Uhceservices.com Reference Guide for Brokers

United Healthcare

About this Document

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

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

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

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

Using this Document

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1 | How to Register: Email Invitation

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

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

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

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

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

1. When you receive your email invitation, click the **Register Now** link within the email. The **Create One Healthcare ID screen displays**.

   Note: If you already have a One Healthcare ID, click the **Sign in now** link in the **Already have One Healthcare ID** box. You will go to the Sign In screen where you can sign in with your existing ID.

Dear **Cindi**

Welcome. \ rsonal access to the **uhceservices.com** broker and employer website on behalf of **TRUE LIFE CENTER FOR WELLBEING.**

The websit :ination for information pertaining to your client's health benefits plan and your business transactions with us.

Please take a moment today to register on **uhceservices.com.** Doing so will allow you to become familiar with all the website has to offer you for servicing **TRUE LIFE CENTER FOR WELLBEING.**

Get Started

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

1

Act Now

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

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

Thank you,

uhceservices.com Administration Team

Email Invitation to Brokers and Employers (Cirrus)

Subject: Your registration for uhceservices.com

Dear $$firstName$$ $$lastName$$,

Welcome. We're pleased to provide you with personal access to the uhceservices.com broker and employer website on behalf of **$$userTypeName$$.**

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

Please take a moment today to register on uhceservices.com. Doing so will allow you to become familiar with all the website has to offer you for servicing **$$userTypeName$$.**

Get Started

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

Act Now

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

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

Thank you,

uhceservices.com Administration Team

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

**Except for periodic downtimes.

Health plan coverage provided by or through UnitedHealthcare Insurance Company, UHC of California and UnitedHealthcare Benefits Plan of California. Administrative services provided by United Healthcare Services, Inc., OptumRx or OptumHealth Care Solutions, Inc. Behavioral hea products are provided by U.S. Behavioral Health Plan, California (USBHPC).

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

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

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

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

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

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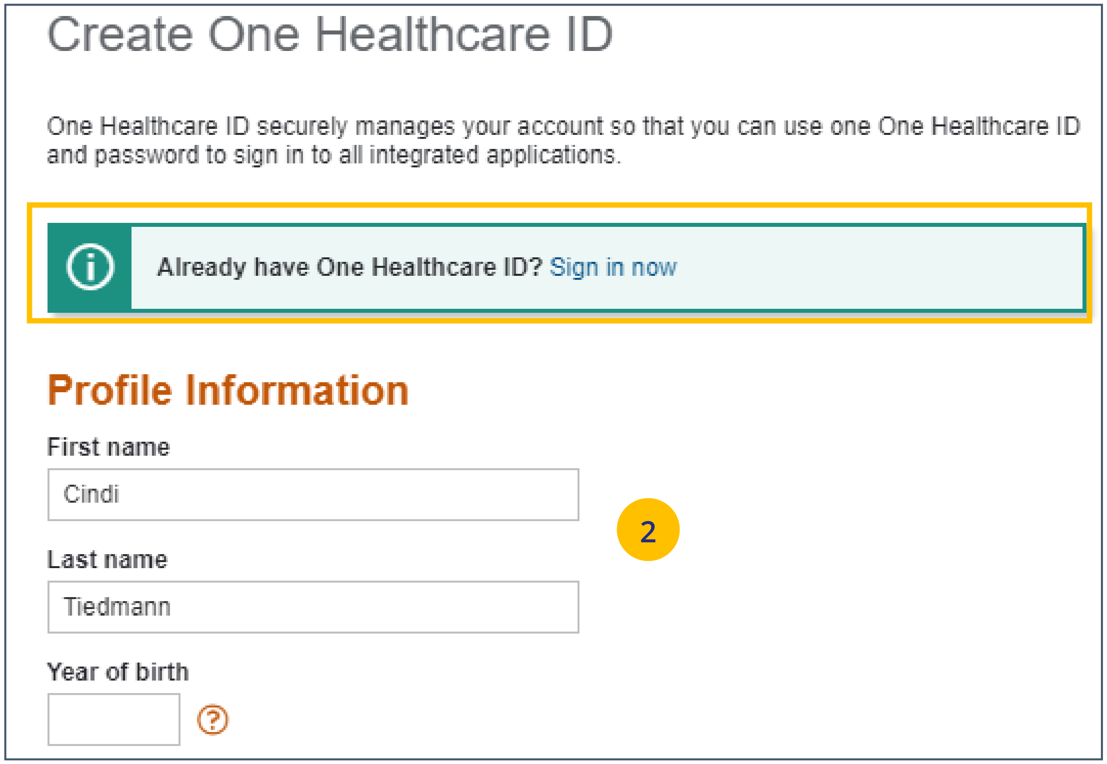
Email Invitation to Brokers and Employers (UnitedHealthcare HMO)

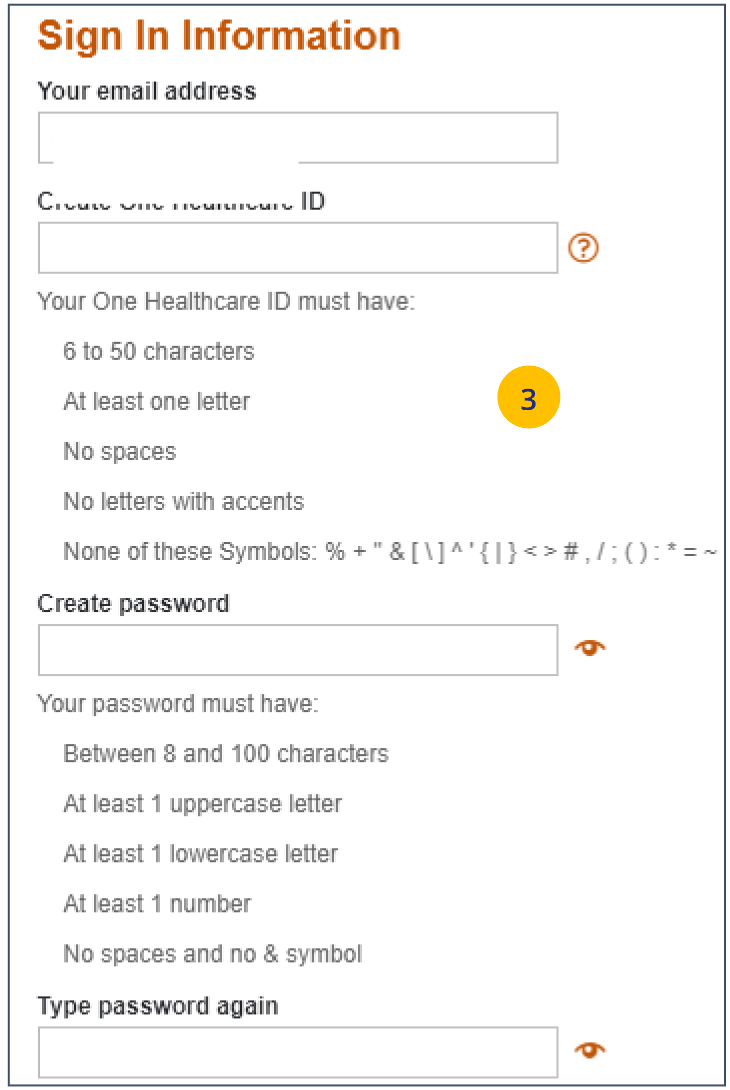
1 | How to Register: Email Invitation (continued)

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



1 | How to Register: Email Invitation (continued)

3. Enter information in the **Sign In Information** section.



1 | How to Register: Email Invitation (continued)

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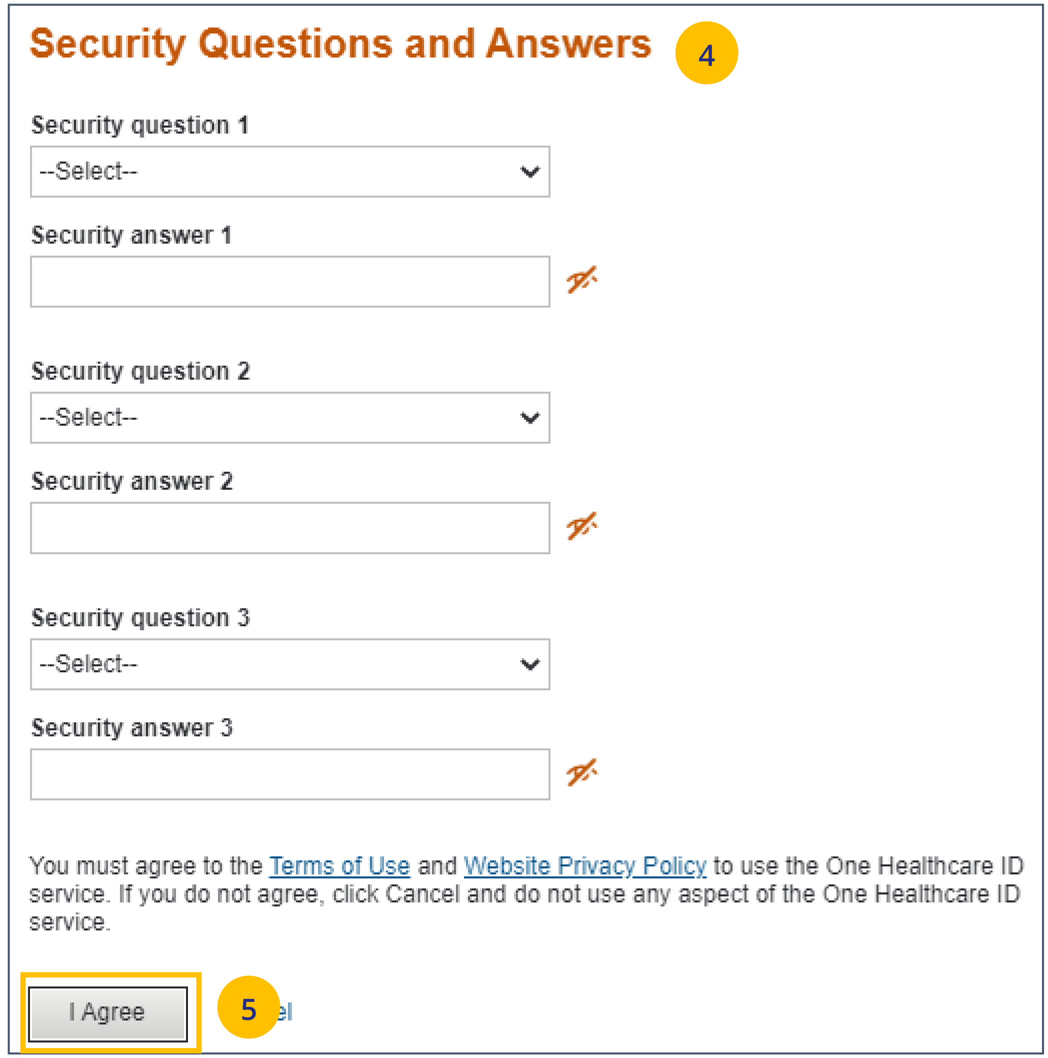
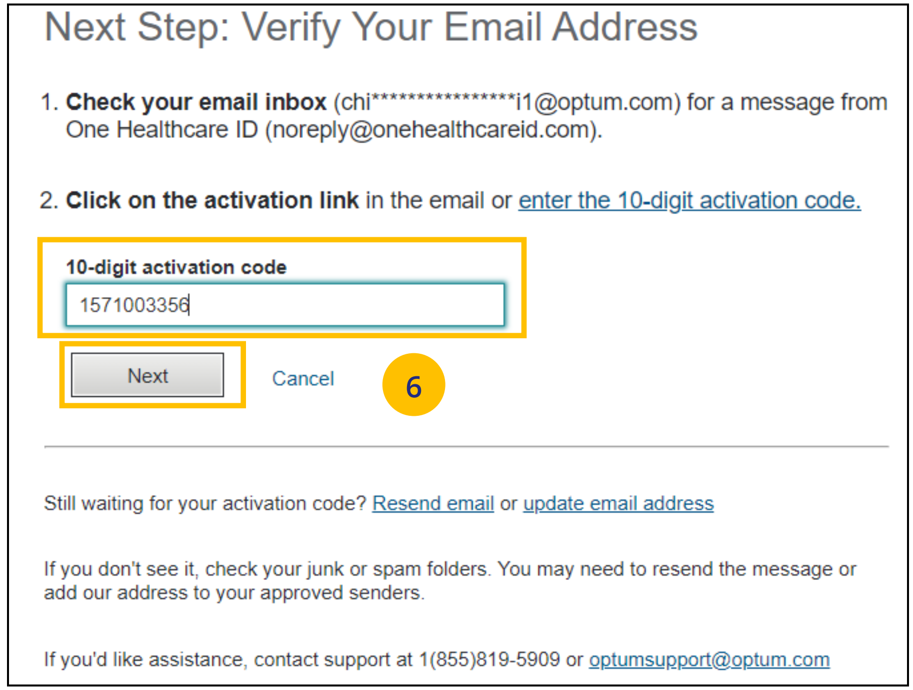
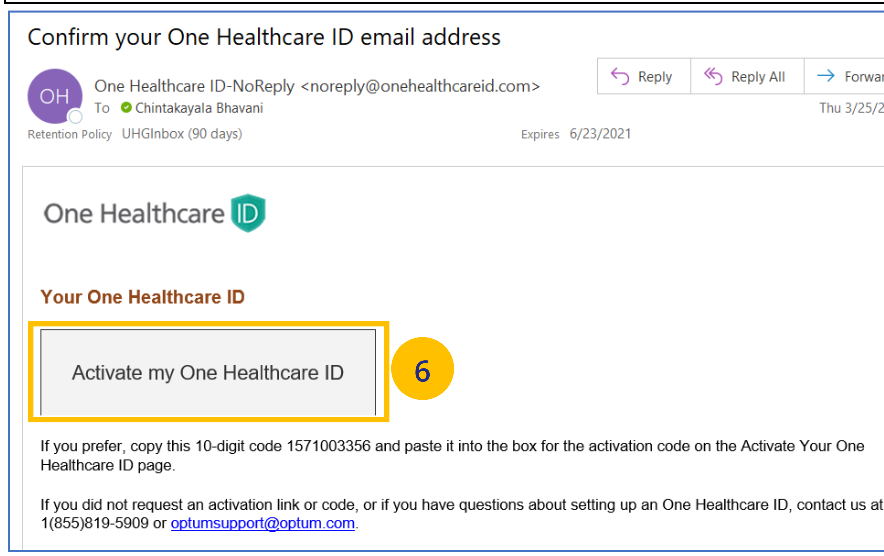
4. Enter your **Security Questions and Answers**. These will be used to verify your identity when you sign in to uhceservices.
5. Click **I Agree**. You have completed the process to create your One Healthcare ID.



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





1 | How to Register: Email Invitation (continued)

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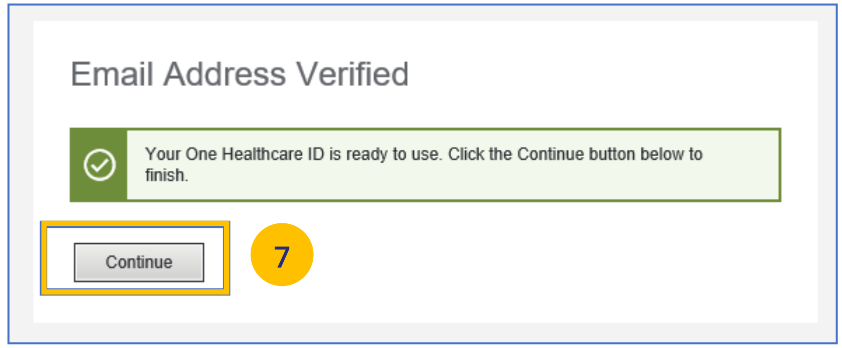
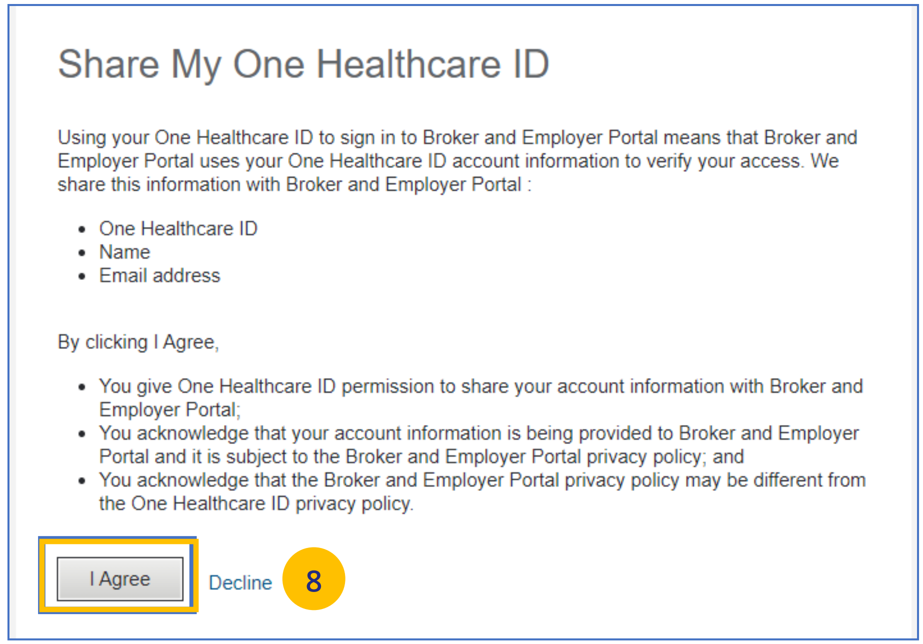
7. Click **Continue**.
8. Click **I Agree** to agree to share your One Healthcare ID information with the Broker & Employer (B&E) portal.





9. You will be asked to attest to the **Terms of Use** and **Privacy Policy**. You need to select each document which will open the document for you to review. Once you open each document and select the corresponding checkboxes, the **Agree** button will be enabled.

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

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

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What is happening?

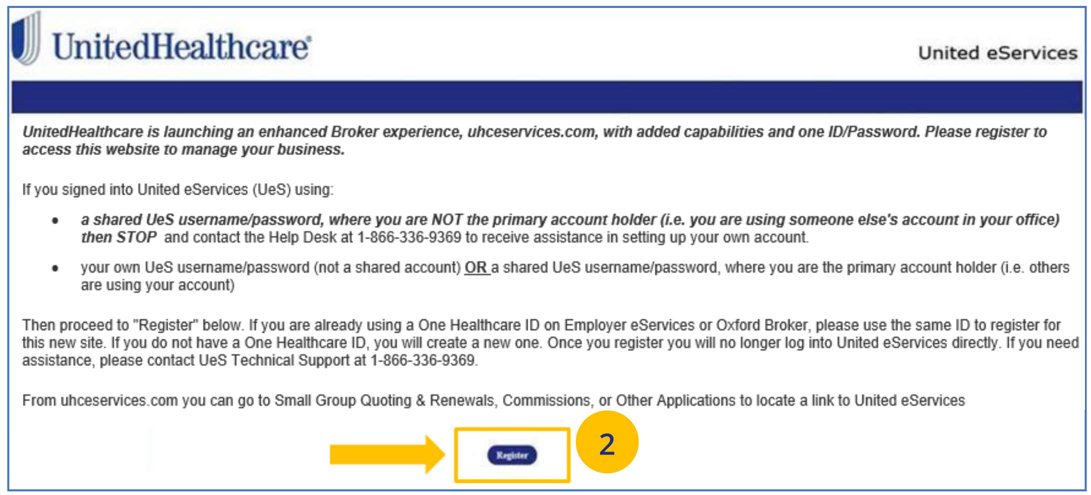
- Brokers will be transitioned from United eServices (UeS) to uhceservices by market in a phased approach. You will receive a message upon logging into United eServices, directing you to register for uhceservices.
- After registering, you will then use uhceservices as your Broker site and access UeS directly from uhceservices.
- You can only access UeS directly from uhceservices.com.

Follow the steps below to register for uhceservices.com from UeS.

1. Log in to UeS. You will be asked to register for uhceservices.com.

   Note: The text in this message will differ for **UnitedHealthcare HMO** users.

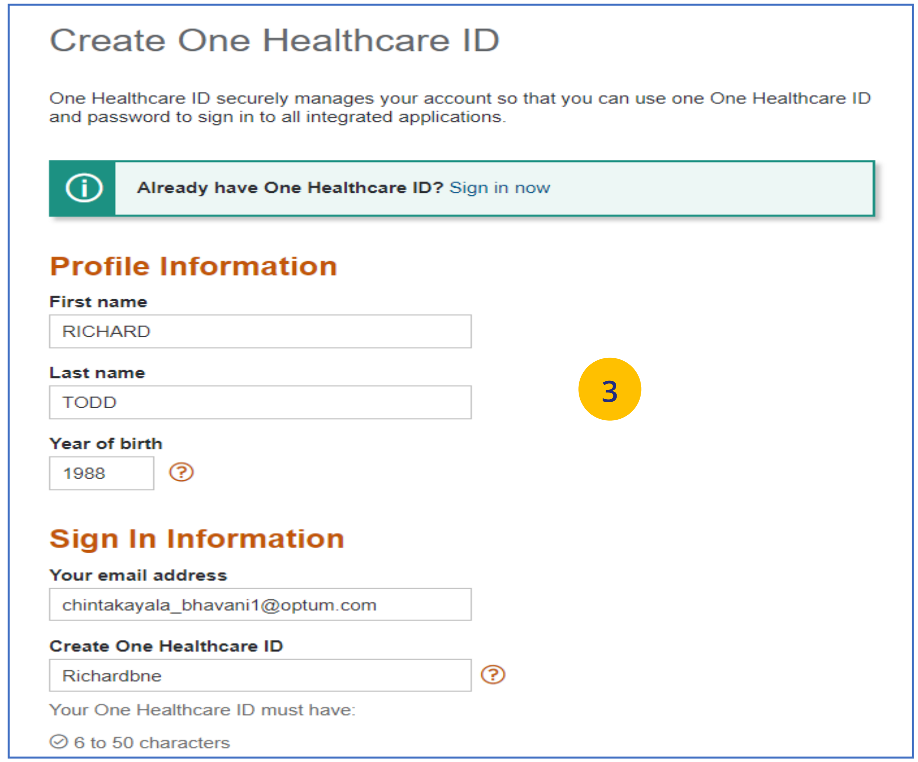
2. Click **Register**.

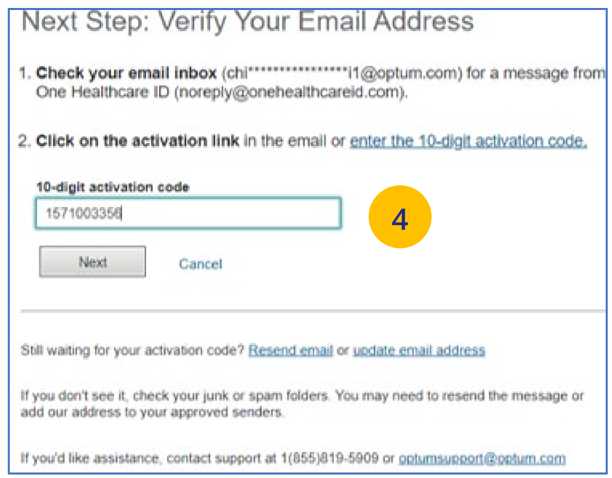


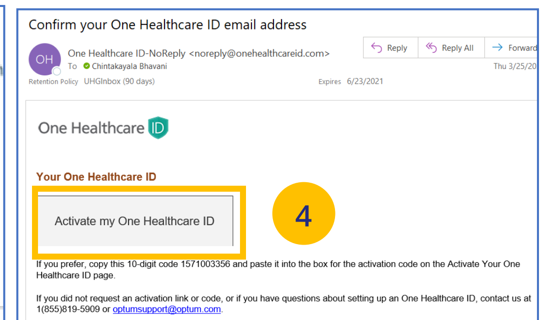
3. Enter information to create your **One Healthcare ID** or click the **Sign in now** link to sign in using an existing One Healthcare ID.

4. Check your email box for an email from One Healthcare ID. You can:

   - Enter the 10-digit activation code to verify your email address and click **Next**, **or**
   - You can click the activation link in the email.







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

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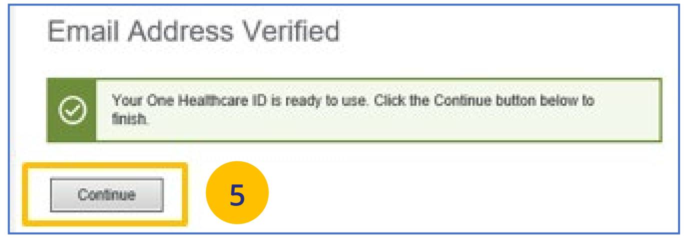
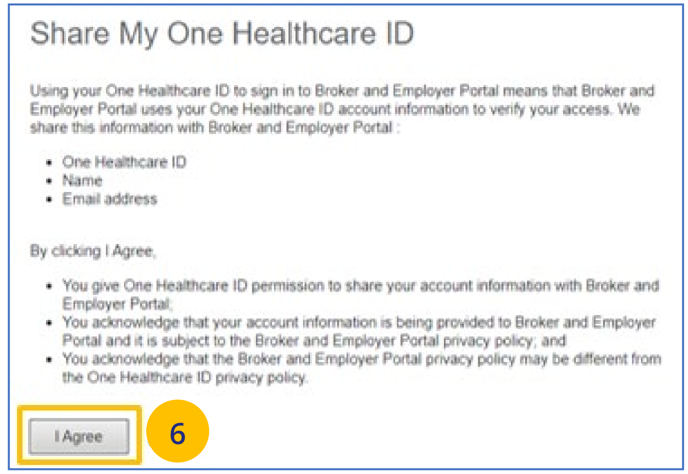
5. Click **Continue**.

6. Click **I Agree**.





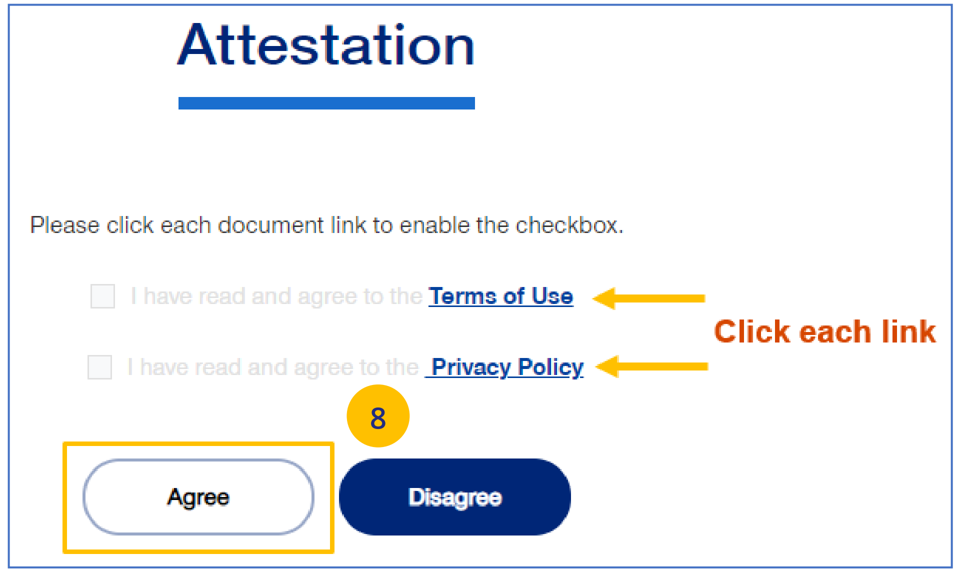
7. Follow the Attestation process by clicking each link (Terms of Use and Privacy Policy). Then click **Agree**. The **Pending Associations** screen displays.

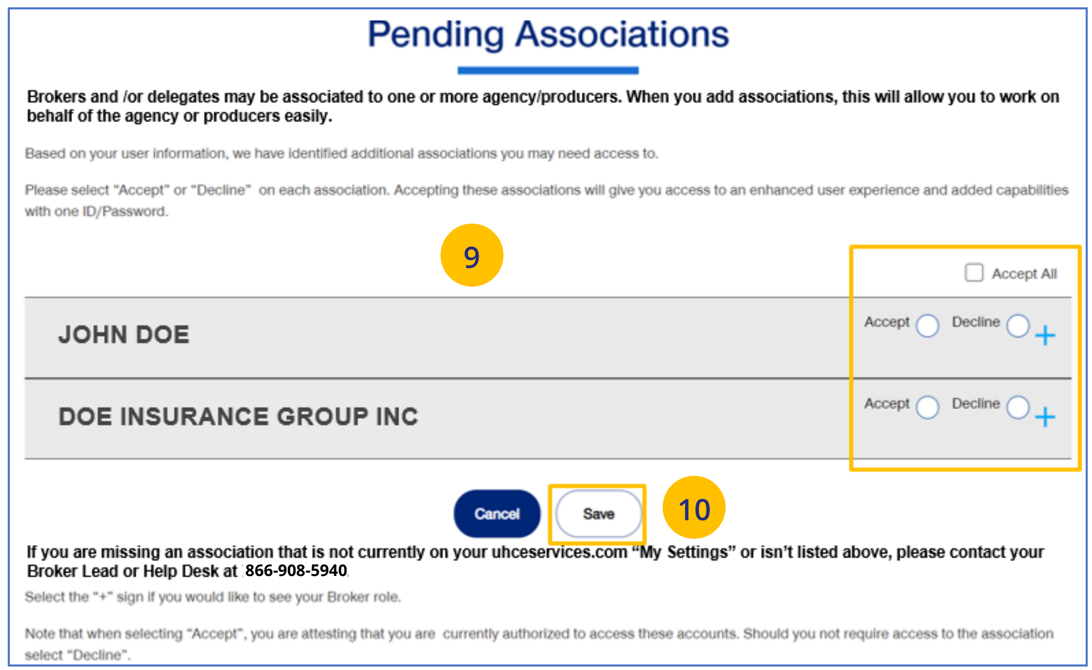
   Note: Pending Associations - Each user, whether you are a broker or a delegate, are associated to one or more agencies or producers. This allows you to easily work on their behalf: quoting new business, managing renewals, etc. You must be associated with all the commission codes used so you can see all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

8. Select **Accept** to accept any or all Broker associations.

9. Click **Save**. The uhceservices.com Home Page displays.

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





1 | Access and Log In with OneHealthcare ID

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

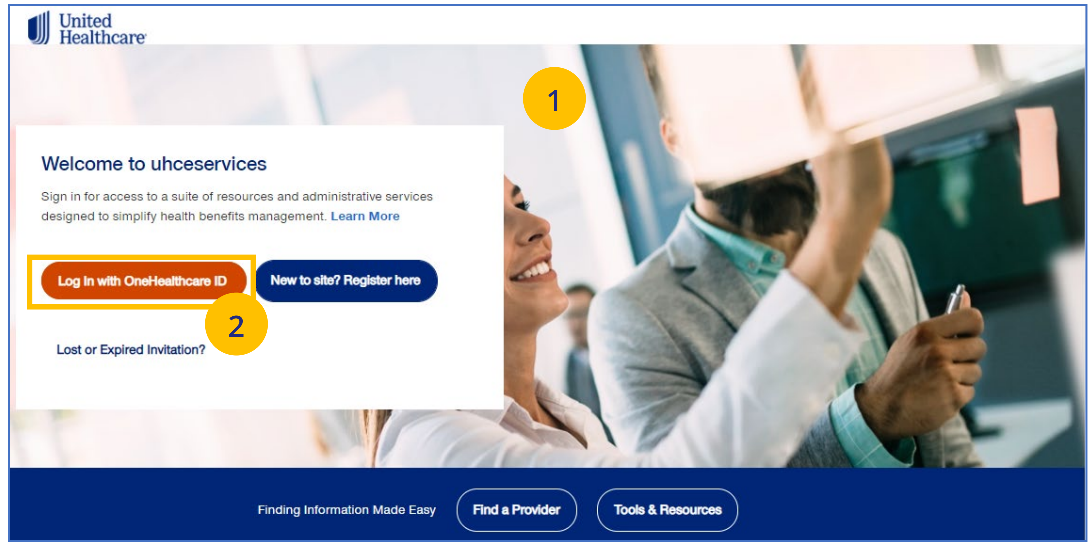
NOTE: If you have lost or deleted your email invitation, click the **Lost or Expired Invitation?** link. Follow the prompts to get a new invitation sent to you.

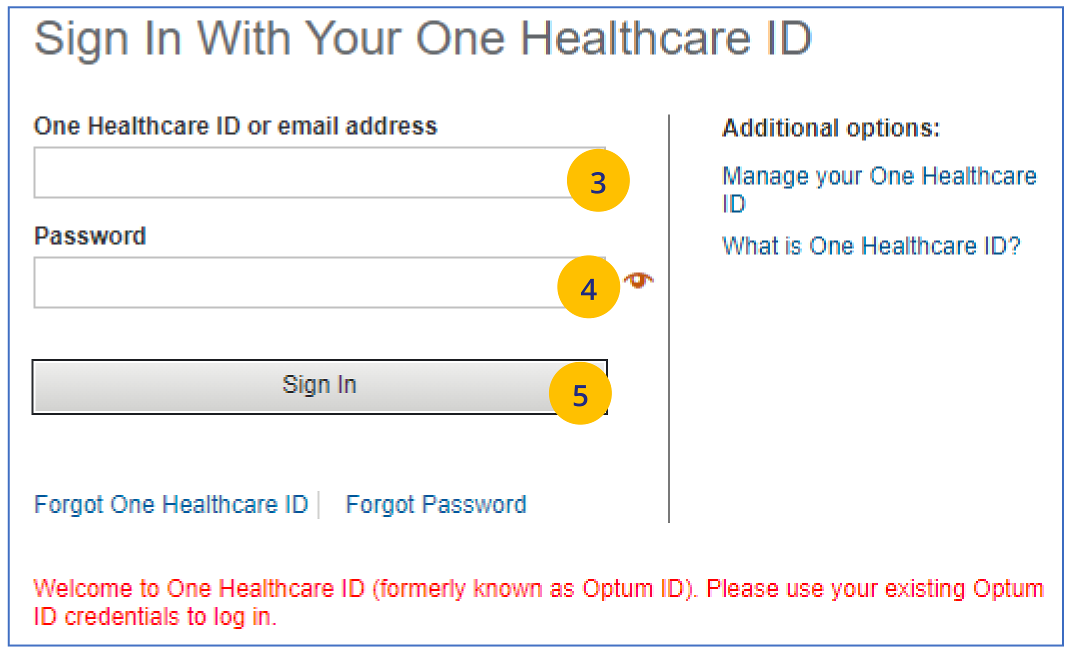
1. Go to uhceservices.com. The Log In page displays.
2. Click **Log In With OneHealthcare ID**.
3. Enter your One Healthcare ID in the **One Healthcare ID or email address** field.
4. Enter your Password in the **Password** field.
5. Click **Sign In**. The **Home** page displays.

What information will you see?

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

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

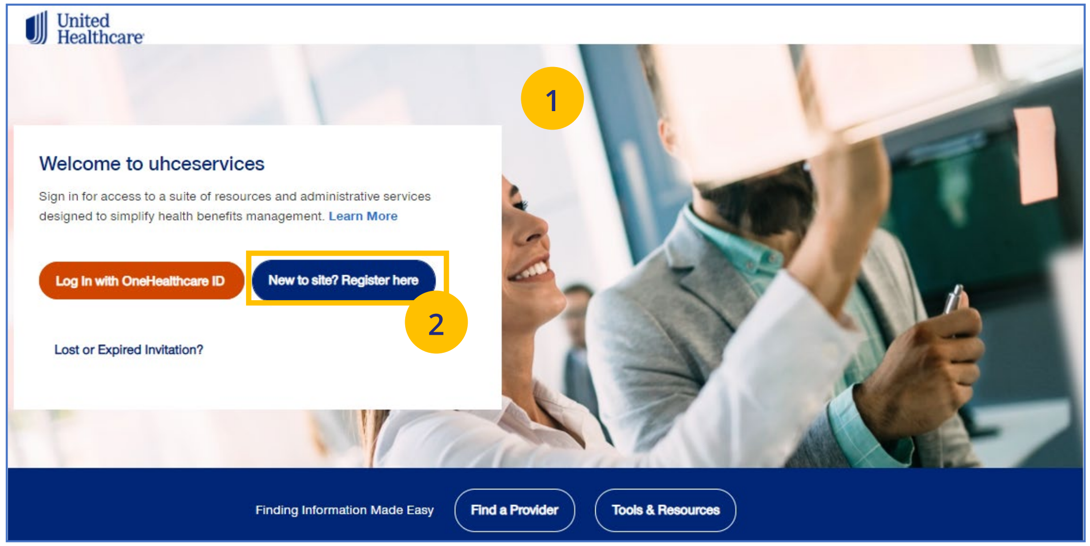


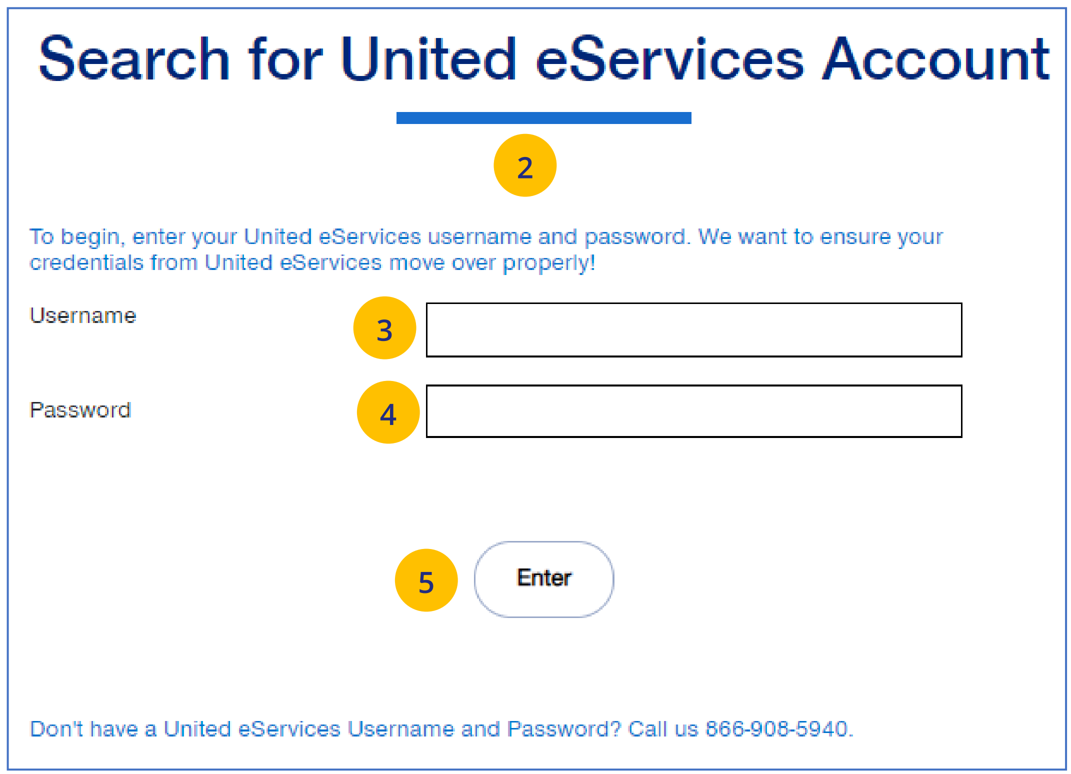


1 | Access: New to Site

NOTE: If you are new to uhceservices and do not have a OneHealthcare ID**,** follow the steps below.

1. Go to uhceservices.com. The Log In page displays.
2. Click the **New to site? Register here** button. The **Search for United eServices Account** screen displays.

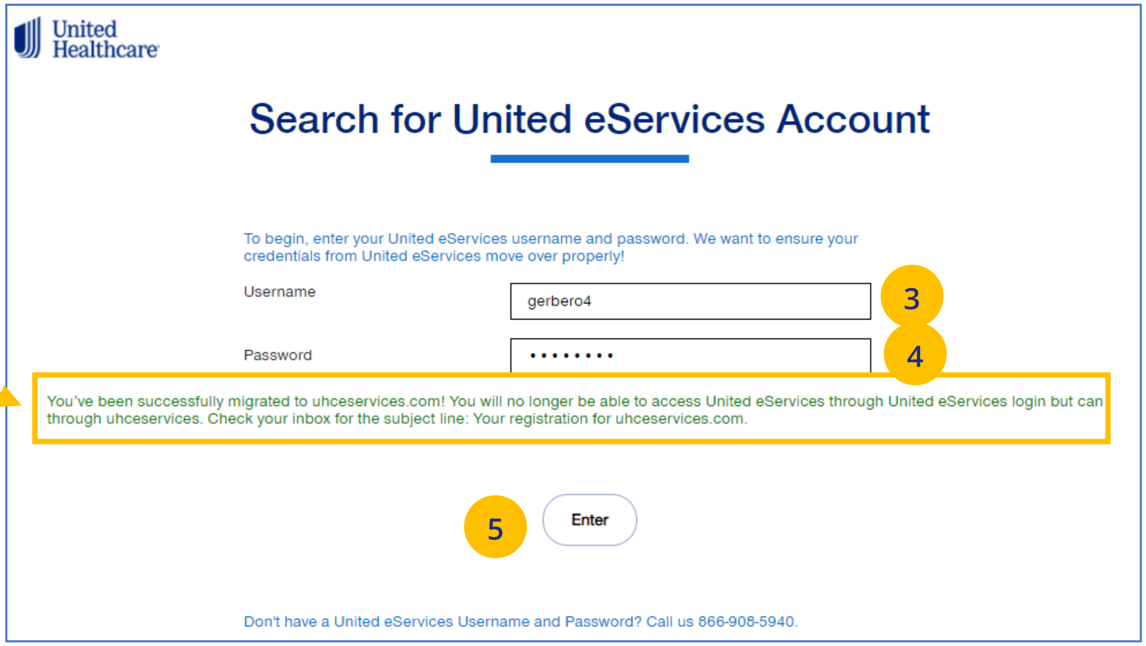


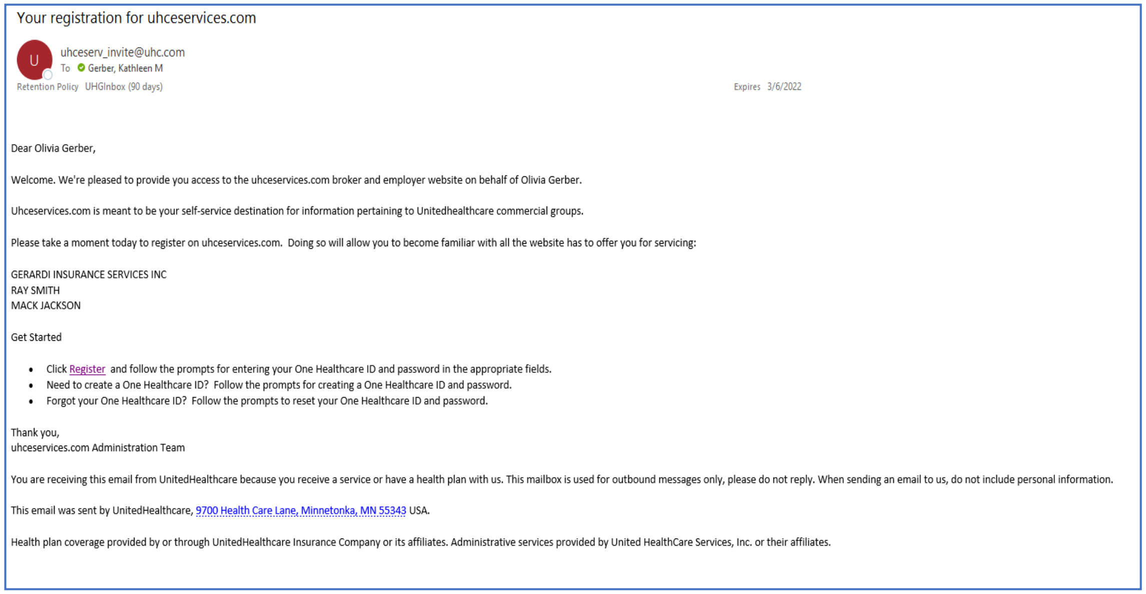


1 | Access: New to Site (continued)

3. Enter your UeS user name in the **Username** field.
4. Enter your UeS password in the **Password** field.
5. Click **Enter**. You will get a message that you have successfully migrated to uhceservices.com. You will receive an email with the link to register.

   Note: If you have a User ID that has already migrated from UeS, you can follow the prompts to create your own account.




Your registration for uhceservices.com

uhceserv_invite@uhc.com
To Gerber, Kathleen M
Retention Policy UHGInbox (90 days) Expires 3/6/2022

Dear Olivia Gerber,

Welcome. We're pleased to provide you access to the uhceservices.com broker and employer website on behalf of Olivia Gerber.

Uhceservices.com is meant to be your self-service destination for information pertaining to Unitedhealthcare commercial groups.

Please take a moment today to register on uhceservices.com. Doing so will allow you to become familiar with all the website has to offer you for servicing:

GERARDI INSURANCE SERVICES INC
RAY SMITH
MACK JACKSON

Get Started

- Click Register and follow the prompts for entering your One Healthcare ID and password in the appropriate fields.
- Need to create a One Healthcare ID? Follow the prompts for creating a One Healthcare ID and password.
- Forgot your One Healthcare ID? Follow the prompts to reset your One Healthcare ID and password.

Thank you,
uhceservices.com Administration Team

You are receiving this email from UnitedHealthcare because you receive a service or have a health plan with us. This mailbox is used for outbound messages only, please do not reply. When sending an email to us, do not include personal information.

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

Health plan coverage provided by or through UnitedHealthcare Insurance Company or its affiliates. Administrative services provided by United HealthCare Services, Inc. or their affiliates.

1 | Access: Lost or Expired Invitation

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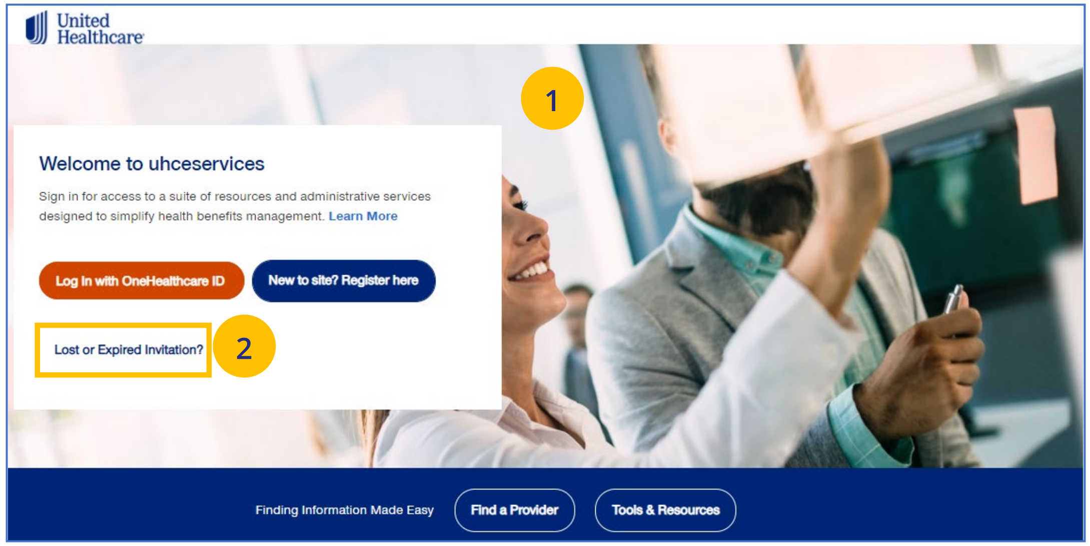
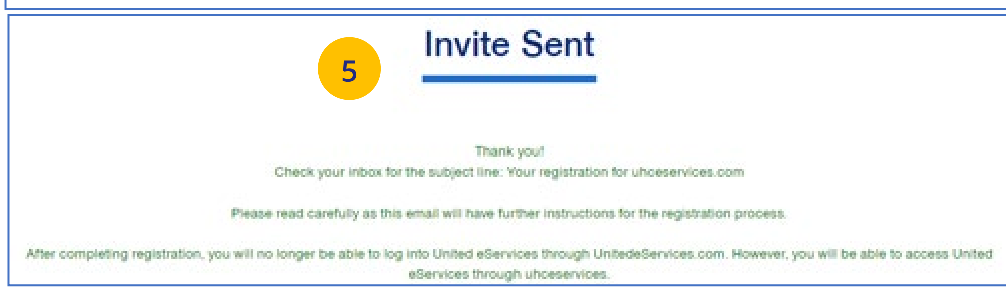
NOTE: Registration invites expire after 60 days. If you have lost your email invitation to register or have an expired invitation, follow the steps below.

1. Go to uhceservices.com. The Log In page displays.
2. Click the **Lost or Expired Invitation?** The **Re-Send Invitation** screen displays.
3. Enter your email address in the **Email** field.
4. Enter your email address in the **Confirm Email** field.
5. Click **Send** page. You will get a message that the email invitation has been sent.

   Note: If the system is unable to locate a pending invtation, you will receive a message asking you to call (866) 908-5940.





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The **Home** page displays the following:

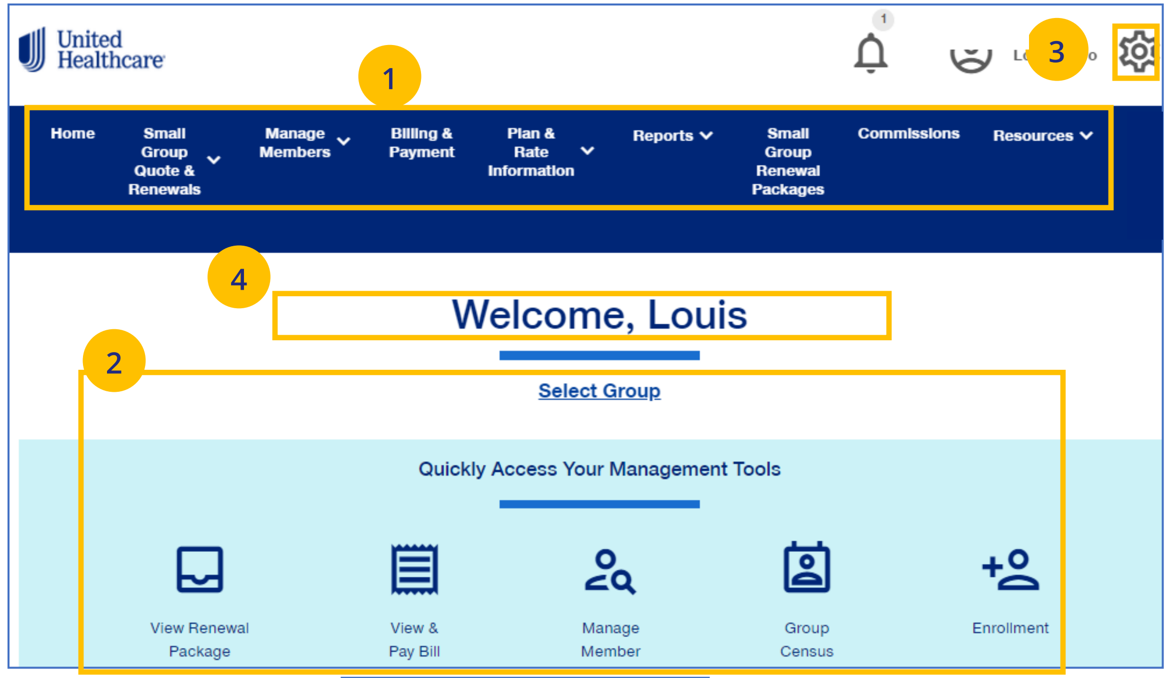
1. **Menu** items across the top of the page
2. **Quick Access links** or "shortcuts" provide easy access to the most common tasks performed
3. **Gear icon** that allows you to do the following:
   - invite others to use uhceservices.com
   - view your personal information
   - change your password
   - view messages or generate reports
   - logout
4. The **Group Selection** option is used initially to select a group. After selection, the group name and group number will be shown.

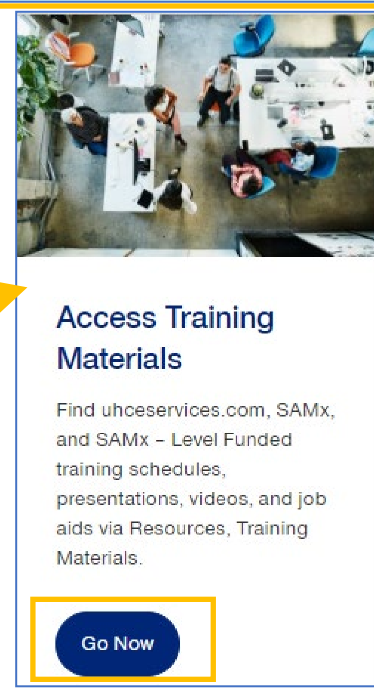
   Note: PEO (Professional Employer Organization) Groups – For PEO Groups, a **Select Child Group** link will display. Click this link to select the Child Group needed.

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

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

Note: Print Capability – You have the ability to print information throughout uhceservices.com. Click the Print icon where displayed to print information.





3 | Quickly Access Your Management Tools

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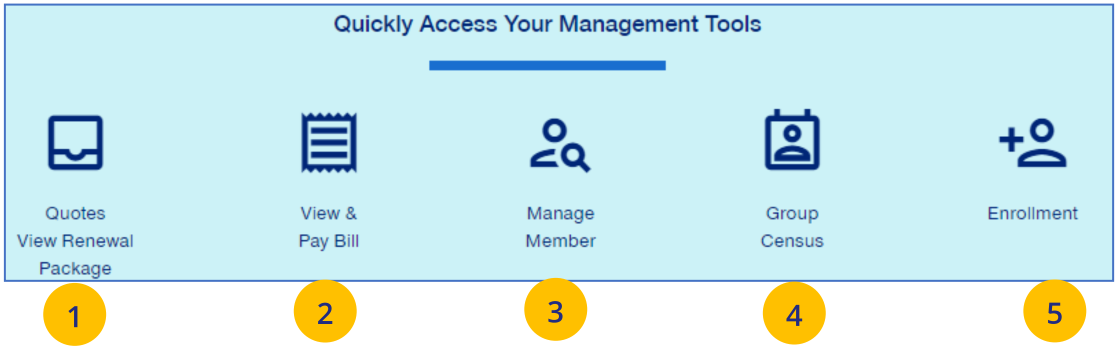
The **Home** page contains quick access icons that offer shortcuts to the most common tasks performed on uhceservices.com.

These shortcuts most often include:

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



4 | Gear Icon

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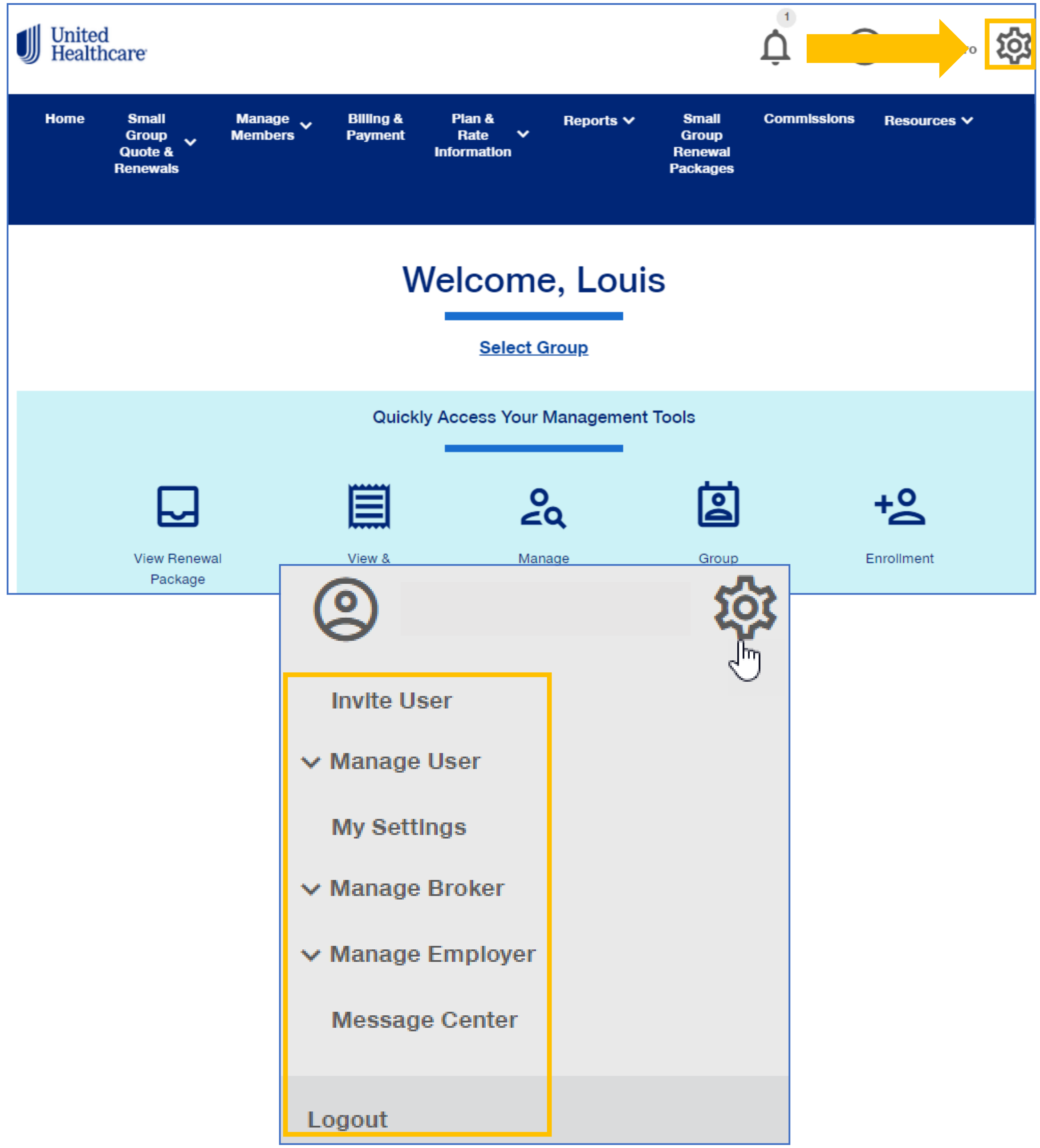
The **gear icon**, located in the upper-right corner of the screen, is used to do the following:

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



4 | Invite User

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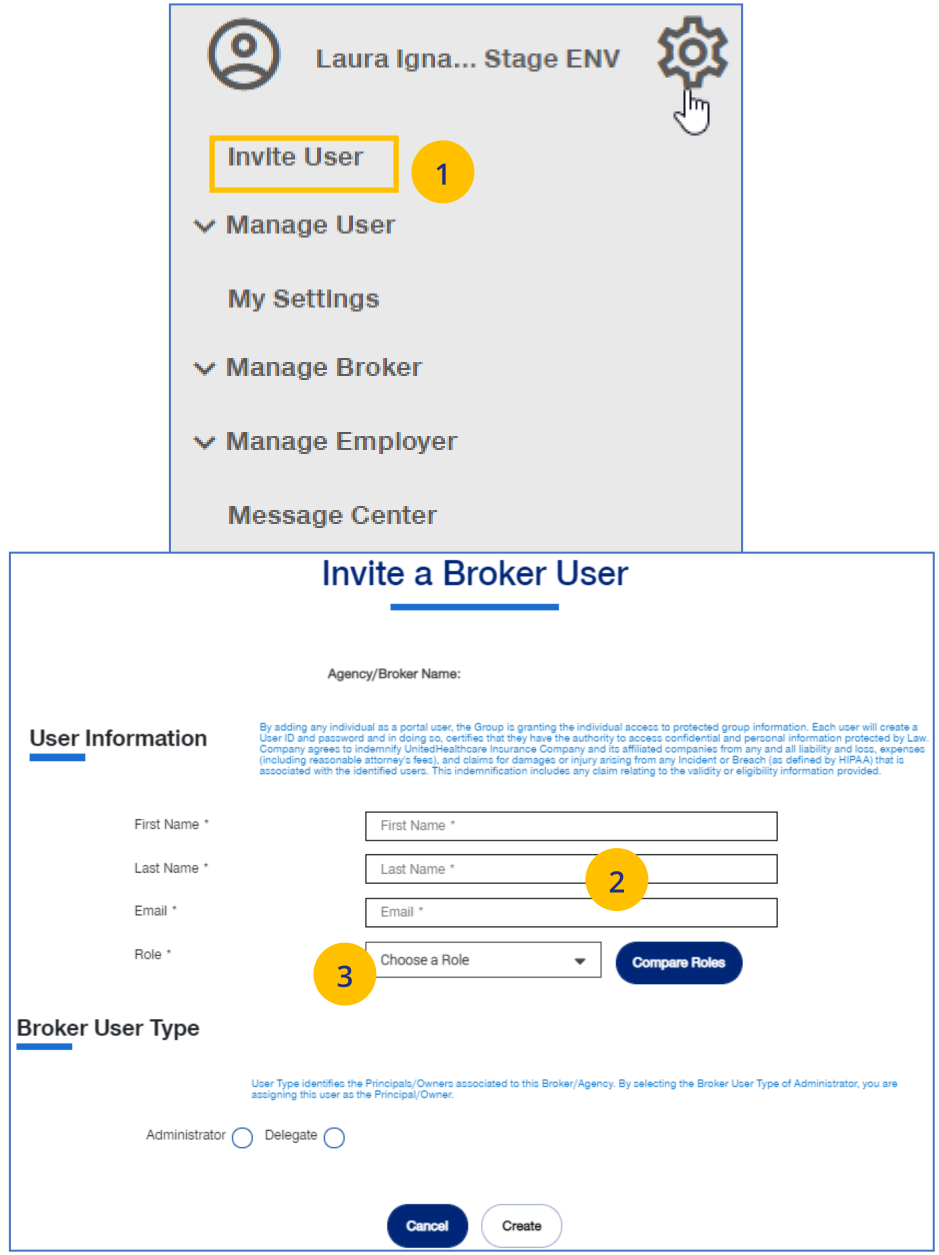
Broker users with user maintenance permissions can give support staff access to uhceservices so they can perform functions on the broker's behalf. To invite a someone to use uhceservices.com:

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

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

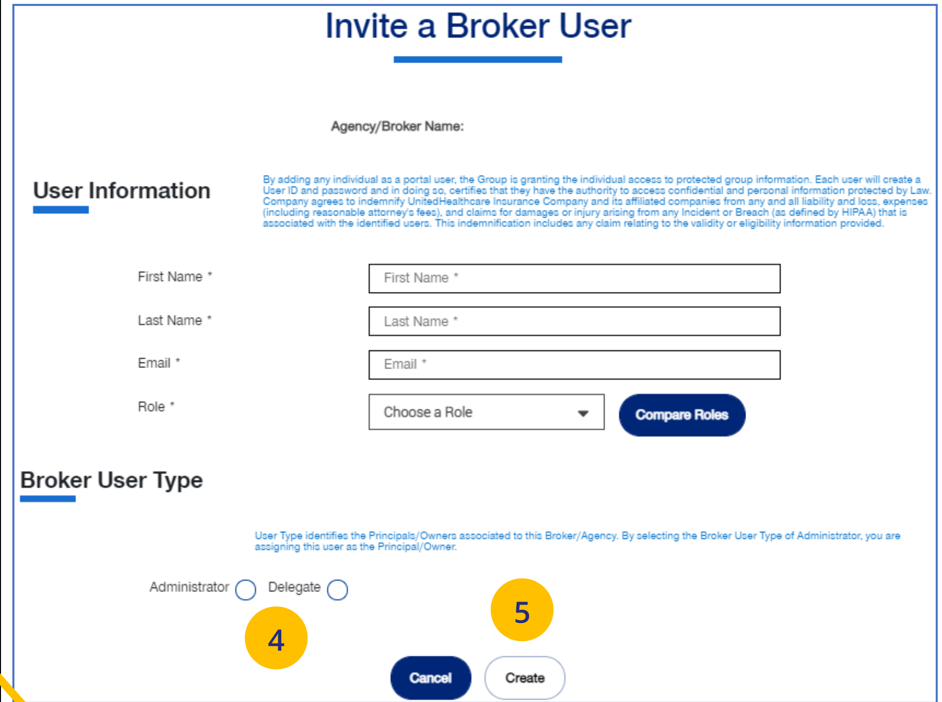
Broker and Employer Roles

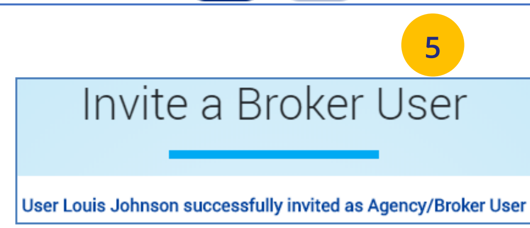
Click here to go an **Appendix** at the end of this document that shows (1) **Broker roles** and permission descriptions, and (2) **Employer roles** and permission descriptions.



4 | Invite User (continued)

4. Indicate whether the invitee is an **Administrator** or a **Delegate** within United eServices. Only the agency/principal owner should be an Administrator. All other agency employees should be a delegate.
5. Click **Create**. A message indicates that your invitation has been successful.





4 | Manage User

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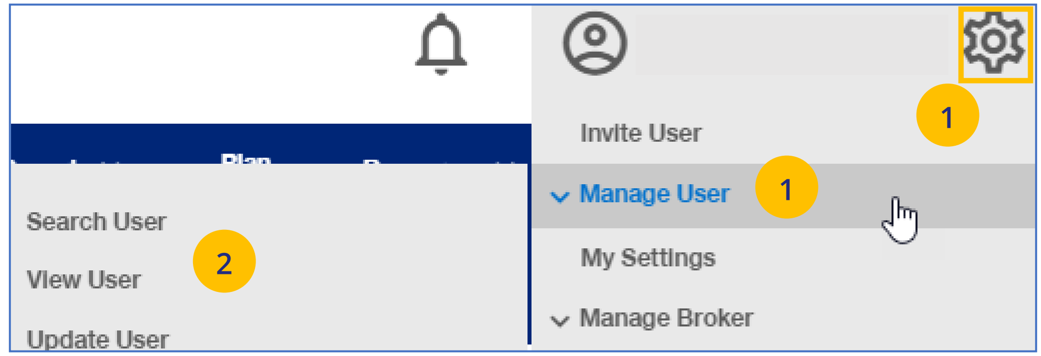
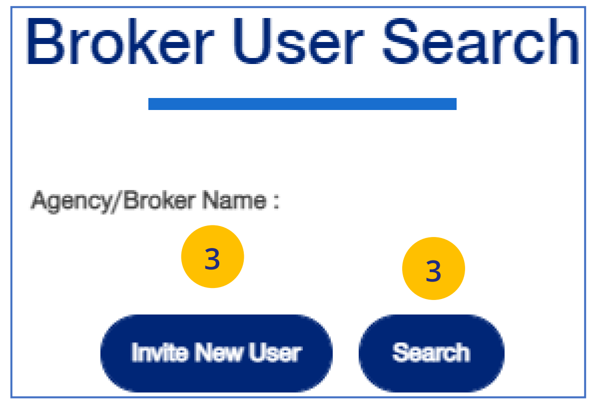
To search for and select a specific user to view or update user information, follow the steps below:

1. Click the **gear icon** and select **Manage User**. You will have three options:
    - **Search User** – You can search for a user or invite a new user (if you have that capability)
    - **View User** – You can search for a user or invite a new user (if you have that capability)
    - **Update User** – You can search for a user or invite a new user (if you have that capability)
2. Select one of the options to display the **Broker User Search** screen.
3. You have two options:
    - Click **Search**. The search results will display with the list of users.
    - Click **Invite New User**. The **Invite a Broker User** screen displays. Complete the information and click **Create**.





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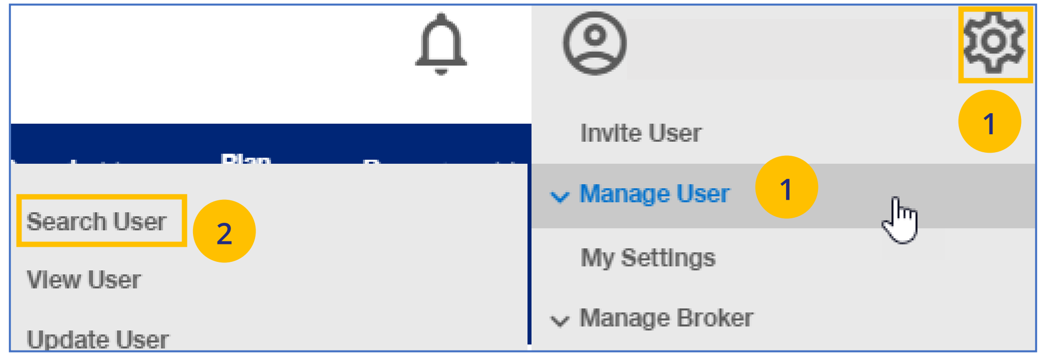
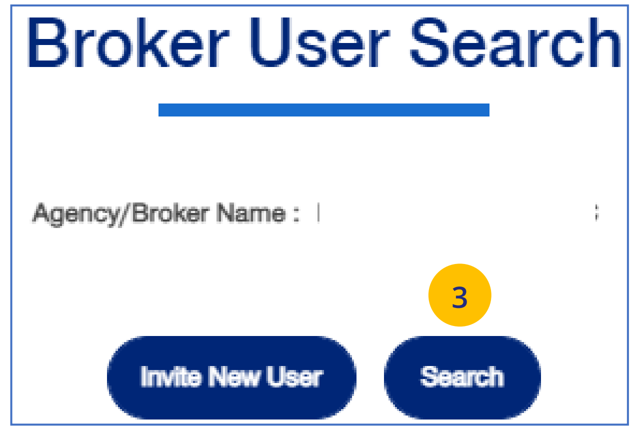
4 | Re-Invite a User

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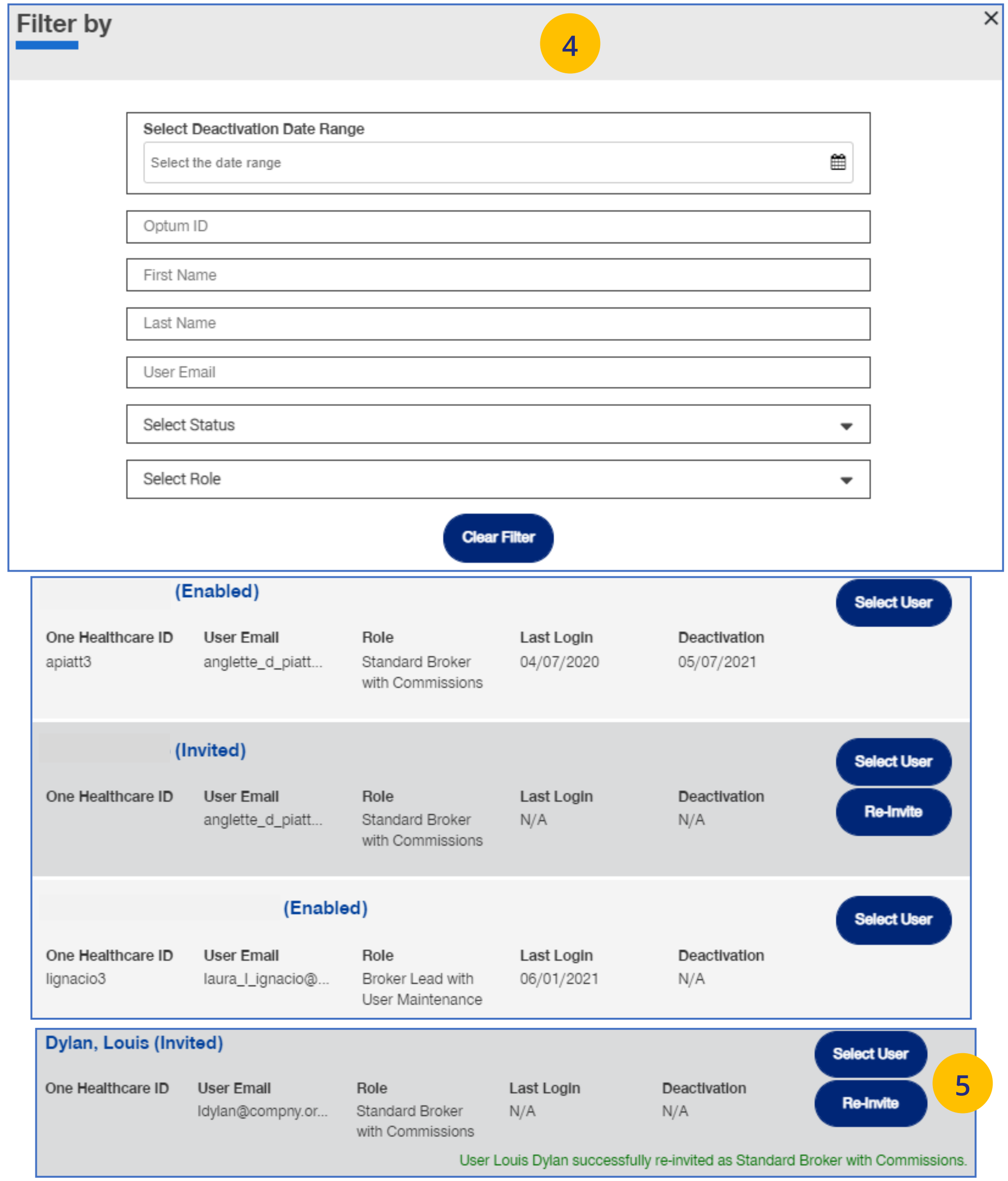
To re-invite a specific user to view or update user information, follow the steps below:

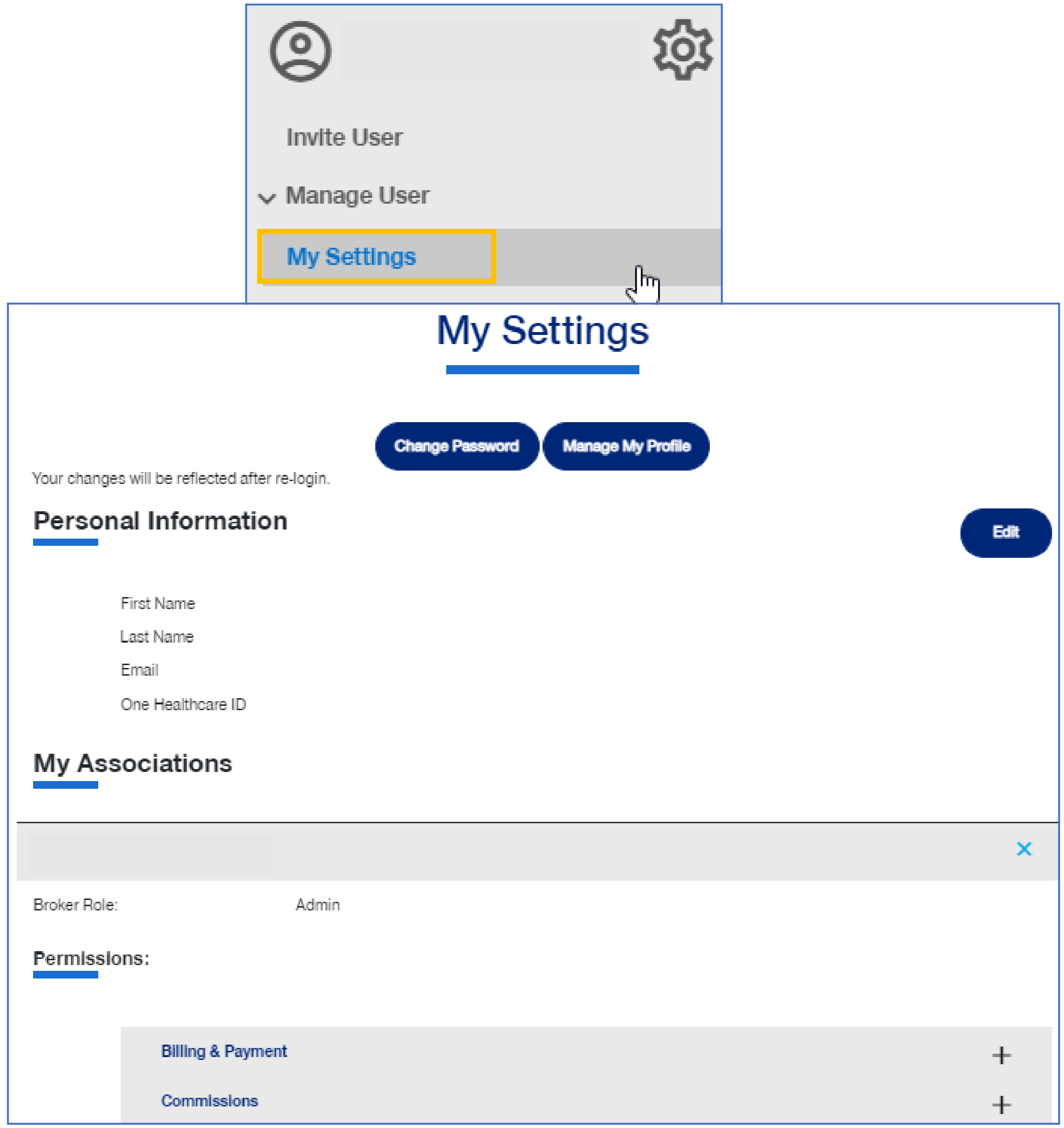
4. In the **Filter by** area, click the plus sign to expand the filter fields. Search for the user you need using the filter fields
5. Click on **Re-Invite**. A message displays indicating the “re-invite” was successful. The user will receive a new invitation email.



4 | My Settings

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

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



4 | Manage Broker

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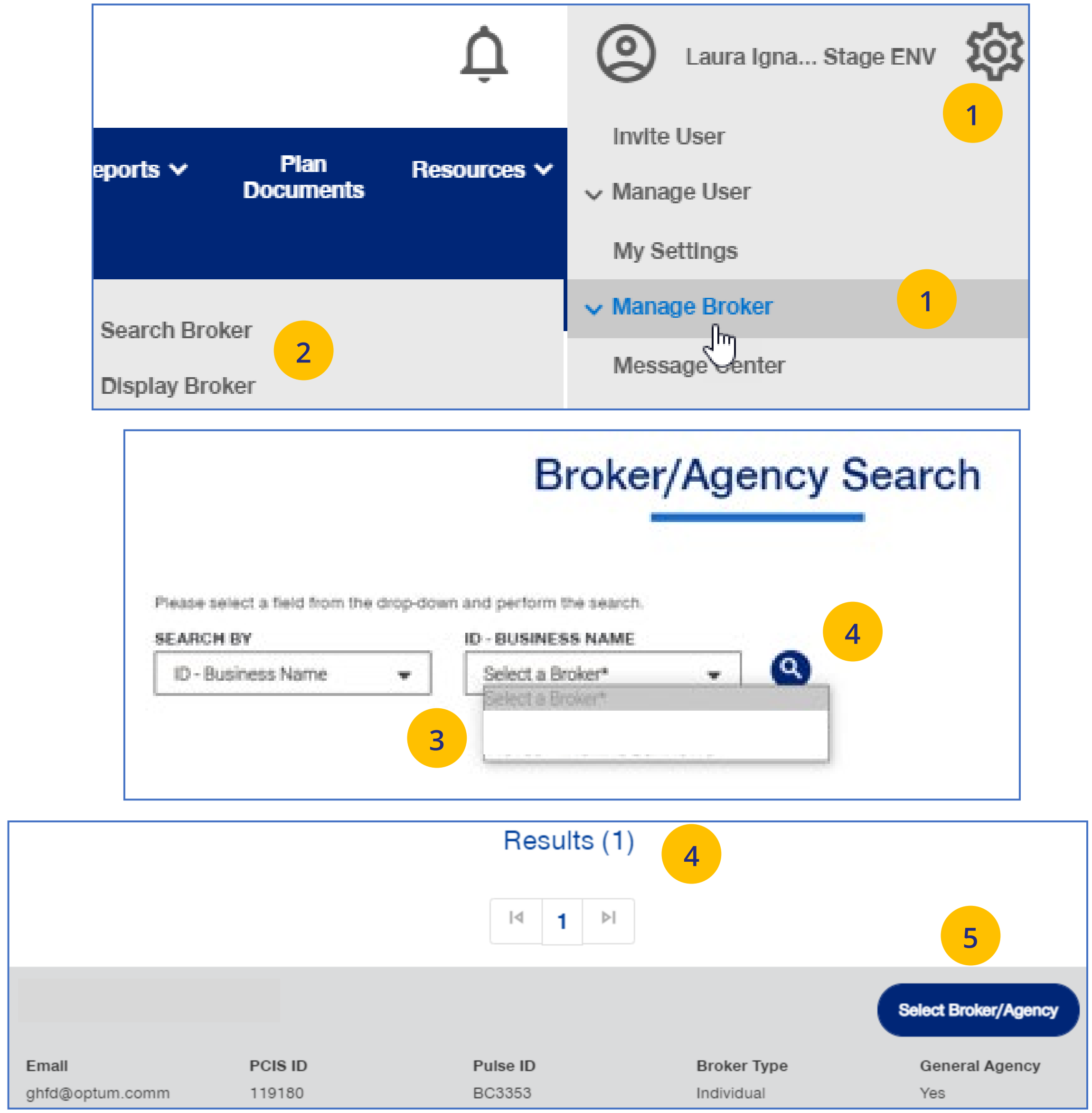
To search for a Broker, follow the steps below:

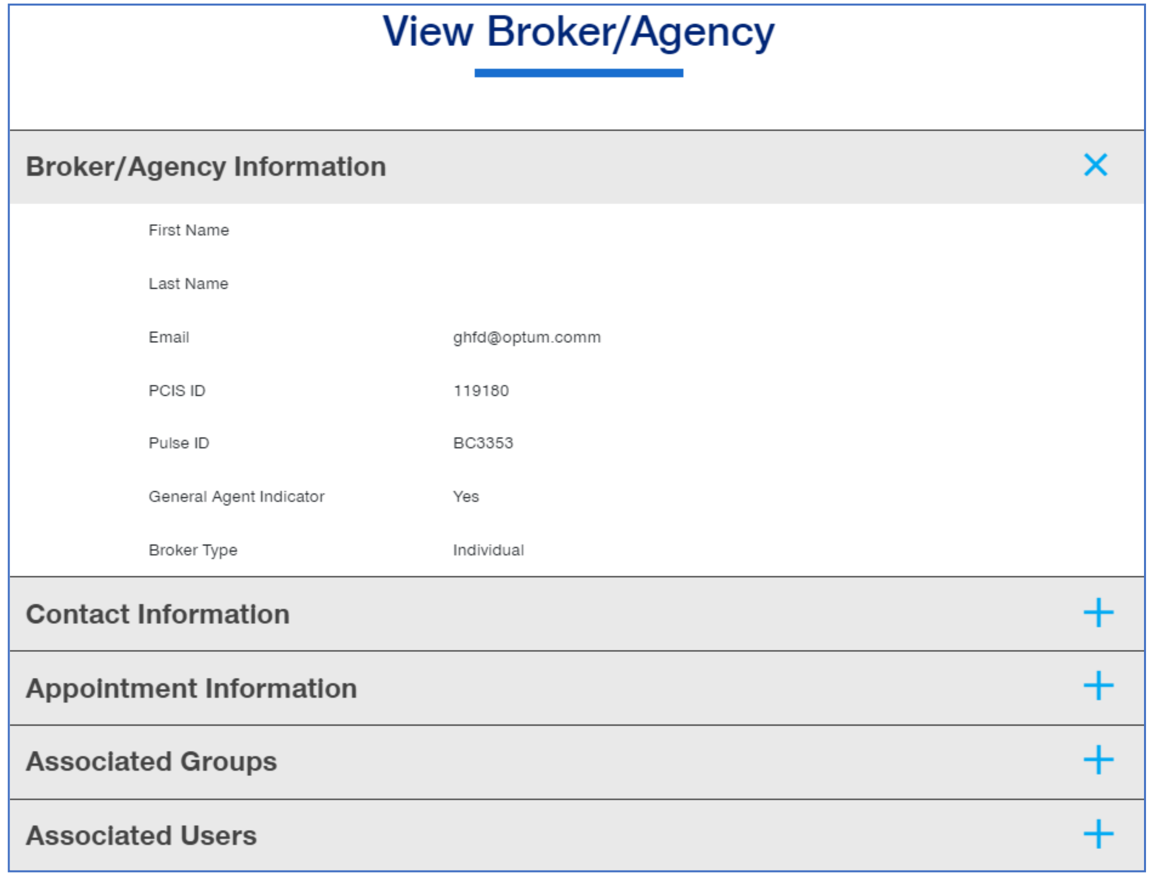
1. Click the **gear icon** and select **Manage Broker**.
2. Select either **Search Broker** or **Display Broker**. The Broker/Agency Search screen displays.
3. Select the broker from the dropdown.
4. Click the **Search** icon. The search results will be shown. Scroll down to see all the results.
5. Click **Select Broker/Agency** for the broker information you need. The **View Broker/Agency** screen displays with information on the broker.



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

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

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



4 | Manage My Profile

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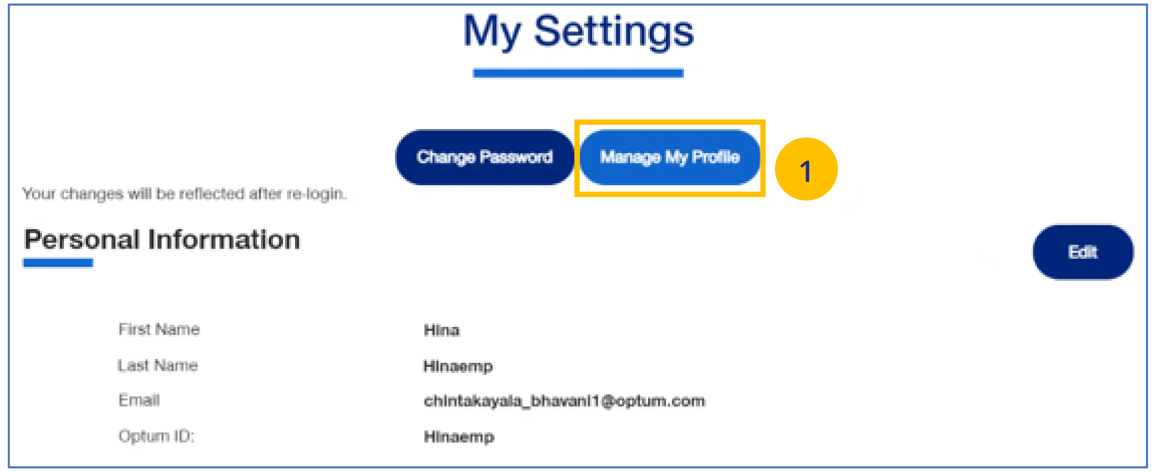
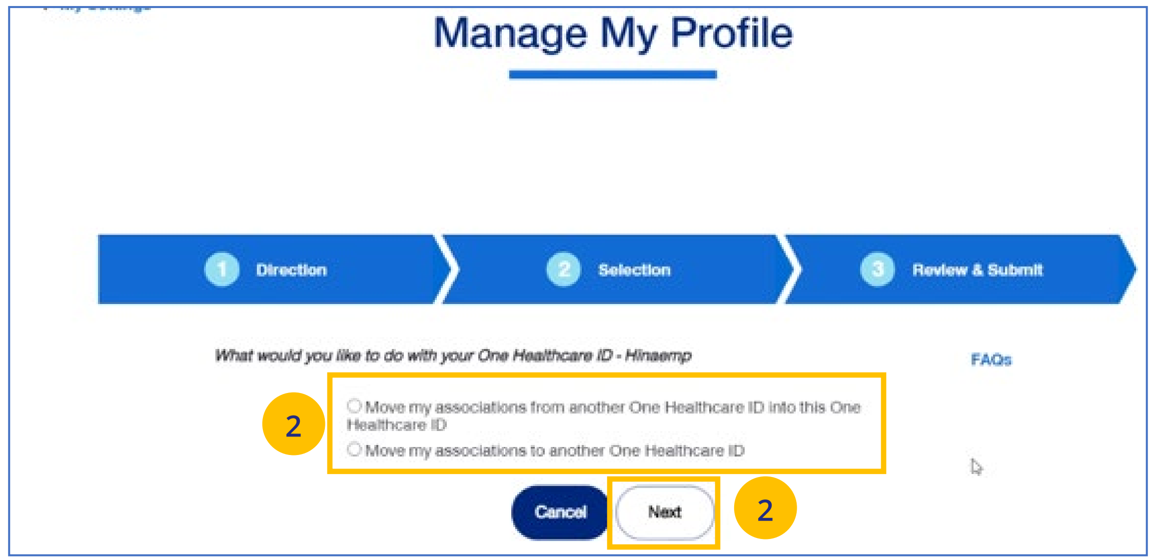
To manage your One Healthcare IDs or to move Associations, follow the steps below:

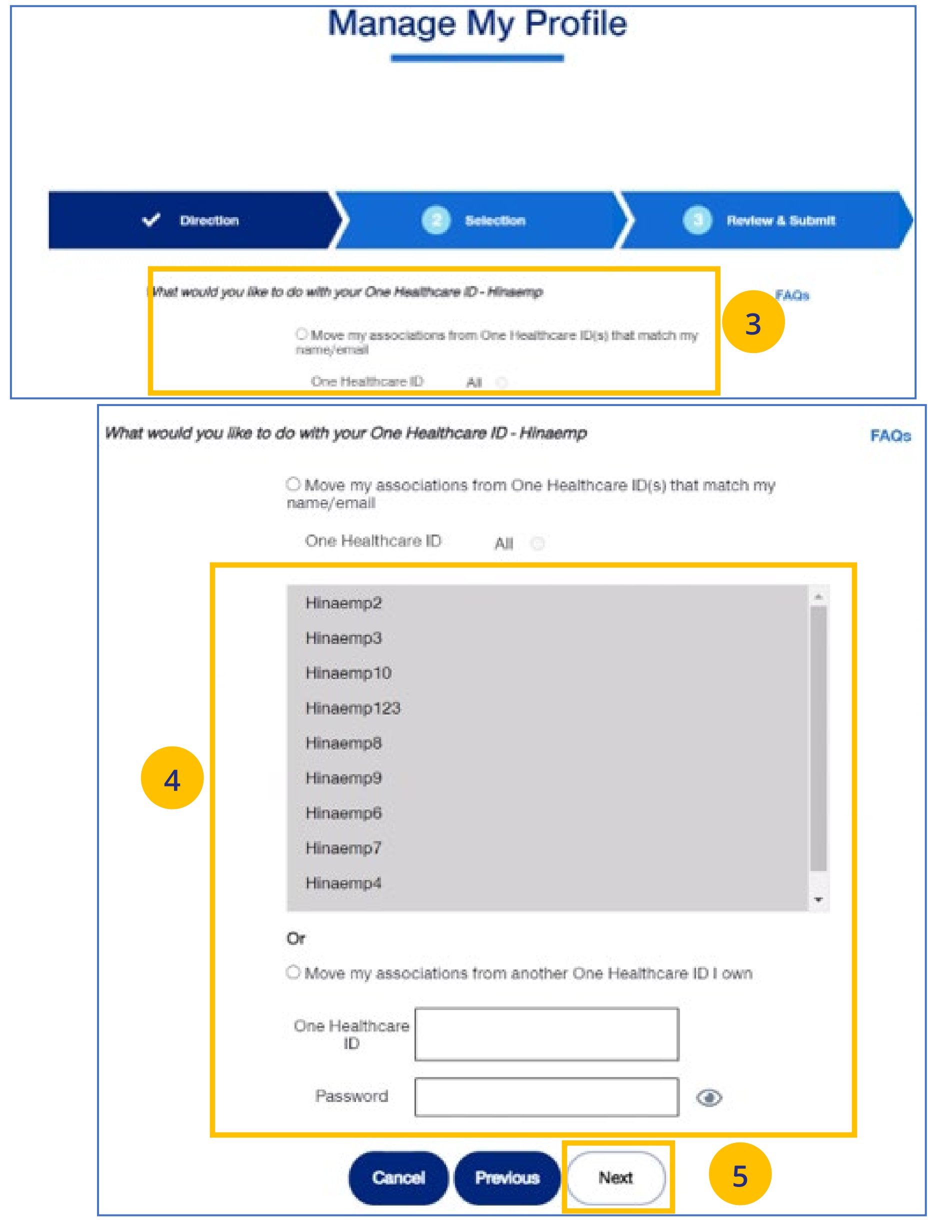
Note: Click here for FAQs related to this topic.

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**.





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**.



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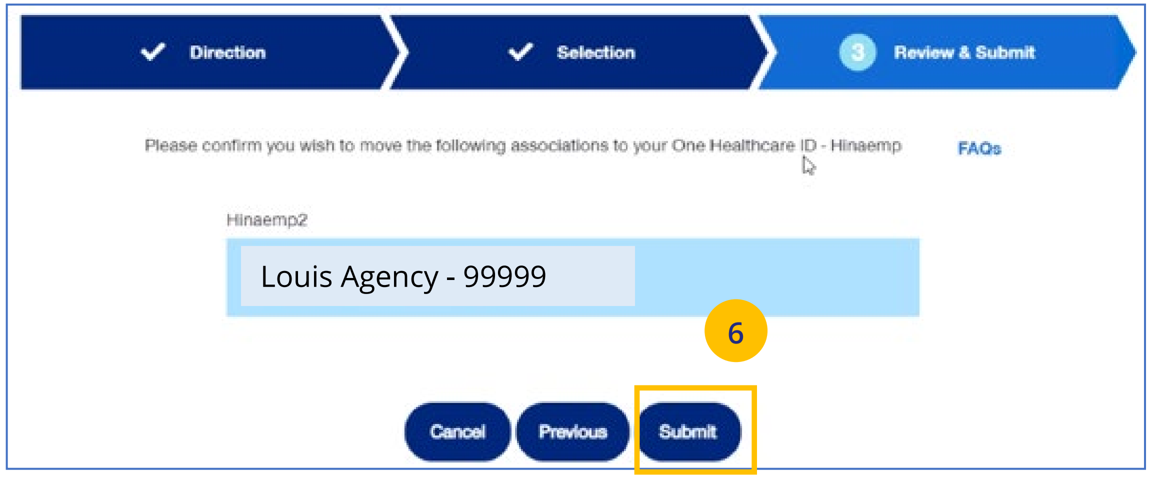
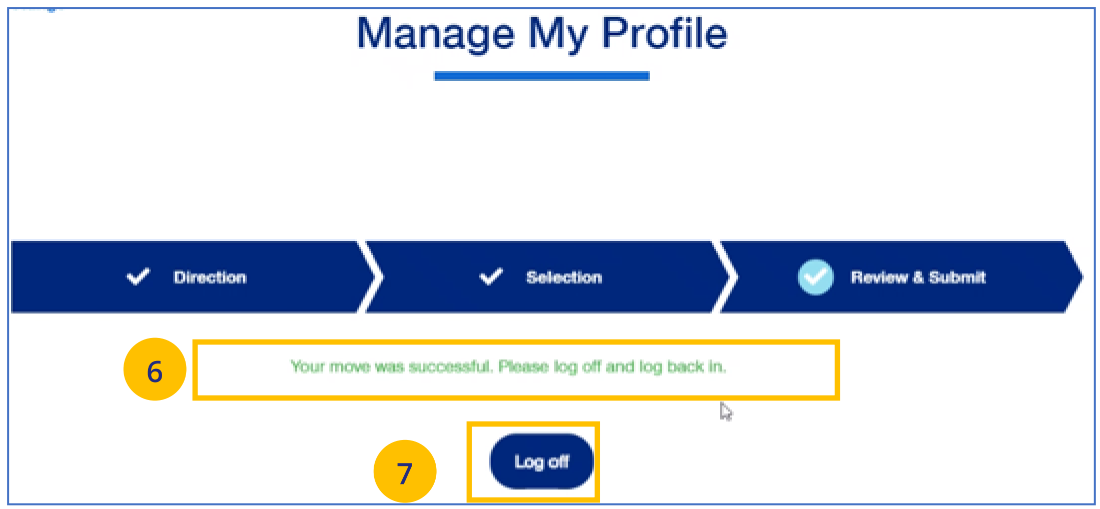
6. Click **Submit**. A success message displays.
7. Click the **Log off** button and log back in.





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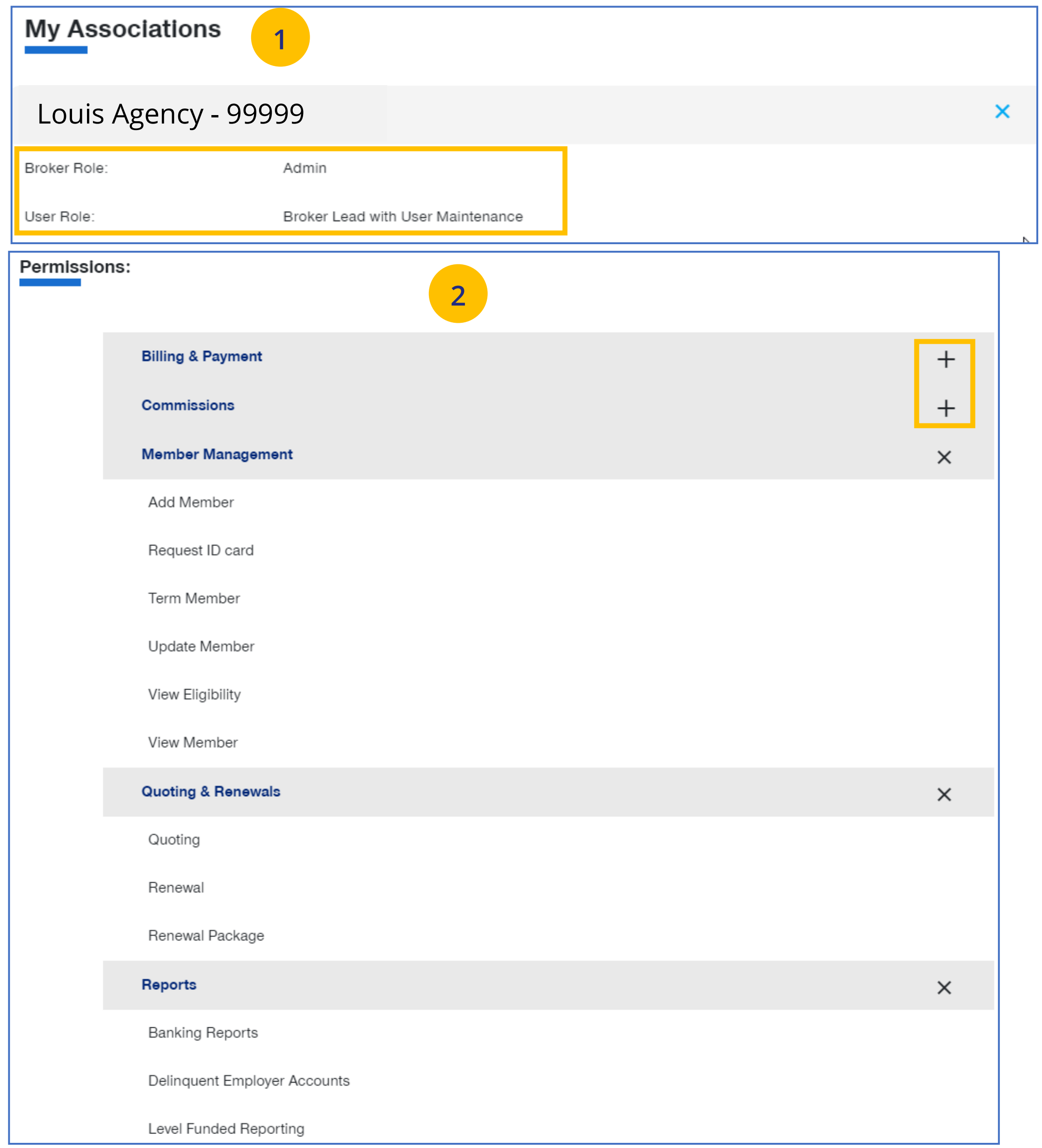
4 | Roles and Permissions (My Associations)

You can use **My Settings** to view your specific roles and permissions and to view what information you have access to in uhceservices.

1. Under **My Settings**, scroll down to the **My Associations** section. You will see your specific **Broker Role** (Admin or Delegate) and your **User Role**.
2. Scroll down to **Permissions** to view all the tasks you can perform in uhceservices.
   - Click the plus sign + to expand the category to view specific permissions within that category.

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



4 | View and Update Broker Contact Information

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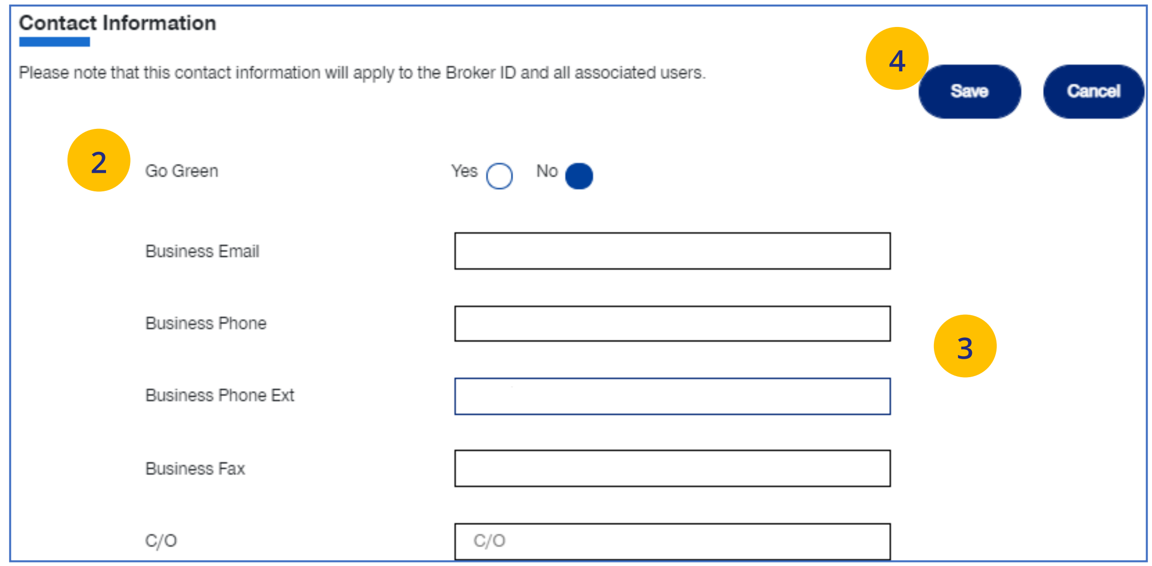
To update broker contact information, follow the steps below:

1. Click the **Edit** button in the **Contact Information** section to display the Contact Information screens.
2. In the **Go Green** field:
   - Click **Yes** if you want the renewals you are updating for the broker accessible in online form only (paper renewals will no longer be sent).
     Note: Only a **Broker Admin** can update the **Go Green** indicator.
   - Click **No** if you want the information in paper form.
3. Enter information in any of the fields with the boxes.
4. Click **Save.** The following message will be shown: **“Updates have been submitted successfully. Your changes may not be reflected immediately.”**



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

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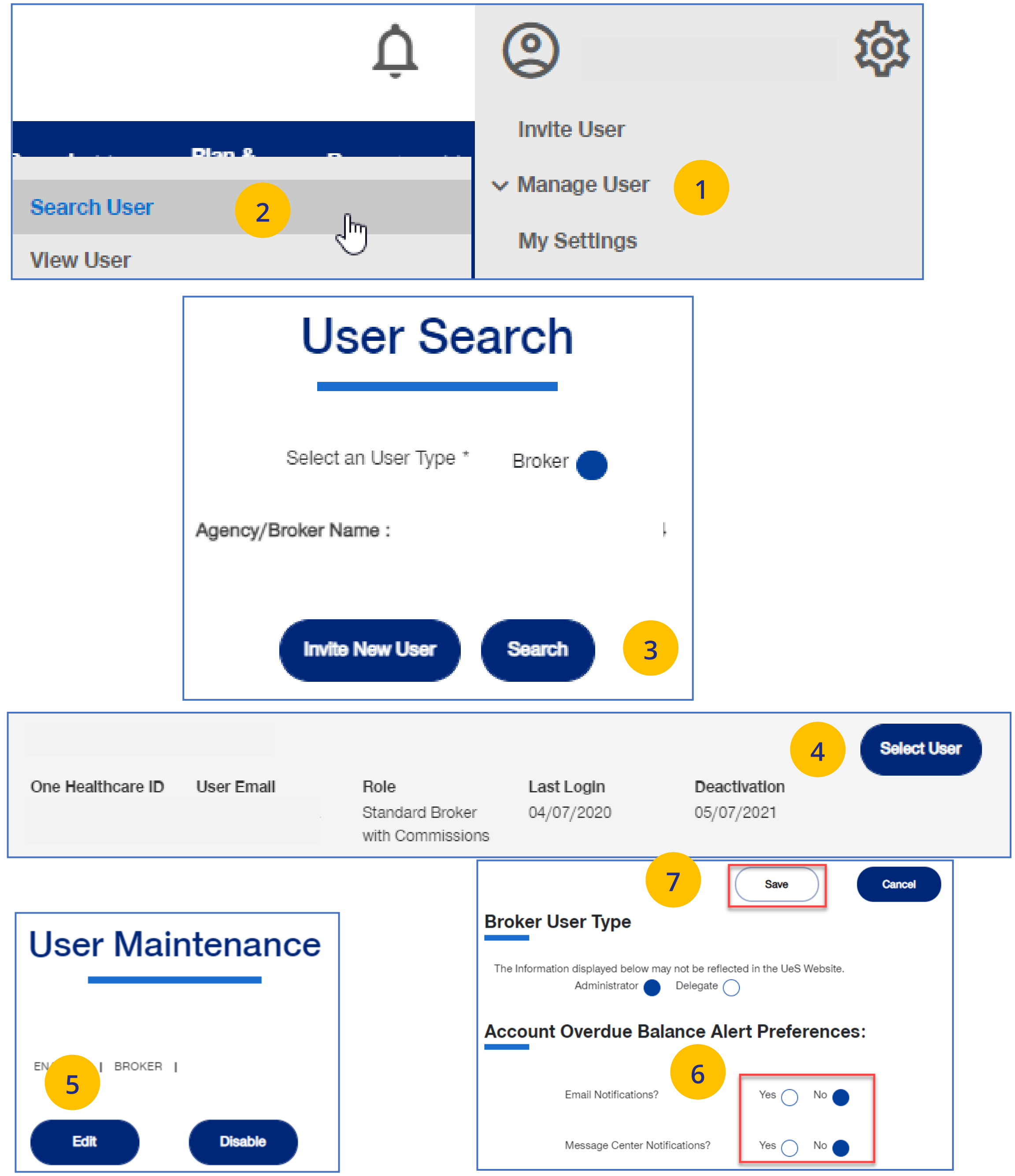
You can update a broker user's account overdue balance alert preferences through Manage Broker. To do this, follow the steps below:

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



4 | Message Center

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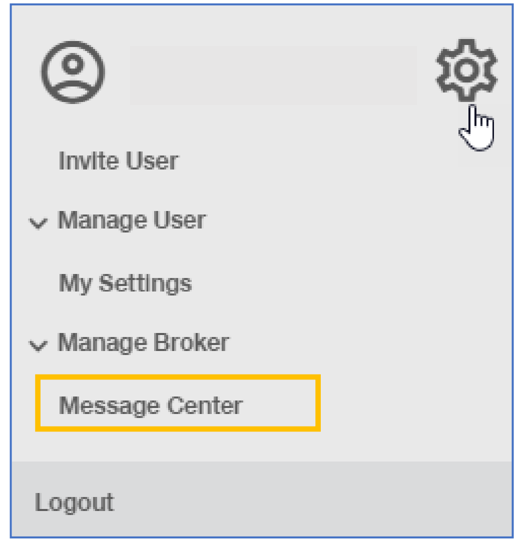
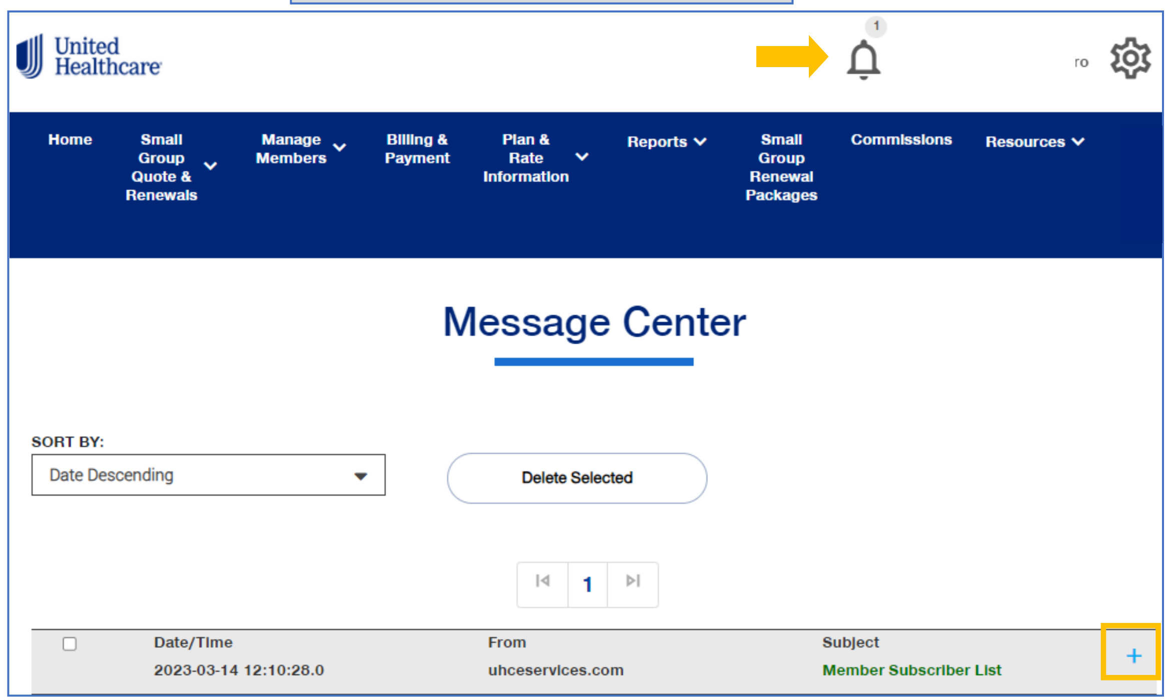
The **Message Center** displays messages and links to reports that have been generated.

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

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





5 | Group Selection

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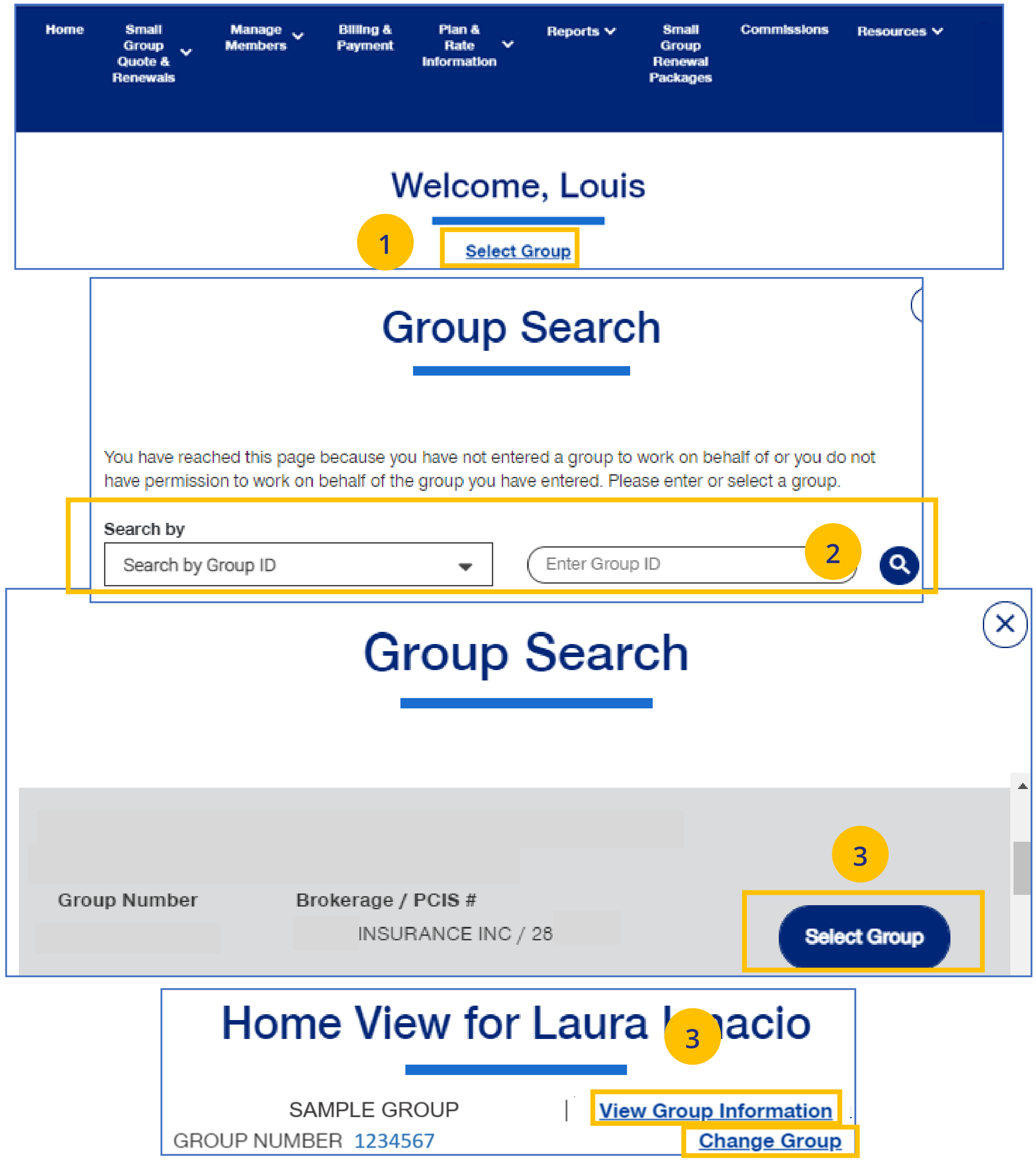
To select a group from the Home page:

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

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

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

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



5 | Group Selection: PEO Groups

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

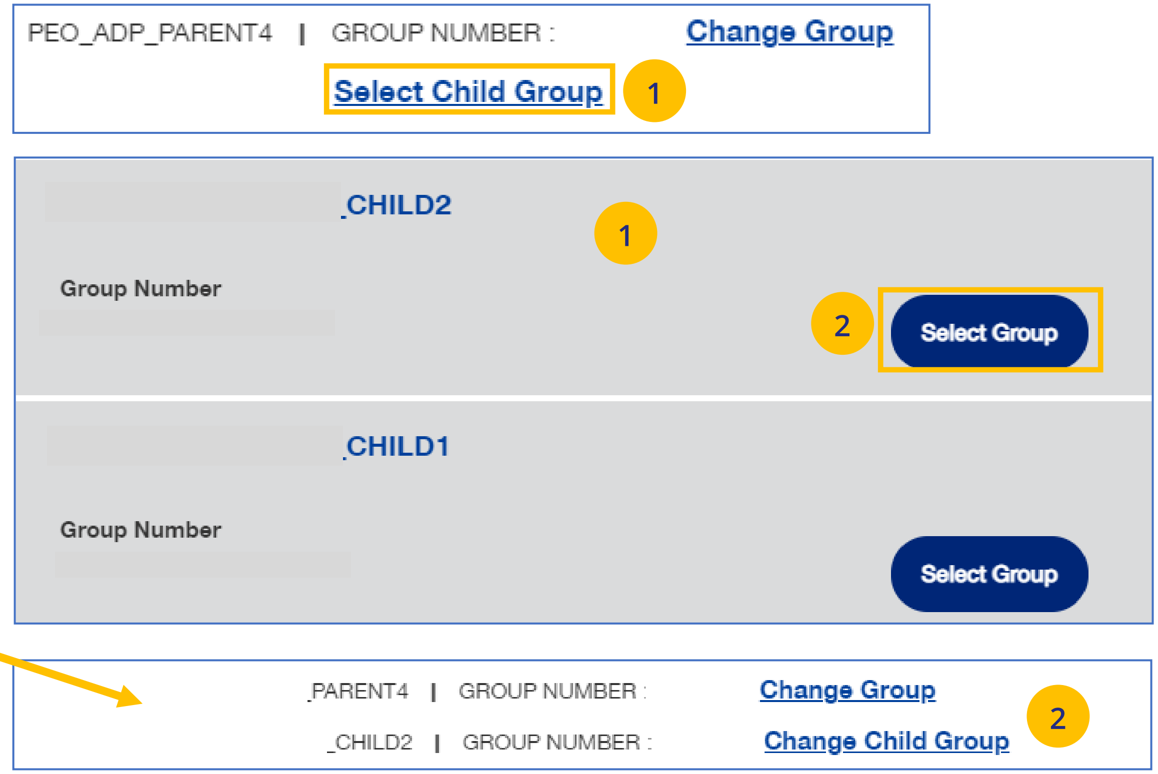
Note: PEO Groups do not apply to **UnitedHealthcare HMO**.

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

   Note: A Parent Group can have one or mire 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**.



6 | Small Group Quoting & Renewals

The **Small Group Quoting & Renewals** tab will direct you to the correct quoting/enrolling and renewal tool, depending on funding, market, etc. Other common tools are provided under Quick Links.

1. **Help Me Decide** allows you to answer questions that will help you select the right tool for your Quote or Renewal.
2. **Quick Links** provides access to the following:
   - Small Group Renewal Packages
   - Upload Documents
   - United eServices (UeS)
   - MyAllSavers
   - SAM
   - UHC Benefit Services (COBRA)
   - Employer eServices
3. **Small Group Quoting and Renewal** provides links to quoting and enrolling and renewals (for Fully Insured and Level Funded) in the following applications:
   - SAMx
   - SAM
   - MyAllSavers

6 | Help Me Decide

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The **Help Me Decide** link allows you to answer questions that will help you select the right tool for your Quote or Renewal.

To do this, follow the steps below.

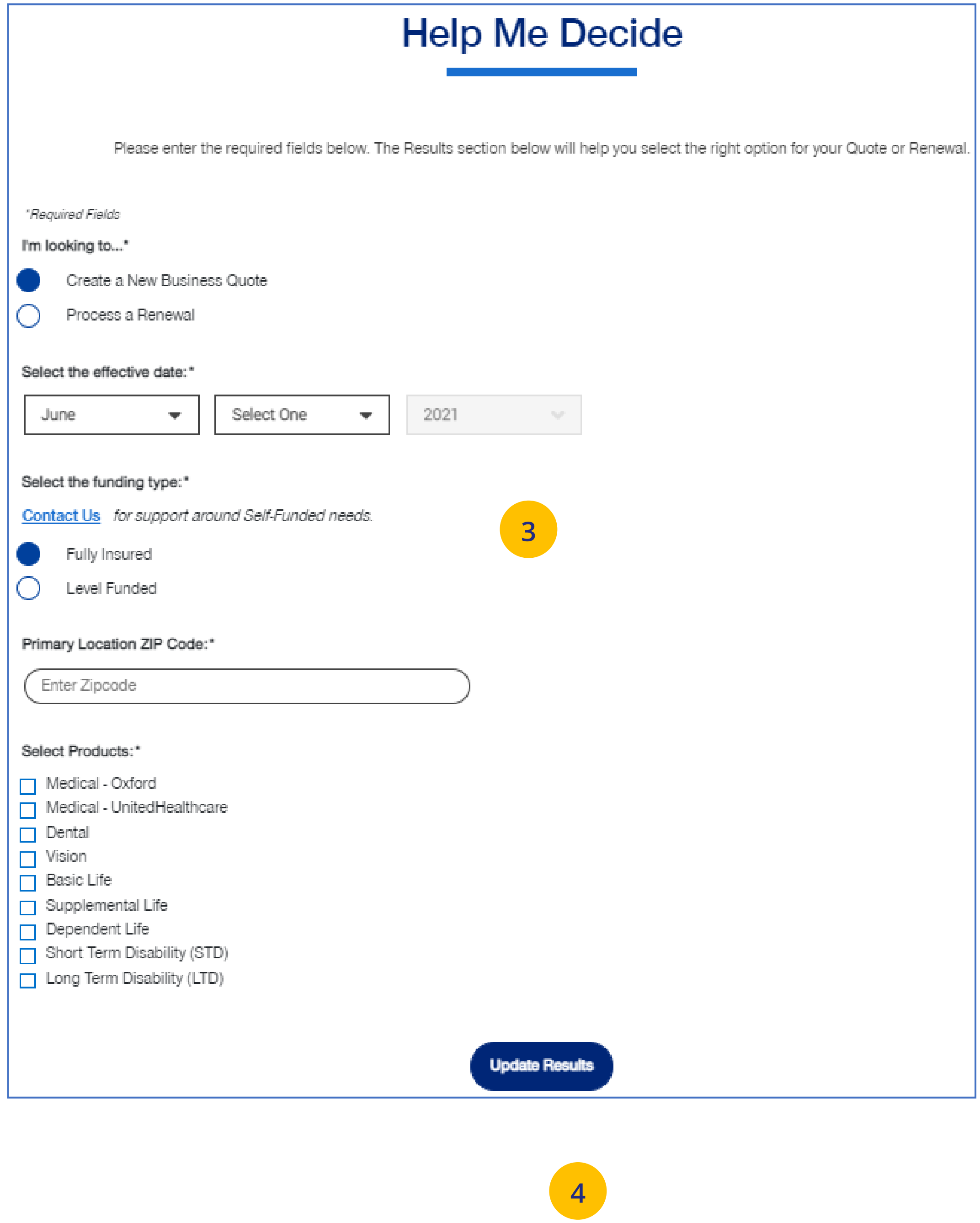
1. Click the **Small Group Quoting & Renewals** tab. The **Small Group Quoting & Renewal** screen displays.
2. Under **Help Me Decide**, click **Get Started**. The **Help Me Decide** screen displays.

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

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

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

4. Click **Update Results**. The **Results** screen displays with a link to the request that fit the criteria you entered.



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

6 | Quick Links: Small Group Renewal Packages

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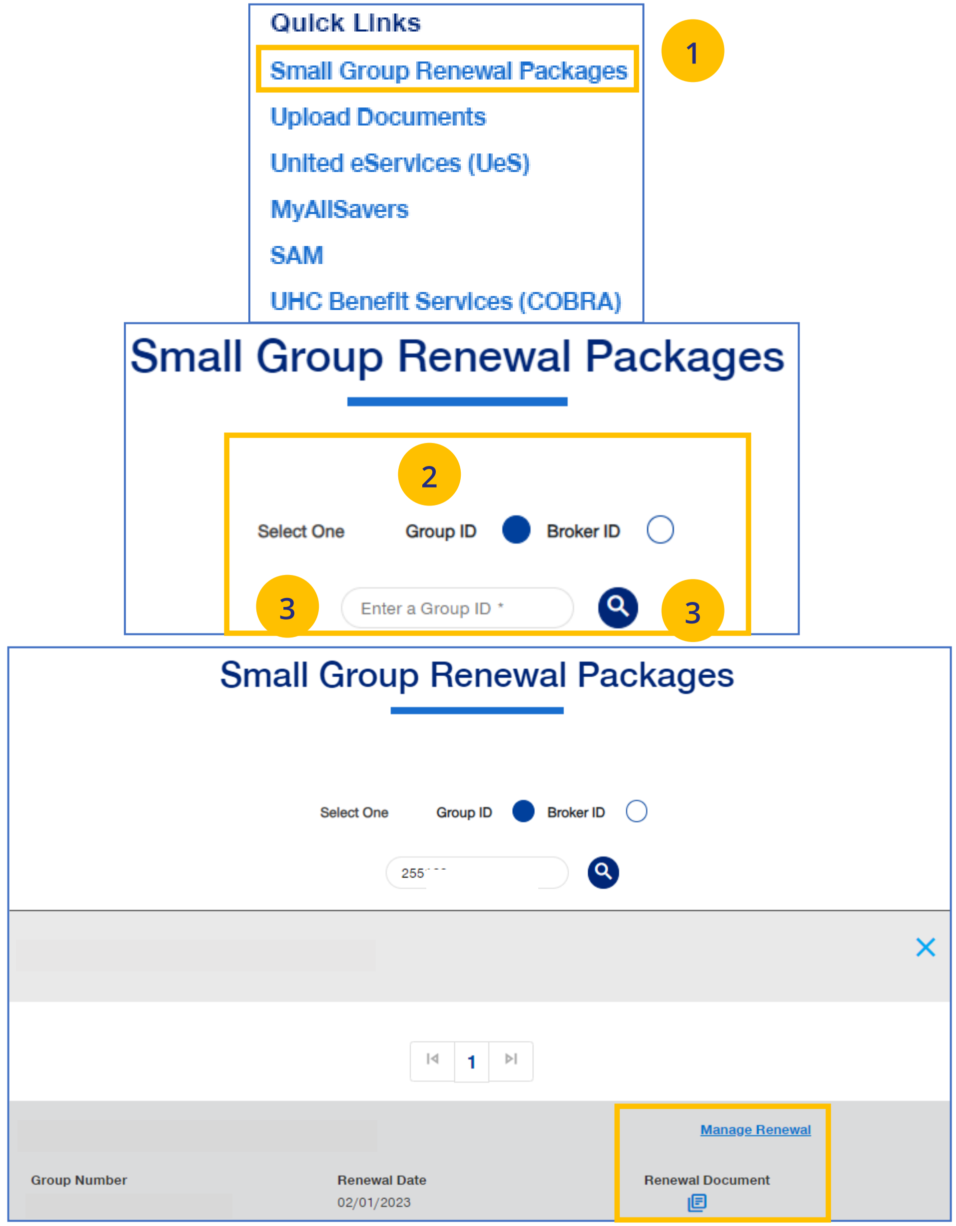
The **Small Group Renewal Packages** link is used to view the renewal documents for groups or brokers.

1. Click **Small Group Renewal Packages**. The **Small Group Renewal Packages** search screen displays. You can search by **Group ID** or **Broker ID.**

To Search by Group ID:

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

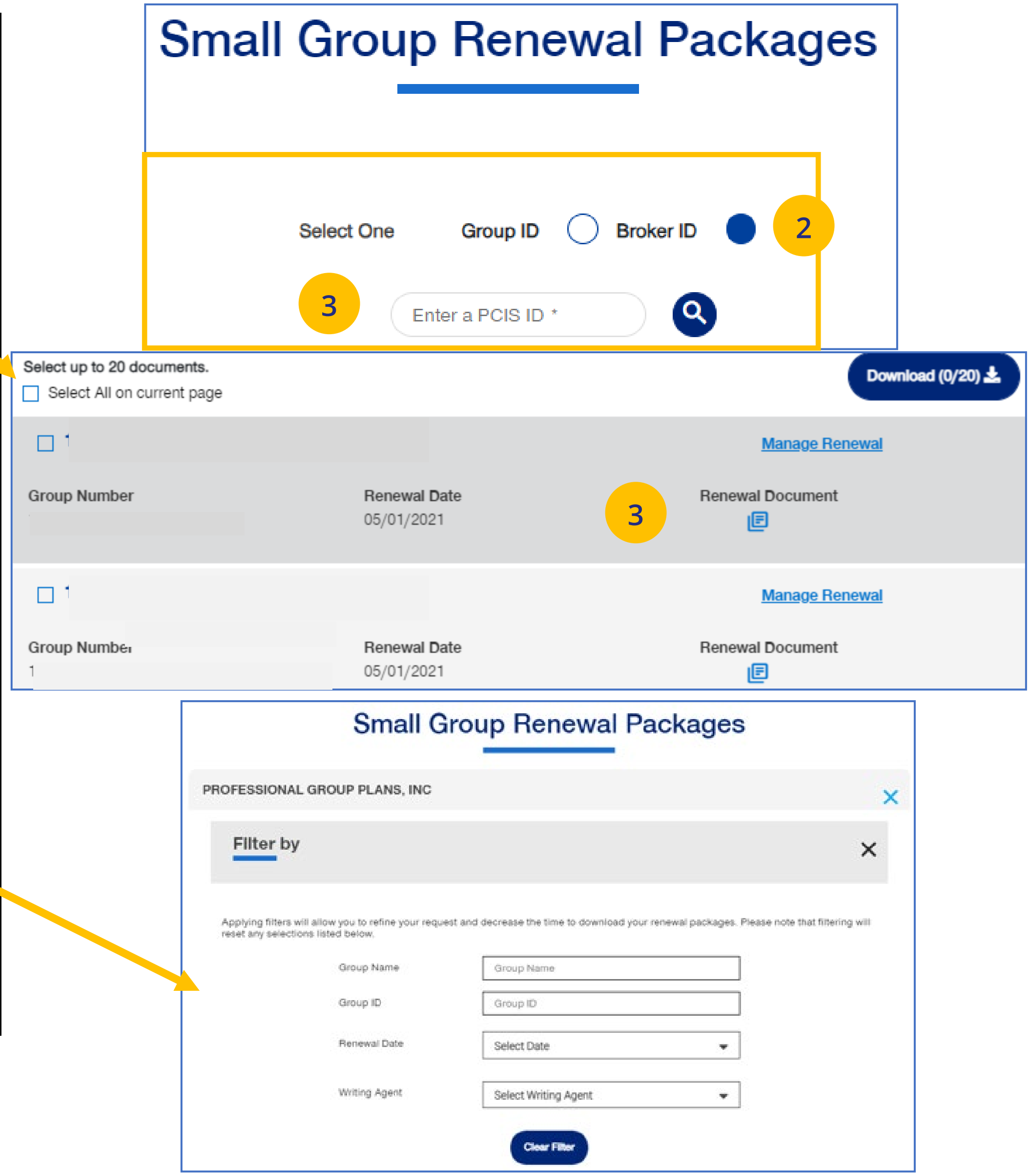


To Search by Broker ID:

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

   Note: Multiple Packages – When you search by **Broker ID**, multiple packages can return. Place a checkmark in the boxes for the renewal documents you need to view. You can also put a checkmark in the "Select" box at the top of the window to view all the renewal documents shown on the page. There is a limit of 20 groups per page and a total of 1,000 renewal packages at one time. You must download the groups listed on one page at a time.

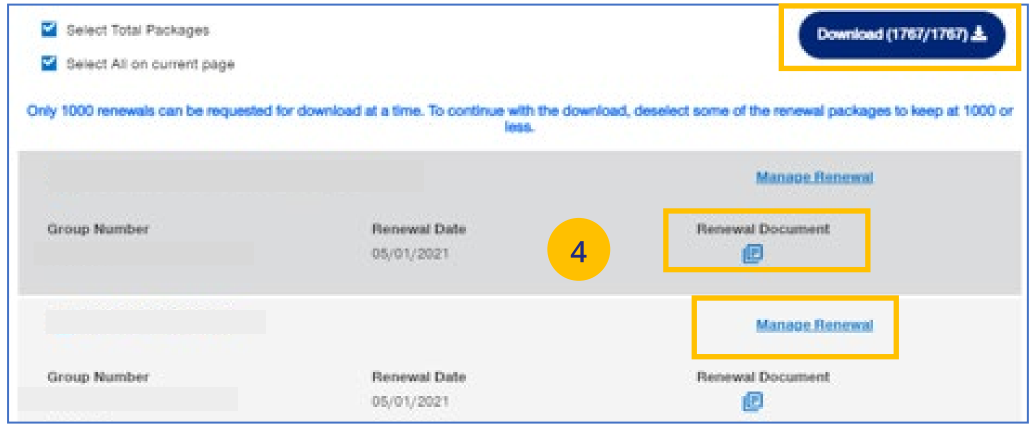
   Note: Filter Results - You can also "filter" the results to narrow your search results. Using filters is recommended for agencies with many renewals. You can filter by **Group Name**, **Group ID**, **Renewal Date** or **Writing Agent.**

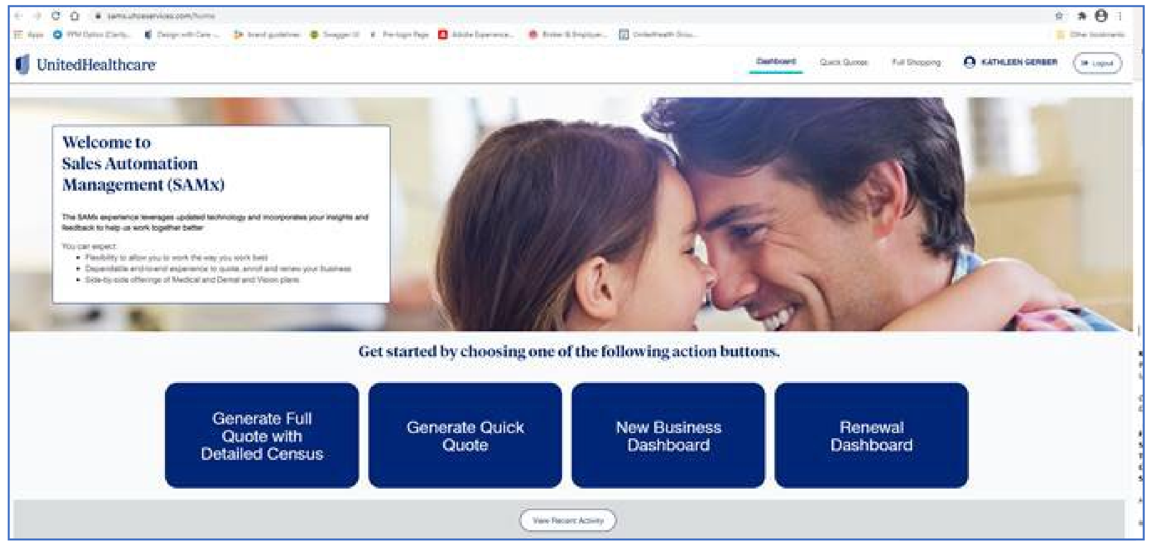


6 | Quick Links: Small Group Renewal Packages (continued)

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

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





6 | Quick Links: Upload Documents

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

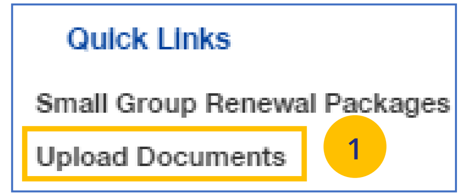
Note: **Upload Documents** is not applicable to **UnitedHealthcare HMO**.

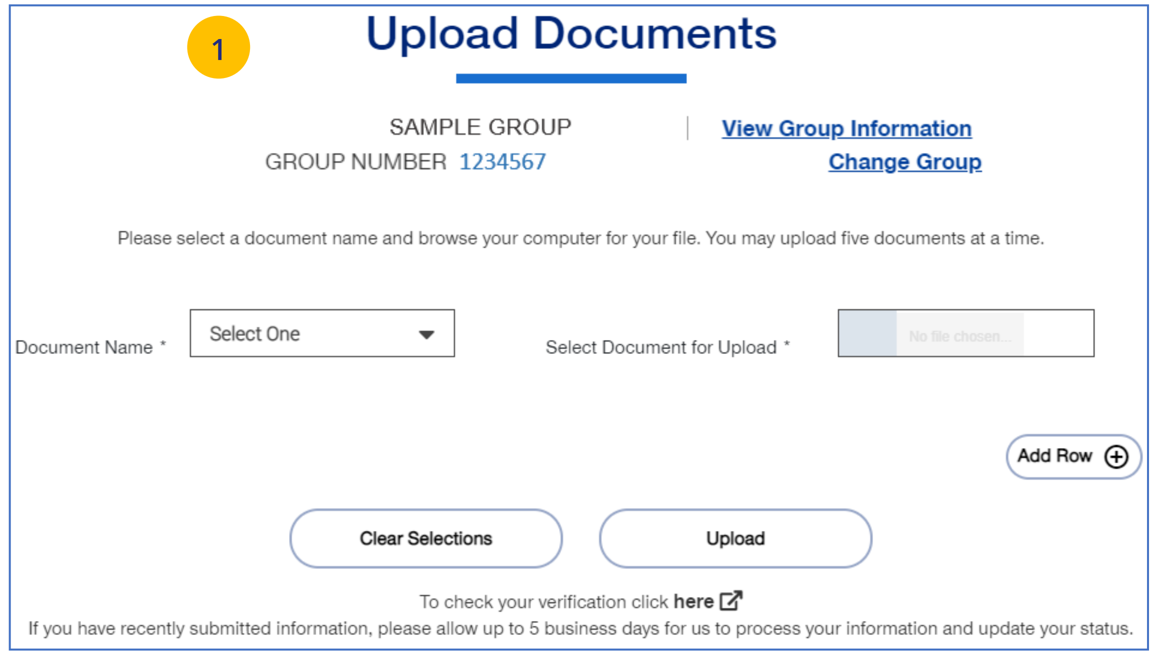
Note: Access to **Upload Documents** is available only to users with the following roles:

- Internal Portal Admin
- Internal Risk Management
- Internal SAMx Admin
- Internal Service
- Internal Underwriting
- Internal Sales
- Employer Lead
- Employer User
- Broker Lead with User Maintenance
- Standard Broker without Commissions
- Broker View Only
- Standard Broker with Commissions

Note: If you have not entered a Group Number previously, you will be asked to search for and find your Group prior to selecting the document to upload.

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





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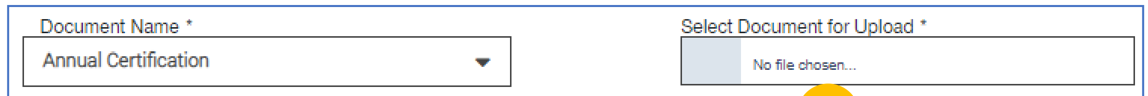
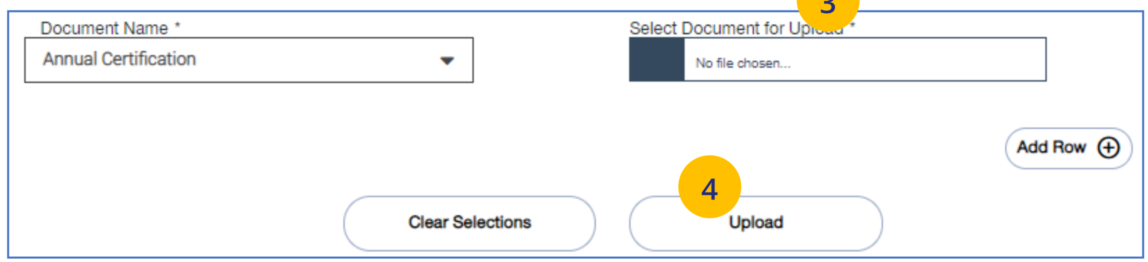
6 | Quick Links: Upload Documents (continued)

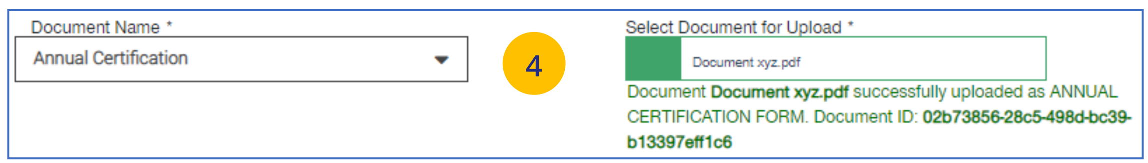
2. Use the **Document Name** drop-down to select the document you need to upload.

3. Click the **Select Document for Upload** box and attach the document for upload. Repeat this if needed by clicking **Add Row**. You can upload up to five documents at one time.

4. Click **Upload**. A “successfully uploaded” confirmation message will display.





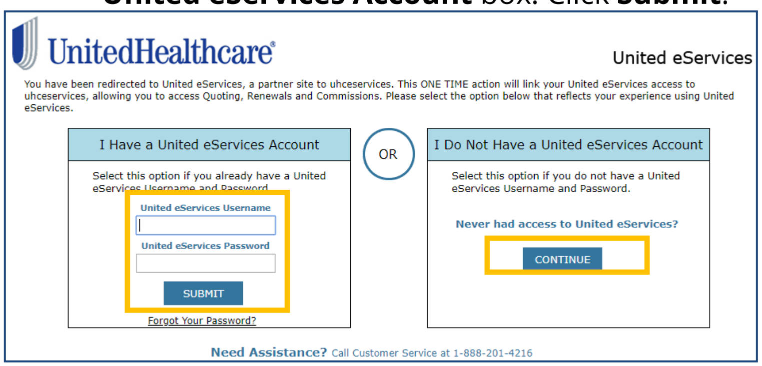


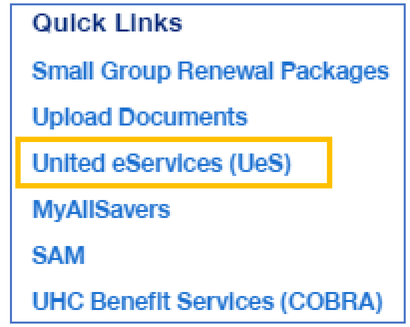
6 | Quick Links: United eServices (UeS)

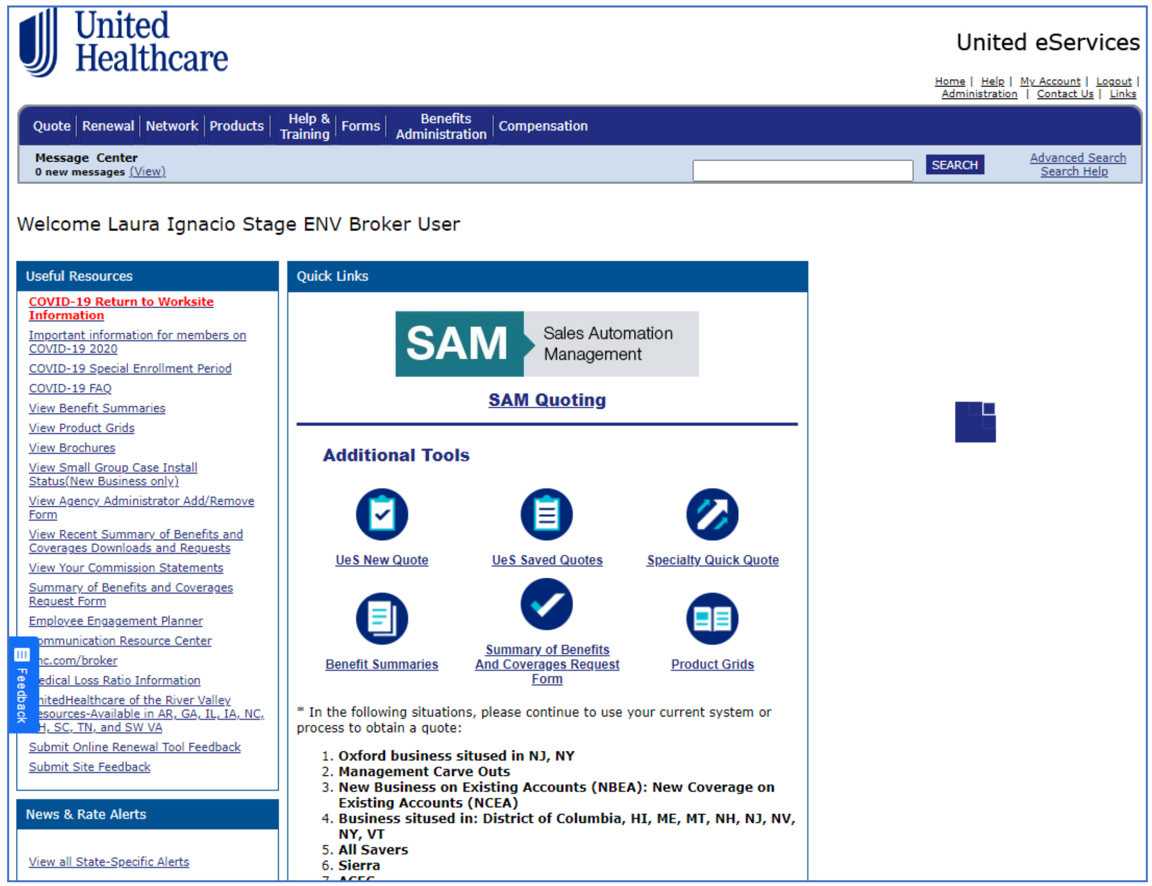
When you click the **United eServices (UeS)** link, you will be taken to the **United eServices** home page.

Note: First Time Access to UeS for Brokers:

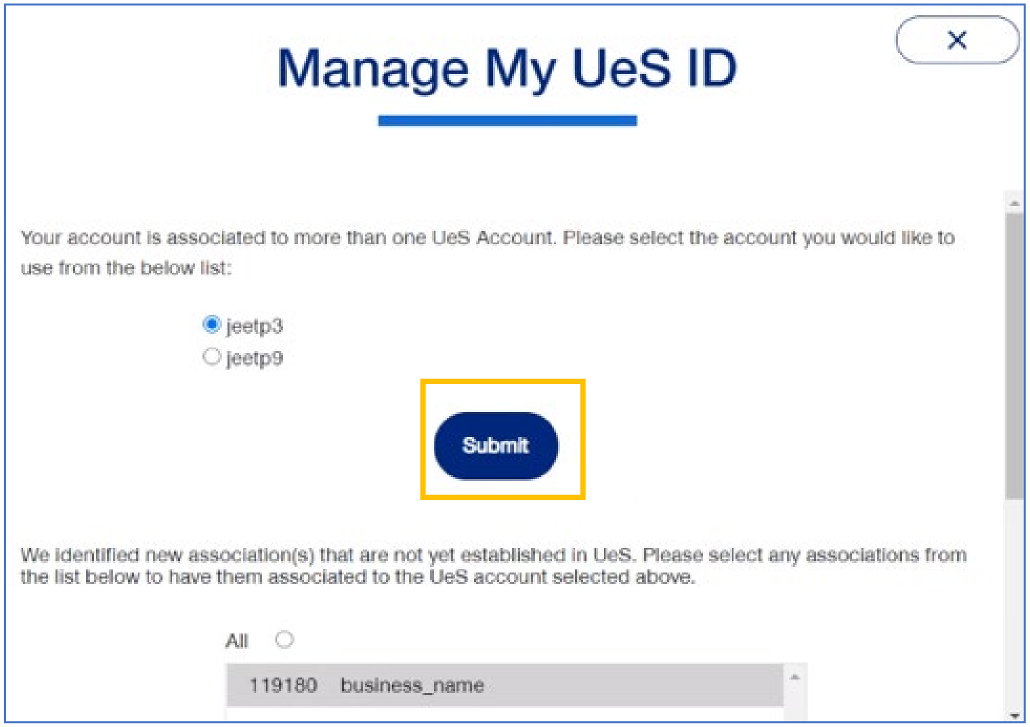
- **If you are not registered with United eServices**, click the **Continue** button in the **I Do Not Have a United eServices Account** box. You will then be directed to the home page. After your first access, you will go to the SAM automatically.
- **If you already have a UeS Username and Password,** enter information in the **I Have a United eServices Account** box. Click **Submit**.







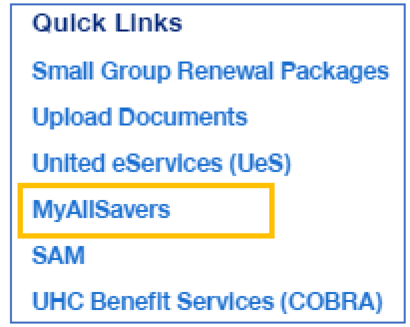
Note: Manage My UeS ID – If your UeS account is associated to more than one account, a pop-up screen displays asking you to select the account you want to use. Select the account you need or select All. Then click **Submit**.

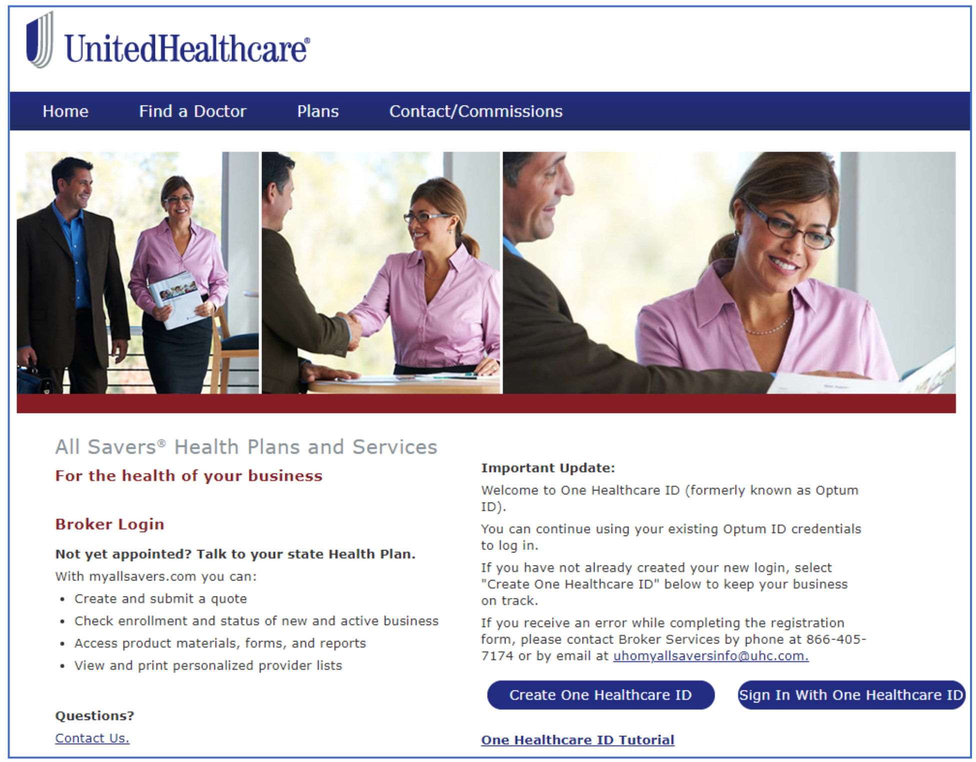


6 | Quick Links: MyAllSavers (Level Funded)

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

Note: First Time Access – When you click the **Level Funded** tab the first time, you will have to complete a registration form to link your One Healthcare ID with uhcesservices.com and myallsavers.com. Once you do this you will enjoy the benefits of single sign-on.





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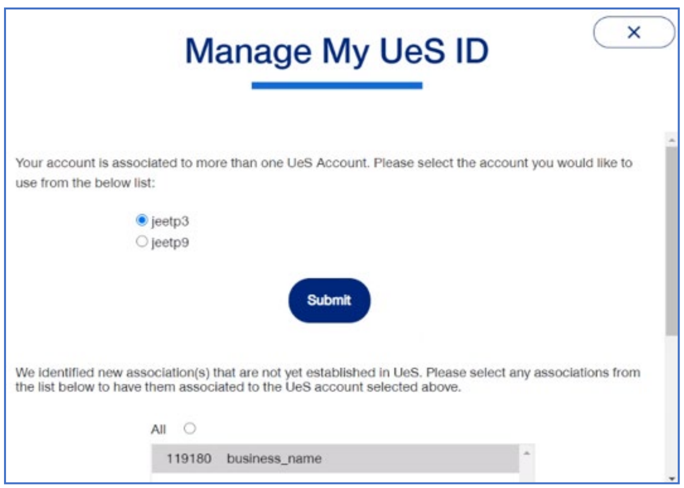
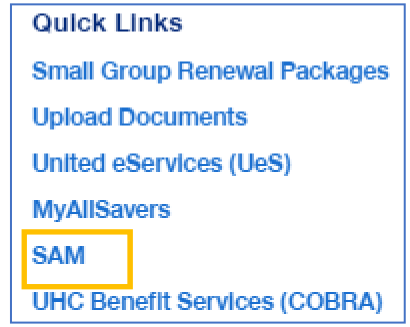
6 | Quick Links: SAM

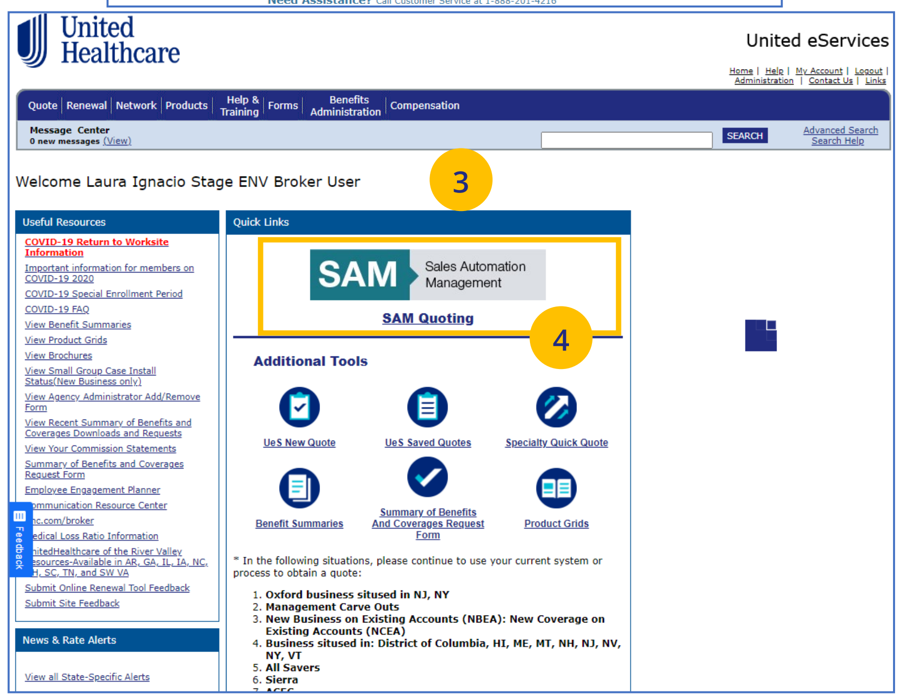
The **SAM** link allows you to sign on and access United eServices (UeS) to go into the SAM (Sales Automation Management) application.

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

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



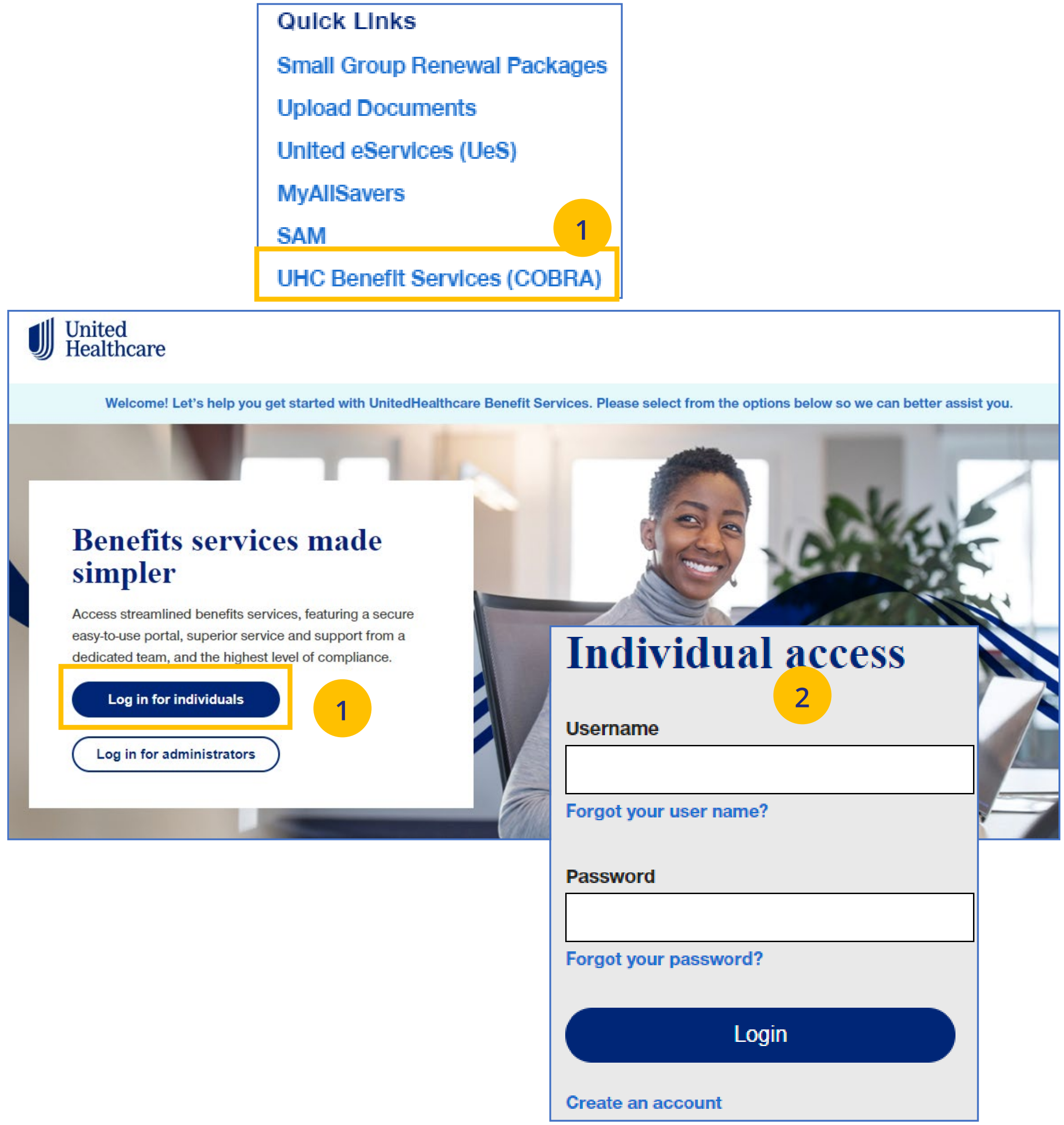




6 | Quick Links: UHC Benefit Services (COBRA)

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

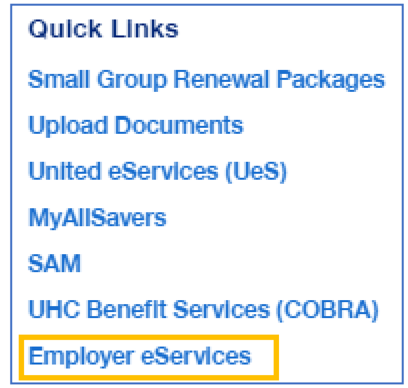
1. Under **Benefits services made simpler**, click **Log in for individuals**. The **Individual access** Login screen displays.
2. Enter your **Username** and **Password** and click **Login.** The **Billing Services Account Screen** displays.

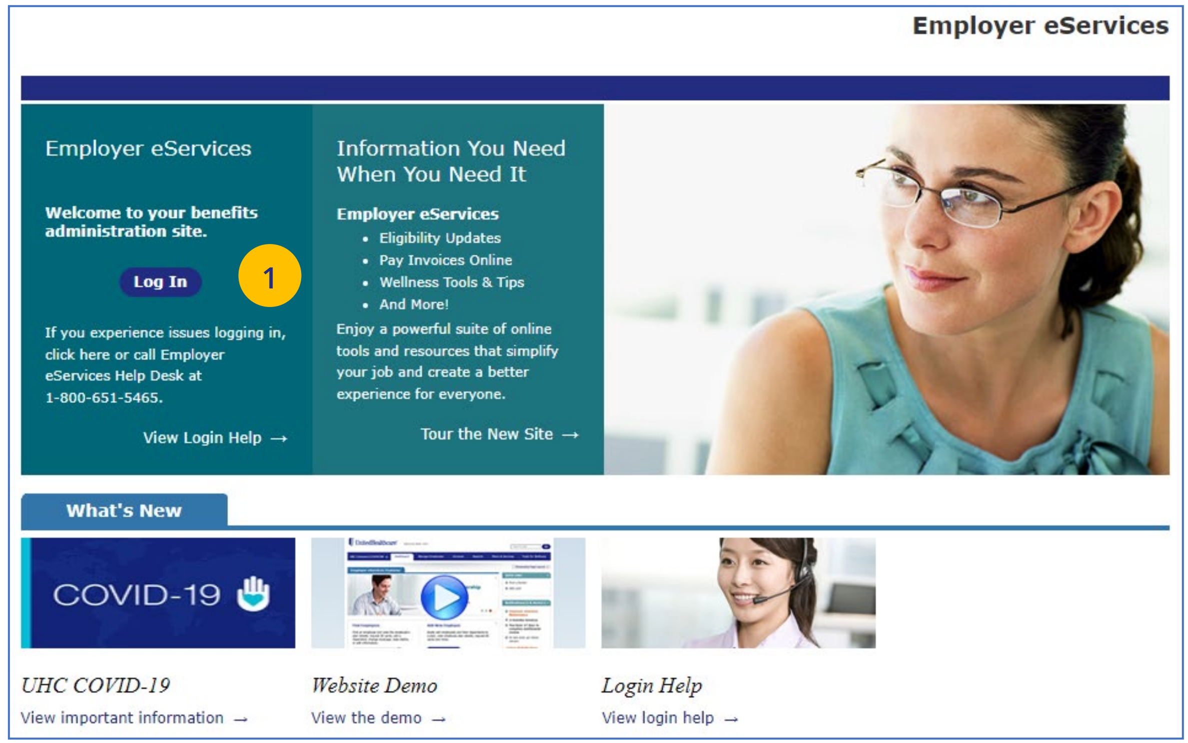


6 | Quick Links: Employer eServices

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

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





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

7 | Manage Members

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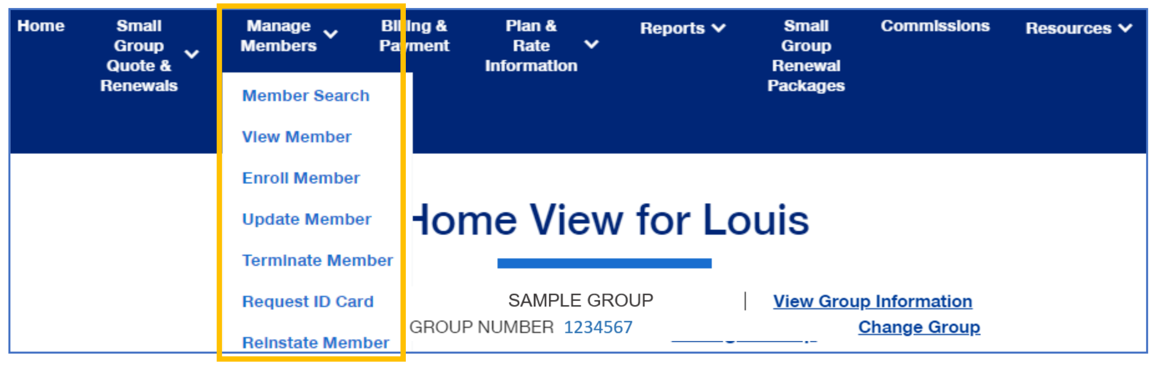
The **Member Services** tab gives you access to the following:

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



7 | Member Search / View Member

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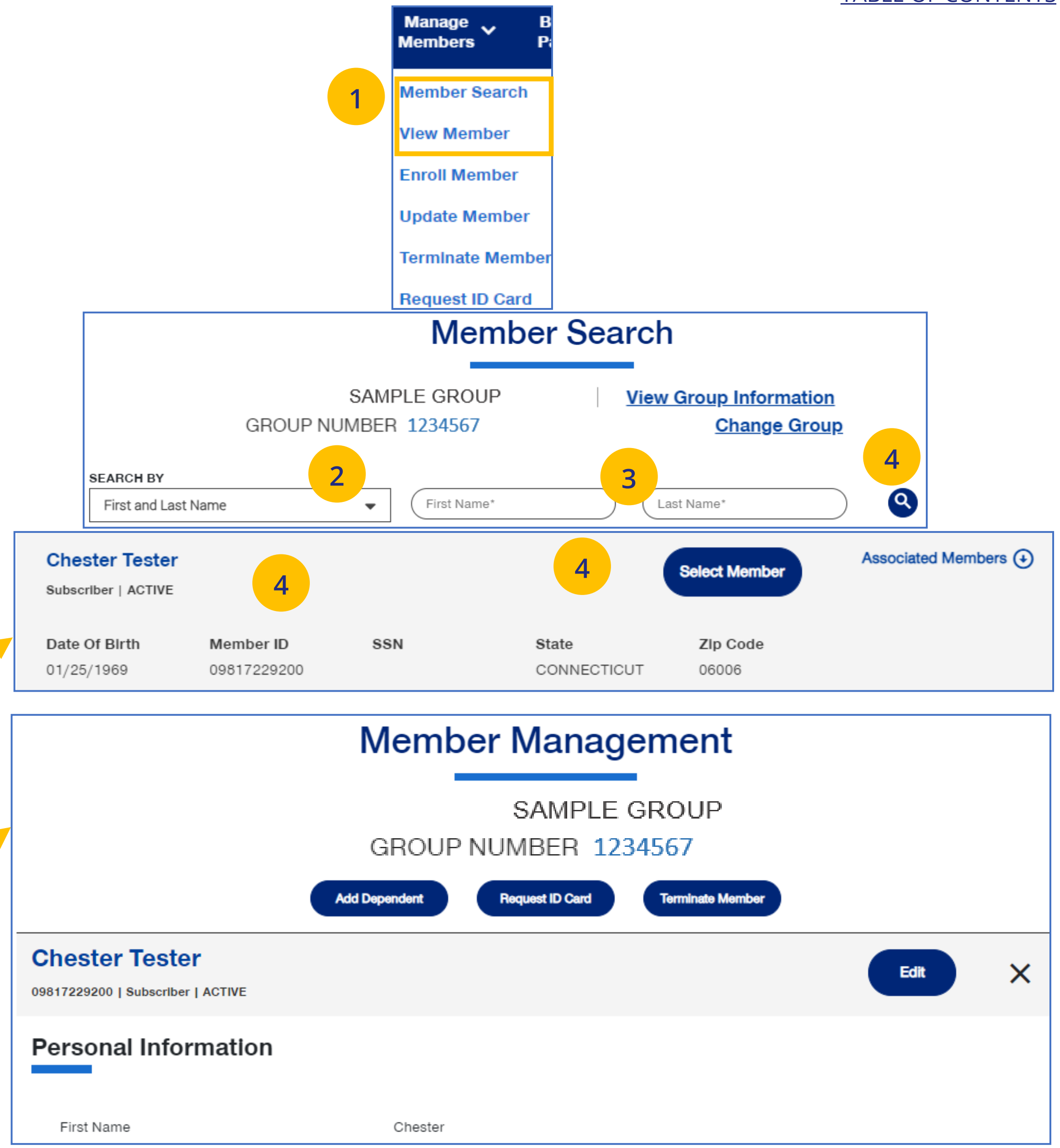
The **Member Search** and **View Member** tabs are used to search for a specific member record. **They both perform the same function.** You can search for a member using one of the following options:

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

To search for a member:

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

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

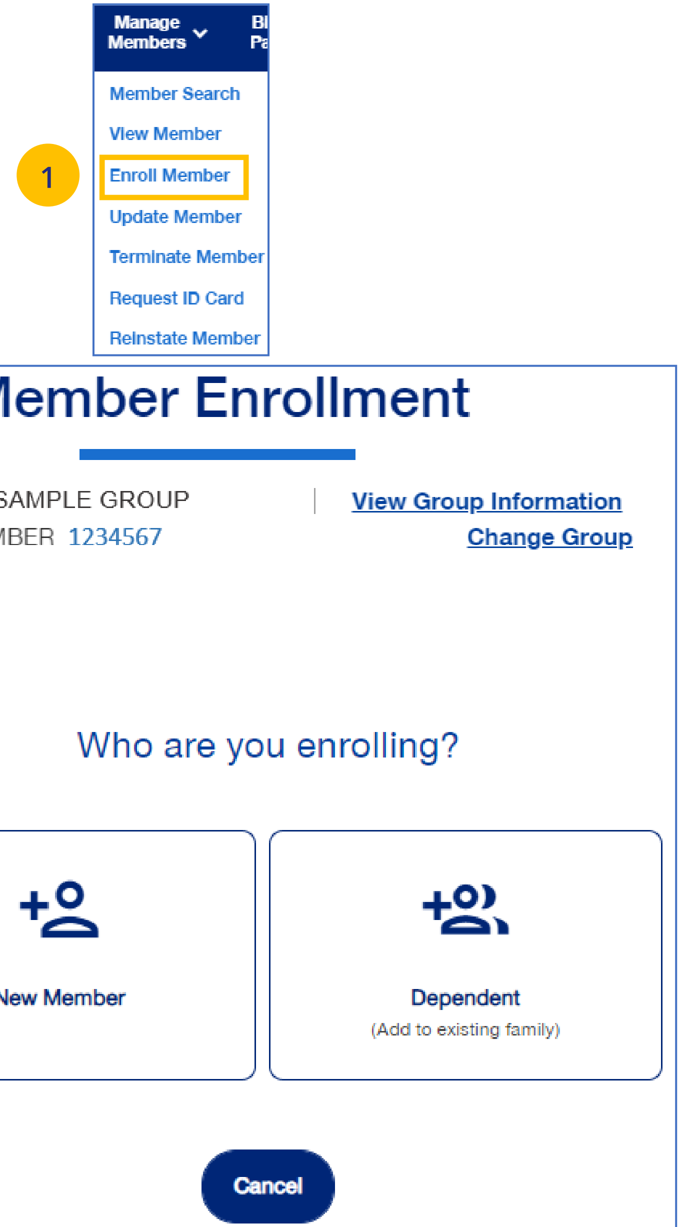


8 | Enroll Member

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.



8 | Enroll Member: Demographics

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

To enroll a new member:

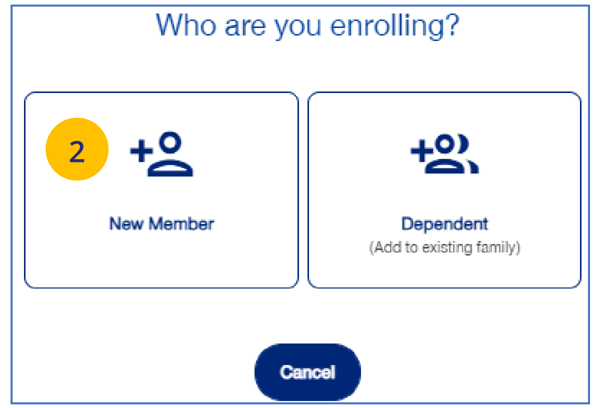
2. Click the **New Member** box. The **Member Enrollment** detail screen displays.

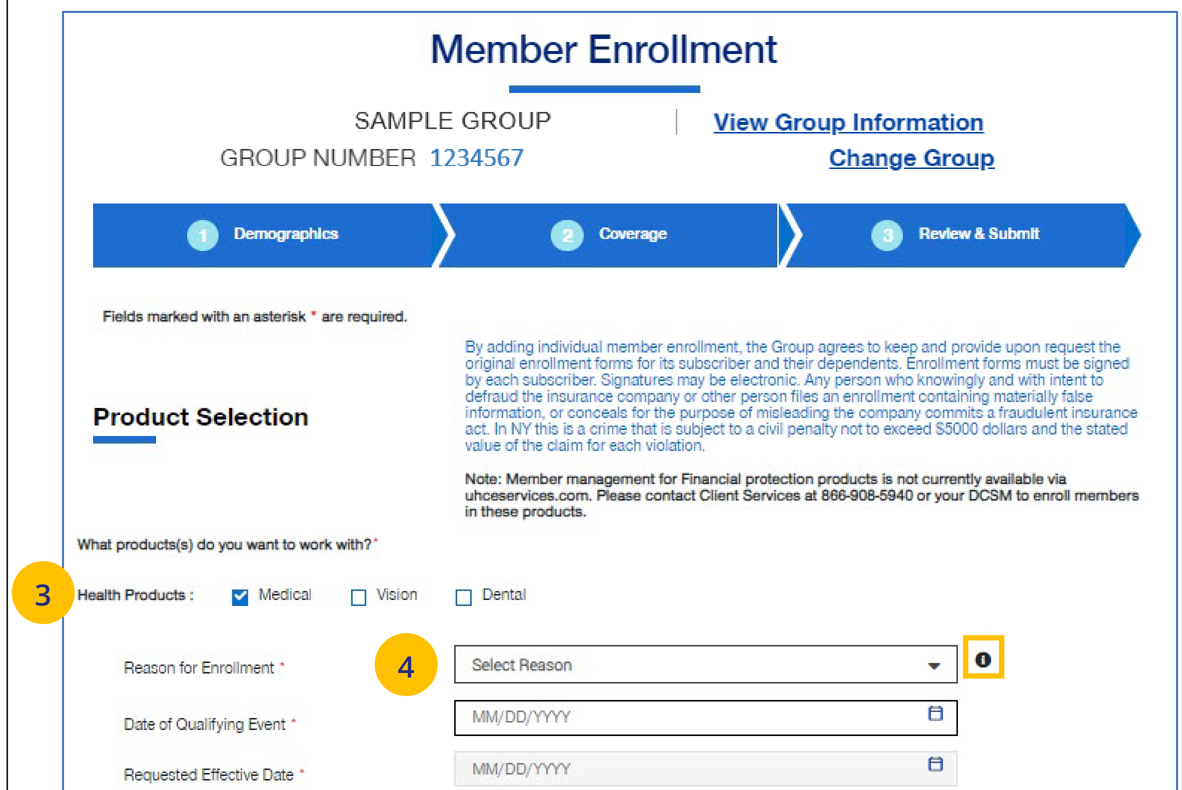
3. Select the appropriate **Health Products**.

4. Enter the **Reason for Enrollment**.

   Note: COBRA Enrollment – If you are enrolling a member into **COBRA**, select **Continuation. IMPORTANT:** An active member must be **terminated** from their current enrollment before being enrolled in COBRA. The member's COBRA coverage will automatically be terminated at the end of their coverage period unless the member terminates coverage earlier.

   Note: An information icon ℹ 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.**





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

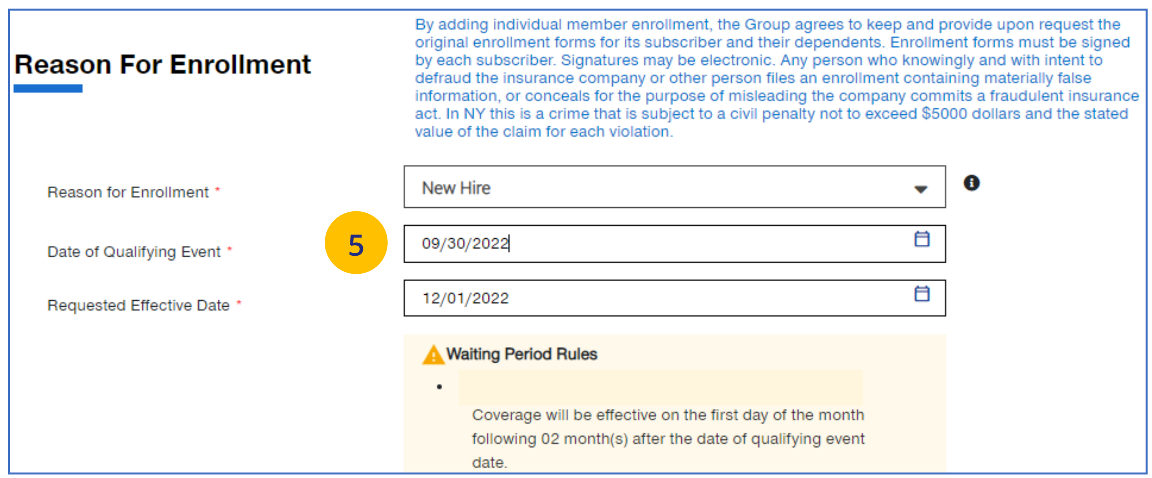
   Common examples of qualifying events include the birth or adoption of a child, death of a spouse, or a change in marital status.

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

   For new hire – enter the date of hire.

   For open enrollment – enter the renewal effective date.

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



8 | Enroll Member: Demographics (continued)

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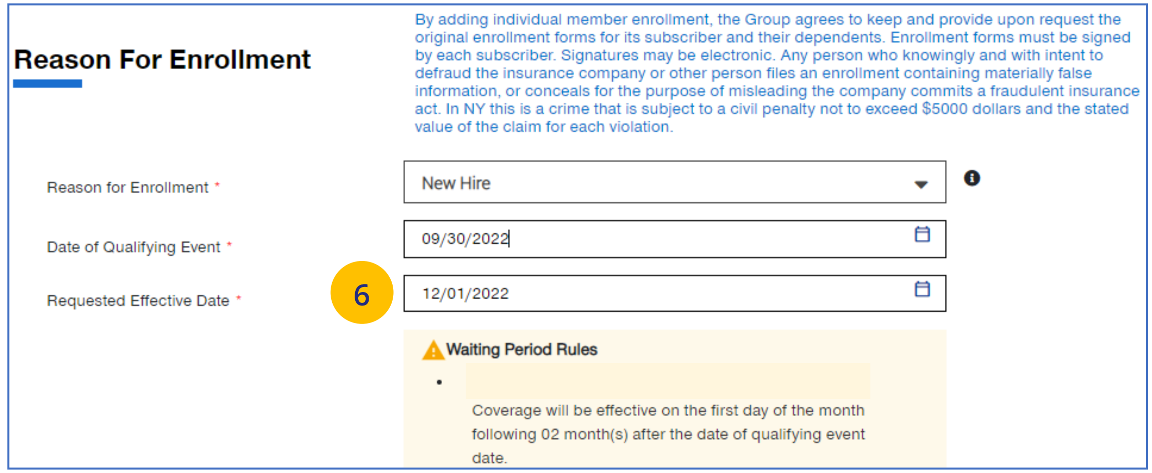
After enrollment is submitted, the system will display the **Actual Effective Date** you entered.

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

6. If you need to override the date shown, enter the effective date in the **Requested Effective Date** field. Follow your state guidelines applicable to effective dates.
   Note: If no plans are available for the **Qualifying Event** and **Requested Effective Date**, the message "There are no plans available at this time" displays.



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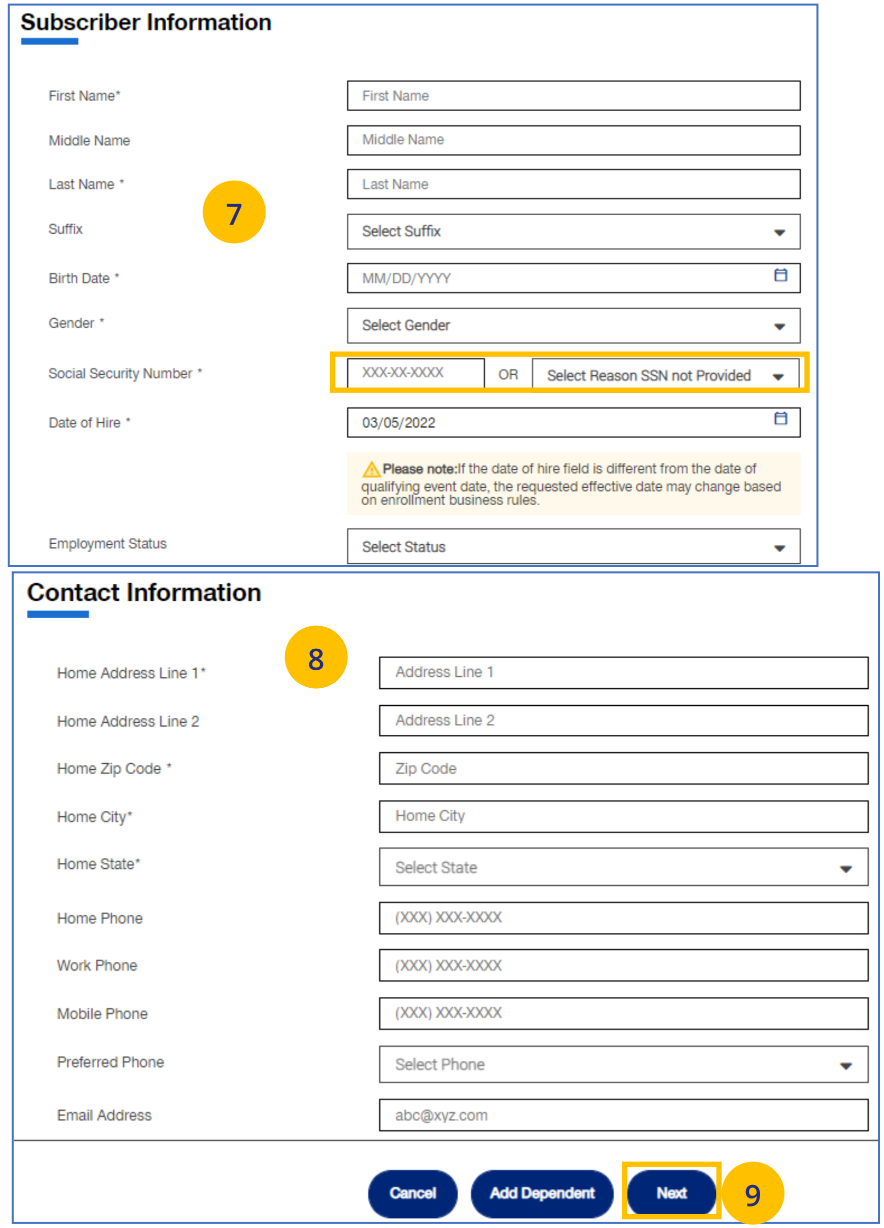
7. Enter information in the **Subscriber information** fields. **Note: Social Security Number -** For **UnitedHealthcare HMO** users, the **Select Reason SSN Not Provided** dropdown will not be available.

   Note: Custom Attributes – If a Group has requested it, custom attribute fields will be displayed. If displayed, entry in these fields is required.

8. Enter the enrollee's contact information in the **Contact Information** fields.

9. Click **Add Dependent** or **Next.**

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



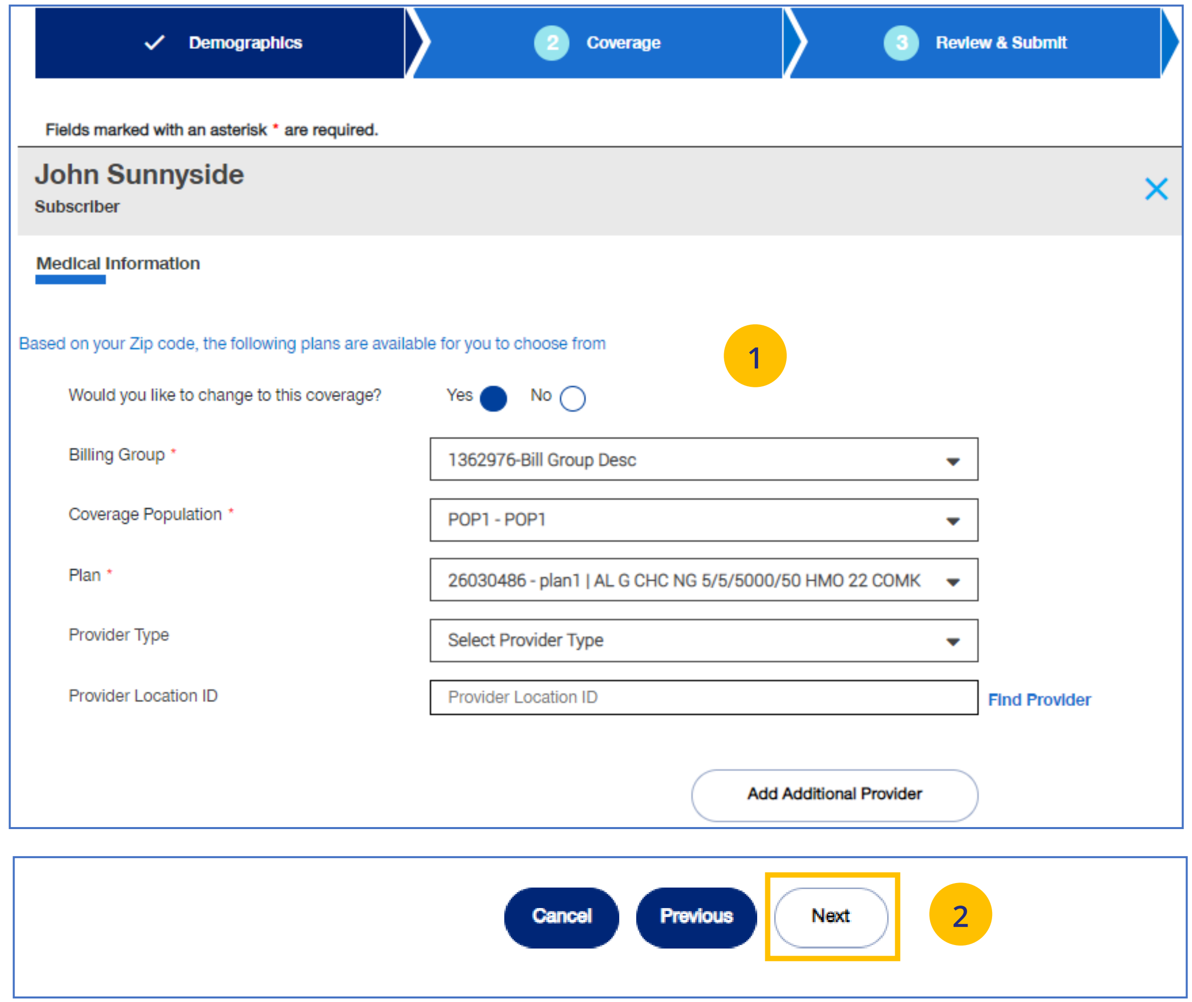
8 | Enroll Member: Coverage - Medical

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

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

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

2. Click **Next.**



8 | Enroll Member: Coverage - Medical (continued)

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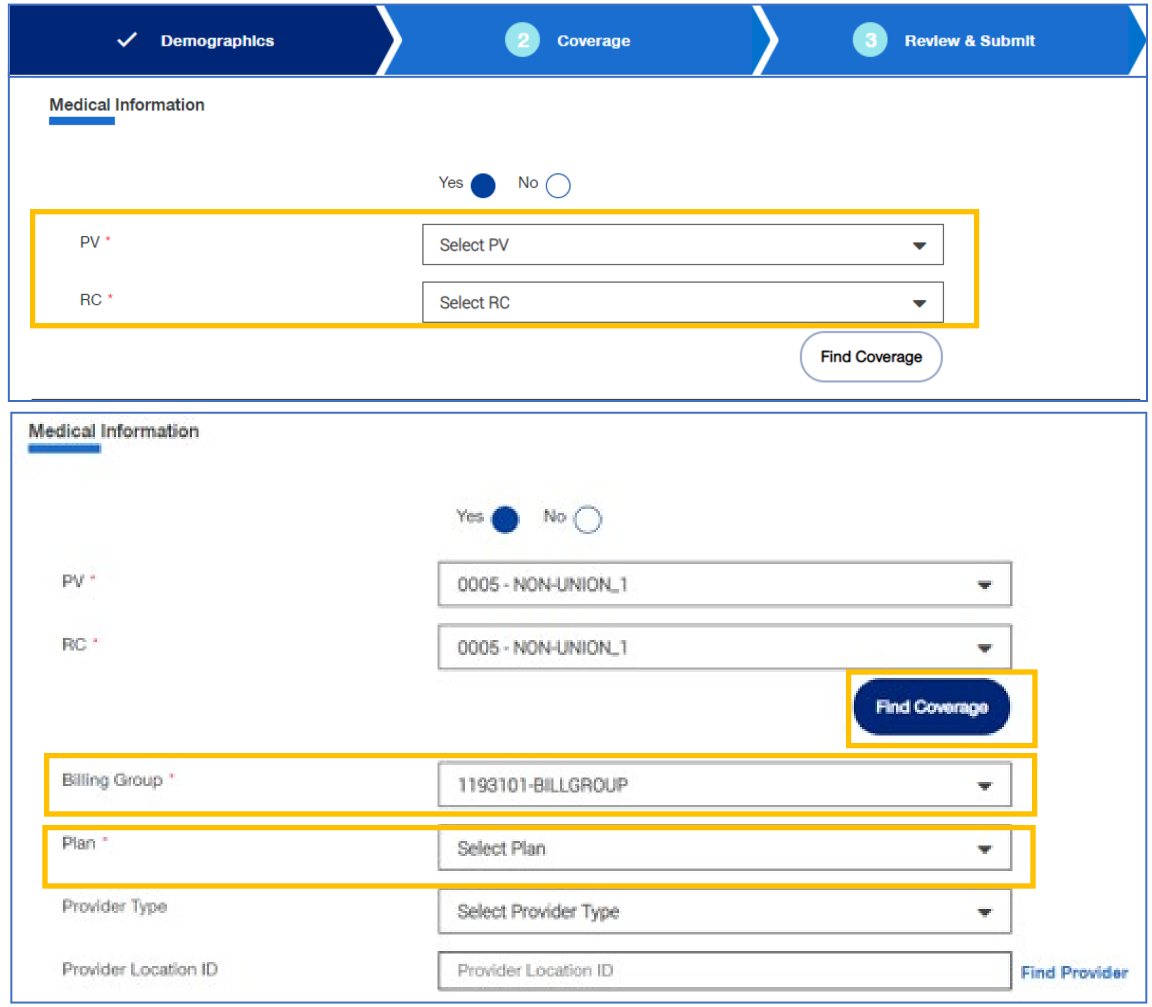
Note: Some groups may be set-up with **PV (Plan Variation)** and **RC (Reporting Code)** structure.

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

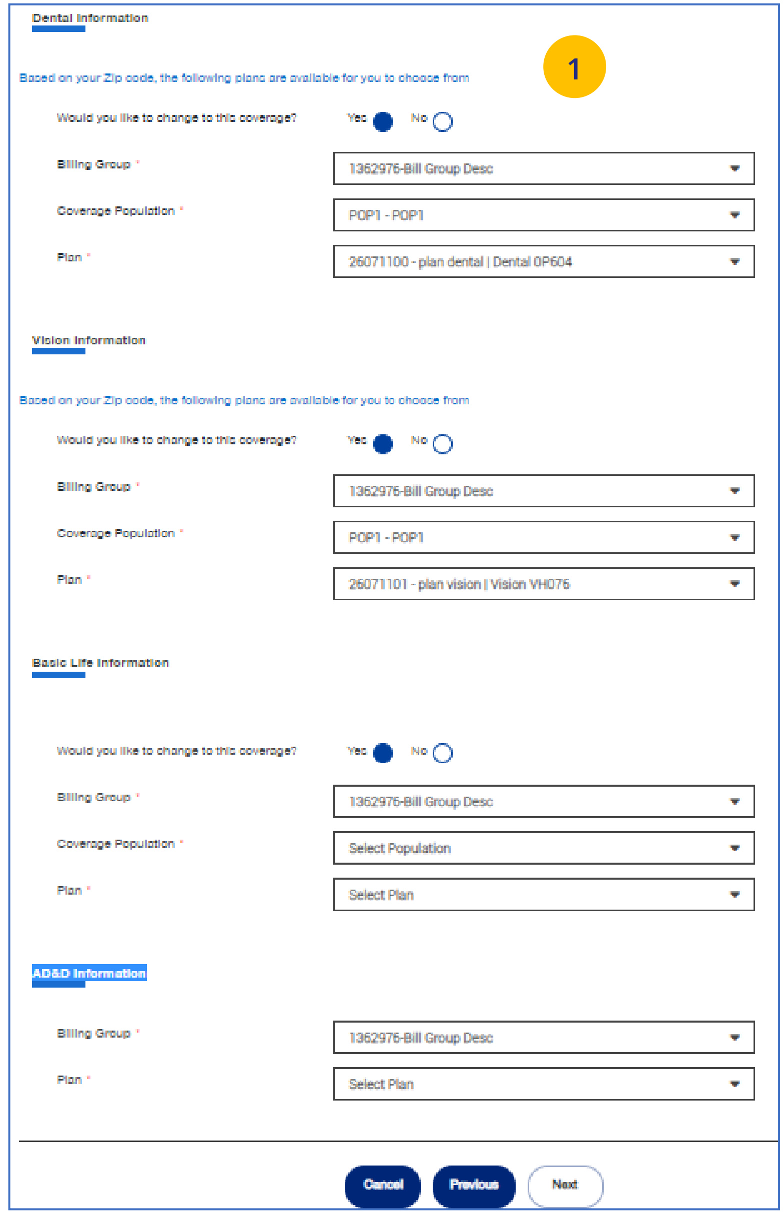
Entry in these fields is optional based on the group setup.



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

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

2. Click **Next.**



8 | Enroll Member: Review & Submit

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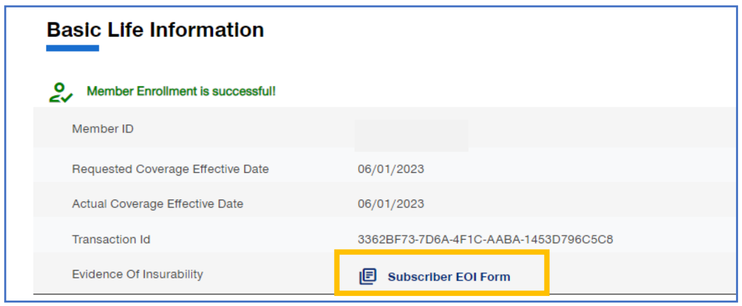
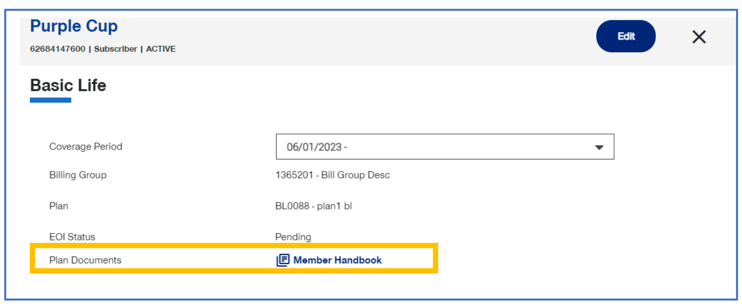
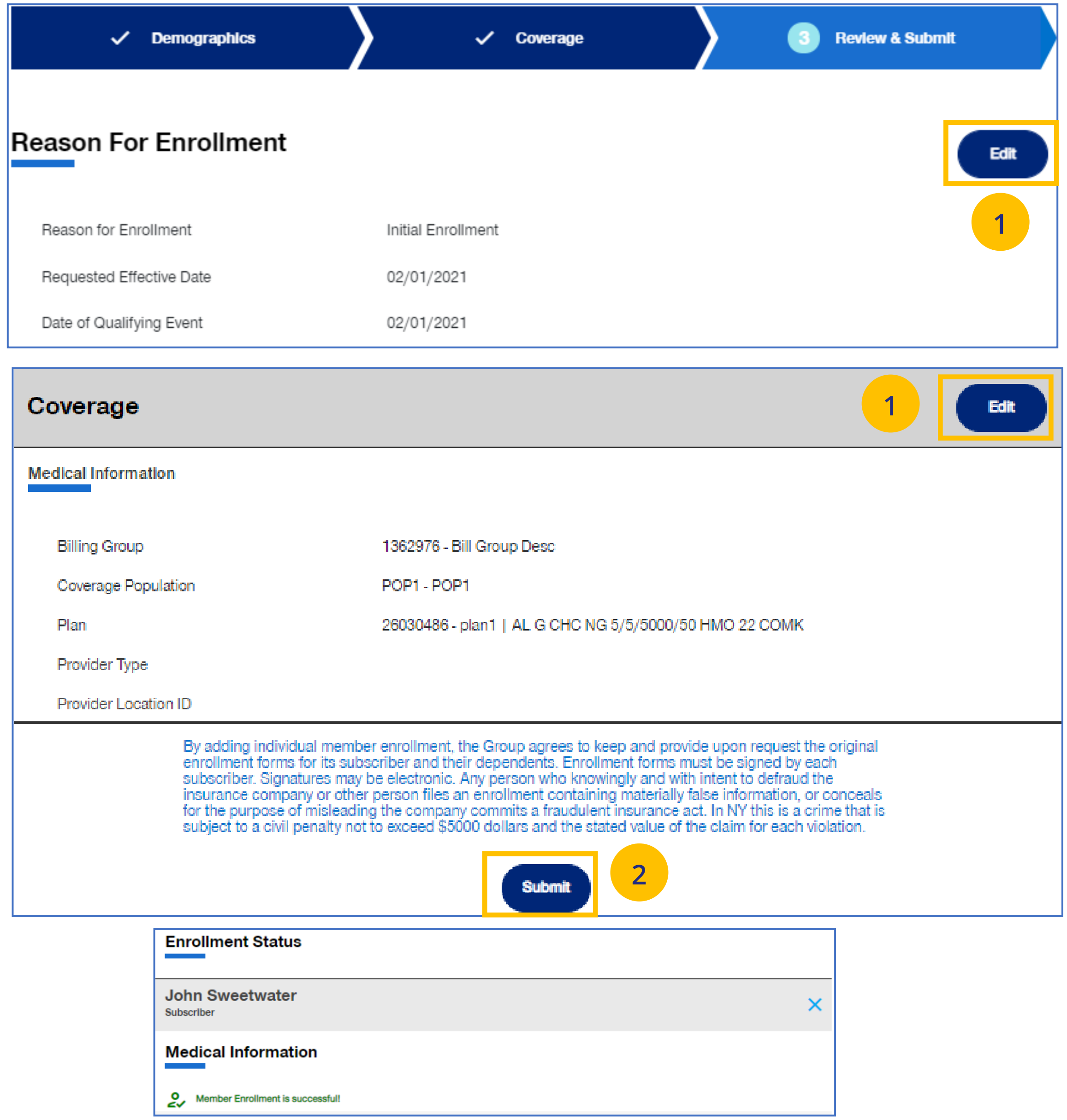
1. Review the information. If edits are needed on any of the information shown, click **Edit**.
2. If all the information is correct, scroll down and click **Submit**. A confirmation message displays telling you that **"Member Enrollment is successful**." You will see the Member ID number and a link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

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



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





7 | Update Member

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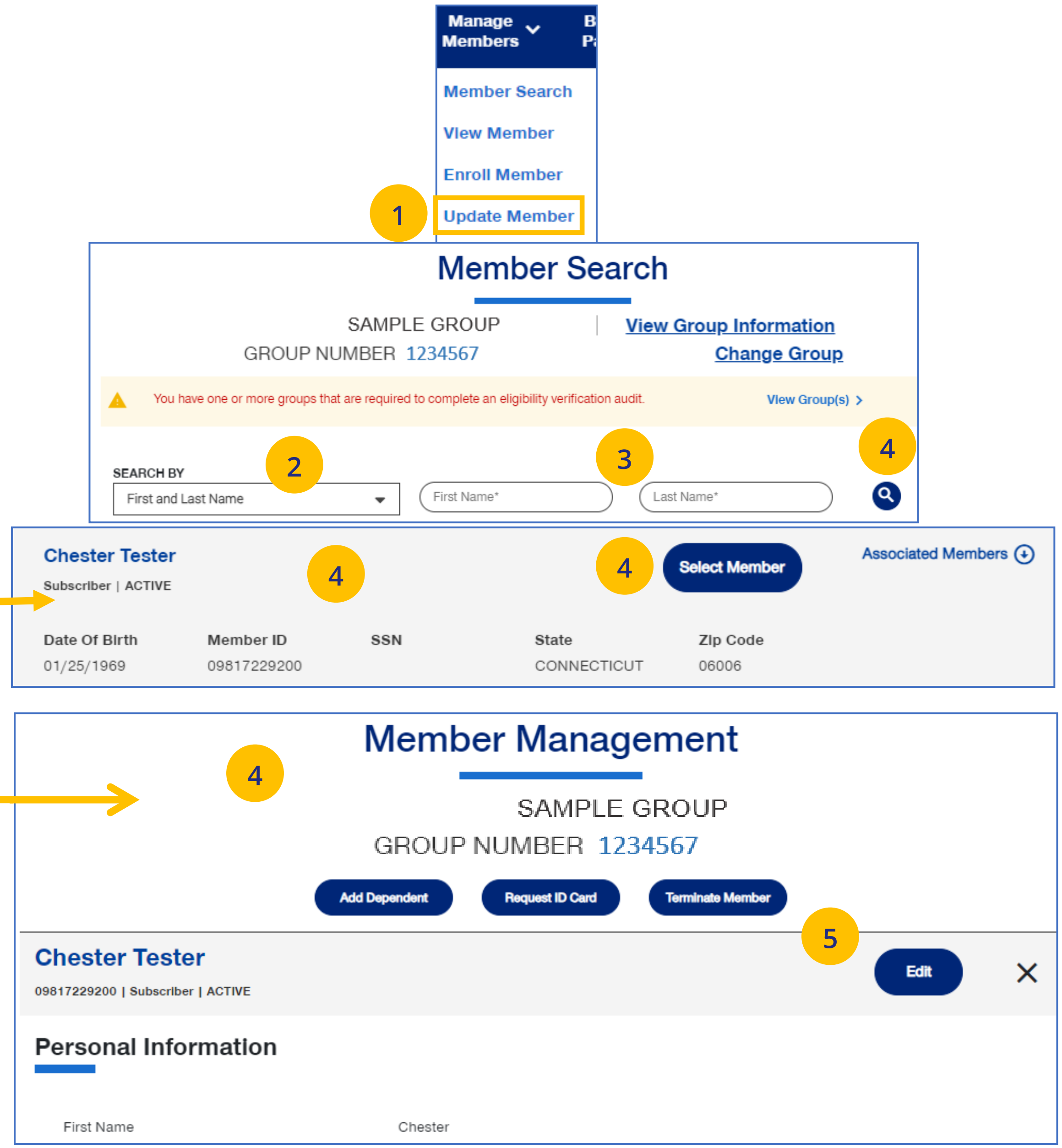
Update Member is used to search for and edit a specific member record. You can search for a member using one of the following options:

- 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.



7 | Update Member (continued)

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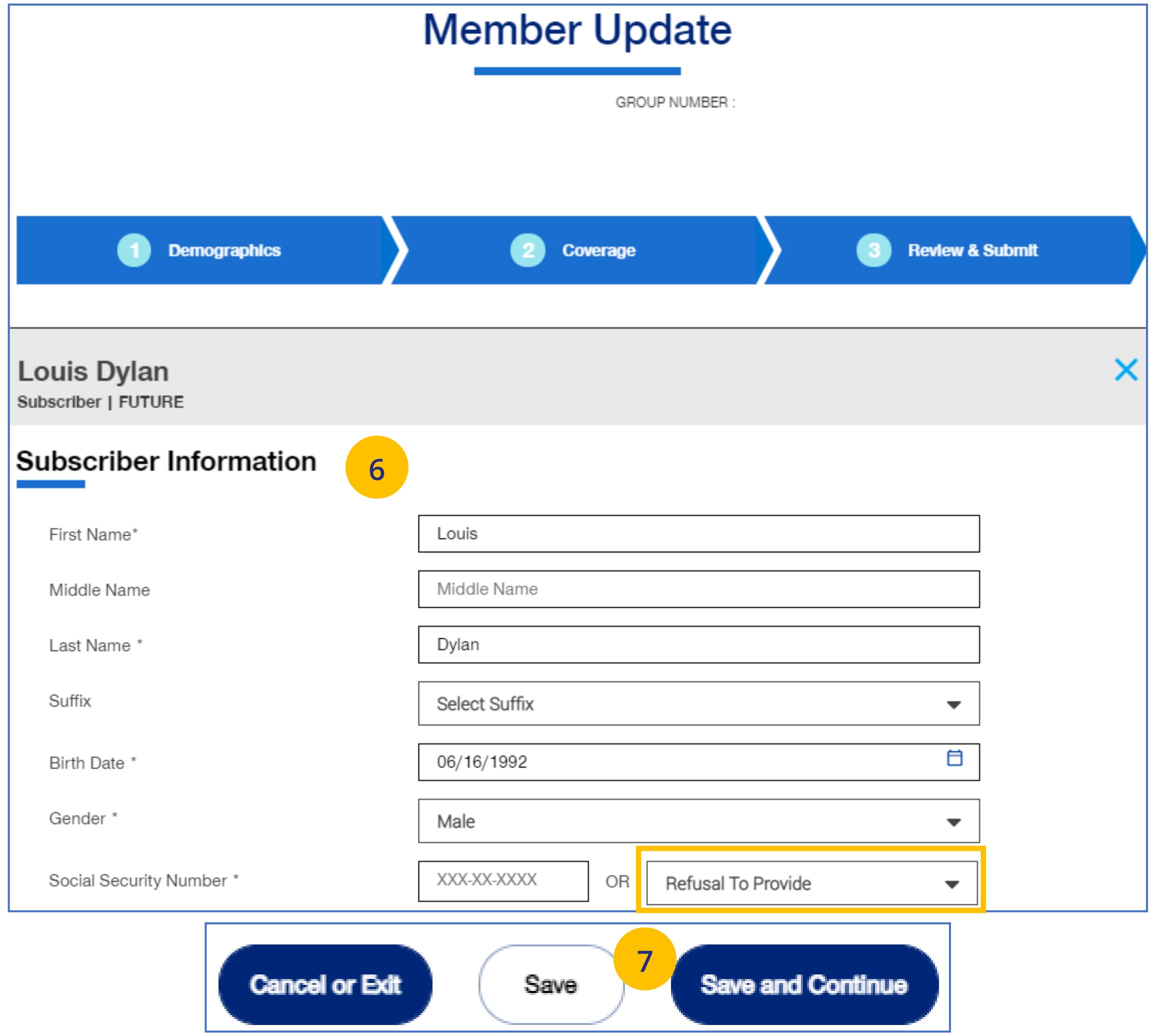
6. Update the needed information in the **Demographics** section if needed. You will have to scroll to see all fields.

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

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

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



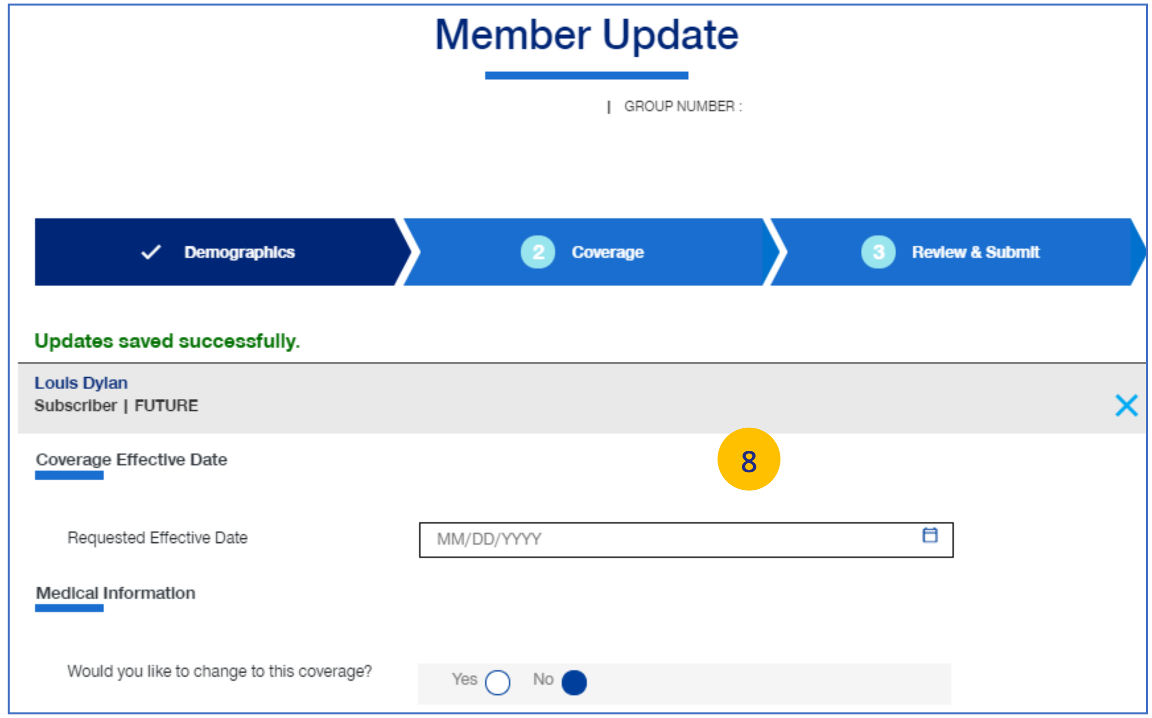
8. Update the needed information in the **Coverage** section if needed. You will have to scroll to see all fields.

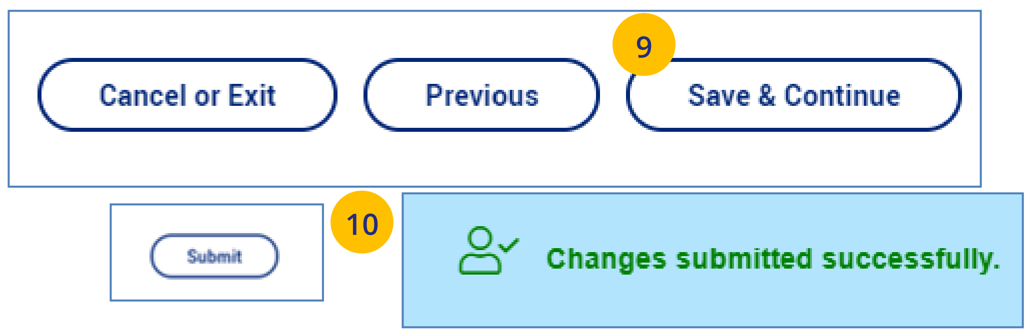
   Note: Billing Group – In the Billing Group area, you can narrow your search for a billing group by typing in the first few letters or number in the billing group.

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

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

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





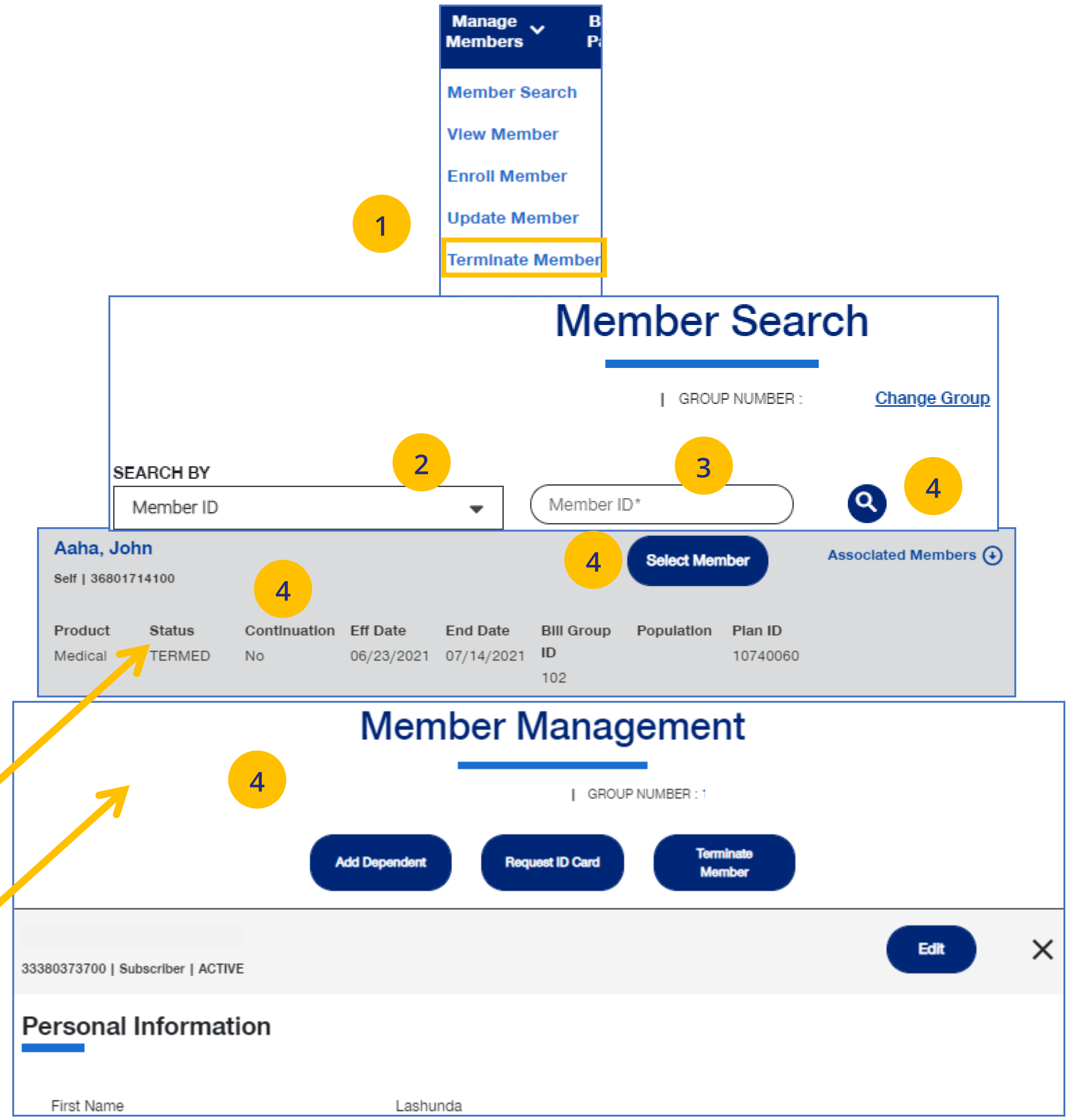
7 | Terminate a Member's Coverage

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

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

To search for and terminate a member:

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



7 | Terminate a Member’s Coverage (continued)

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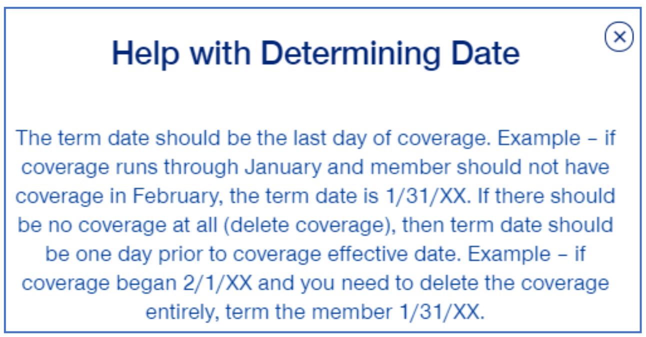
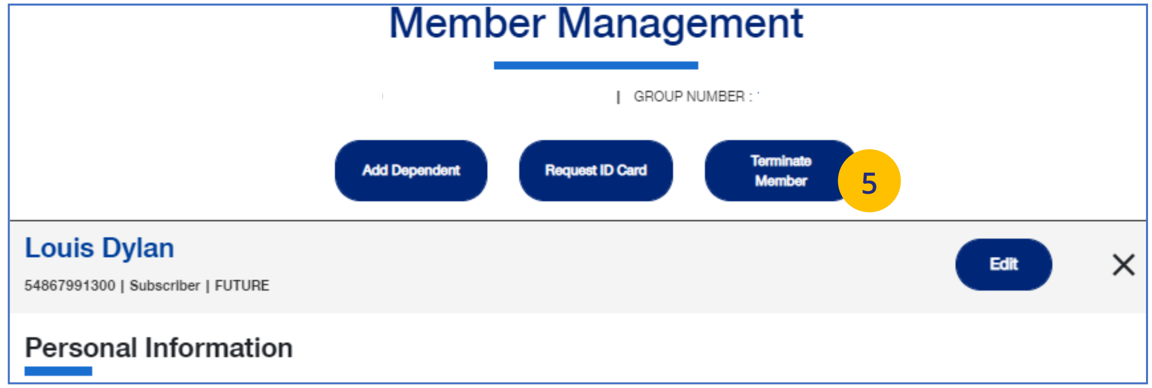
5. Click **Terminate Member**. The **Terminate Member Benefits** screen displays.
6. In the **Termination Reason** section, use the **Select Reason** dropdown to enter the reason for the termination.

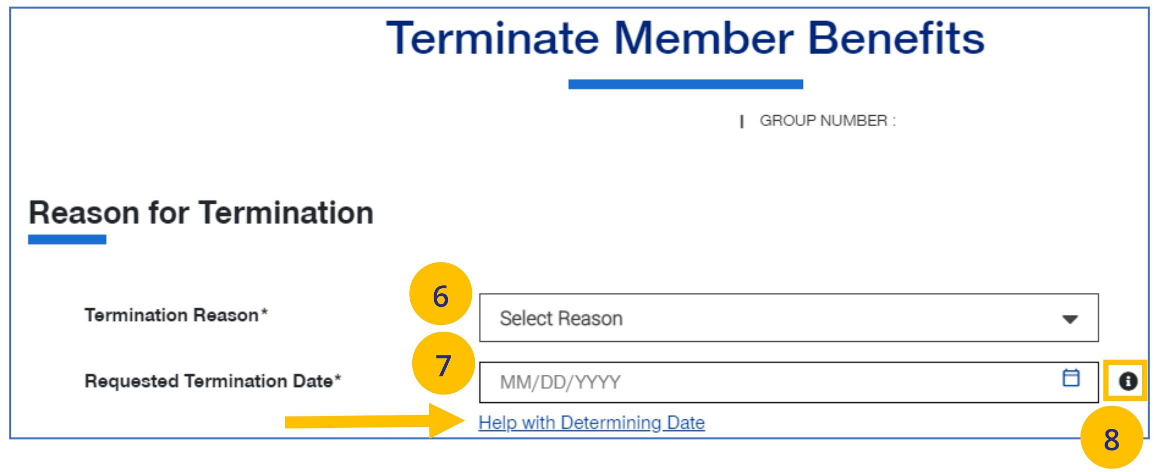
   Note: COBRA Termination – For COBRA Terminations, select **Discontinue COBRA** for the **Termination Reason**.
7. Enter the requested termination date in the **Requested Termination Date** field.

   Note: Help with Determining Date – When you click the **Help with Determining Date** link, the following pop-up box displays:



8. Click the information icon after **Requested Effective Date**. A **Waiting Period Rules** box indicates rules that apply for termination dates based on the group contract. Click the **X** in the upper-right corner to return to the **Terminate Member Benefits** screen.



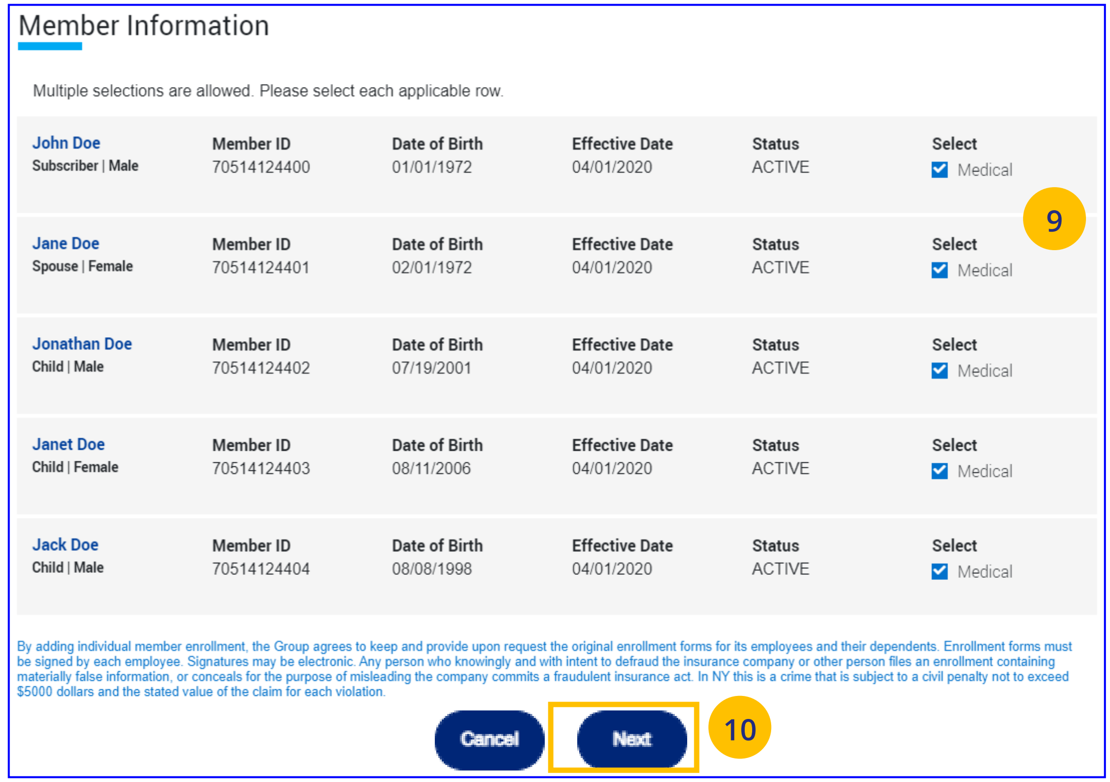


7 | Terminate a Member's Coverage (continued)

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

10. Click **Next**. The **Terminate Member Benefits** screen displays, asking you to confirm that the information is correct.

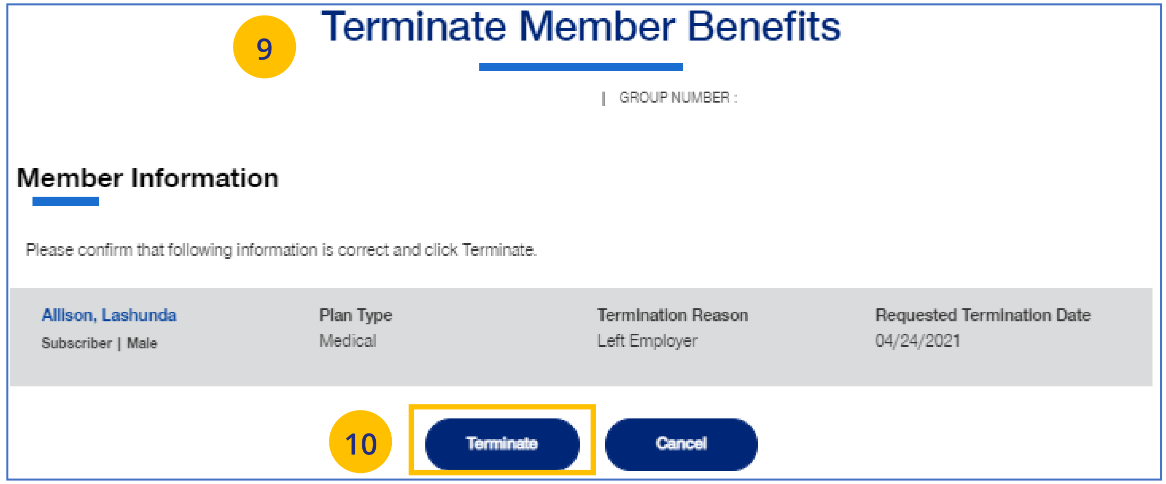
    Note: If you terminate the coverage for the subscriber, the system will also select all dependents for termination.

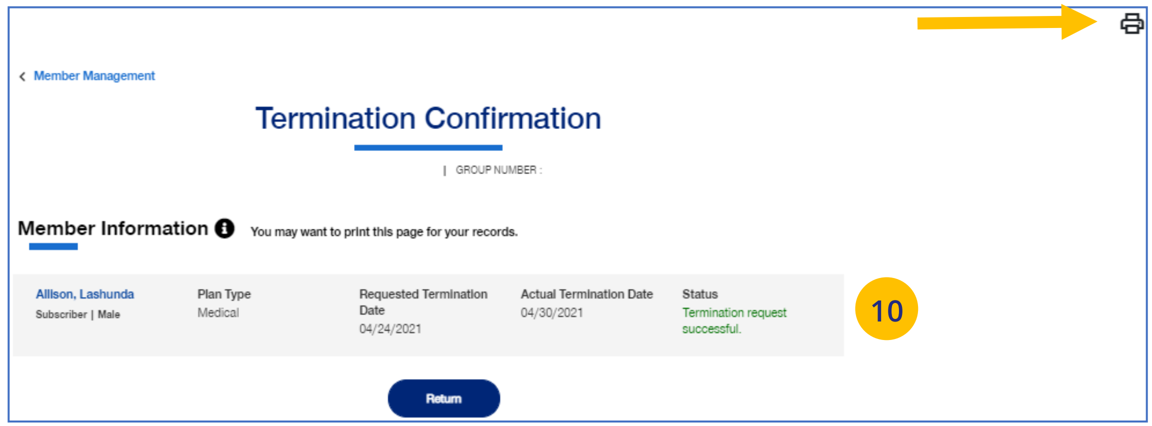


11. Click **Terminate**. A message displays telling you the member has been terminated successfully.

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

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





7 | Request a Health Plan ID Card

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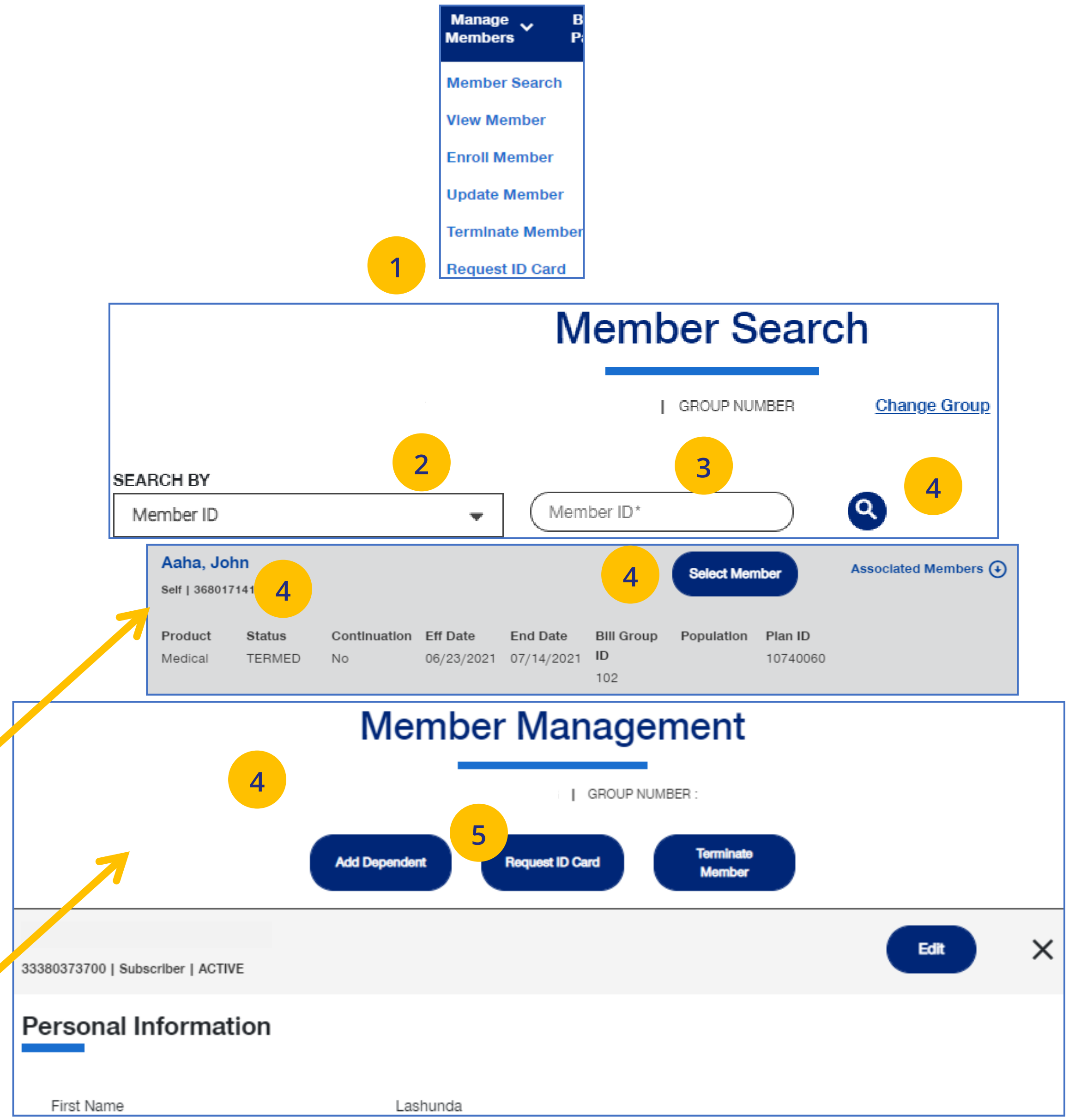
The **Request ID Card** tab is used to search for a member and then (1) request an ID card be mailed to that member, or (2) print an ID card. You can search for a member using one of the following options:

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

To Request an ID Card:

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

   Note: If you search by Member Name, the next screen will show the **Request ID Card** button.
4. Click the **Search** icon.
   - **If you search using any of the Name options**, the search results will be shown. Click **Select Member**. The **Member Management** screen displays with detailed information on the member.
   - **If you search using Member ID**, the **Member Management** screen displays with detailed information on the member.
5. Click **Request ID Card**.



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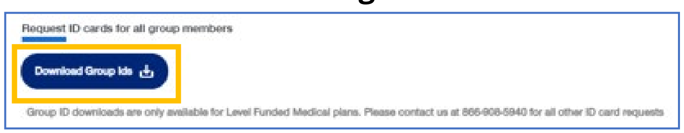
6. Select the member and (1) click **Print ID Card** to print the card or save it as a pdf, **or** (2) click **Order ID Card** to order the card. For **Dental** cards, only **Print ID Card** is available. The message “Request sent successfully” displays. Repeat this for other members or dependents if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

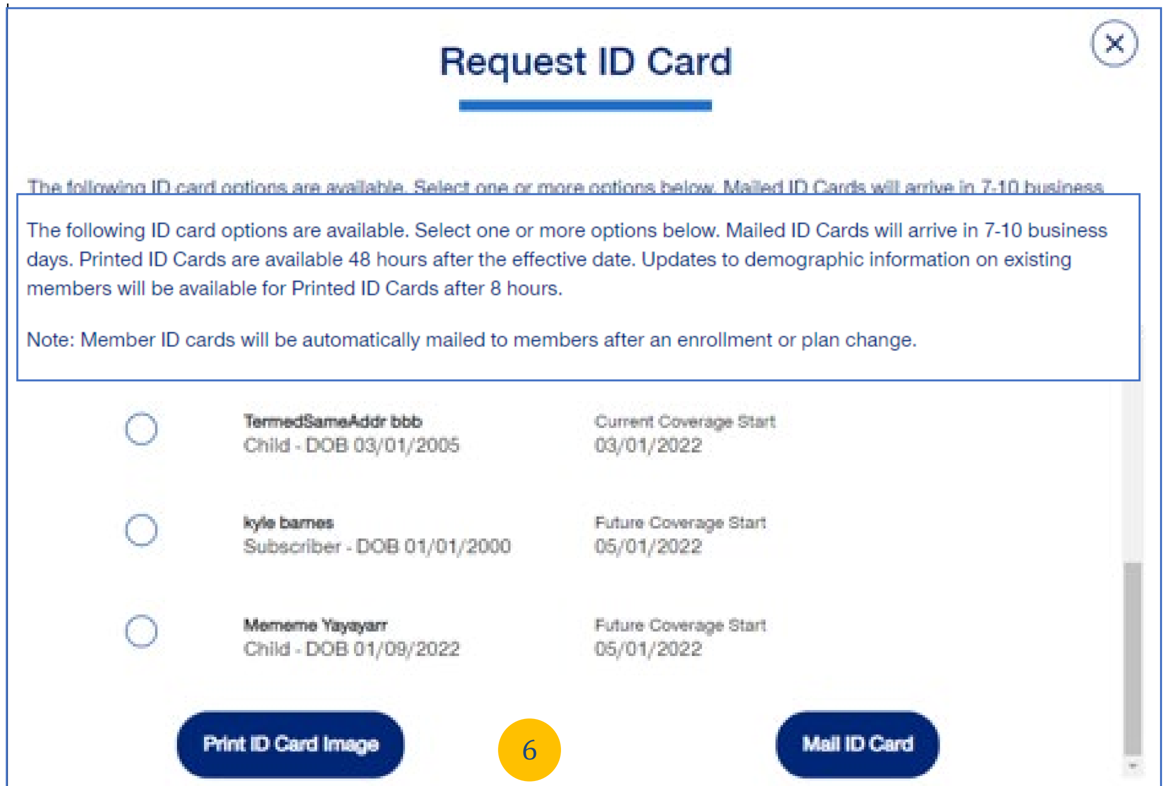
Note: If any dependent is classified as “infant,” their status must be changed to “Child” before a Health Plan ID card can be ordered or printed.

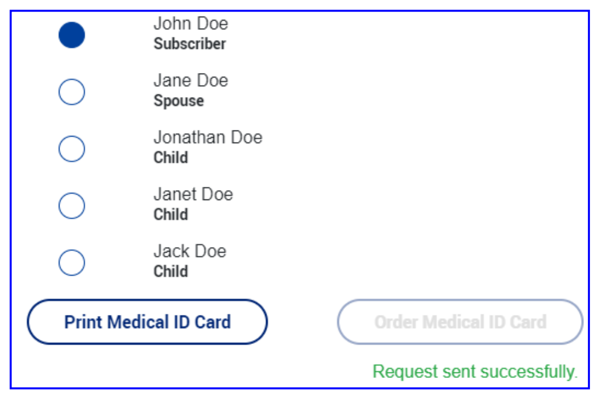
Note: If there is a member change, it will take 24 to 48 hours for a new ID card to be available.

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.





6

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

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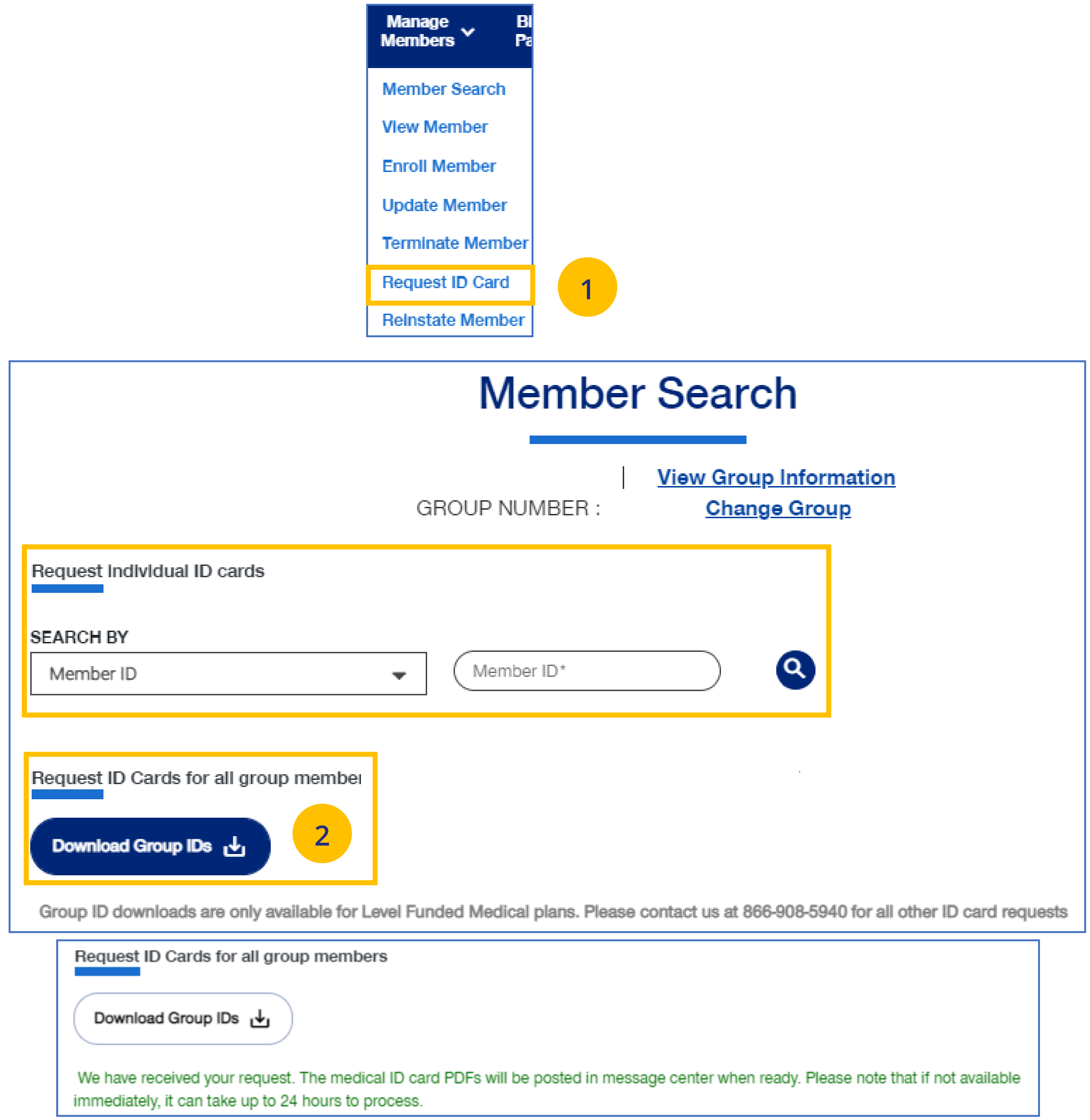
For Level Funded groups, you have the option to request health plan ID cards for all members in a group. This applies to Level Funded Medical plans only.

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

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



7 | Reinstate Member

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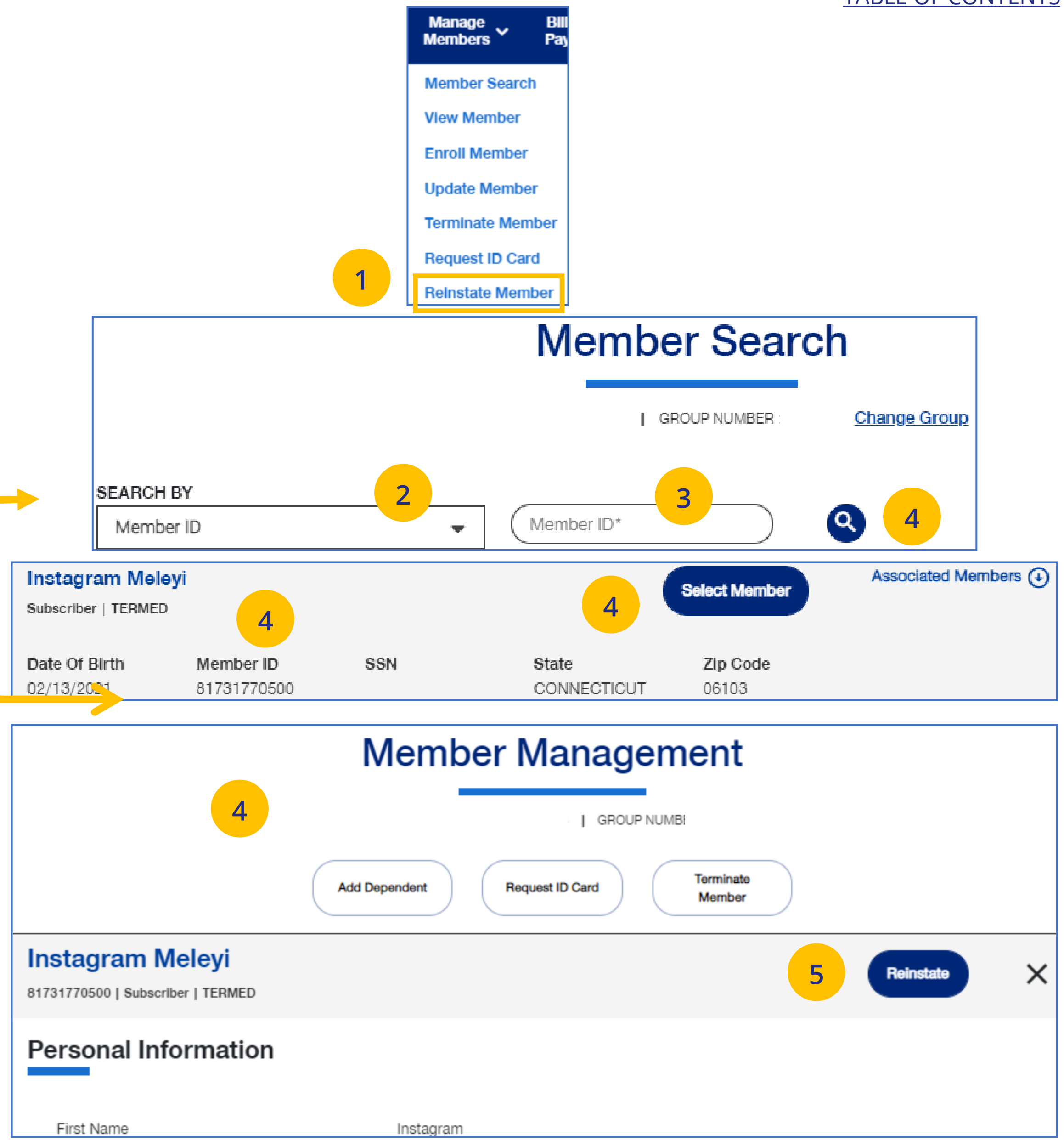
Reinstate Member is used to reinstate a member, and dependents if needed, who were previously terminated. The reason can be for COBRA and non-COBRA reasons.

To search for and reinstate a termed member:

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

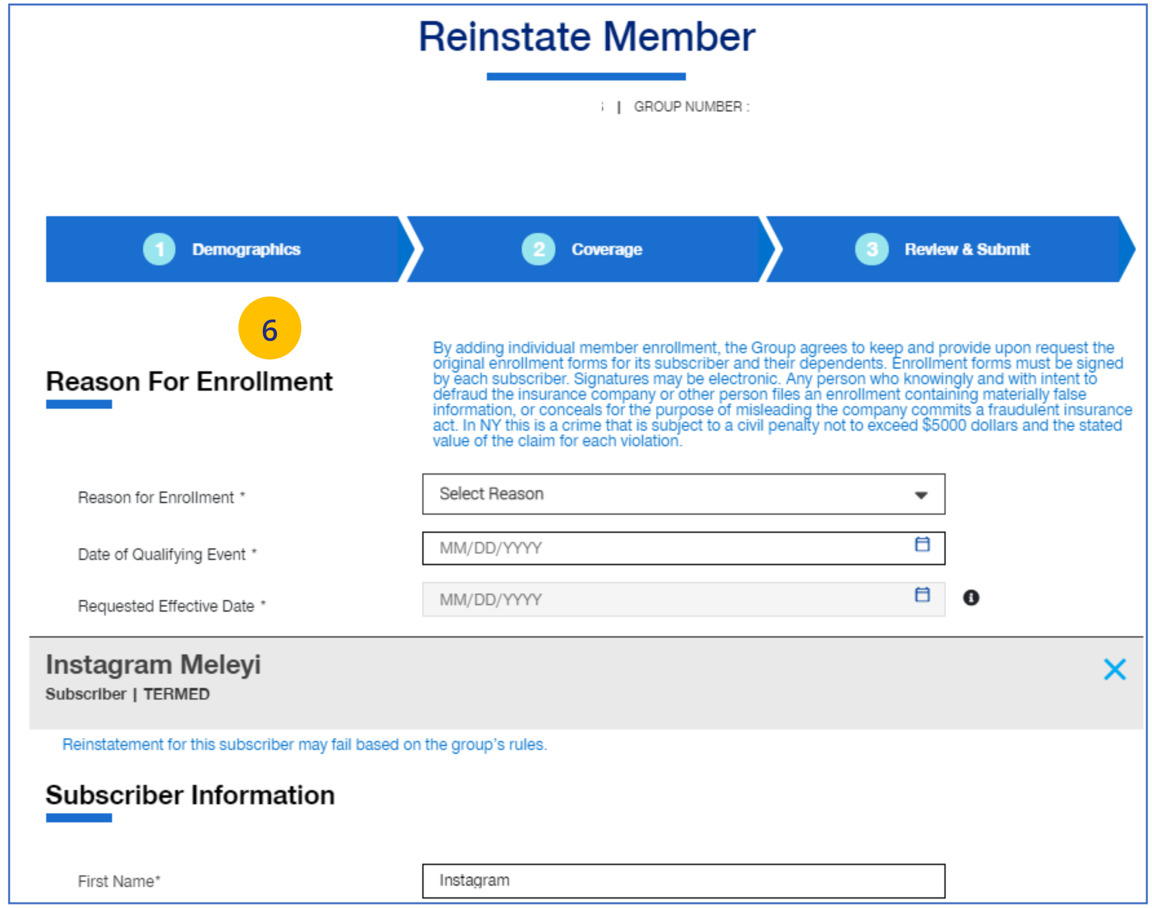


6. Update the needed information in the **Demographics** sections: **Reason for Enrollment**, Date of Qualifying Event. **Contact Information** is an optional section that can be edited at this time for the member being reinstated. You will have to scroll down to see all fields.

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

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

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

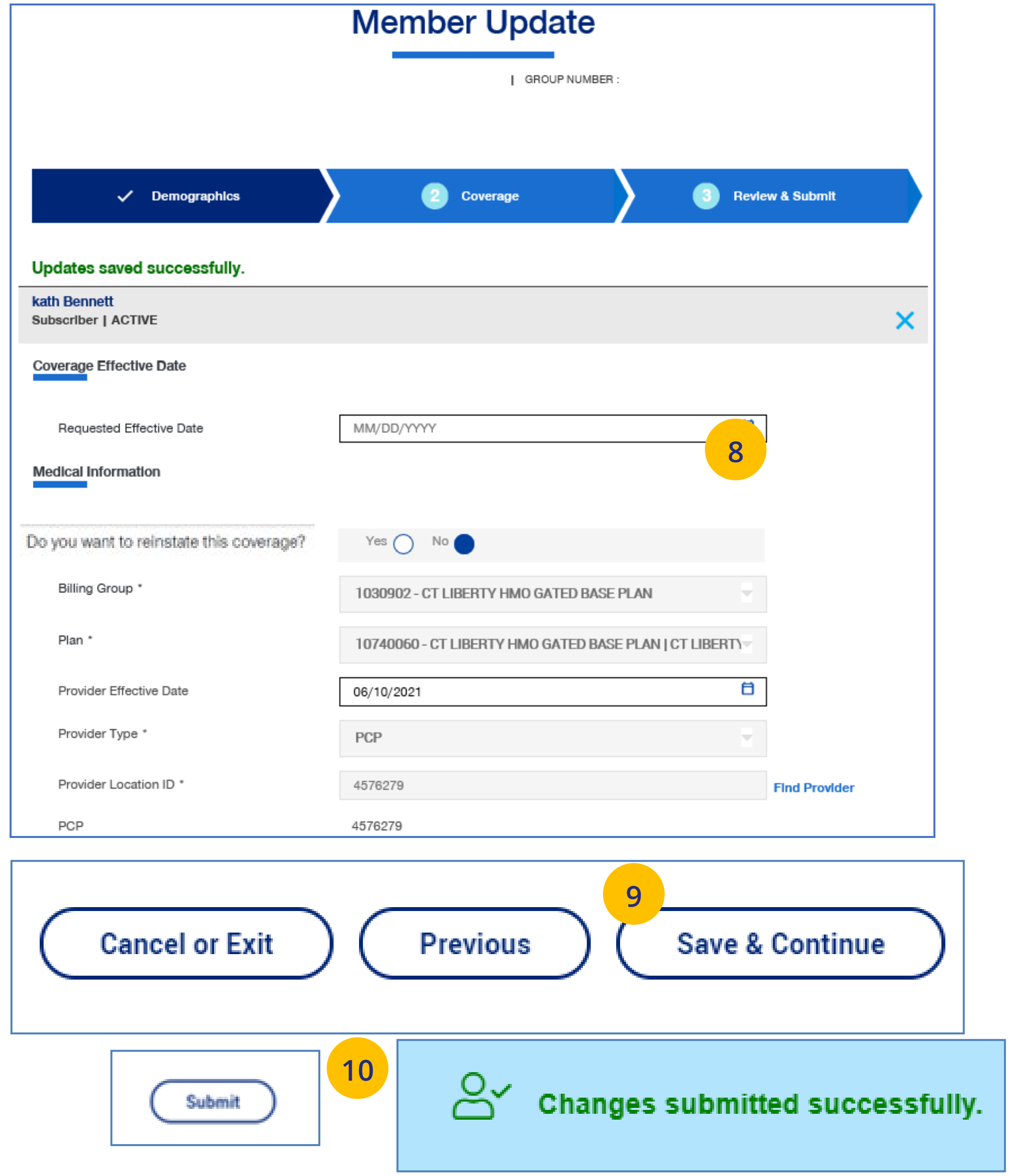


7 | Reinstate Member (continued)

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

   Note: Billing Group – For **UnitedHealthcare HMO** users, Billing Group is not available.
   Note: **Basic Life** - Any updates to Basic Life must be made by contacting Broker & Employer Services.
9. Click **Save & Continue**.
10. After completing updates, review your information and click **Submit**. A "Changes submitted successfully" message displays, telling you the member has been updated.

Newborn to Child Status – If a child dependent is in temporary **newborn** status, the coverage will terminate unless the child is enrolled as a new dependent. Once the newborn is enrolled, the status changes to **child**. If the child dependent has already been terminated, go through the reinstatement process, if needed, to reinstate the child dependent. **Remember that terminated employees must be reinstated before any dependents can be enrolled or reinstated.**
Note: Twins with the same last name and date of birth cannot be enrolled. Call Client Services at 1-866-908-5940.



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.

8 | Billing & Payment: Pay as Billed

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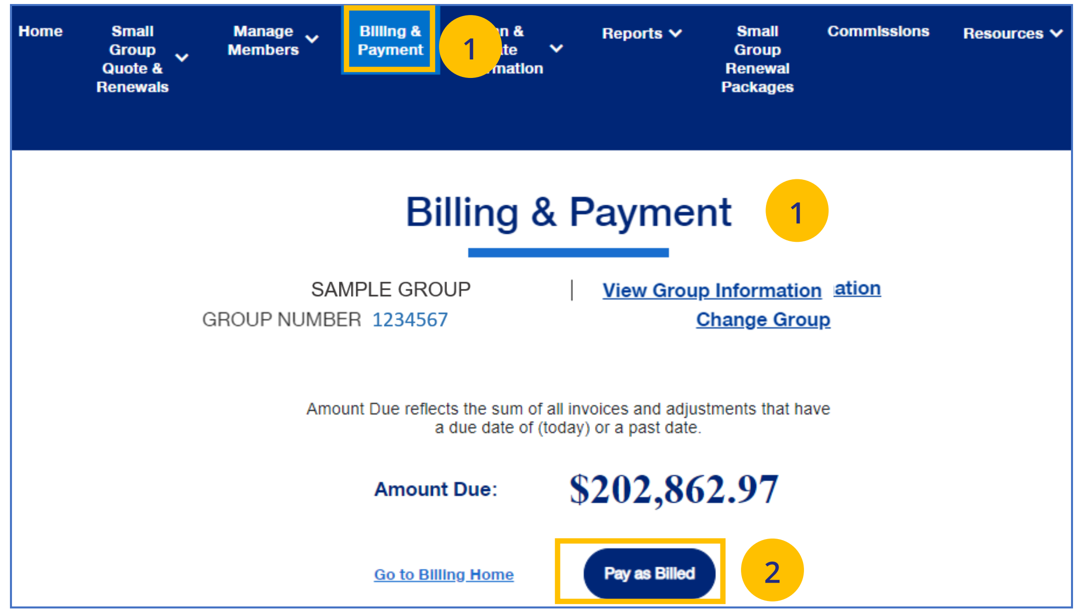
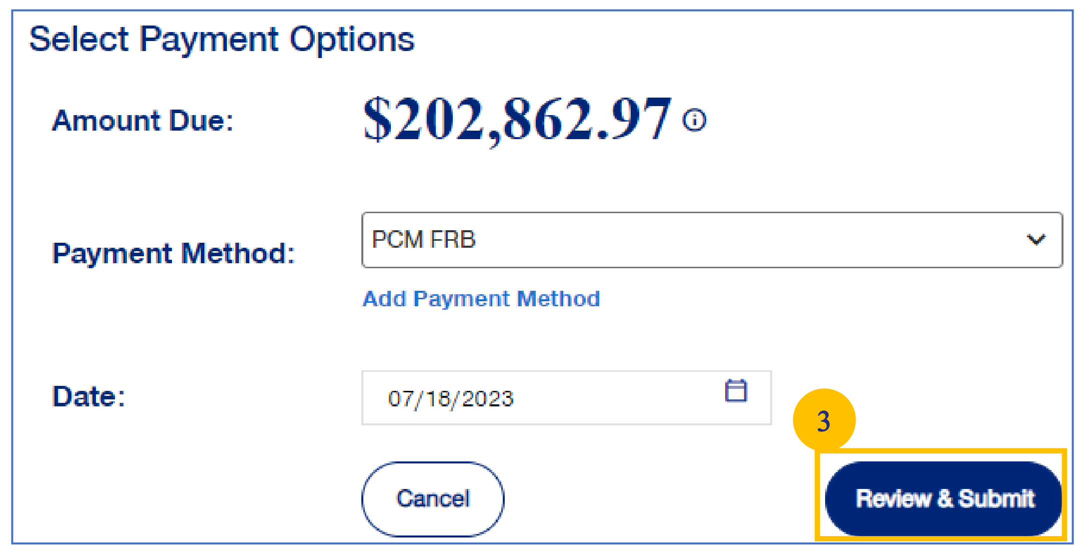
To pay a bill from the **Billing & Payment** tab, follow the steps below.

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





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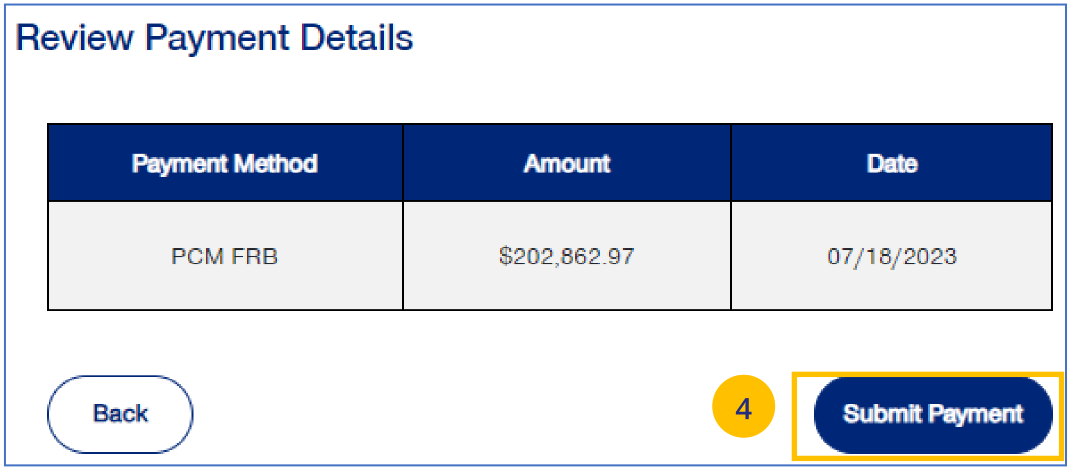
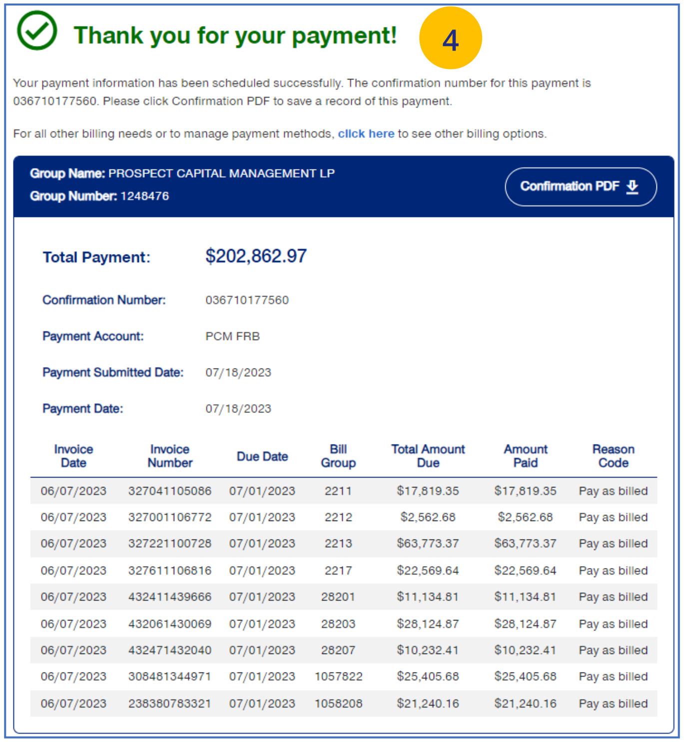
4. Review the payment details and click **Submit Payment**. You will receive conformation on your payment.

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





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

8 | Billing & Payment: Go to Billing Home

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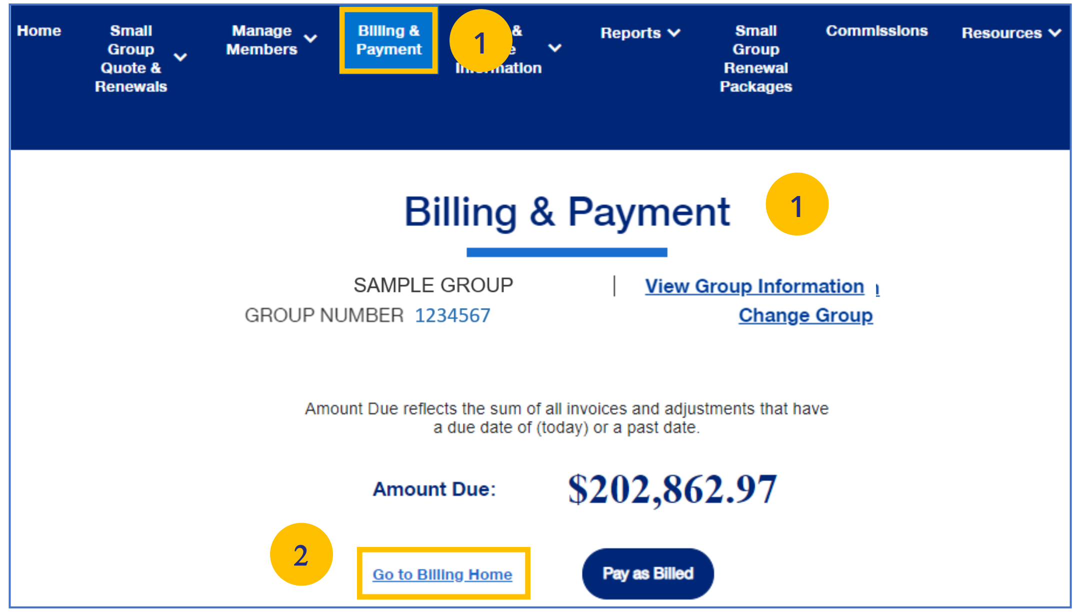
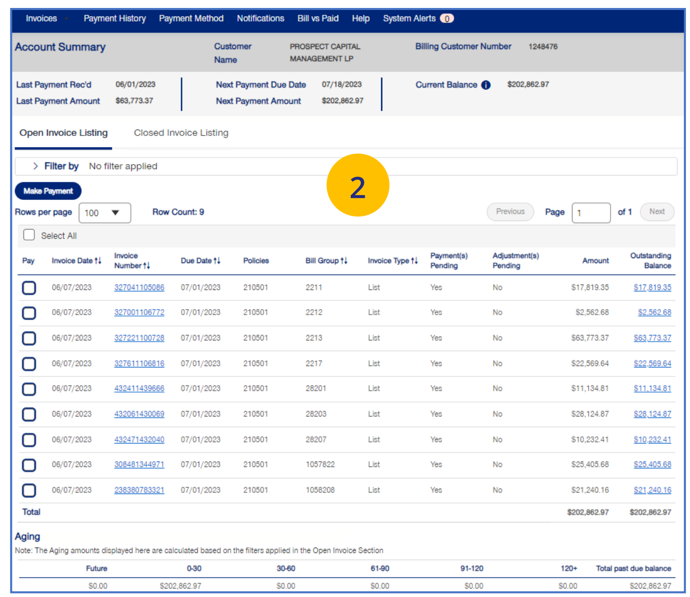
To display a group's billing information, follow the steps below.

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





9 | Reports

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

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

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

To generate the Member or Subscriber List:

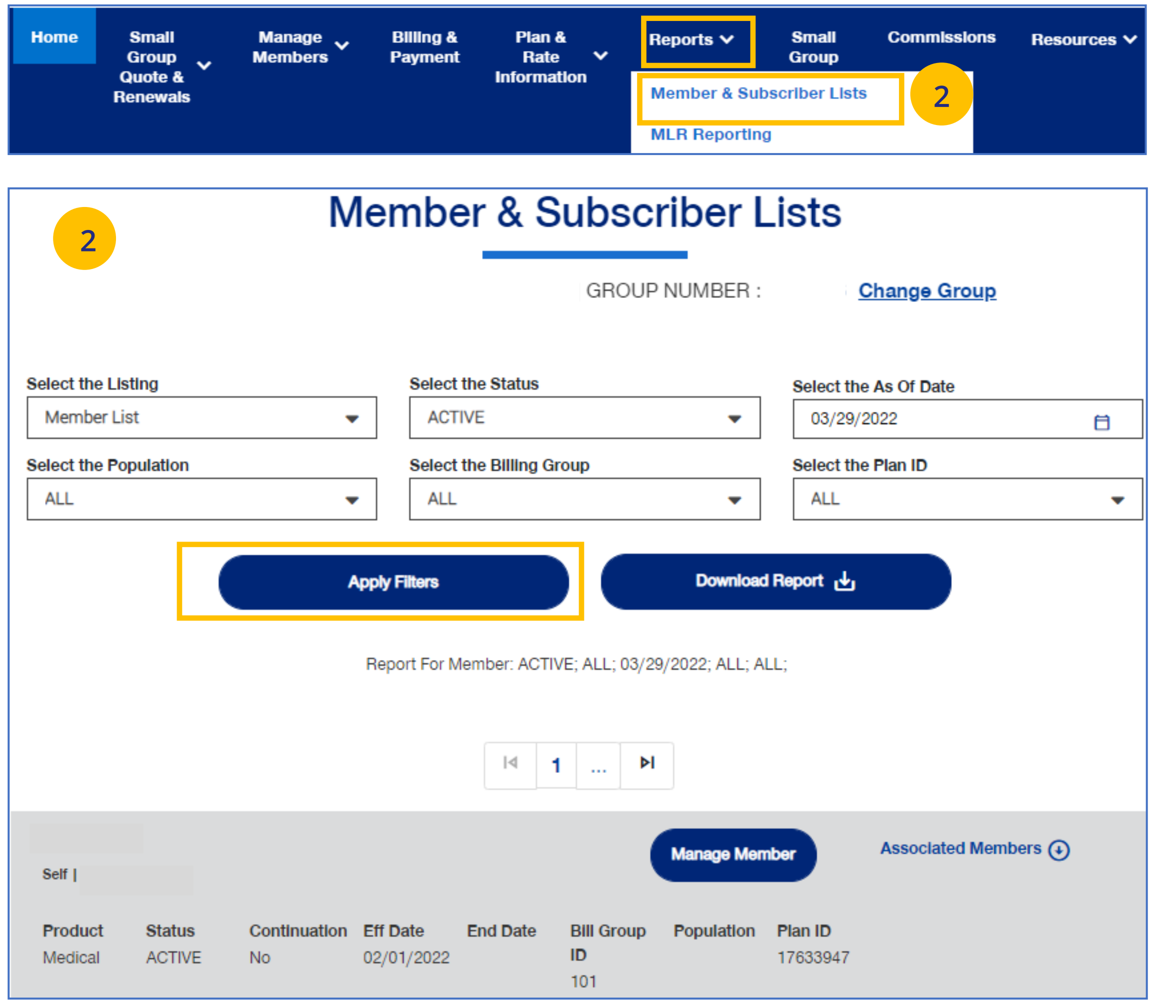
1. Click the **Reports** tab.
2. Select **Member & Subscriber Lists**. The **Member & Subscriber Lists** screen is shown.

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

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

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

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



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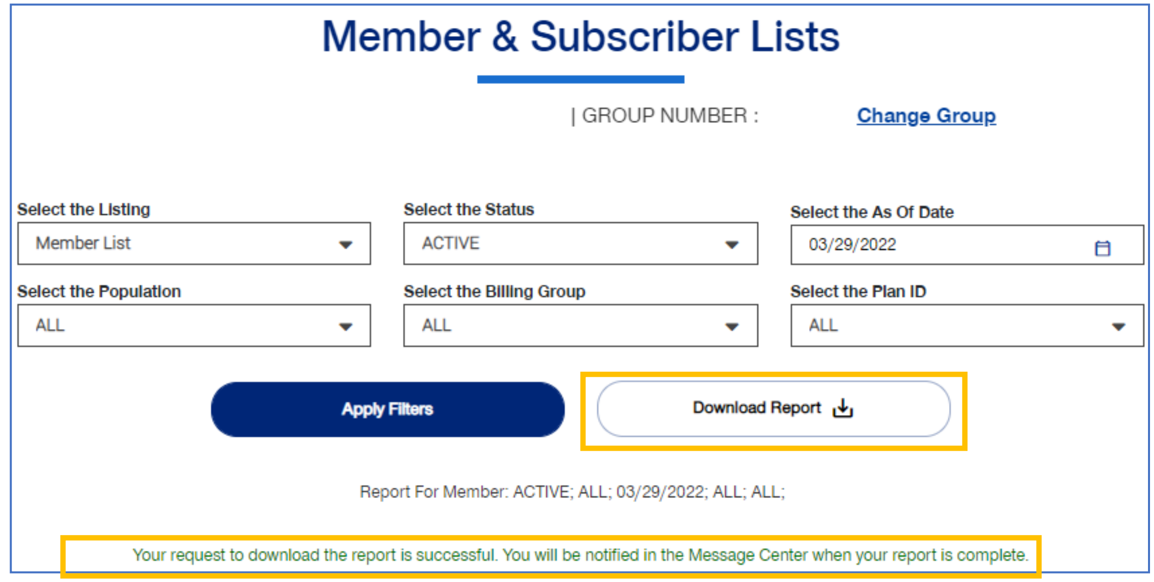
To generate the Member or Subscriber List:

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

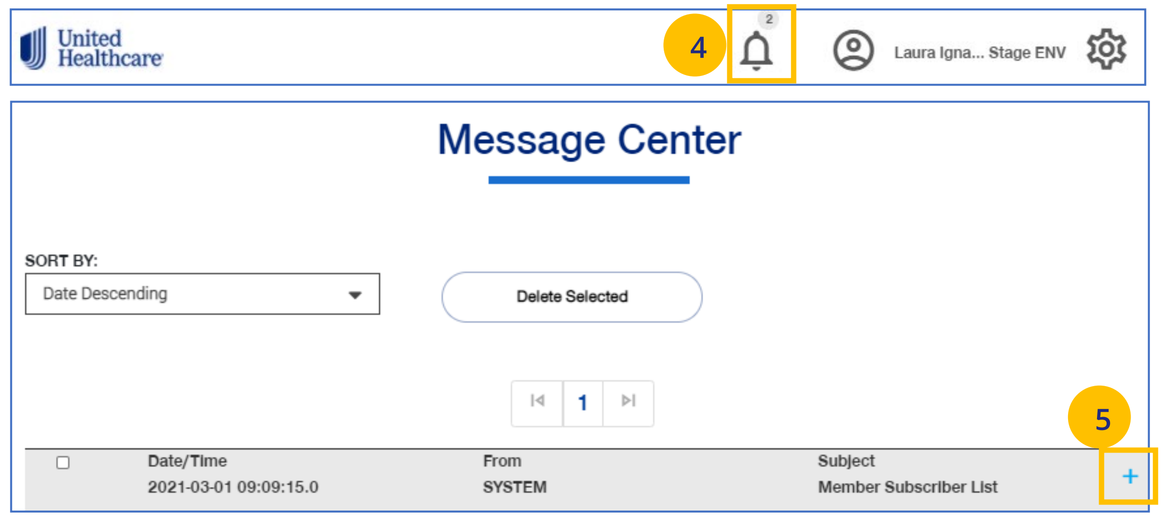


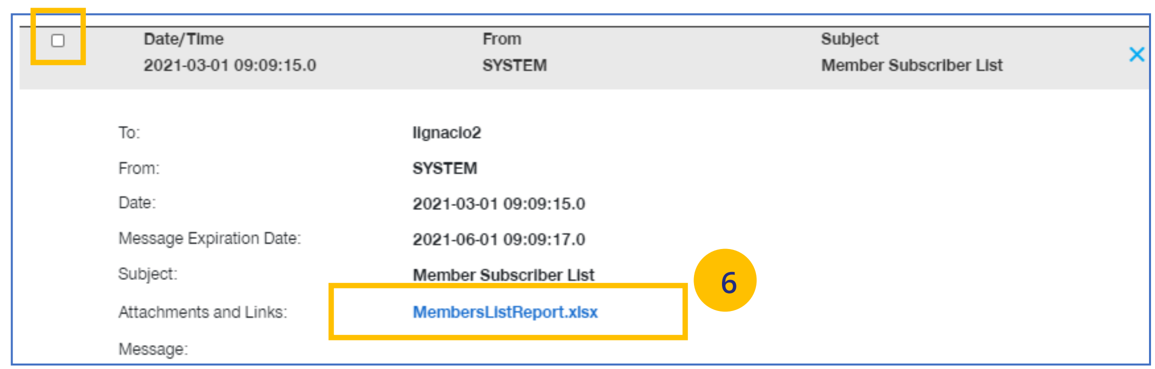
4. Click on the bell icon to open **Message Center**.

5. Click on the plus sign.

6. Click on the attachment link to display the report.

   Note: After you have finished using the report, you can delete it from the **Message Center** by checking the box and clicking the **Delete Selected** button.





9 | MLR Reporting

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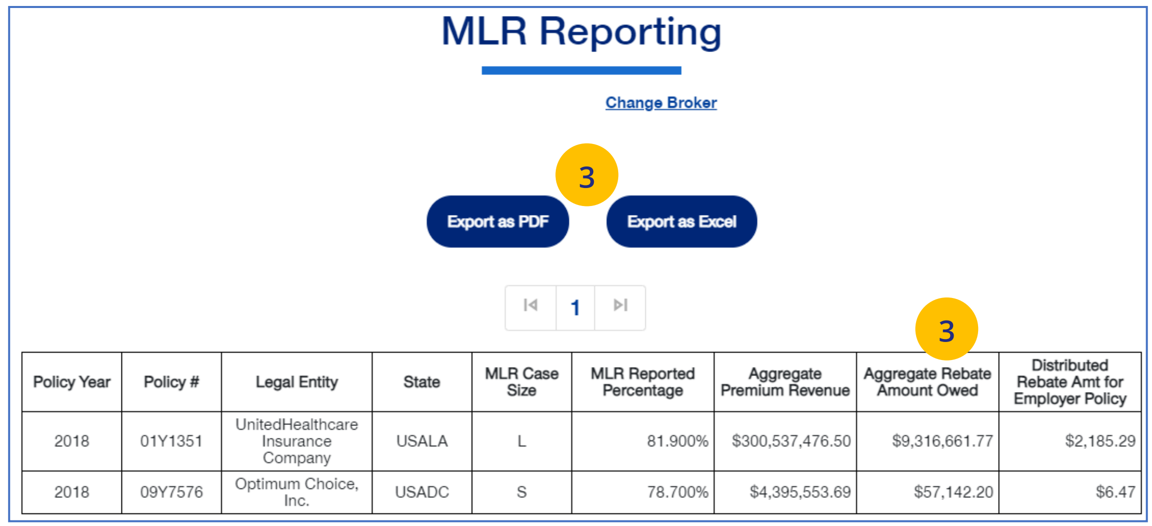
The **MLR Reporting** tab allows you to generate the Medical Loss Ratio (MLR) Information report. You can download the report as a pdf document or as an Excel file.

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

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

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

   You can view a snapshot of the report in the window or click Export to PDF to generate a pdf file or Export as Excel to download an Excel report.



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

9 | Account Overdue Balance Report

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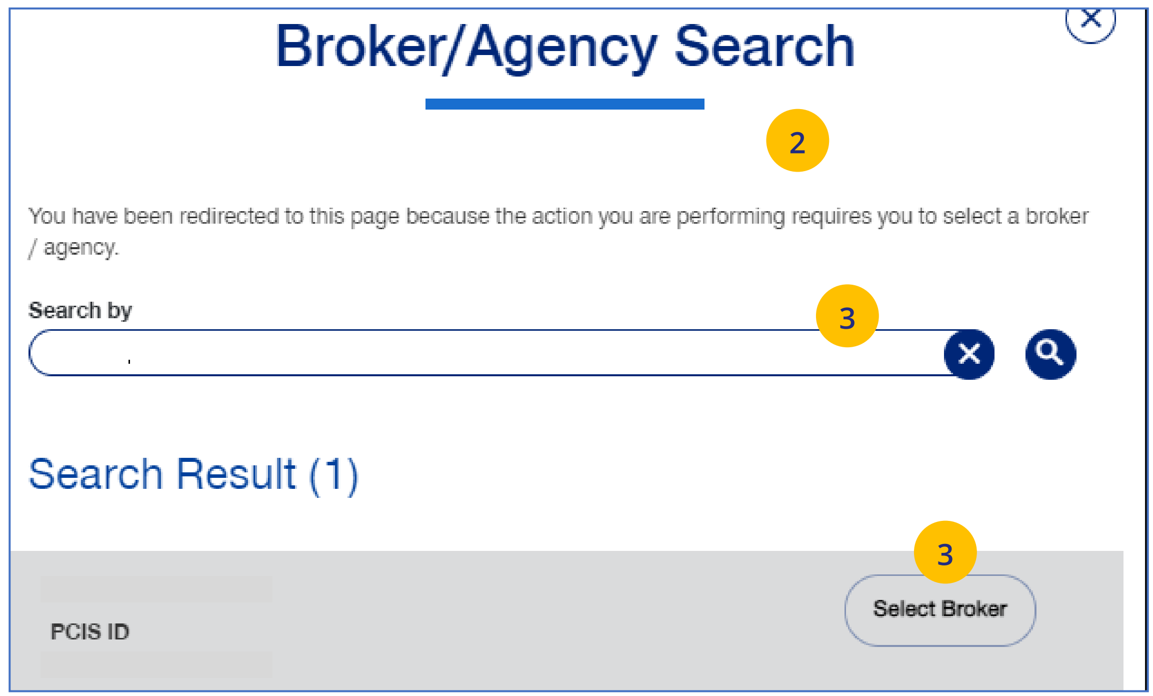
The **Account Overdue Balance Report** shows account balances for a specific date for both late groups and terminated groups.

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

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



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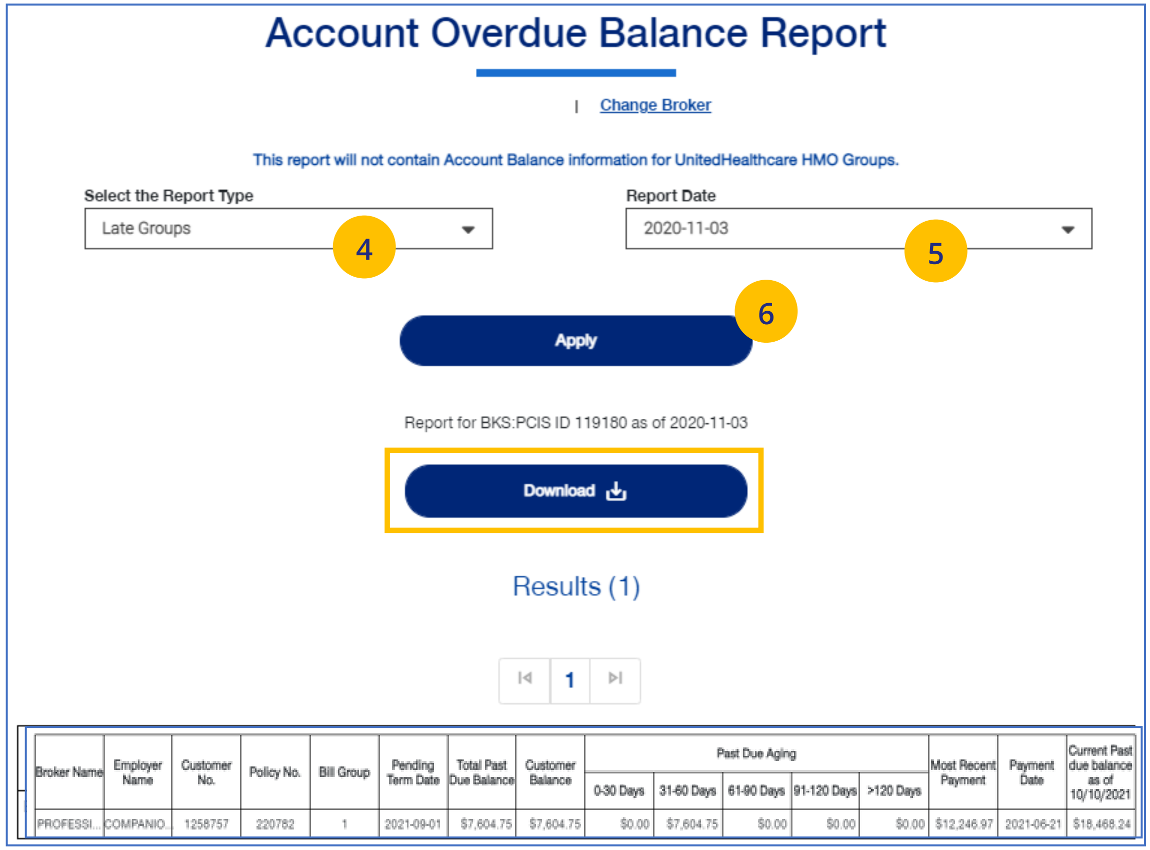
To change your search criteria:

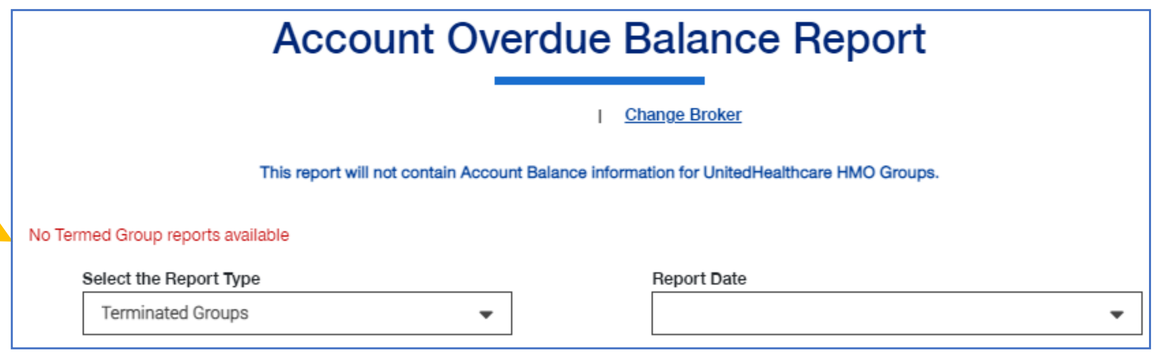
4. In the **Select the Report Type** field, select either **Late Groups** or **Terminated Groups**.
5. In the **Report Date** field, select the report date. **Note:** At this time, you must select the exact date that a report ran on the current UI.
6. Click **Apply**.

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

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

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





9 | Banking Reports

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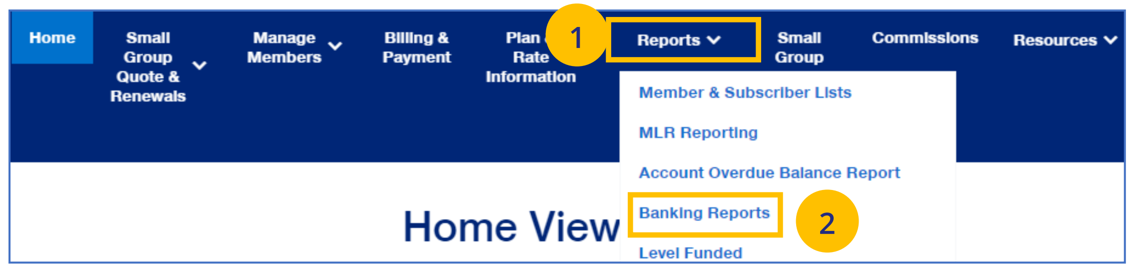
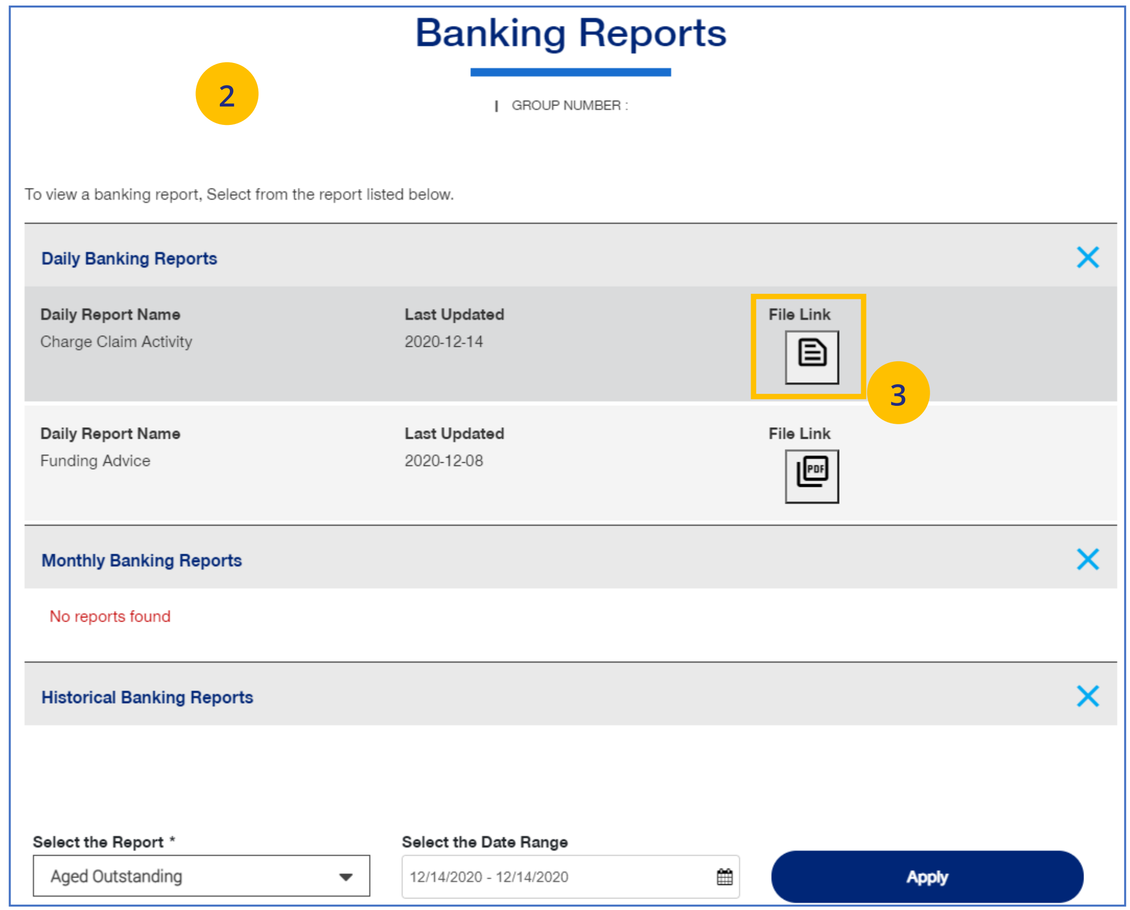
The **Banking Reports** tab allows you to generate the daily, monthly and historical banking reports for a specific Group.

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

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

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





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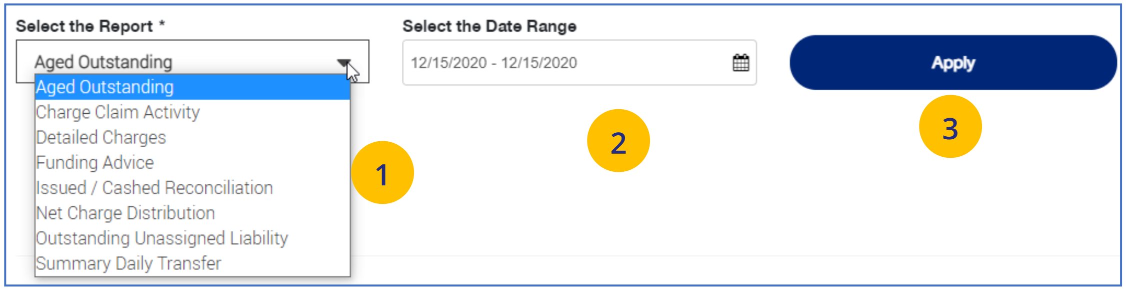
Selecting Other Reports

You can generate and view different reports using the dropdown.

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

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



Below is a list of available reports and descriptions.

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

9 | Level Funded

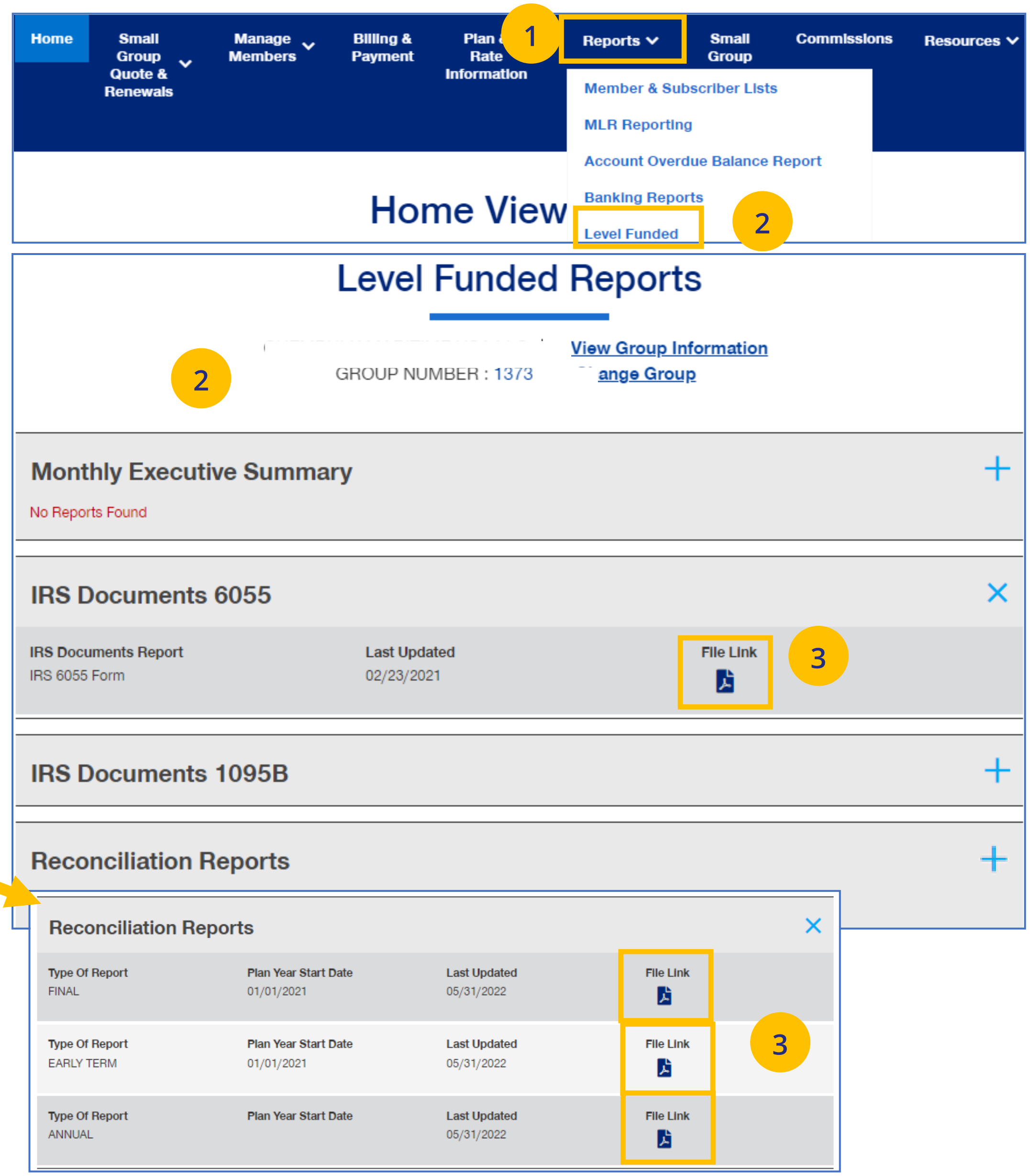
The **Level Funded** reports show the Monthly Executive Summary, the IRS Documents 6055 and IRS documents 1095 B reports and Reconciliation reports.

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

Note: This report is for Level Funded groups only.

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

   Note: If specific reports are available, a plus sign is displayed. Click the plus sign (+) to view the reports.
3. Click the specific **File Link** to view the report you need.



9 | Shared Saving Reports

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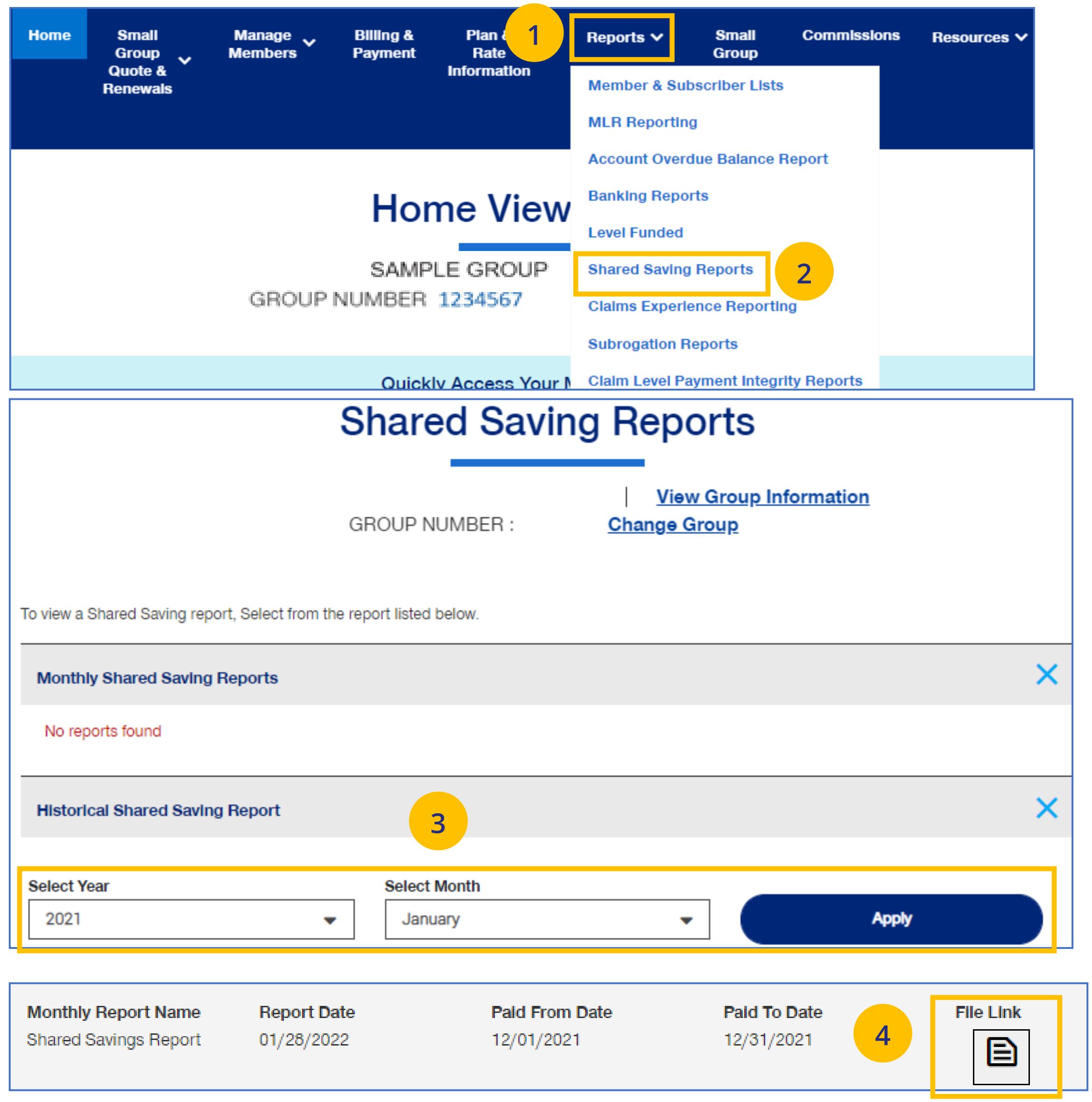
The **Shared Saving Reports** are in Excel and show claims (summary and detail) for a specific month and year. Historical reports are also available.

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

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

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



9 | Claims Experience Reporting

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

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

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

9 | Subrogation Reports

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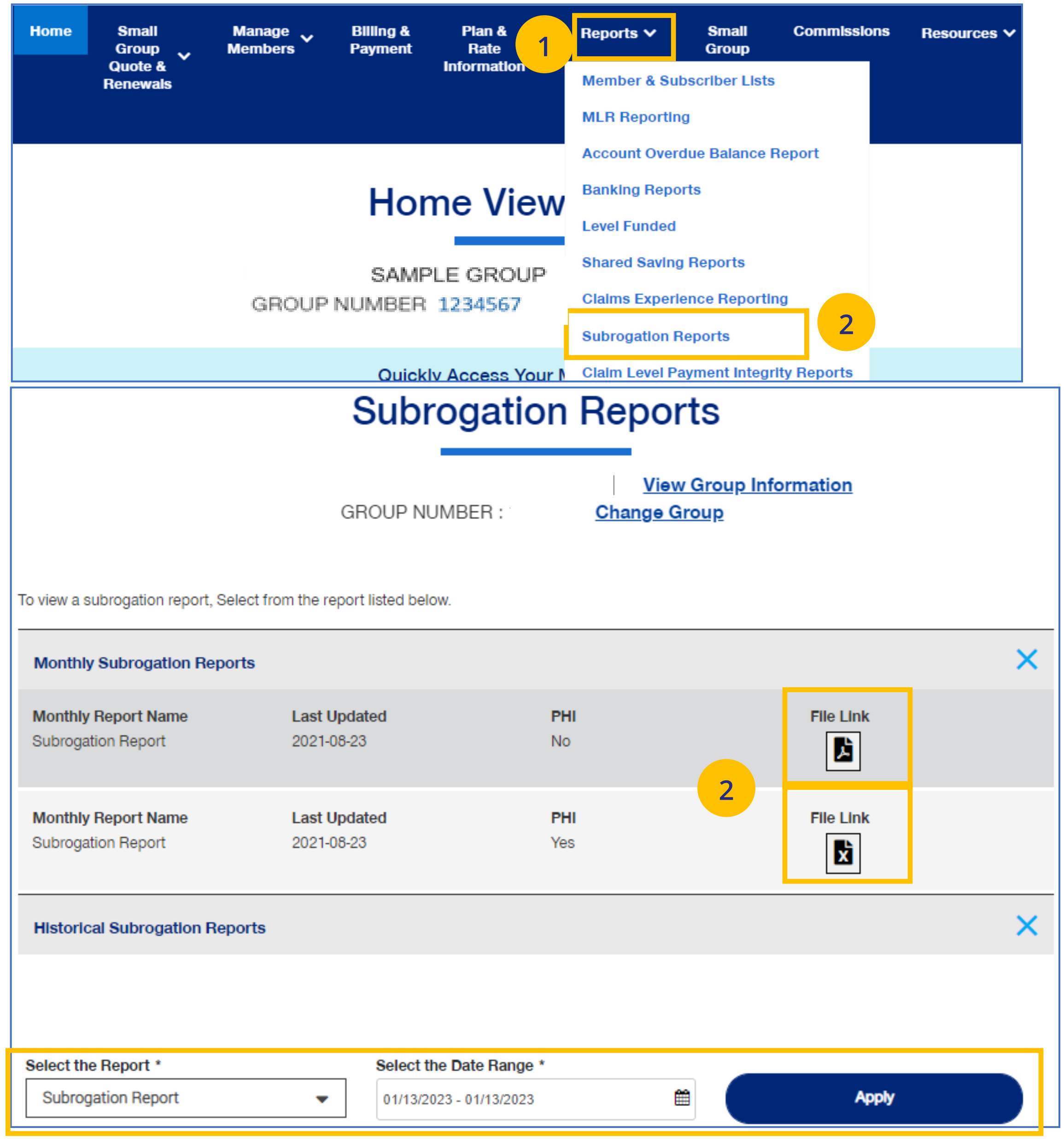
The **Subrogation Reports** show information for a specific month and year. Historical reports are also available.

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

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

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

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



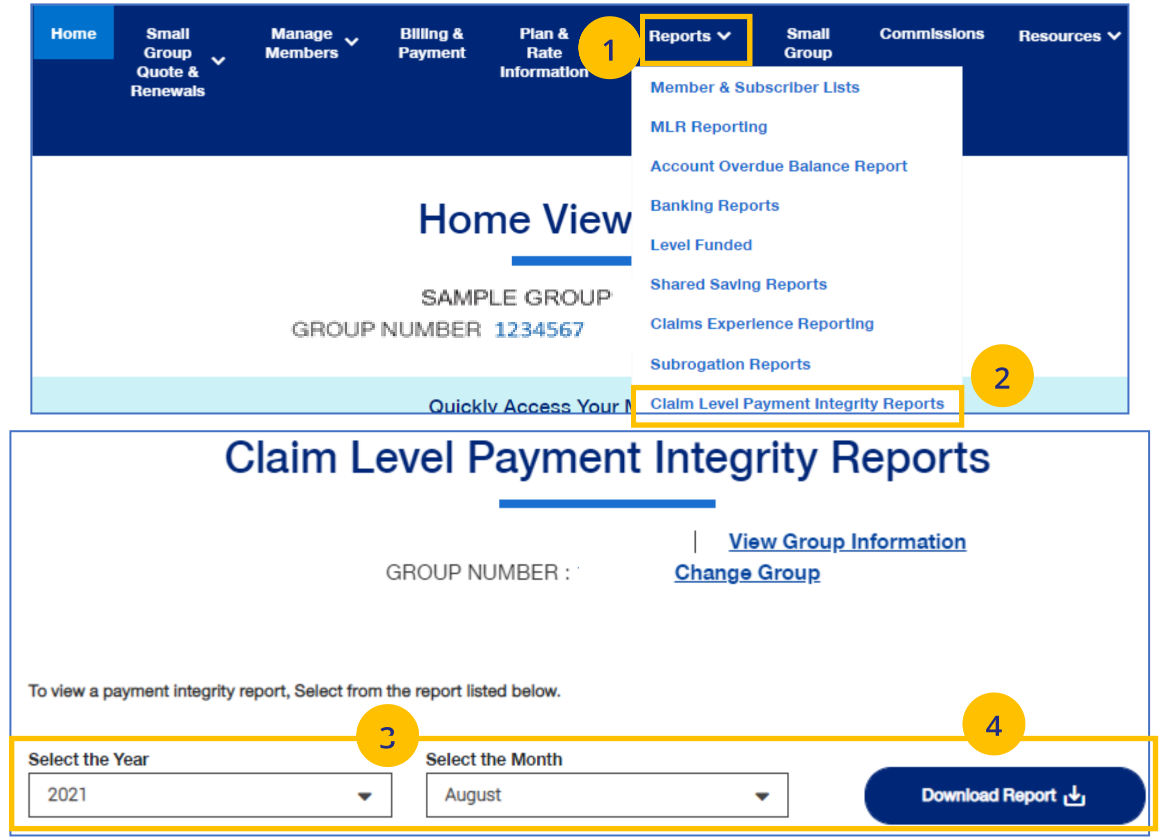
9 | Claim Level Payment Integrity Reports

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

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

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

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



9 | Payroll Reports

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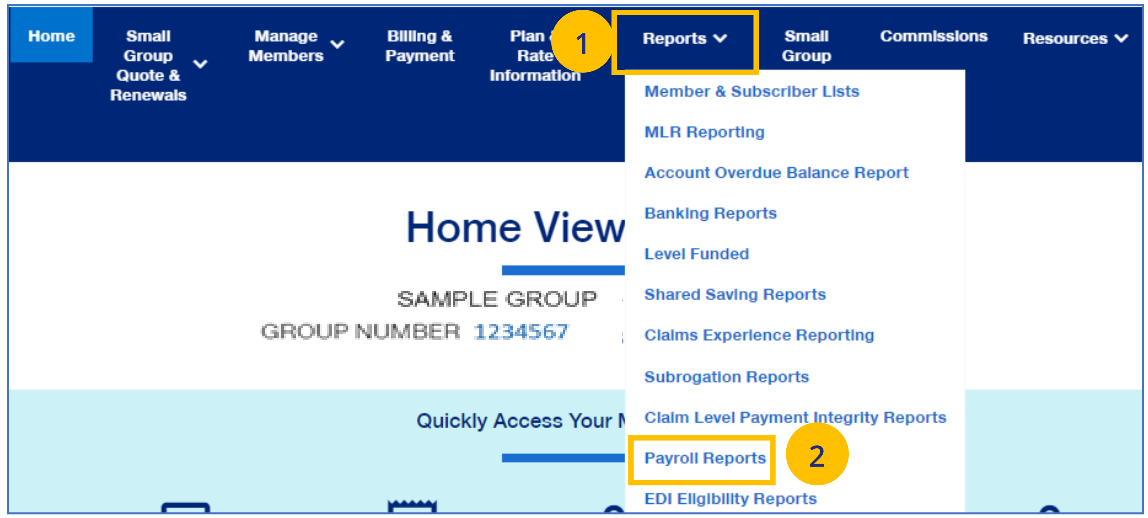
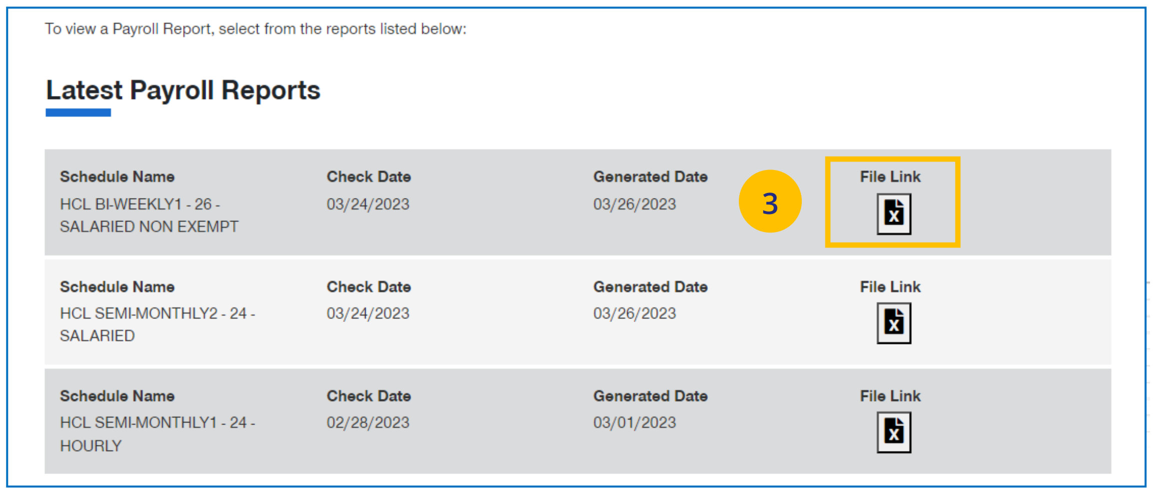
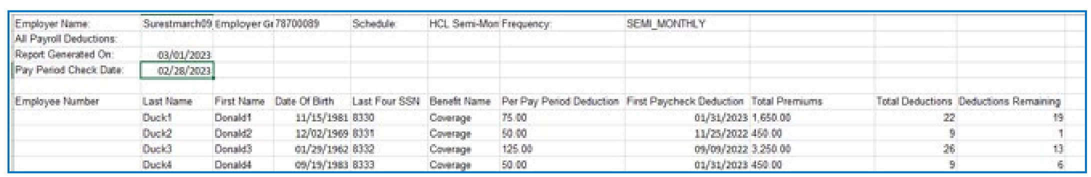
The **Payroll Reports** show detailed data for specific check dates, providing a high-level overview of all payments.

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

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







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

9 | EDI Eligibility Reports

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

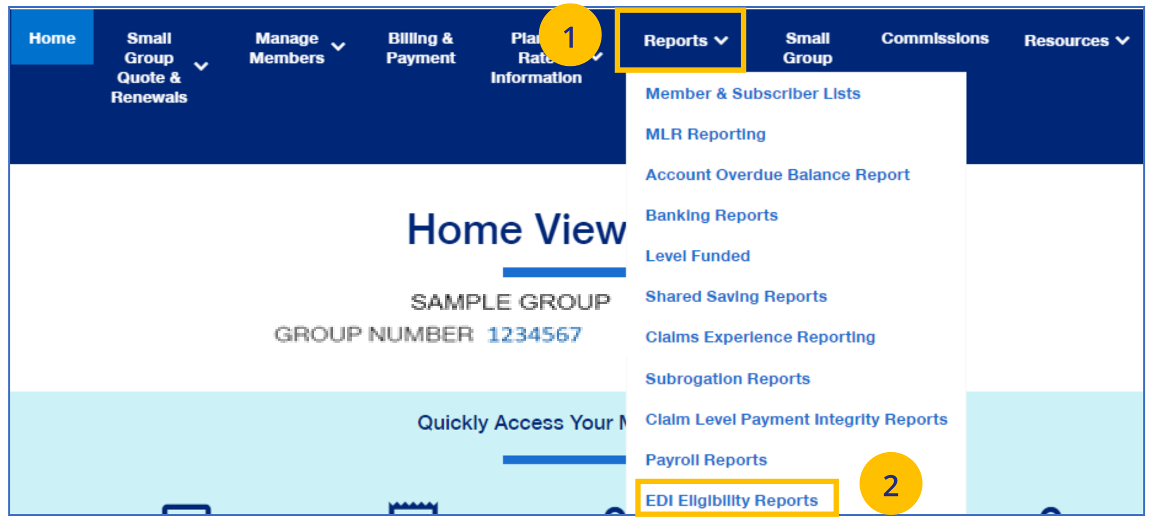
1. Click the **Reports** tab.
2. Select **EDI Eligibility Reports**. The **EDI Eligibility Reports** window displays with reports that fall within the default time period.

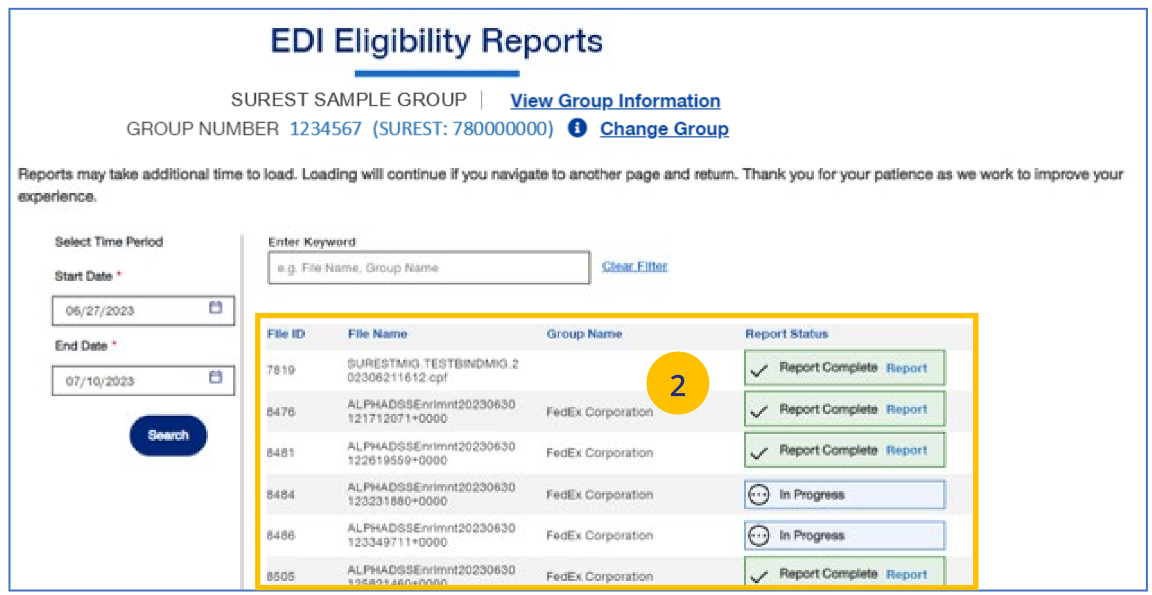
   Each report will show a **File ID**, **File Name**, **Group Name** and **Report Status**.

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

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

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





9 | EDI Eligibility Reports (continued)

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

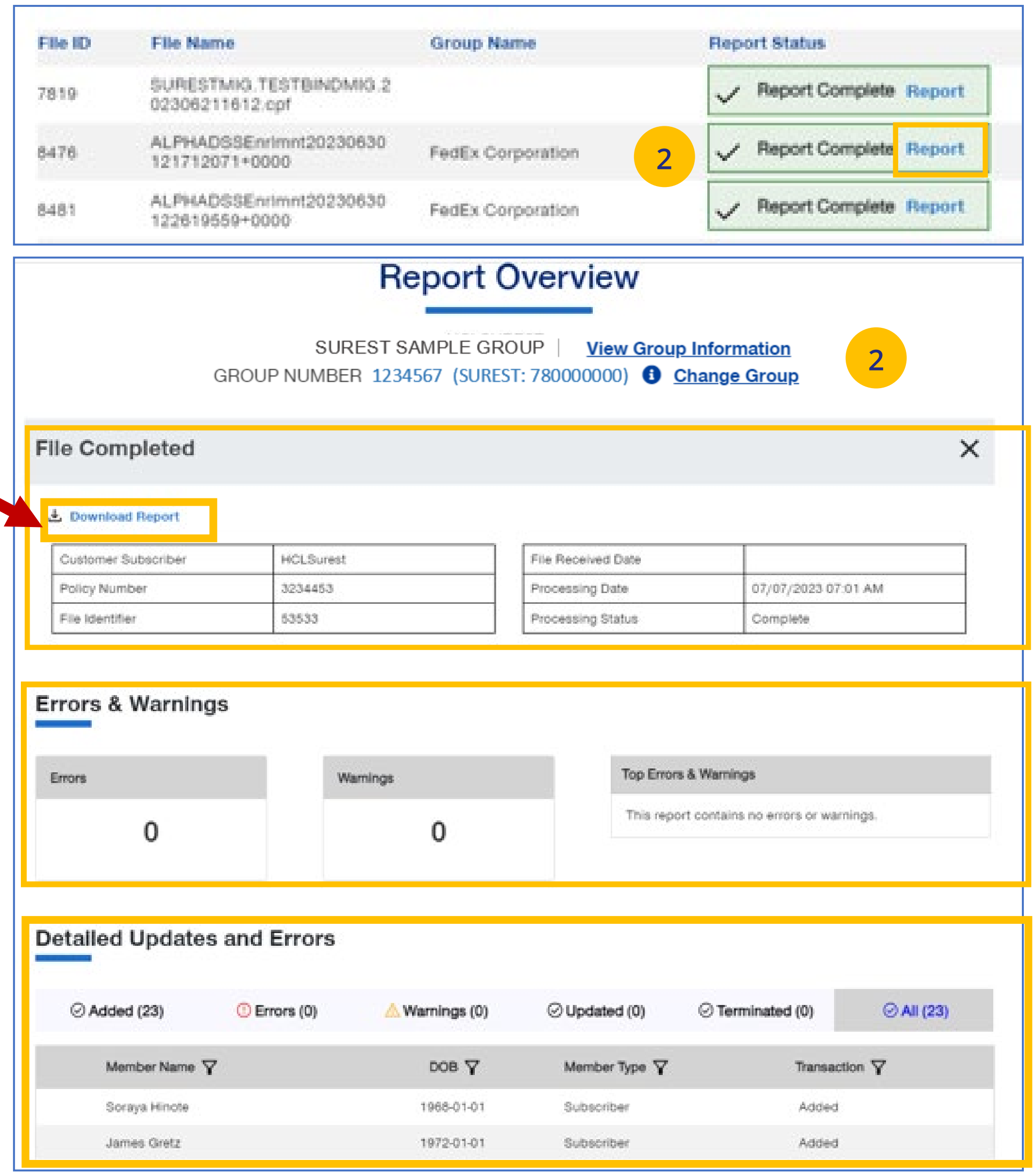
   Below is a description of the sections of the report:

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

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

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

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



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

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

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

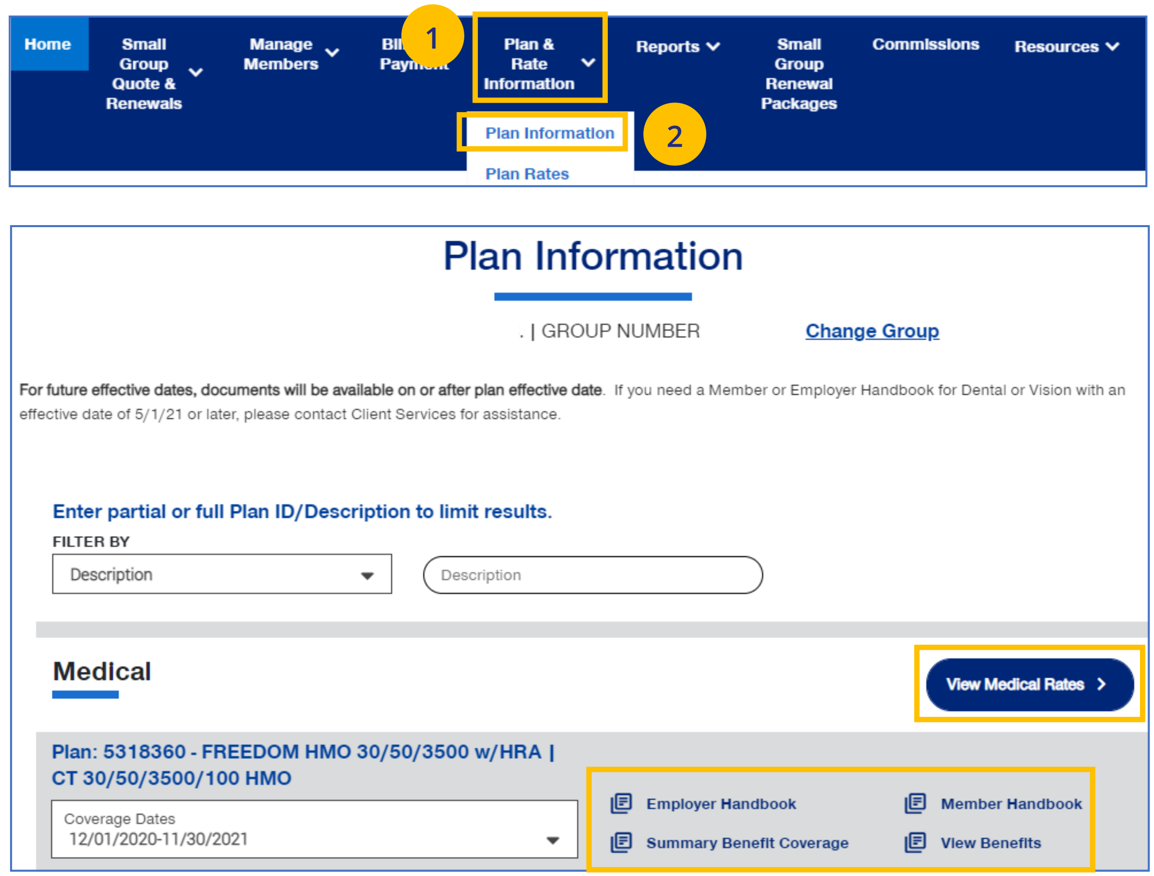
To View Plan Information:

1. Click the **Plan & Rate Information** tab.
2. Click **Plan Information.** The **Plan Information** screen will be shown.
3. Click on the specific document link to view the document.

   Note: The documents available for **UnitedHealthcare HMO** users are **Summary of Benefit Coverage (SBC)** and **Schedule of Benefits**.

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

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

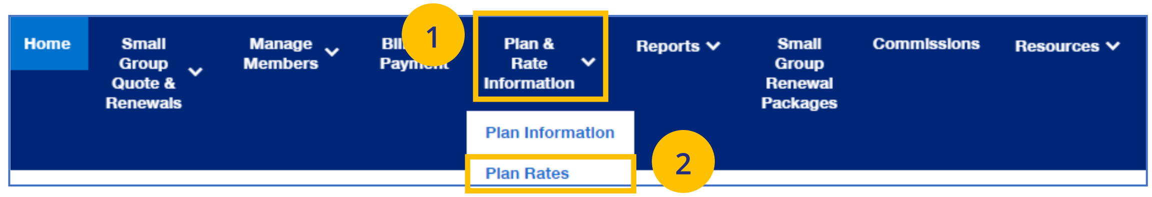


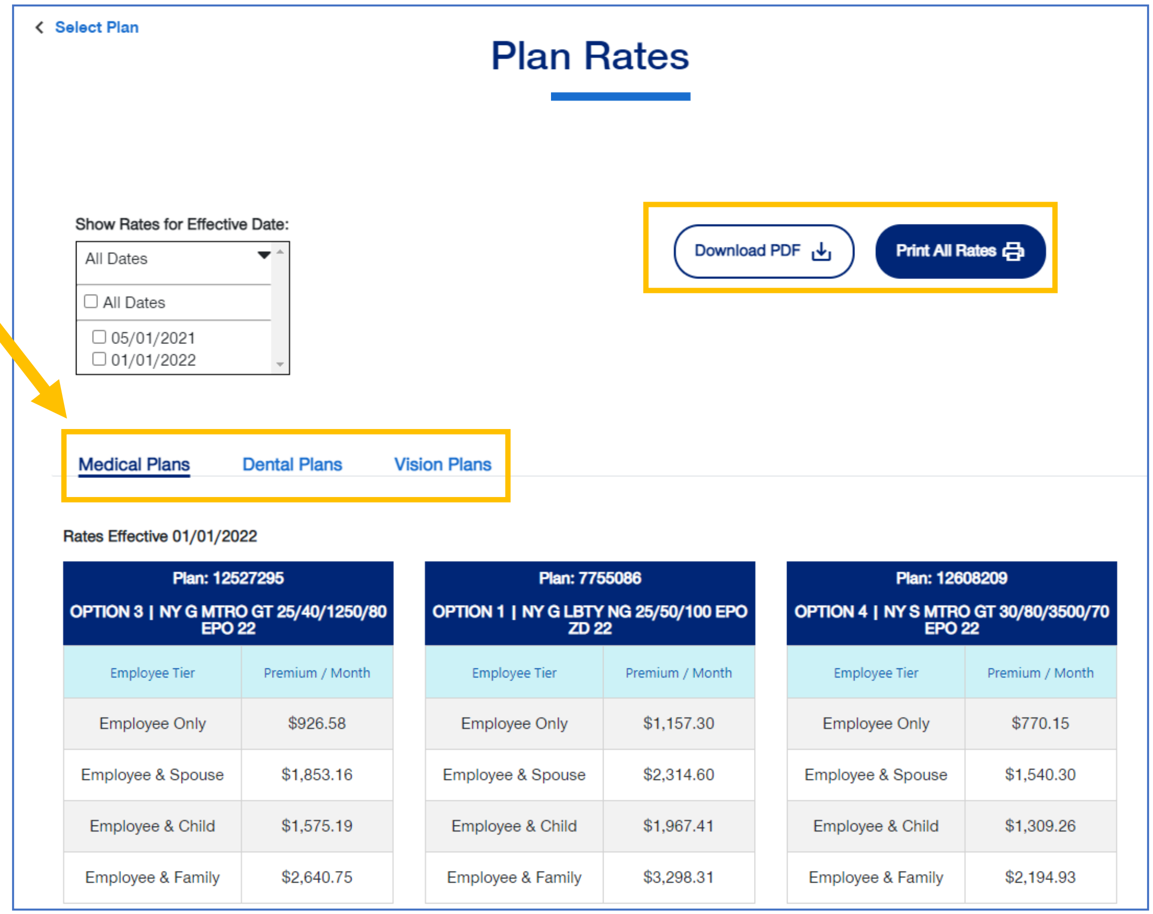
To View Medical, Vision and Dental Rates:

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

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

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





10 | View Benefits

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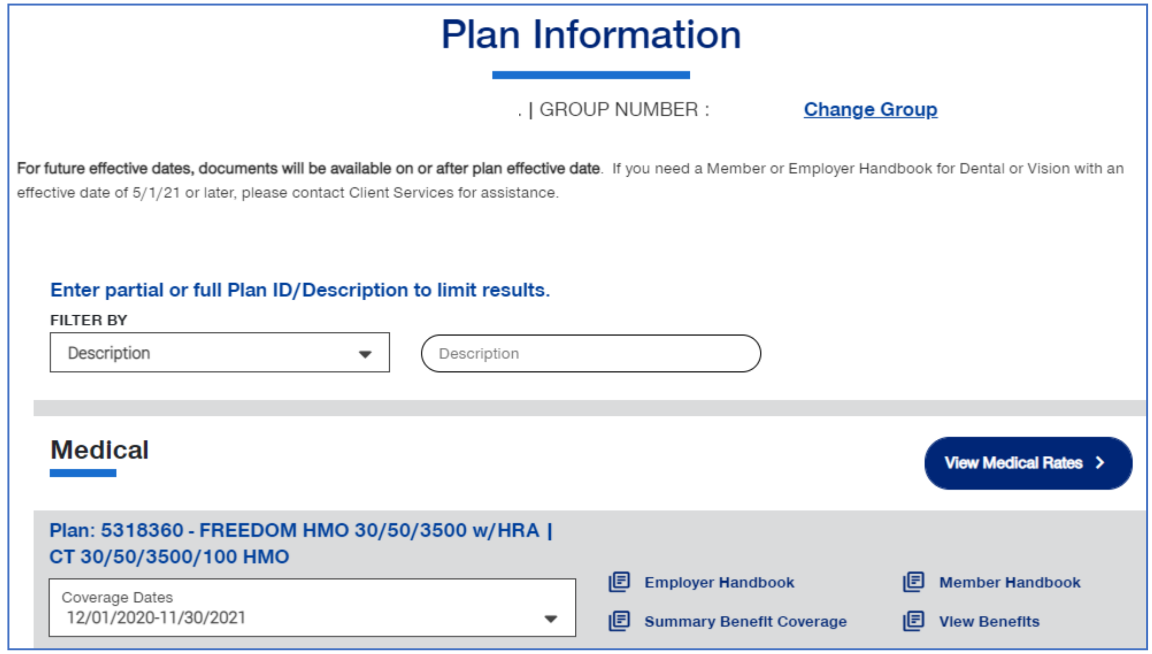
The **View Benefits** link allows you to view benefits for a specific plan.

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

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

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



10 | Summary Benefit Coverage

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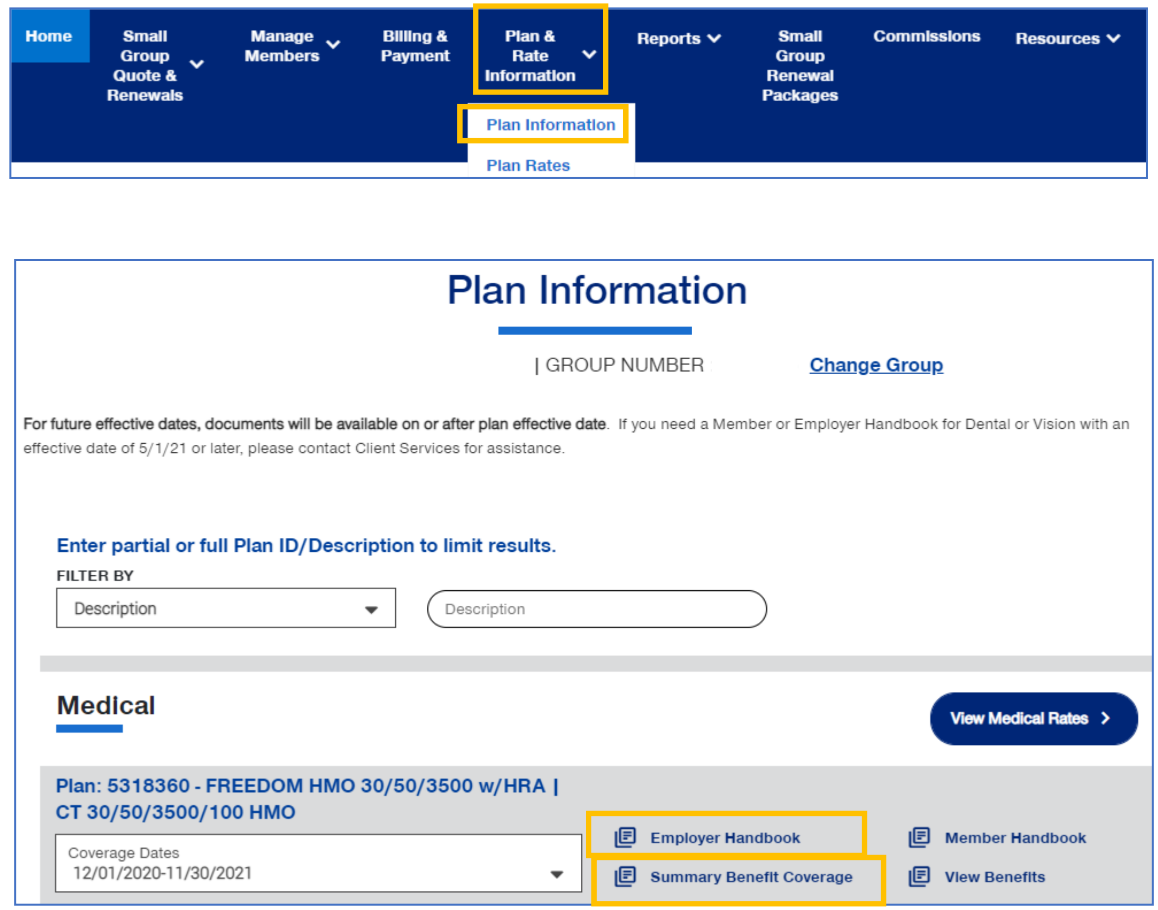
The **Summary Benefits Coverage** link allows you to view the **Summary of Benefits and Coverage** for each plan.

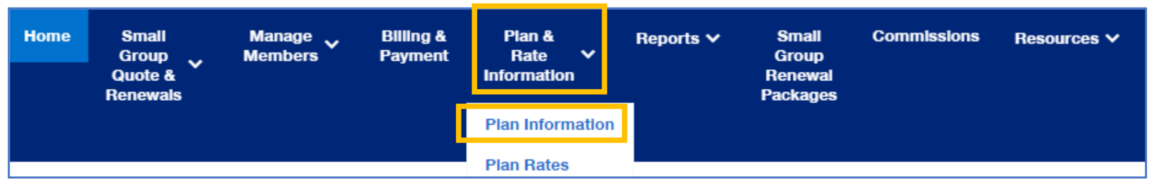
You can filter the report to show only specific plans or all plans.

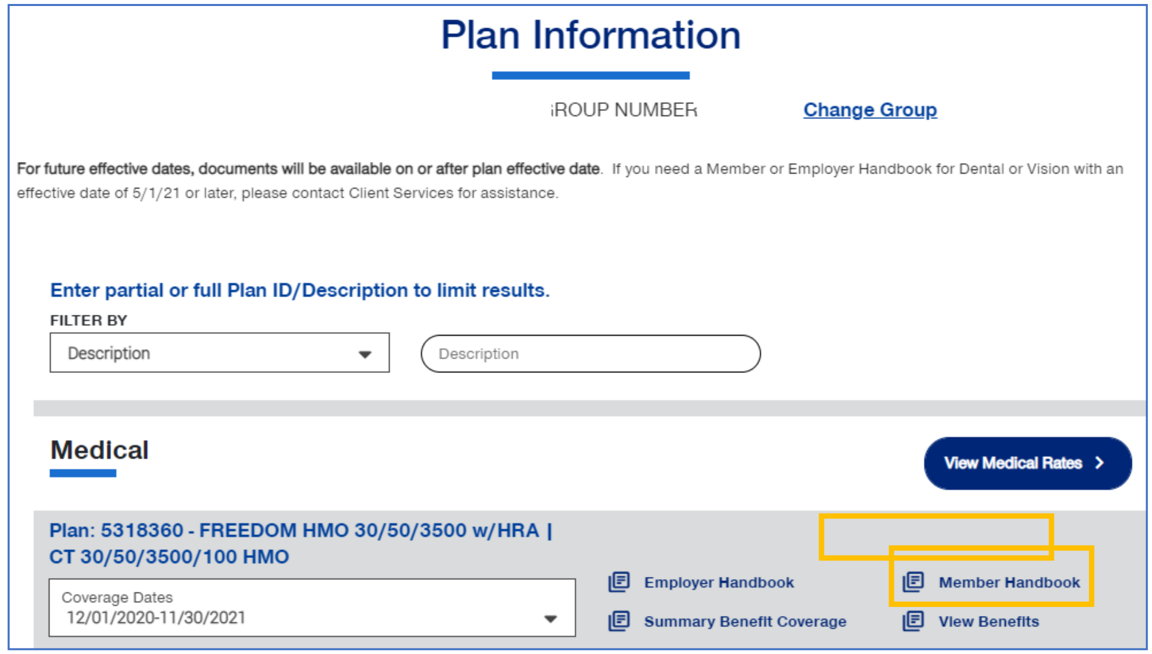


10 | Member Handbook

The **Member Handbook** link allows you to view the Member Handbook for each plan.

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





10 | Employer Handbook

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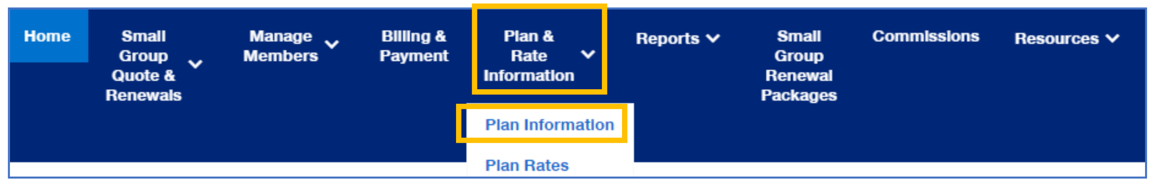
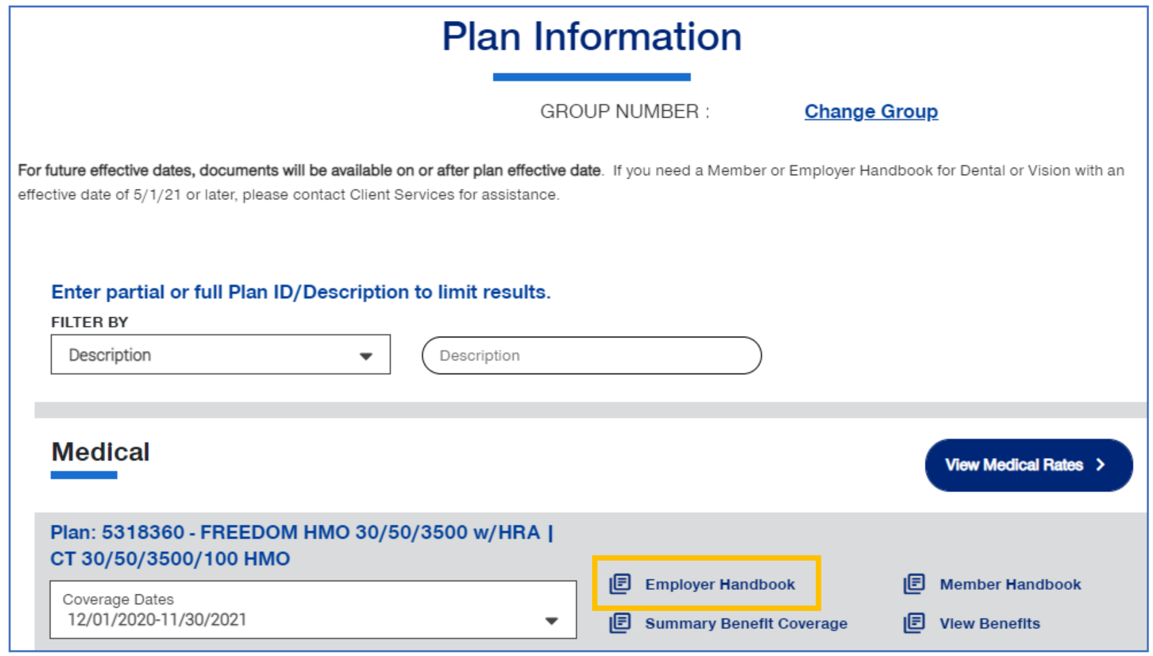
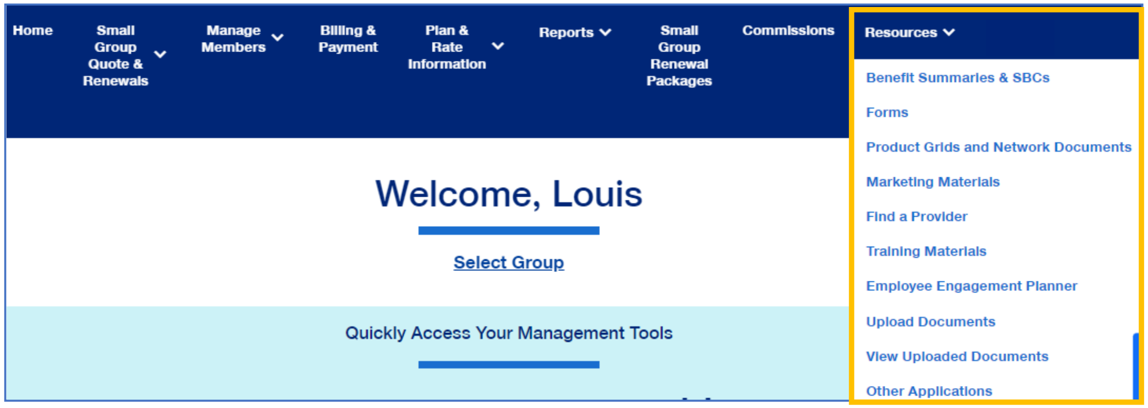
The **Employer Handbook** link allows you to view the Employer Handbook for each plan. You can filter the report to show only specific plans or all plans.





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

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



11 | Benefit Summaries & SBCs

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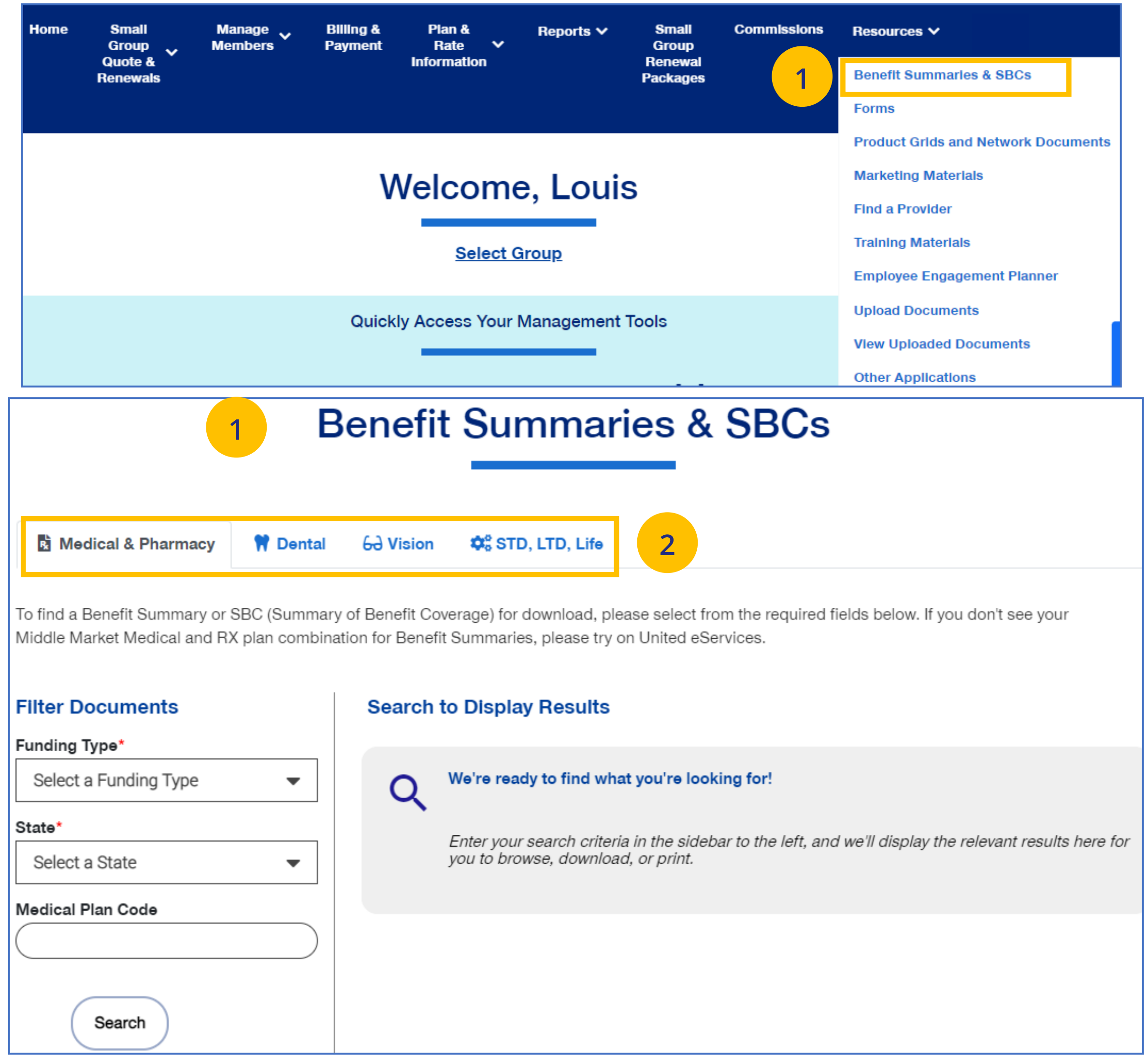
The **Benefit Summaries & SBCs** option allows you to search for and download benefit summaries or the SBC (Summary of Benefit Coverage) by funding type and state.

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.



11 | Benefit Summaries & SBCs (continued)

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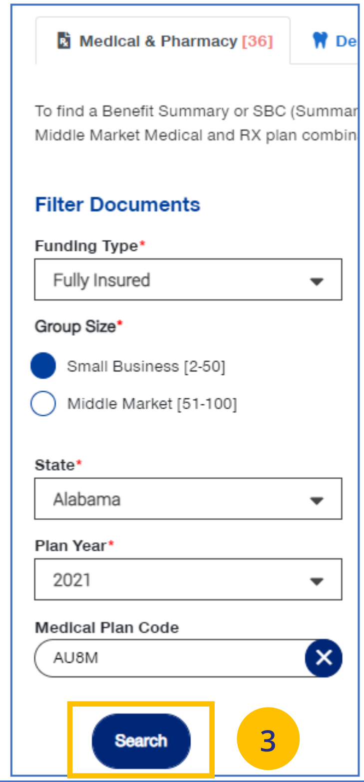
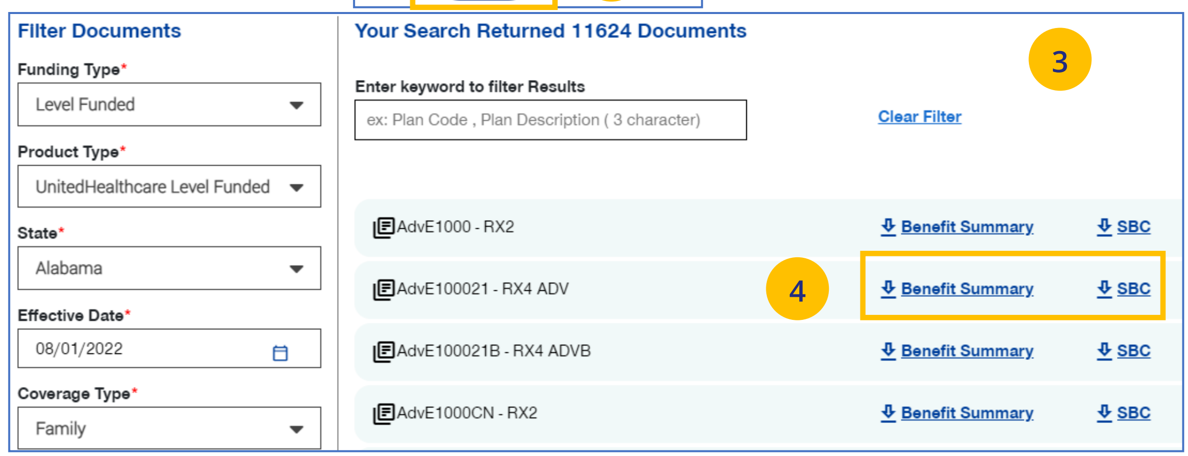
3. Click **Search**. The search results will return in the window.
4. Click the specific link to download the document you need.





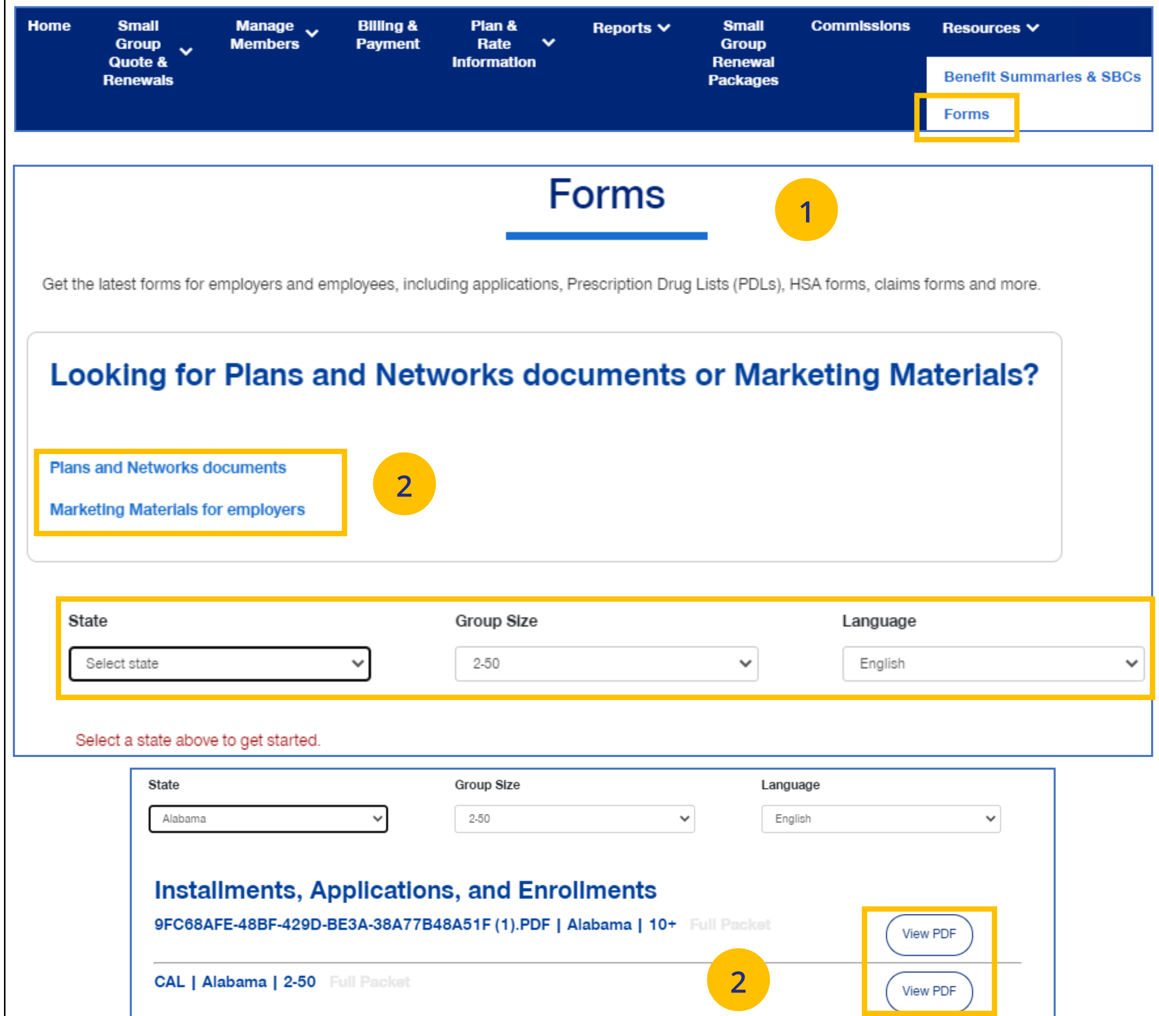
11 | Forms

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

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

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

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



11 | Product Grids and Networks Documents

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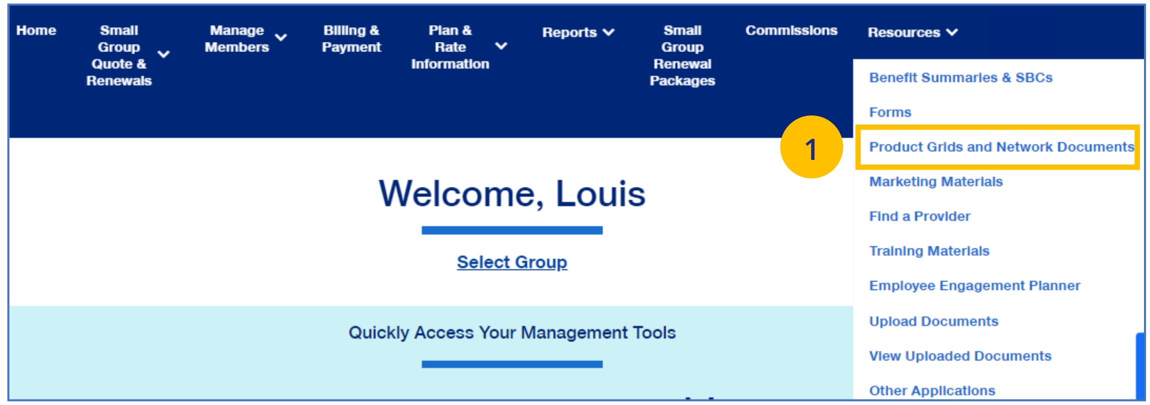
The **Product Grids and Networks Documents** link provides access to product grids, network brochures and other documents for medical and specialty plans across fully insured and level funded plans.

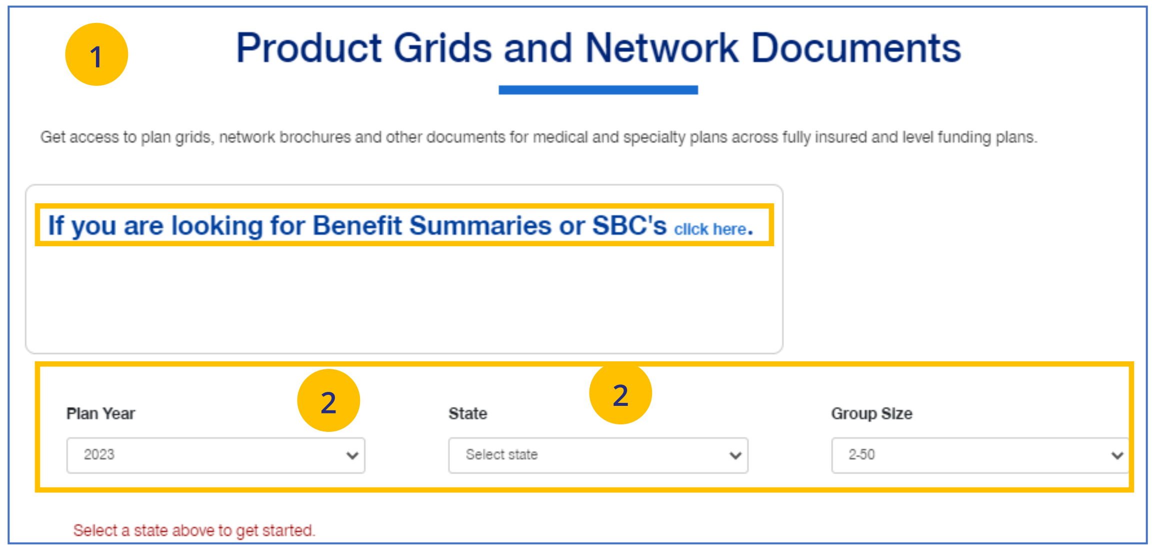
1. Click the **Product Grids and Network Documents** link. The **Product Grids and Network Documents** screen displays.

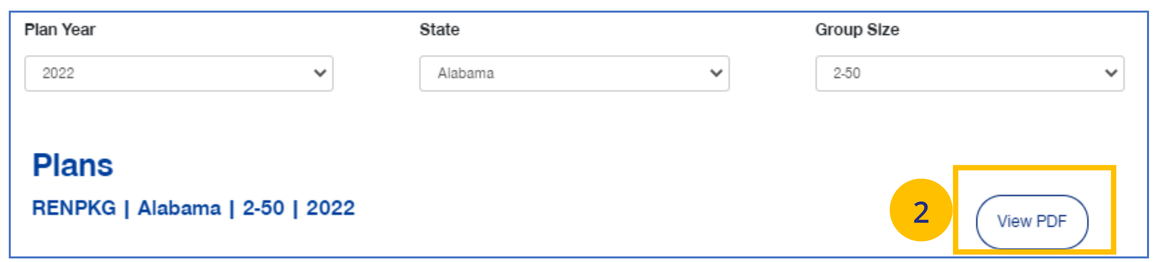
2. You can (1) click the link to view **Benefit Summaries or SBCs** or (2) select a state to access forms for that state. In addition to State, you can also select a Plan Year and Group Size.

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

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







11 | Marketing Materials

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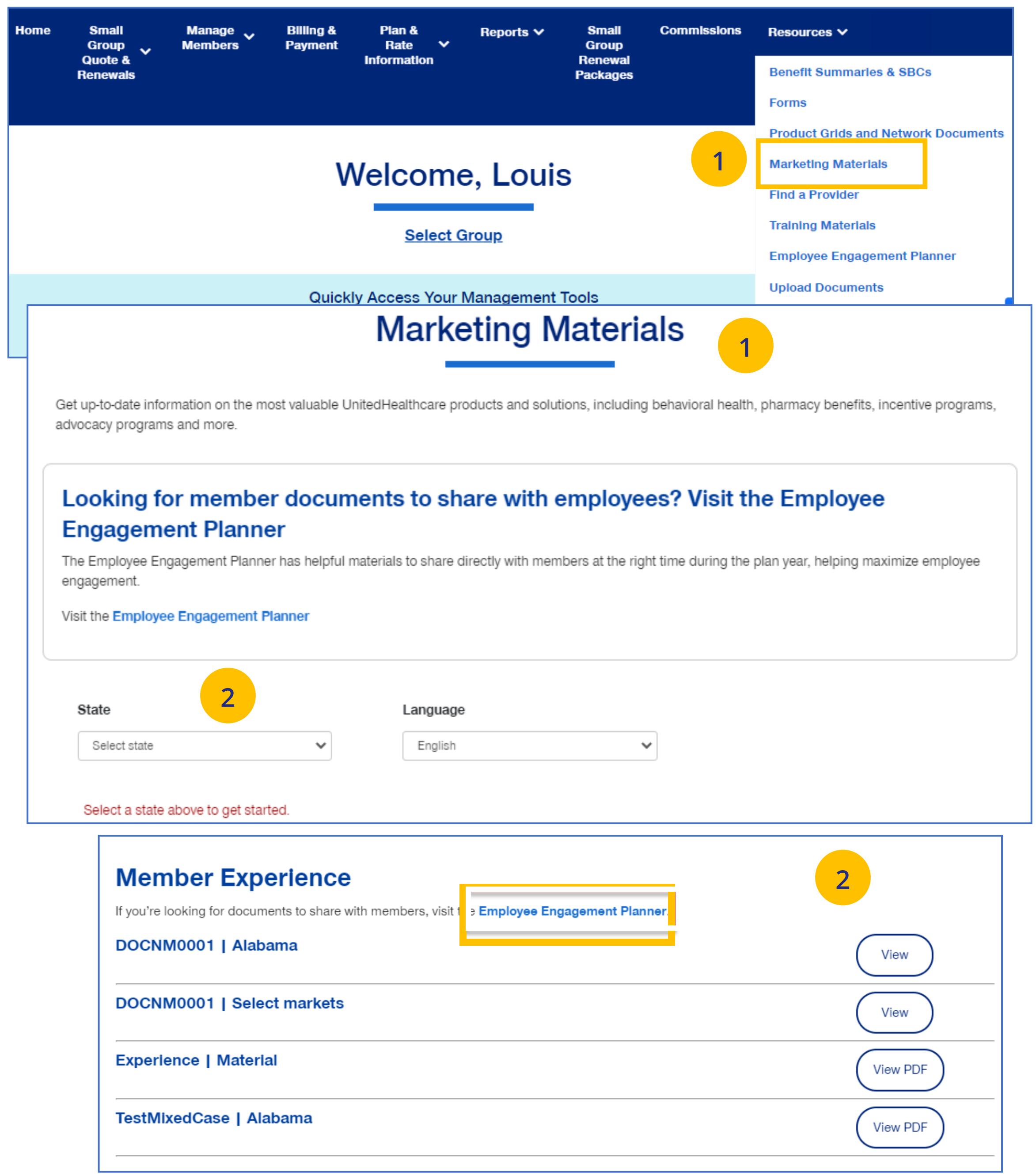
The **Marketing Materials** link Information on UnitedHealthcare products and solutions, including behavioral health, pharmacy benefits, incentive programs and advocacy programs.

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

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



11 | Find a Provider

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

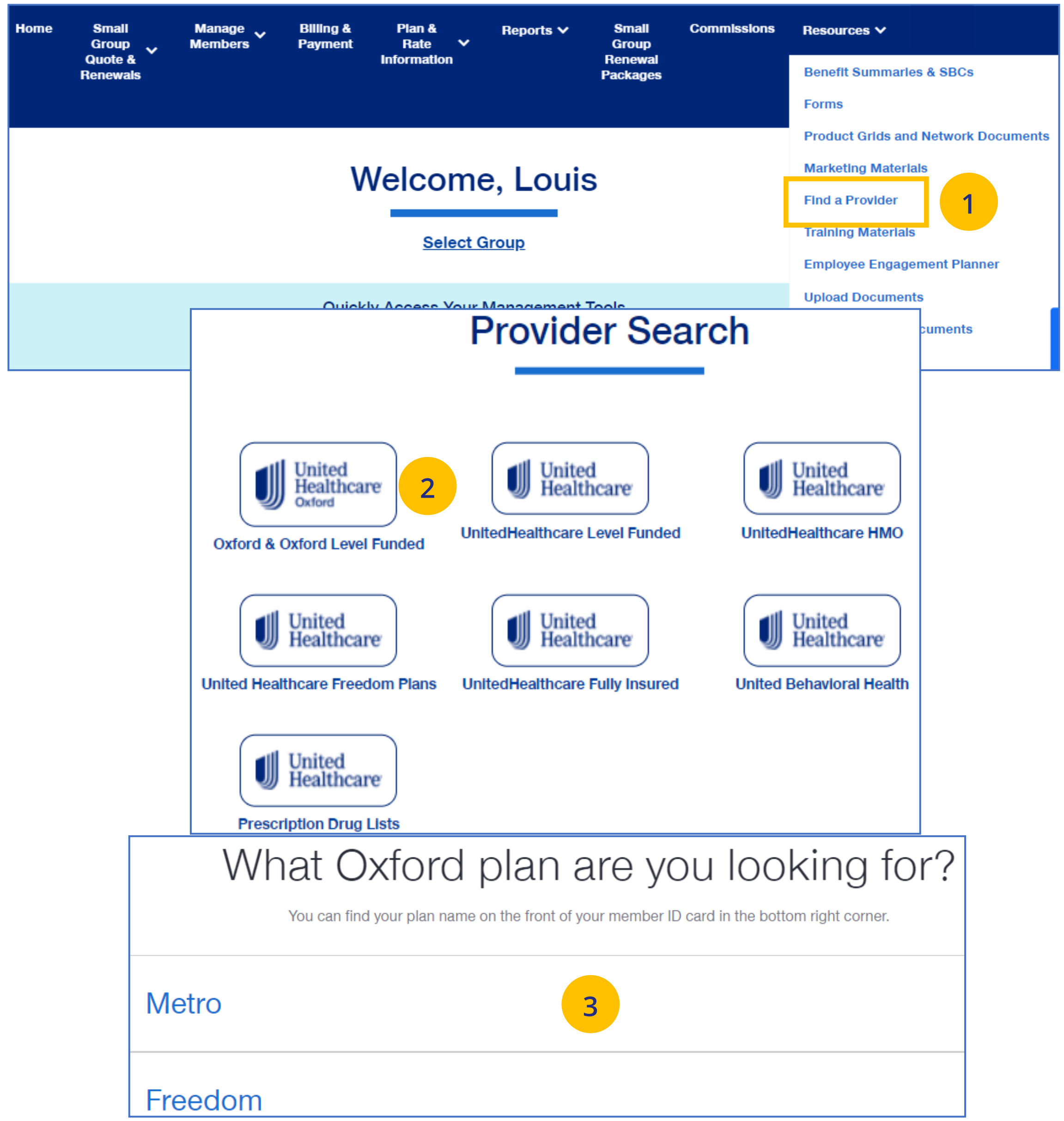
Note: If you have not entered a Group Number previously, you will be asked to search for and find your Group prior to requesting materials.

Note: The screens will vary based on your selection:

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

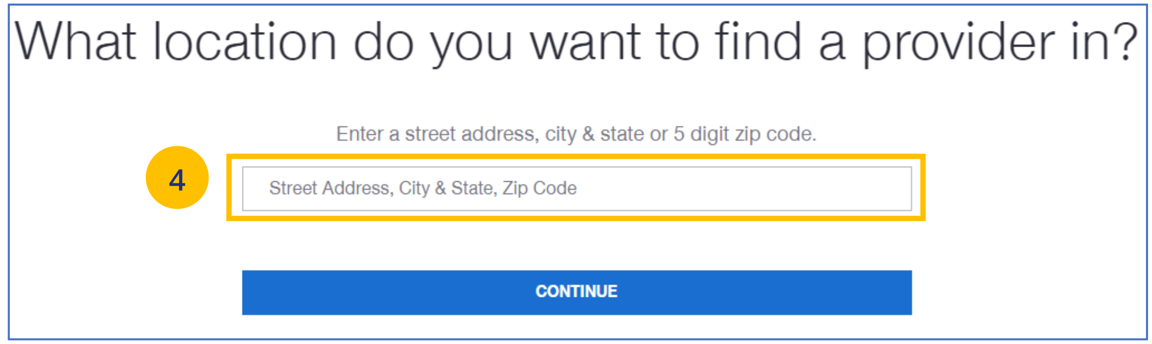
Find a Provider: Oxford

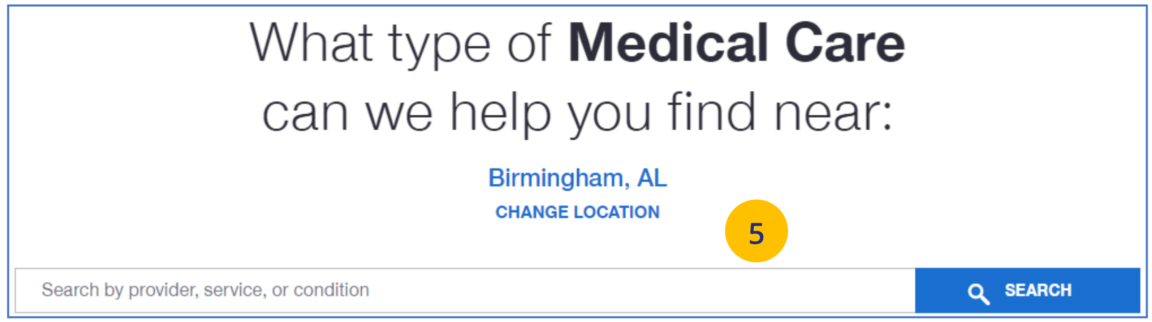
1. Click **Find a Provider**. The **Provider Search** screen displays.
2. Click **Oxford & Oxford level Funded**.
3. Select the Oxford plan you are looking for.

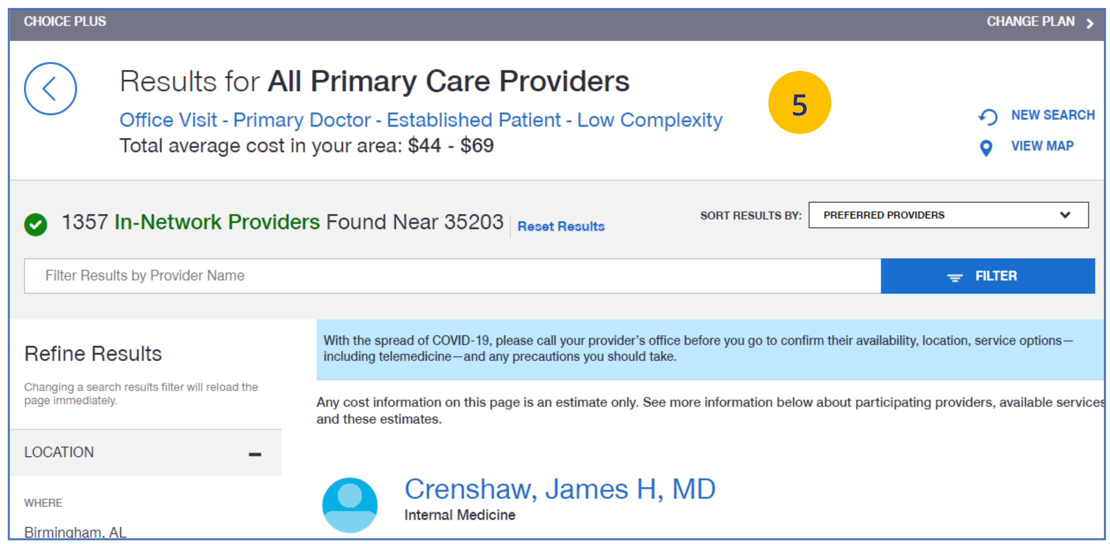


11 | Find a Provider (continued)

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

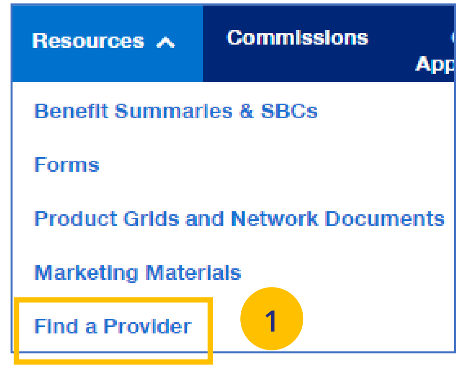


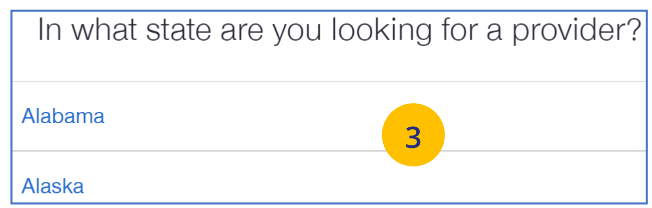


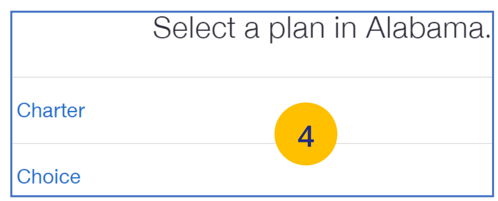


Find A Provider: Level Funded

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







11 | Find a Provider (continued)

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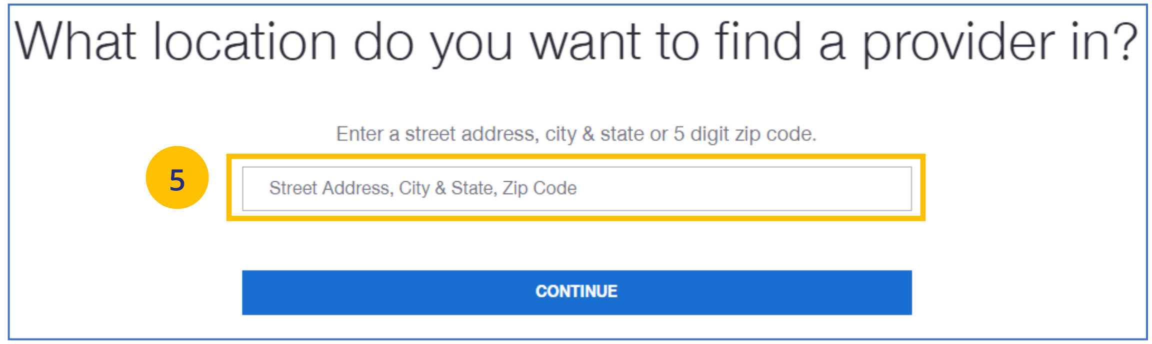
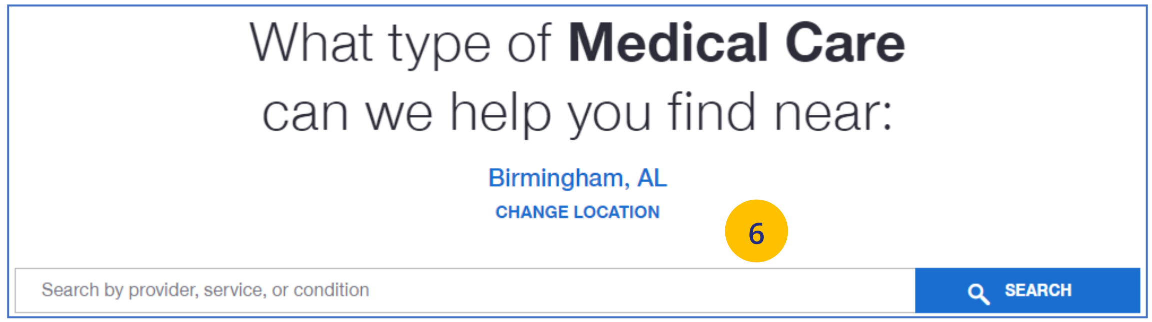
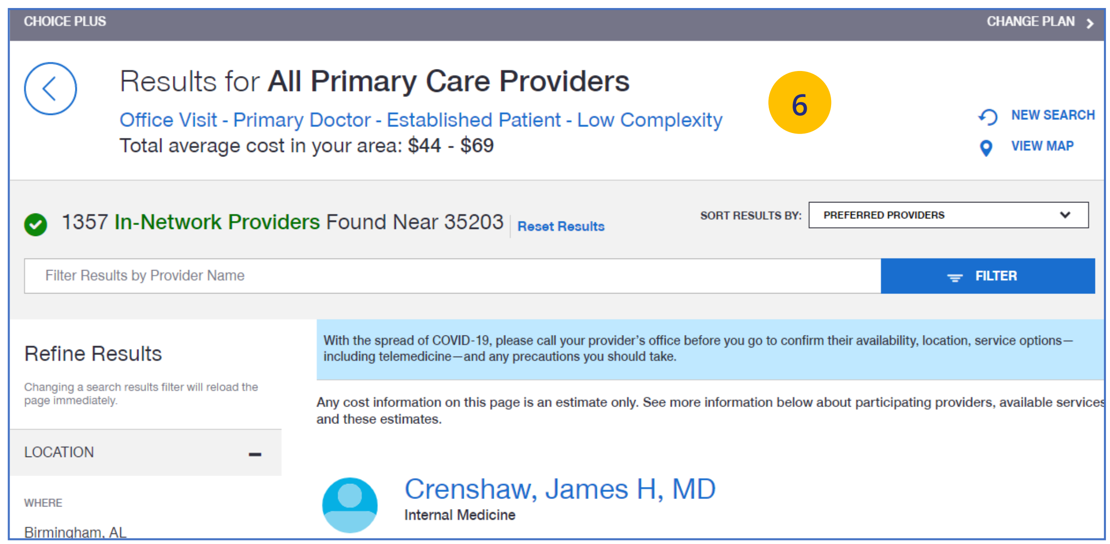
5. Enter the location of your provider and click Continue.

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







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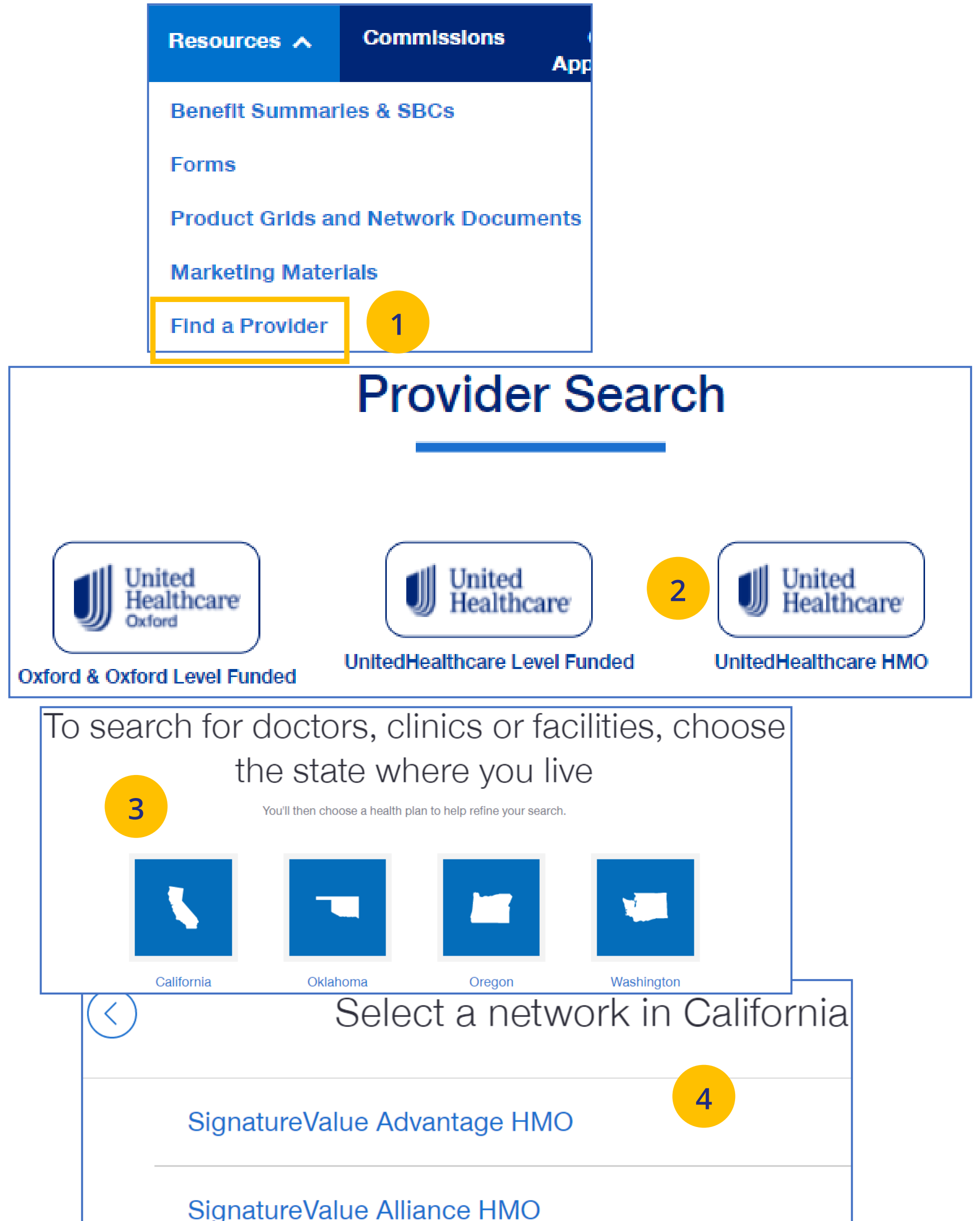
11 | Find a Provider (continued)

Find A Provider: UnitedHealthcare HMO

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



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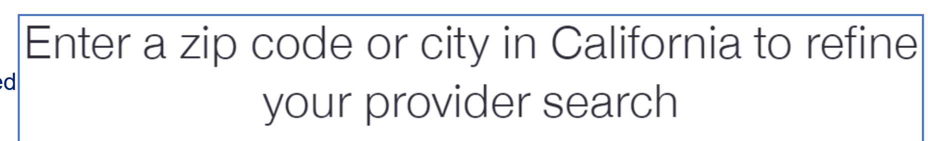
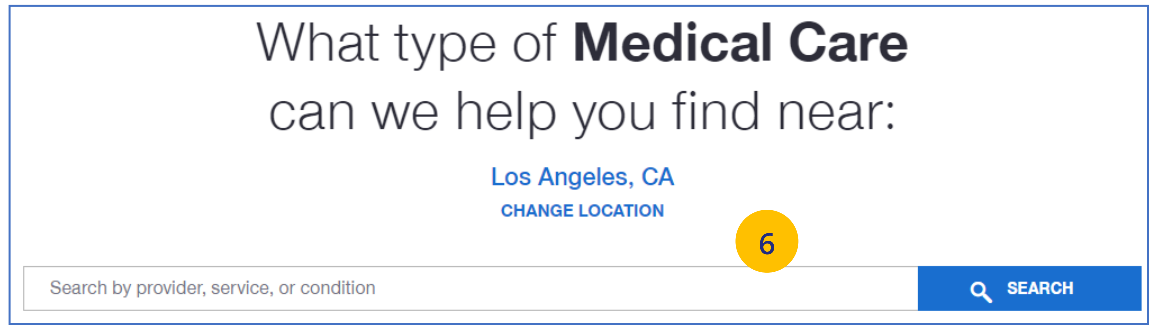
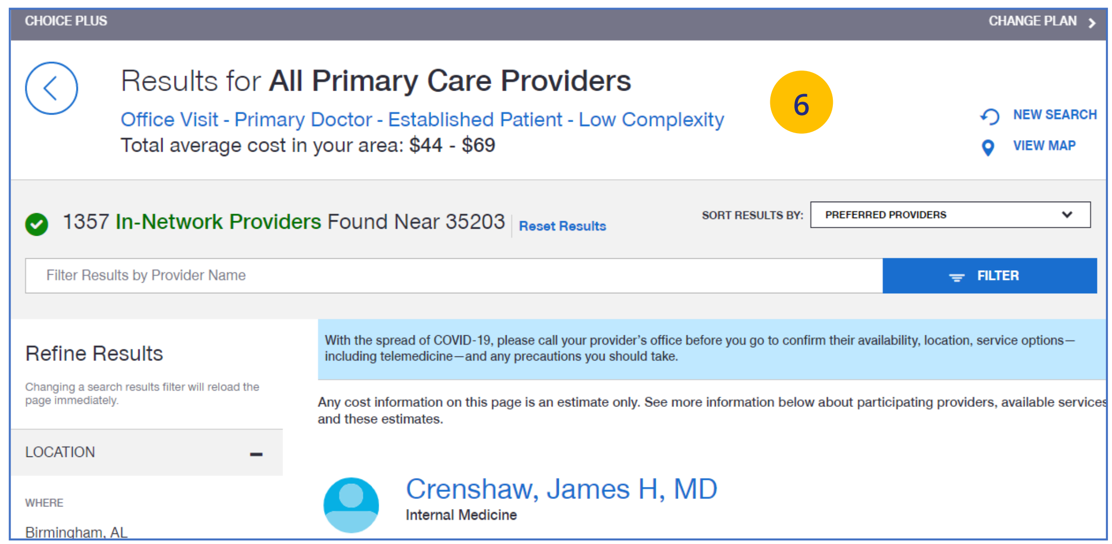
12 | Find a Provider (continued)



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.





11 | Find a Provider (continued)

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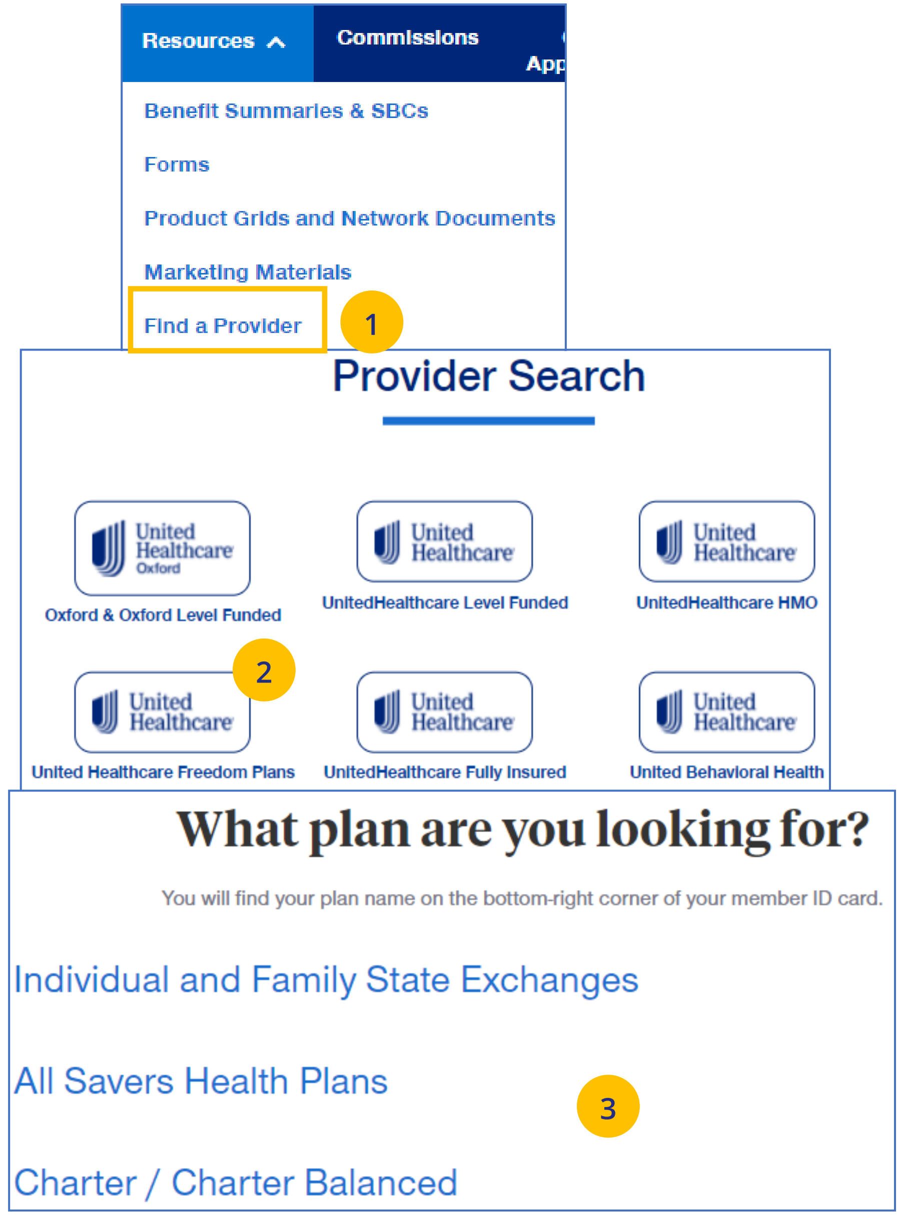
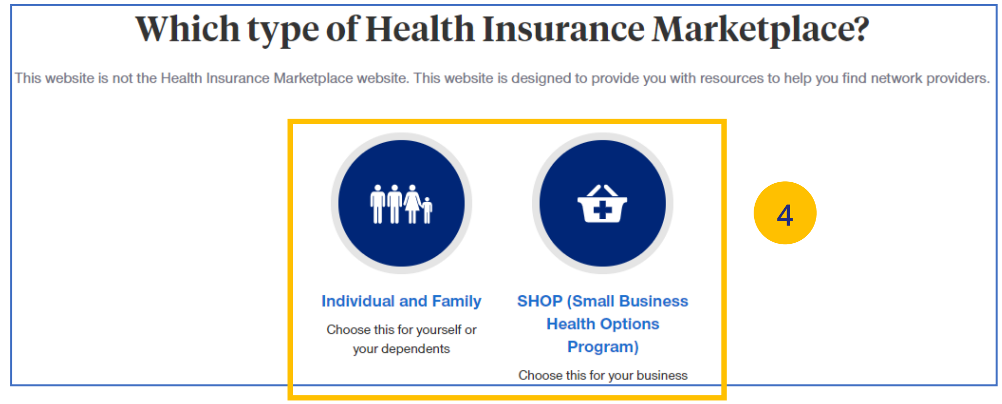
Find A Provider: UnitedHealthcare Freedom Plans

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



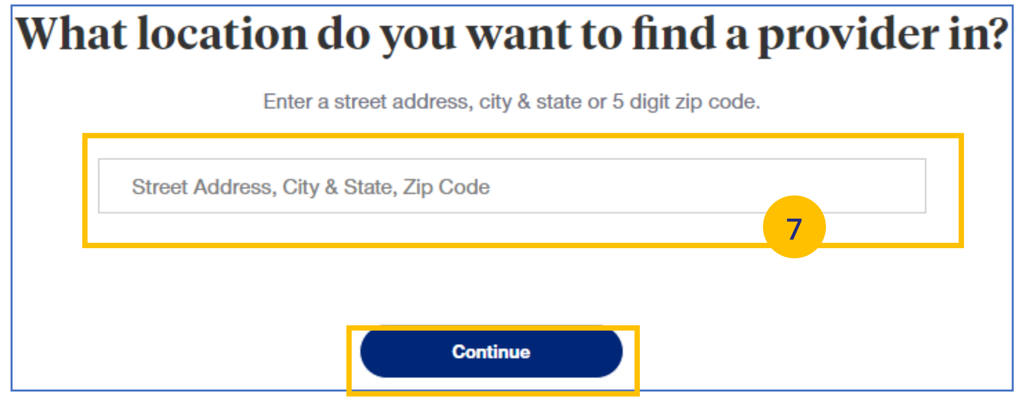
11 | Find a Provider (continued)

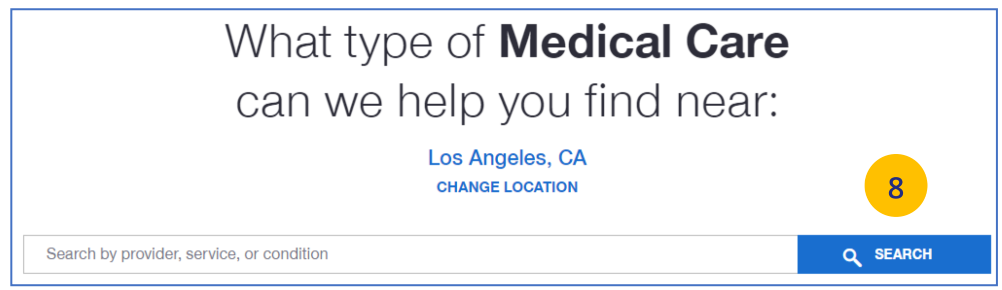
4. Select **Individual and Family** or **SHOP (Small Business Health Plan Options Program)**.
5. Select the specific state you need.
6. Select the network in your state.



11 | Find a Provider (continued)

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





11 | Find a Provider (continued)

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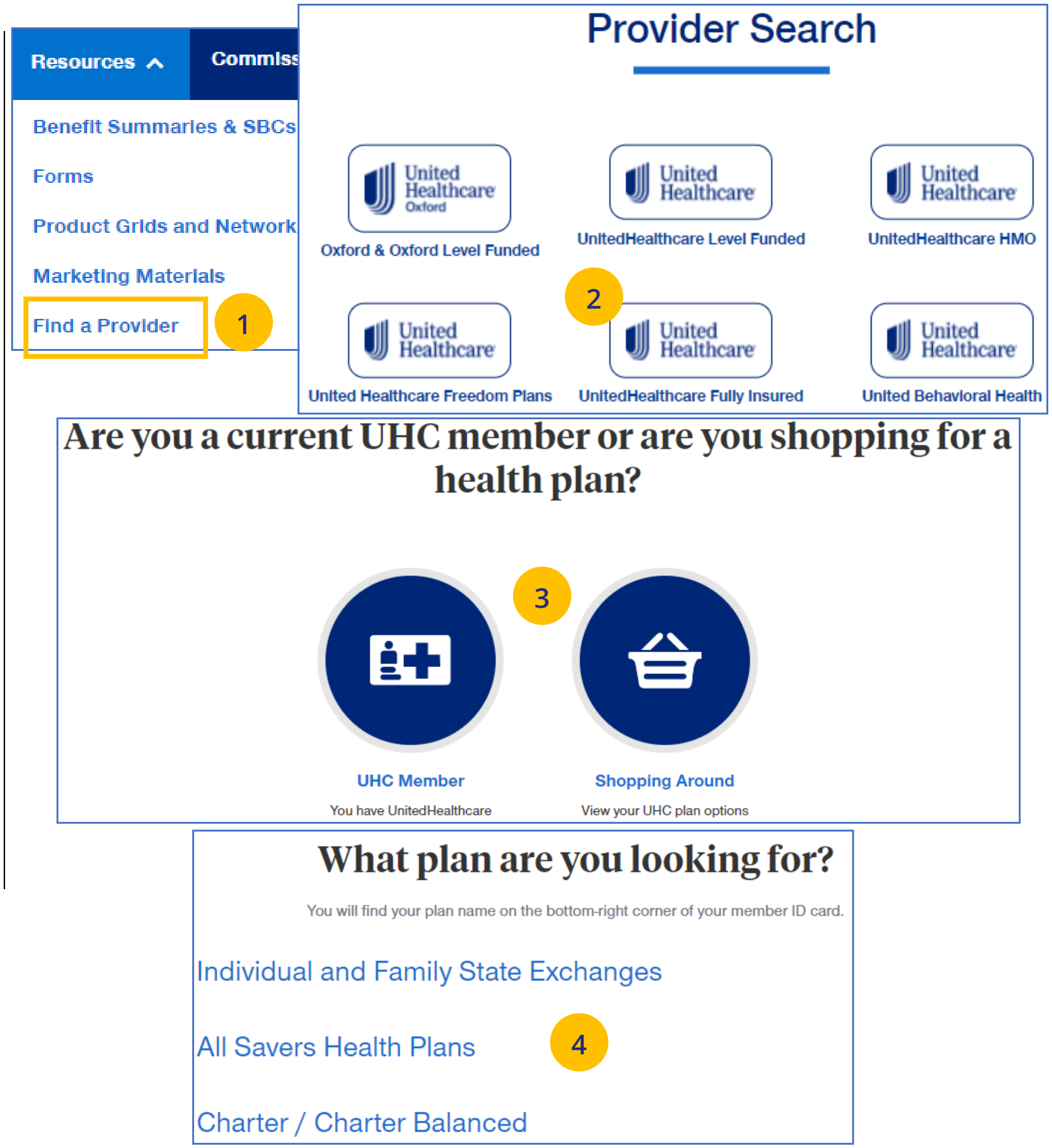
Find A Provider: UnitedHealthcare Fully Insured

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



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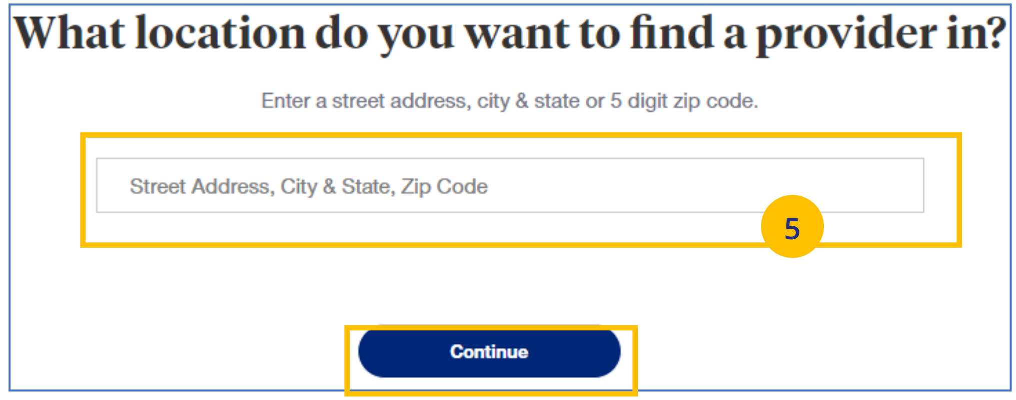
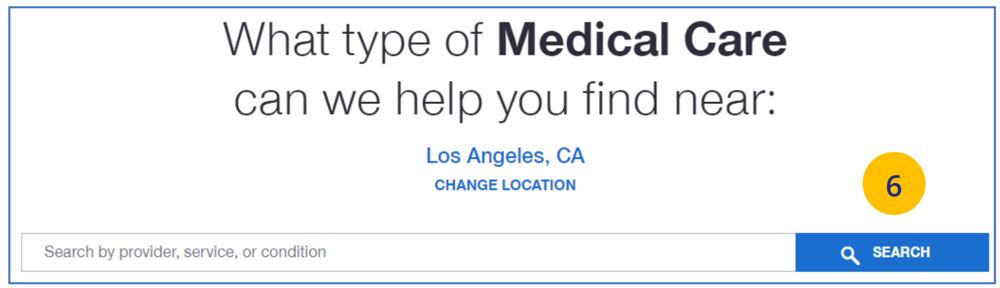
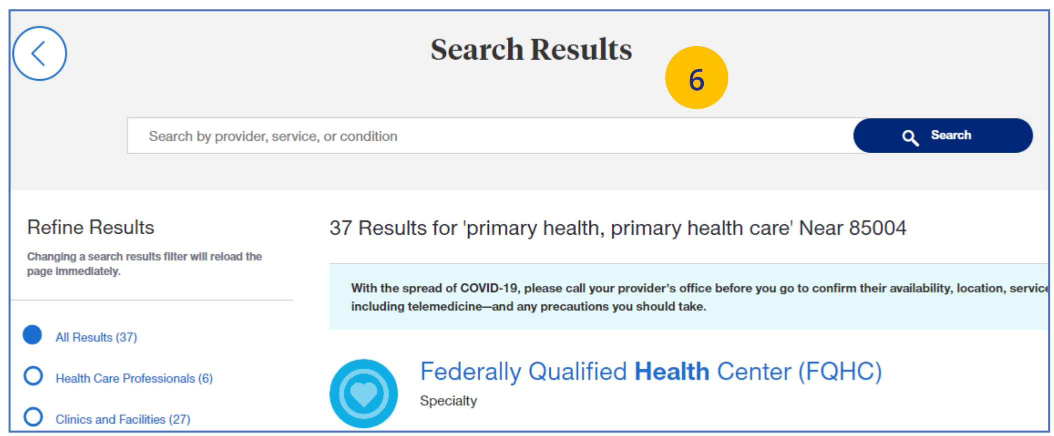
11 | Find a Provider (continued)

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

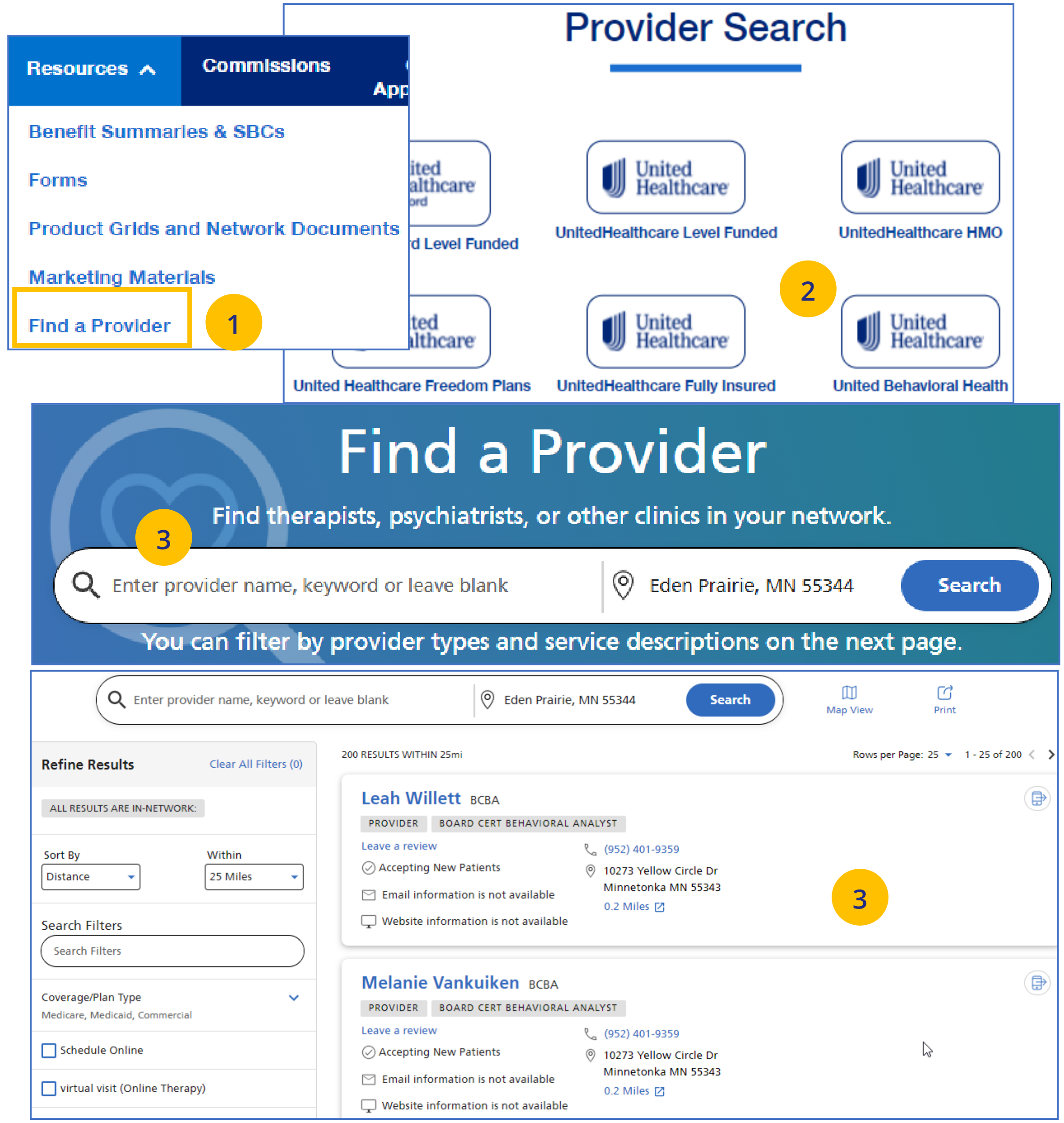






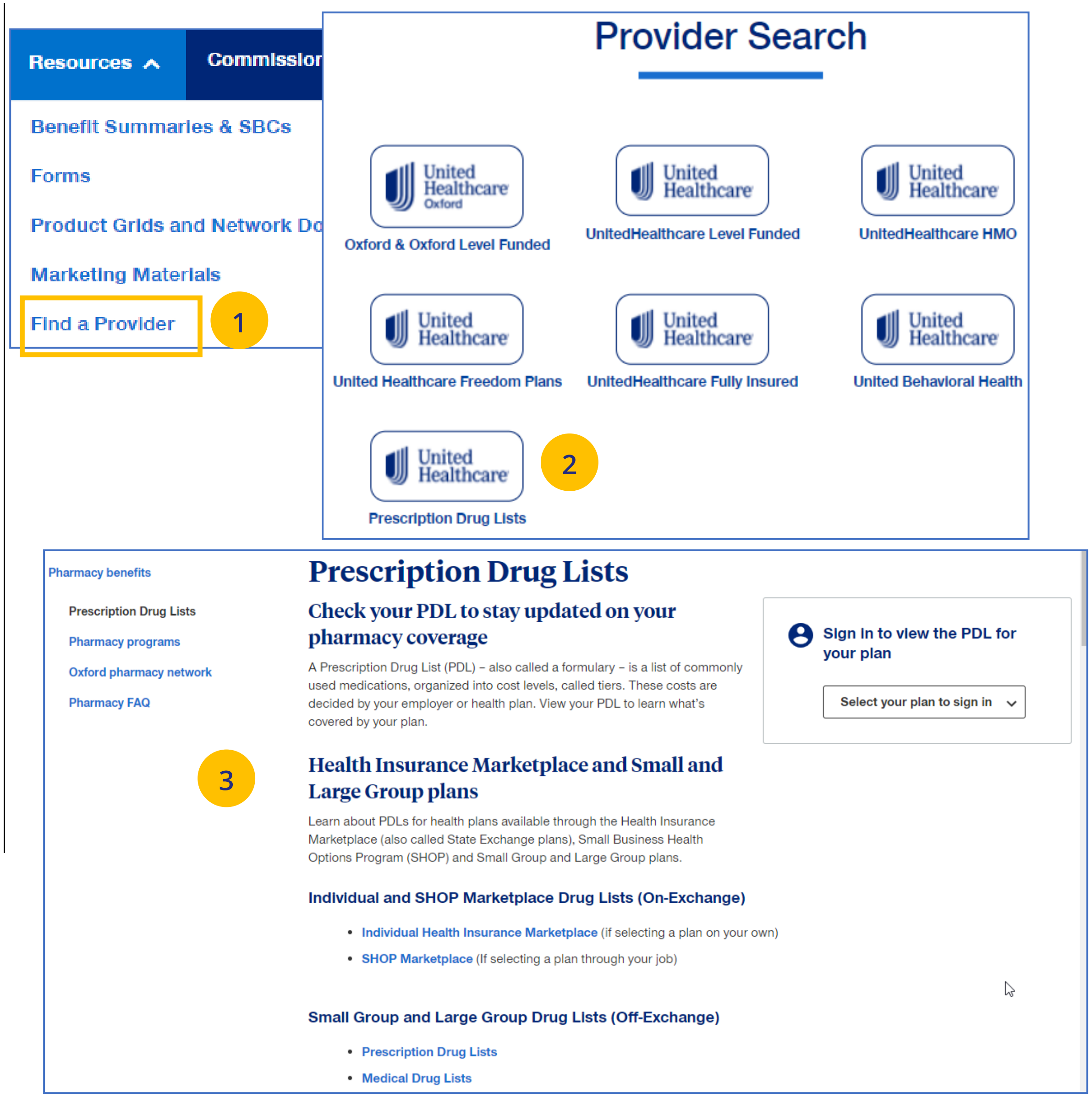
Find A Provider: United Behavioral Health

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.



Find A Provider: Prescription Drug Lists

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



11 | Training Materials

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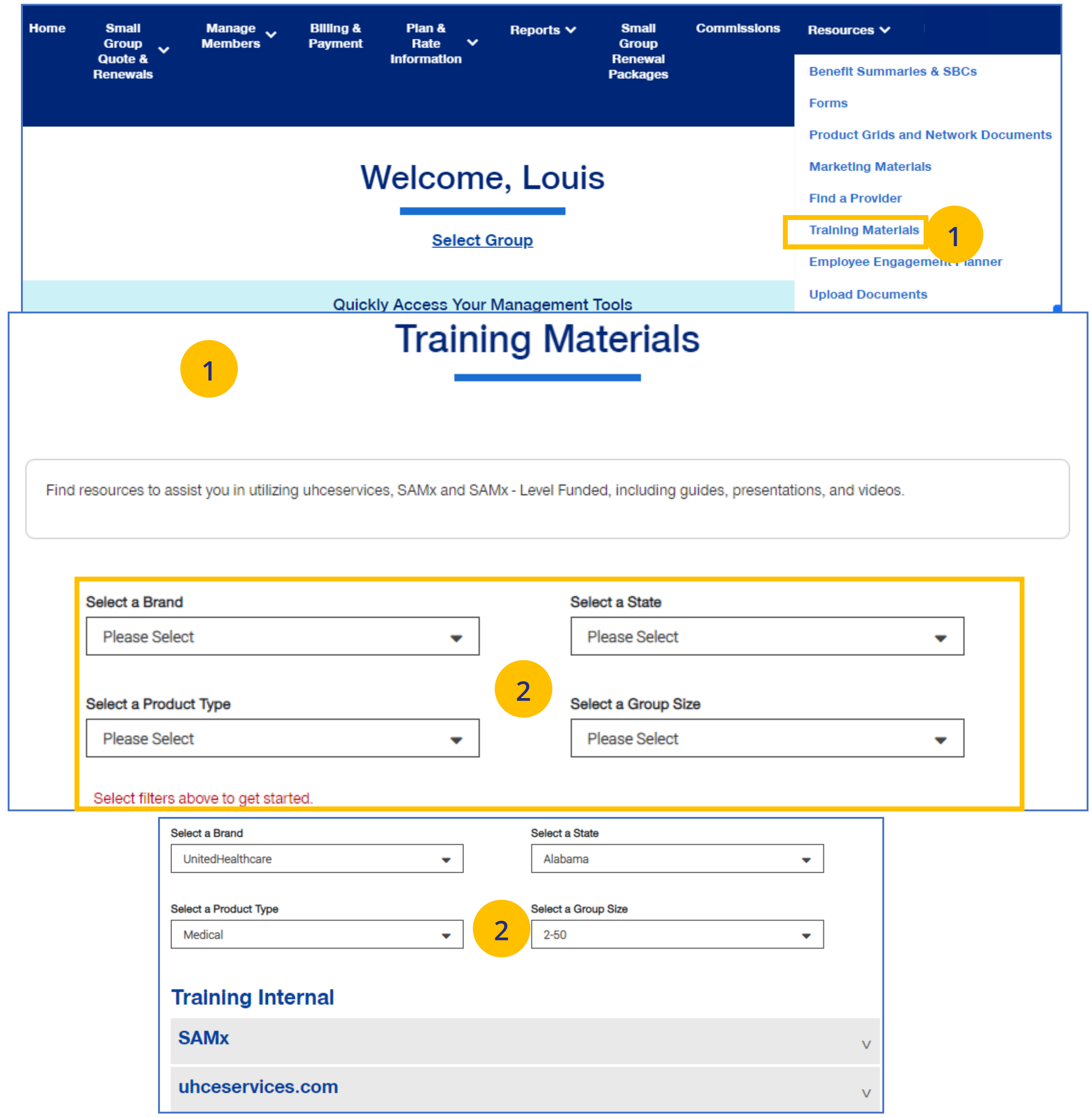
The **Training Materials** link allows you to access training resources, including guides, presentations and videos.

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



11 | Employee Engagement Planner

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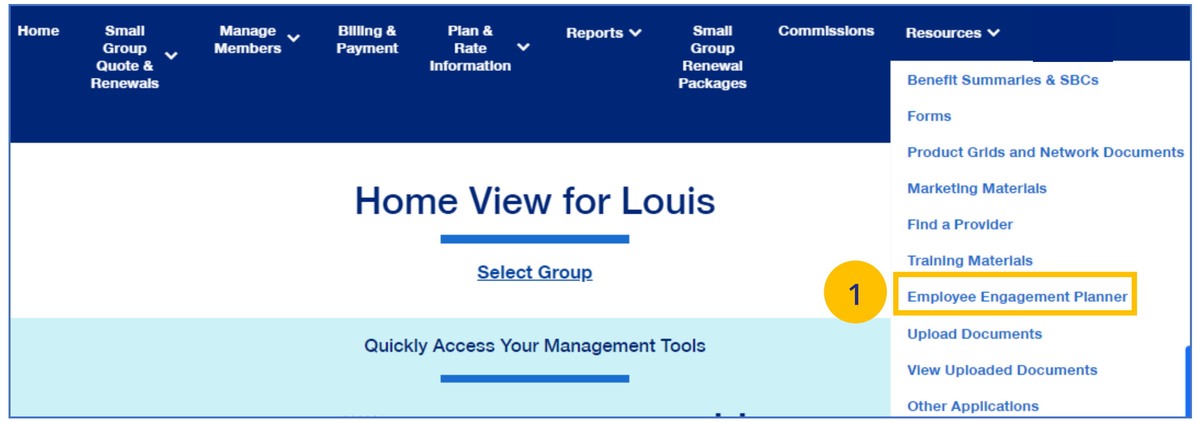
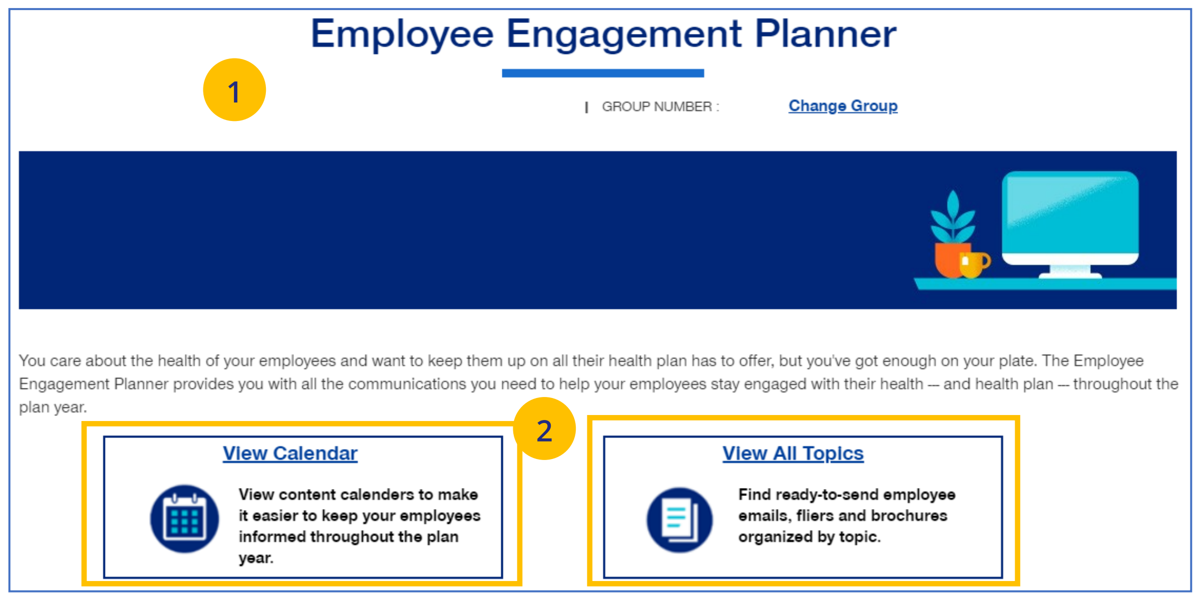
The **Employee Engagement Planner** allows you to view a calendar and documents that can be sent to employees to keep them information.

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

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





11 | Employee Engagement Planner (continued)

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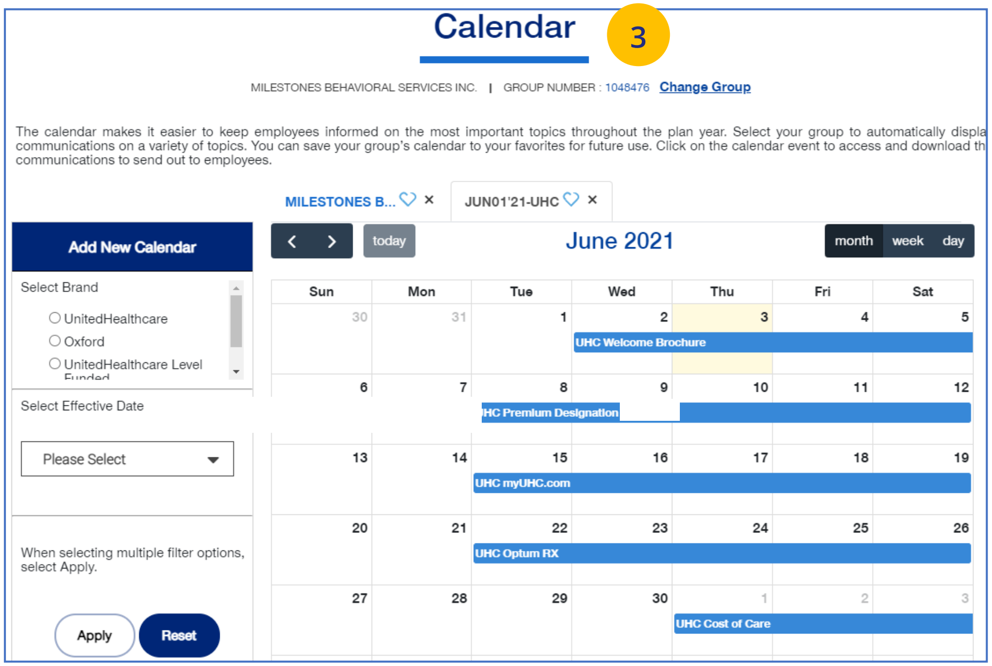
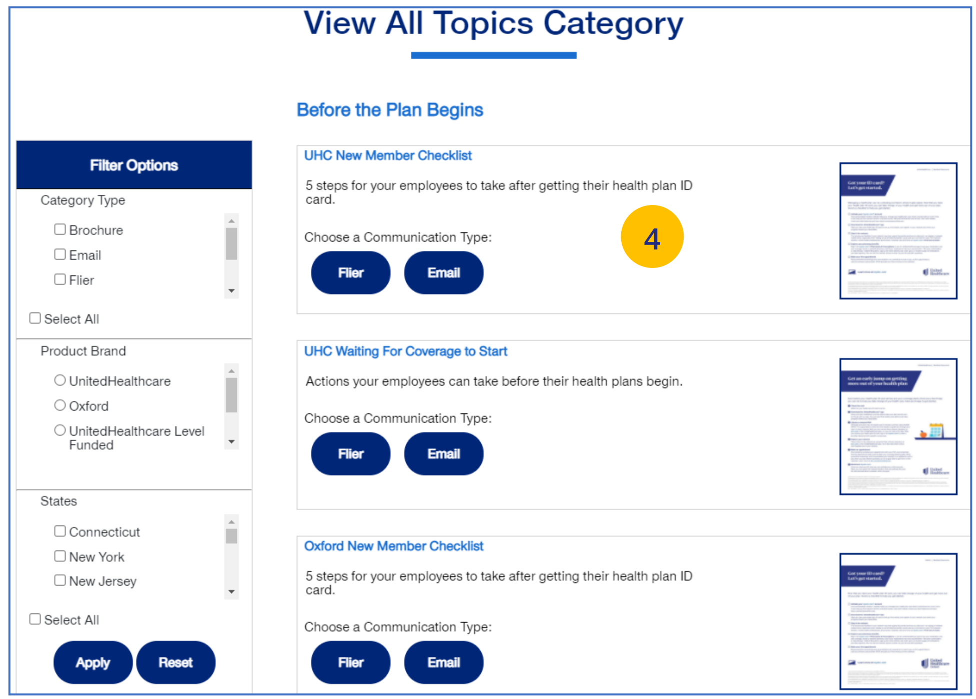
3. **View Calendar** – Select a group to see documents based on group brand and effective date. Important communications that can be downloaded and sent to employees.



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

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



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11 | Upload Documents

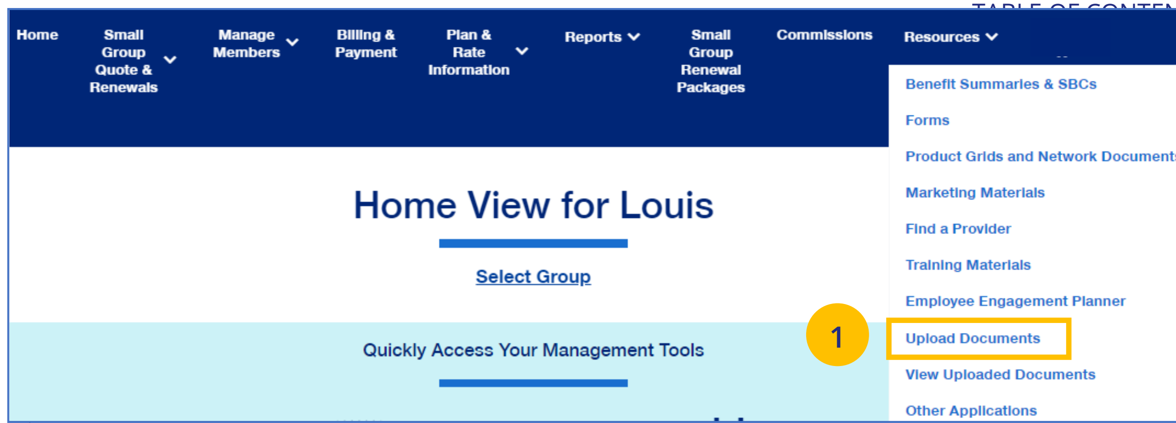
The **Upload Documents** tab allows you to select and upload a specific document. **This only applies if you have permission to upload documents.**

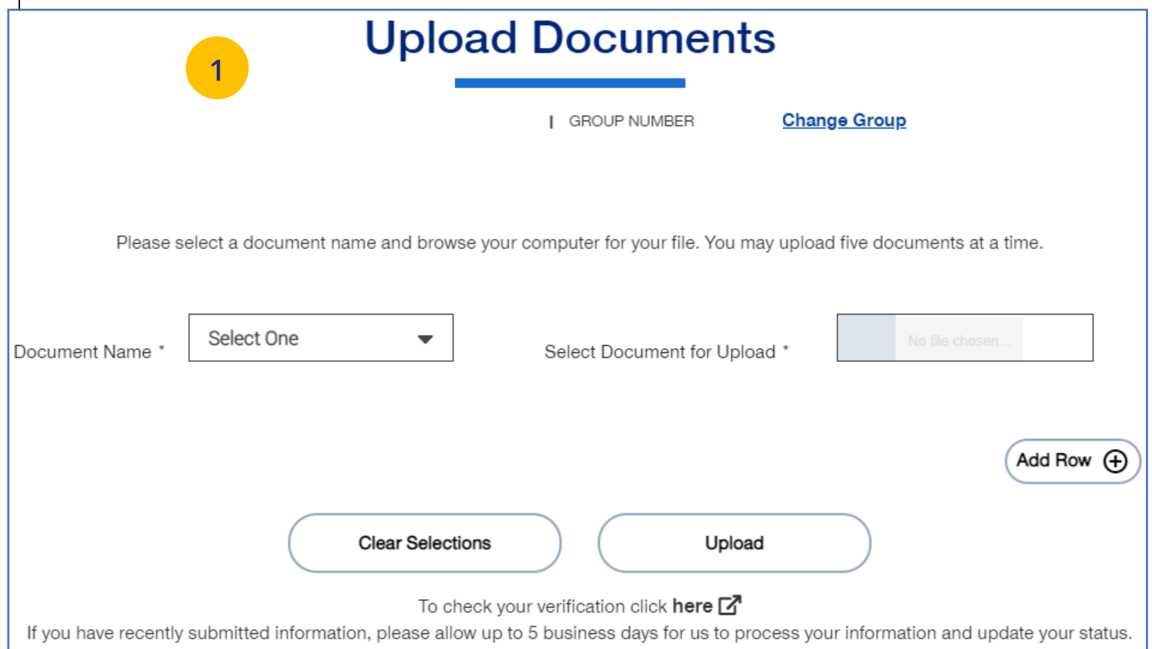
Note: Access to **Upload Documents** is available only to users with the following roles:

- Internal Portal Admin
- Internal Risk Management
- Internal SAMx Admin
- Internal Service
- Internal Underwriting
- Internal Sales
- Employer Lead
- Employer User
- Broker Lead with User Maintenance
- Standard Broker without Commissions
- Broker View Only
- Standard Broker with Commissions

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

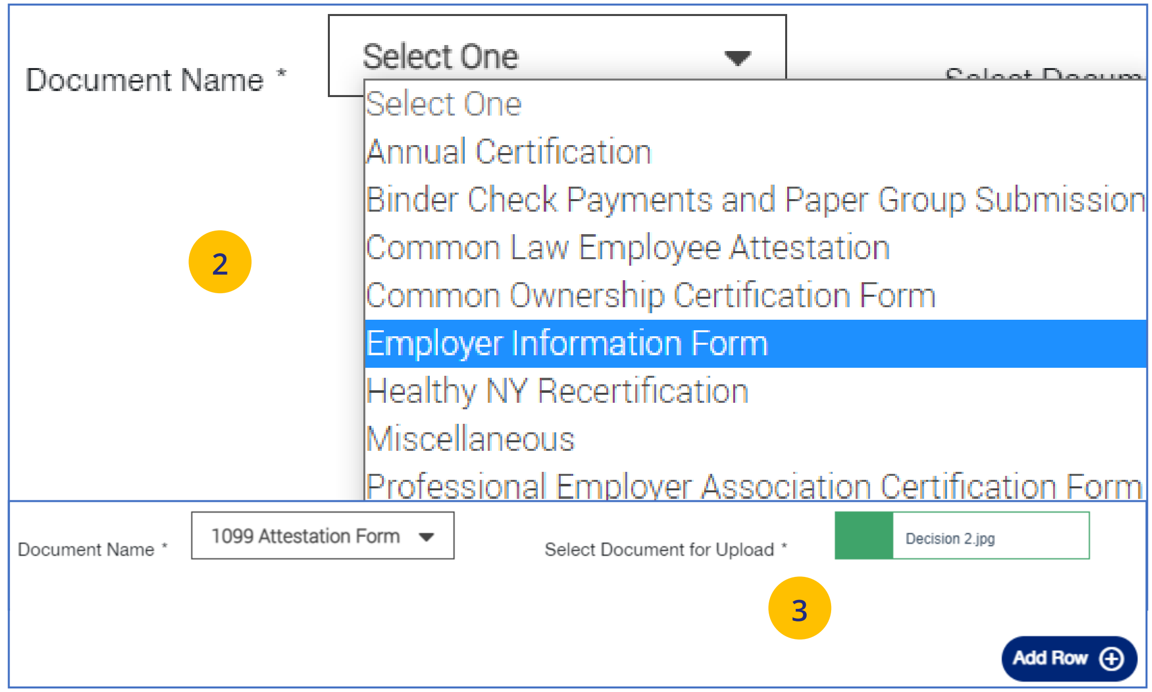
1. Click the **Upload Documents** link. The **Upload Documents** screen displays.

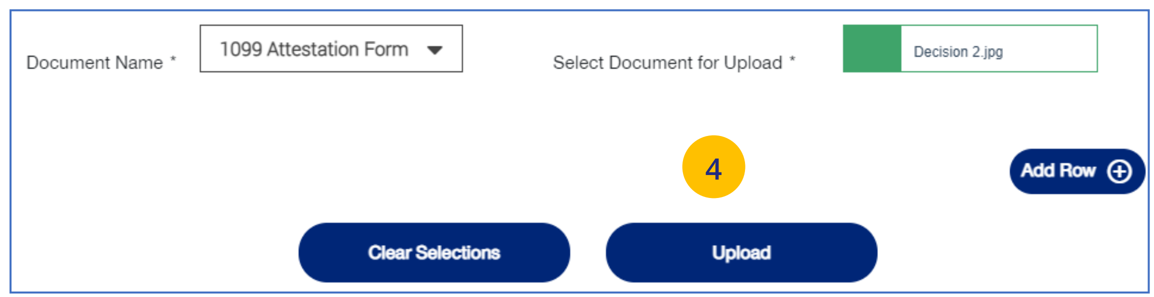


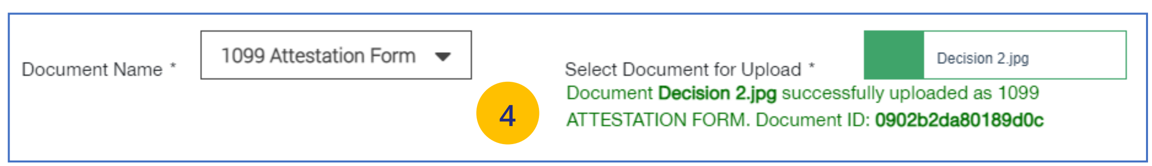


11 | Upload Documents (continued)

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







11 | View Uploaded Documents

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

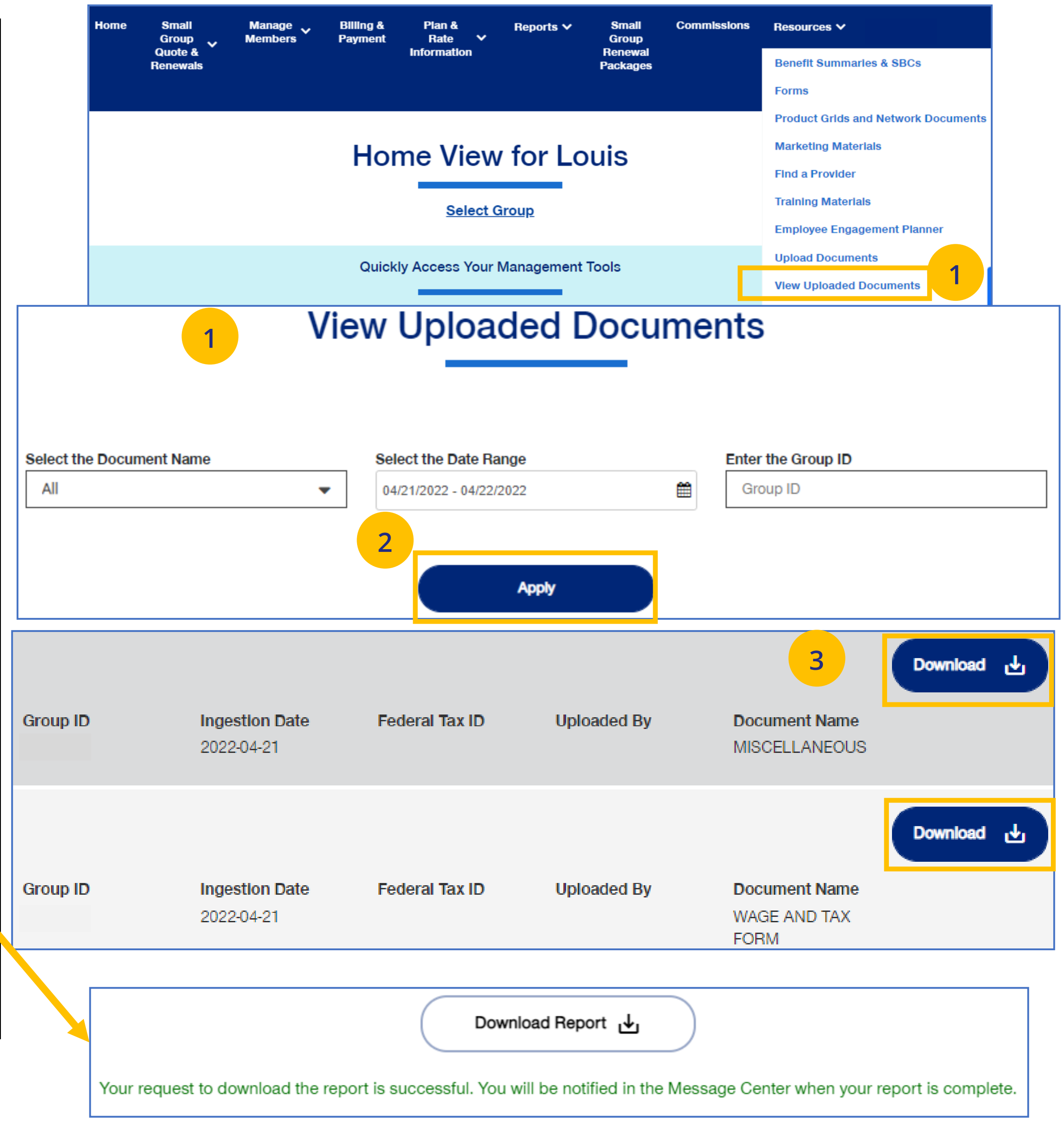
Note: If you have not entered a Group Number previously, you will be asked to search for and find your Group prior to requesting documents.

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

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

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

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



11 | Other Applications

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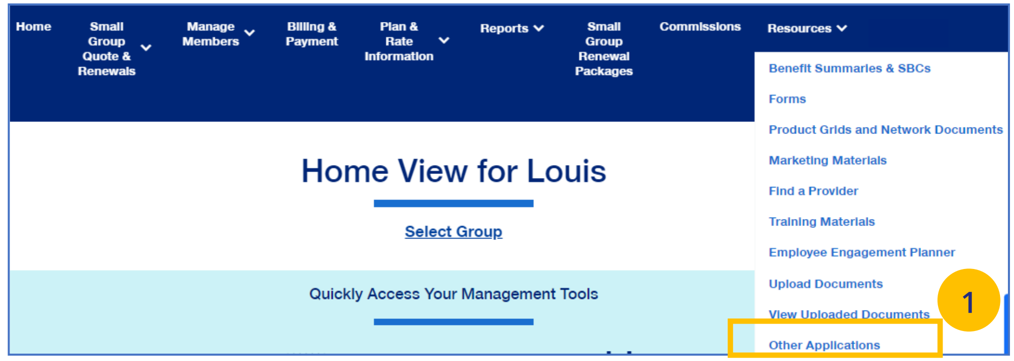
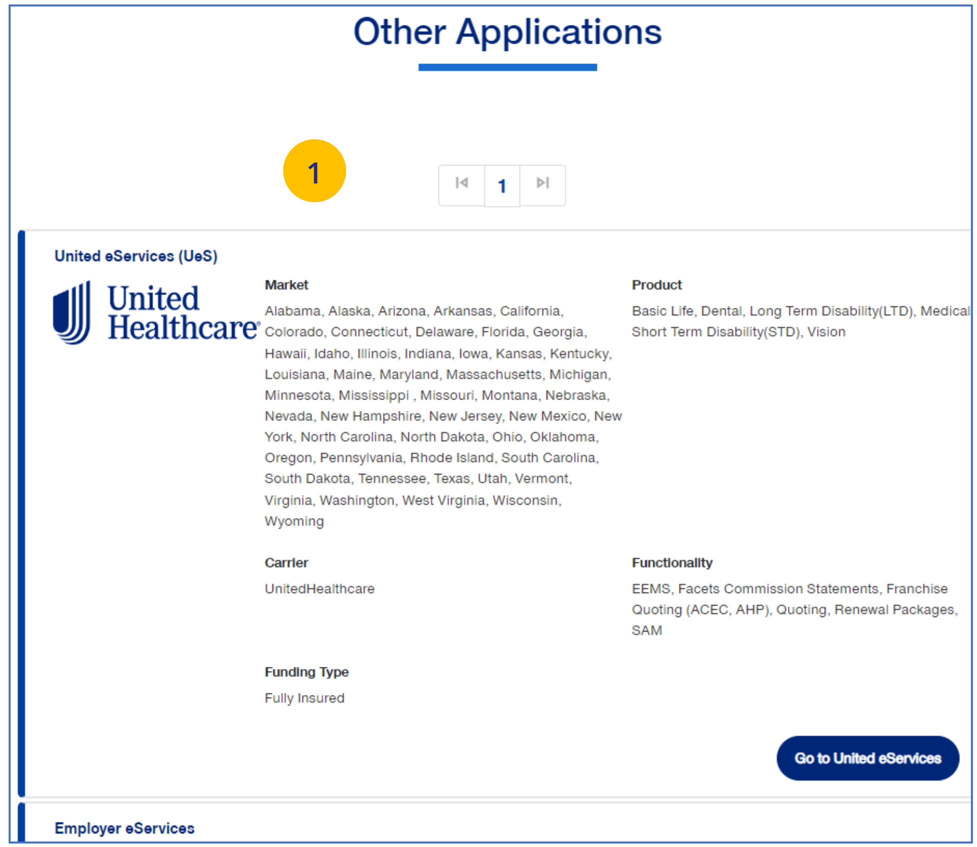
The **Other Applications** tab provides direct links to United eServices (UeS) and Employer eServices (EeS).

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





12 | Commissions

The **Commissions** tab is used to search for and display a broker's commissions.

1. Click the **Commissions** tab. The **Commissions** screen displays.

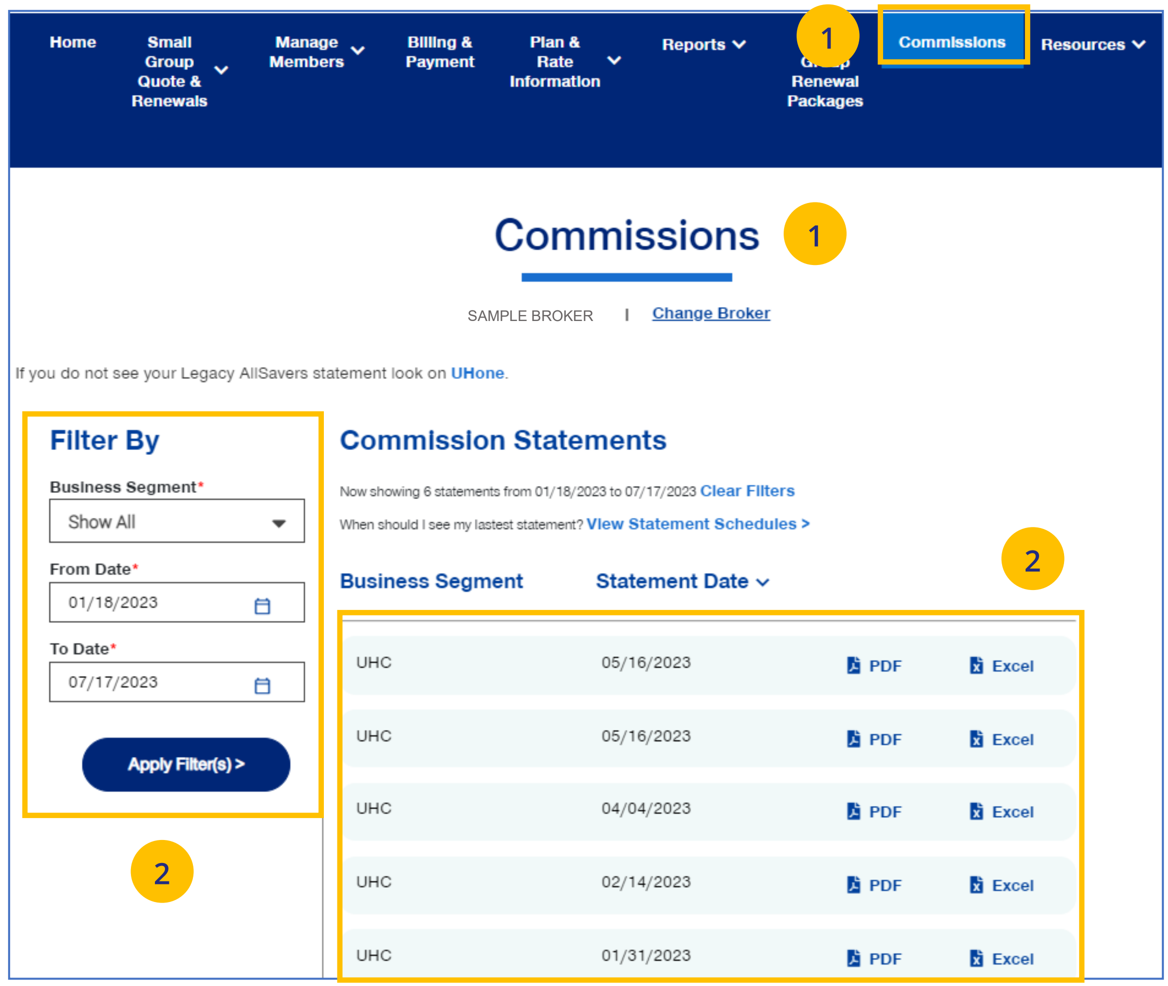
   Note: For Internal Sales roles, you will have to enter the Broker's PCIS ID to access the **Commissions** screen.

2. You have the following options:

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

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

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



Appendix: Broker Roles and Permissions

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Broker Roles and Permissions

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

Appendix: Employer Roles and Permissions

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

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