



Uhceservices.com Reference Guide for Employers



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

This web site is no longer supported for Internet Explorer and Firefox. Use Microsoft Edge, Chrome or Safari for the best experience.

Using this Document

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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.

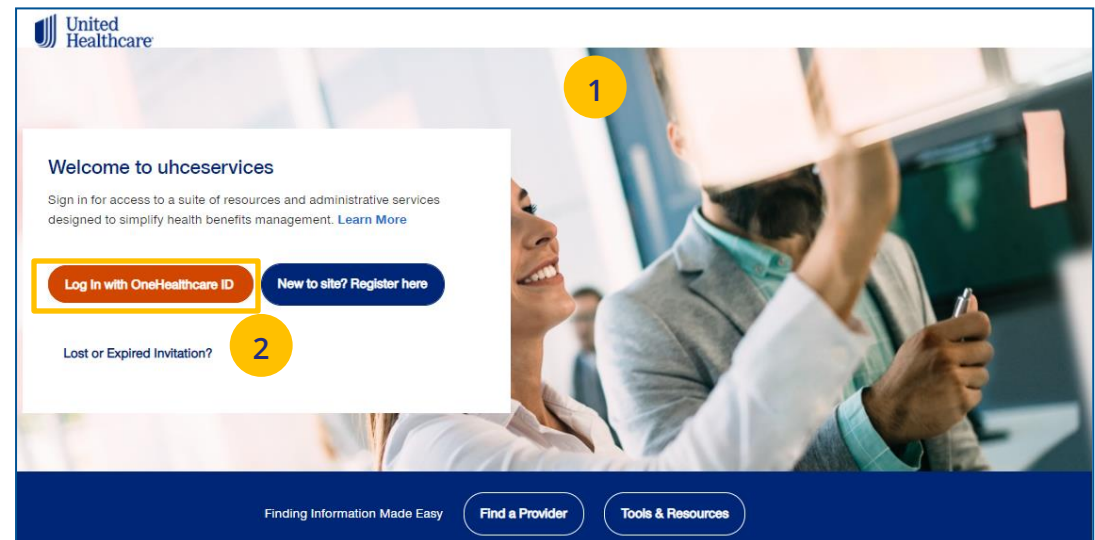
NOTE: Registration invites are active for 60 days. If your invite expires, contact the technical support line.

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.



2 | Home


The **Home** page displays the following:

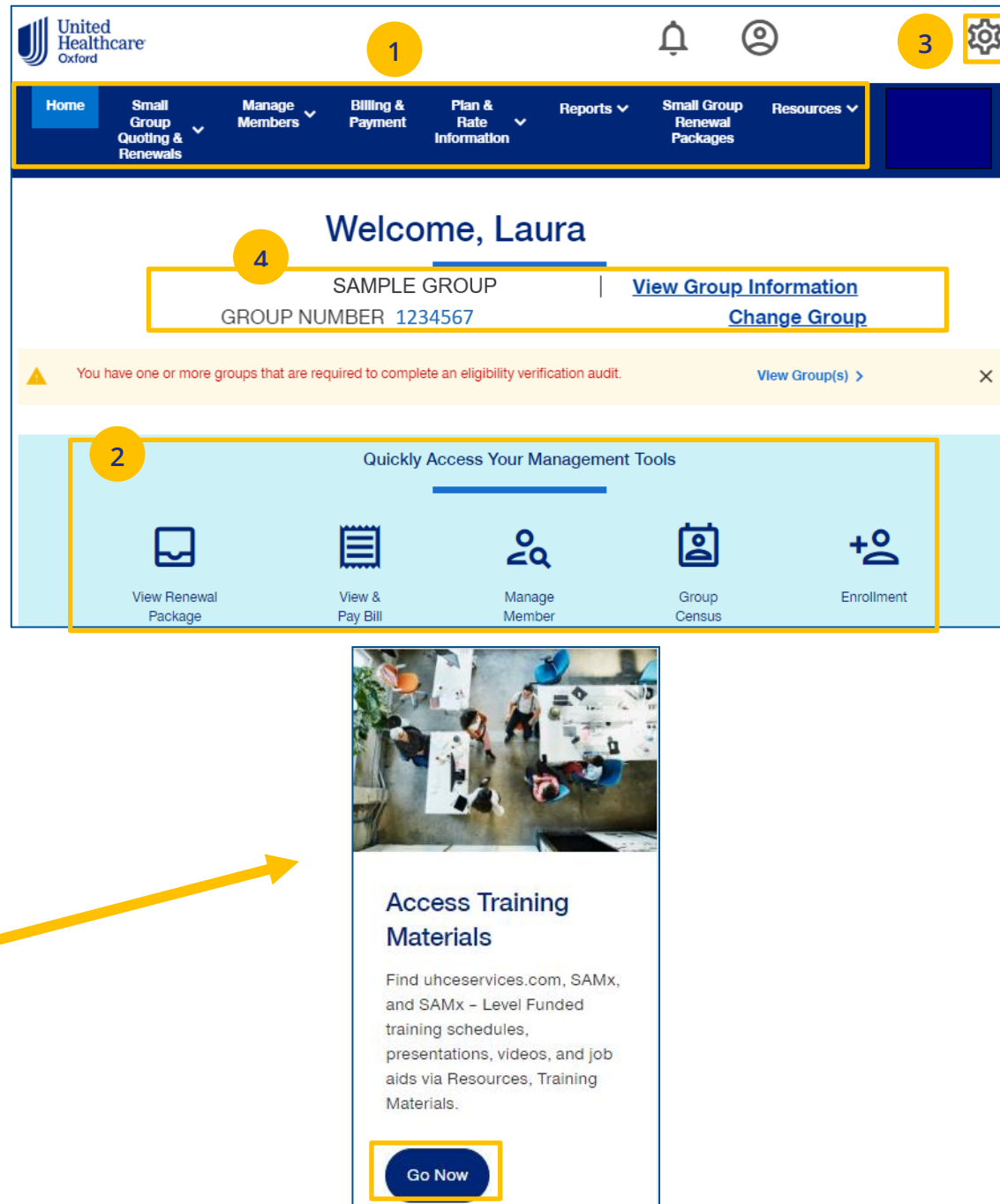
1. Menu items across the top of the page
2. Quick Access links or “shortcuts” provide easy access to the most common tasks performed.
3. Gear icon that allows you to do the following:
 - invite others to use uhceservices.com
 - view your personal information
 - change your password
 - view messages or 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.



The screenshot shows the United Healthcare Oxford Home page. At the top, the United Healthcare Oxford logo is on the left, and a notification bell, a user profile icon, and a gear icon are on the right. Below the logo is a navigation bar with links: Home, Small Group Quoting & Renewals, Manage Members, Billing & Payment, Plan & Rate Information, Reports, Small Group Renewal Packages, and Resources. A yellow box labeled '1' highlights the navigation bar. Below the navigation bar, the main content area starts with a 'Welcome, Laura' message. A yellow box labeled '4' highlights a box containing 'SAMPLE GROUP' and 'GROUP NUMBER 1234567', with links for 'View Group Information' and 'Change Group'. Below this is a yellow banner with a warning message: 'You have one or more groups that are required to complete an eligibility verification audit.' and a 'View Group(s)' link. A yellow box labeled '2' highlights a section titled 'Quickly Access Your Management Tools' with five icons: View Renewal Package, View & Pay Bill, Manage Member, Group Census, and Enrollment. Below this is a section titled 'Access Training Materials' with a description and a 'Go Now' button. A yellow box labeled '3' highlights the gear icon in the top right corner.



2 | 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 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**.

The diagram illustrates the group selection process in three steps:

- Step 1:** A parent group (_PARENT4) is selected, showing a "GROUP NUMBER" and a "Change Group" link. A "Select Child Group" link is highlighted with a yellow box and a yellow circle with the number 1.
- Step 2:** A child group (_CHILD2) is selected, showing a "GROUP NUMBER" and a "Select Group" button. A yellow circle with the number 1 is next to the child group name, and a yellow circle with the number 2 is next to the "Select Group" button.
- Step 3:** The final state shows both parent and child group information. The parent group (_PARENT4) shows "GROUP NUMBER" and "Change Group". The child group (_CHILD2) shows "GROUP NUMBER" and "Change Child Group". A yellow circle with the number 2 is next to the "Change Child Group" link. A yellow arrow points from the "Select Group" button in Step 2 to the "Change Child Group" link in Step 3.

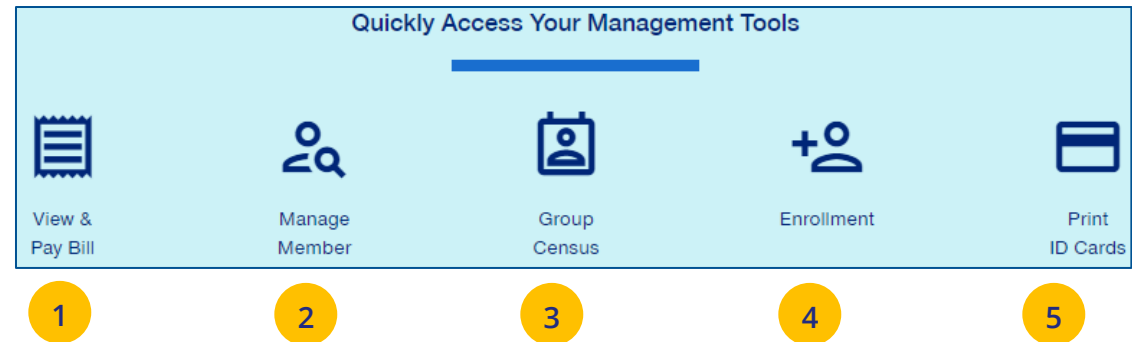


3 | Quickly Access Your Management Tools

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

These shortcuts most often include:

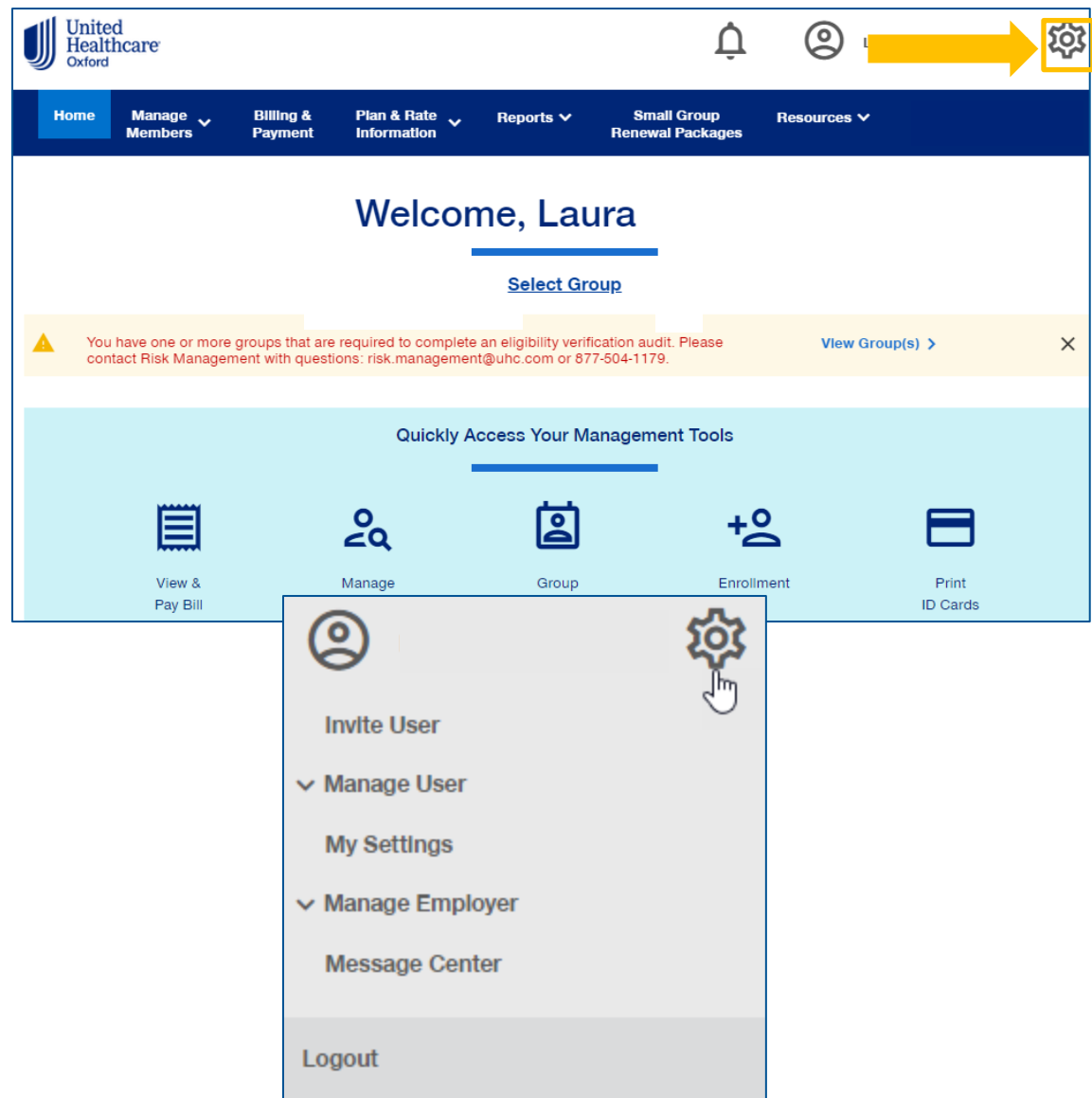
1. **View & Pay Bill** – Displays Billing & Payment screen.
2. **Manage Member** – Search for a member by Member ID or Name.
3. **Group Census** – Access Member & Subscriber Lists.
4. **Enrollment** – Enroll a new member or dependent
5. **Print ID Cards** – Request a Health Plan ID card for a subscriber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



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

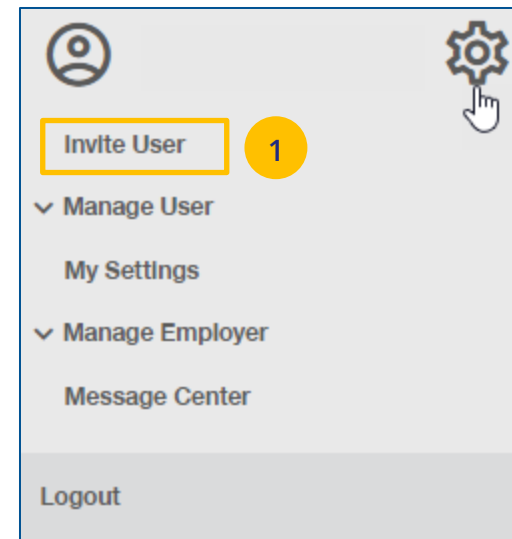
Employers can give support staff access to uhceservices.com so they can perform functions. To invite a someone to use uhceservices.com:

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.



Invite an Employer User

Group Name : 2

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 *

First Name *

Last Name *

Last Name *

Email *

Email *

Role *

Choose a Role ▼

Compare Roles

Cancel

Create 5




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.												

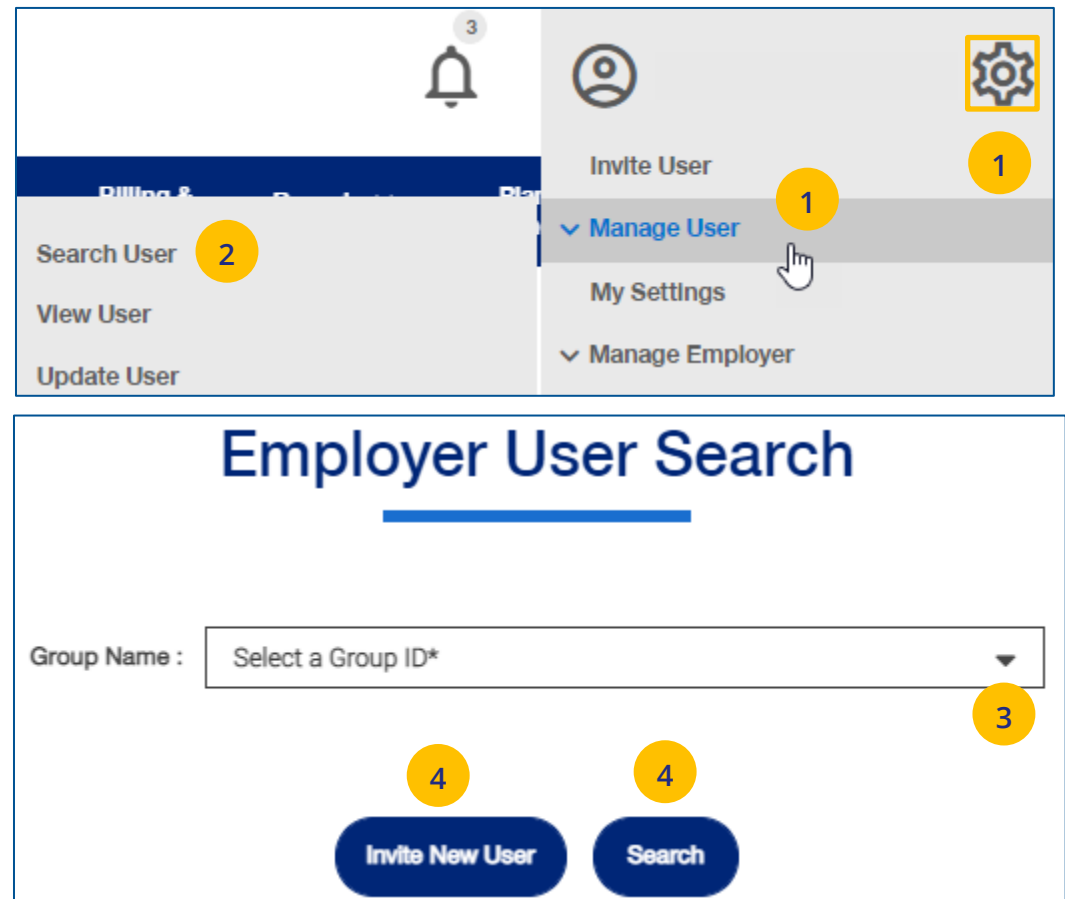
CER = Claims Experience Report



4 | Manage User


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

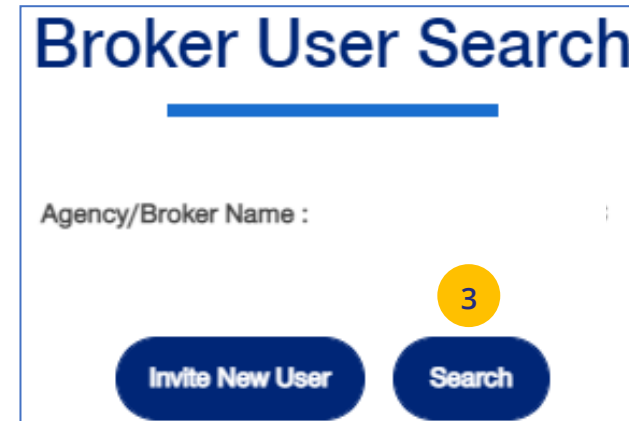
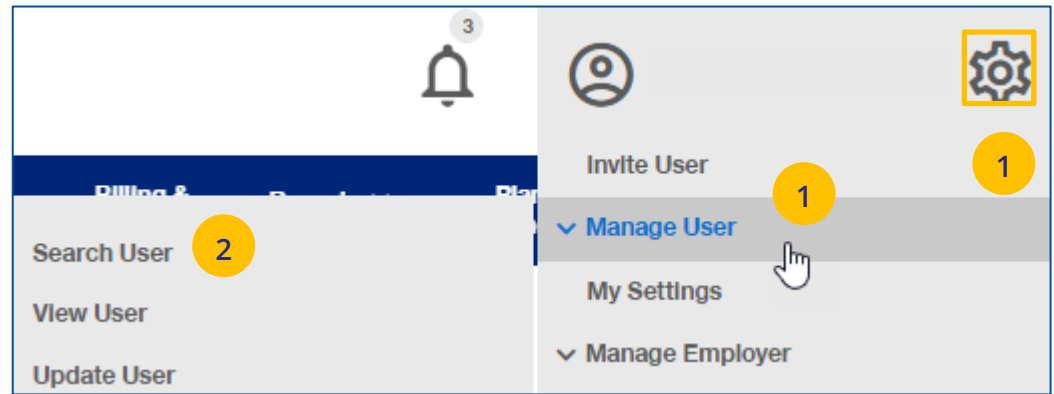
1. Click the **gear icon**  and select **Manage User**. You will have three options:
 - **Search User** – You can search for a user or invite a new user (if you have that capability)
 - **View User** – You can search for a user or invite a new user (if you have that capability)
 - **Update User** – You 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** 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
		Employer Lead	10/31/2019	11/29/2020

Enabled

Select User

One Healthcare ID	User Email	Role	Last Login	Deactivation
ambiaEmployerMasterS...	ambia_ahmed@optu...	Employer Lead	04/10/2020	05/10/2021

10001, 10001 (Invited)

Select User

Re-Invite

5

One Healthcare ID	User Email	Role	Last Login	Deactivation
	10001@box.az	Employer Lead	N/A	N/A

Gerber, Kathleen (Invited)

Select User

Re-Invite

5

One Healthcare ID	User Email	Role	Last Login	Deactivation
	kathleen_gerber@...	Agency/Broker User	N/A	N/A

User Kathleen Gerber successfully re-invited as Agency/Broker User.





4 | My Settings

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

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

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The image shows a user interface for the 'My Settings' page. At the top, there is a sidebar menu with options: 'Invite User', 'Manage User' (with a dropdown arrow), 'My Settings' (highlighted with a yellow box), 'Manage Employer' (with a dropdown arrow), 'Message Center', and 'Logout'. A gear icon with a hand cursor is in the top right corner of the sidebar. The main content area is titled 'My Settings' and contains two buttons: 'Change Password' and 'Manage My Profile'. Below these, a message states 'Your changes will be reflected after re-login.' The 'Personal Information' section includes fields for 'First Name', 'Last Name', 'Email', and 'One Healthcare ID', with an 'Edit' button. The 'My Associations' section shows a table with one entry: 'Broker Role: Admin'. Below this, the 'Permissions' section lists 'Billing & Payment' and 'Commissions', each with a plus sign to expand.



Invite User

▼ Manage User

My Settings

▼ Manage Employer

Message Center

Logout

My Settings

Change PasswordManage My Profile

Your changes will be reflected after re-login.

Personal Information

Edit

First Name

Last Name

Email

One Healthcare ID

My Associations

Broker Role: Admin	
--------------------	--

Permissions:

Billing & Payment

Commissions



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**.

My Settings

Your changes will be reflected after re-login.

Change Password **Manage My Profile** 1

Personal Information Edit

First Name	Hina
Last Name	Hinaemp
Email	chintakayala_bhavani1@optum.com
Optum ID:	Hinaemp

Manage My Profile

1 Direction 2 Selection 3 Review & Submit

What would you like to do with your One Healthcare ID - Hinaemp FAQs

2

☒ Move my associations from another One Healthcare ID into this One Healthcare ID

☐ Move my associations to another One Healthcare ID

Cancel Next 2



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

☐ 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 'Hinaemp2' and 'The Louis Agency' listed. At the bottom, there are three buttons: 'Cancel', 'Previous', and 'Submit'. The 'Submit' button is highlighted with a yellow box and a yellow circle with the number '6' next to it. A link for 'FAQs' is also visible in the top right corner.


This screenshot shows the 'Manage My Profile' page after a successful action. The progress bar at the top shows all three steps—'Direction', 'Selection', and 'Review & Submit'—are complete, with the last step marked with a checkmark in a circle. A green success message is displayed in a yellow box: 'Your move was successful. Please log off and log back in.' Below the message, a 'Log off' button is highlighted with a yellow box and a yellow circle with the number '7' next to it. A yellow circle with the number '6' is also present to the left of the success message box.

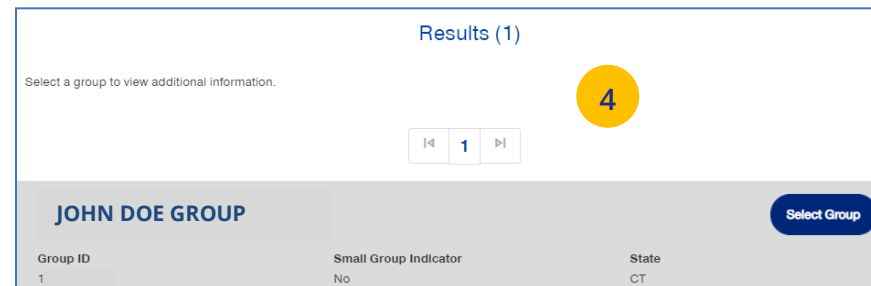
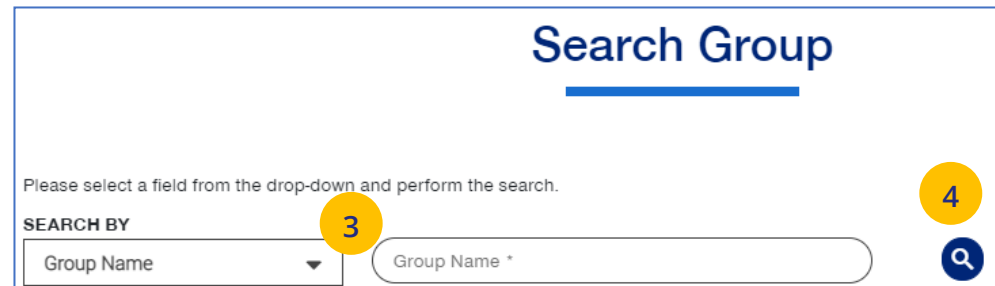
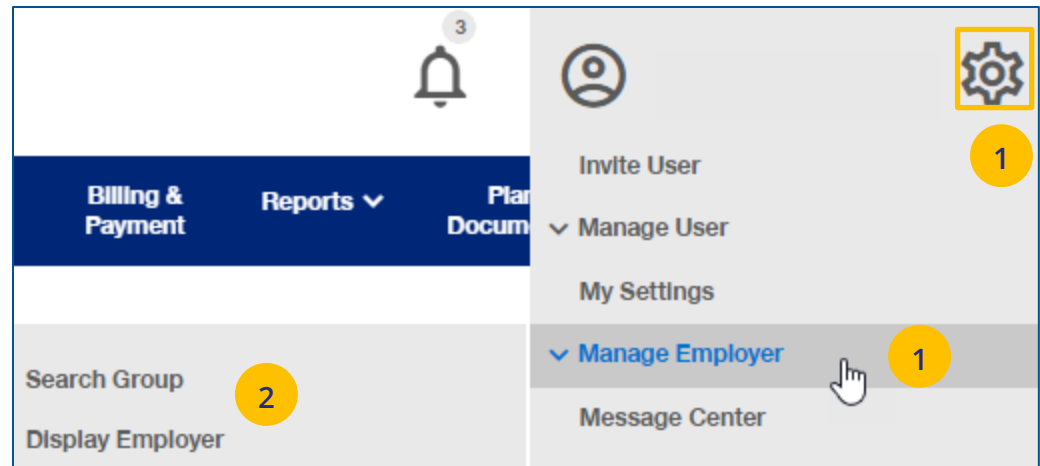


4 | Manage Employer

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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.



4 | Manage Employer (continued)

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- 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.


The screenshot displays the 'View Group' interface. At the top, a 'Results (1)' header is followed by a search bar and a 'Select Group' button. Below this, the 'JOHN DOE GROUP' header is shown with a yellow circle '5' next to it. The 'Group Information' section lists various details: Group Name (JOHN DOE GROUP), Group Number, Small Group Indicator (No), Employer Group Reporting Flag (No), Hold Eligibility (No), Situs State (NY), Next Renewal Date (12/01/2021), Pulse ID (TM12604 999), Tax ID, SIC (6162 - Mortgage Bankers and Loan Correspondents), Market Segment (Key Accounts), and Status (Medical: 09/01/2019 - 05/31/2020, Active, Policy; Medical: 09/01/2018 - 05/31/2019, Active, Policy). The 'Broker Information' section at the bottom lists two brokers with their PCIS ID, Pulse ID, CIRRUS ID, Phone, and Email. A yellow arrow points from the 'Note' text to the 'Broker Information' section.

PCIS ID	Pulse ID	CIRRUS ID	Phone	Email
18104	BC0274	1358727	631-951-9200	STATEMENTS@PGPBENEFL...
18404	BC2003	1378958	516-365-8400	RAL@RALSERVICES.COM

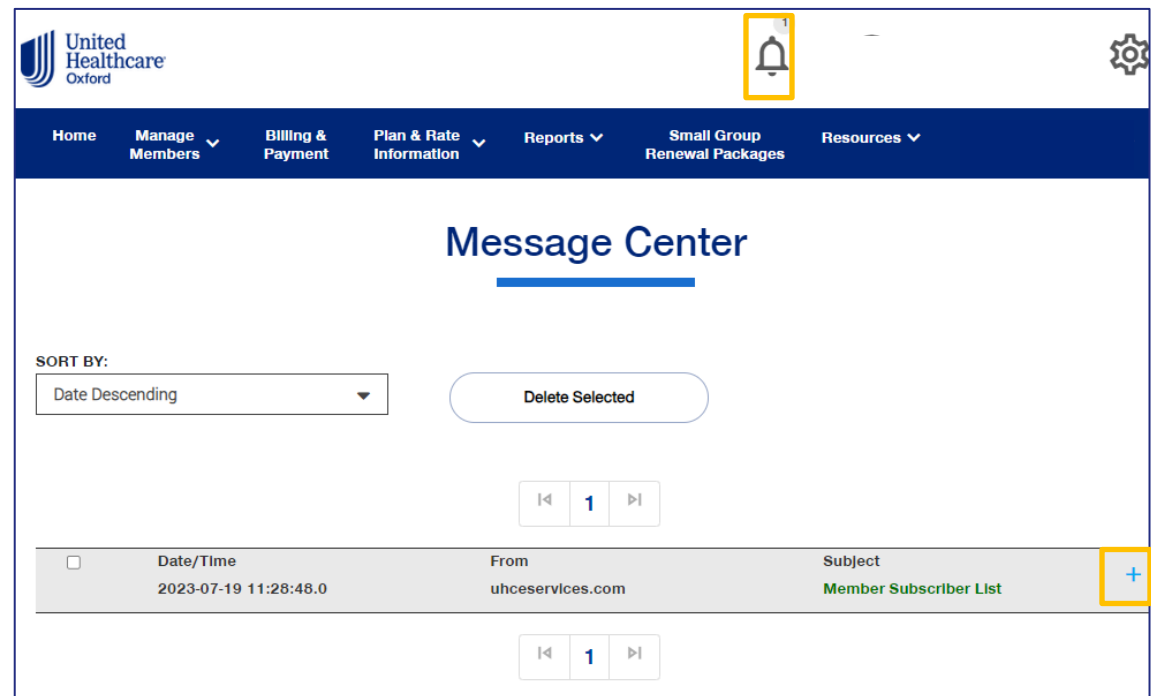
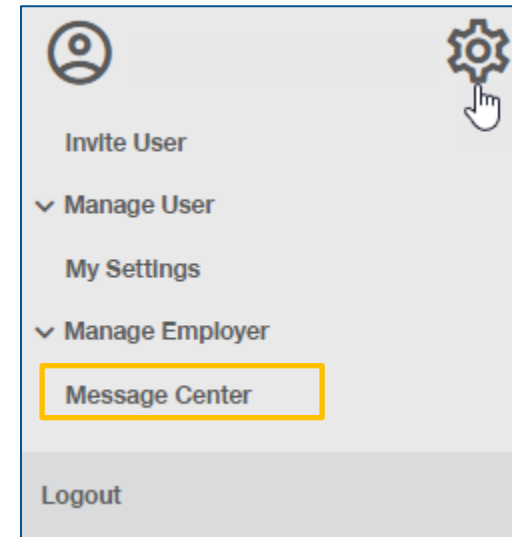


4 | Message Center

The **Message Center** displays messages and links to reports that have been generated.

The bell icon  at the top of the screen indicates the number of new messages or reports you have in the Message Center.

Note: To open a message in the Message Center, click the Plus sign and click the link to the report or message.



5 | 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).

Home

Small Group Quote & Renewals

Manage Members

Billing & Payment

Plan & Rate Information

Reports

Small Group Renewal Packages

Resources

Quick Links

Fully Insured

Small Group Renewal Packages

Out of Scope (DC, VT)

Upload Documents

MyAllSavers

UHC Benefit Services (COBRA)

Select Group



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.

The screenshot illustrates the 'Small Group Renewal Packages' interface. At the top, a 'Quick Links' menu contains 'Small Group Renewal Packages' (highlighted with a yellow box and labeled 1), 'Upload Documents', and 'MyAllSavers' with an external link icon. Below this, the 'Small Group Renewal Documents' section (labeled 1) displays a table of groups. The table has two rows: 'MILE' with ID '476' and 'PRO' with ID '476'. Each row has a blue plus sign icon in the right column (labeled 2). Clicking a plus sign leads to a detailed view of a group. In this view, the 'MIL' group is shown with 'INC.' as the company name, 'Group Number' as the identifier, and 'Renewal Date 12/01/2020'. A 'Renewal Document' link with a PDF icon is highlighted with a yellow box and labeled 3. At the bottom of this view, a message states 'No Groups available for renewal at this time.' in a yellow box.



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.**

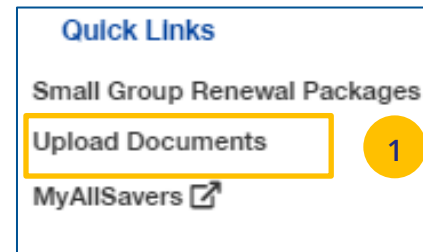
Note: **Upload Documents** is not applicable to **UnitedHealthcare HMO**.

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.

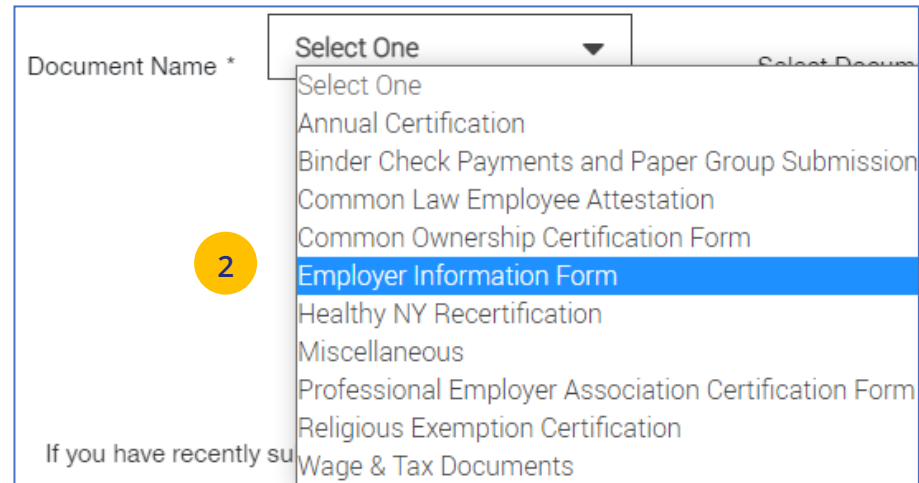
1. Click the **Upload Documents** link. The **Upload Documents** screen displays.




5 | Quick Links: Upload Documents (continued)

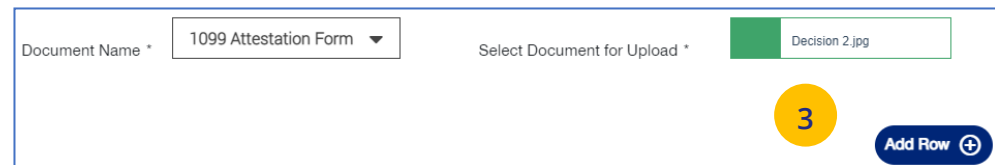
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2. Use the **Document Name** drop-down to select the document you need to upload.
3. Click the **Select Document for Upload** box and attach the document for upload. Repeat this if needed by clicking **Add Row**. You can upload up to five documents at one time.
4. Click **Upload**. A “successfully uploaded” confirmation message will display.



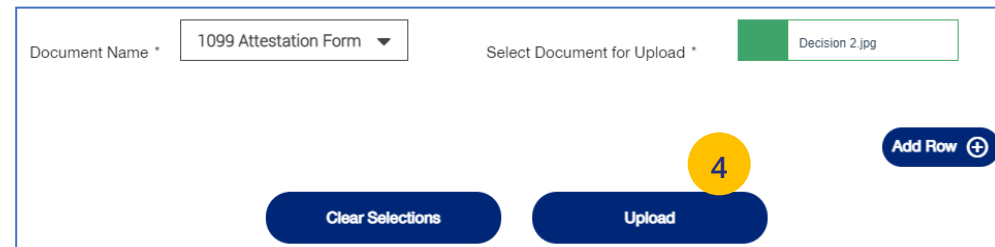
This screenshot shows the 'Document Name' dropdown menu. A yellow circle with the number '2' is placed next to the dropdown. The menu is open, displaying a list of document types. 'Employer Information Form' is highlighted in blue.

Document Name *
Select One
Select One
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
Wage & Tax Documents



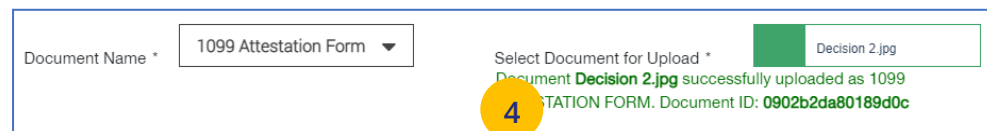
This screenshot shows the document selection interface. A yellow circle with the number '3' is placed next to the 'Select Document for Upload' box. The 'Document Name' dropdown is set to '1099 Attestation Form'. The 'Select Document for Upload' box shows a green thumbnail for 'Decision 2.jpg'. An 'Add Row' button is visible.

Document Name *	Select Document for Upload *
1099 Attestation Form	Decision 2.jpg



This screenshot shows the document selection interface. A yellow circle with the number '4' is placed next to the 'Upload' button. The 'Document Name' dropdown is set to '1099 Attestation Form'. The 'Select Document for Upload' box shows a green thumbnail for 'Decision 2.jpg'. A 'Clear Selections' button is also visible.

Document Name *	Select Document for Upload *
1099 Attestation Form	Decision 2.jpg



This screenshot shows the document selection interface after a successful upload. A yellow circle with the number '4' is placed next to the confirmation message. The 'Document Name' dropdown is set to '1099 Attestation Form'. The 'Select Document for Upload' box shows a green thumbnail for 'Decision 2.jpg'. The confirmation message reads: 'Document Decision 2.jpg successfully uploaded as 1099 ATTESTATION FORM. Document ID: 0902b2da80189d0c'.

Document Name *	Select Document for Upload *
1099 Attestation Form	Decision 2.jpg

Document Decision 2.jpg successfully uploaded as 1099 ATTESTATION FORM. Document ID: 0902b2da80189d0c

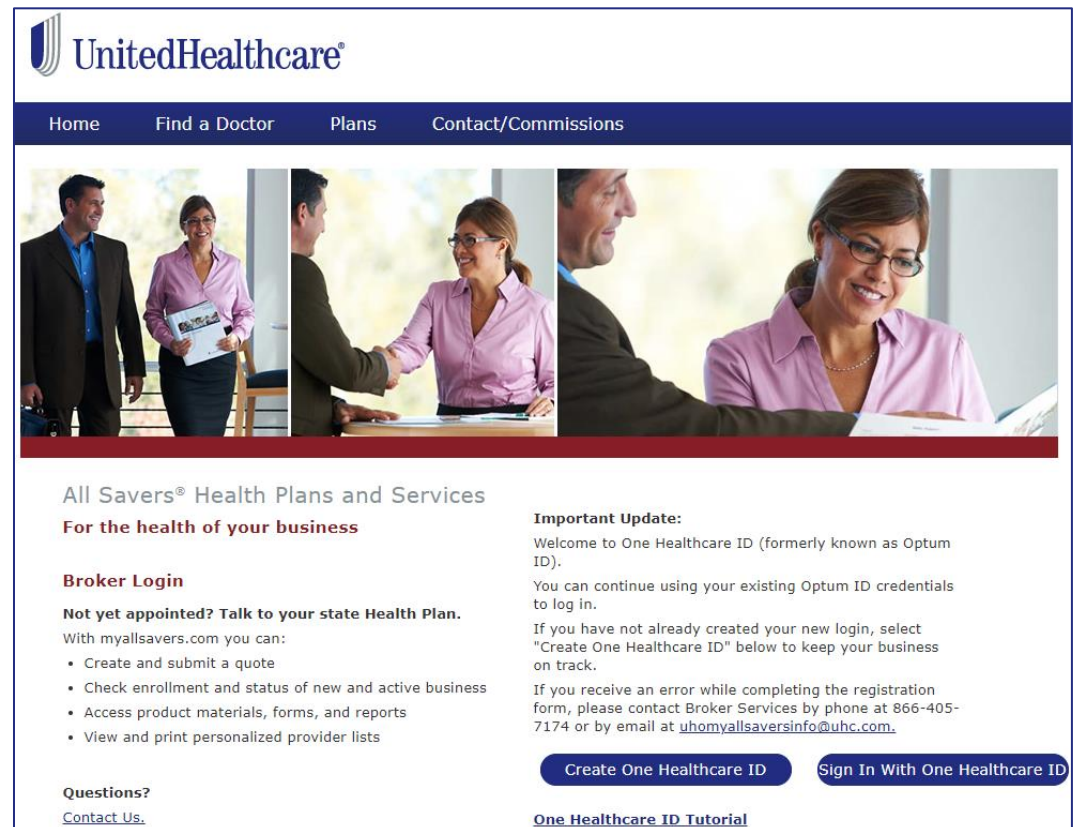
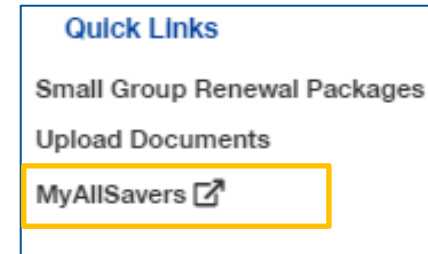


5 | Quick Links: MyAllSavers (Level Funded)

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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 **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.



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.

Quick Links

- Small Group Renewal Packages
- Upload Documents
- MyAllSavers
- UHC Benefit Services (COBRA)**

1

UnitedHealthcare®

2

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

Consumers

Billing Services:

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

Reimbursement Services:

Visit member.uhcbs.com to manage your account

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

Administrators

Billing Services:

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

Reimbursement Services:

Visit employer.uhcbs.com to manage your account

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

3

Billing Services Account Access

User Name

Forgot your User Name?

Password

Forgot your Password? / Register

LOGIN

OR

Login using

One Healthcare ID

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

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

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

If you already have a One Healthcare ID for **Employer Services**, please use those same log in credentials here.

[Register Now](#)

[Site Tour](#)

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

[Accessibility for Individuals with Disabilities](#)

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

[語言協助 / 不歧視通知](#)

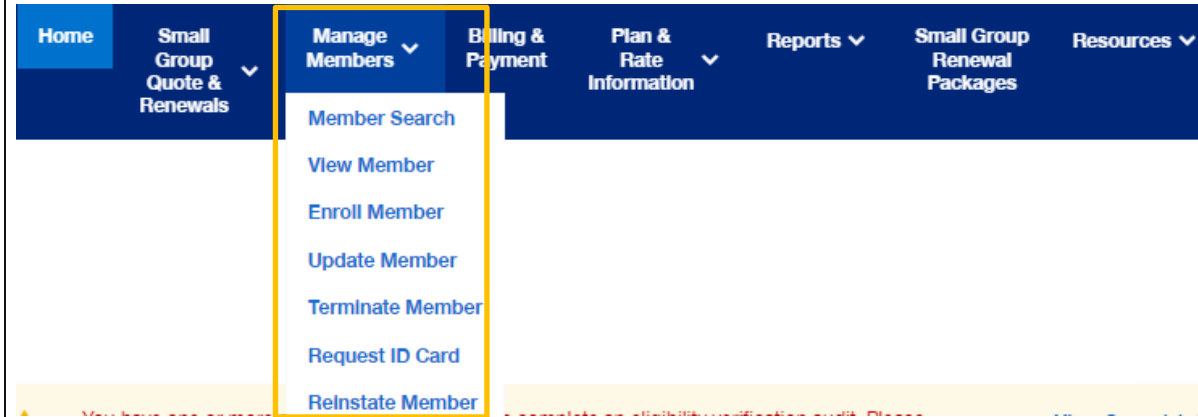


6 | Manage Members

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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

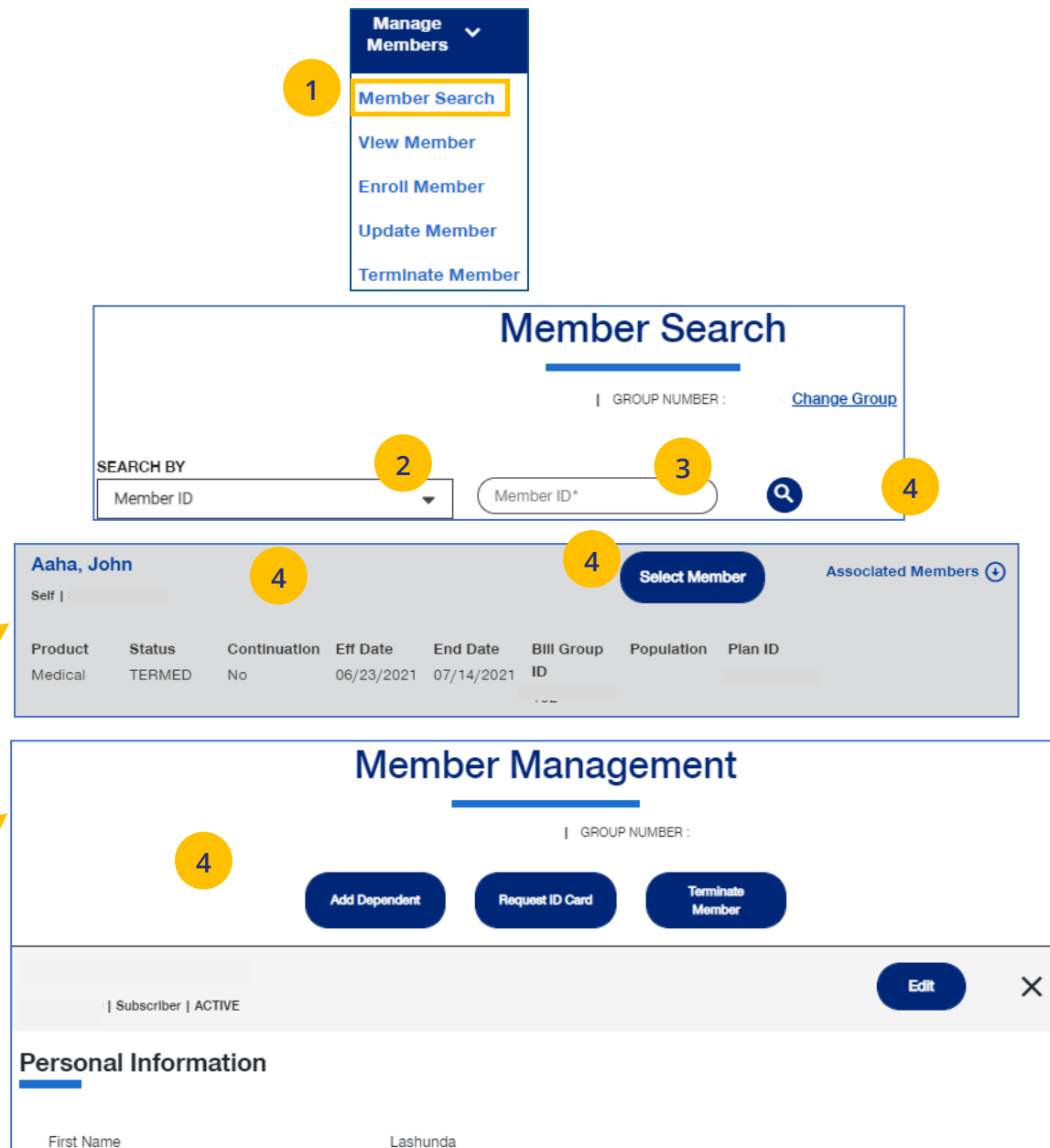
The **Member Search** and **View Member** tabs are used to search for a specific member record. **They both perform the same function.** You can search for a member using one of the following options:

- 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 image displays two screenshots of a web application interface, illustrating the process of searching for and managing a member. The top screenshot shows the **Member Search** screen, and the bottom screenshot shows the **Member Management** screen.

Member Search Interface:

- 1:** A dropdown menu labeled **Manage Members** is open, showing options: **Member Search** (highlighted), **View Member**, **Enroll Member**, **Update Member**, and **Terminate Member**.
- 2:** The **SEARCH BY** dropdown menu is set to **Member ID**.
- 3:** The **Member ID*** input field contains the text "Member ID".
- 4:** The **Search** icon (magnifying glass) is clicked.

Member Management Interface:

- 4:** The member's name, **Aaha, John**, is displayed.
- 4:** The **Select Member** button is clicked.
- 4:** The **Associated Members** link is visible.
- The table below shows member details:

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

Member Management Interface (Continued):

- 4:** The **Member Management** screen displays with detailed information on the member.
- The **Subscriber** status is **ACTIVE**.
- The **Personal Information** section shows the **First Name** as **Lashunda**.
- Buttons for **Add Dependent**, **Request ID Card**, and **Terminate Member** are visible.
- An **Edit** button and a close icon (X) are also present.

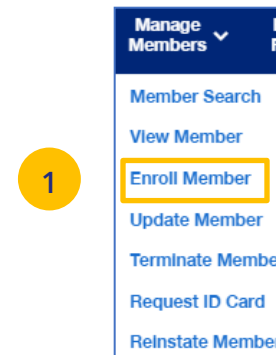


8 | Enroll Member

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.



Member Enrollment

GROUP NUMBER :

[View Group Information](#)
[Change Group](#)

Who are you enrolling?

New Member

Dependent
(Add to existing family)

Cancel


8 | Enroll Member: Demographics

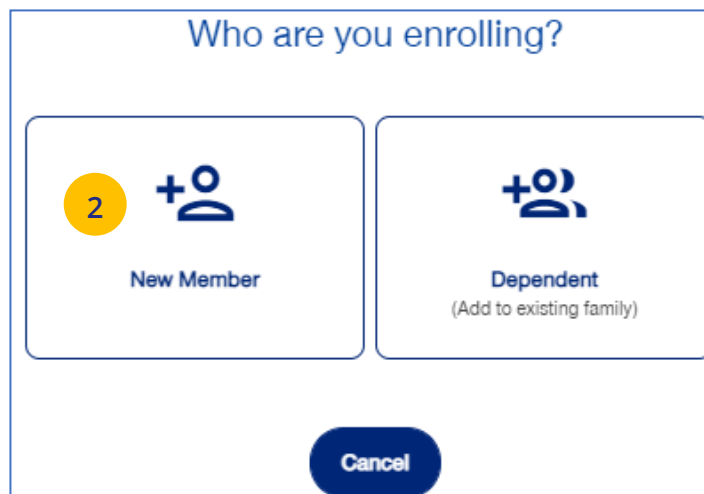
The enroll member process walks you through the **Demographics** and **Coverage** sections, then asks you to **Review & Submit** the new member information.

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.**

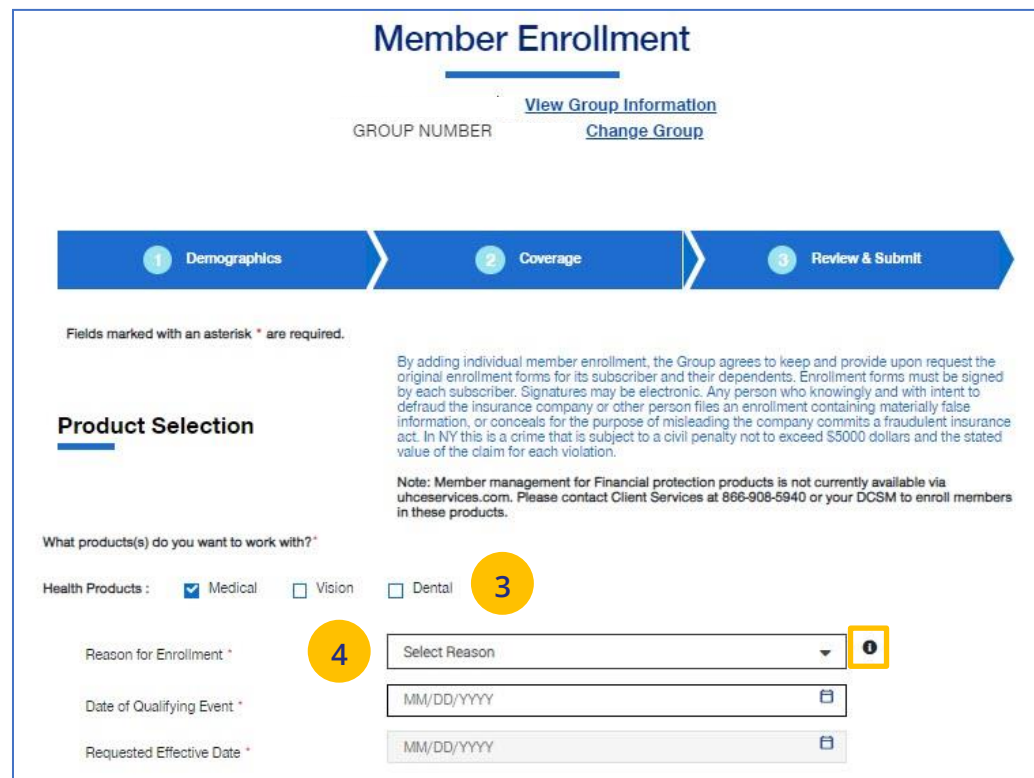


Who are you enrolling?

New Member

Dependent
(Add to existing family)

Cancel



Member Enrollment

[View Group Information](#)
GROUP NUMBER [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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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.

Product Selection

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 products(s) do you want to work with?*

Health Products : ☒ Medical

Reason for Enrollment *

Involuntary Loss of Coverage

Document upload option for Qualifying event available at Review & Submit page

Required Documents

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



8 | Enroll Member: Demographics (continued)

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. After enrollment is submitted, the system will

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.



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.

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

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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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 *	<input type="text" value="First Name"/>
Middle Name	<input type="text" value="Middle Name"/>
Last Name *	<input type="text" value="Last Name"/>
Suffix	<input type="text" value="Select Suffix"/>
Birth Date *	<input type="text" value="MM/DD/YYYY"/>
Gender *	<input type="text" value="Select Gender"/>
Social Security Number *	<input type="text" value="XXX-XX-XXXX"/> OR <input type="text" value="Select Reason SSN not Provided"/>
Date of Hire *	<input type="text" value="03/05/2022"/>
Employment Status	<input type="text" value="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 *	<input type="text" value="Address Line 1"/>
Home Address Line 2	<input type="text" value="Address Line 2"/>
Home Zip Code *	<input type="text" value="Zip Code"/>
Home City *	<input type="text" value="Home City"/>
Home State *	<input type="text" value="Select State"/>
Home Phone	<input type="text" value="(XXX) XXX-XXXX"/>
Work Phone	<input type="text" value="(XXX) XXX-XXXX"/>
Mobile Phone	<input type="text" value="(XXX) XXX-XXXX"/>
Preferred Phone	<input type="text" value="Select Phone"/>
Email Address	<input type="text" value="abc@xyz.com"/>

9



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 screenshot shows the 'Medical Information' section on the 'Coverage' step. At the top, there are three tabs: 'Demographics' (checked), '2 Coverage', and '3 Review & Submit'. Below the tabs, there is a 'Medical Information' header. A 'Yes' radio button is selected, and a 'No' radio button is unselected. Below this, there are two dropdown menus: 'PV' (Plan Variation) and 'RC' (Reporting Code). Both dropdown menus are currently set to 'Select PV' and 'Select RC' respectively. A 'Find Coverage' button is located at the bottom right of the section.

The screenshot shows the 'Medical Information' section on the 'Coverage' step. At the top, there are three tabs: 'Demographics' (checked), '2 Coverage', and '3 Review & Submit'. Below the tabs, there is a 'Medical Information' header. A 'Yes' radio button is selected, and a 'No' radio button is unselected. Below this, there are two dropdown menus: 'PV' (Plan Variation) and 'RC' (Reporting Code). Both dropdown menus are currently set to '0005 - NON-UNION_1'. A 'Find Coverage' button is located at the bottom right of the section. Below the 'Find Coverage' button, there are three more dropdown menus: 'Billing Group' (set to '1193101-BILLGROUP'), 'Plan' (set to 'Select Plan'), and 'Provider Type' (set to 'Select Provider Type'). A 'Provider Location ID' field is also present, with a 'Find Provider' button next to it.



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: 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 +**”

✓ 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

Edit

Document Upload

2 **Document List** for Qualifying Events

Required Documents

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 recent and include names and home addresses of both parties. Certificate from church is not acceptable documentation.
Legal Guardianship	Court-issued Guardianship Order
Court or Administrative Order or support	Qualified Domestic Child Support Court Order filed with court 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 or domestic partnership, or document required by each state if required to be registered, or document required by each state if required to be registered.

3 Document Name

Involuntary Loss of Coverage

Select One

Birth

Adoption

Marriage

Legal Guardianship

Court or Administrative Order

Domestic Partner

Involuntary Loss of Coverage

New Hire

Medicaid Redetermination

4 Select Document for Upload

No file chosen...

5 Add More +

Selections

Upload

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

Submit



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

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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.

✓ Demographics

✓ Coverage

3 Review & Submit

Product Selection

Edit

Health Products :

Reason for Enrollment

Adoption

Date of Qualifying Event

05/20/2024

Requested Effective Date

05/20/2024

agbz xgnbcv

Subscriber | ACTIVE

+

argafdg aedr

Child | ACTIVE

+

xgftdhsfgh stht

Child

×

Demographics

Edit

Dependent

Type of Dependent

Child

First Name

xgftdhsfgh

Middle Name

Last Name

stht




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


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- Review the information. If edits are needed on any of the information shown, click **Edit**.
- 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.

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

02604147000 | 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

Edit

6

Coverage

Edit

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.

Submit


7

Enrollment Status

John Sweetwater

Subscriber

Medical Information

 **Member Enrollment is successful!**


6 | Update Member

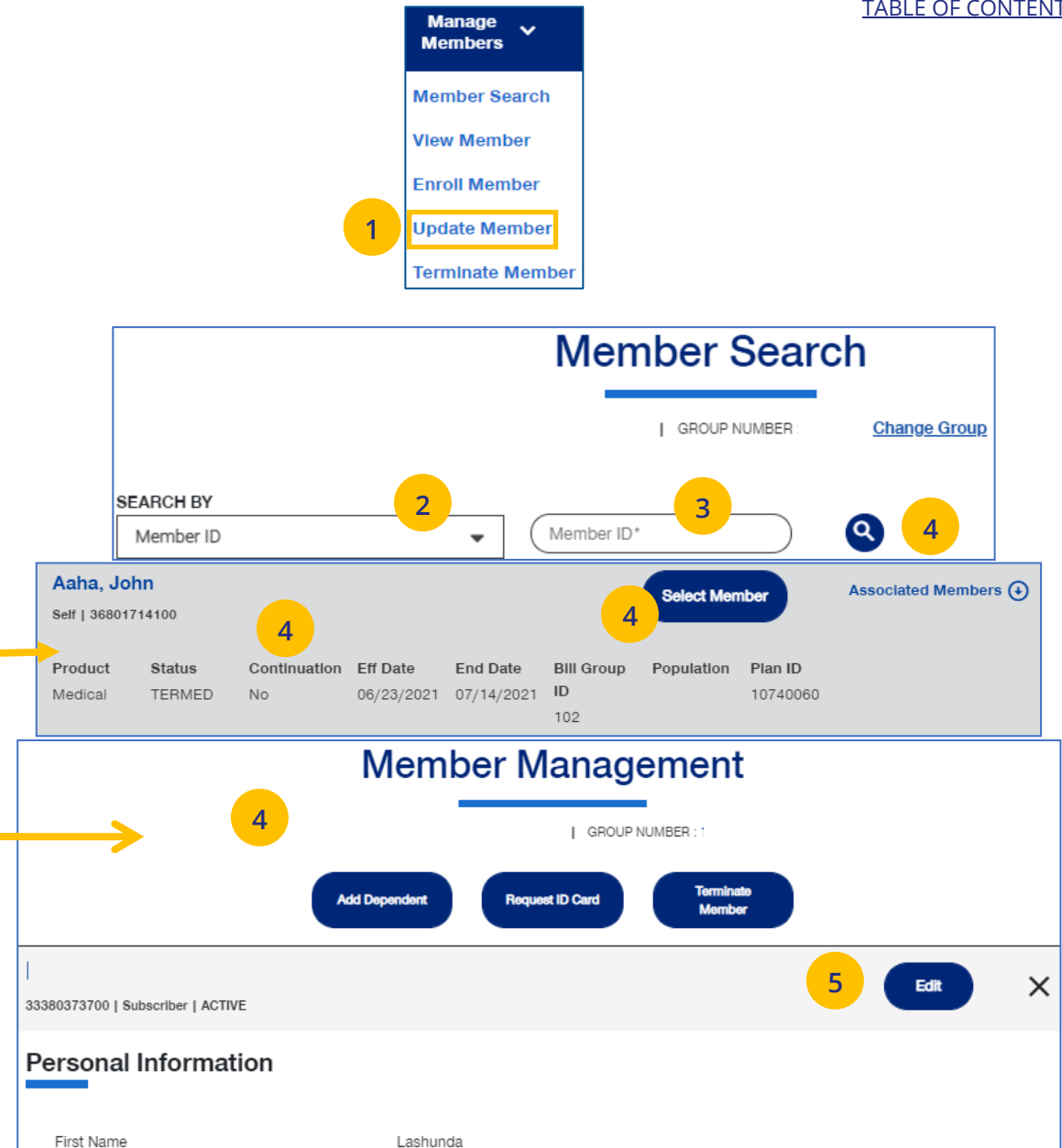
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Update Member is used to search for and edit a specific member record. You can search for a member using one of the following options:

- 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 process of updating a member. It shows the 'Manage Members' dropdown menu with 'Update Member' highlighted (1). The 'Member Search' section includes a 'SEARCH BY' dropdown set to 'Member ID' (2), a search input field with 'Member ID*' (3), and a search icon (4). Below the search results, a table lists member details for 'Aaha, John'. A 'Select Member' button (4) is next to the member's name. The 'Member Management' section shows buttons for 'Add Dependent', 'Request ID Card', and 'Terminate Member'. At the bottom, the 'Personal Information' section is visible, showing the member's first name 'Lashunda' and an 'Edit' button (5).

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



6 | Update Member (continued)

[TABLE OF CONTENTS](#)

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

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

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

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

Member Update

| GROUP NUMBER : 1

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



6 | Update Member (continued)

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- 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.

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

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.

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

✓ Demographics 2 Coverage 3 Review & Submit

Updates saved successfully.
Fields marked with an asterisk * are required.

Subscriber | ACTIVE

Coverage Effective Date

Requested Effective Date MM/DD/YYYY

Medical Information

Would you like to change to this coverage? Yes No

Billing Group *

Plan *

Provider Effective Date MM/DD/YYYY

Provider Type

Provider Location ID Find Provider

Add Additional Provider

Cancel or Exit Previous 9 Save & Continue

Submit

10



Changes submitted successfully




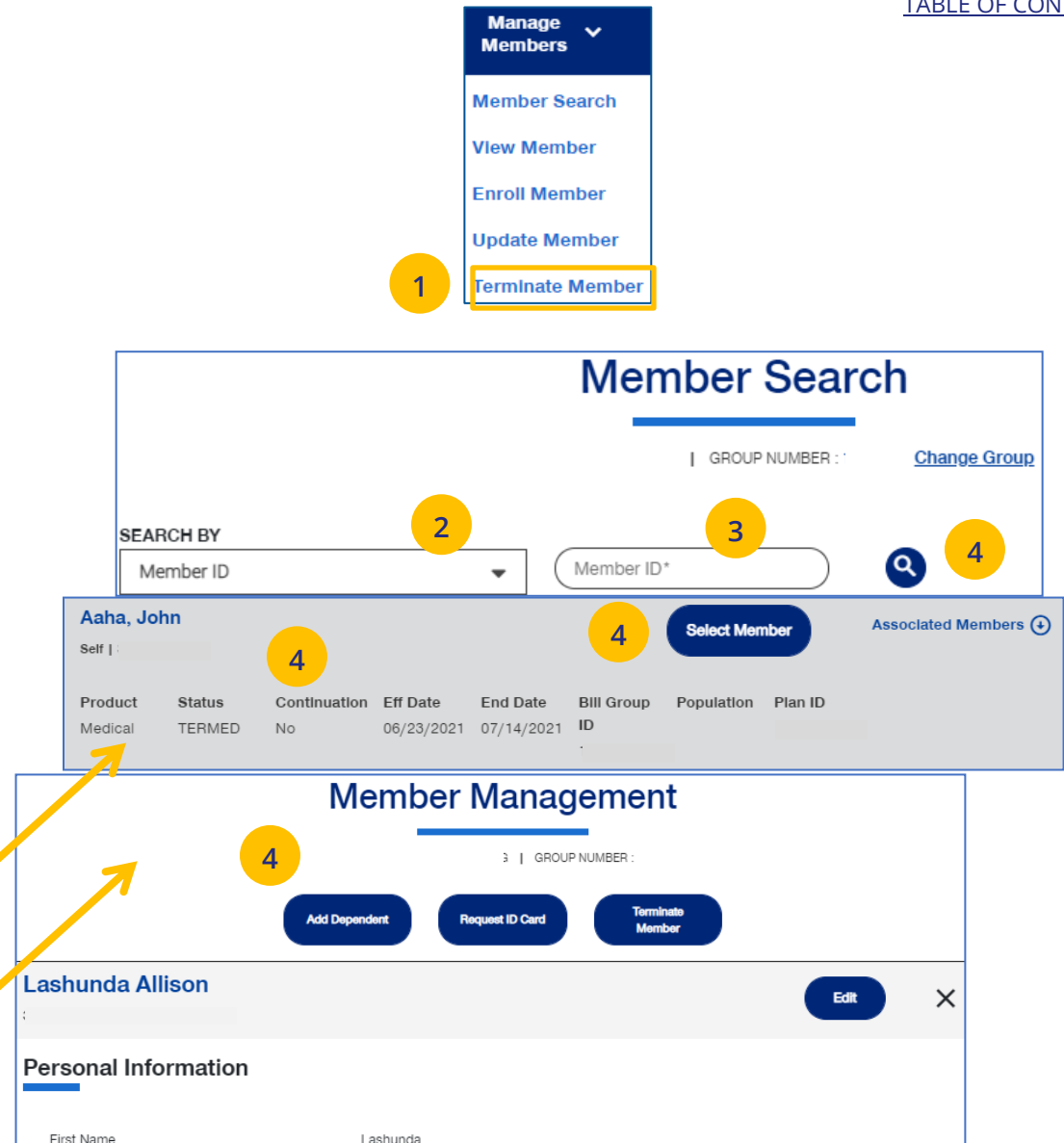
6 | Terminate a Member's Coverage

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.



The screenshot illustrates the process of terminating a member's coverage. It shows two main sections: **Member Search** and **Member Management**.

Member Search:

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

Member Management:

- 4:** The "Select Member" button is clicked.
- The member's name "Aaha, John" is displayed.
- The "Self" dropdown is set to "Self".
- A table displays member details:

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

Member Management (Lashunda Allison):

- 4:** The "Add Dependent", "Request ID Card", and "Terminate Member" buttons are visible.
- The member's name "Lashunda Allison" is displayed.
- The "Edit" button is visible.
- The "Personal Information" section is expanded, showing the "First Name" field with the value "Lashunda".


6 | Terminate a Member's Coverage (continued)

[TABLE OF CONTENTS](#)

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

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](#)

Waiting Period Rules

 8 [X](#)

- 972427 : MILESTONES BEHAVIORAL SERVICES INC.
Termination will be effective on the last day of the month of the qualifying termination event.



6 | 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 select all dependents for termination also.

Member Information

Multiple selections are allowed. Please select each applicable row.

John Doe Subscriber Male	Member ID 70514124400	Date of Birth 01/01/1972	Effective Date 04/01/2020	Status ACTIVE	Select <input checked="" type="checkbox"/> Medical
Jane Doe Spouse Female	Member ID 70514124401	Date of Birth 02/01/1972	Effective Date 04/01/2020	Status ACTIVE	Select <input checked="" type="checkbox"/> Medical
Jonathan Doe Child Male	Member ID 70514124402	Date of Birth 07/19/2001	Effective Date 04/01/2020	Status ACTIVE	Select <input checked="" type="checkbox"/> Medical
Janet Doe Child Female	Member ID 70514124403	Date of Birth 08/11/2006	Effective Date 04/01/2020	Status ACTIVE	Select <input checked="" type="checkbox"/> Medical
Jack Doe Child Male	Member ID 70514124404	Date of Birth 08/08/1998	Effective Date 04/01/2020	Status ACTIVE	Select <input checked="" type="checkbox"/> Medical

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

CancelNext




6 | Terminate a Member's Coverage (continued)

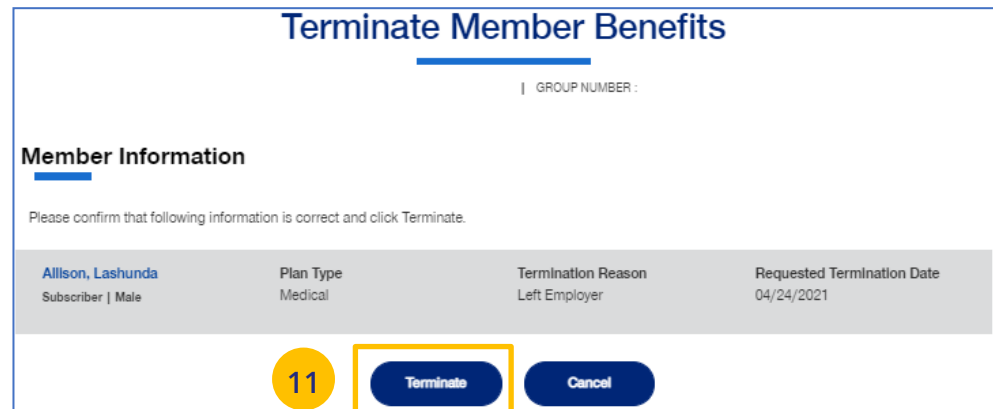
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11. Click **Terminate**. A message displays telling you the member has been terminated successfully.

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).



Terminate Member Benefits

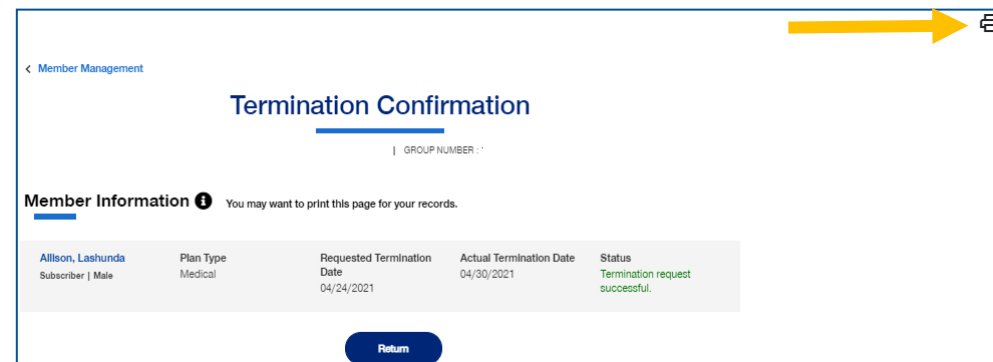
| GROUP NUMBER :

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
--	----------------------	-------------------------------------	--

11 **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.
--	----------------------	--	---------------------------------------	---

Return




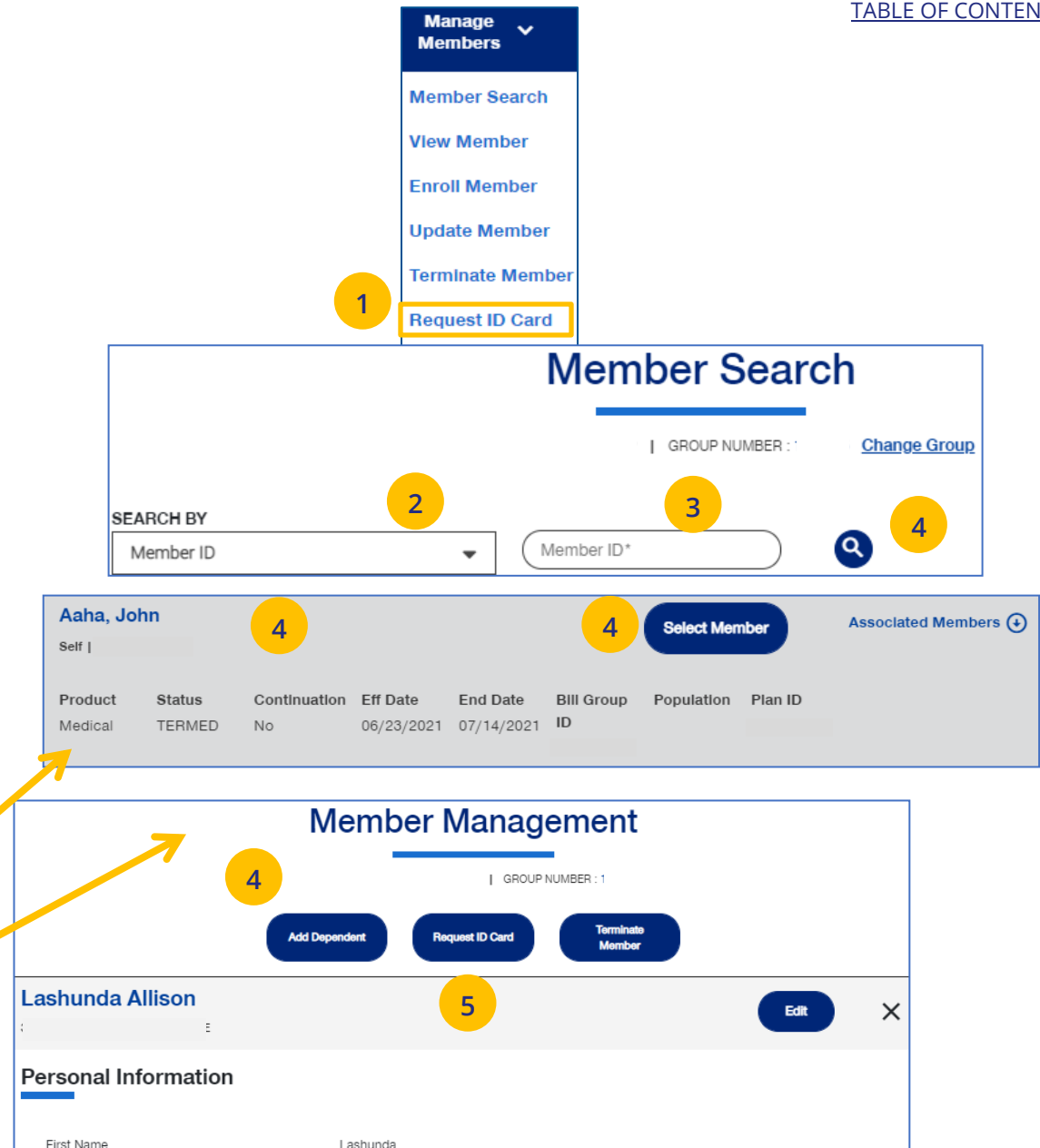
6 | Request a Health Plan ID Card

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**.



The screenshot illustrates the process of requesting a health plan ID card. It is divided into two main sections: **Member Search** and **Member Management**.

Member Search Section:

- A sidebar menu on the left contains the **Manage Members** dropdown, with **Request ID Card** highlighted (labeled 1).
- The main area has a **Member Search** header and a **GROUP NUMBER : 1** indicator with a **Change Group** link.
- The **SEARCH BY** dropdown is set to **Member ID** (labeled 2).
- The search input field contains **Member ID*** (labeled 3).
- A **Search** icon (magnifying glass) is on the right (labeled 4).

Member Management Section:

- The top row shows the member's name **Aaha, John** (labeled 4), a **Select Member** button (labeled 4), and an **Associated Members** link.
- Below the name is a table with the following data:

Product	Status	Continuation	Eff Date	End Date	Bill Group	Population	Plan ID
Medical	TERMED	No	06/23/2021	07/14/2021	ID		
- The **Member Management** header includes **GROUP NUMBER : 1** and three buttons: **Add Dependent**, **Request ID Card** (labeled 4), and **Terminate Member**.
- The member's name **Lashunda Allison** is displayed (labeled 5) next to an **Edit** button and a close icon.
- The **Personal Information** section shows the **First Name** as **Lashunda**.

6 | 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.

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

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

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

<input checked="" type="radio"/>	John Doe Subscriber
<input type="radio"/>	Jane Doe Spouse
<input type="radio"/>	Jonathan Doe Child
<input type="radio"/>	Janet Doe Child
<input type="radio"/>	Jack Doe Child

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

Request sent successfully.



6 | 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.




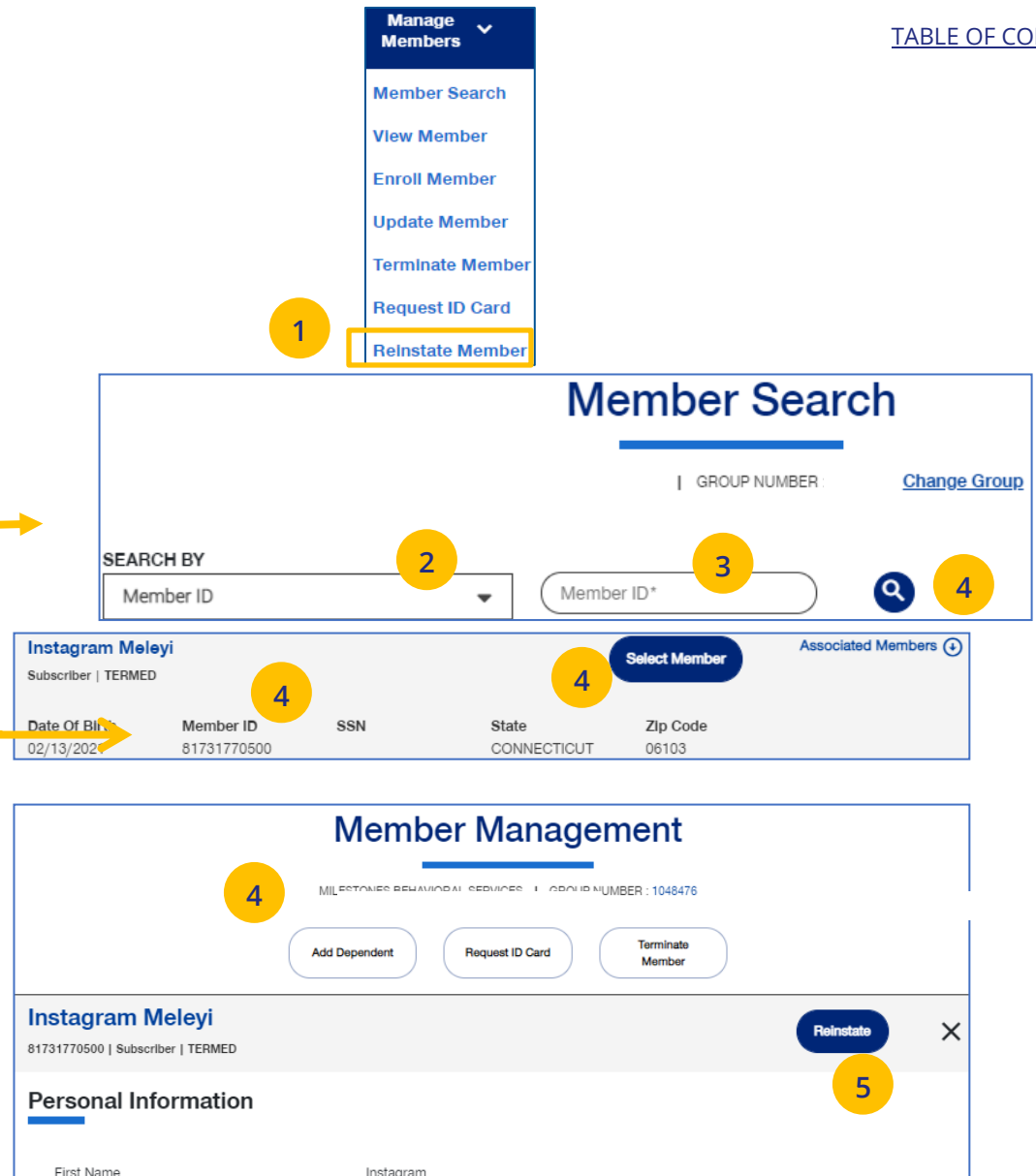
6 | Reinstate Member

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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.



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 labeled "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 "Select Member" button is clicked on the search results card for "Instagram Meleyi".
- 5:** The "Reinstate" button is clicked in the "Member Management" screen.

Member Search Results Card (Instagram Meleyi):

Date Of Birth	Member ID	SSN	State	Zip Code
02/13/2024	81731770500		CONNECTICUT	06103

Member Management Card (Instagram Meleyi):

81731770500 | Subscriber | TERMED

Personal Information

First Name	Last Name
Instagram	



6 | Reinstate Member (continued)

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

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

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

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

Reinstate Member

GROUP NUMBER : 1

1 Demographics 2 Coverage 3 Review & Submit

Reason For Enrollment

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

Reason for Enrollment * **6** 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

7

Cancel Save and Continue



6 | 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.

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

Would you like to change to 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.



7 | 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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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**.

The image shows two screenshots of a web application interface. The top screenshot is the 'Billing & Payment' screen. It has a dark blue navigation bar at the top with links: 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, and Resources. The main content area has the title 'Billing & Payment' and a 'GROUP NUMBER' field with a 'Change Group' link. Below this is the 'Amount Due: \$31,702.48'. At the bottom, 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). The bottom screenshot is the 'Select Payment Options' screen. It shows the 'Amount Due: \$31,702.48'. Below this is the 'Payment Method' dropdown menu set to 'Operating', with an 'Add Payment Method' link. The 'Date' field is set to '06/06/2022'. At the bottom, there is a 'Cancel' button and a 'Review & Submit' button (highlighted with a yellow box and a yellow circle with the number 2).

Home Small Group Quote & Renewals Manage Members **Billing & Payment** 1 & Information Reports Small Group Renewal Packages Resources

Billing & Payment

GROUP NUMBER : [Change Group](#)

1

Amount Due: **\$31,702.48**

[Go to Billing Home](#) **Pay as Billed** 2

Select Payment Options

Amount Due: **\$31,702.48**

Payment Method: Operating [Add Payment Method](#)

Date: 06/06/2022 [2](#)

[Cancel](#) **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.

Review Payment Details

Payment Method	Amount	Date
Operating	\$31,702.48	06/06/2022

Back

3

Submit Payment

Payment Confirmation

✓

Thank you for your payment!

3

Your payment information has been scheduled successfully. The confirmation number for this payment is 635958511626. Please click Confirmation PDF to save a record of this payment.

For all other billing needs or to manage payment methods, [click here](#) to see other billing options.

Group Name: MID ISLAND Y JCC

Group Number: 1373201

Confirmation PDF

Total Payment: \$31,702.48

Confirmation Number: 635958511626

Payment Account: Operating

Payment Submitted Date: 06/06/2022

Payment Date: 06/06/2022

Invoice Date	Invoice Number	Due Date	Bill Group	Total Amount Due	Amount Paid	Reason Code
04/07/2022	154855369949	05/01/2022	1030101	\$31,702.48	\$31,702.48	Pay as billed



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.

Home

Small Group Quote & Renewals

Manage Members

Billing & Payment

1 & Information

Reports

Small Group Renewal Packages

Resources

Billing & Payment

| GROUP NUMBER : [Change Group](#)

1

Amount Due: \$31,702.48

2

[Go to Billing Home](#)

Pay as Billed

InvoicesPayment HistoryPayment MethodNotificationsBill vs PaidHelpSystem Alerts0

Account Summary

Customer NameMID ISLAND Y.JCCBilling Customer Number1373201

Last Payment Rec'd04/04/2022

Last Payment Amount\$31,702.48

Next Payment Due Date06/06/2022

Next Payment Amount\$31,702.48

Current Balance ⓘ\$31,702.48

Open Invoice Listing

Closed Invoice Listing

> Filter by No filter applied

2

Make Payment

Rows per page100Row Count: 1

PreviousPage1of1Next

☐ Select All

Pay	Invoice Date ↑↓	Invoice Number ↑↓	Due Date ↑↓	Policies	Bill Group ↑↓	Invoice Type ↑↓	Payment(s) Pending	Adjustment(s) Pending	Amount	Outstanding Balance
<input type="checkbox"/>	04/07/2022	154855369949	05/01/2022	336426	1030101	List	Yes	No	\$31,702.48	\$31,702.48
Total									\$31,702.48	\$31,702.48

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	\$0.00	\$31,702.48	\$0.00	\$0.00	\$0.00	\$31,702.48

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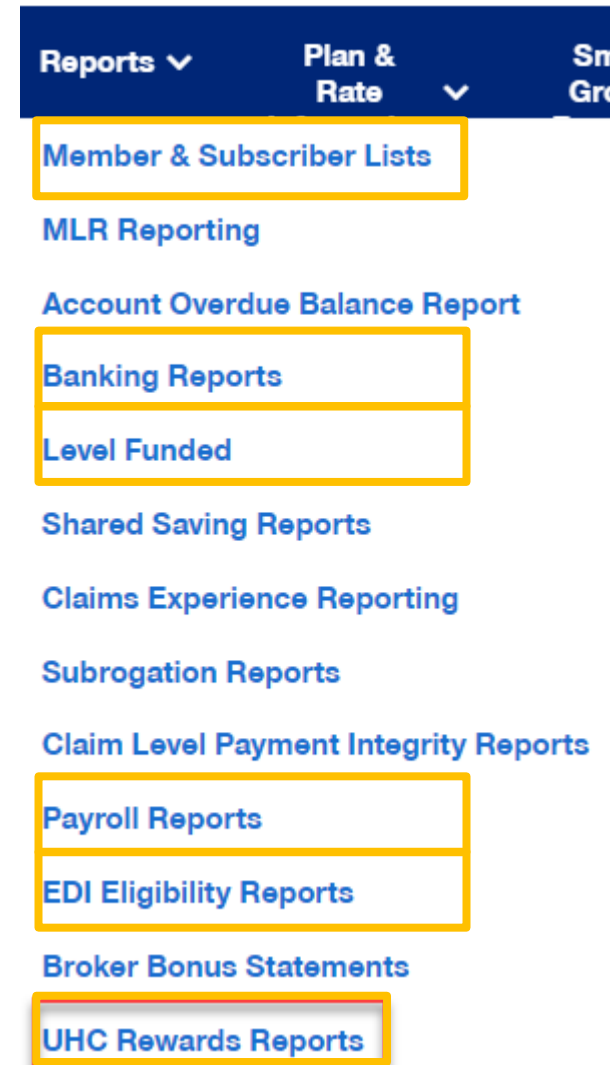
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8 | Reports

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

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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.

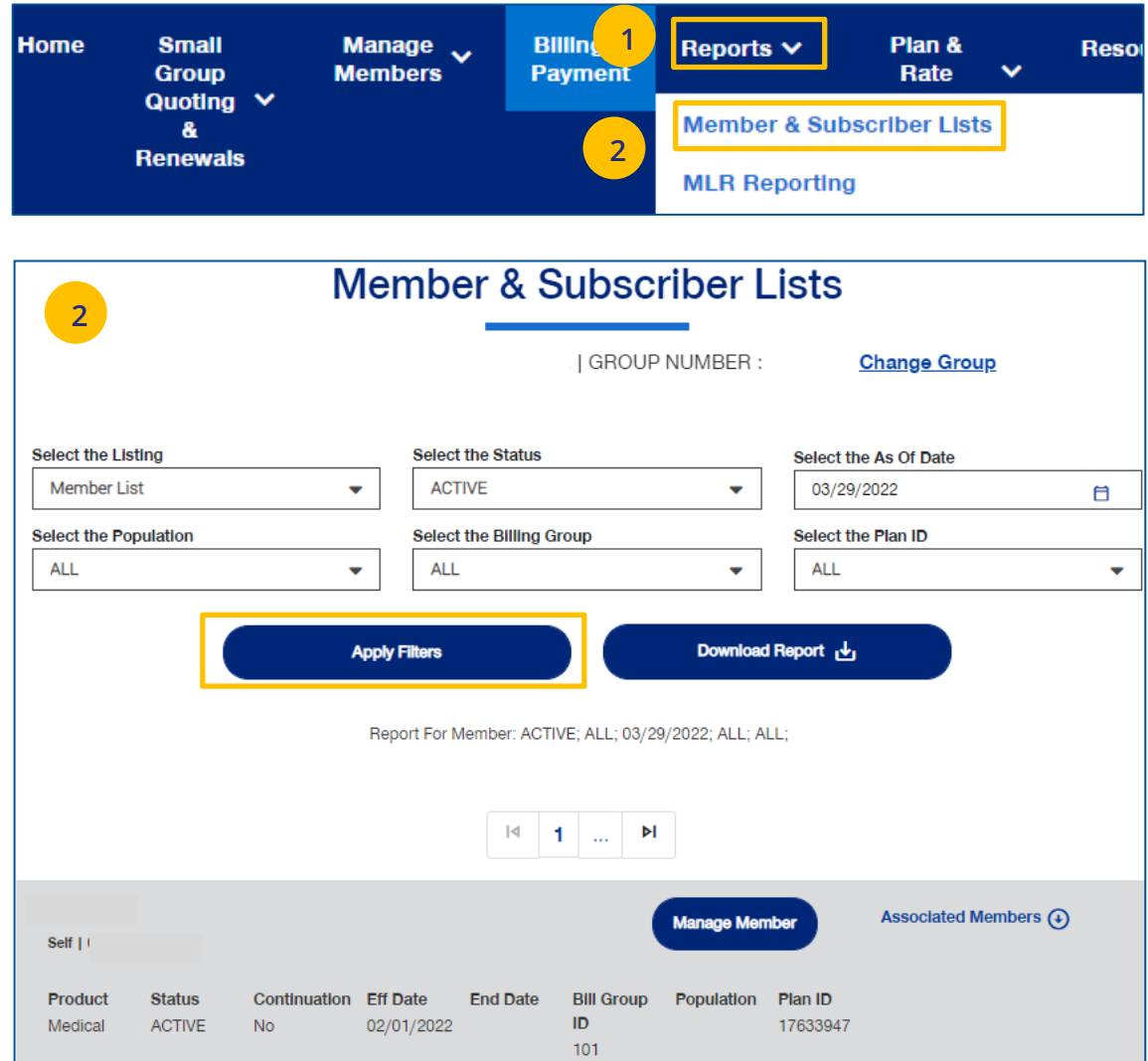
Note: **Member List** is the default and the default report will be shown when the screen displays. Just scroll down to view members in the report who met the default search criteria.

Note: The **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, 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 Quoting & Renewals Manage Members Billing Payment **1** Reports Plan & Rate Resources

2 Member & Subscriber Lists MLR Reporting

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



8 | Member & Subscriber Lists (continued)

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.

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

3

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



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.

United Healthcare

4

2

Message Center

SORT BY:

Date Descending

Delete Selected

I<

1

I>

Date/Time

2021-03-01 09:09:15.0

From

SYSTEM

Subject

Member Subscriber List

5

+

Date/Time

2021-03-01 09:09:15.0

From

SYSTEM

Subject

Member Subscriber List

X

To:

Ignacio2

From:

SYSTEM

Date:

2021-03-01 09:09:15.0

Message Expiration Date:

2021-06-01 09:09:17.0

Subject:

Member Subscriber List

Attachments and Links:

MembersListReport.xlsx

Message:

6



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.

The screenshot shows the 'Banking Reports' interface. At the top, a navigation bar includes 'Home', 'Small Group Quoting & Renewals', 'Manage Members', 'Billing Payments', 'Reports' (highlighted with a yellow box and callout 1), 'Plan & Rate', and 'Resources'. The 'Reports' dropdown menu is open, showing 'Member & Subscriber Lists', 'MLR Reporting', 'Account Overdue Balance Report', and 'Banking Reports' (highlighted with a yellow box and callout 2). Below the navigation bar, the 'Banking Reports' section is titled 'Banking Reports' and includes a 'GROUP NUMBER ::' field with a 'Change Group' link. A callout 2 points to this section. Below the title, a message states 'To view a banking report, Select from the report listed below.' The interface 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: 'Charge Claim Activity' (last updated 2020-12-14) and 'Funding Advice' (last updated 2020-12-08). The 'File Link' column for 'Charge Claim Activity' is highlighted with a yellow box and callout 3. The 'Monthly Banking Reports' section shows 'No reports found'. The 'Historical Banking Reports' section is currently empty. At the bottom, there are two dropdown menus: 'Select the Report *' (set to 'Aged Outstanding') and 'Select the Date Range' (set to '12/14/2020 - 12/14/2020'), followed by an 'Apply' button.

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



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.

Select the Report *

Select the Date Range

12/15/2020 - 12/15/2020

Apply

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



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.

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 Renewal Packages', and 'Resources'. Below the navigation bar, a sub-menu shows 'Banking Reports' and 'Level Funded' (highlighted with a yellow box and callout 2). The main section is titled 'Level Funded Reports' and includes a 'GROUP NUMBER' field with links for 'View Group Information' and 'Change Group'. Below this, there are three expandable report sections: 'Monthly Executive Summary' (with a plus sign), 'IRS Documents 6055' (with a plus sign), and 'IRS Documents 1095B' (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 lists three reports: 'FINAL', 'EARLY TERM', and 'ANNUAL'. The 'File Link' column for each report contains a document icon and a link (highlighted with a yellow box and callout 3). A yellow arrow points from the text 'Early Term, Annual and Final reports' in the instructions to the 'Reconciliation Reports' section.

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



8 | EDI Eligibility Reports

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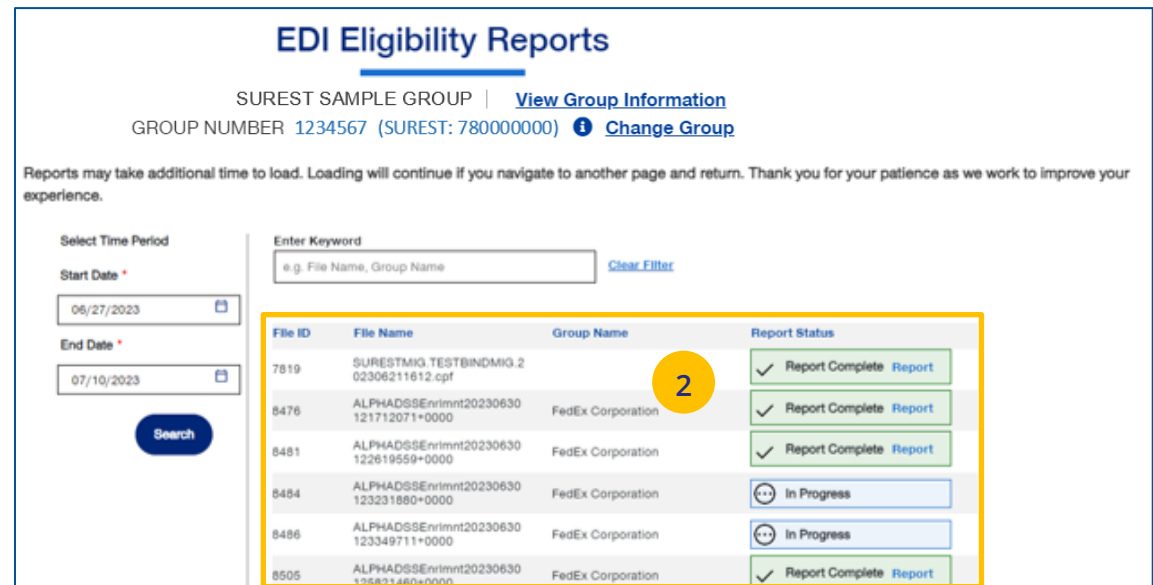
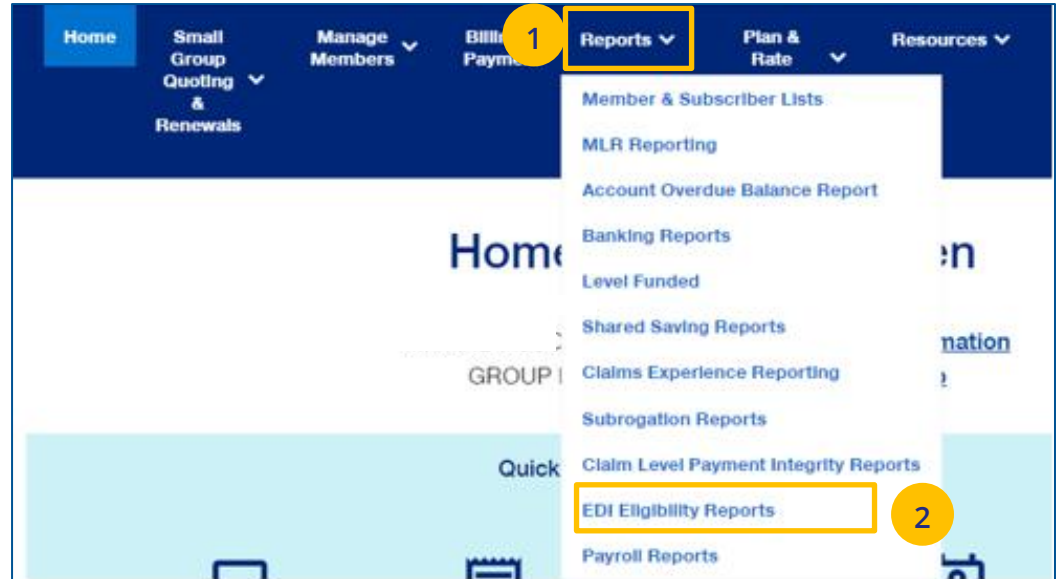
The **EDI Eligibility Reports** are for groups that submit their eligibility data electronically to UnitedHealthcare. The report shows the results of the data load.

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.



8 | 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	ALPHADSSEnrnmnt20230630 121712071+0000	FedEx Corporation	✓ Report Complete Report
8481	ALPHADSSEnrnmnt20230630 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 Hinote	1968-01-01	Subscriber	Added
James Gretz	1972-01-01	Subscriber	Added



8 | 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 Quoting & Renewals Manage Members ^ B 1 Reports Plan & Rate Resource




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

SEARCH BY
Member ID

Payroll Reports 2

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	3 
HCL SEMI-MONTHLY2 - 24 - SALARIED	03/24/2023	03/26/2023	
HCL SEMI-MONTHLY1 - 24 - HOURLY	02/28/2023	03/01/2023	

Employer Name:	Surestmar09	Employer GI 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	8332	Coverage	50.00	01/31/2023	450.00	9	6



8 | UHC Rewards Reports

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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.

1 Reports ▾ Plan & Rate ▾ Sm Gro

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

Payroll Reports

EDI Eligibility Reports

Broker Bonus Statements

2 UHC Rewards Reports

UHC Rewards Reports

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

Quarterly UHC Rewards Reports		
Quarterly Report Jan - Mar 2024	Last Updated 01/11/2024	File Link 3
Quarterly Report Jan - Mar 2024	Last Updated 01/11/2024	File Link
Quarterly Report Oct - Dec 2023	Last Updated 10/06/2023	File Link
Quarterly Report Jul - Sept 2023	Last Updated 07/06/2023	File Link



9 | Plan & Rate Information

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.

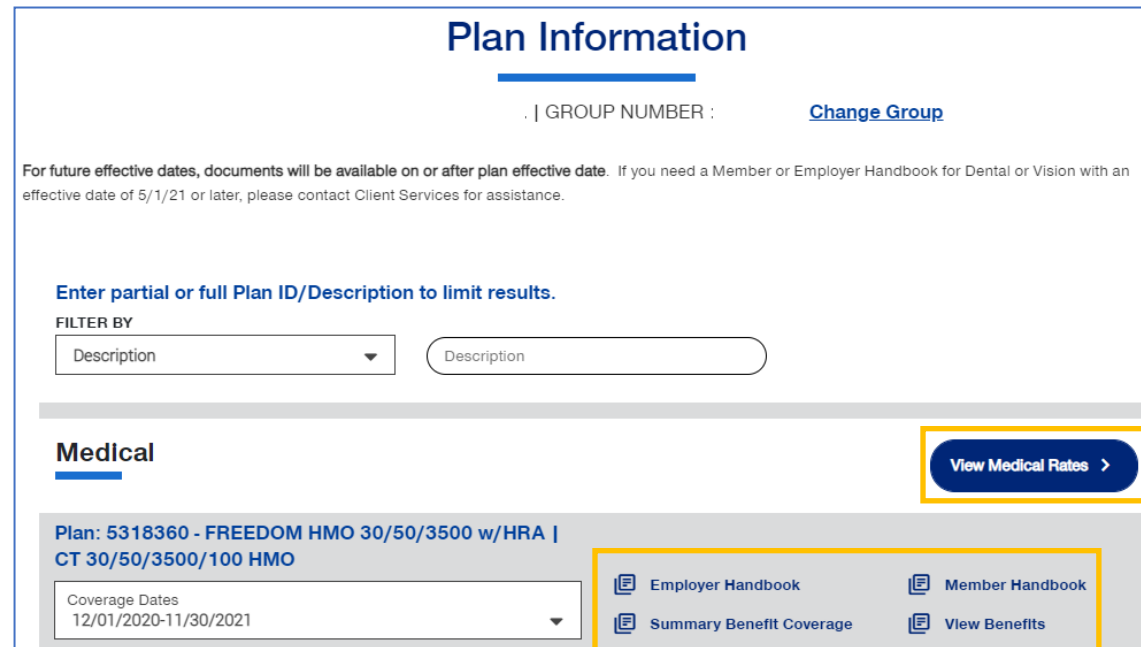
To View Plan Information:

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.

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9 | Plan & Rate Information

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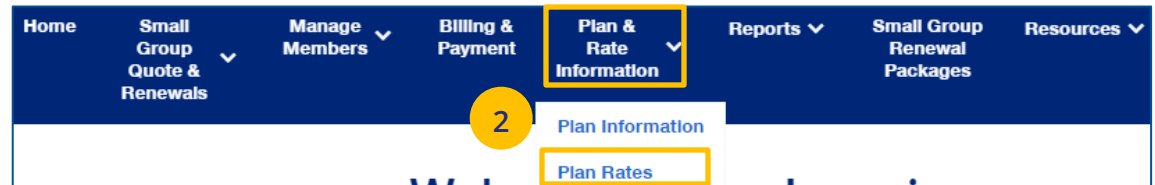
To View Medical, Vision and Dental Rates:

- 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.

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



[< Select Plan](#)

Plan Rates

Show Rates for Effective Date:

All Dates

☐ All Dates

☐ 05/01/2021

☐ 01/01/2022

Download PDF

Print All Rates

Medical Plans

Dental Plans

Vision Plans

Rates Effective 01/01/2022

Plan: 12527295 OPTION 3 NY G MTRO GT 25/40/1250/80 EPO 22		Plan: 7755086 OPTION 1 NY G LBTY NG 25/50/100 EPO ZD 22		Plan: 12608209 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



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.

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[Select Plan](#)

View Benefits

GROUP NUMBER : [Change Group](#)

Plan Information

PLAN ID : 10049669 - ALL ELIGIBLE | HP4000
Effective Dates : 12/01/2020-11/30/2021

Apply

Benefits ☒ Programs ☐

ALL A B C D E F G H I J K L M N O P Q R S T U V W X Y Z

OR

Search for benefits

3D Mammogram

3D Mammogram Professional Component

Accidental Dental



9 | 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 Resources

Plan & Rate 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: 4810705 - CT FREEDOM 15/30/0/100 ACCESS

Coverage Dates
12/01/2022-11/30/2023

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



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.

Home

Small Group Quote & Renewals

Manage Members

Billing & Payment

Plan & Rate Information

Reports

Small Group Renewal Packages

Resources

Plan & Rate 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: 4810705 - CT FREEDOM 15/30/0/100 ACCESS

Coverage Dates

12/01/2022-11/30/2023

Employer Handbook

Member Handbook

Summary Benefit Coverage

View Benefits

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9 | 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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Home

Small Group Quote & Renewals

Manage Members

Billing & Payment

Plan & Rate Information

Reports

Small Group Renewal Packages

Resources

Plan & Rate 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: 4810705 - CT FREEDOM 15/30/0/100 ACCESS

Coverage Dates

12/01/2022-11/30/2023

Employer Handbook

Member Handbook

Summary Benefit Coverage

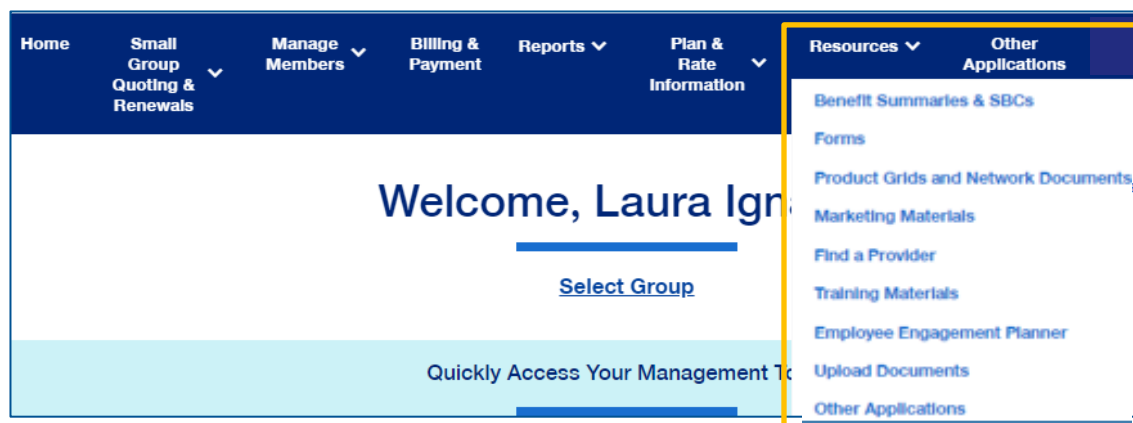
View Benefits



10 | 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
- **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

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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.

The screenshot displays the UnitedHealthcare document search interface. At the top, a breadcrumb trail shows 'Medical & Pharmacy [36]' and a 'De' link. Below this, a message states: 'To find a Benefit Summary or SBC (Summary of Benefits and Coverage) for your plan, select the plan type, state, and year. For example, Middle Market Medical and RX plan combination.' The 'Filter Documents' section includes the following controls:

- Funding Type***: A dropdown menu currently set to 'Fully Insured'.
- Group Size***: Two radio button options: 'Small Business [2-50]' (selected) and 'Middle Market [51-100]'.
- State***: A dropdown menu currently set to 'Alabama'.
- Plan Year***: A dropdown menu currently set to '2021'.
- Medical Plan Code**: A text input field containing 'AU8M' with a clear (X) button.

A yellow box highlights the 'Search' button, and a yellow circle with the number '3' is placed next to it. Below the filters, the 'Your Search Returned 11624 Documents' section is shown. It includes a search bar with the placeholder text 'Enter keyword to filter Results' and an example 'ex: Plan Code , Plan Description (3 character)'. A 'Clear Filter' link is also present. The search results are displayed in a table with four rows, each showing a plan icon, a plan name, and two links: 'Benefit Summary' and 'SBC'. A yellow circle with the number '4' is placed next to the first result row, and a yellow box highlights the 'Benefit Summary' and 'SBC' links for the second result row.

Plan Name	Benefit Summary	SBC
AdvE1000 - RX2	Benefit Summary	SBC
AdvE100021 - RX4 ADV	Benefit Summary	SBC
AdvE100021B - RX4 ADVB	Benefit Summary	SBC
AdvE1000CN - RX2	Benefit Summary	SBC



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.

The screenshot shows the top navigation bar of the system. The 'Forms' link is highlighted in the 'Resources' dropdown menu. A yellow box and the number '1' indicate the location of the 'Forms' link.

Home	Small Group Quoting & Renewals	Manage Members	Billing & Payment	Reports	Plan & Rate Information	Resources	Other Applications	Pro (On)
						Benefit Summaries & SBCs	Forms	
						Product Grids and Network Documents		
						Marketing Materials		
						Find a Provider		
						Training Materials		
						Employee Engagement Planner		
						Upload Documents		
						Other Applications		

The screenshot shows the 'Forms' page header. The 'Forms' link is highlighted in the navigation bar. A yellow box and the number '1' indicate the location of the 'Forms' link. Below the header, there is a section titled 'Looking for Plans and Networks documents or Marketing Materials?'. This section contains two links: 'Plans and Networks documents' and 'Marketing Materials for employers'. A yellow box and the number '2' indicate the location of these links.

Forms

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

Looking for Plans and Networks documents or Marketing Materials?

Plans and Networks documents

Marketing Materials for employers

The screenshot shows the 'Forms' page filters and the 'Installments, Applications, and Enrollments' section. The filters include 'State' (Alabama), 'Group Size' (2-50), and 'Language' (English). A yellow box and the number '2' indicate the location of the 'View PDF' button.

State: Alabama Group Size: 2-50 Language: English

Select a state above to get started.

Installments, Applications, and Enrollments

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

CAL | Alabama | 2-50 Full Packet

View PDF

View PDF



10 | 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 **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.

The screenshot displays the United HealthCare Services portal. The top navigation bar includes links for Home, Small Group Quoting & Renewals, Manage Members, Billing & Payment, Reports, Plan & Rate Information, Resources, and Other Applications. 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, Employee Engagement Planner, Upload Documents, and Other Applications. The 'Product Grids and Network Documents' link is highlighted with a yellow box and a circled '1'.

Below the navigation bar, a welcome message for Laura Ignazio is displayed, along with a 'Select Group' button. A section titled 'Product Grids and Network Documents' (marked with a circled '1') provides access to plan grids, network brochures, and other documents for medical and specialty plans across fully insured and level funding plans.

A box labeled 'Get Benefit Summaries and Summaries of Benefits and Coverage (SBCs) on uhceservices.com' (marked with a circled '2') contains a link to 'Download Benefit Summaries & SBCs' (also marked with a circled '2'). Below this, there are three dropdown menus for Plan Year (2022), State (Select state), and Group Size (2-50). A red message states 'Select a state above to get started.'

Below the dropdowns, the 'Plans' section shows 'RENPKG | Alabama | 2-50 | 2022'. A 'View PDF' button (marked with a circled '2') is located at the bottom right of this section.



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.

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

Welcome, Laura

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 the Employee Engagement Planner [hyperlink to EEP]

DOCNM0001 | Alabama View

DOCNM0001 | Select markets View

Experience | Material View PDF



10 | Find a Provider

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

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

Note: The screens will vary based on your selection:

- **Oxford & Oxford Level Funded**
- **UnitedHealthcare Level Funded**
- **UnitedHealthcare HMO**
- **UnitedHealthcare Freedom Plans**
- **UnitedHealthcare Fully Insured**
- **United Behavioral Health, or**
- **Prescription Drug Lists.**

Find a Provider: Oxford

1. Click **Find a Provider**. The **Provider Search** screen displays.
2. Click **Oxford & Oxford level Funded**.
3. Select the Oxford plan you are looking for.

The screenshot shows the UnitedHealthcare provider search interface. At the top, a navigation bar includes links for Home, Small Group Quoting & Renewals, Manage Members, Billing & Payment, Reports, Plan & Rate Information, Resources, and Other Applications. A dropdown menu for Resources is open, showing options like Benefit Summaries & SBCs, Forms, Product Grids and Network Documents, Marketing Materials, Find a Provider (highlighted with a yellow box and a yellow circle with the number 1), Training Materials, Employee Engagement Planner, Upload Documents, and Other Applications. Below the navigation bar, a welcome message reads 'Welcome, Laura I' followed by a 'Select Group' link. A light blue banner below that says 'Quickly Access Your Management Tools'. The main section is titled 'Provider Search' and contains a grid of seven UnitedHealthcare logos, each with a plan name below it: 'Oxford & Oxford Level Funded' (highlighted with a yellow circle with the number 2), 'UnitedHealthcare Level Funded', 'UnitedHealthcare HMO', 'UnitedHealthcare Freedom Plans', 'UnitedHealthcare Fully Insured', 'United Behavioral Health', and 'Prescription Drug Lists'. Below the grid is a section titled 'What Oxford plan are you looking for?' with a subtitle 'You can find your plan name on the front of your member ID card in the bottom right corner.' (the subtitle is highlighted with a yellow circle with the number 3). This section contains two input fields with the text 'Metro' and 'Freedom'.



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.

What location do you want to find a provider in?

Enter a street address, city & state or 5 digit zip code.

4

CONTINUE

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

Birmingham, AL
CHANGE LOCATION

5

SEARCH

CHOICE PLUS CHANGE PLAN >

< Results for **All Primary Care Providers** 5

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

NEW SEARCH
VIEW MAP

✓ 1357 In-Network Providers Found Near 35203 [Reset Results](#) SORT RESULTS BY: PREFERRED PROVIDERS

Filter Results by Provider Name FILTER

Refine Results


Changing a search results filter will reload the page immediately.

LOCATION —

WHERE
Birmingham, AL

With the spread of COVID-19, please call your provider's office before you go to confirm their availability, location, service options—including telemedicine—and any precautions you should take.

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

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



10 | Find a Provider (continued)

Find A Provider: Level Funded

- 1. Select **Find a Provider**.
- 2. Click **UnitedHealthcare Level Funded**.
- 3. Select the state where your provider resides.
- 4. Select a plan in the specific state.

Resources ^

Benefit Summaries & SBCs

Forms

Product Grids and Network Documents

Marketing Materials

Find a Provider

1

Provider Search

United Healthcare
Oxford

Oxford & Oxford Level Funded

United Healthcare

UnitedHealthcare Level Funded

2

United Healthcare

UnitedHealthcare HMO

In what state are you looking for a provider?

Alabama

3

Alaska

Select a plan in Alabama.

Charter

4

Choice

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85

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.

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



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.

The screenshot displays the UnitedHealthcare provider search process. At the top, a 'Resources' dropdown menu is open, with 'Find a Provider' highlighted and marked with a yellow circle containing the number 1. Below this, the 'Provider Search' section shows three UnitedHealthcare logos: 'Oxford & Oxford Level Funded', 'UnitedHealthcare Level Funded', and 'UnitedHealthcare HMO'. The 'UnitedHealthcare HMO' option is marked with a yellow circle containing the number 2. A text prompt states: 'To search for doctors, clinics or facilities, choose the state where you live'. Below this, four state map icons are shown: California, Oklahoma, Oregon, and Washington. The California icon is marked with a yellow circle containing the number 3. At the bottom, a section titled 'Select a network in California' shows two options: 'SignatureValue Advantage HMO' and 'SignatureValue Alliance HMO'. The 'SignatureValue Advantage HMO' option is marked with a yellow circle containing the number 4.



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.

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

5

Enter a street address, city & state or 5 digit zip code.

Street Address, City & State, Zip Code

CONTINUE

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

Los Angeles, CA
CHANGE LOCATION

6

Search by provider, service, or condition

SEARCH

CHOICE PLUS CHANGE PLAN >

Results for **All Primary Care Providers** 6

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

NEW SEARCH
VIEW MAP

1357 In-Network Providers Found Near 35203 [Reset Results](#) SORT RESULTS BY: PREFERRED PROVIDERS

Filter Results by Provider Name FILTER

Refine Results


Changing a search results filter will reload the page immediately.

LOCATION —

WHERE
Birmingham, AL

With the spread of COVID-19, please call your provider's office before you go to confirm their availability, location, service options—including telemedicine—and any precautions you should take.

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

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



10 | Find a Provider (continued)

Find A Provider: UnitedHealthcare Freedom Plans

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

Resources ^

Benefit Summaries & SBCs

Forms

Product Grids and Network Documents

Marketing Materials

Find a Provider

1

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

3



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.

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



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.

What location do you want to find a provider in?

Enter a street address, city & state or 5 digit zip code.

Street Address, City & State, Zip Code

Continue

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

Los Angeles, CA
CHANGE LOCATION

Search by provider, service, or condition

SEARCH

Search Results

Search by provider, service, or condition

Search

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, services including telemedicine—and any precautions you should take.

Refine Results

Changing a search results filter will reload the page immediately.

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

Federally Qualified Health Center (FQHC)

Specialty



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.

Resources ^

Benefit Summaries & SBCs

Forms

Product Grids and Network

Marketing Materials

Find a Provider 1

Provider Search

Oxford & Oxford Level Funded

UnitedHealthcare Level Funded

UnitedHealthcare HMO

United Healthcare Freedom Plans

UnitedHealthcare Fully Insured 2

United Behavioral Health

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

UHC Member
You have UnitedHealthcare

Shopping Around
View your UHC plan options 3

What plan are you looking for?

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

Individual and Family State Exchanges

All Savers Health Plans 4

Charter / Charter Balanced



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.

What location do you want to find a provider in?

Enter a street address, city & state or 5 digit zip code.

Street Address, City & State, Zip Code

Continue

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

Los Angeles, CA
CHANGE LOCATION

Search by provider, service, or condition

SEARCH

Search Results

Search by provider, service, or condition

SEARCH

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

Refine Results

Changing a search results filter will reload the page immediately.

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



10 | Find a Provider (continued)

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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 United Healthcare Provider Search interface. At the top, a 'Resources' dropdown menu 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). To the right, the 'Provider Search' header is visible. Below the header, there are several United Healthcare logos and plan names: 'United Healthcare Level Funded', 'United Healthcare HMO', 'United Healthcare Freedom Plans', 'United Healthcare Fully Insured', and 'United Behavioral Health' (highlighted with a yellow circle with the number 2). 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 placeholder text 'Enter provider name, keyword or leave blank', a location pin icon with 'Eden Prairie, MN 55344', and a 'Search' button (highlighted with a yellow circle with the number 3). Below the search bar, it says 'You can filter by provider types and service descriptions on the next page.' The bottom section shows the search results for 'Eden Prairie, MN 55344'. It includes a 'Refine Results' sidebar with filters for 'Sort By' (Distance), 'Within' (25 Miles), 'Search Filters', 'Coverage/Plan Type' (Medicare, Medicaid, Commercial), 'Schedule Online', and 'virtual visit (Online Therapy)'. The main results area shows two providers: 'Leah Willett BCBA' and 'Melanie Vankuiken BCBA'. Each provider card includes a 'PROVIDER' label, 'BOARD CERT BEHAVIORAL ANALYST', a 'Leave a review' link, 'Accepting New Patients' status, 'Email information is not available', 'Website information is not available', a phone number '(952) 401-9359', an address '10273 Yellow Circle Dr Minnetonka MN 55343', and a distance '0.2 Miles' (highlighted with a yellow circle with the number 3).



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.

The screenshot displays the United Healthcare website interface. On the left, a 'Resources' sidebar lists various links, with 'Find a Provider' highlighted by a yellow box and a yellow circle with the number '1'. The main content area is titled 'Provider Search' and features a grid of plan logos. The 'Prescription Drug Lists' link at the bottom of this grid is highlighted with a yellow circle and the number '2'. Below the 'Provider Search' section, the 'Prescription Drug Lists' page is shown. A sidebar on the left of this page lists 'Pharmacy benefits' with 'Prescription Drug Lists' selected, highlighted by a yellow box and a yellow circle with the number '3'. The main content of the 'Prescription Drug Lists' page includes a sign-in prompt, a definition of a PDL, 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)'.

Resources ^

- Benefit Summaries & SBCs
- Forms
- Product Grids and Network Docs
- Marketing Materials
- Find a Provider** 1

Provider Search

- Oxford & Oxford Level Funded
- UnitedHealthcare Level Funded
- UnitedHealthcare HMO
- United Healthcare Freedom Plans
- UnitedHealthcare Fully Insured
- United Behavioral Health
- Prescription Drug Lists** 2

Pharmacy benefits

- Prescription Drug Lists**
- Pharmacy programs
- Oxford pharmacy network
- Pharmacy FAQ

Prescription Drug Lists

Check your PDL to stay updated on your pharmacy coverage

A Prescription Drug List (PDL) – also called a formulary – is a list of commonly used medications, organized into cost levels, called tiers. These costs are decided by your employer or health plan. View your PDL to learn what's covered by your plan.

Sign In to view the PDL for your plan

Select your plan to sign in

Health Insurance Marketplace and Small and Large Group plans

Learn about PDLs for health plans available through the Health Insurance Marketplace (also called State Exchange plans), Small Business Health Options Program (SHOP) and Small Group and Large Group plans.

Individual and SHOP Marketplace Drug Lists (On-Exchange)

- Individual Health Insurance Marketplace (if selecting a plan on your own)
- SHOP Marketplace (if selecting a plan through your job)

Small Group and Large Group Drug Lists (Off-Exchange)

- Prescription Drug Lists
- Medical Drug Lists



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.

The screenshot displays the 'Training Materials' page. At the top, a dark blue navigation bar contains links: Home, Small Group Quoting & Renewals, Manage Members, Billing & Payment, Reports, Plan & Rate Information, Resources, and Other Applications. 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 box and a '1' in a yellow circle), Employee Engagement Planner, Upload Documents, and Other Applications. Below the navigation bar, a welcome message 'Welcome, Laura Lynn' is followed by a 'Select Group' link. A light blue banner reads 'Quickly Access Your Management Tools'. The main section is titled 'Training Materials' and contains a search bar with the text 'Find resources to assist you in utilizing uhceservices, SAMx and SAMx - Level Funded, including guides, presentations, and videos.' Below the search bar, there are four dropdown menus for filtering: 'Select a Brand' (Please Select), 'Select a State' (Please Select), 'Select a Product Type' (Please Select), and 'Select a Group Size' (Please Select). These filters are enclosed in a yellow box with a '2' in a yellow circle. Below the filters, a red text prompt says 'Select filters above to get started.' At the bottom, a section titled 'Training Internal' shows a list of items: 'SAMx' and 'uhceservices.com', each with a dropdown arrow. This section is also enclosed in a yellow box with a '2' in a yellow circle.



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 informed.

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**.

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The screenshot shows the 'Employee Engagement Planner' interface. At the top, a dark blue navigation bar contains links: Home, Small Group Quoting & Renewals, Manage Members, Billing & Payment, Reports, Plan & Rate Information, Resources, and Other Applications. A dropdown menu for 'Resources' is open, showing options like 'Benefit Summaries & SBCs', 'Forms', 'Product Grids and Network Documents', 'Marketing Materials', 'Find a Provider', 'Training Materials', 'Employee Engagement Planner' (highlighted with a yellow box and a yellow circle with the number 1), 'Upload Documents', and 'Other Applications'. Below the navigation bar, a light blue banner reads 'Welcome, Laura Ign...' and 'Select Group'. A light blue bar below that says 'Quickly Access Your Management Tools'. The main section is titled 'Employee Engagement Planner' and includes a yellow circle with the number 1. Below this, there's a dark blue banner with a computer monitor and a plant icon. A paragraph of text follows: 'You care about the health of your employees and want to keep them up on all their health plan has to offer, but you've got enough on your plate. The Employee Engagement Planner provides you with all the communications you need to help your employees stay engaged with their health — and health plan — throughout the plan year.' Below this text are two yellow boxes, each with a yellow circle and the number 2. The first box is titled 'View Calendar' and contains a calendar icon and the text: 'View content calendars to make it easier to keep your employees informed throughout the plan year.' The second box is titled 'View All Topics' and contains a document icon and the text: 'Find ready-to-send employee emails, fliers and brochures organized by topic.'



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.

Calendar

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.

Add New Calendar

Select Brand

☐ UnitedHealthcare

☐ Oxford

☐ UnitedHealthcare Level Standard

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



10 | Employee Engagement Planner (continued)

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4. **View All Topics** - Links to topics that can be shared with employees.

When you click on a topic, you will see filters that allow you to download topics in different formats (brochure, email, flier) when available.


View All Topics

4


Select the topic you're interested in to find communications to share with employees.

**Before the Plan Begins**


- Waiting for Coverage to Start
- Getting Started Checklist

**Help Employees Understand Their Plan**

- Health and wellness programs
- Ways to access care
- Ways to access their health plan
- Ways to lower costs
- ER Redirection

**Welcome Employees**

- Welcome Brochure
- Premium Designation Program
- OptumRx®

**Seasonal Reminders**

- Flu Shots
- Annual Checkups

View All Topics Category

Filter Options

Category Type

☐ Brochure

☐ Email

☐ Flier

☐ Select All

Product Brand

☐ UnitedHealthcare

☐ Oxford

☐ UnitedHealthcare Level Funded

States

☐ Connecticut

☐ New York

☐ New Jersey

☐ Select All

Apply

Reset

Before the Plan Begins

UHC New Member Checklist


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

Choose a Communication Type:

Flier

Email

4




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





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.

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

Welcome, Laura Ign...

Select Group

Quickly Access Your Management Tools

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](#) +

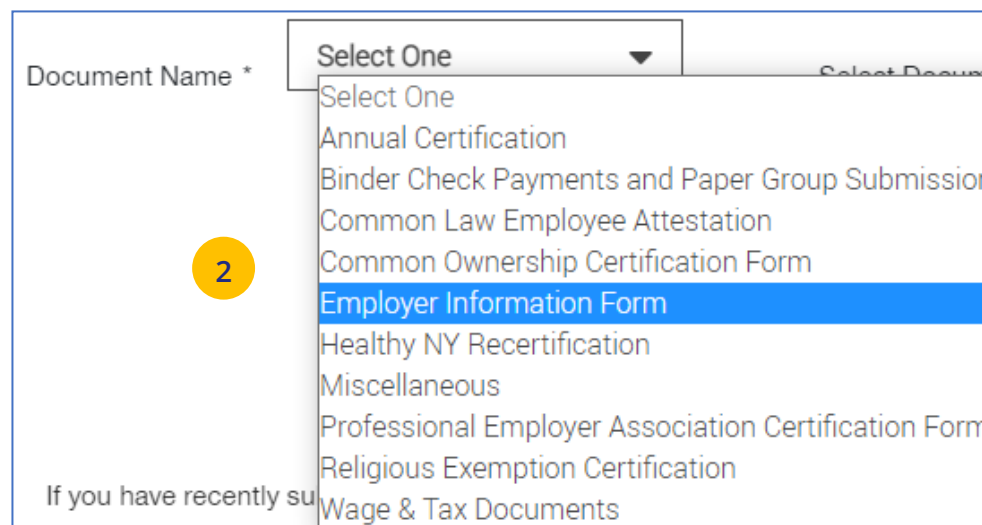
[Clear Selections](#) [Upload](#)

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.

10 | Upload Documents (continued)

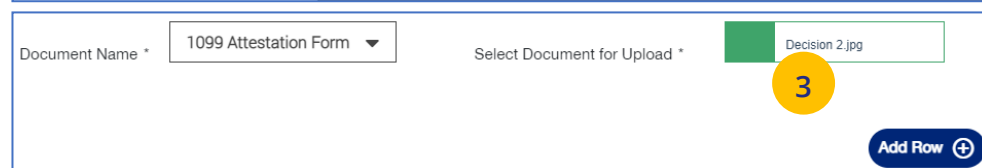
2. Use the **Document Name** drop-down to select the document you need to upload.
3. Click the **Select Document for Upload** box and attach the document for upload. Repeat this if needed by clicking **Add Row**. You can upload up to five documents at one time.
4. Click **Upload**. A “successfully uploaded” confirmation message will display.



Document Name * Select One ▼

- Select One
- 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
- Wage & Tax Documents

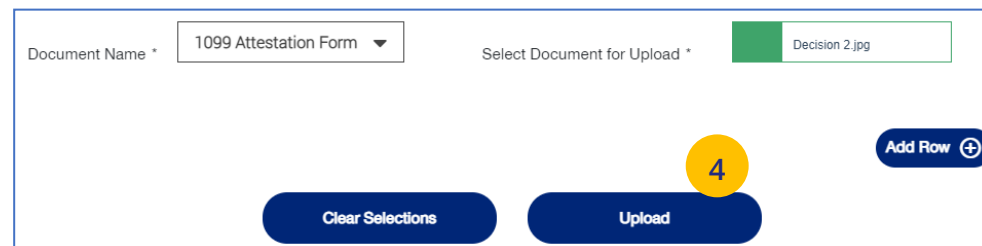
If you have recently su



Document Name * 1099 Attestation Form ▼

Select Document for Upload * Decision 2.jpg

Add Row (+)

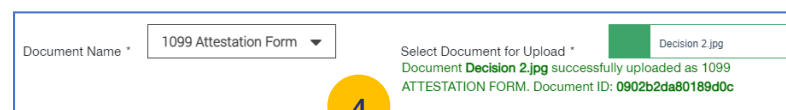


Document Name * 1099 Attestation Form ▼

Select Document for Upload * Decision 2.jpg

Clear Selections **Upload**

Add Row (+)



Document Name * 1099 Attestation Form ▼

Select Document for Upload * Decision 2.jpg

Document **Decision 2.jpg** successfully uploaded as 1099 ATTESTATION FORM. Document ID: **0902b2da80189d0c**



10 | Other Applications

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

Home

Small Group Quoting & Renewals

Manage Members

Billing & Payment

Reports

Plan & Rate Information

Resources

Other Applications

Product (Other)

Welcome, Laura Ign

Select Group

Quickly Access Your Management Tools

Benefit Summaries & SBCs

Forms

Product Grids and Network Documents

Marketing Materials

Find a Provider

Training Materials

Employee Engagement Planner


Upload Documents

Other Applications

Other Applications

1

Employer eServices



Market

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

Carrier

UnitedHealthcare

Funding Type

Fully Insured

Product

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

Functionality

Enrollment

Go to Employer eServices

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