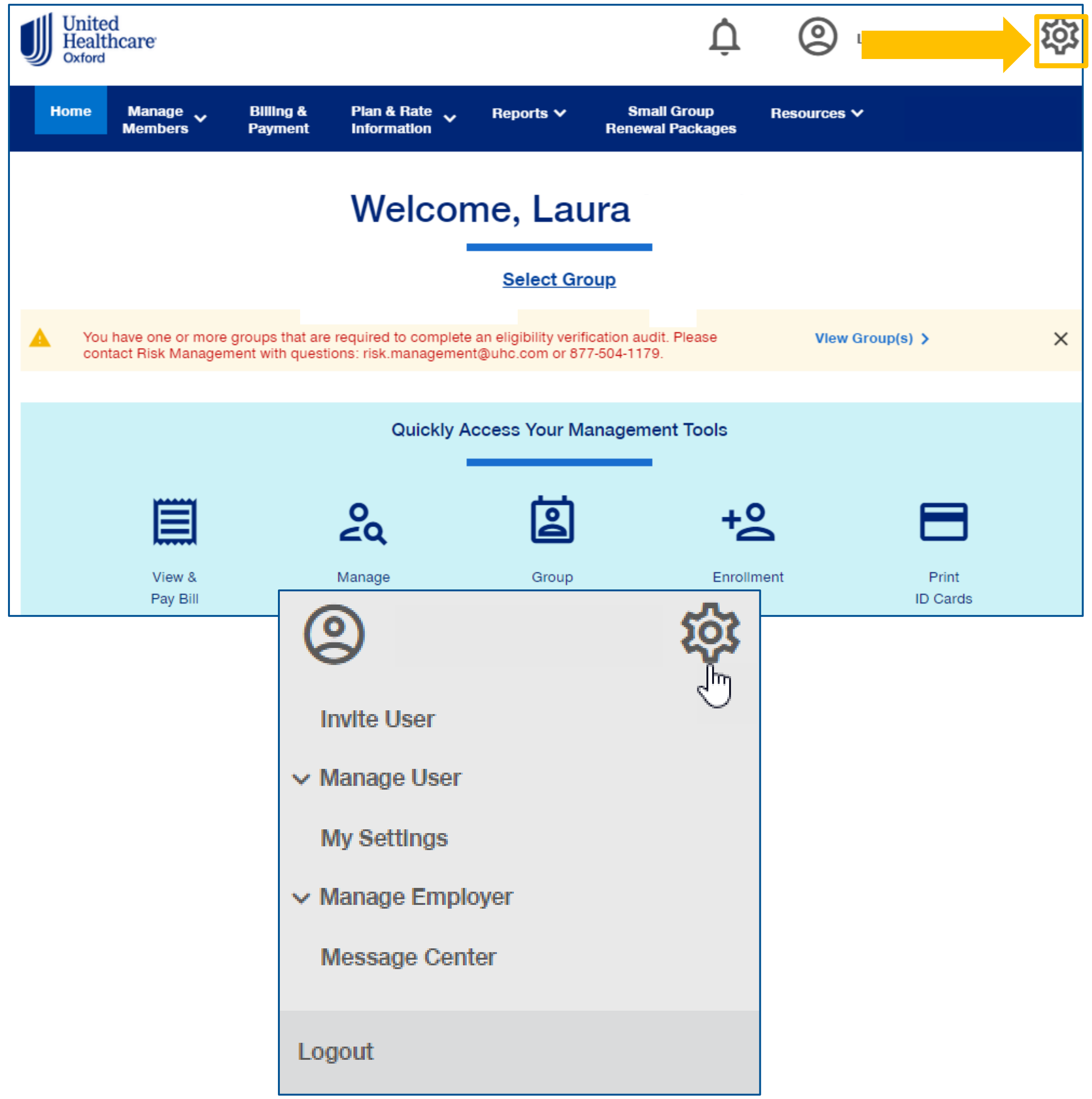
4 | Gear Icon

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

1. **Invite User** – Invite an Employer user to use uhceservices.com.
2. **Manage User** – Search for a user in your group 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 Employer** – Search for and display Employer Group information.
5. **Message Center** – Contains Important messages and is used to retrieve reports that have been generated.
6. **Logout** – Logout of the application.



4 | Invite User

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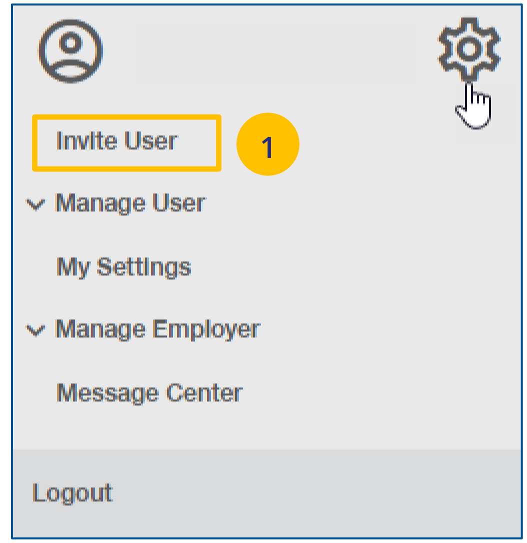
Employers can give support staff access to uhceservices.com so they can perform functions. To invite a someone to use uhceservices.com:

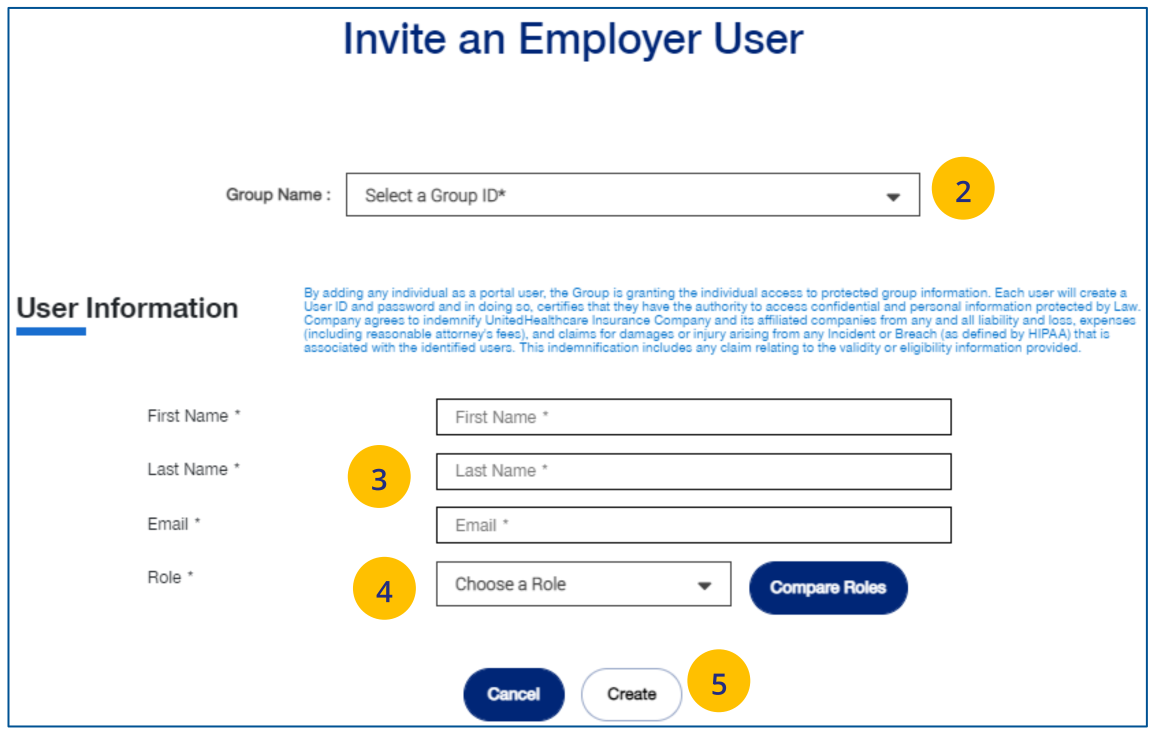
1. Click the **gear icon** and select **Invite User**. The **Invite an Employer User** screen displays.
2. Use the dropdown in the **Group Name** field to select the Group.
3. Enter **First Name**, **Last Name, Email** address.
4. Select the specific role in the dropdown:
   - **Employer Lead** – Can perform all functions, including inviting other users and disabling users
   - **Employer User** – Can perform specific employer functions
   - **Employer View Only** – Can view information only
5. Click **Create**. A message at the top of the screen indicates your invitation has been successful.

Note: for **UnitedHealthcare HMO** users, the only fields available are **First Name**, **Last Name**, **Email** and **Role**.

Employer Roles

See a list of **Employer Roles and Permission** descriptions on the next page.





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.												

CER = Claims Experience Report

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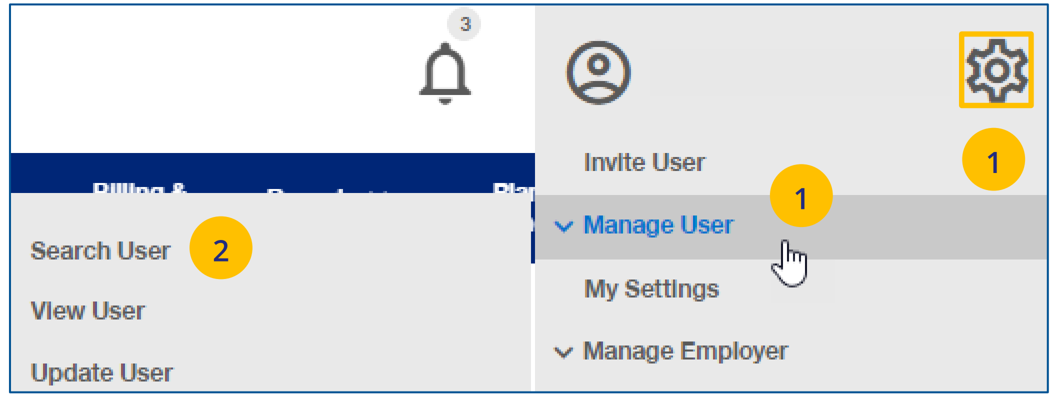
4 | Manage User

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

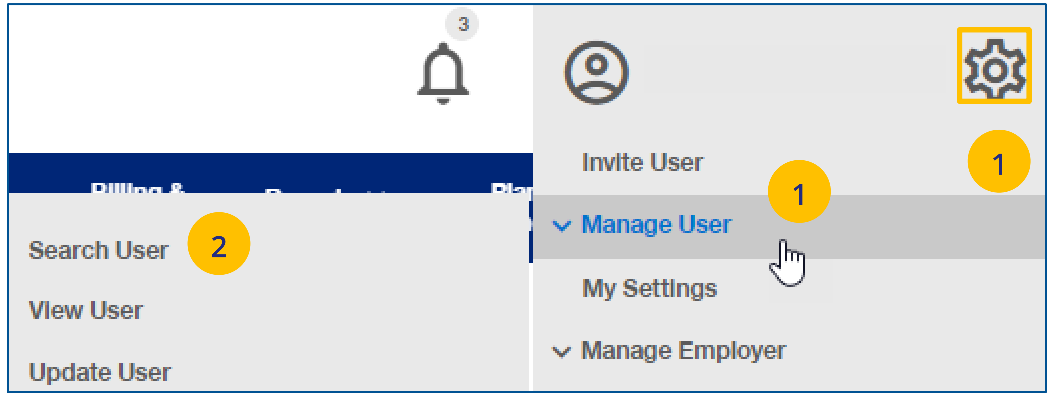
1. Click the **gear icon** and select **Manage User**. You will have three options:
   - **Search User** – You can search for a user or invite a new user (if you have that capability)
   - **View User** – You can search for a user or invite a new user (if you have that capability)
   - **Update User** – You can search for a user or invite a new user (if you have that capability)
2. Select one of the options to display the **Employer User Search** screen.
3. Select the Group from the **Group Name** dropdown.
4. You have two options:
   - Click **Search**. Search results will display with the list of users. When you select a user, the **User Maintenance** screen displays. This is used to edit any user information or to disable the user.
   - Click **Invite New User**. The **Invite a Broker User s**creen displays. Complete the information and click **Create**.

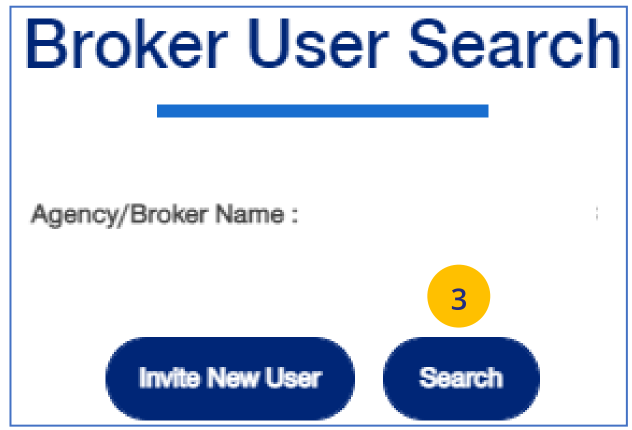


4 | Re-Invite a User

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.





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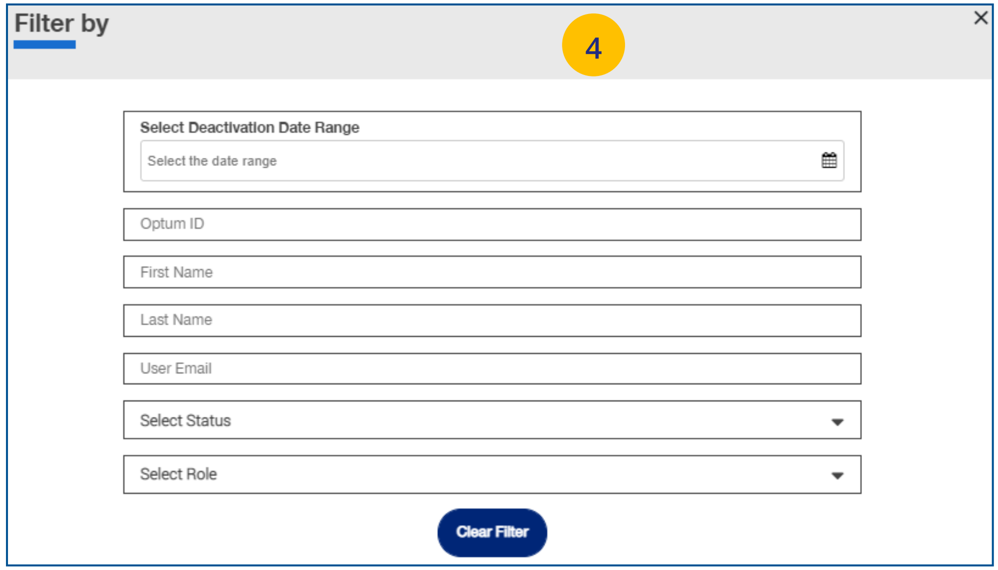
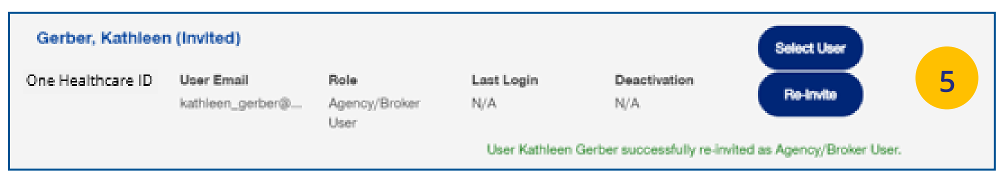
4 | Re-Invite a User (continued)

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.





4 | My Settings

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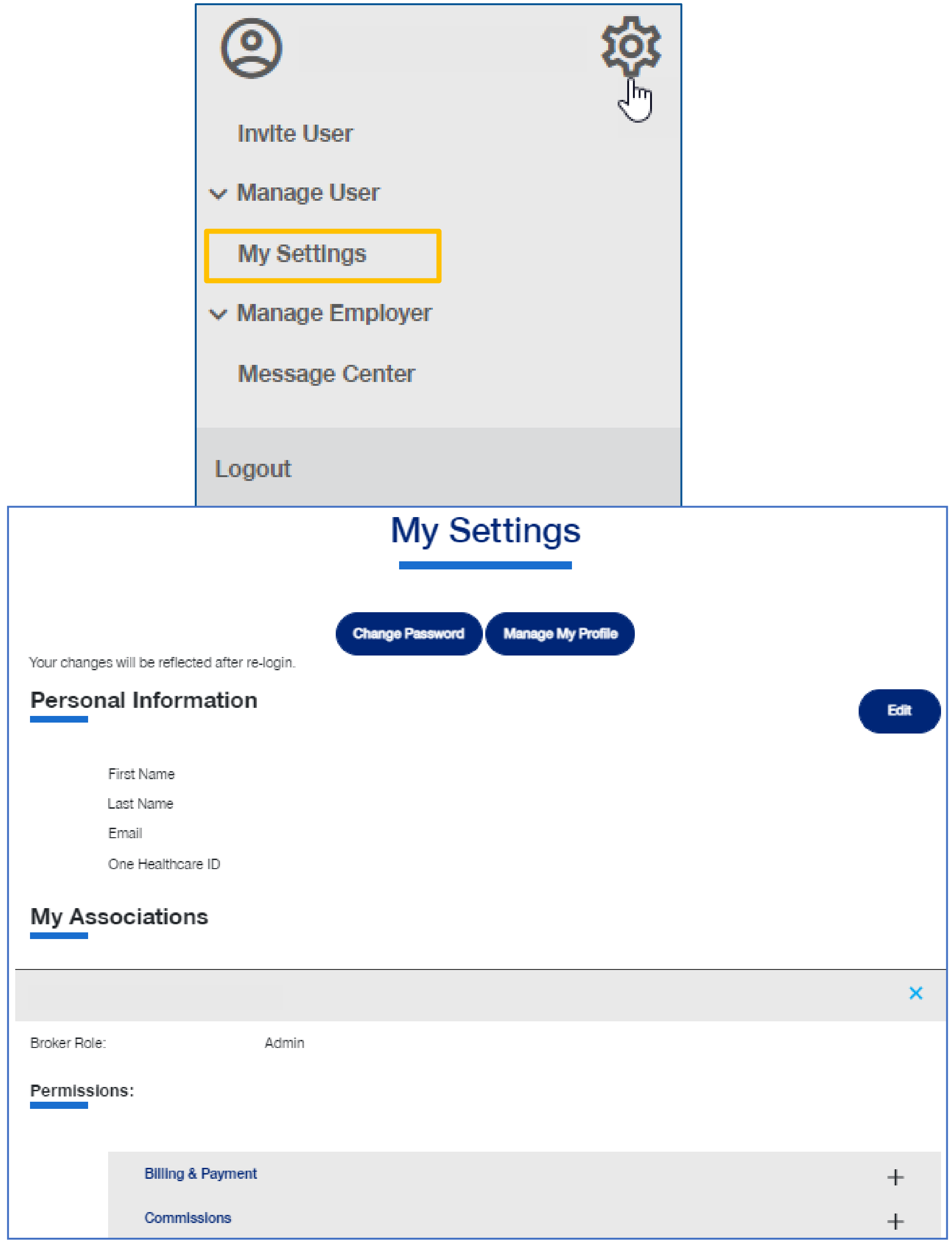
The **My Settings** page can be used to do the following:

- **Change Password**
- **Manage My Profile** – Manage your One Healthcare ID. **See more information on the next page.**
- **Personal Information** – View details or edit personal information.
- **My Associations** – Broker associations and specific permissions.
- **Platforms/Tools**
- **Addresses** – Shows mailing addresses and telephone numbers.



4 | Manage My Profile

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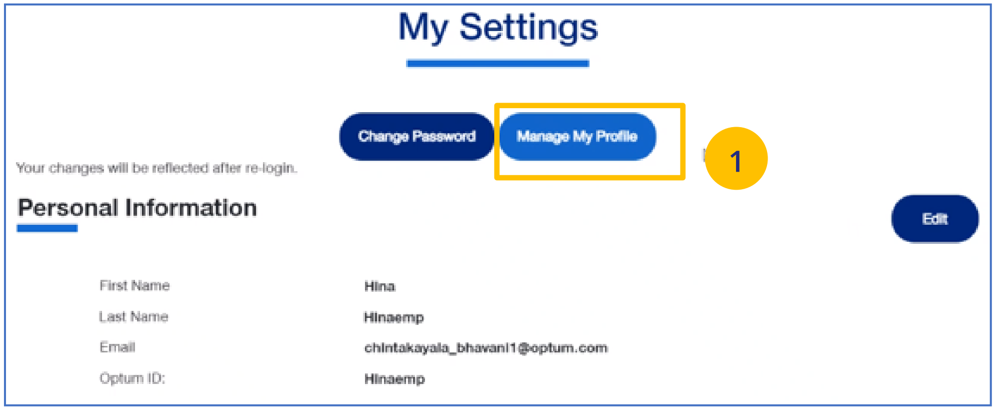
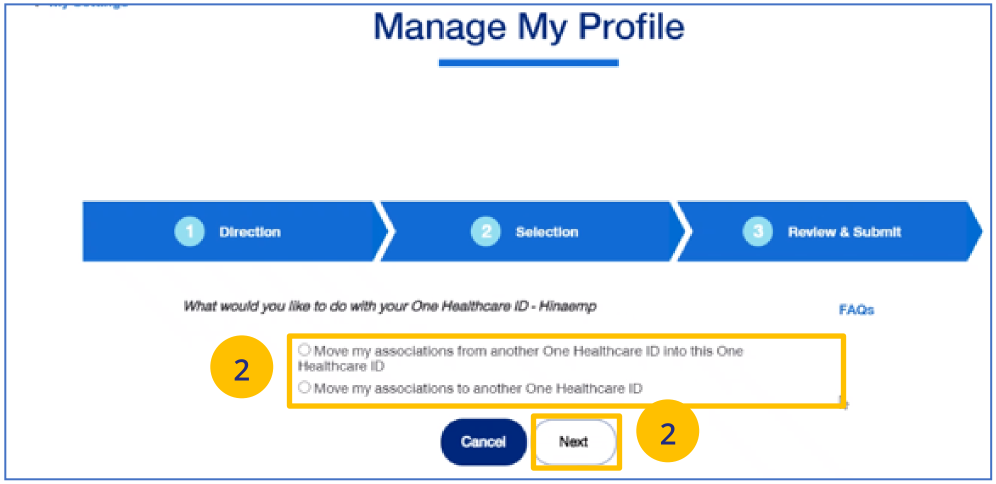
To manage your One Healthcare IDs or to move Associations, follow the steps below:

Note: Click here for FAQs related to this topic.

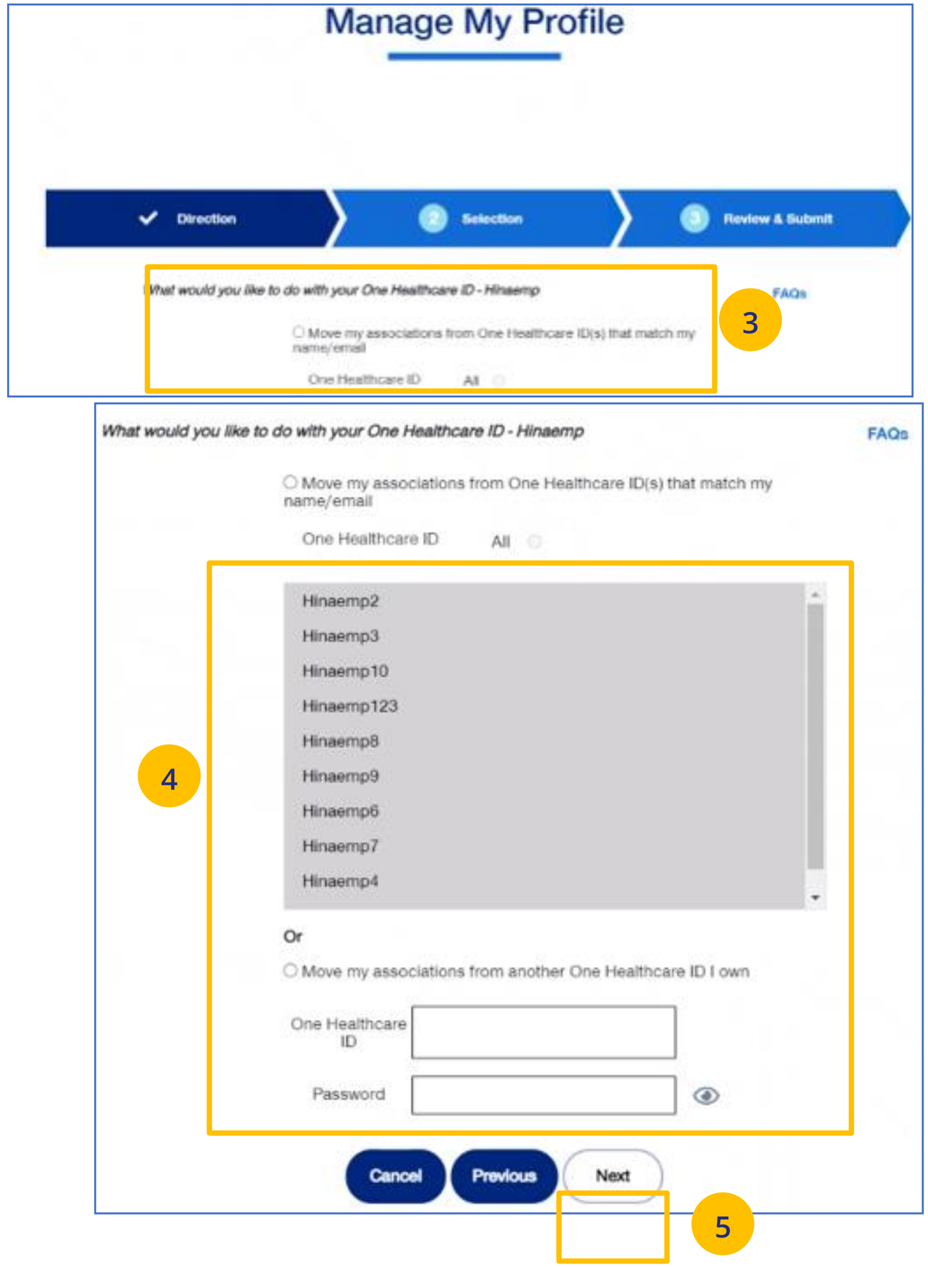
1. Click the **Manage My Profile** button.
2. You have the option to move associations from another ID to your logged-in ID, or to another ID from your this logged-in ID. Select the button that indicates what you want to do and click **Next**.





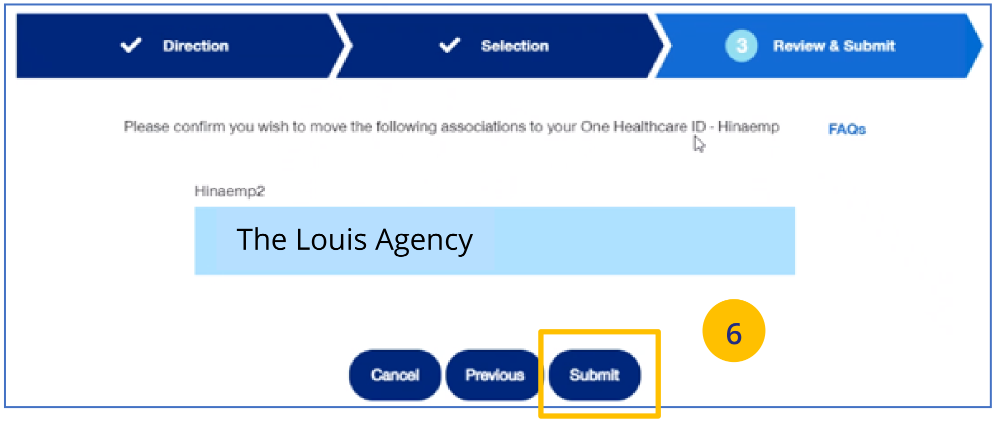
4 | Manage My Profile (continued)

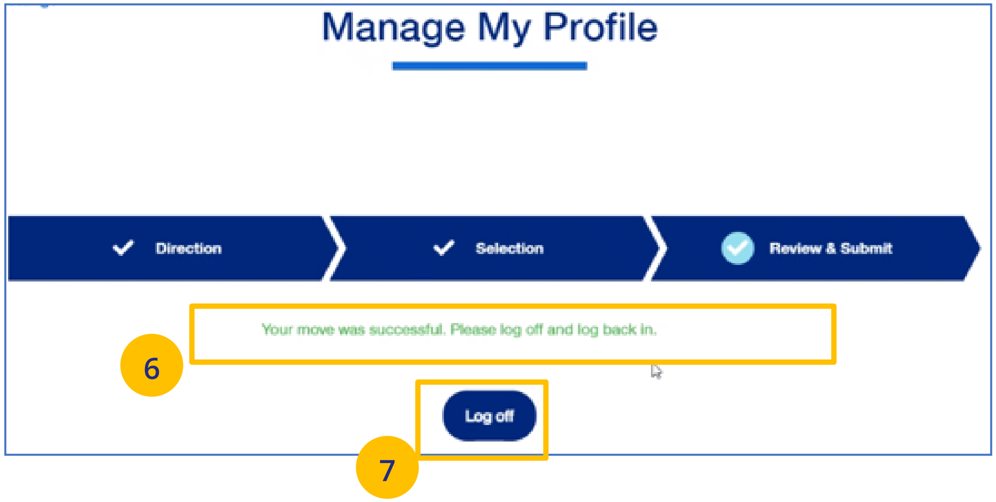
3. **Move Associations**: Choose one or more existing IDs that match their name and email, **or** manually enter the ID/password for another ID.
4. **Move Associations**: This page shows the list of associations under the ID chosen on the previous page. User will submit and get the success message.
5.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



4 | Manage My Profile (continued)

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





4 | Manage Employer

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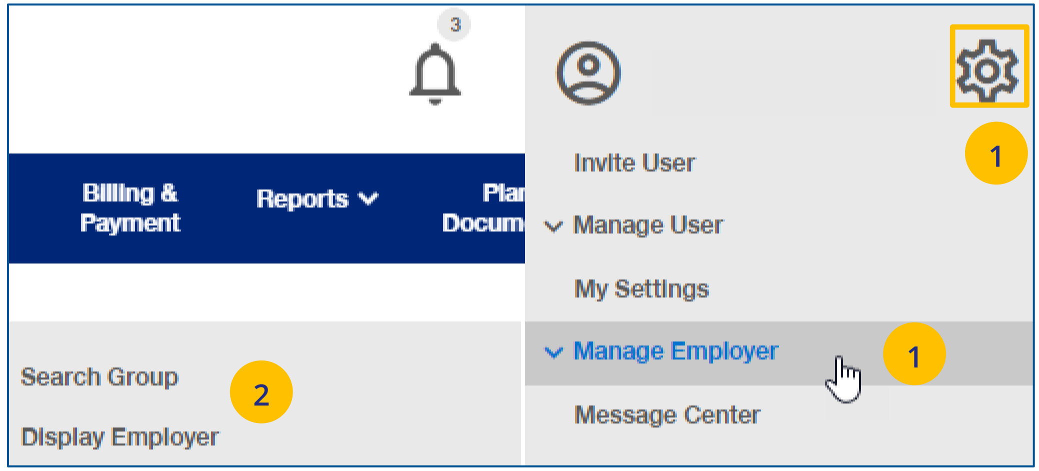
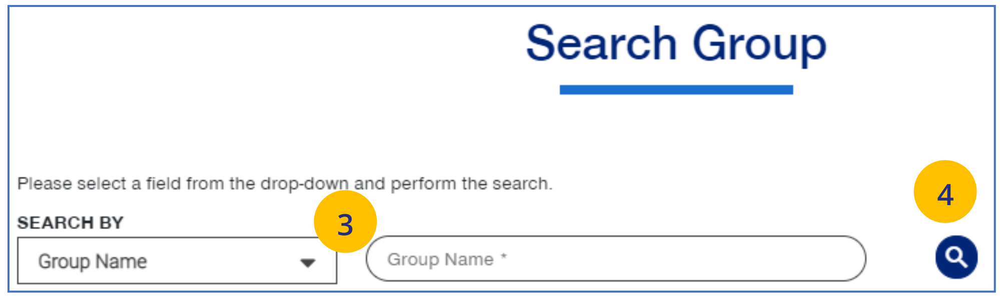
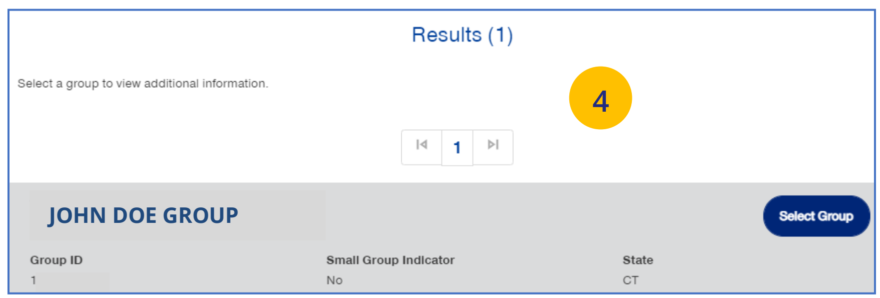
To search for an employer. follow the steps below:

1. Click the **gear icon** and select **Manage Employer**. You will have two options:
   - **Search Group**
   - **Display Employer**
2. Select one of the options to display the **Search Group** screen.
3. Enter the search criteria, either Group Name or Group ID.
4. Click the **Search** icon. The search results will be shown.



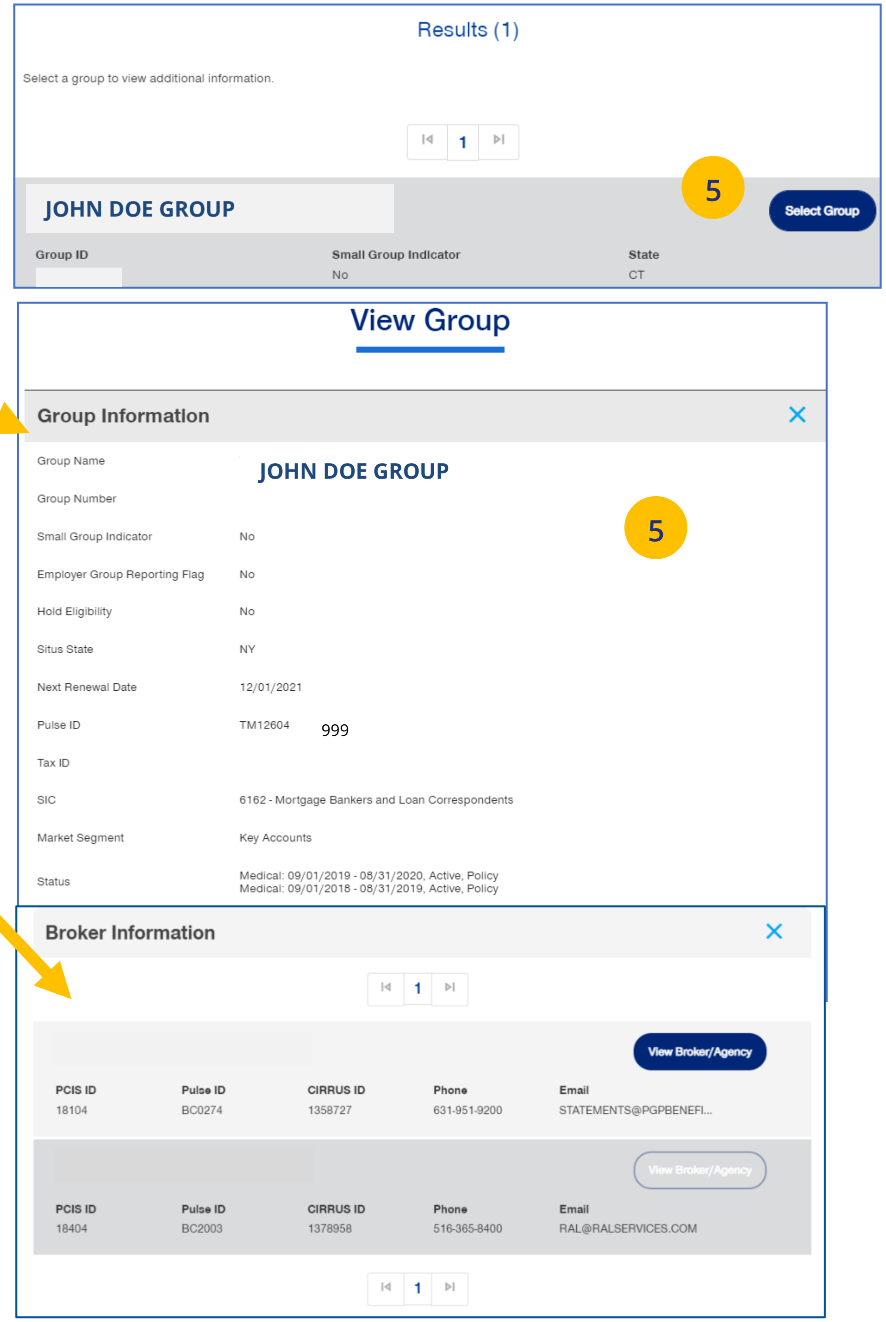




5. Click **Select Group** for the group whose information you need. The **View Group** screen displays with information on the group.

   Note: When you view detailed information for a specific Group, you will see the **Group Information**, **Group Address** and **Benefit Administrator Contact Information** sections.

   Note: In the **Broker Information** section, the Broker will only have access to the PCIS ID they have a relationship to.



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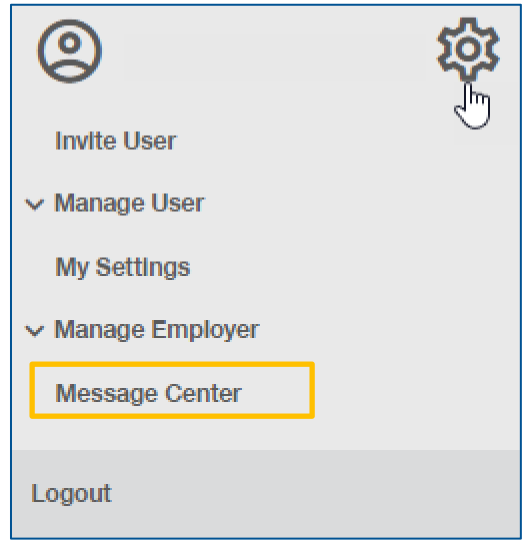
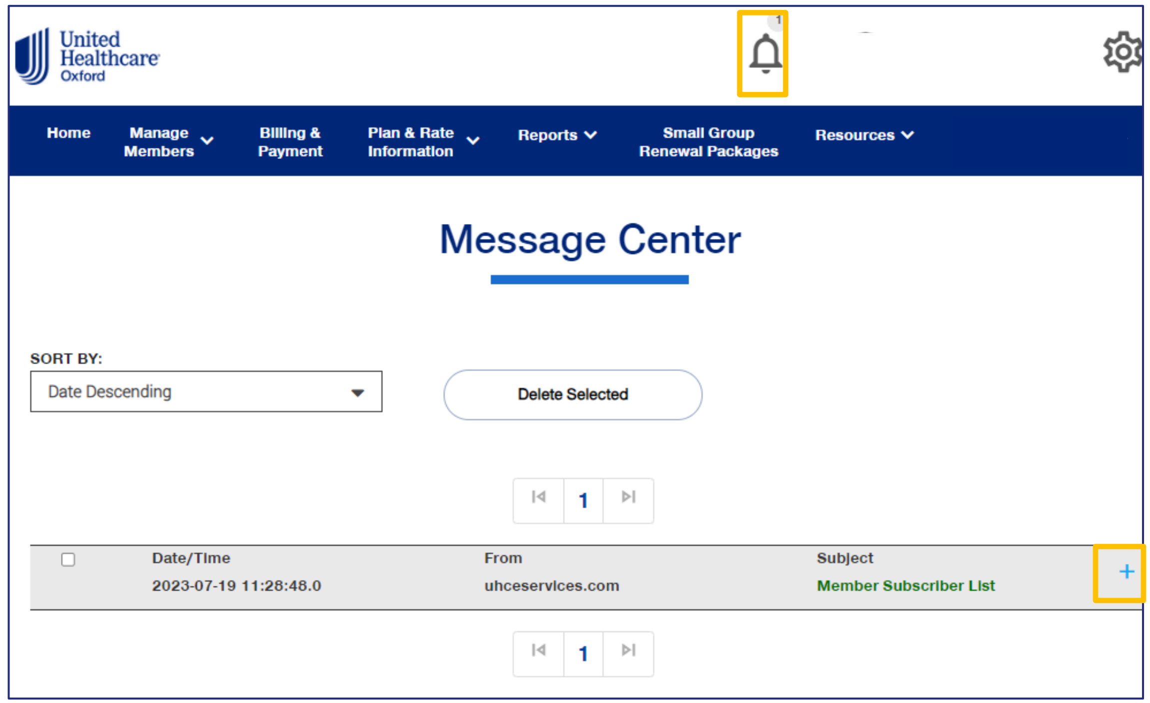
4 | Message Center

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.





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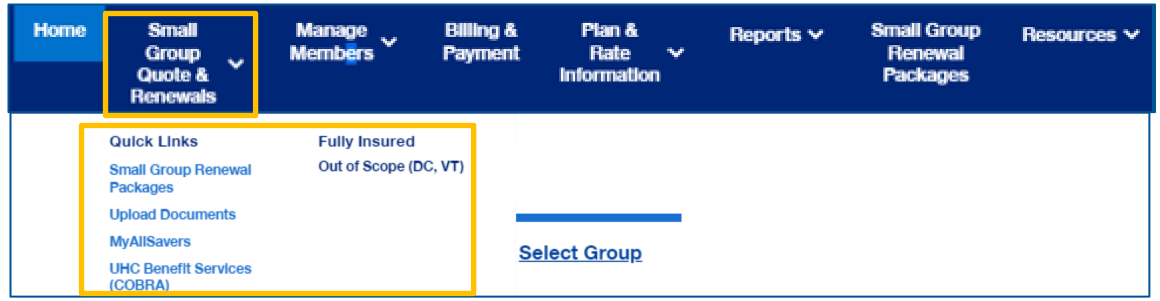
5 | Small Group Quoting & Renewals

The **Small Group Quoting & Renewals** tab gives you access to the Small Group Renewal Documents, Upload Documents, MyAllSavers and UHC Benefit Services (COBRA).



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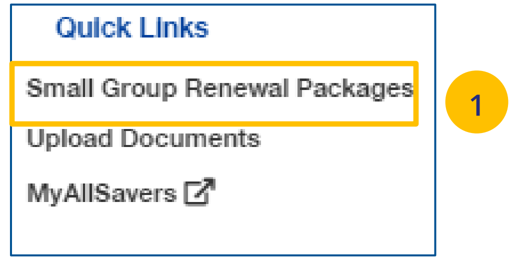
5 | Quick Links: Small Group Renewal Packages

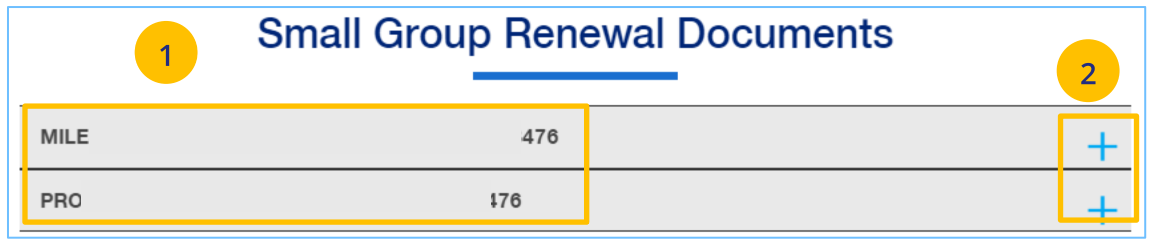
The **Small Group Renewal Packages** link is used to view the renewal documents for groups or brokers.

1. Click **Small Group Renewal Packages**. The **Small Group Renewal Documents** screen displays with the group names shown.
2. Click the **Plus Sign** to view details on the group and the link to the Renewal Documents.

   Note: The message **No Groups available for renewal at this time** will be shown if applicable
3. Click the **Renewal Document** link to download and view the document in pdf format.

Note: Employers will see groups eligible for renewal 60 days before the group's renewal date.





5 | 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.**

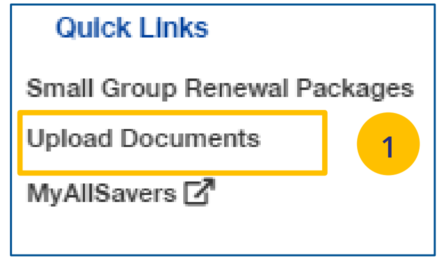
Note: **Upload Documents** is not applicable to **UnitedHealthcare HMO**.

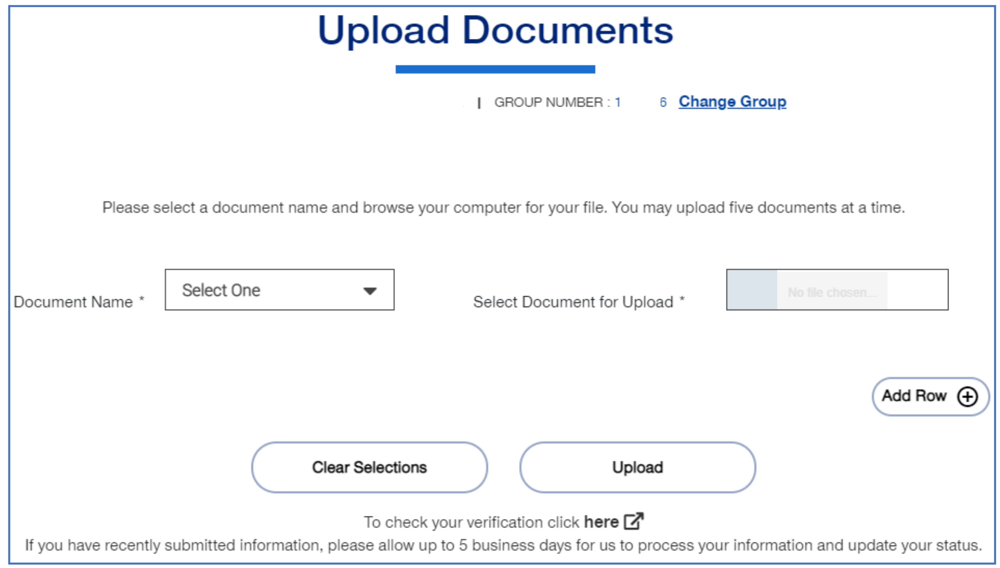
Note: Access to **Upload Documents** is available only to users with the following roles:

- 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.

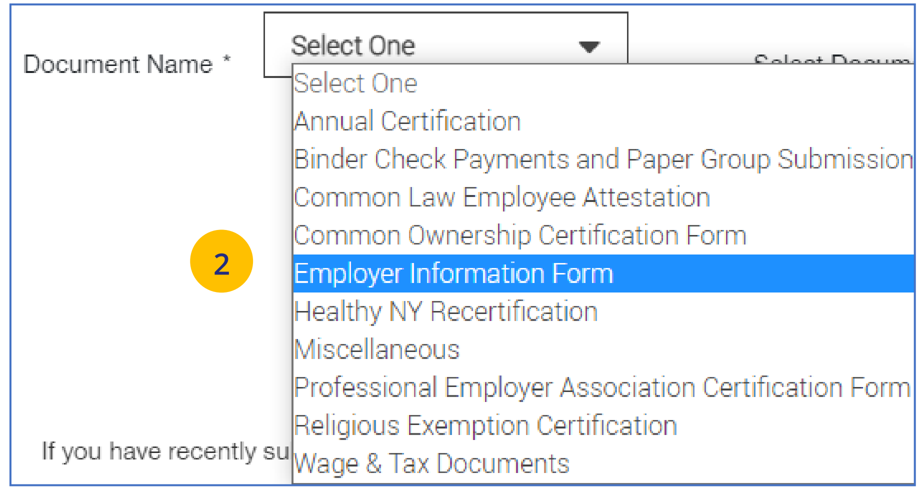
1. Click the **Upload Documents** link. The **Upload Documents** screen displays.

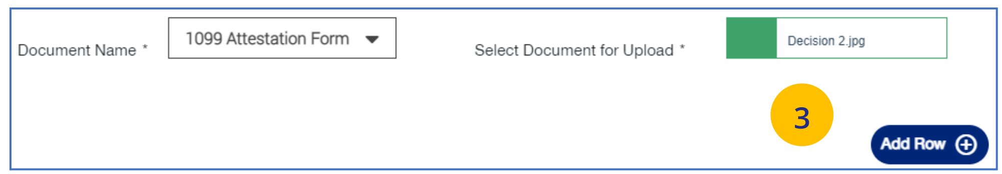


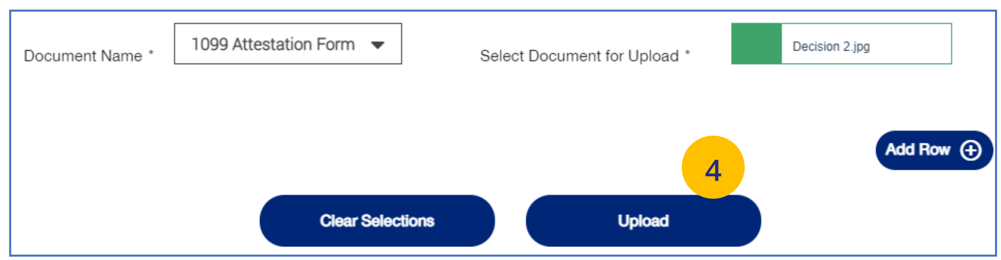


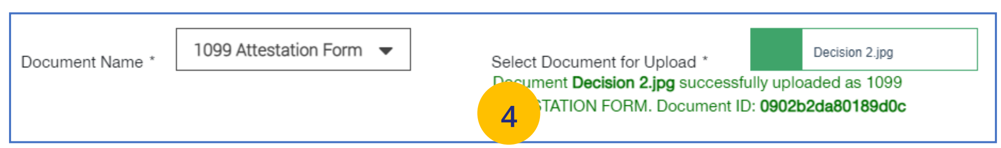
5 | Quick Links: Upload Documents (continued)

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.





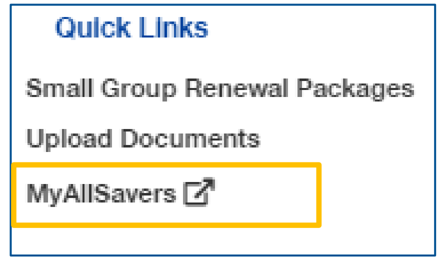


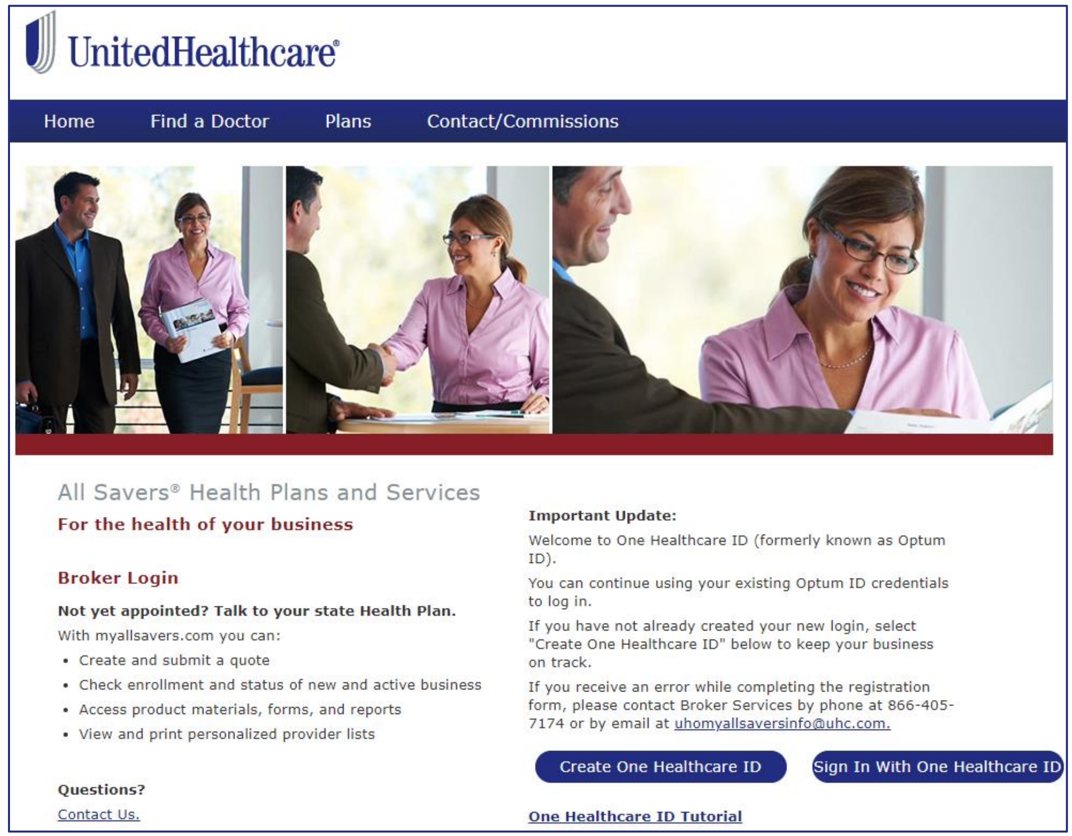


5 | Quick Links: MyAllSavers (Level Funded)

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

Note: First Time Access – When you click the **MyAllSavers** link 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 have the benefits of single sign-on.





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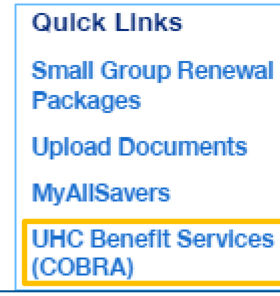
5 | Quick Links: UHC Benefit Services (COBRA)

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

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



6 | Manage Members

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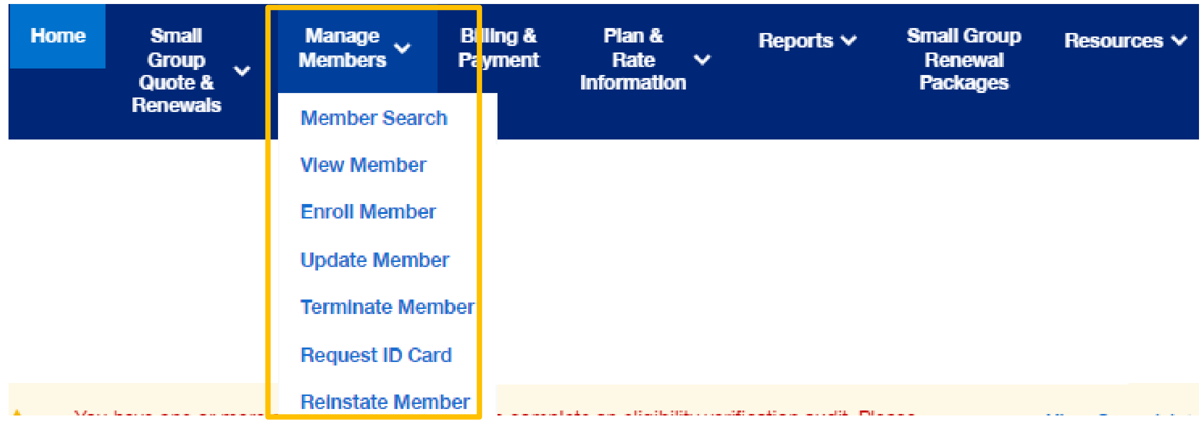
The **Manage Members** tab gives you access to the following:

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



6 | Member Search / View Member

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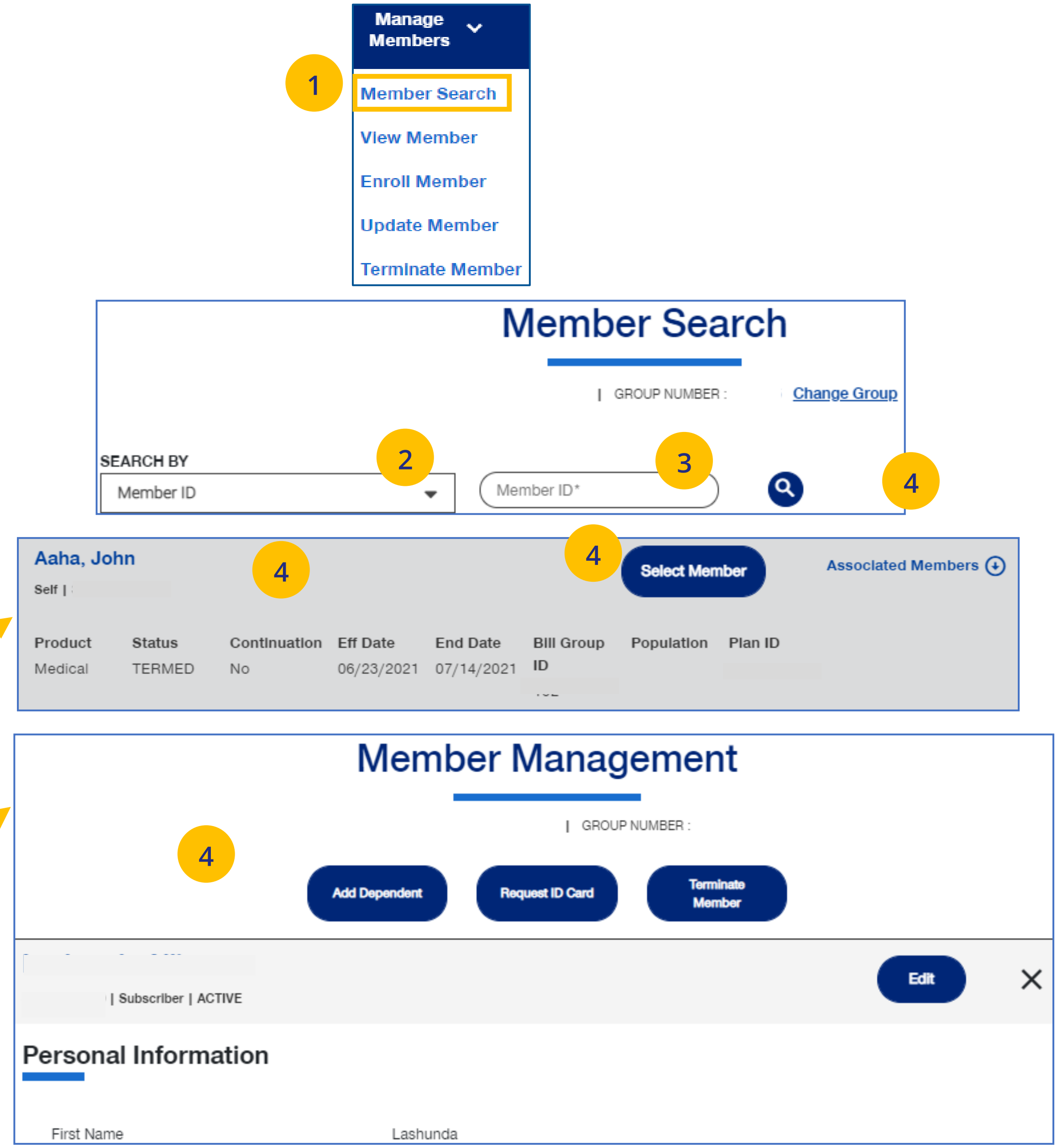
The **Member Search** and **View Member** tabs are used to search for a specific member record. **They both perform the same function.** You can search for a member using one of the following options:

- 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).



8 | Enroll Member

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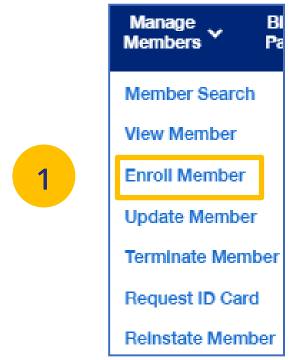
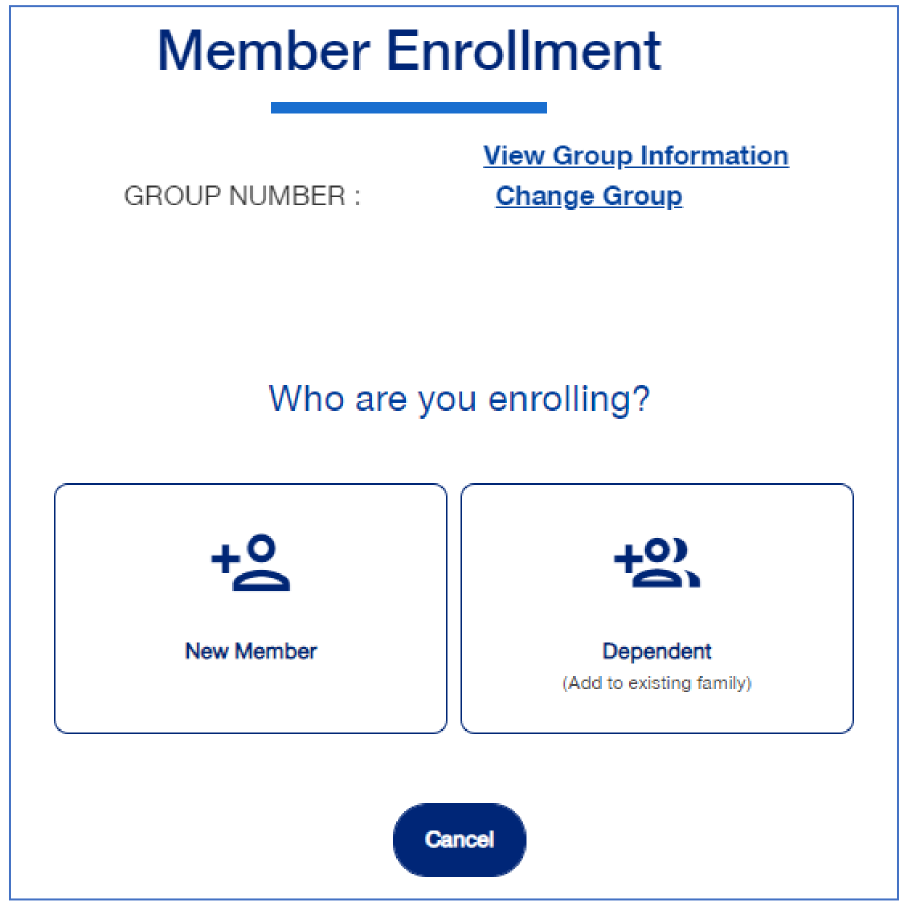
Enroll Member is used to add a new member or new dependent member to a group.

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.





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8 | Enroll Member: Demographics

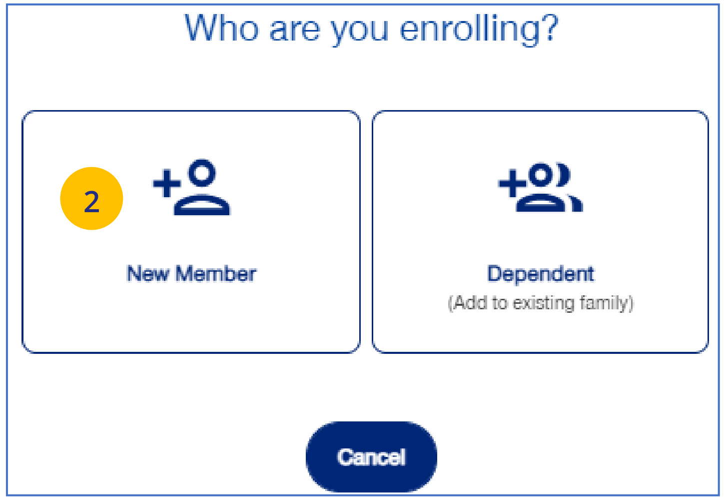
The enroll member process walks you through the **Demographics** and **Coverage** sections, then asks you to **Review & Submit** the new member information.

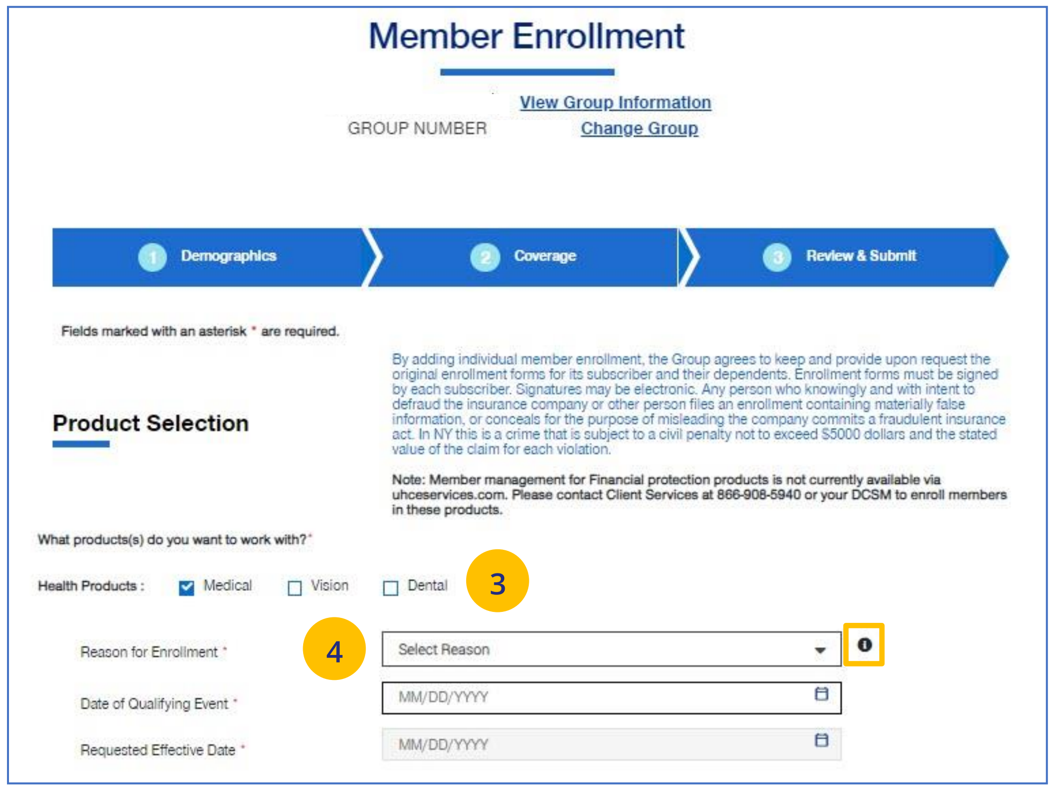
To enroll a new member:

2. Click the **New Member** box. The **Member Enrollment** detail screen displays.
3. Select the appropriate **Health Products**.
4. 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.

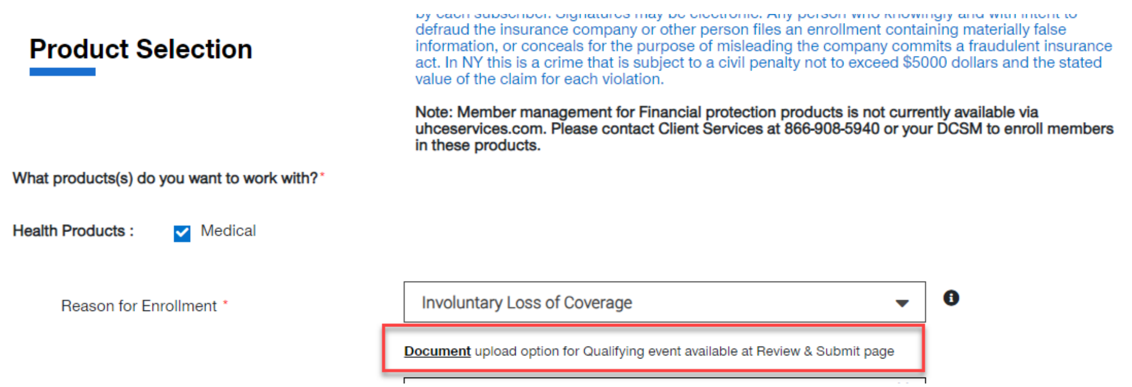
   Note: An information icon will display at the end of the **Reason for Enrollment** field. Click the icon to display a **Reason for Enrollment** pop-up box that shows more information on active enrollment and COBRA enrollment. **See the screen on the following page.**





After selecting a qualifying event, a document upload box may appear letting you know that you will be asked to upload a proof document once you get to the Review & Submit page. This is optional.

If you click **Document,** a pop up will show more information on document types based on enrollment reason.



Reason	Document Types
Birth	Birth certificate from State/County
Legal Adoption or Placement for Adoption	Legal Adoption Court Order or, Legal Adoption Placement Court Order
Marriage	Official copy of state-issued Marriage License - should be notarized and/or contain seal from state/country. Certificates from church are not acceptable documentation.
Legal Guardianship	Court issued Guardianship Order
Court or Administrative Order of support	Qualified Domestic Child Support Court Order filed with courts indicating the subscriber is required to carry the health benefits for the dependent. Must include names of parents and children.
Domestic Partner	State or local certificate of registration of domestic partnership, as required by each state if required to be registered. Otherwise lease/loan/bank statement showing

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.

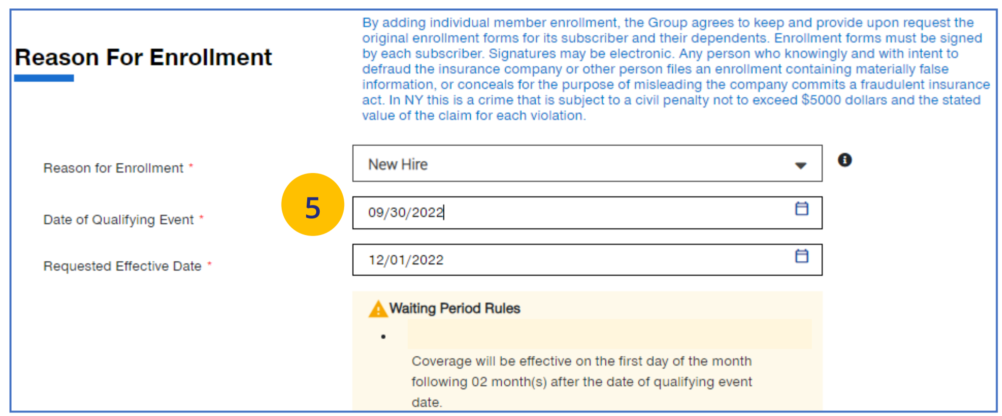
   Common examples of qualifying events include the birth or adoption of a child, death of a spouse, or a change in marital status.

   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.

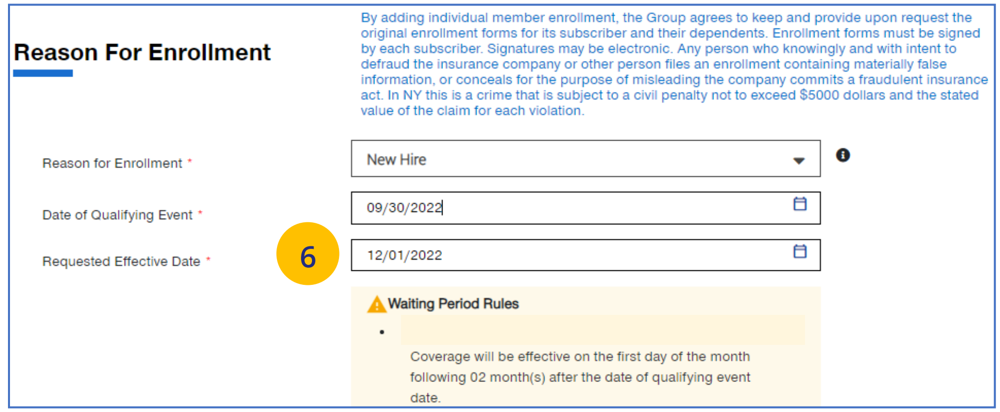
   Note: If you select **New Hire** or **Initial Enrollment** for the **Reason for Enrollment**, the **Requested Effective Date** will populate after you enter the **Date of Qualifying Event**. The **Waiting Period Rules i**ndicate the specific rules that will apply for effective dates based on the group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



display the **Actual Effective Date** you entered.

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

6. 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.



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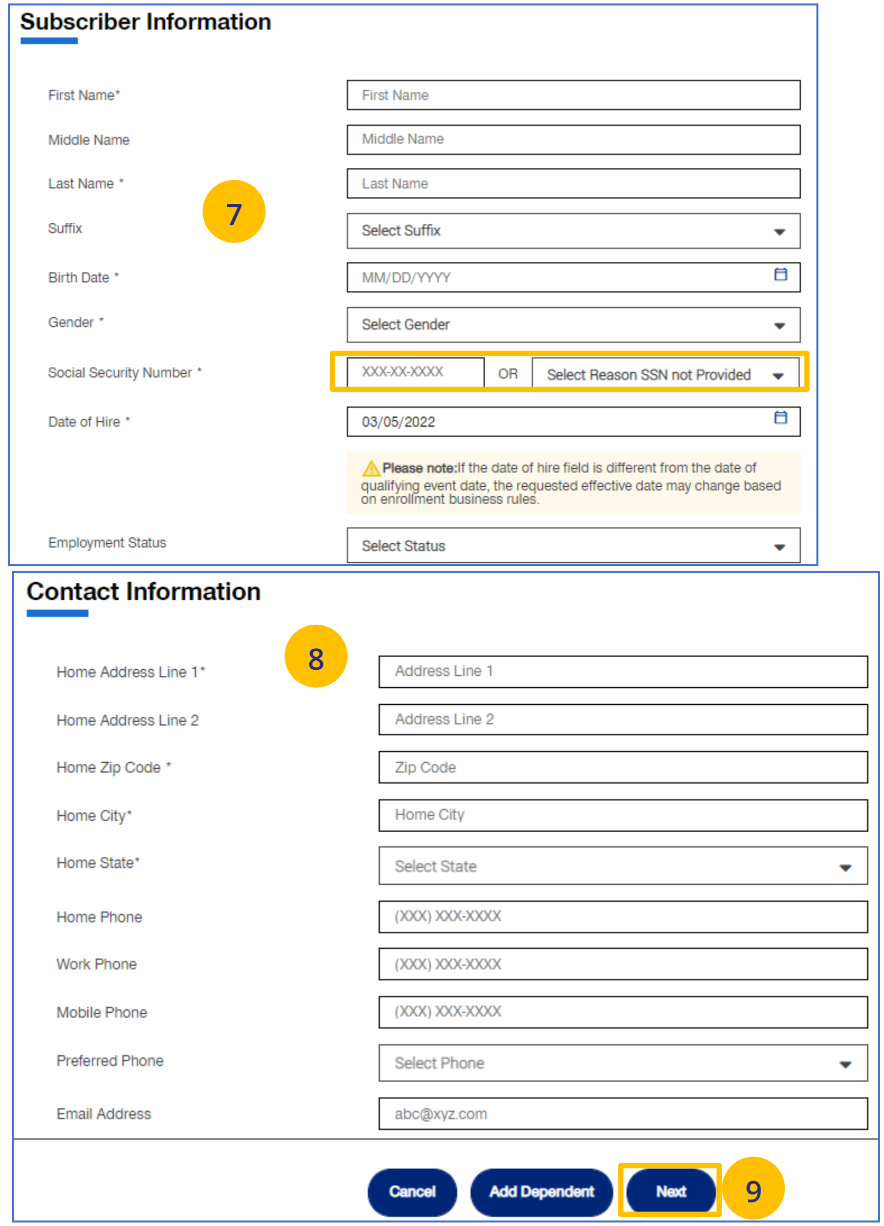
7. Enter information in the **Subscriber information** fields. **Note: Social Security Number -** For **UnitedHealthcare HMO** users, the **Select Reason SSN Not Provided** dropdown will not be available.

   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.**



8 | Enroll Member: Coverage - Medical

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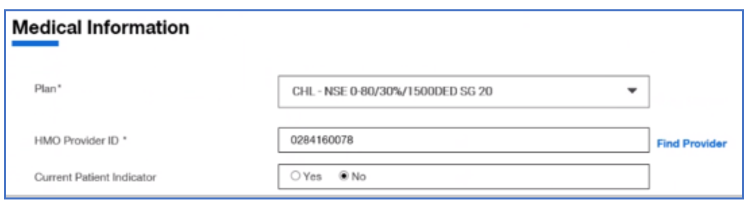
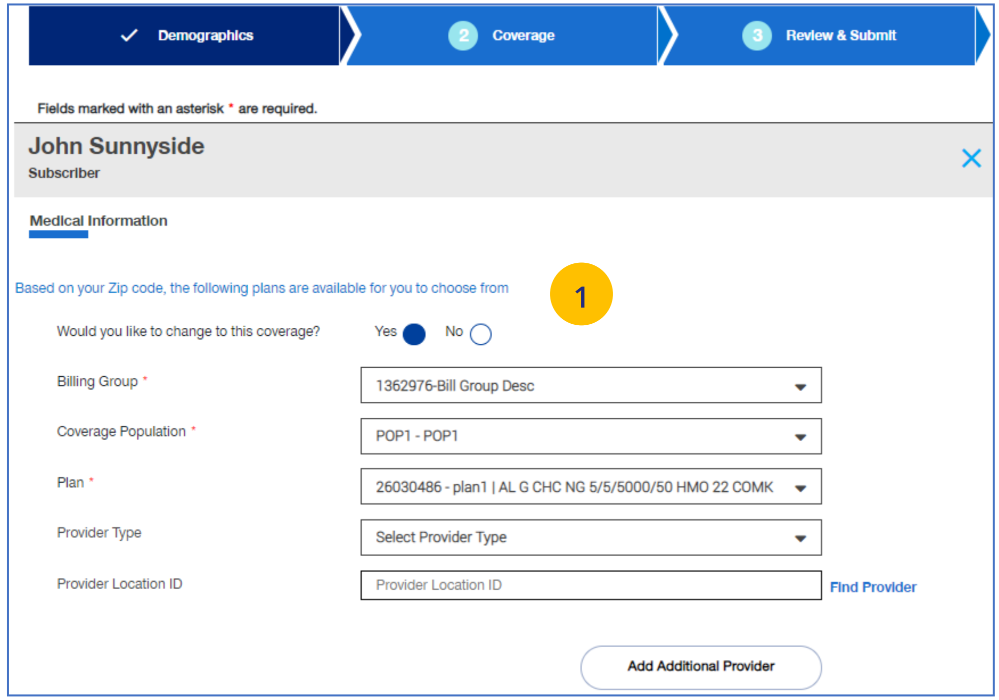
1. In the **Coverage** section, enter the subscriber's **Medical** coverage information in the **Medical Information** area.

   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.



2. Click **Next.**



8 | Enroll Member: Coverage - Medical (continued)

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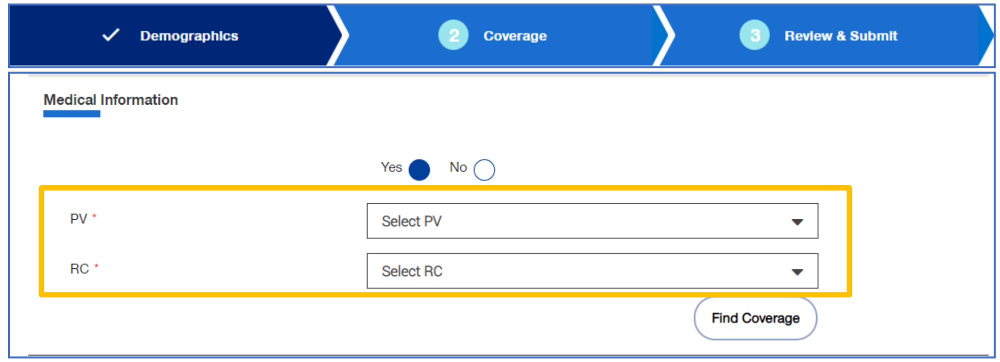
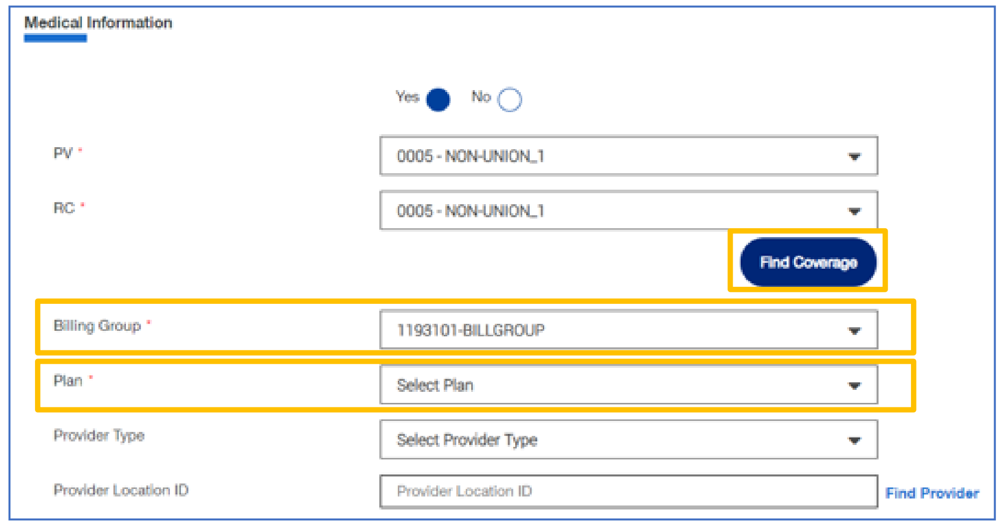
Note: Some groups may be set-up with **PV (Plan Variation)** and **RC (Reporting Code)** structure.

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.



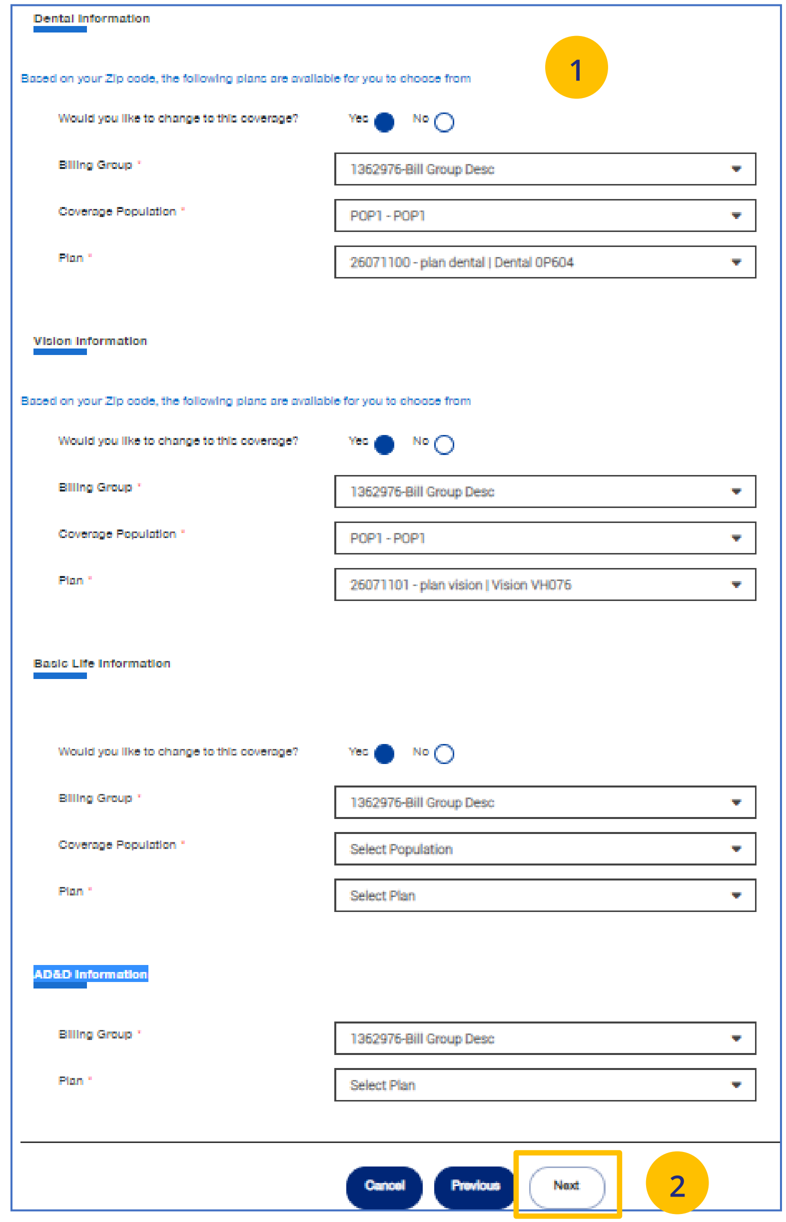


8 | Enroll Member: Coverage - Specialty, Basic Life and AD&D

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

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

2. Click **Next.**



8 | Enroll Member: Document Upload, Review, & Submit

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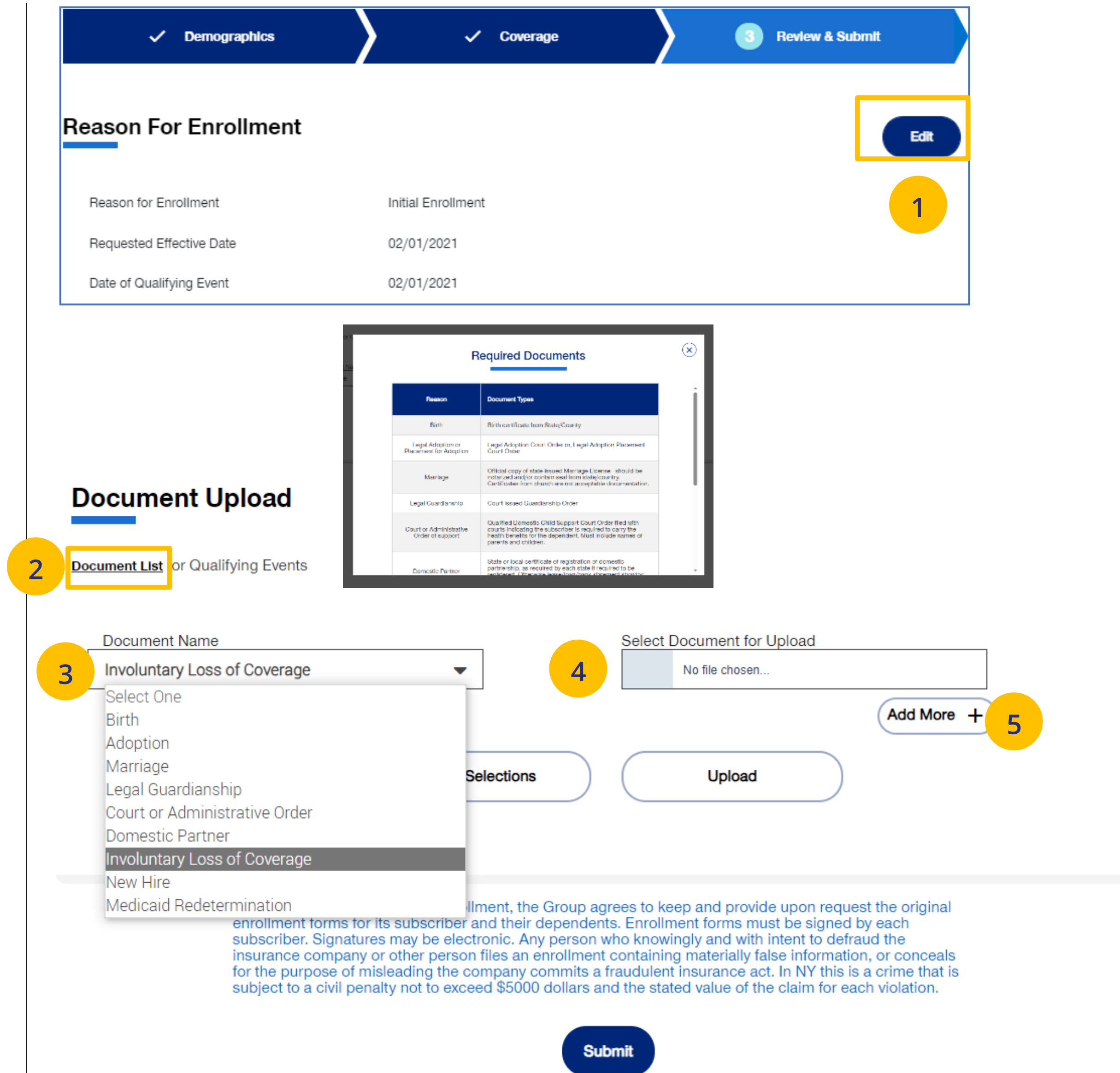
1. Review the information. If edits are needed on any of the information shown, click **Edit**.
2. Document upload section may appear at the bottom. Clicking **Document List** opens pop up for more information on document types based on enrollment reason. This is optional.
3. Select document type from the drop down.
4. Upload document through "**Select Document for Upload**"
5. If you have more than one document to upload, click on "**Add More +** "



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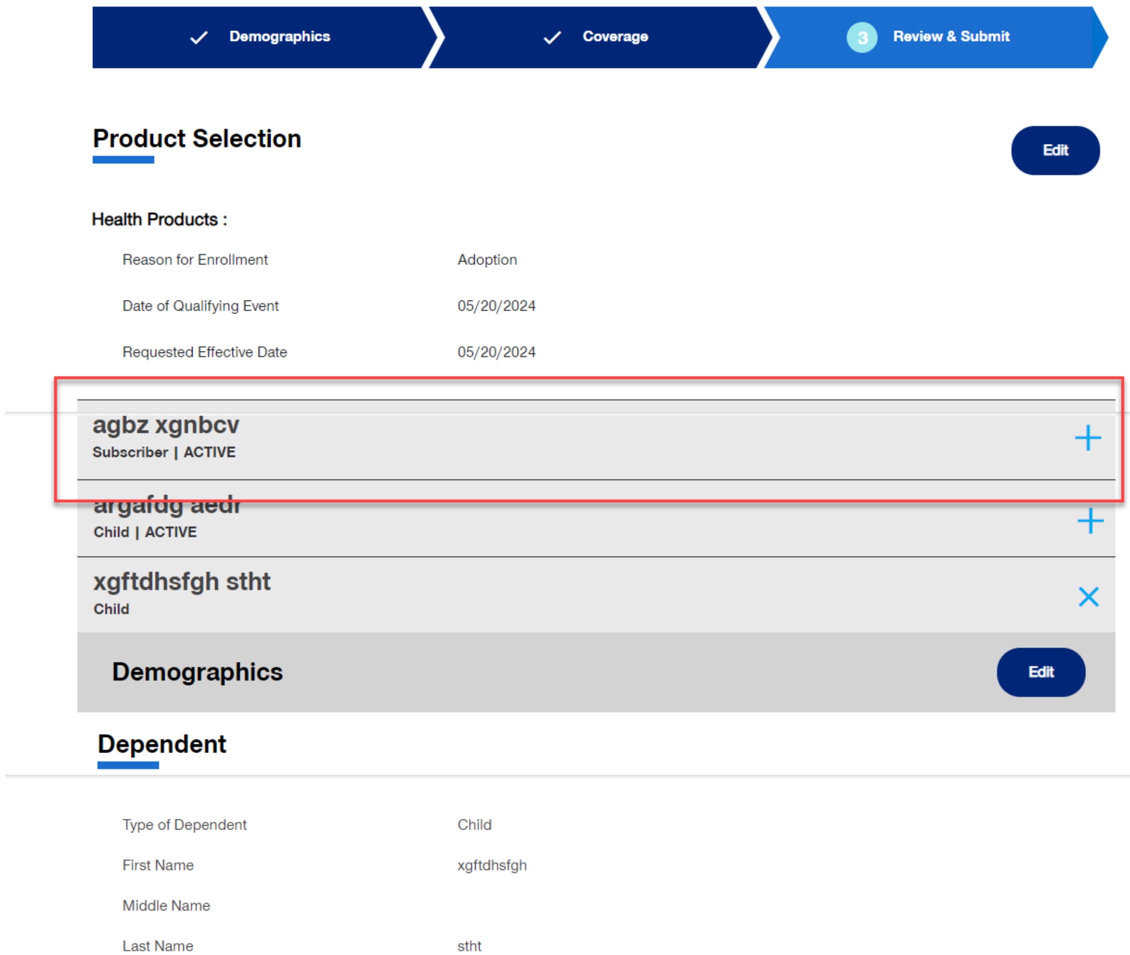
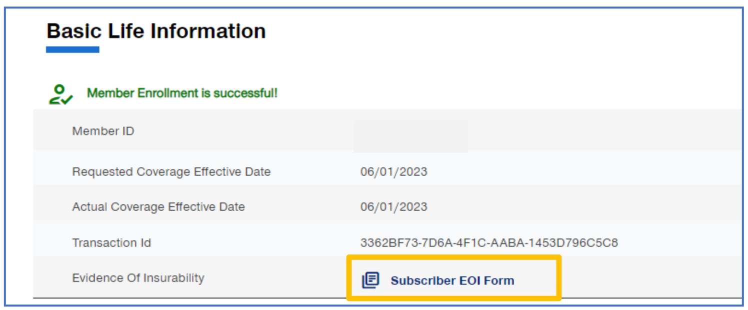
When adding a dependent to an existing subscriber, the document upload section will be under the subscriber. Expand the subscriber accordion to upload documents.



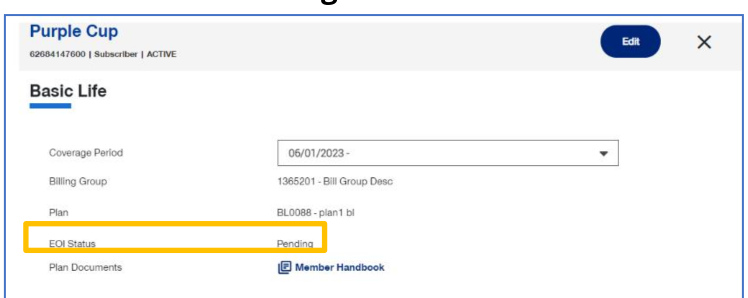
8 | Enroll Member: Document Upload, Review, & Submit (continued)

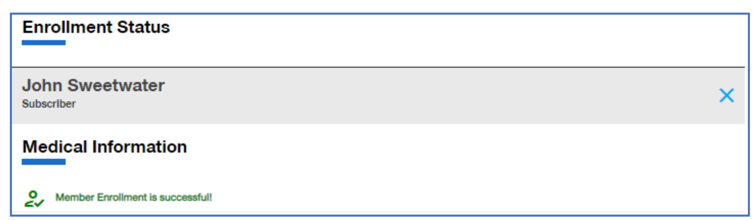
6. Review the information. If edits are needed on any of the information shown, click **Edit**.
7. If all the information is correct, scroll down and click **Submit**. A confirmation message tells you that **"Member Enrollment is successful**." You will see the Member ID number and a link to the Member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



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





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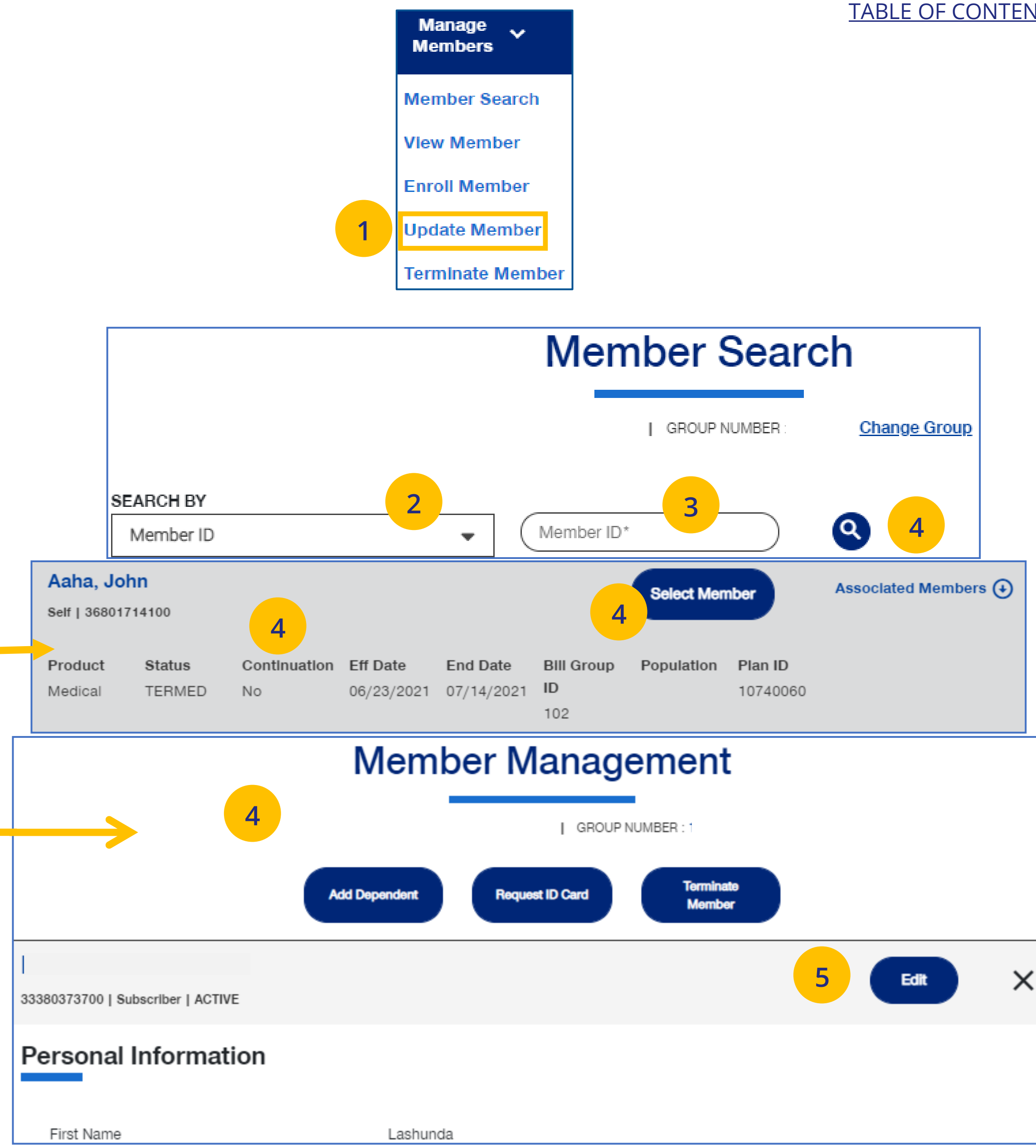
6 | Update Member

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.



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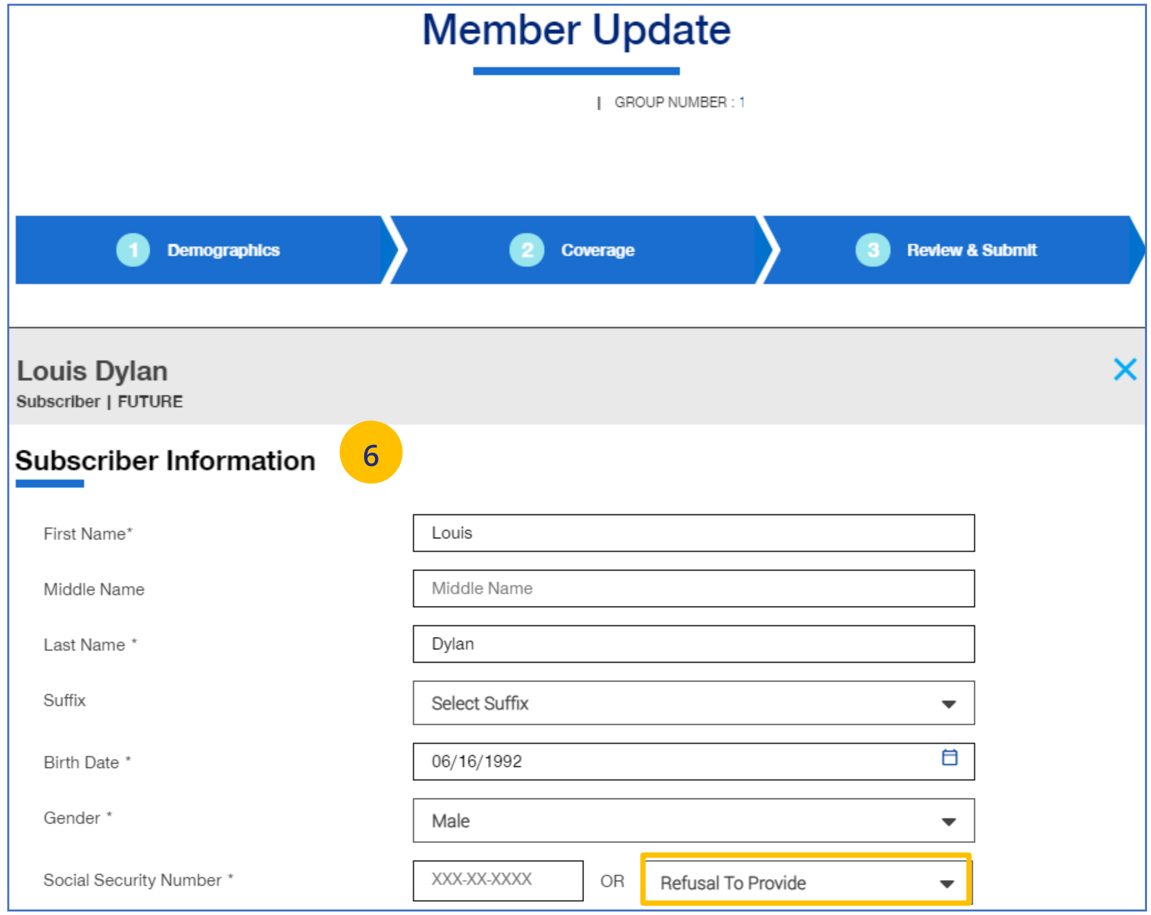
6. Update the needed information in the **Demographics** section if needed. You will have to scroll to see all fields.

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

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

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



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

If you are only trying to add or edit the provider and not looking to make any plan changes, the only fields which will need to be completed are the Provider Effective Date, Provider Type and Provider Location ID.

Note: Please do not enter a requested effective date in the field at the top of this page unless you are looking to make changes to the coverage.

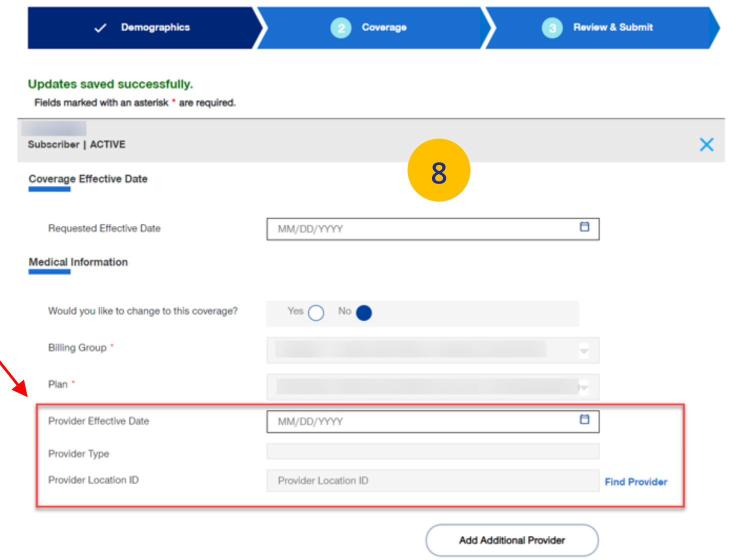
Note: This page can look a little different based on either the coverage offered or on the group type.

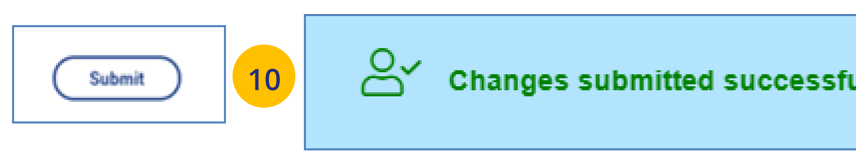
Note: Billing Group – In the Billing Group area, you can narrow your search for a billing group by typing in the first few letters or number in the billing group.

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

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.





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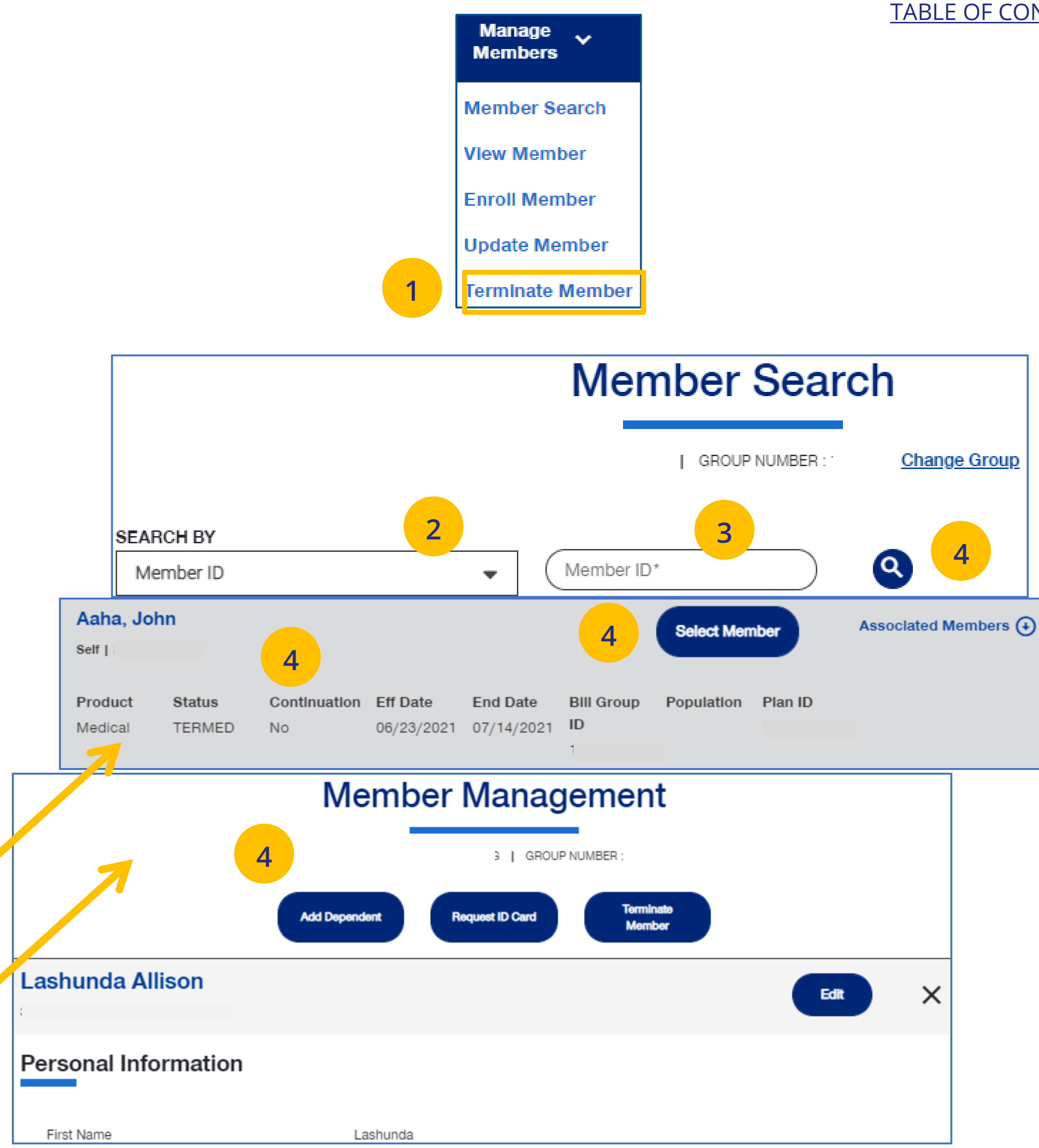
6 | Terminate a Member's Coverage

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

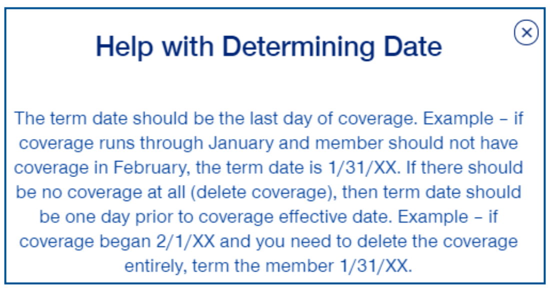
To search for and terminate a member:

1. Select **Terminate Member** tab.
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.

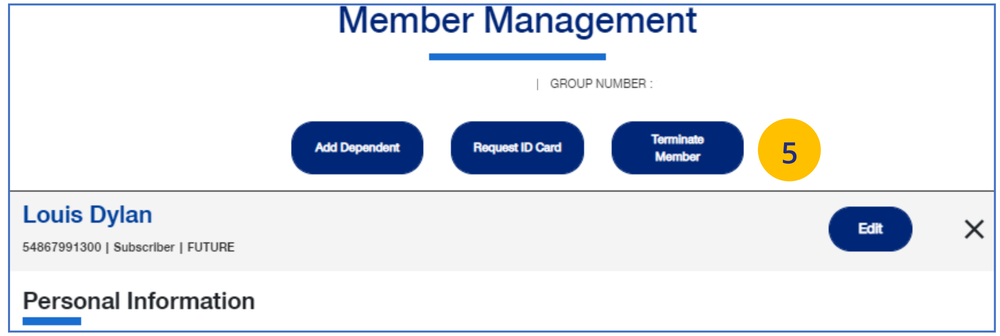


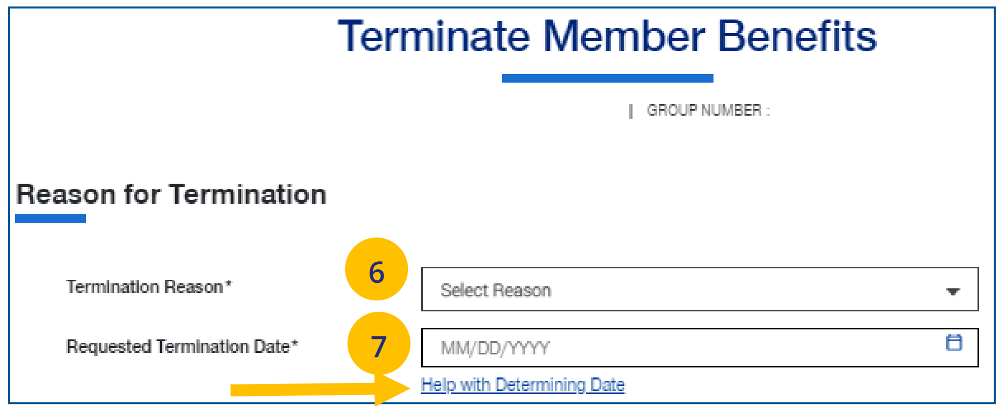
6 | Terminate a Member's Coverage (continued)

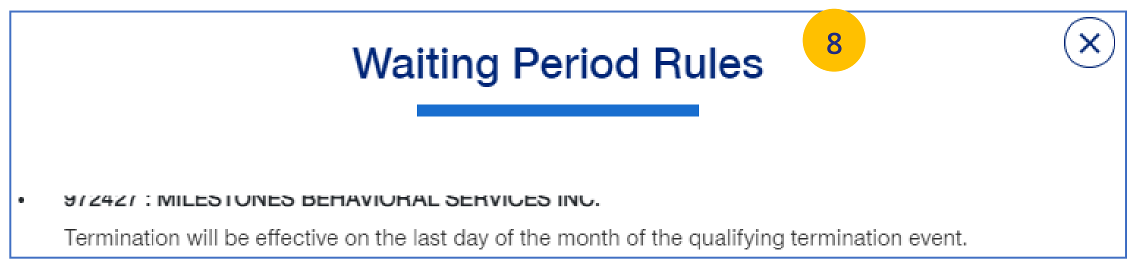
5. Click **Terminate Member**. The **Terminate Member Benefits** screen displays.
6. In **Termination Reason**, use the **Select Reason** dropdown to enter the reason for the termination. **Note: COBRA Termination** – For COBRA Terminations, select **Discontinue COBRA** for the **Termination Reason**.
7. Enter the requested termination date in the **Requested Termination Date** field.
   Note: Help with Determining Date – When you click the **Help with Determining Date** link, the following pop-up box displays:



8. Click the information icon at the end of the **Requested Effective Date** field. A **Waiting Period Rules** pop-up box indicates the specific rules that will 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. This does not apply to **UnitedHealthcare HMO** users.



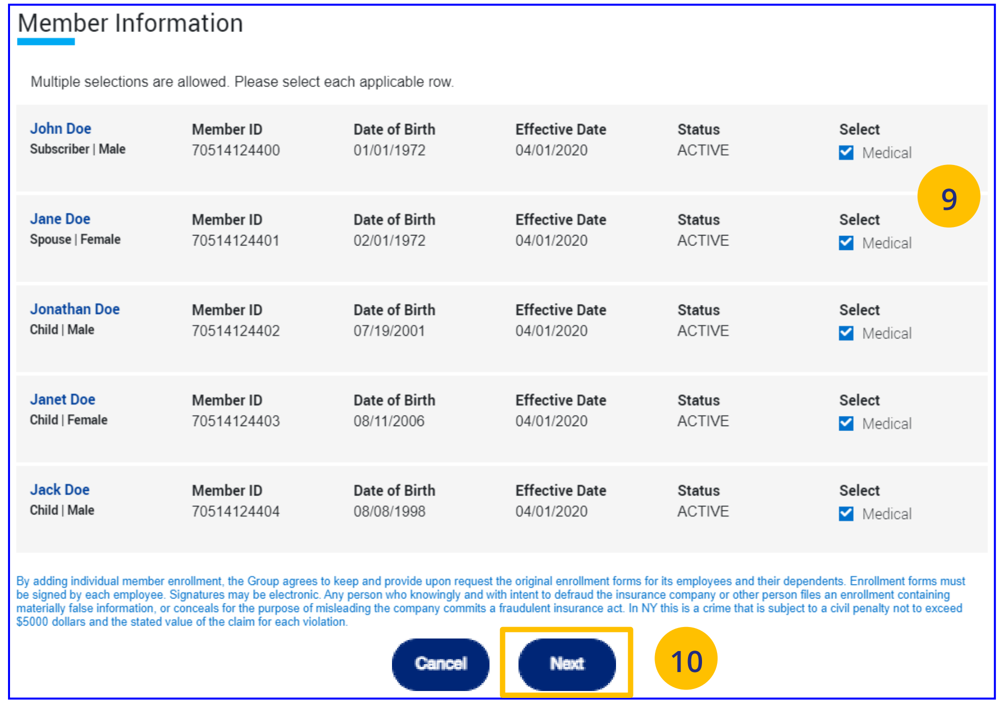




9. Scroll down to the **Member Information** section and click the **Select** box for each member whose coverage is being terminated.

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 select all dependents for termination also.



6 | Terminate a Member's Coverage (continued)

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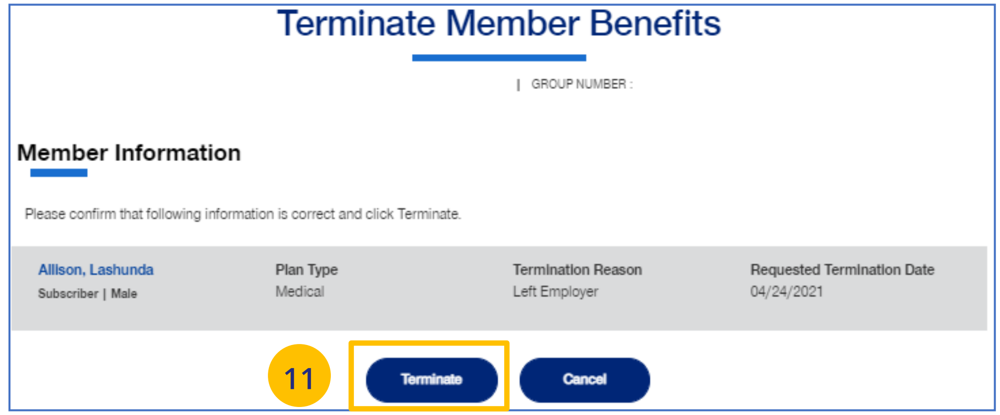
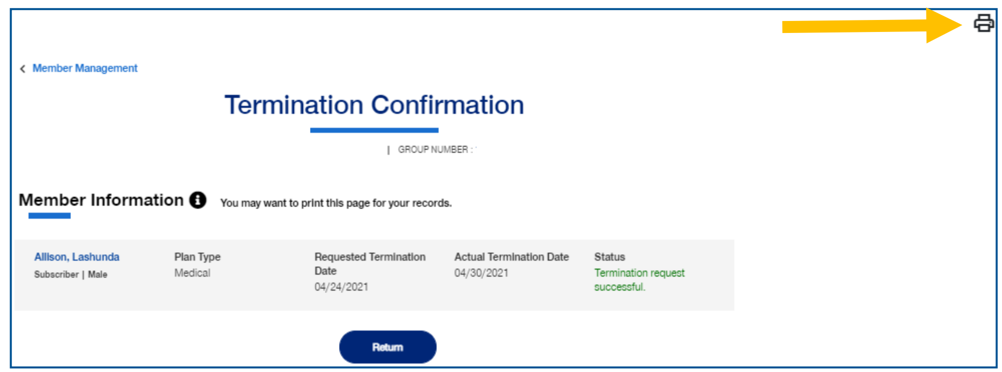
11. Click **Terminate**. A message displays telling you the member has been terminated successfully.

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





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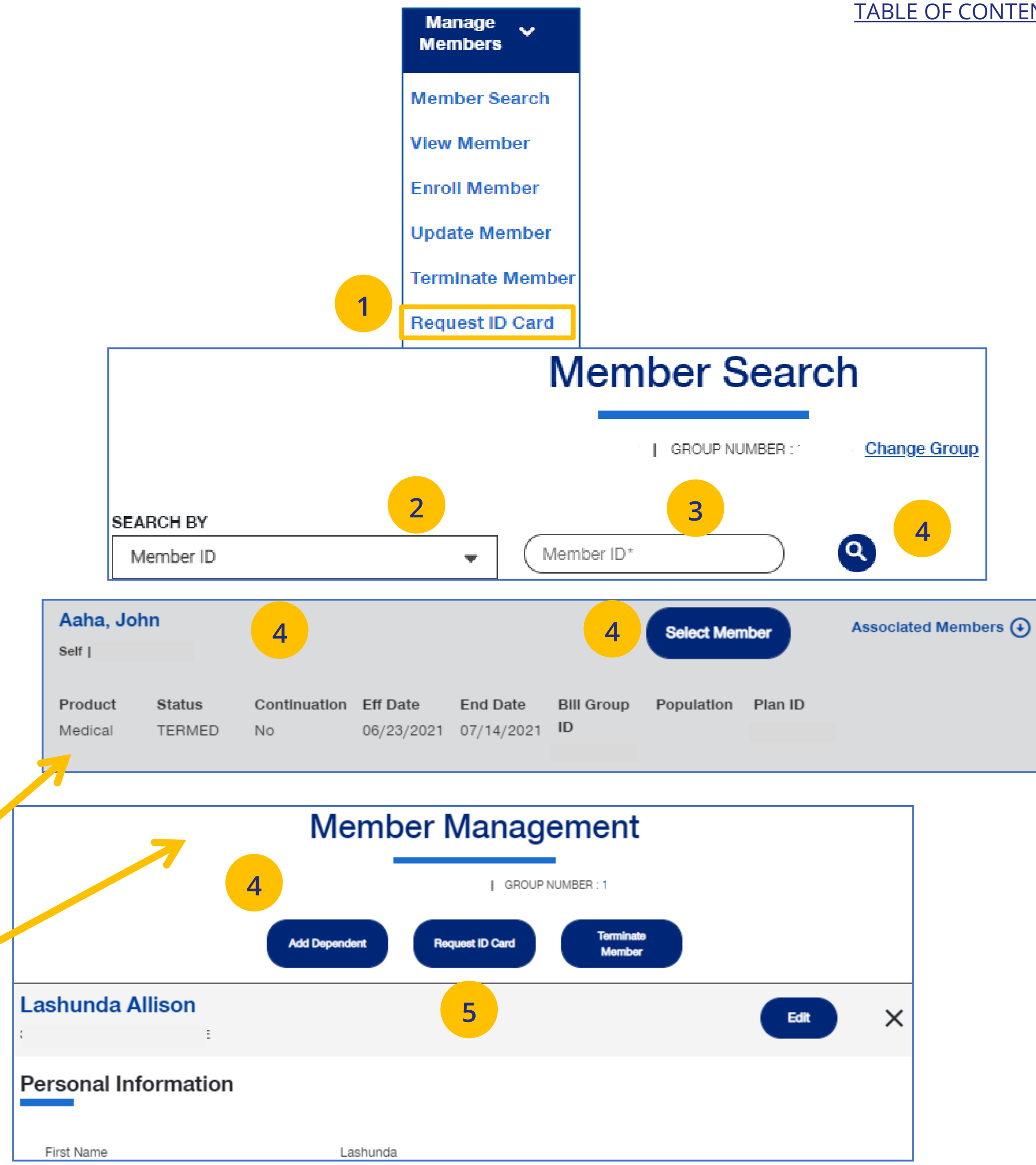
6 | Request a Health Plan ID Card

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



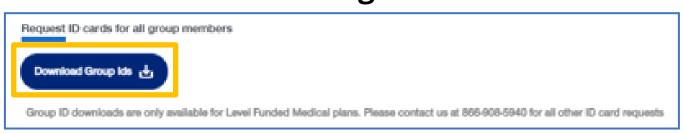
6. Select the member and (1) click **Print ID Card** to print the card or save it as a pdf, **or** (2) click **Order ID Card** to order the card. For **Dental** cards, only **Print ID Card** is available.

   The message "Request sent successfully" displays. Repeat this for other members or dependents if needed.

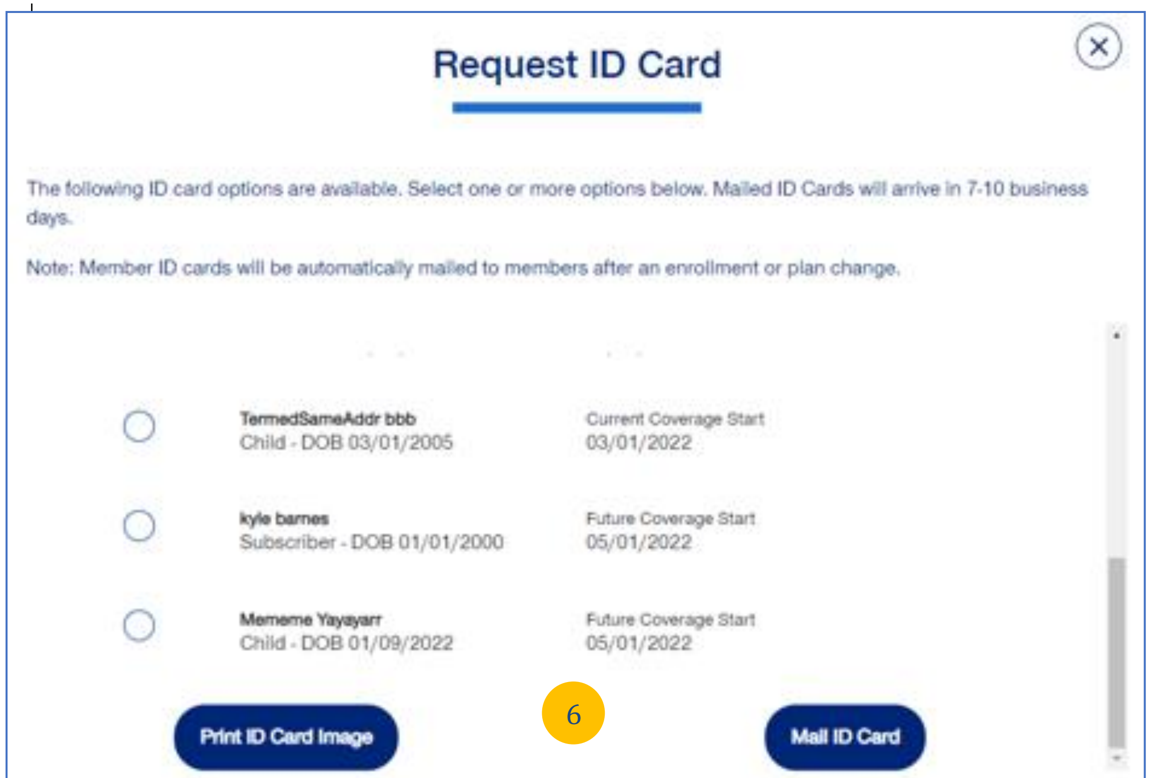
Note: If any dependent is classified as "infant," their status must be changed to "Child" before a Health Plan ID card can be ordered or printed.

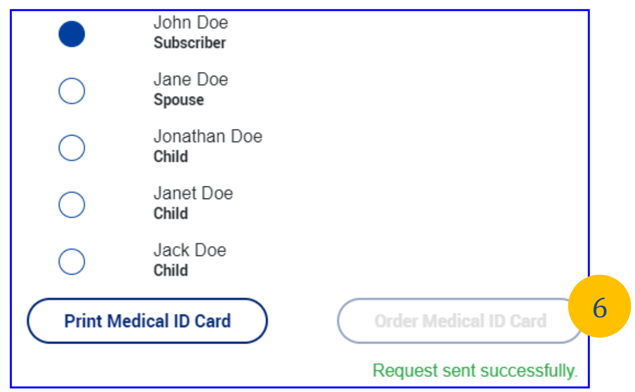
Note: If there is a member change, it will take 24 to 48 hours for a new ID card to be available.

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.



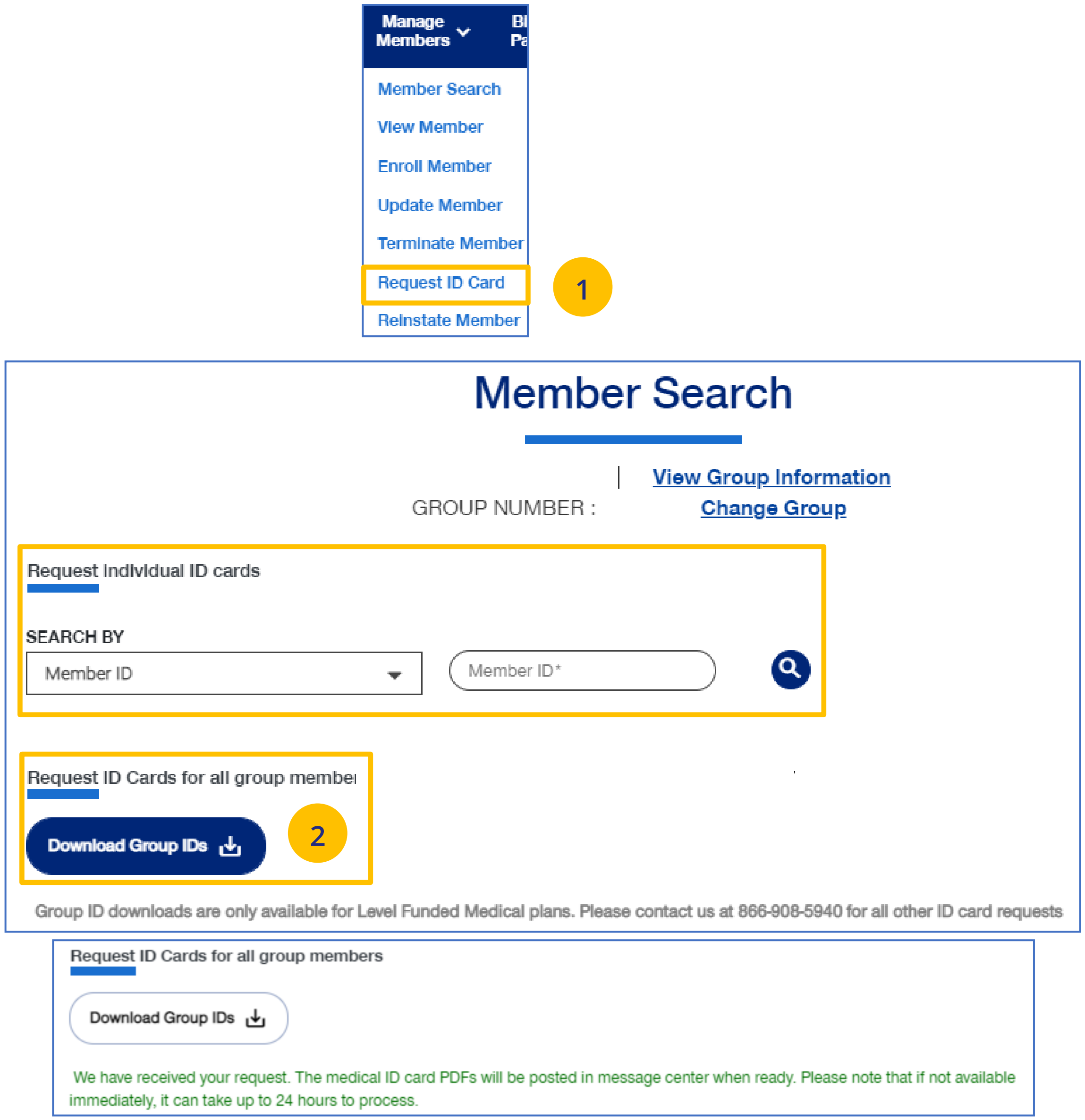


6 | Request Health Plan ID Cards for Entire Group (Level Funded Groups)

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

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

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



6 | Reinstate Member

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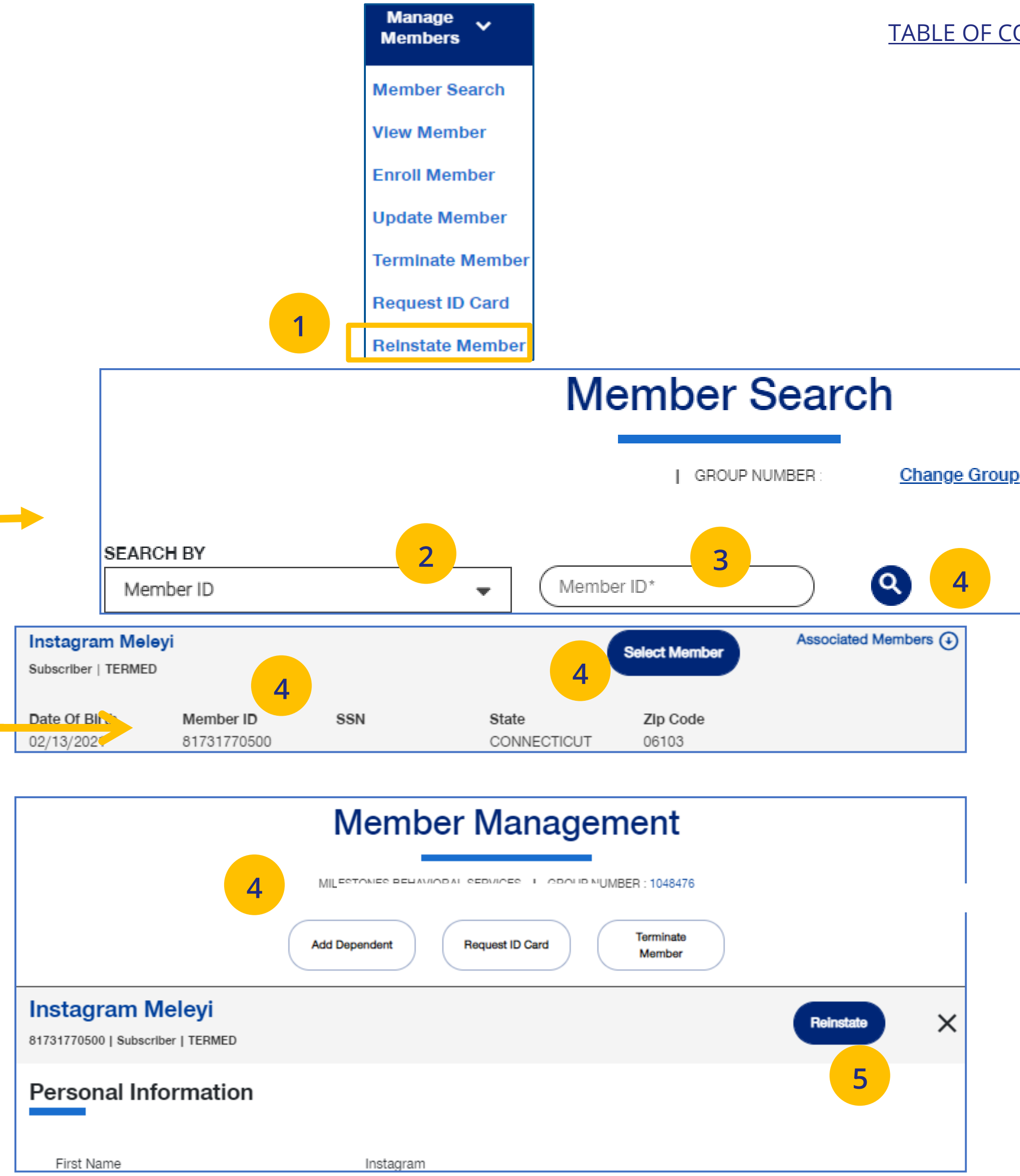
Reinstate Member is used to reinstate a member who were previously terminated. Reason can be for COBRA and non-COBRA reasons.

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.

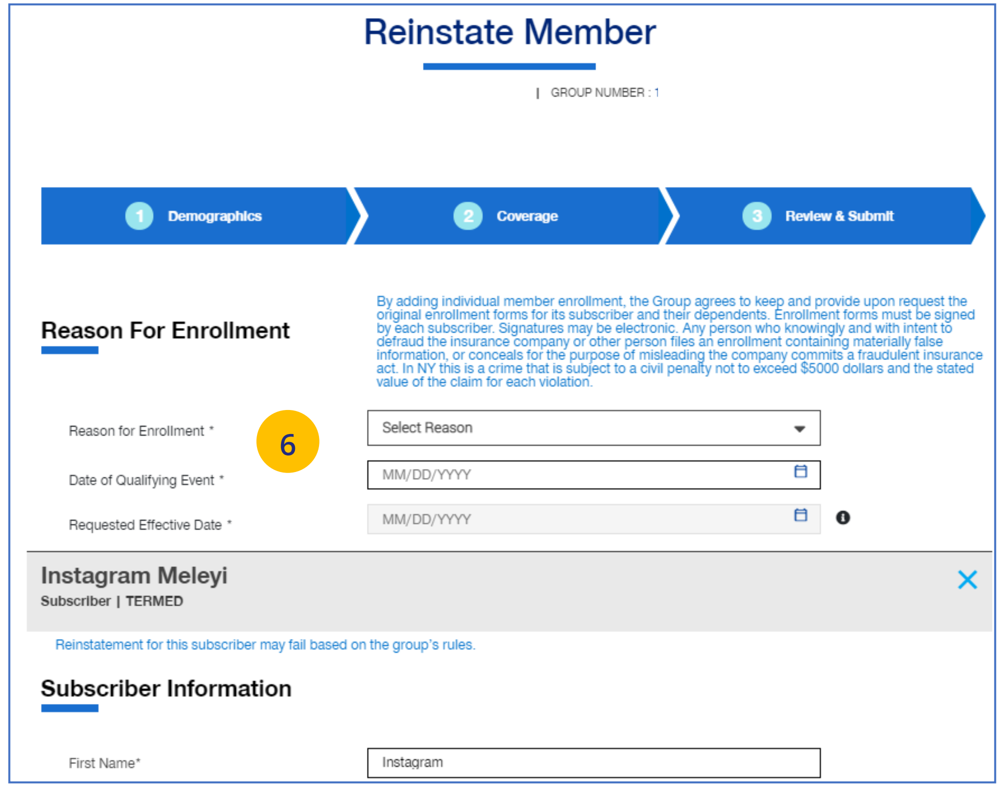


6. Update the needed information for the reinstatement in the **Demographics** sections: **Reason for Enrollment**, **Subscriber Information**, **Contact Information**, **Dependent** and **Contact Information**. You will have to scroll down to see all fields.

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

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

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

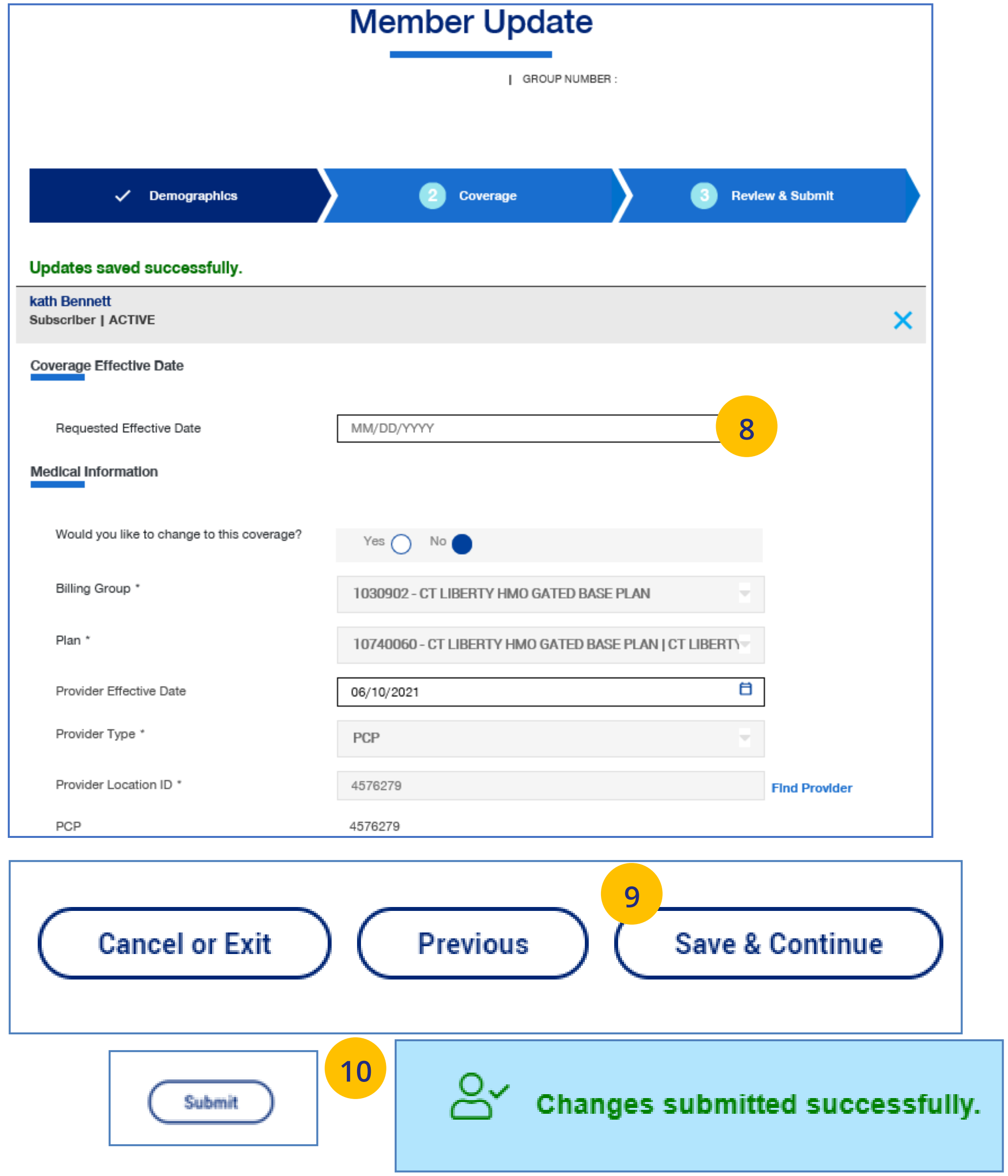


8. Update information in the **Coverage** section if needed. You will have to scroll to see all fields.
   Note: Billing Group – In Billing Group, you can narrow your search by typing in the first few letters or number in the billing group.

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



7 | Billing & Payment

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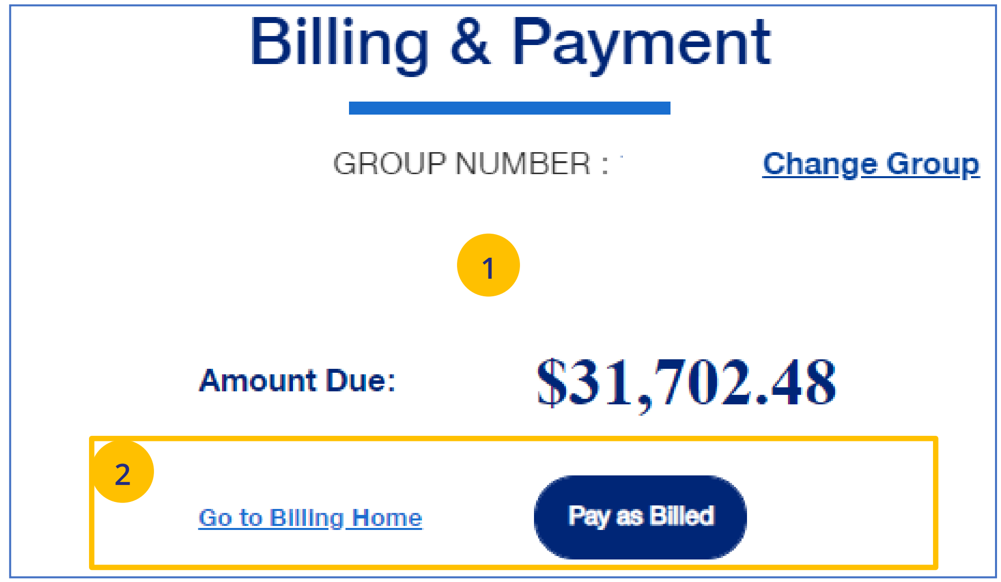
The **Billing & Payment** tab is used to (1) display billing and payment information related to a specific group, or (2) make a payment.

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.



7 | Billing & Payment: Pay as Billed

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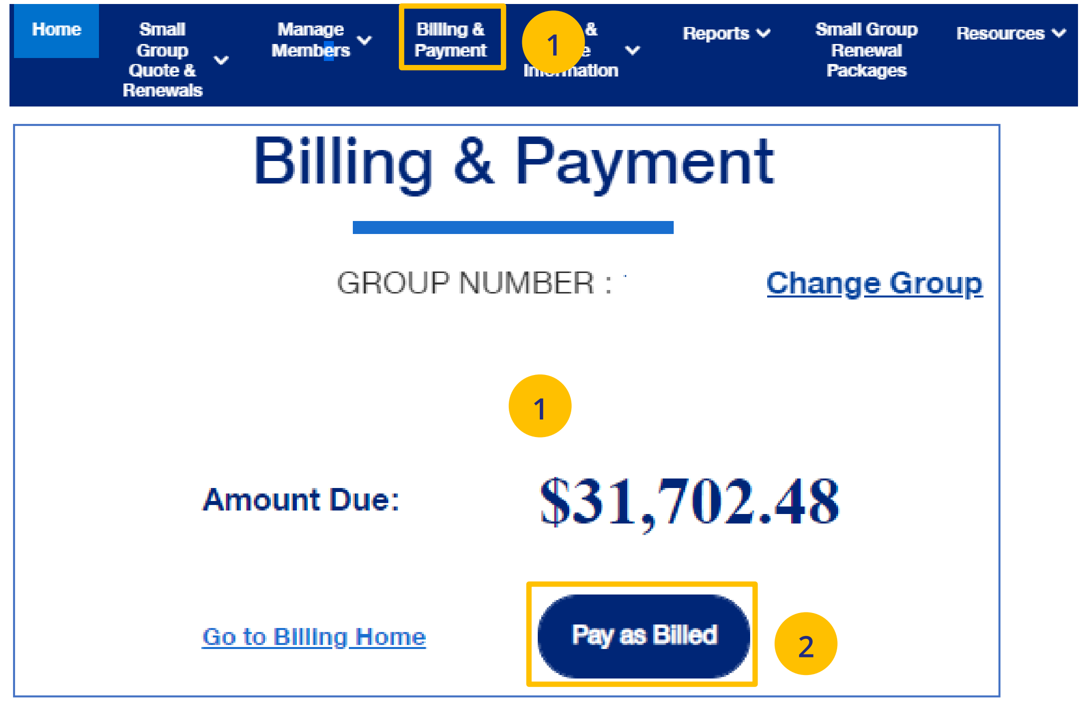
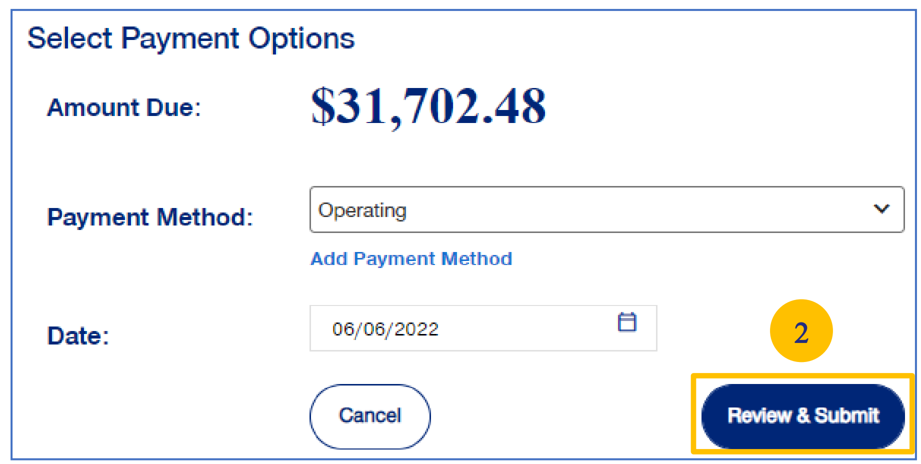
To pay a bill from the **Billing & Payment** tab, follow the steps below.

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

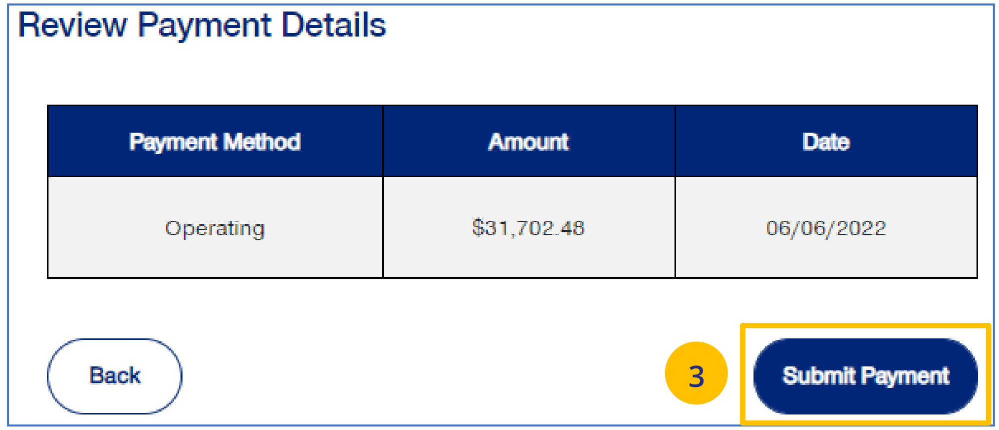


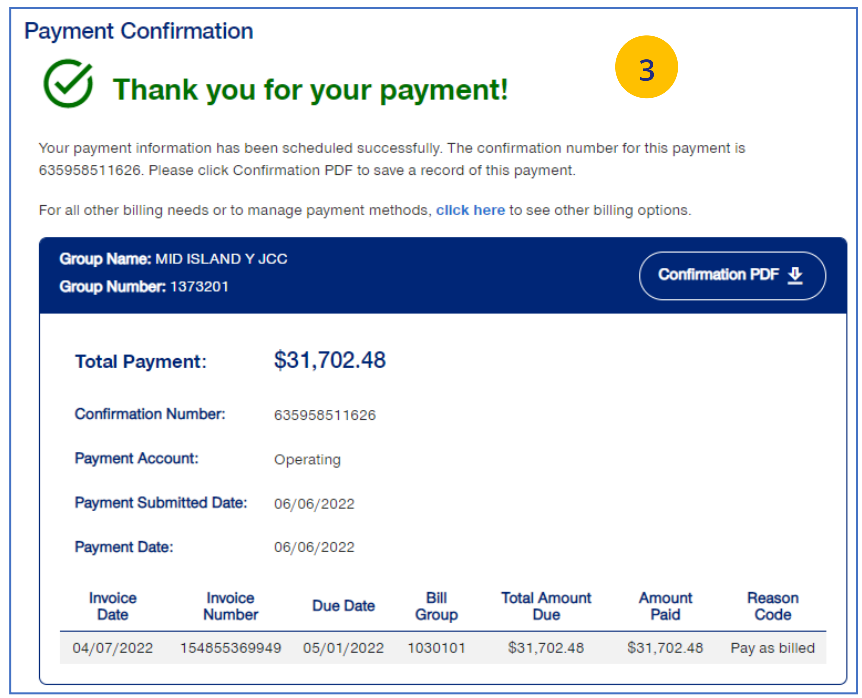


7 | Billing & Payment: Pay as Billed (continued)

3. Review the payment details and click **Submit Payment**. You will receive conformation on your payment.

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

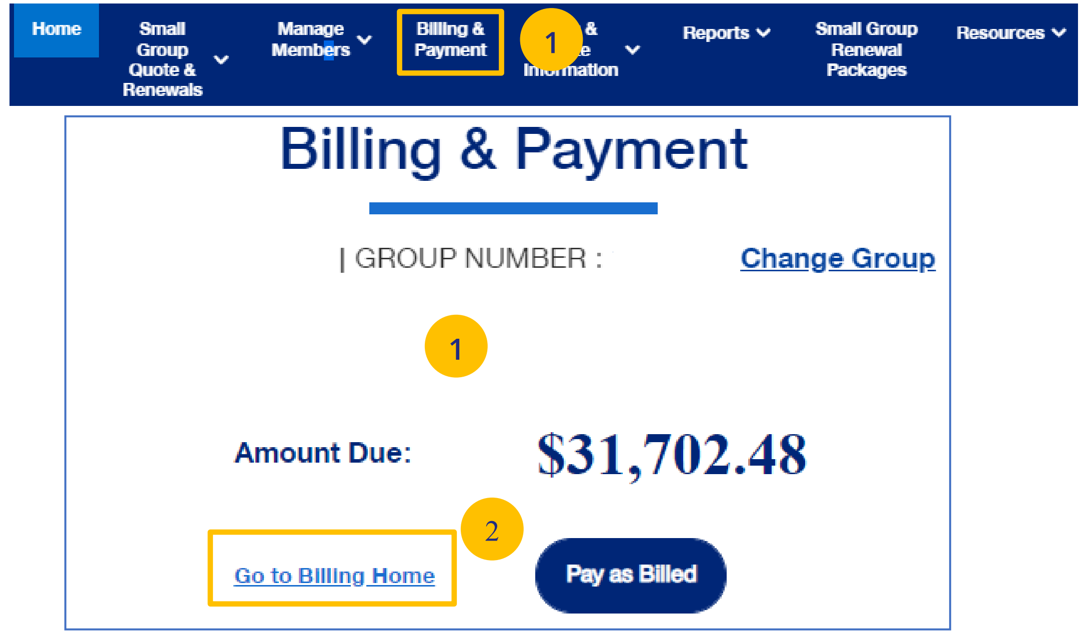


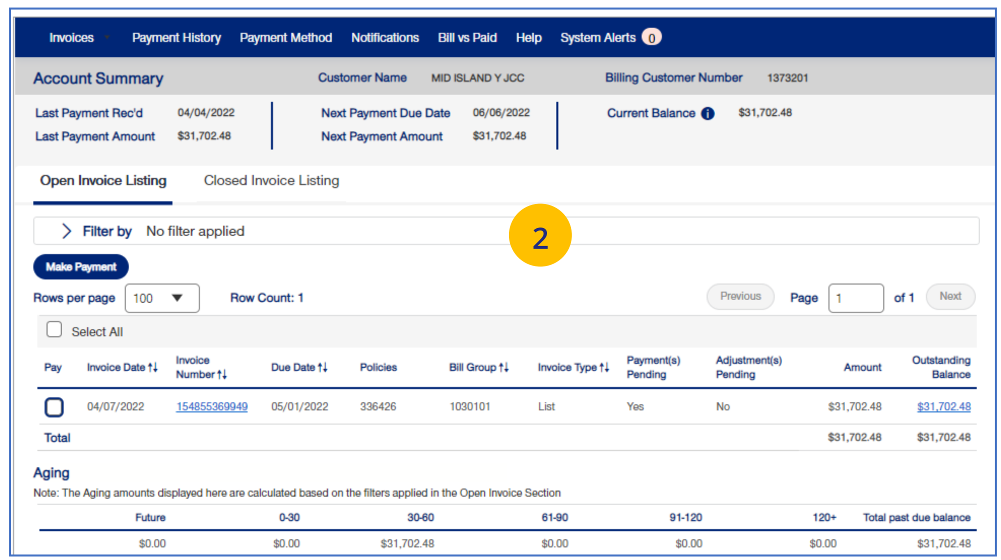


7 | Billing & Payment: Go to Billing Home

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

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





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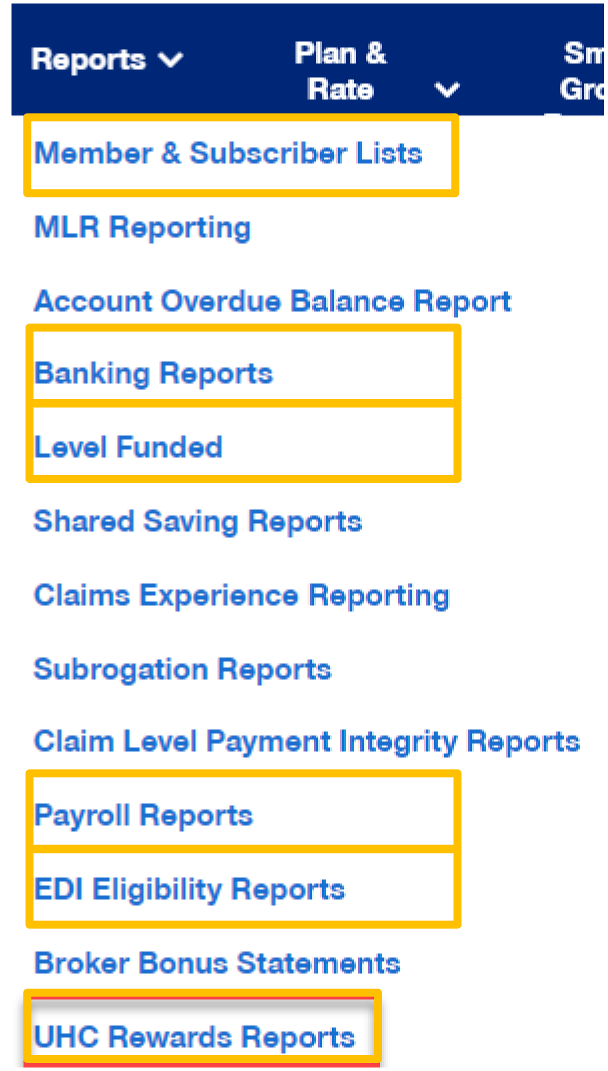
8 | Reports

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

- **Member & Subscriber Lists** that show all members affiliated with the Group.
- **Banking Reports** that show daily, monthly and historical banking reports for the Group.
- **Level Funded** shows the Monthly Executive Summary, the IRS Documents 6055 and IRS documents 1095 B reports.
- **EDI Eligibility Reports** that show shows how many transactions were on the file and their status (successful, errored, warnings).
- **Payroll Reports** are used for on-demand plan designs to track premiums and payroll deductions at a subscriber level.
- **UHC Rewards Reports -** Redemption report generated quarterly for customers with members that have redeemed an earned incentive. This report can assist with tax reporting. Report is available one week after the quarter ends.

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



8 | Member & Subscriber Lists

To generate the Member or Subscriber List:

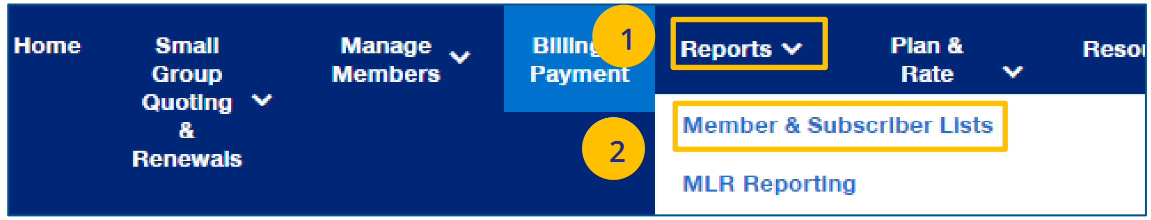
1. Click the **Reports** tab.
2. Select **Member & Subscriber Lists**. The **Member & Subscriber Lists** screen is shown.

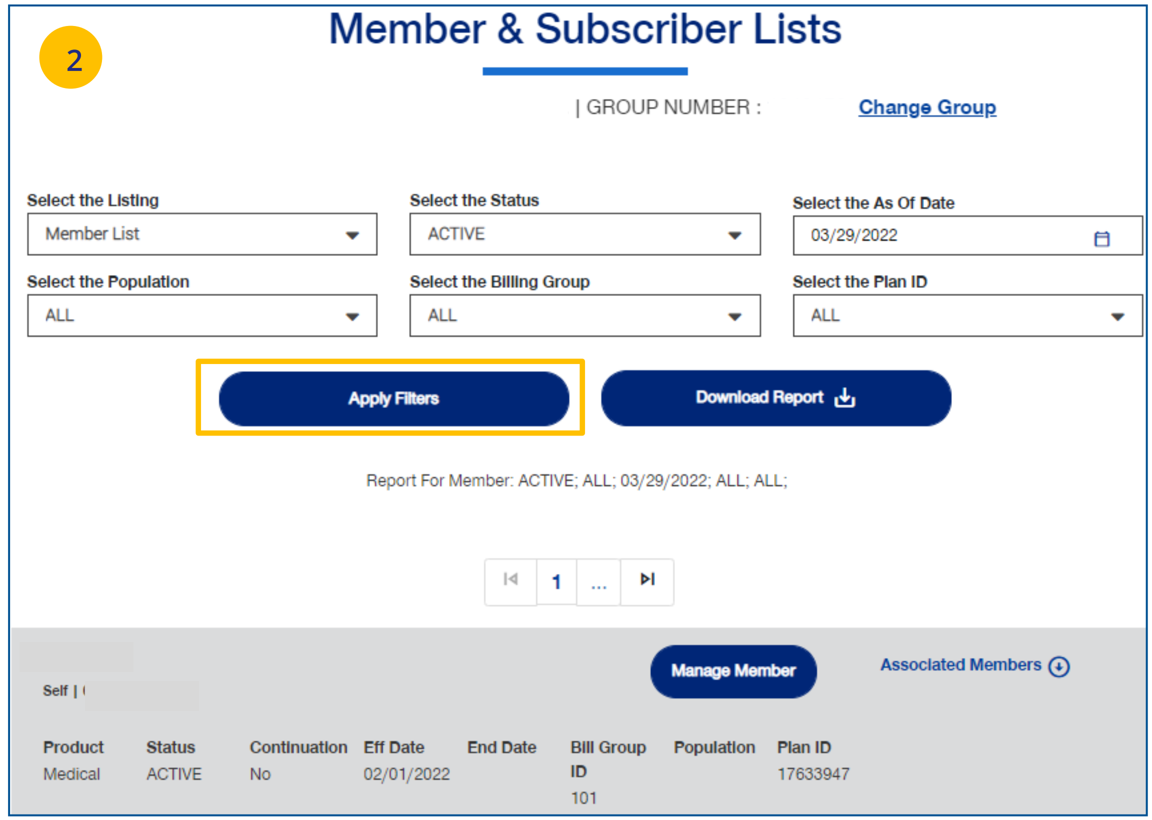
   Note: Member List is the default and the default report will be shown when the screen displays. Just scroll down to view members in the report who met the default search criteria.

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

   To Change the Search Criteria: Use the dropdowns in each field to enter the needed information. Fields include:
   - Member List or Subscriber List
   - Status (All Including Complete, All Excluding Complete, Active, Pending, Termed, Incomplete)
   - As of Date
   - Population
   - Billing Group
   - Plan ID

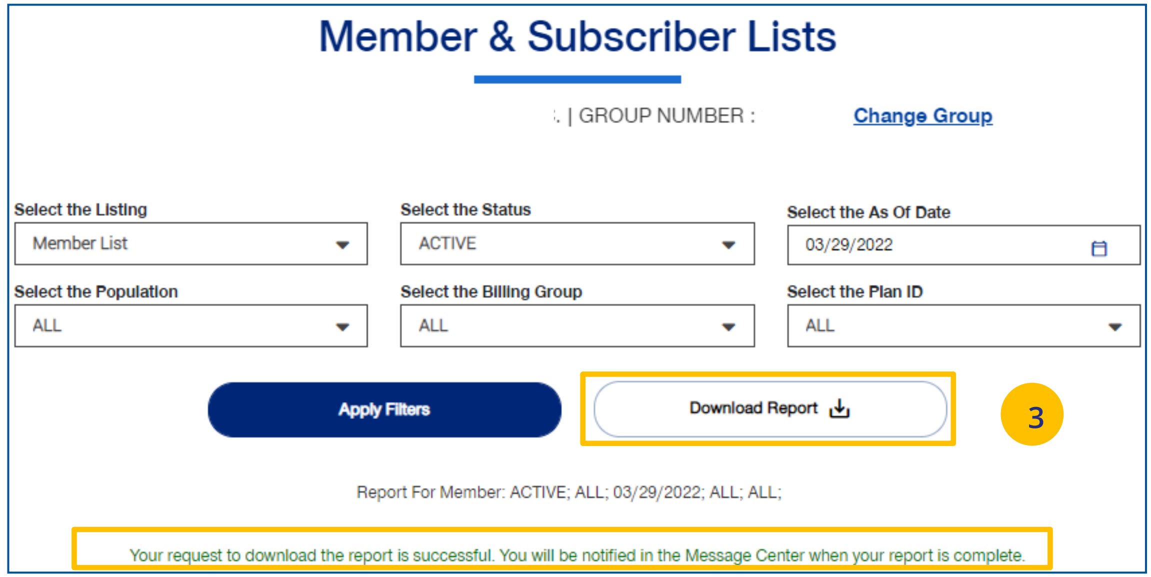
   After selecting your search criteria, click **Apply Filters**. Scroll down to view the members or subscribers that met your search criteria.





To generate the Member or Subscriber List:

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



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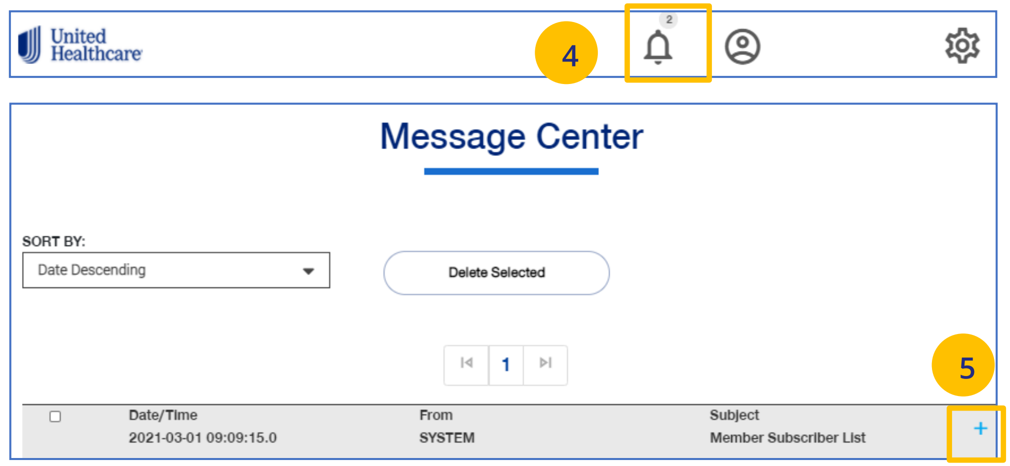
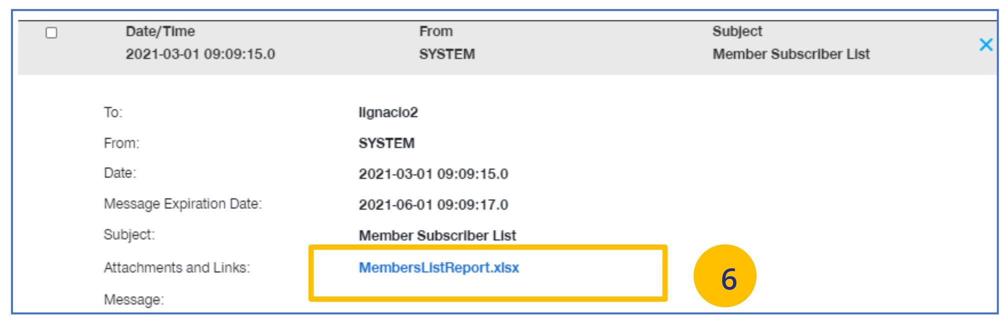
8 | Member & Subscriber Lists (continued)

4. Click on the bell icon to open message center.
5. Click on the plus sign.
6. Click on the attachment link to display the report.





8 | Banking Reports

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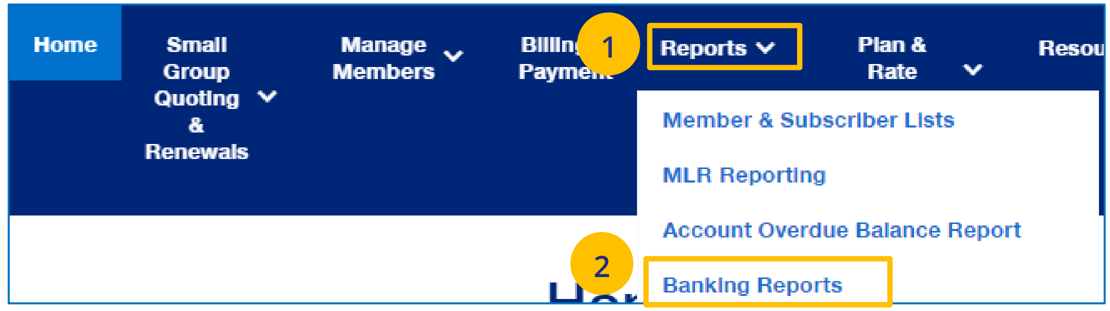
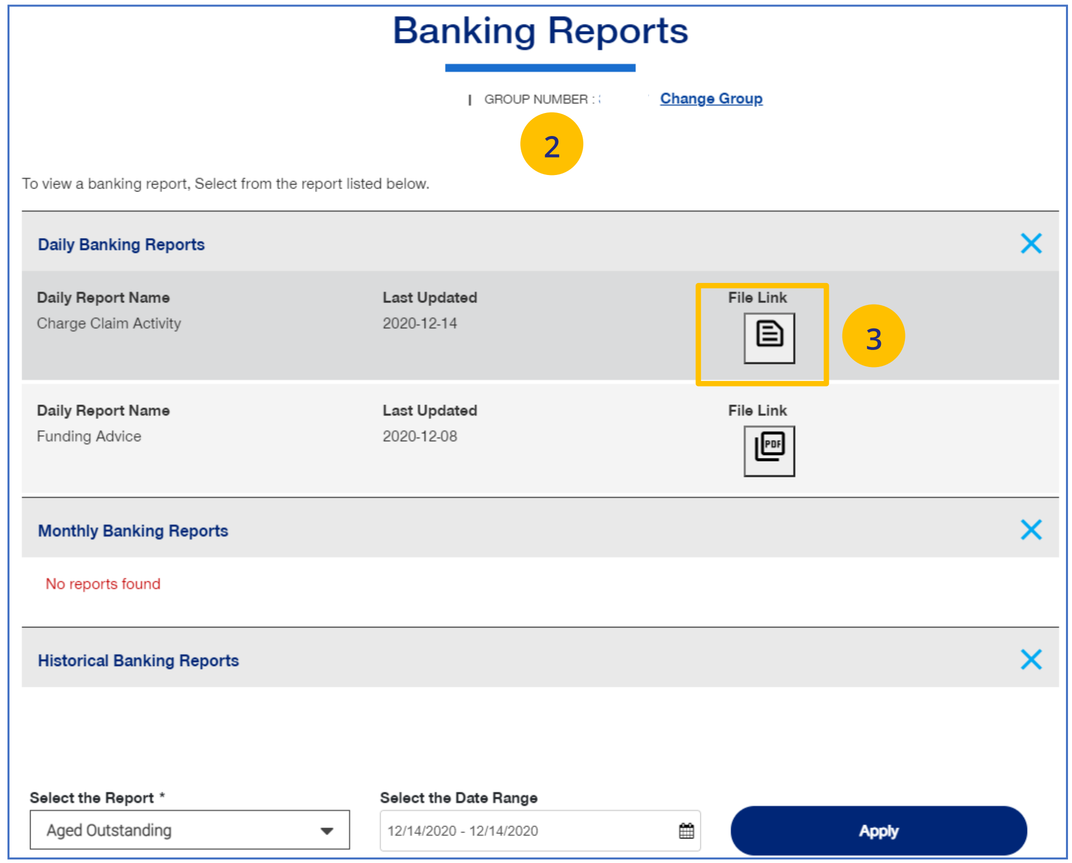
The **Banking Reports** tab allows you to generate the daily, monthly and historical banking reports for a specific Group.

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. Click the **Banking Reports** tab. 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.





8 | Banking Reports (continued)

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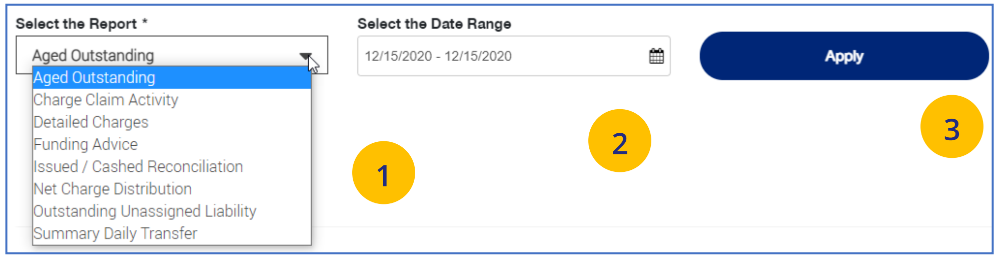
Selecting Other Reports

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.



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. *The aged items are reported to the customer to include in their unclaimed property filing/escheatment process*	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

8 | Level Funded

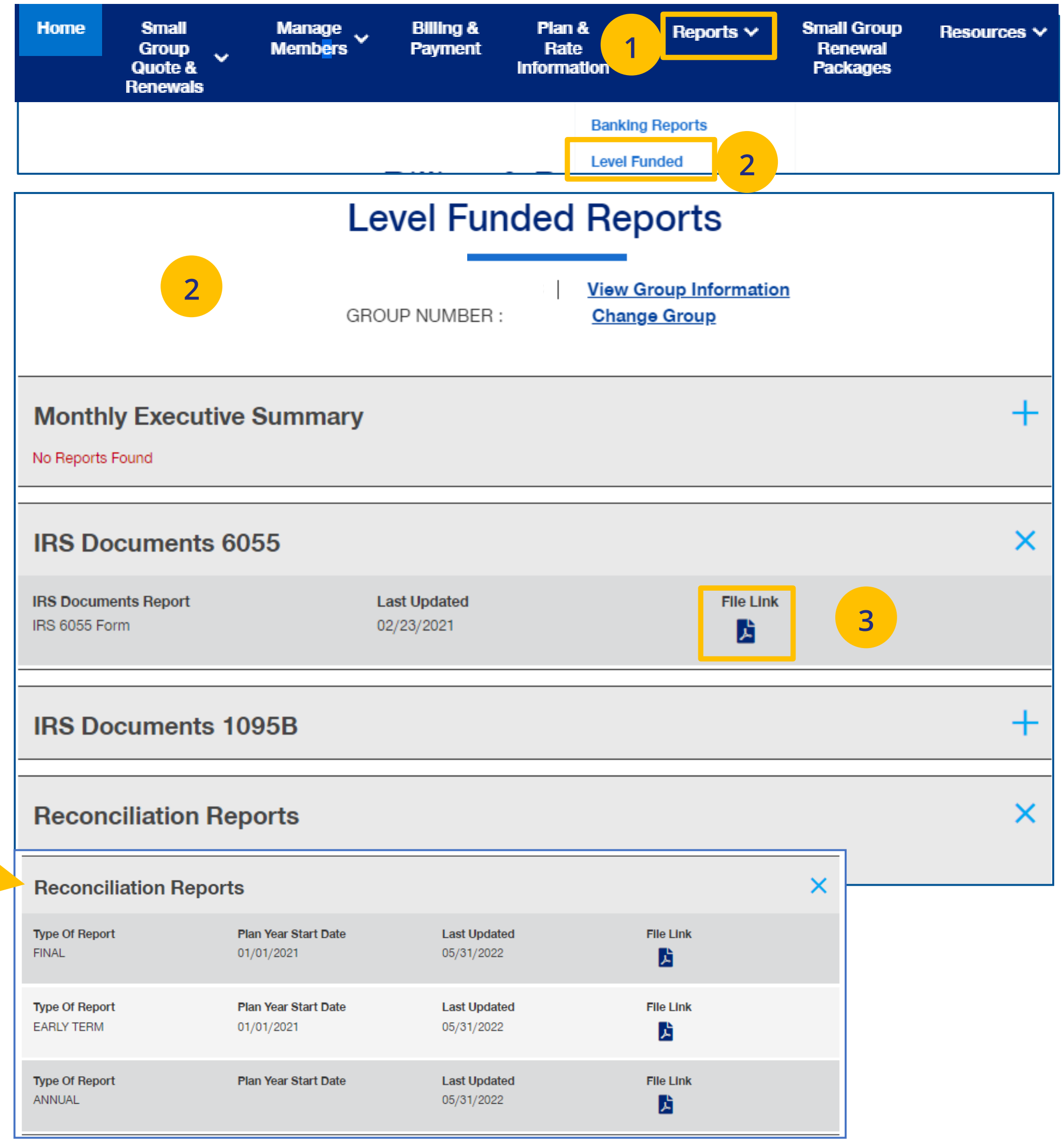
The **Level Funded** reports show the Monthly Executive Summary, the IRS Documents 6055 and IRS documents 1095 B reports and Reconciliation reports.

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 – Includes **Early Term**, **Annual** and **Final** reports

   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.



8 | EDI Eligibility Reports

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

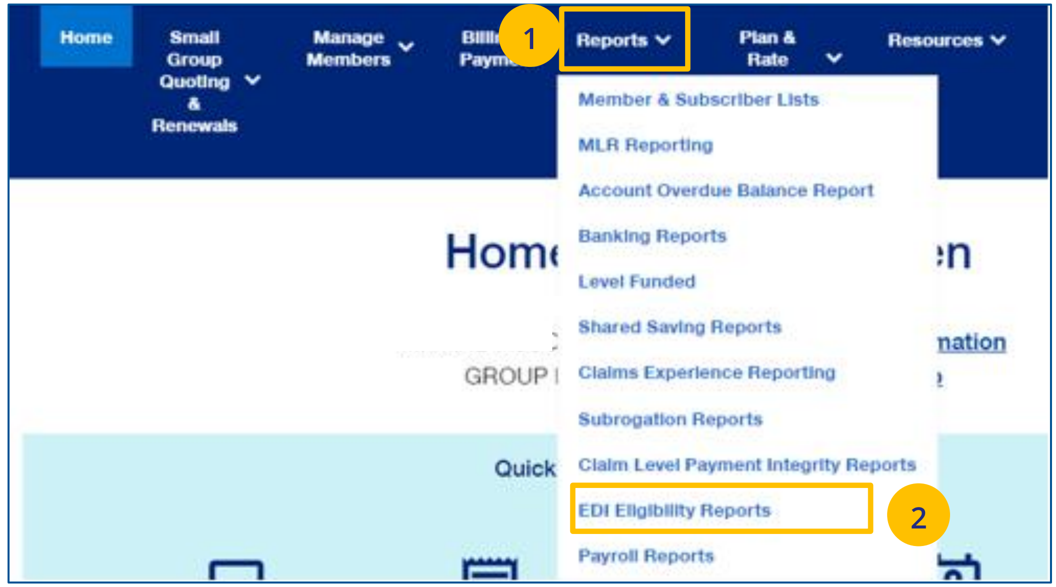
1. Click the **Reports** tab.
2. Select **EDI Eligibility Reports**. The **EDI Eligibility Reports** window displays with reports that fall within the default time period.

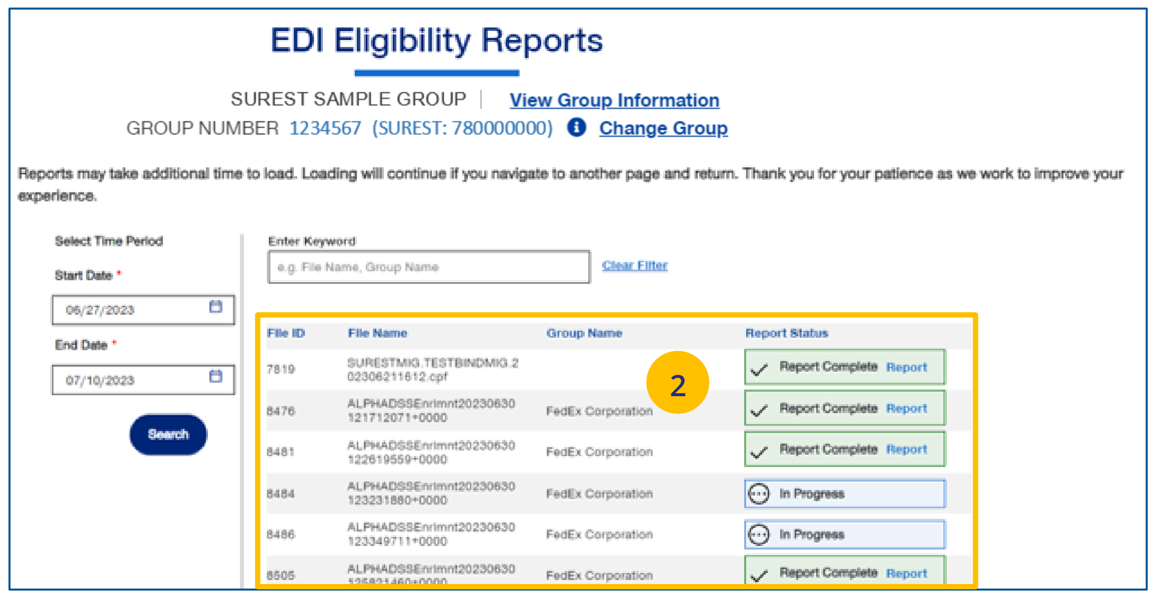
   Each report will show a **File ID**, **File Name**, **Group Name** and **Report Status**.

   An **In Progress** message displays in the **Report Status** field if the report has not finished loading. The **Report Complete** status indicates the report is ready to be viewed. A **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 widow and are limited to the previous six months. **Keyword** searches will show results as you enter the word.





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

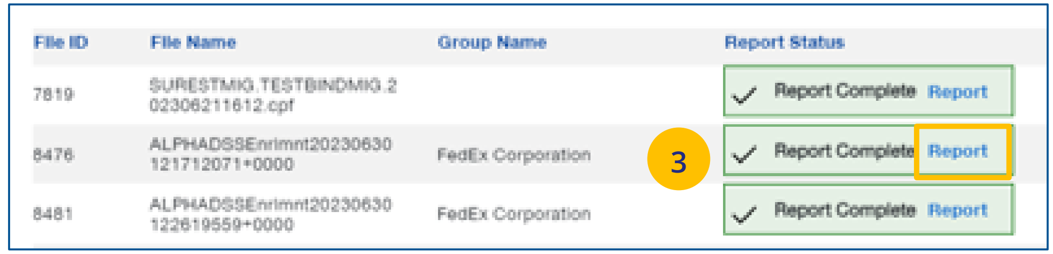
   Below is a description of the sections of the report:

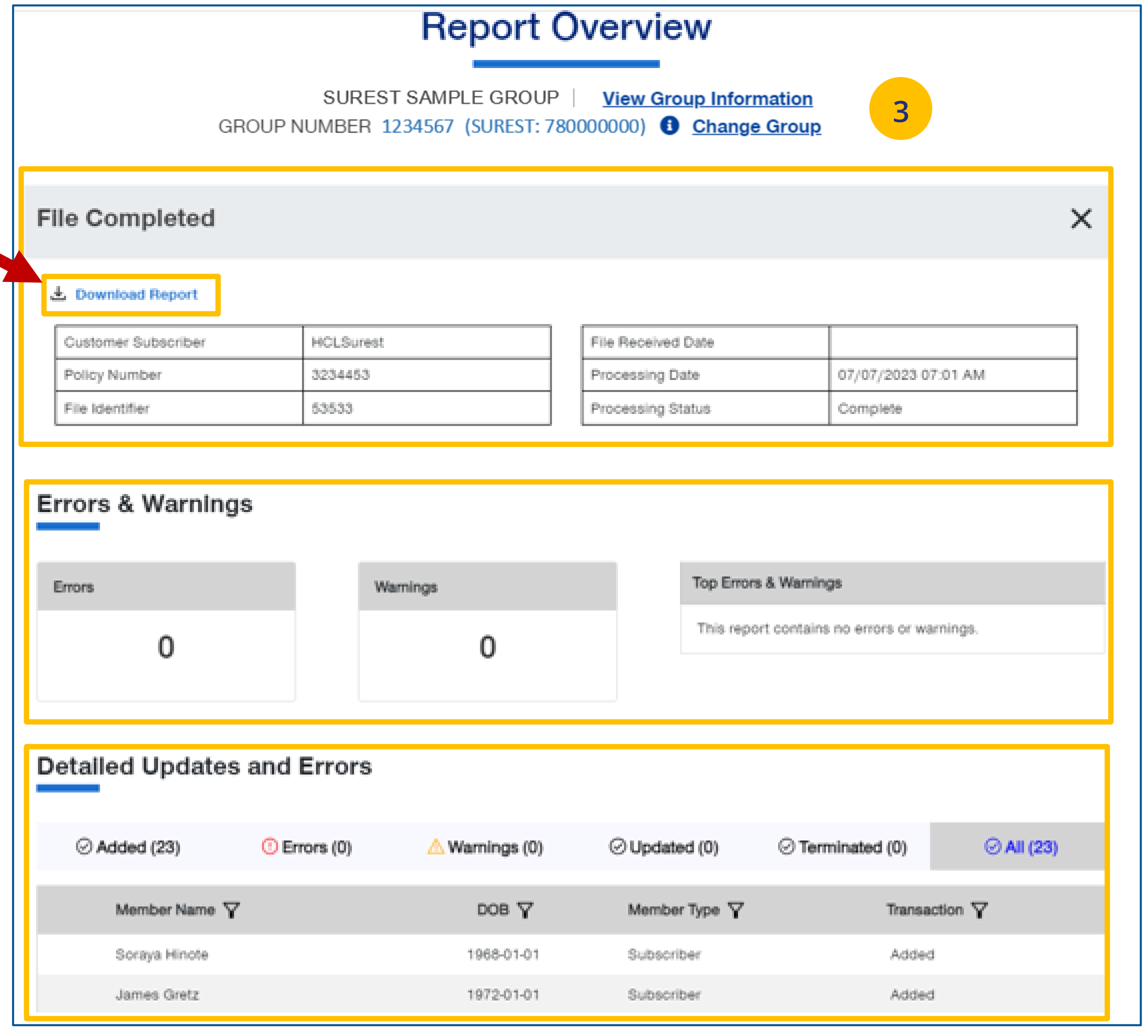
   File Completed – Group details, including when the file was received, processed and the status.

   - **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.





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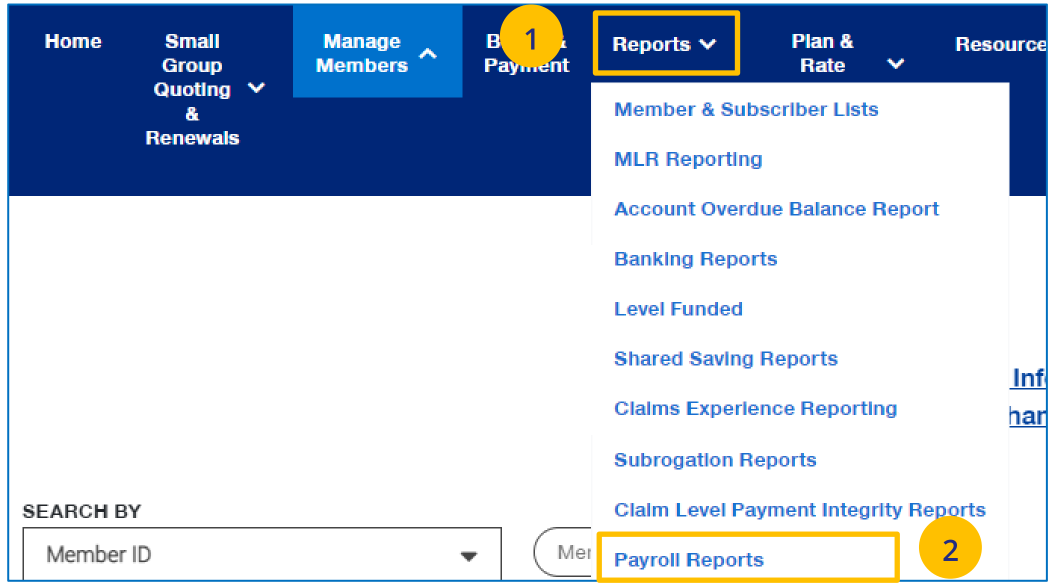
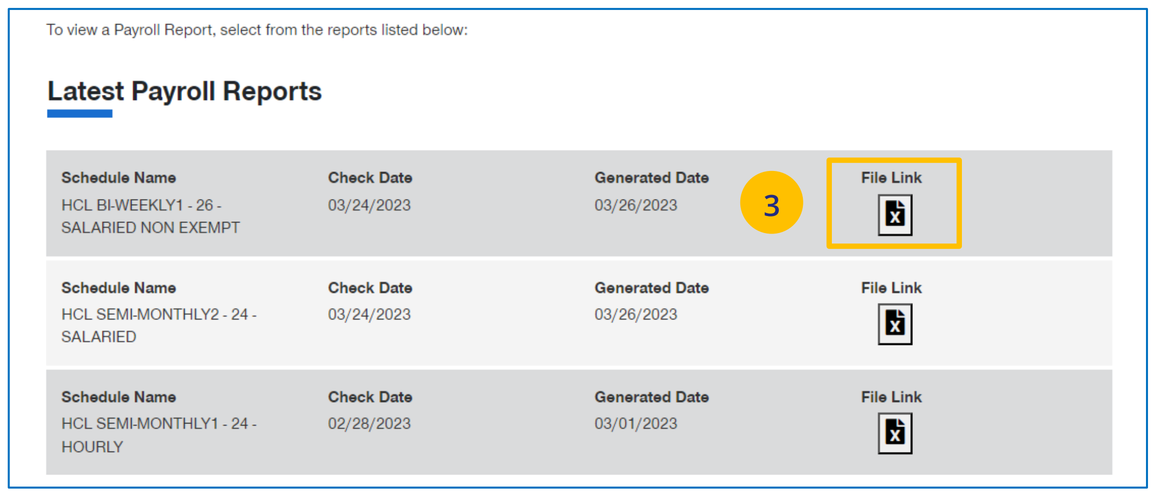
8 | Payroll Reports

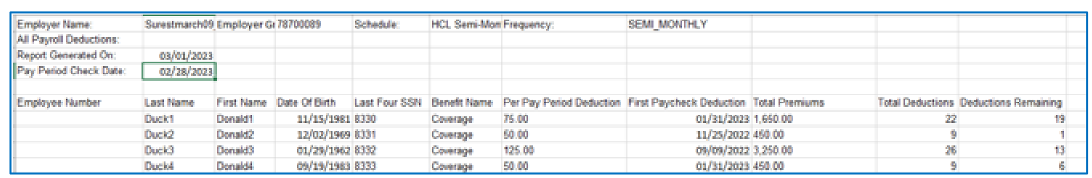
The **Payroll Reports** show detailed data for specific check dates, providing a high-level overview of all payments.

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.







Employer Name:	Surestmarch09	Employer Gr	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

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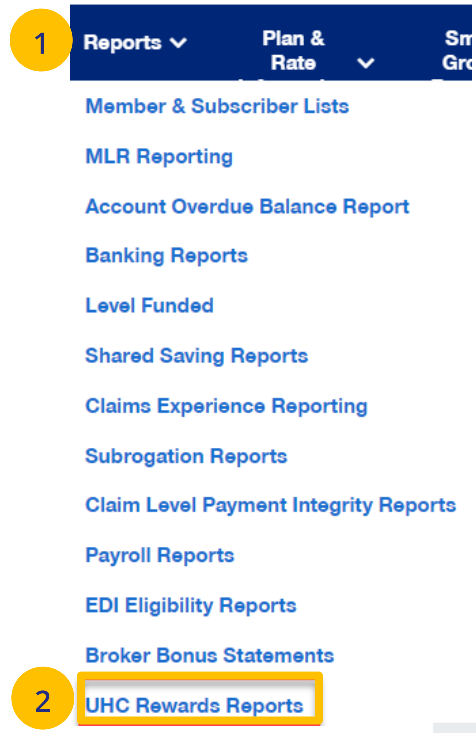
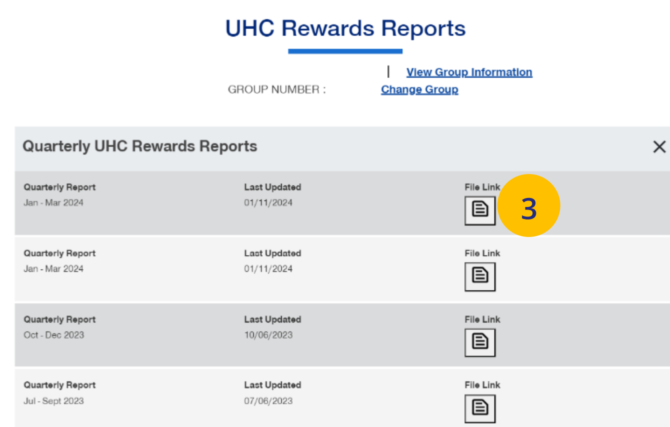
8 | UHC Rewards Reports

The **UHC Rewards Reports** - Redemption report generated quarterly for customers with members that have redeemed an earned incentive.

1. Click the **Reports** tab.
2. Select **UHC Reward Reports**.
3. Click the specific **File Link** to view the report you need.

This report can assist with tax reporting. Report is available one week after the quarter ends.





9 | 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

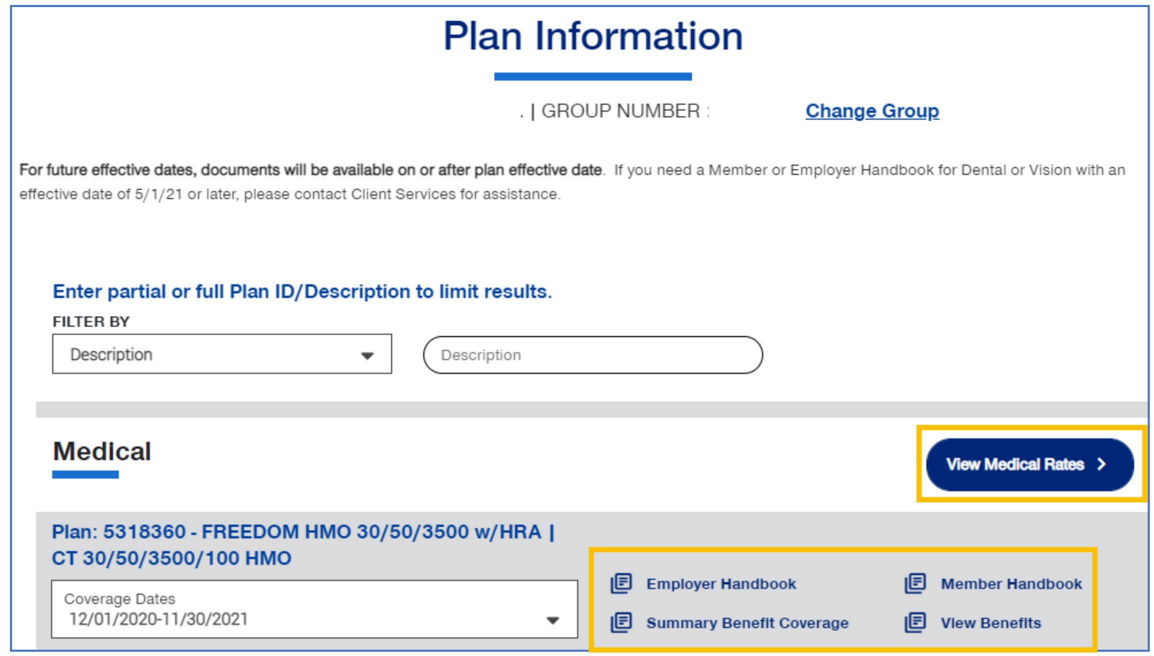
Note: Plan documents that are displayed and available for access will be based on the products the group purchases.

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



9 | Plan & Rate Information

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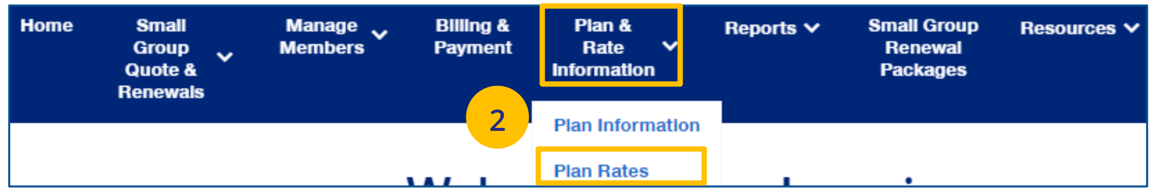
To View Medical, Vision and Dental Rates:

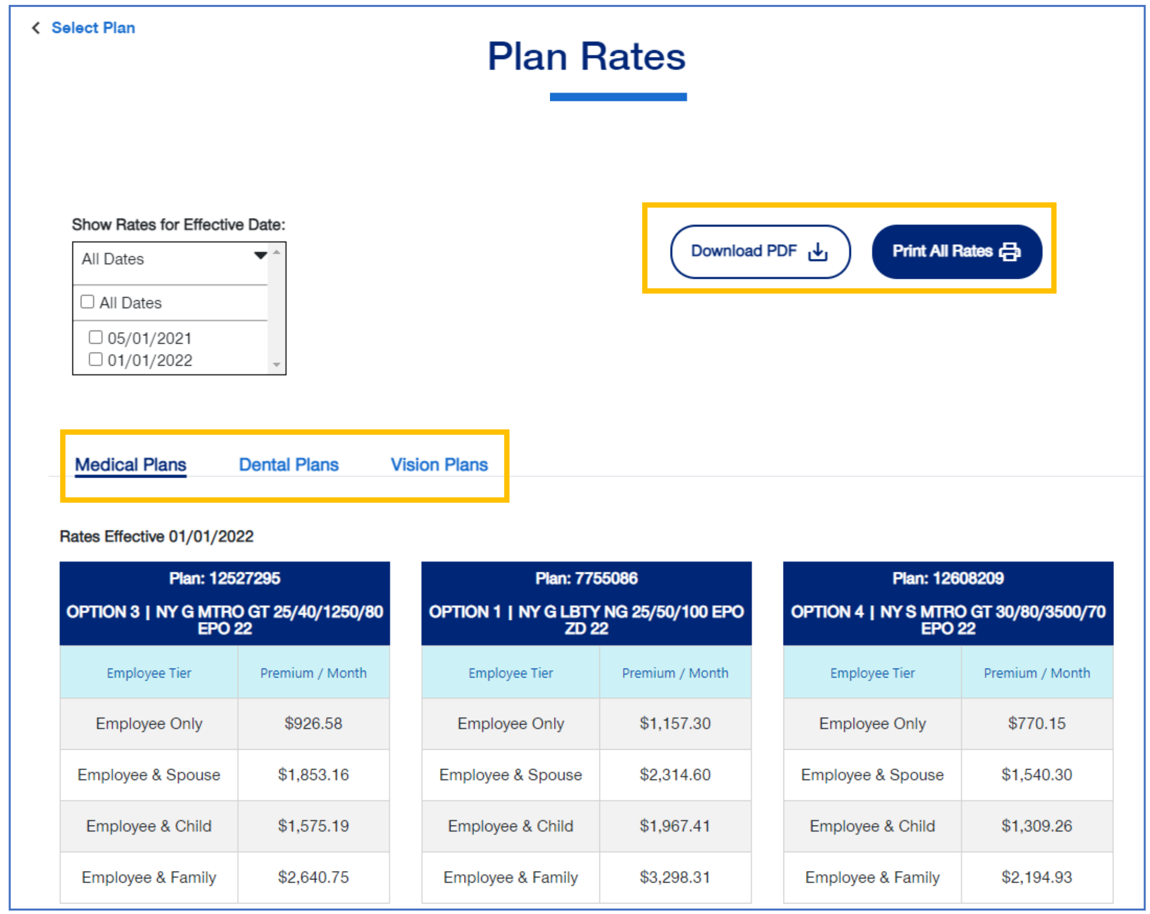
4. Click the **Plan & Rate Information** tab.
5. Click **Plan Rates.** The **Plan Rates** screen will be shown.

   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.

   Note: Plan Rates are not available for Grandfathered or Transitional Relief Groups





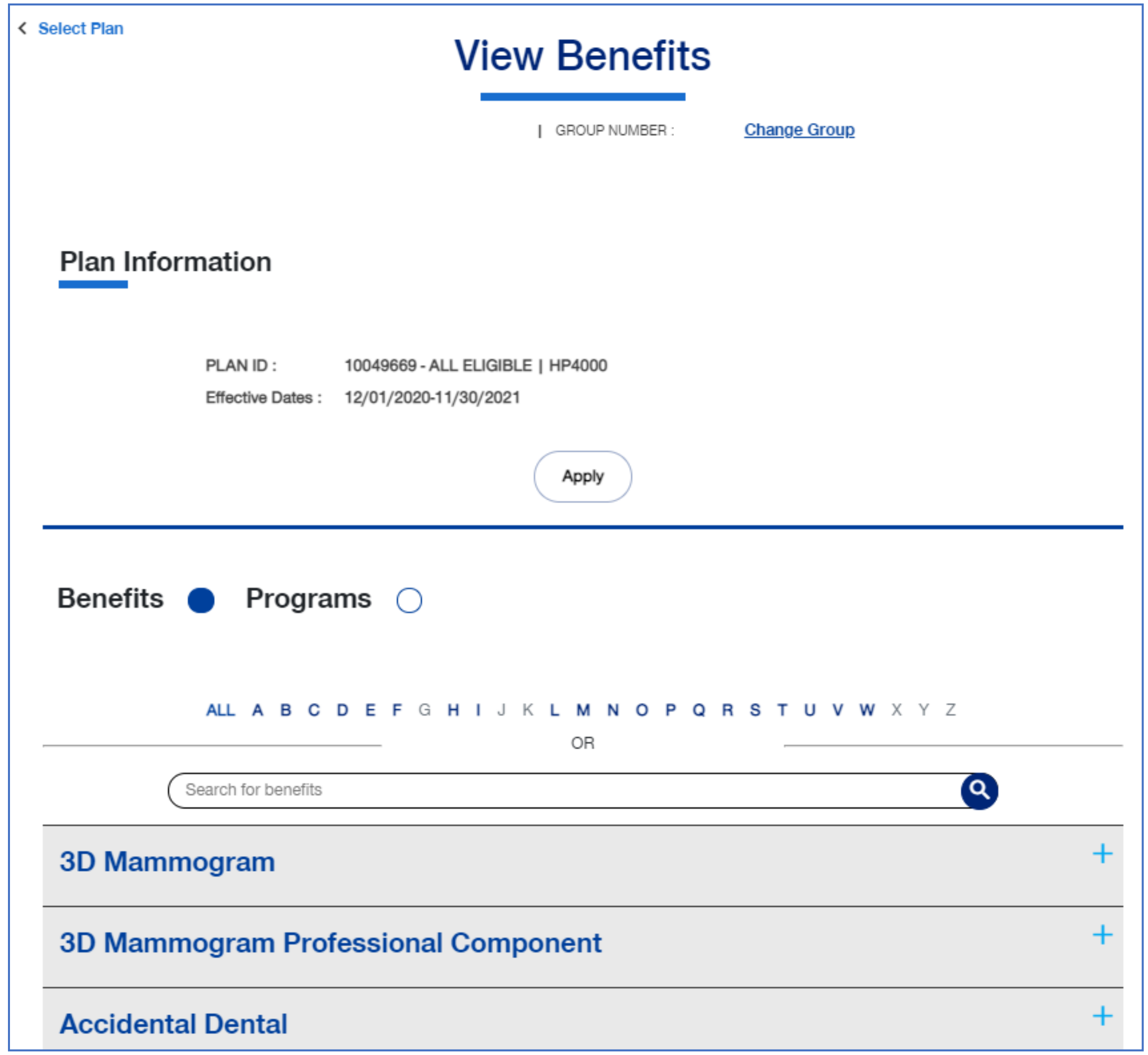
9 | View Benefits

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

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

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

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



9 | Summary Benefit Coverage

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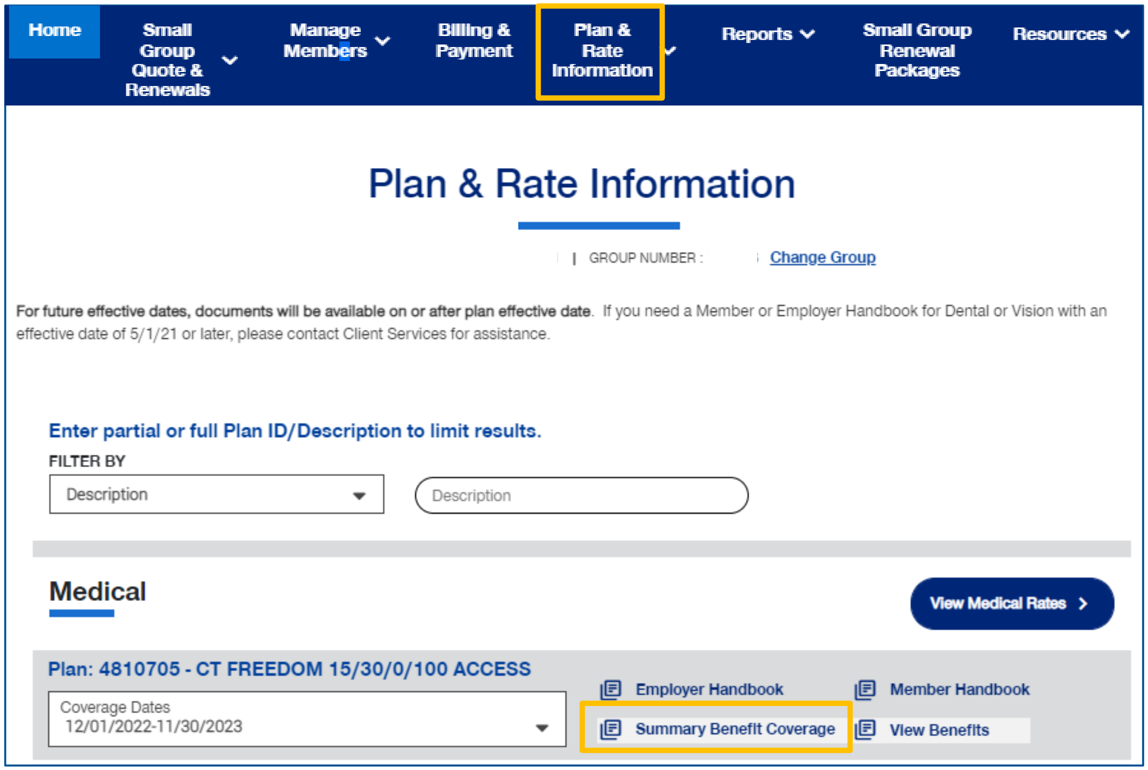
The **Summary Benefits Coverage** link allows you to view the **Summary of Benefits and Coverage** for each plan.

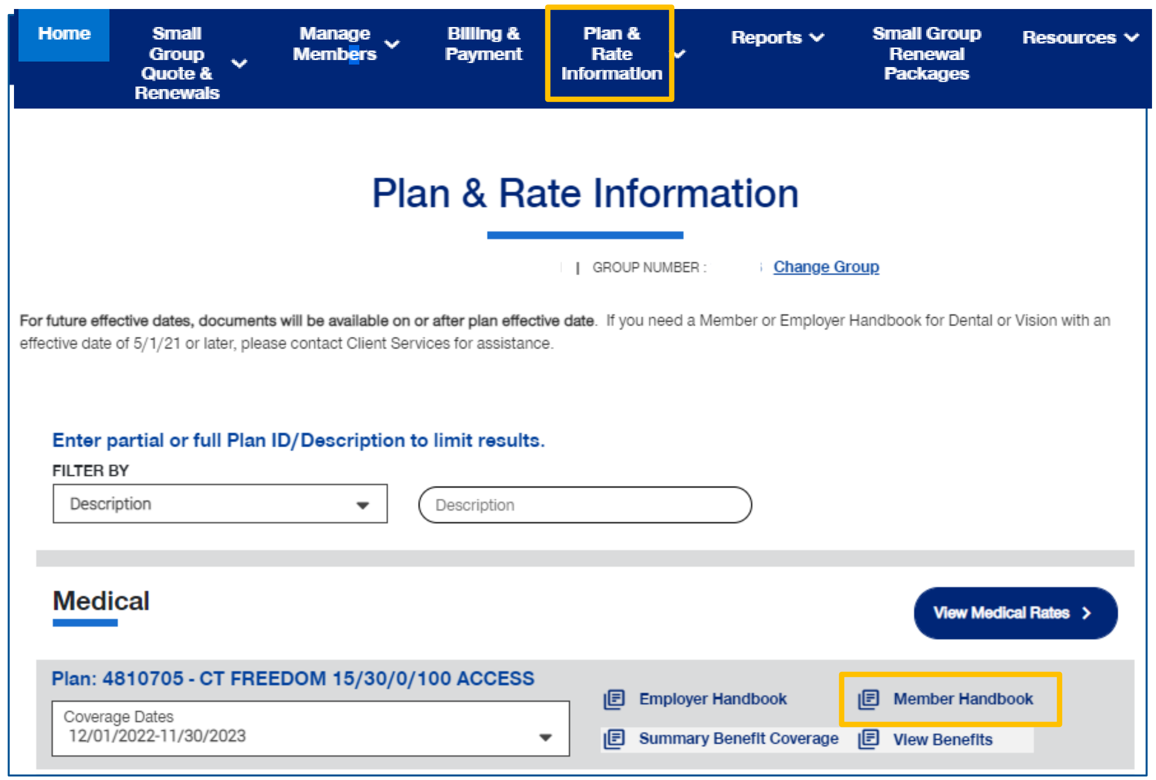
You can filter the report to show only specific plans or all plans.



9 | 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.



9 | Employer Handbook

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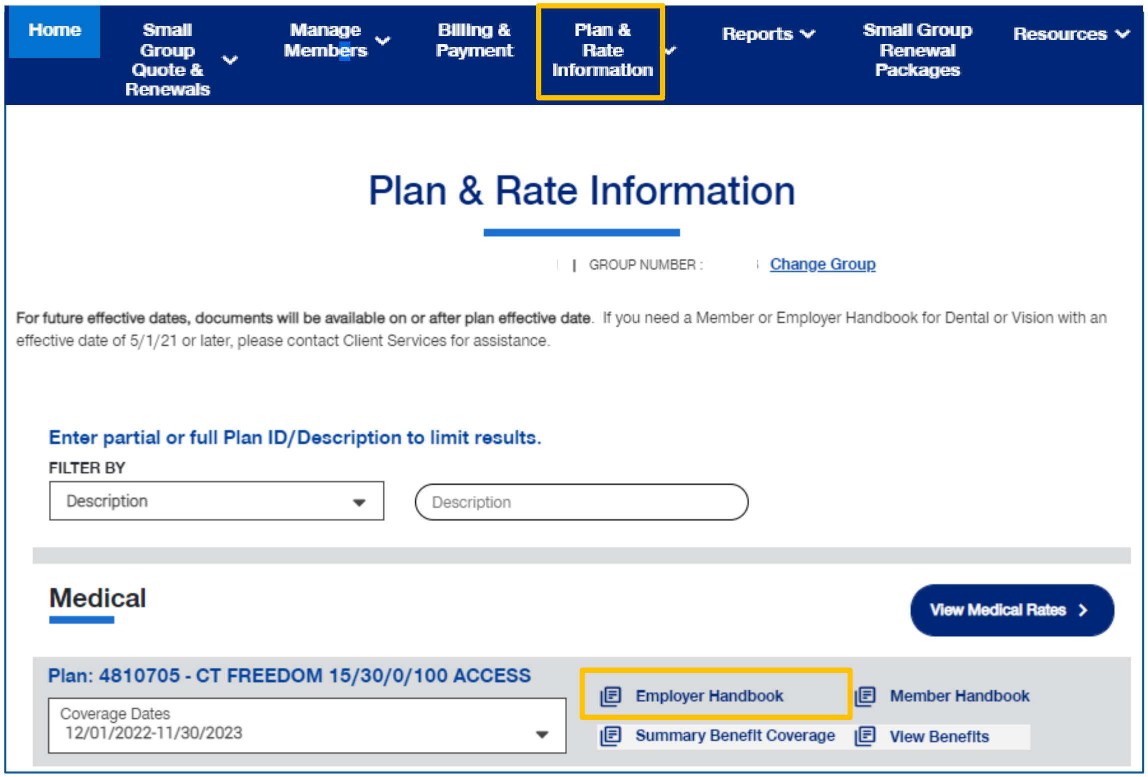
The **Employer Handbook** link allows you to view the Employer Handbook for each plan. You can filter the report to show only specific plans or all plans.



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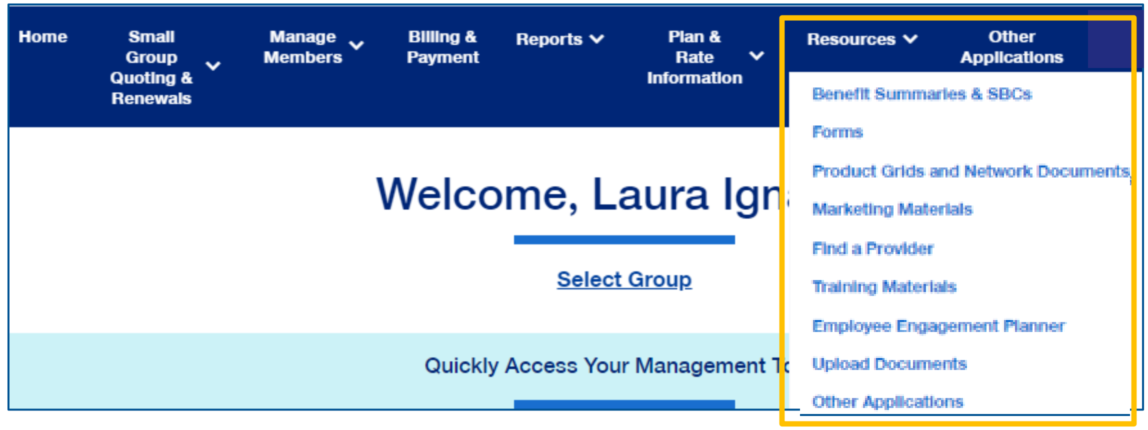
The **Resources** tab provides access to the following:

- **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
- **Other Applications -** Provides direct links to Employer eServices (EeS) or United eServices (UeS). This allows easy navigation between websites for those clients that need to manage separate policies.

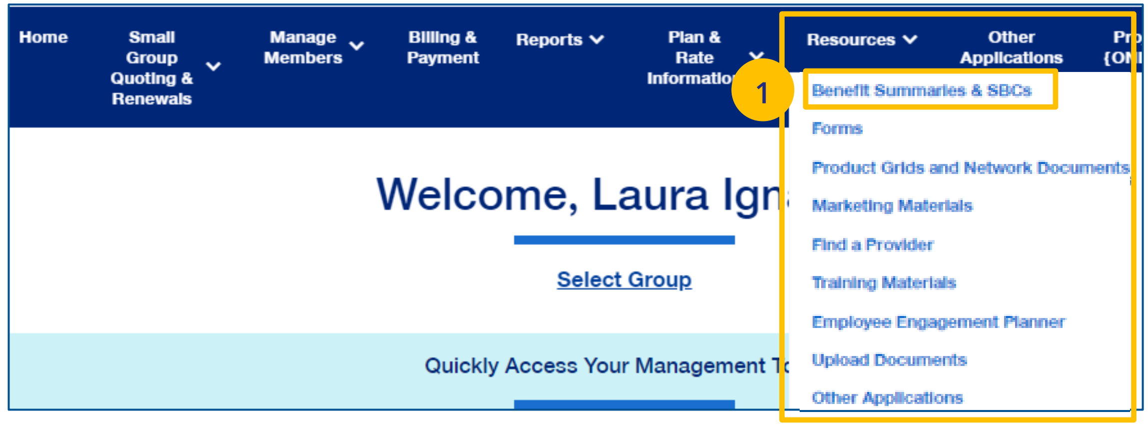


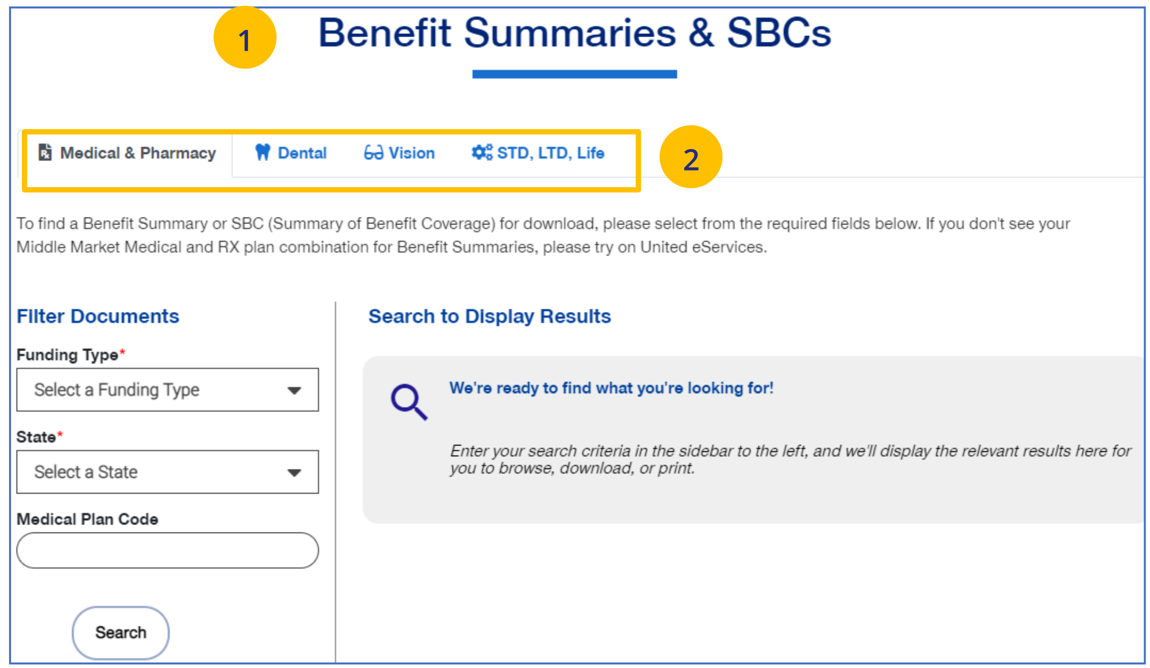
10 | Benefit Summaries & SBCs

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.





10 | Benefit Summaries & SBCs (continued)

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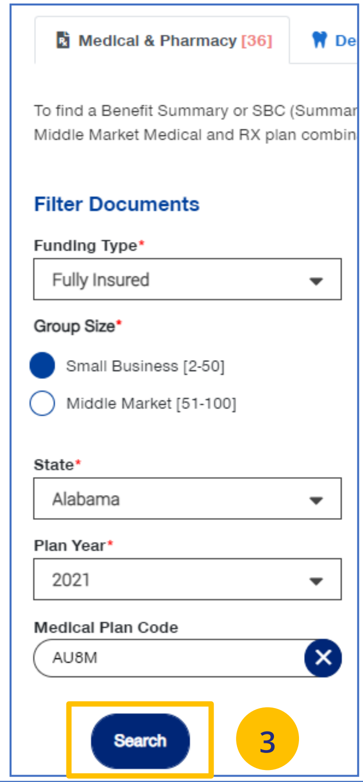
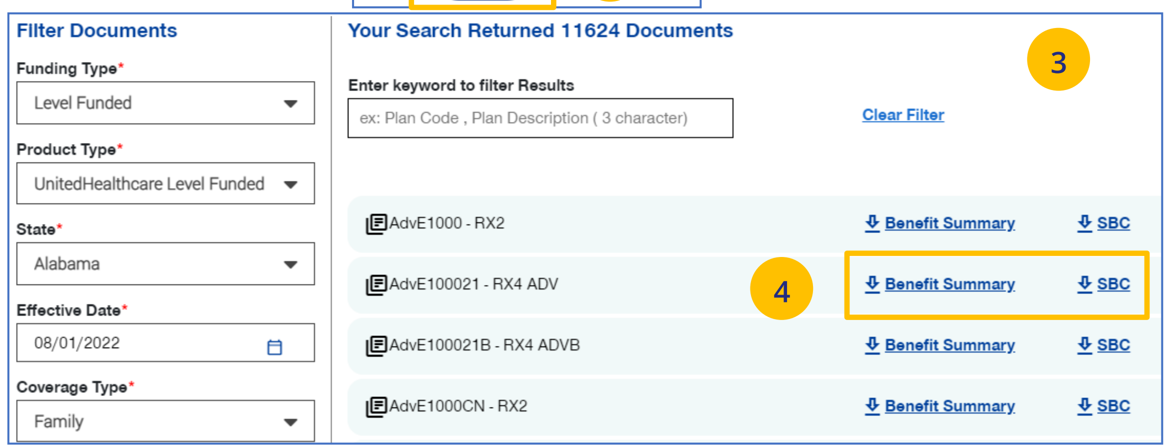
3. Click **Search**. The search results will return in the window.

4. Click the specific link to download the document you need.



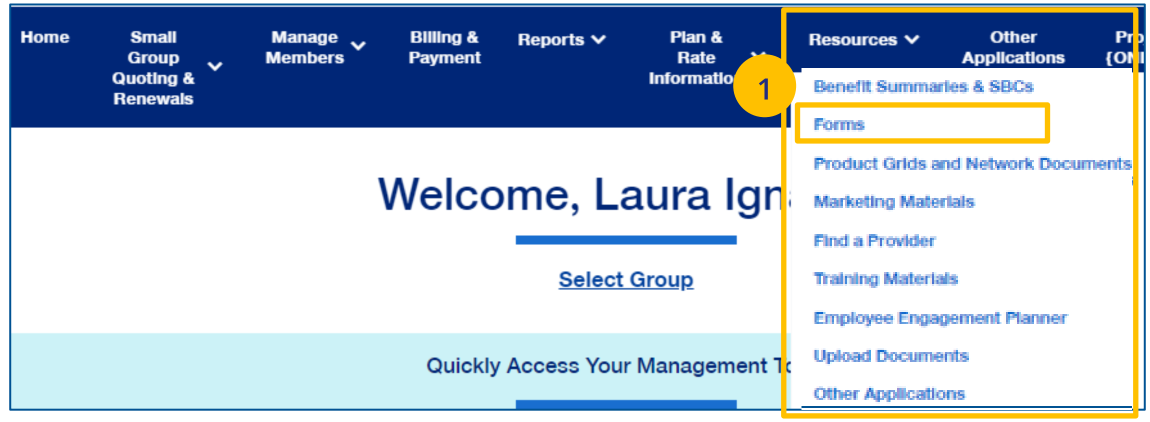


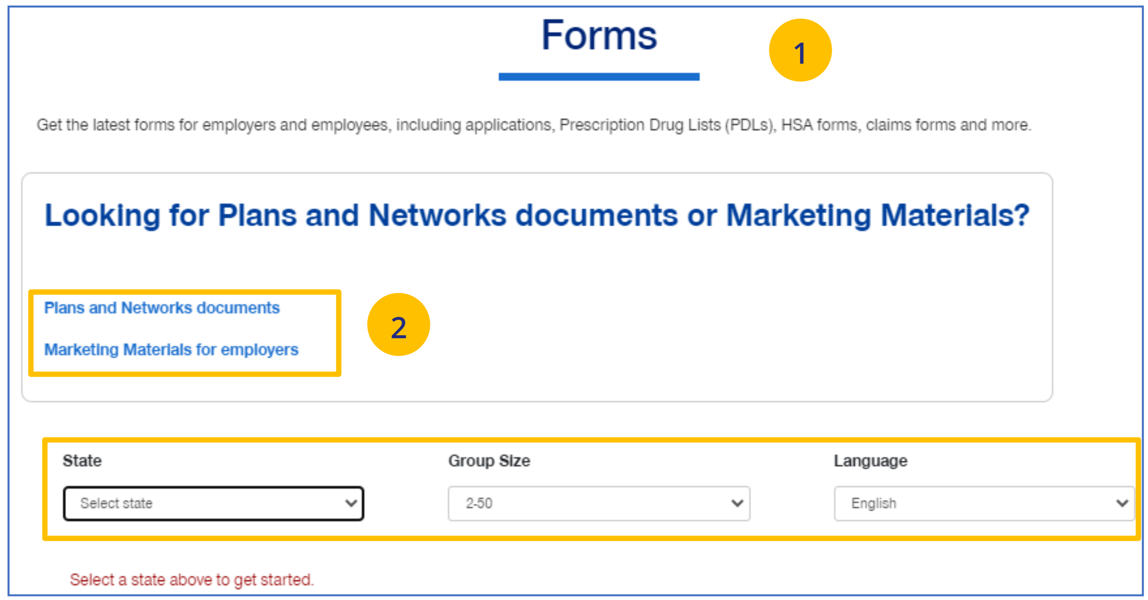
10 | Forms

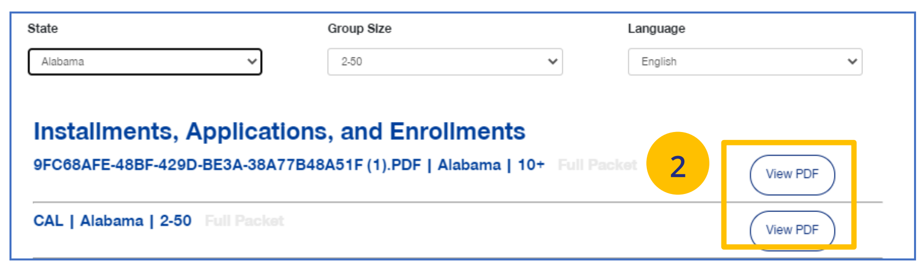
The **Forms** link provides access to forms for employers and employees, including applications, prescription drug lists, HSA forms and claim forms

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

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







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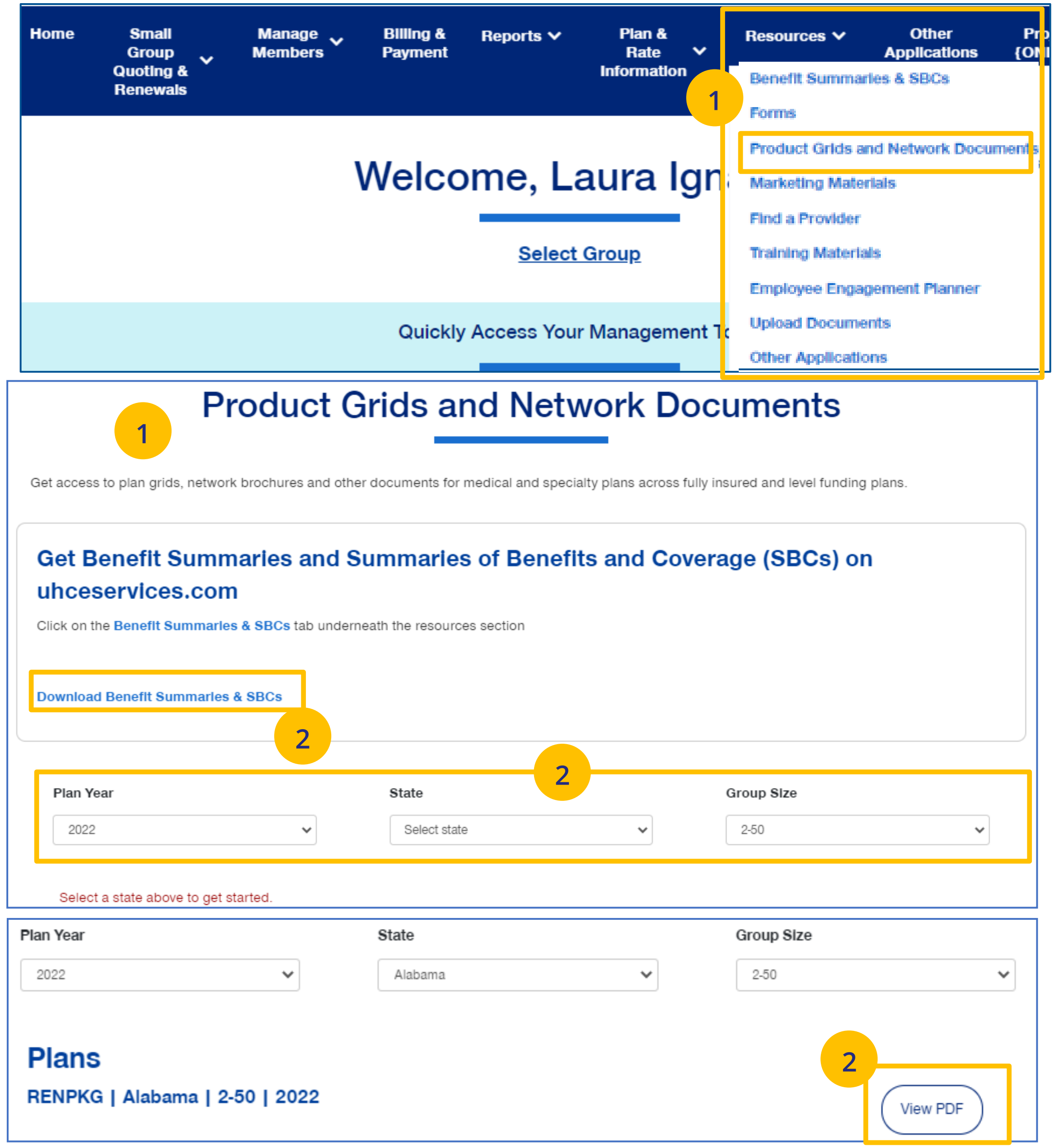
The **Product Grids and Networks Documents** link provides access to product grids, network brochures and other documents for medical and specialty plans across fully insured and level funded plans.

1. Click the **Product Grids and Network Documents** link. The **Product Grids and Network Documents** screen displays.

2. You can (1) click the **Download Benefit Summaries and SBCs** link to generate 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.

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

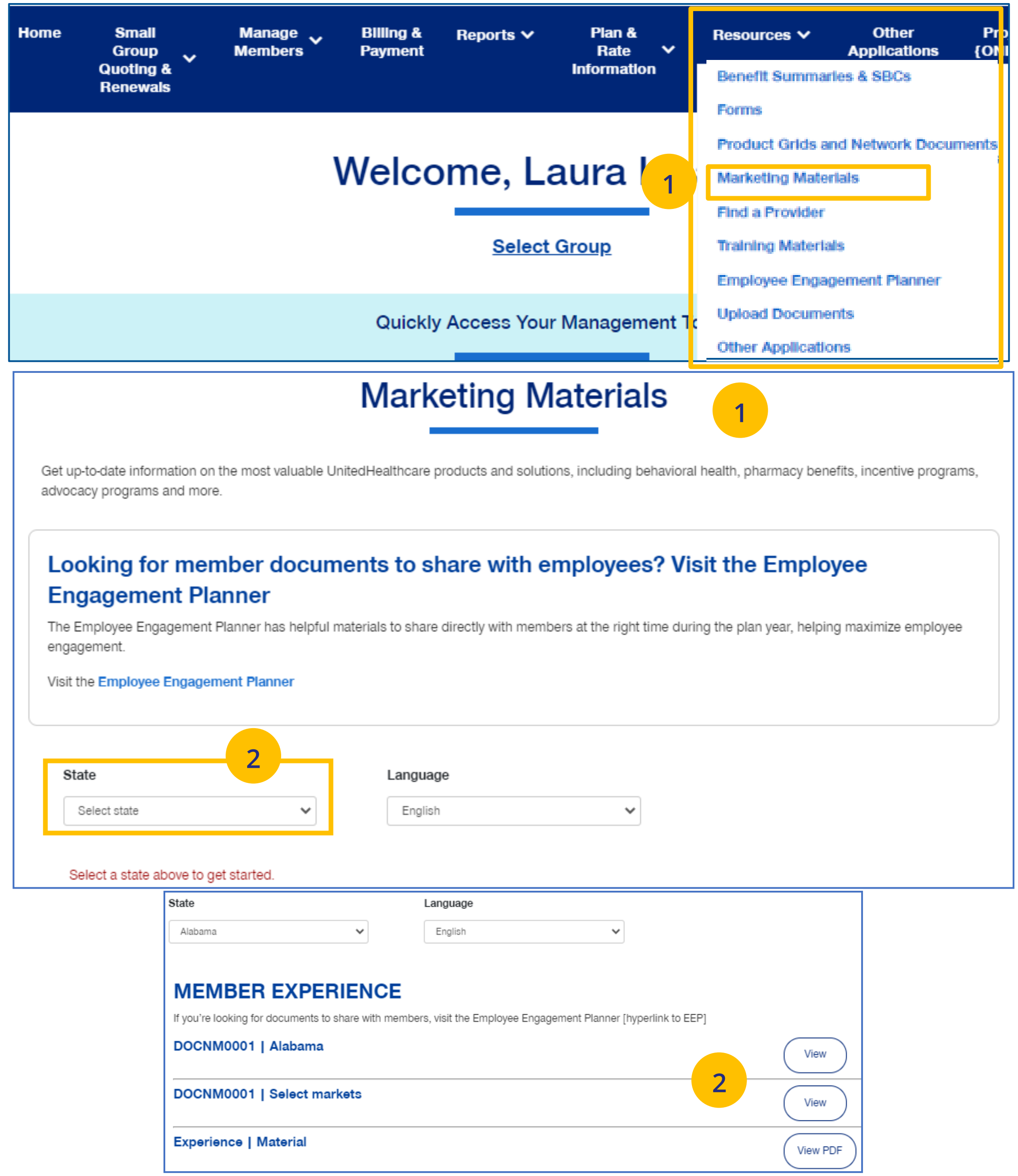


10 | Marketing Materials

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

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

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



10 | Find a Provider

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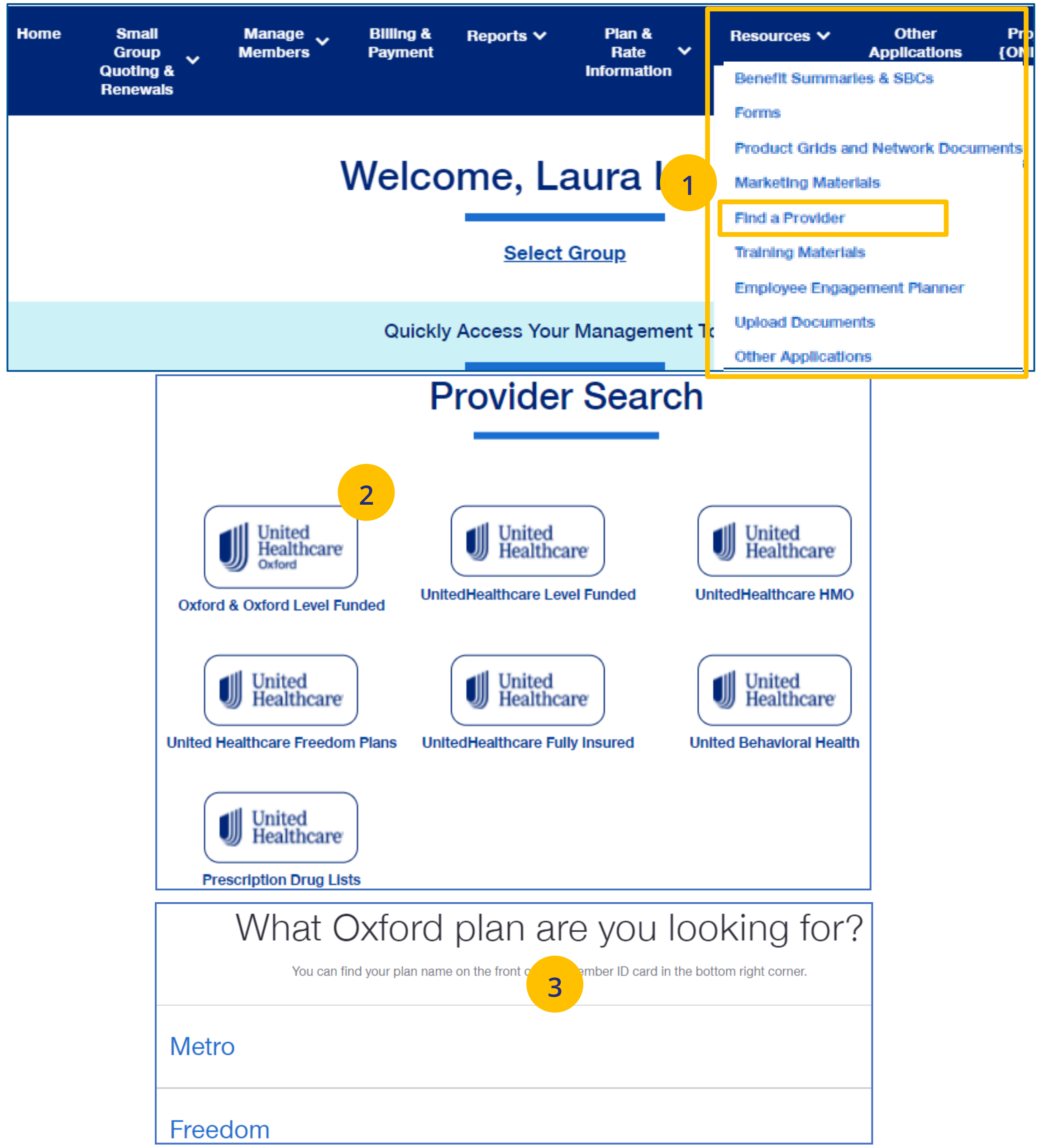
The **Find a Provider** tab allows you to search for a provider for a specific plan.

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.

10 | Find a Provider (continued)

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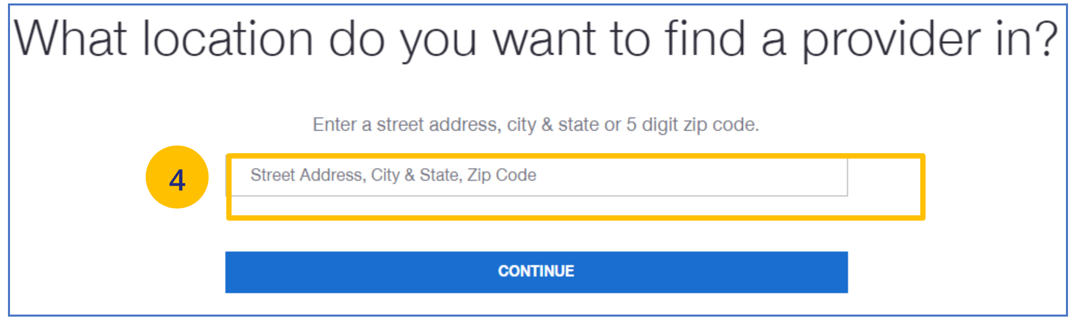
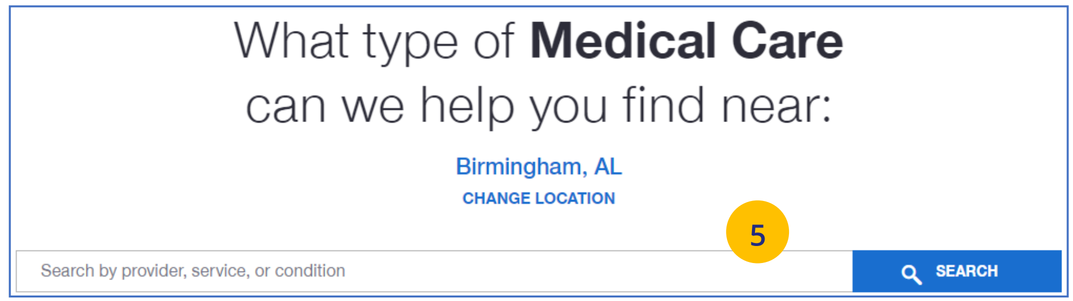
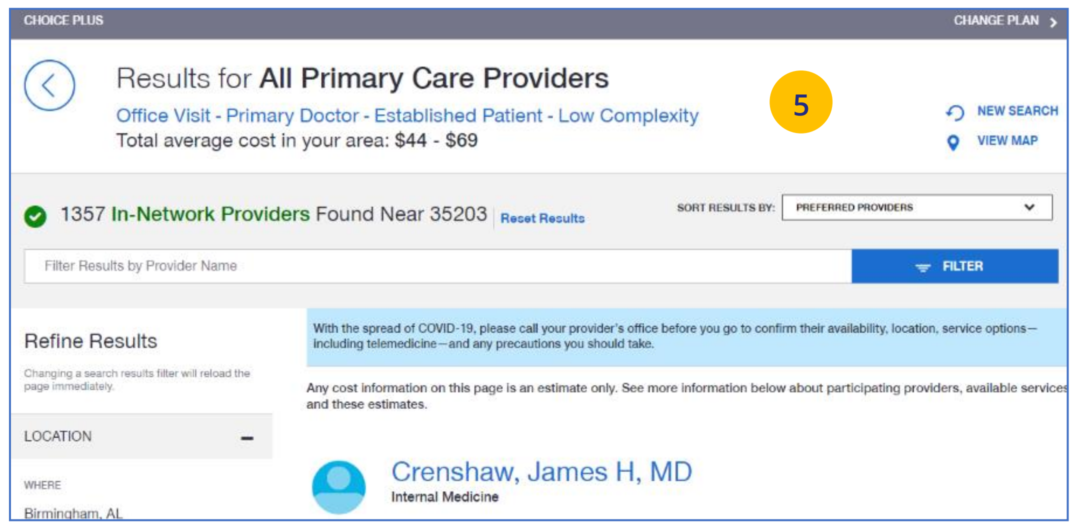
4. Enter the location of your provider and click Continue.

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







10 | Find a Provider (continued)

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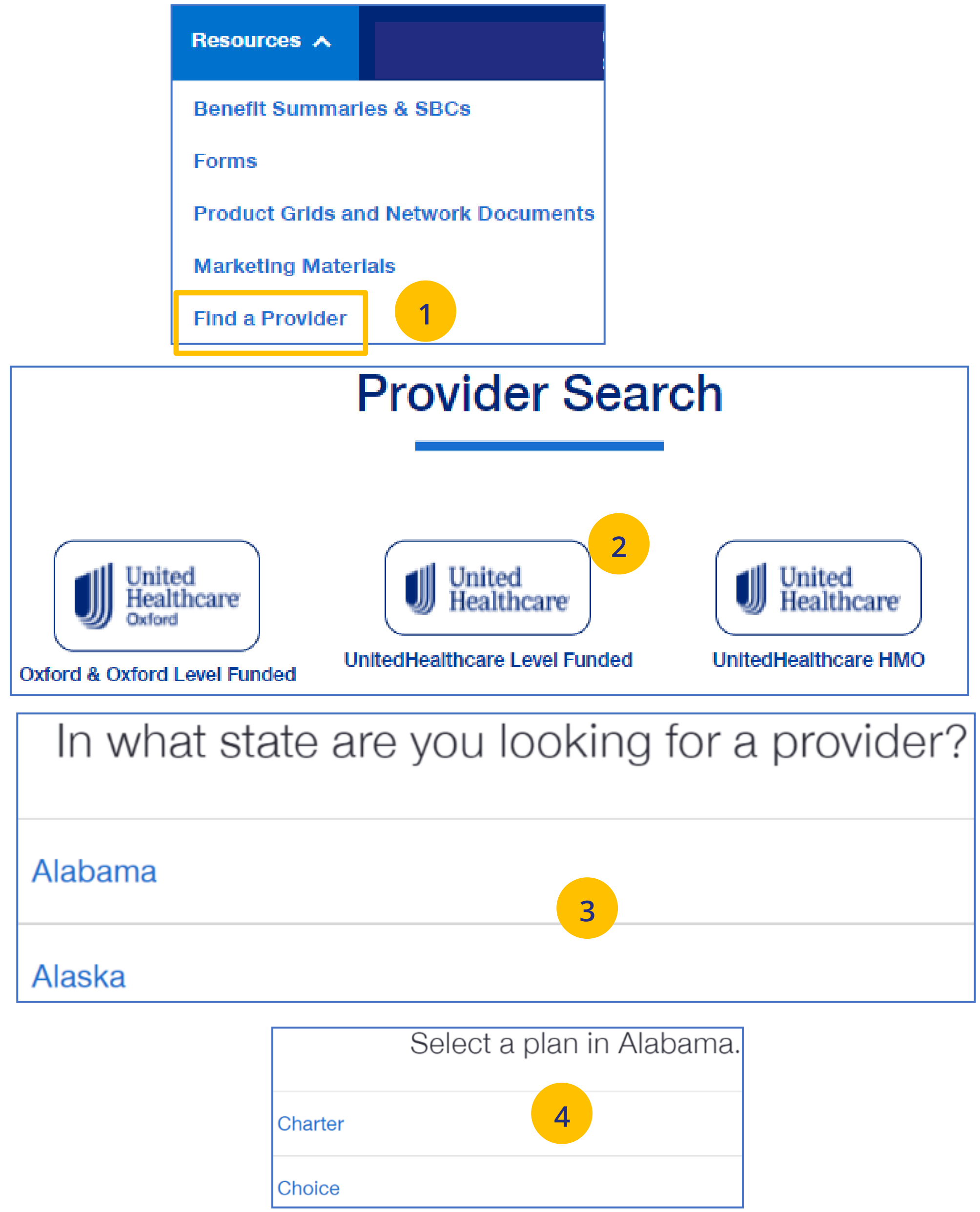
Find A Provider: Level Funded

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.



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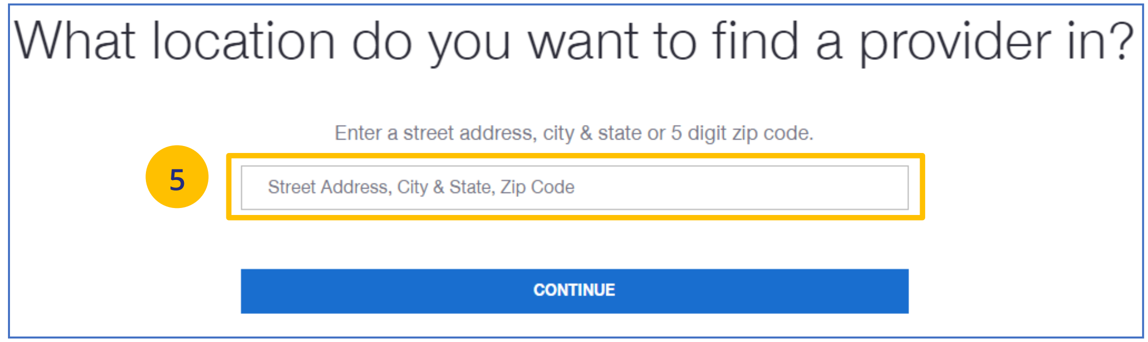
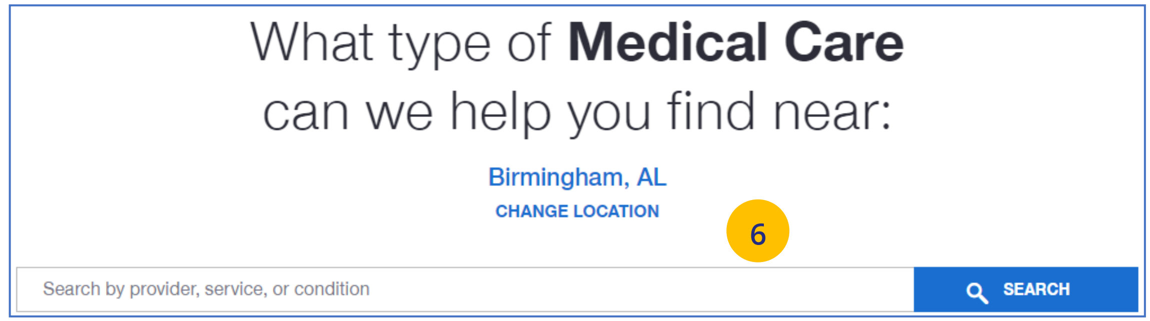
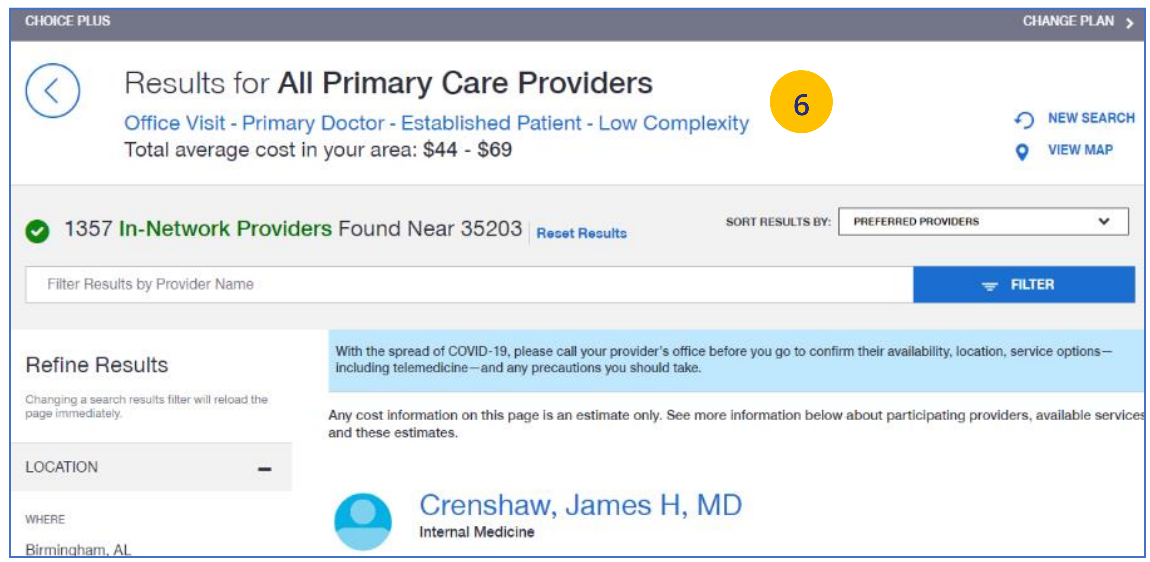
10 | Find a Provider (continued)

5. Enter the location of your provider and click Continue.

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







10 | Find a Provider (continued)

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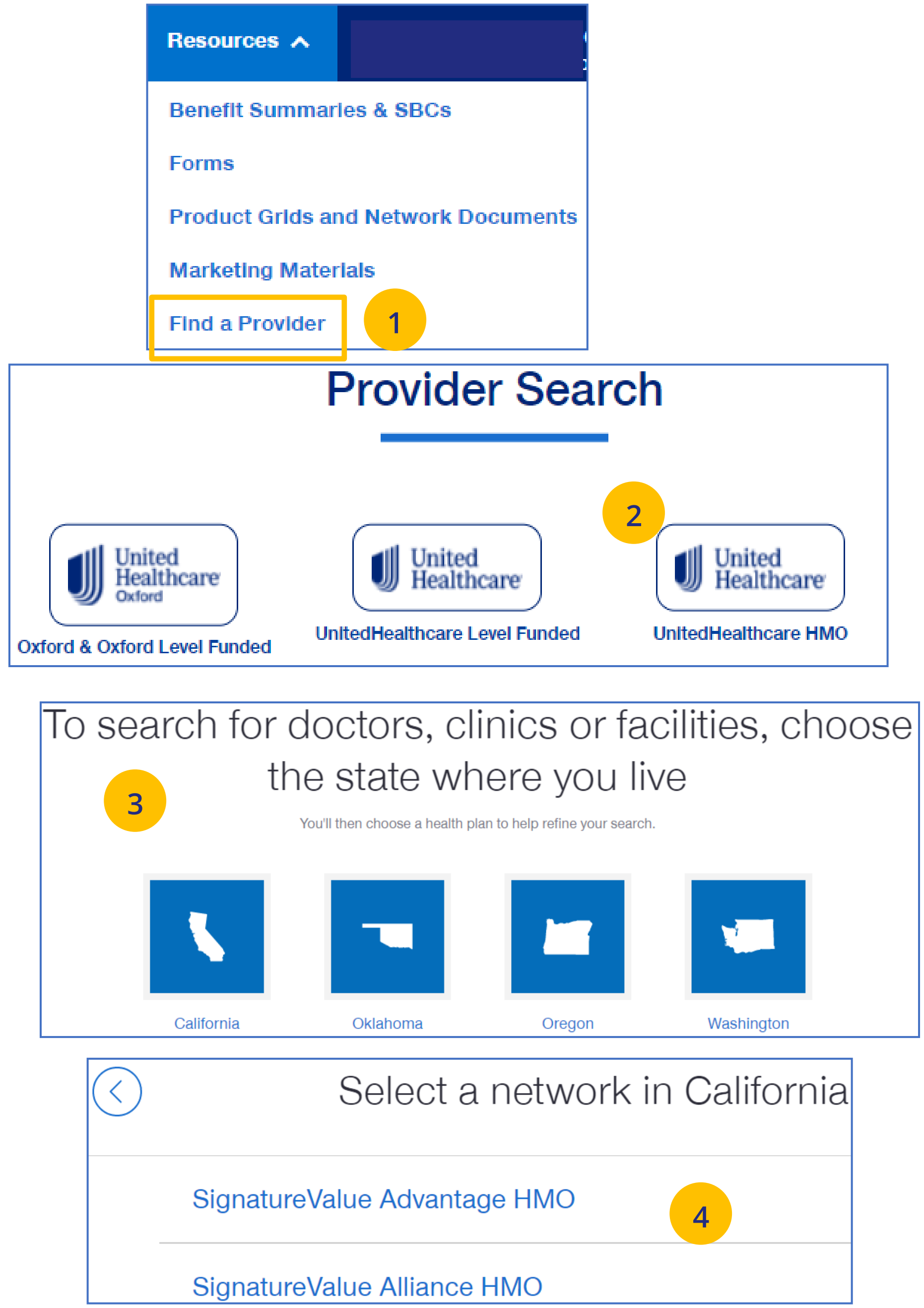
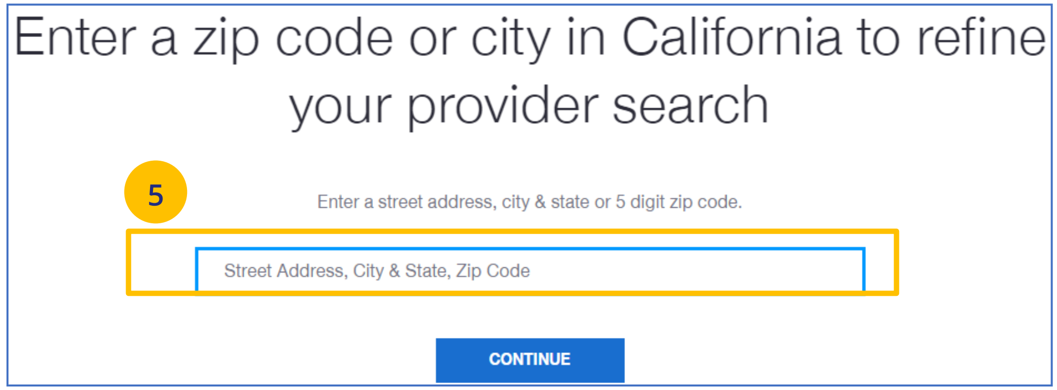
Find A Provider: UnitedHealthcare HMO

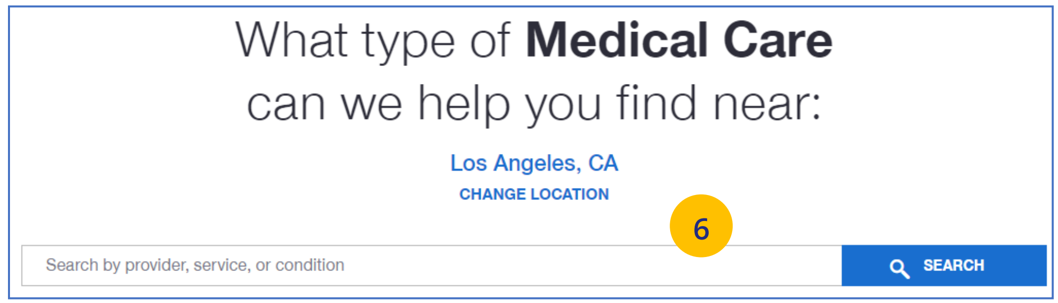
1. Select **Find a Provider**.
2. Click **UnitedHealthcare HMO.**
3. Select the state where your provider resides.
4. Select a network in the state you selected.

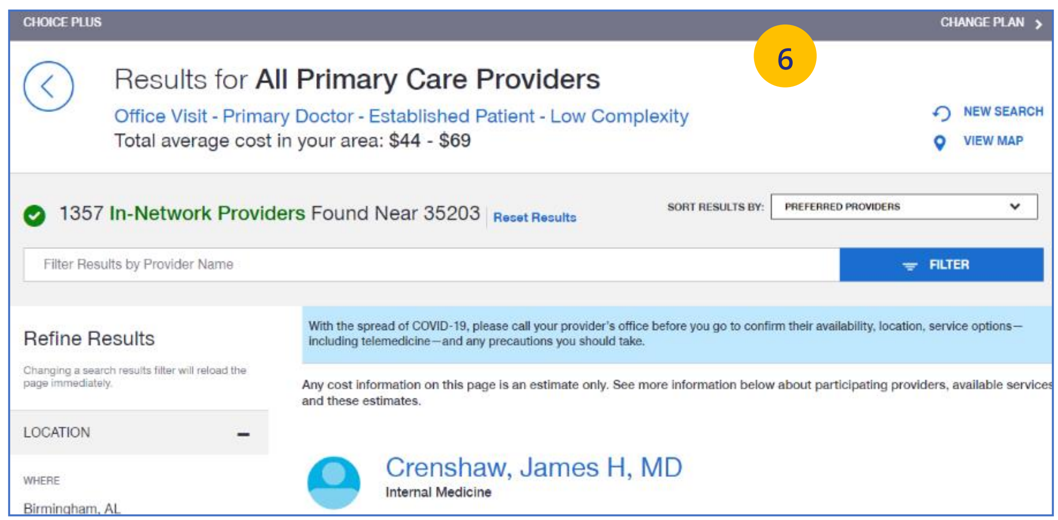


10 | Find a Provider (continued)

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







Find A Provider: UnitedHealthcare Freedom Plans

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

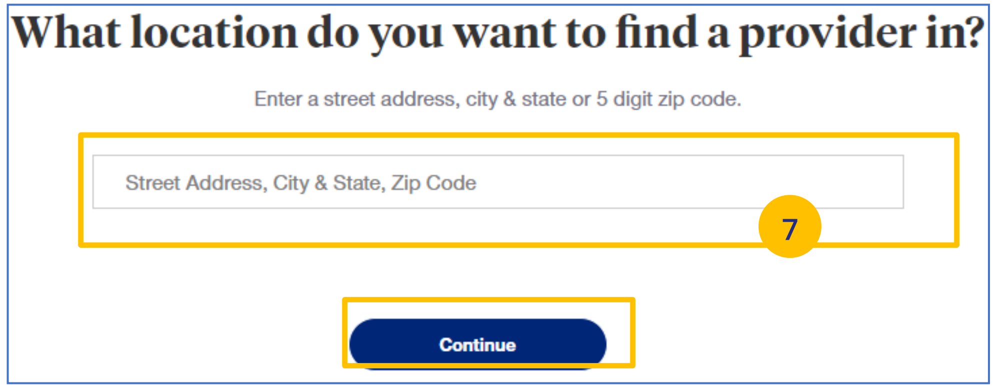
10 | Find a Provider (continued)

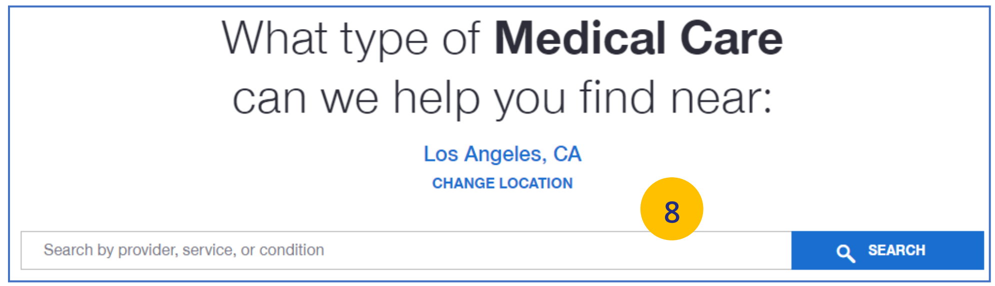
4. Select **Individual and Family** or **SHOP (Small Business Health Plan Options Program)**.
5. Select the specific state you need.
6. Select the network in your state.

10 | 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.





10 | Find a Provider (continued)

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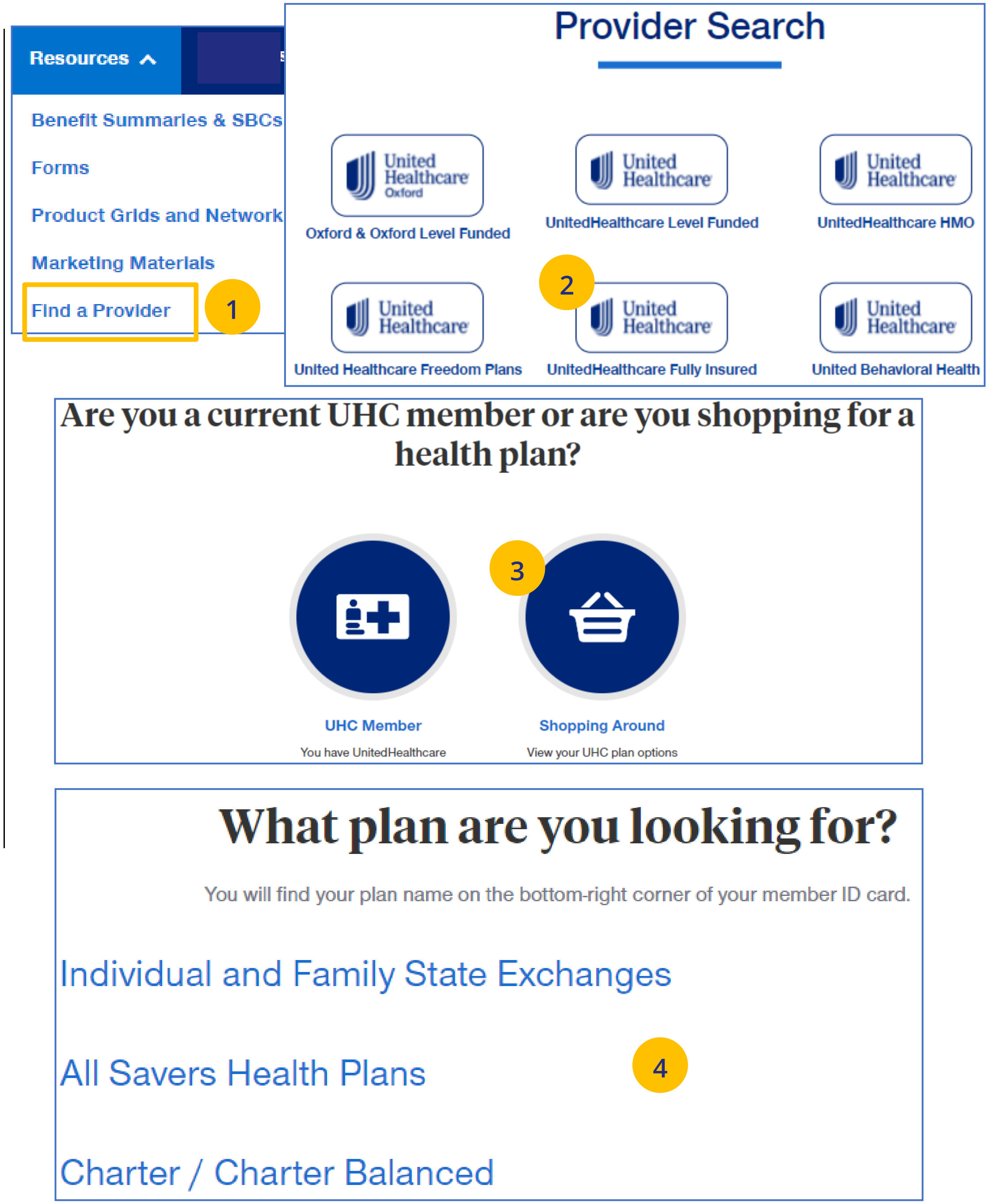
Find A Provider: UnitedHealthcare Fully Insured

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.



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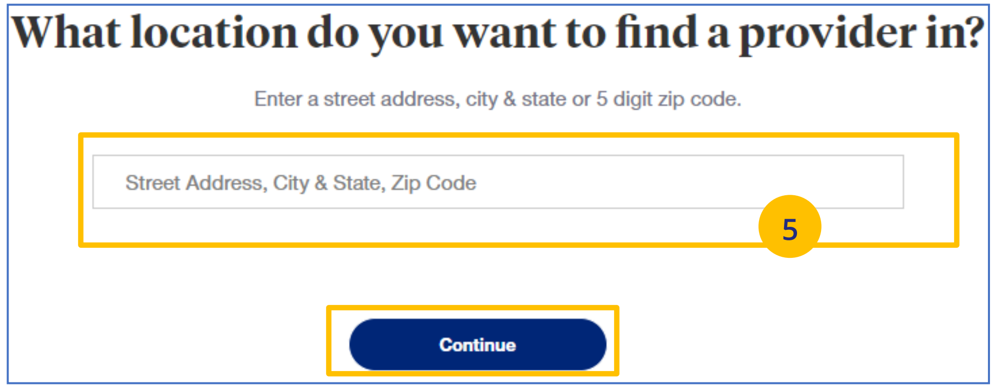
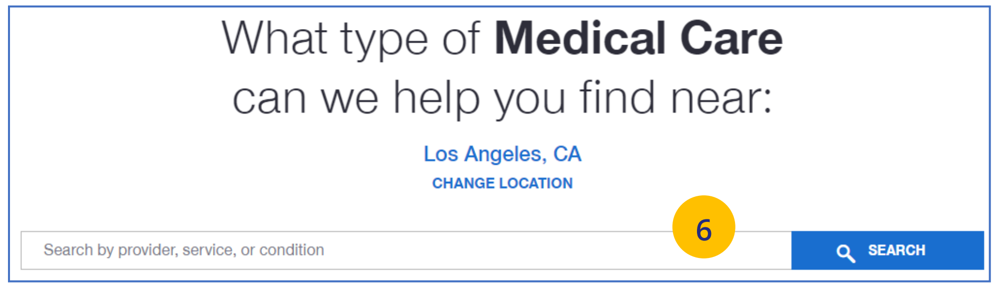
10 | Find a Provider (continued)

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.

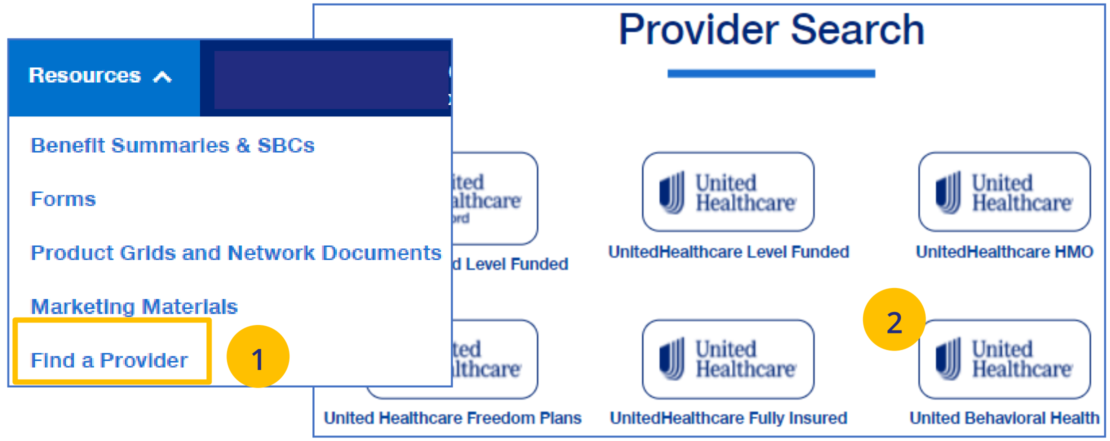


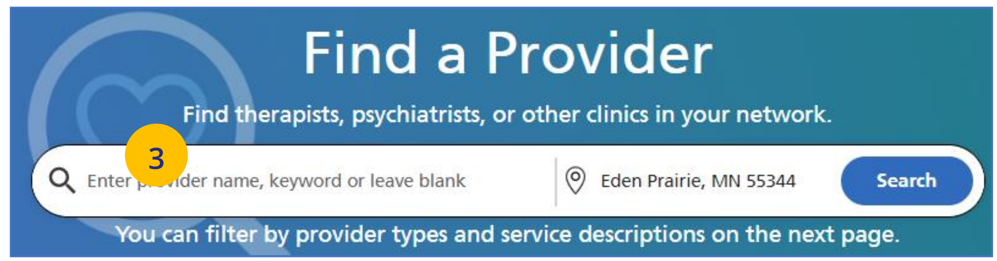


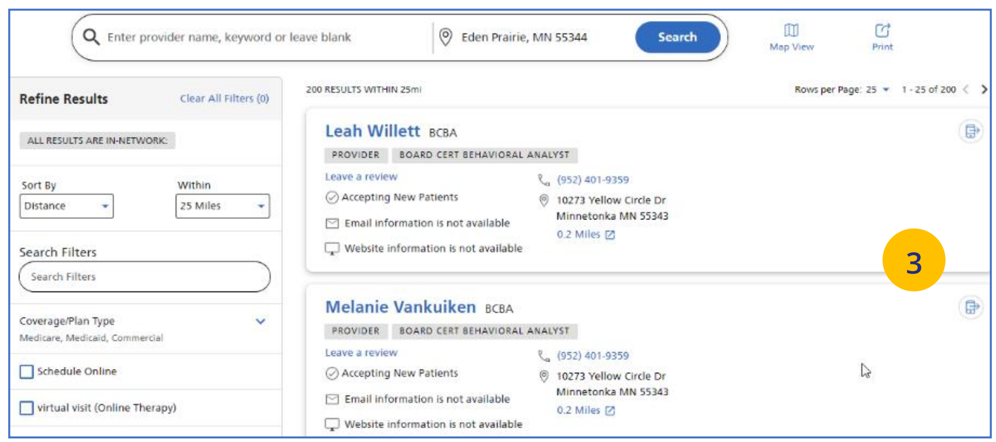
10 | Find a Provider (continued)

Find A Provider: United Behavioral Health

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







10 | Find a Provider (continued)

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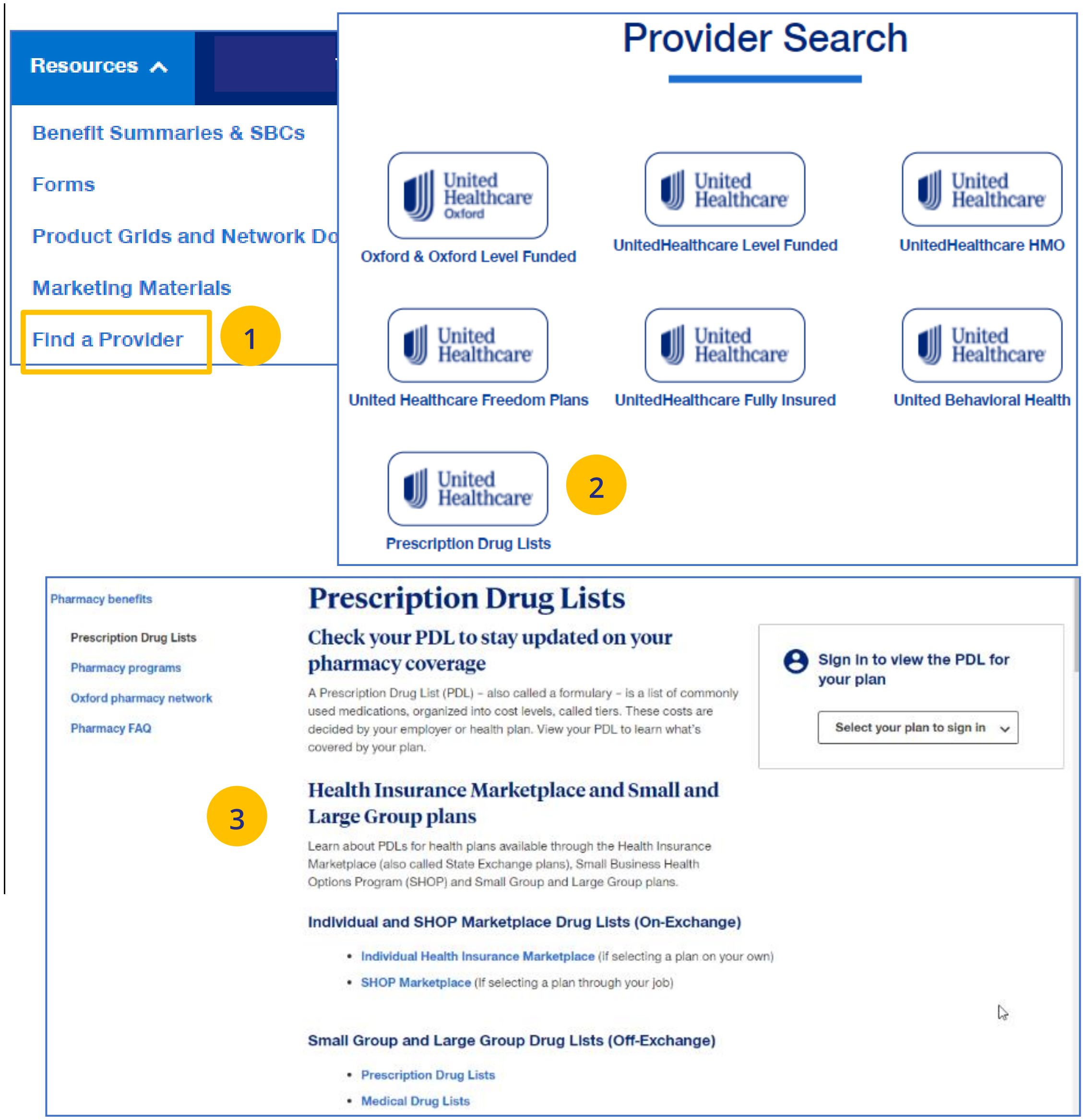
Find A Provider: Prescription Drug Lists

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



10 | Training Materials

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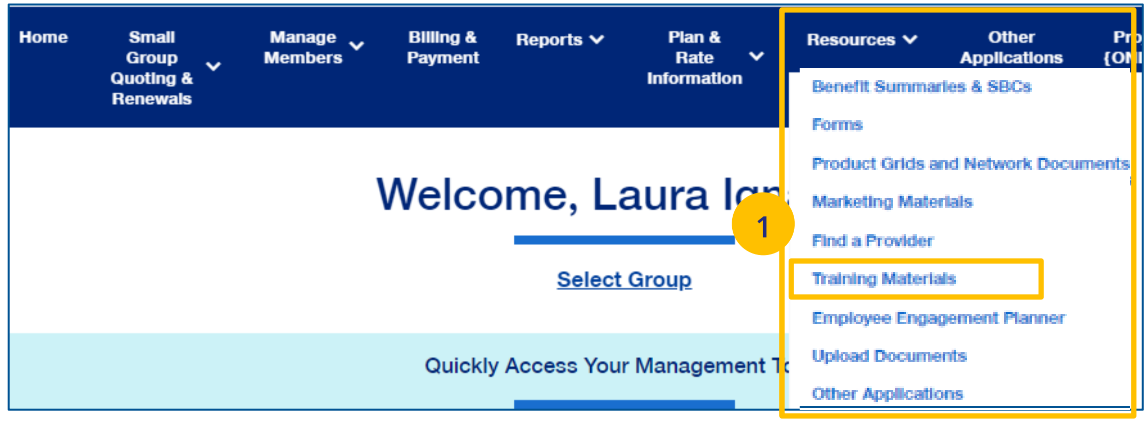
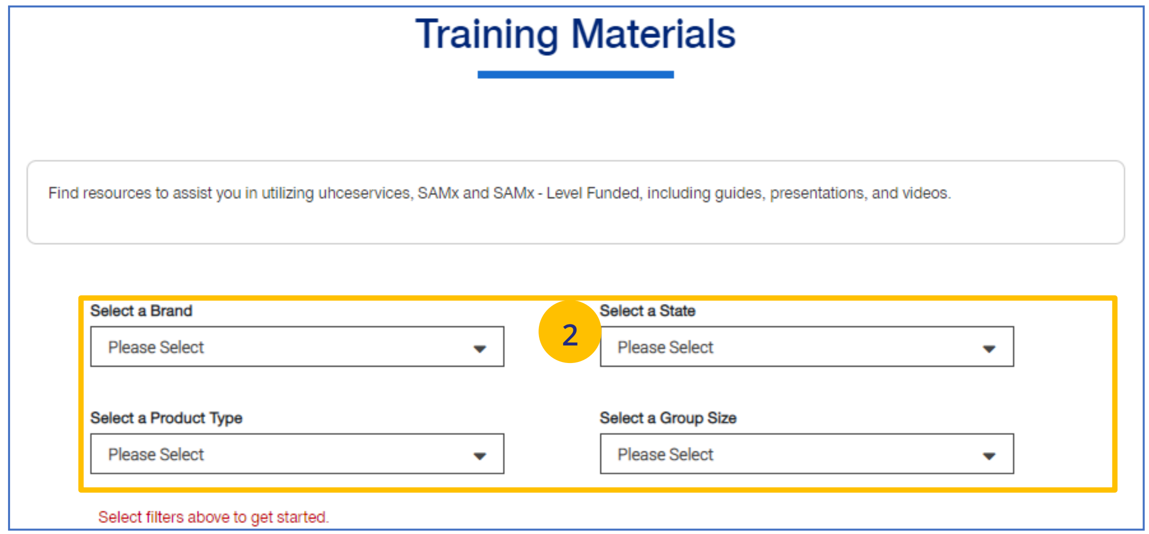
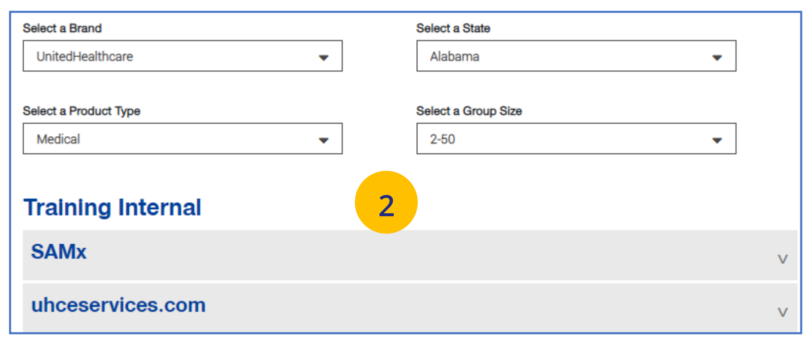
The **Training Materials** link allows you to access training resources, including guides, presentations and videos.

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







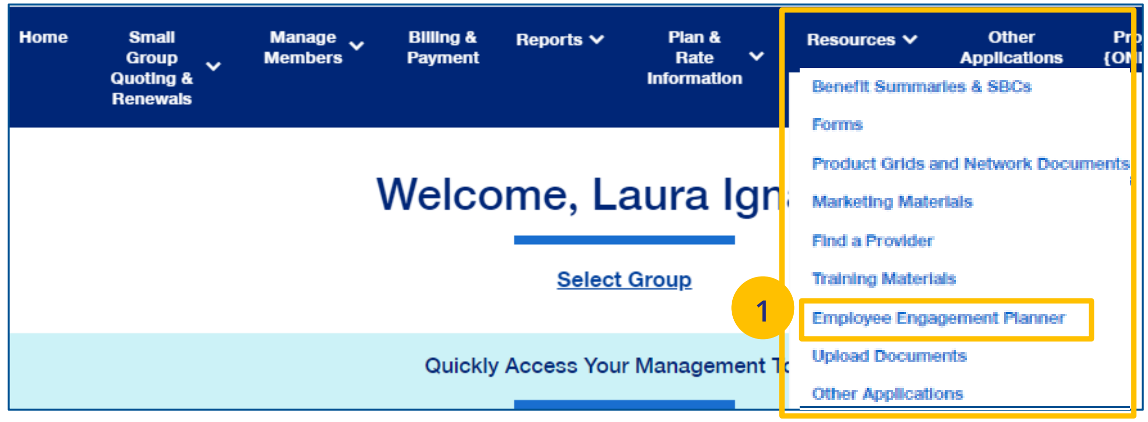
10 | Employee Engagement Planner

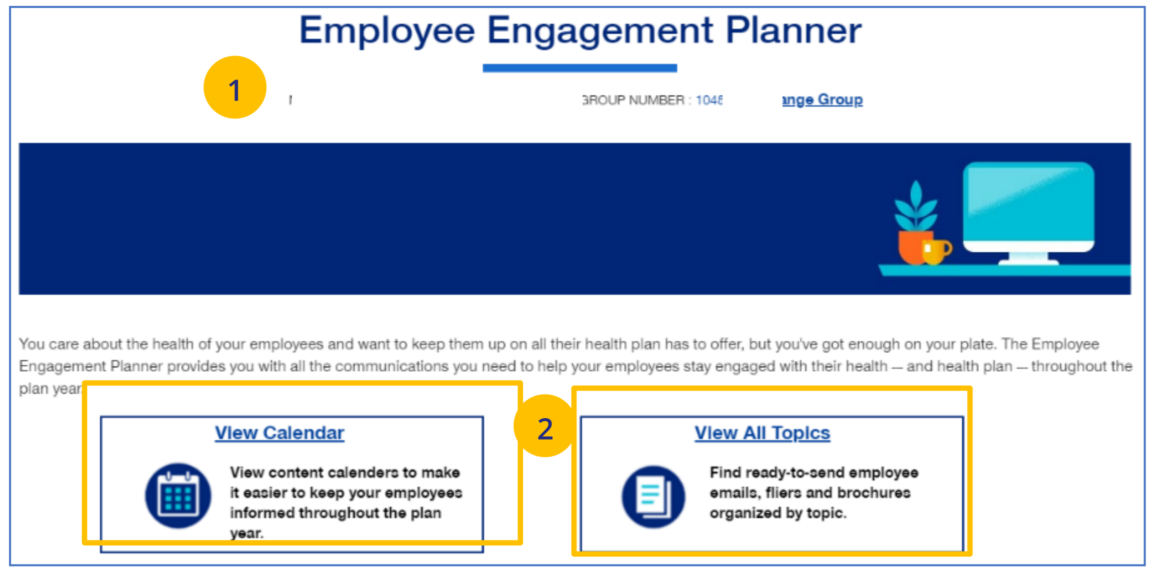
The **Employee Engagement Planner** allows you to view a calendar and documents that can be sent to employees to keep them information.

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

5. Click the **Employee Engagement Planner** tab. The **Employee Engagement Planner** screen displays.

6. Click **View Calendar or View All Topics**.





10 | Employee Engagement Planner (continued)

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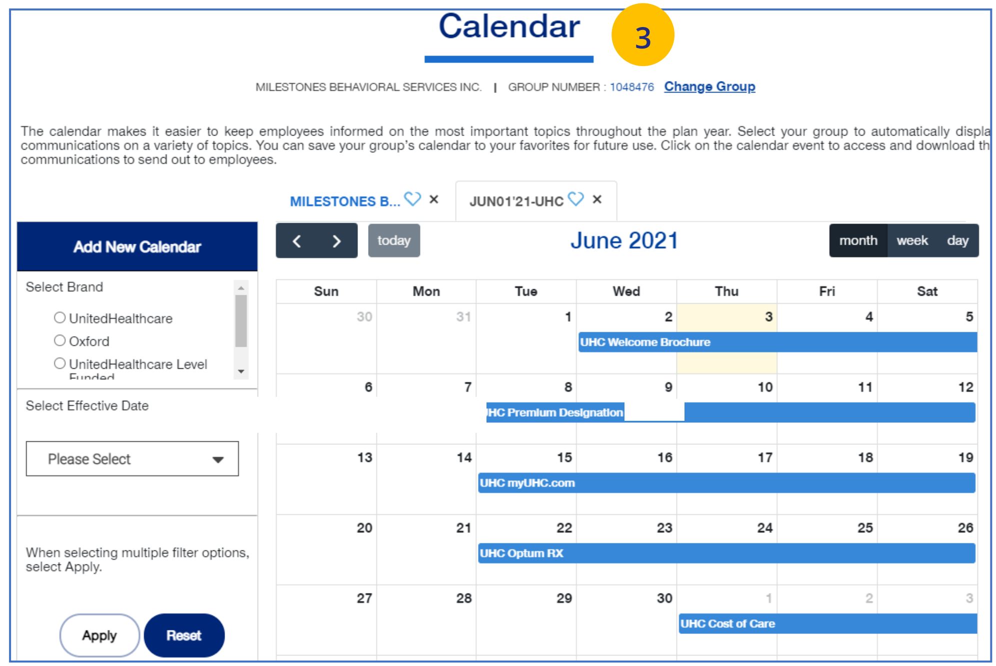
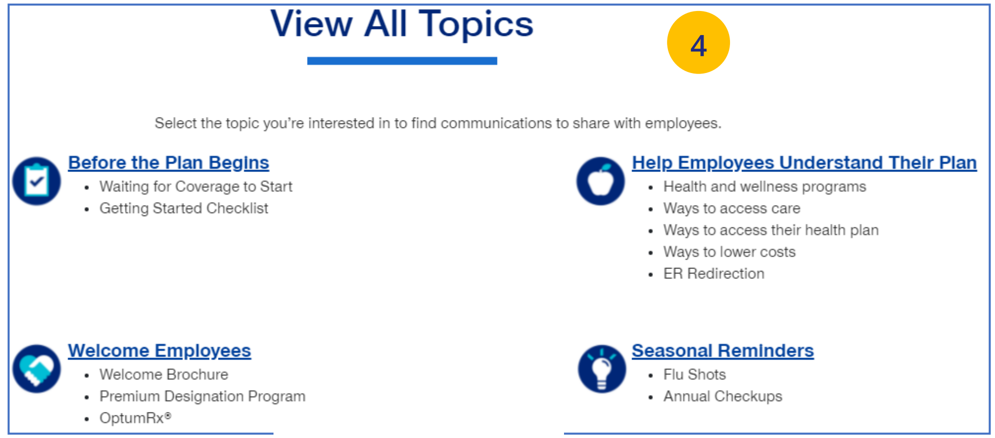
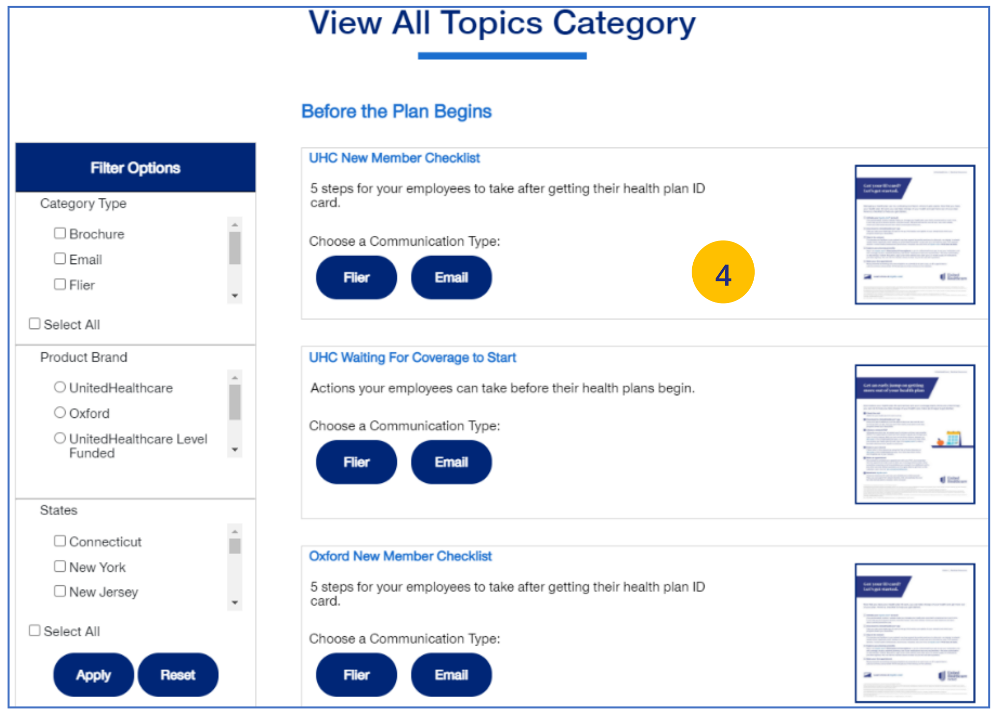
3. **View Calendar** – Select a group to see documents based on group brand and effective date. Important communications that can be downloaded and sent to employees.



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.





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10 | Upload Documents

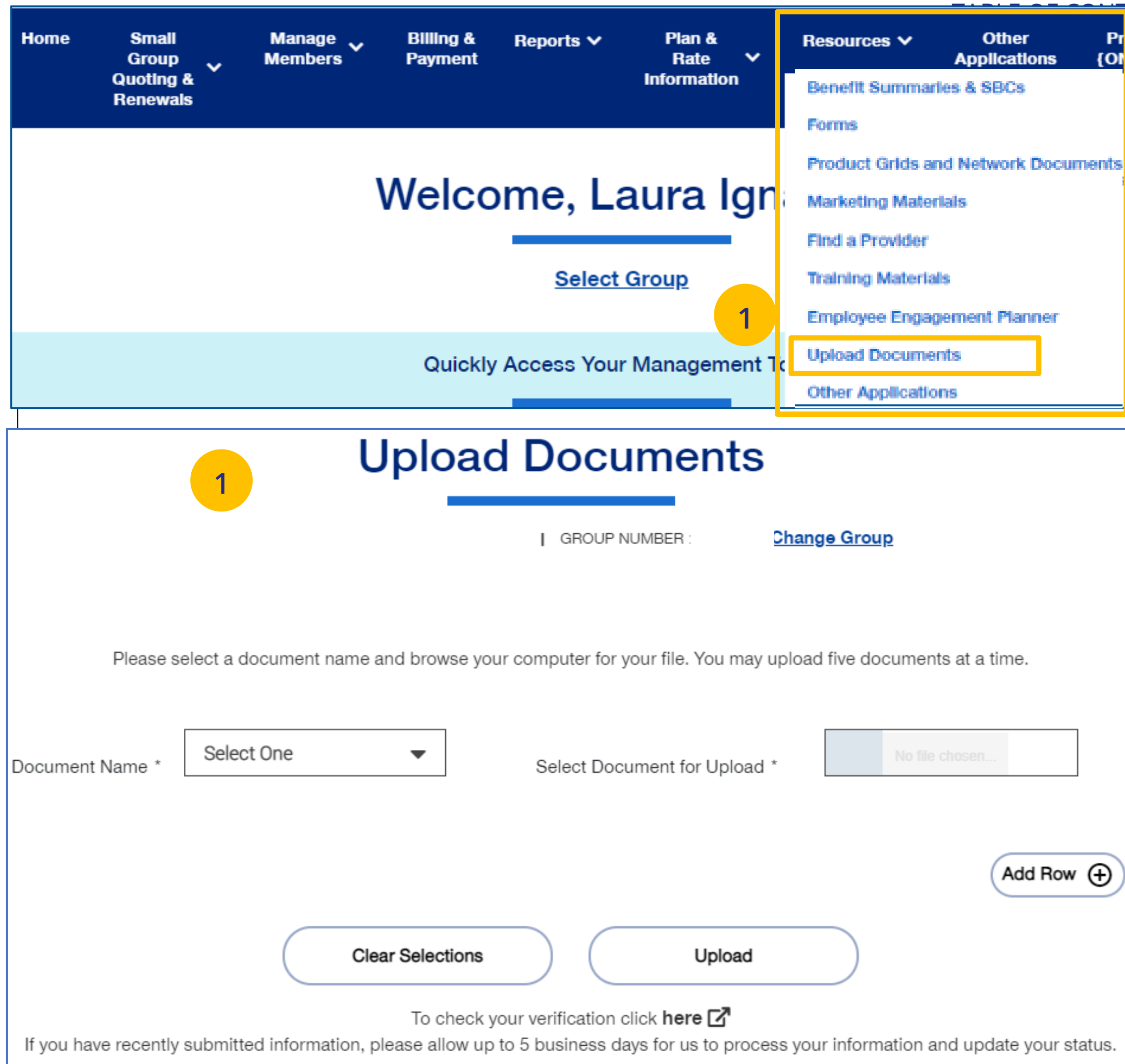
The **Upload Documents** tab allows you to select and upload a specific document. **This only applies if you have permission to upload documents.**

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.



10 | Upload Documents (continued)

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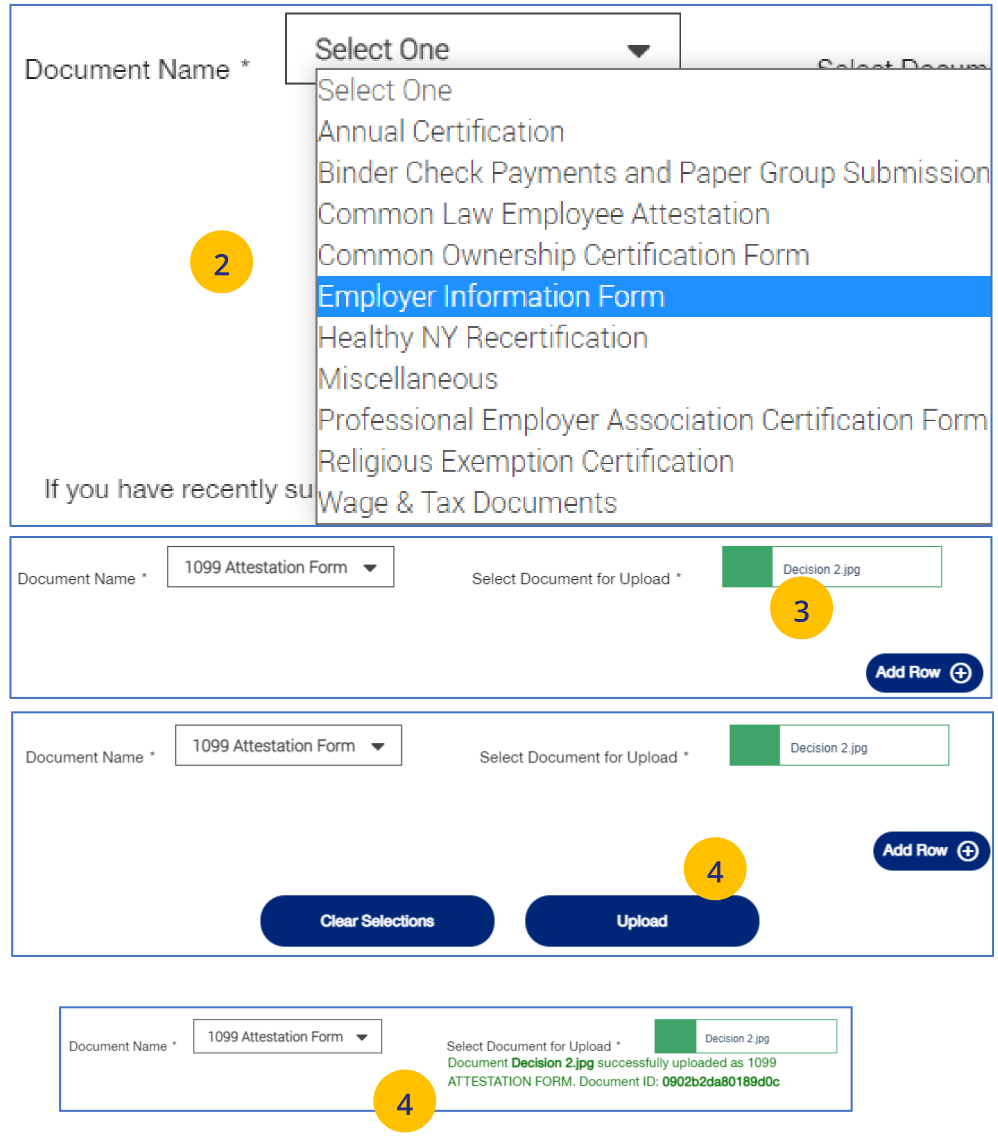
2. Use the **Document Name** drop-down to select the document you need to upload.

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