



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

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.

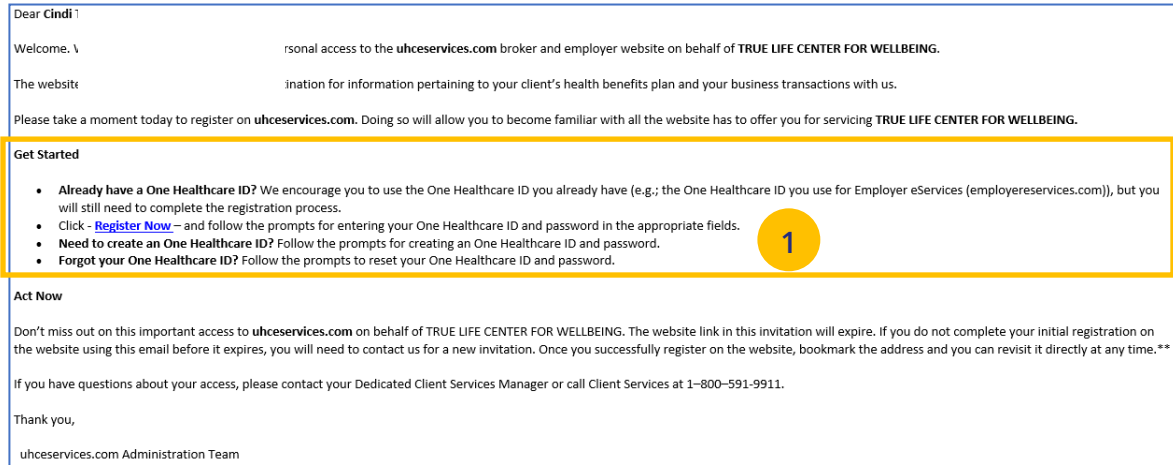
This only applies to Brokers and General Agents. Separate guides are available for Employers and Internal Sales & Account Management.

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

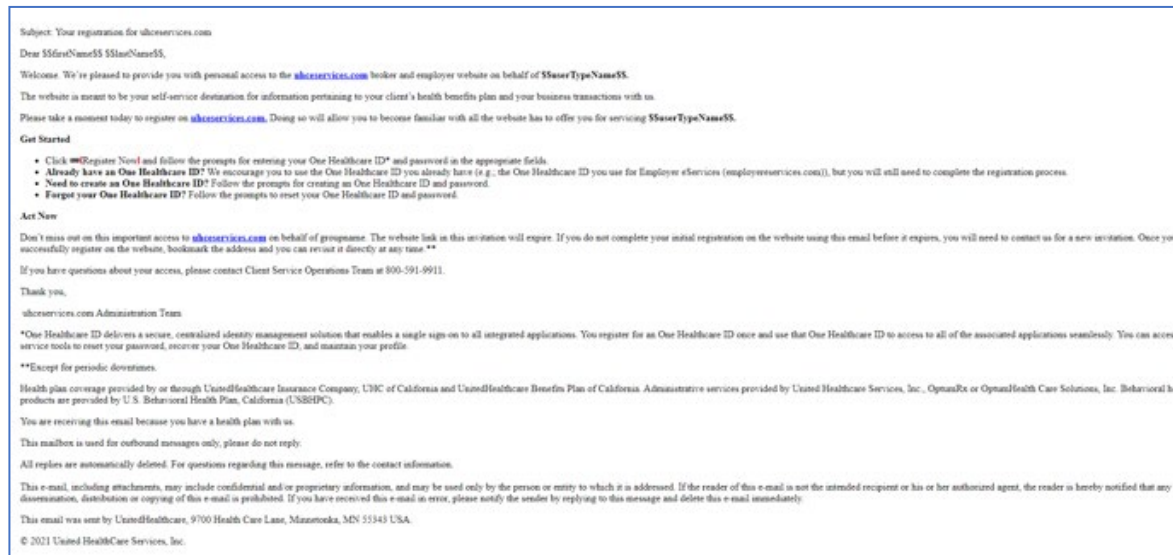
1. Email invitation
2. Login re-direct from United eServices

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.



Email Invitation to Brokers and Employers (Cirrus)



Email Invitation to Brokers and Employers (UnitedHealthcare HMO)




1 | How to Register: Email Invitation (continued)

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

Create One Healthcare ID

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

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

Profile Information

First name

Last name

Year of birth

2

?




1 | How to Register: Email Invitation (continued)

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


Sign In Information

Your email address


Create One Healthcare ID

Your One Healthcare ID must have:

- 6 to 50 characters
- At least one letter 
- No spaces
- No letters with accents
- None of these Symbols: % + " & [\] ^ ' { | } < > # , / ; () : * = ~


Create password

Your password must have:

- Between 8 and 100 characters
- At least 1 uppercase letter
- At least 1 lowercase letter
- At least 1 number
- No spaces and no & symbol

Type password again



1 | How to Register: Email Invitation (continued)

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

Security Questions and Answers 4

Security question 1

Security answer 1

Security question 2

Security answer 2

Security question 3

Security answer 3

You must agree to the [Terms of Use](#) and [Website Privacy Policy](#) to use the One Healthcare ID service. If you do not agree, click Cancel and do not use any aspect of the One Healthcare ID service.

5



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

Next Step: Verify Your Email Address

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

10-digit activation code

6

Still waiting for your activation code? [Resend email](#) or [update email address](#)

If you don't see it, check your junk or spam folders. You may need to resend the message or add our address to your approved senders.

If you'd like assistance, contact support at 1(855)819-5909 or optumsupport@optum.com

Confirm your One Healthcare ID email address

OH One Healthcare ID-NoReply <noreply@onehealthcareid.com>
To Chintakayala Bhavani Thu 3/25/20
Retention Policy UHGInbox (90 days) Expires 6/23/2021

Reply Reply All Forward

One Healthcare ID

Your One Healthcare ID

 6

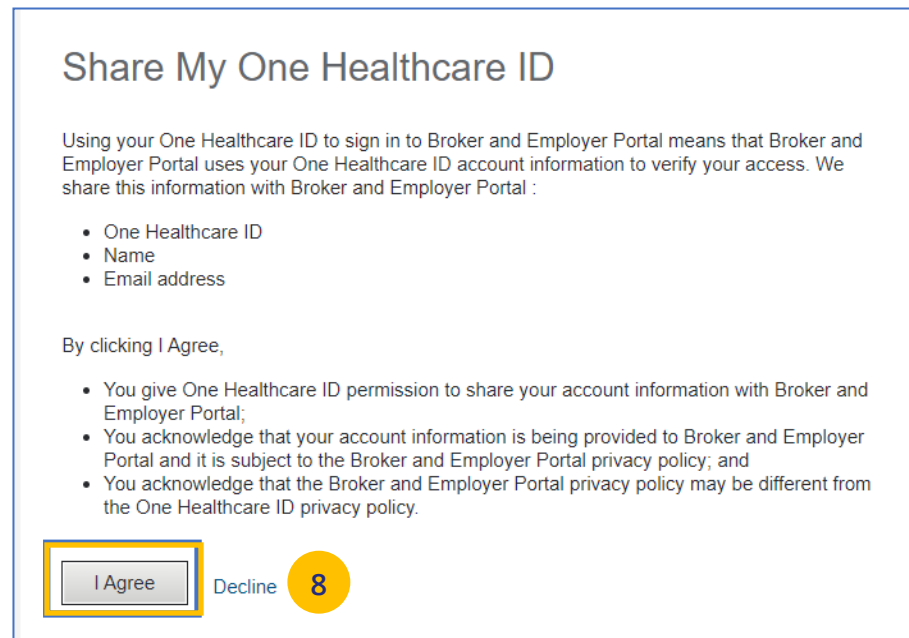
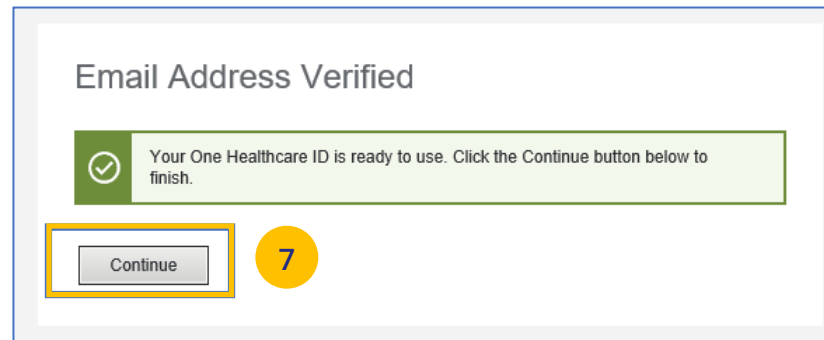
If you prefer, copy this 10-digit code 1571003356 and paste it into the box for the activation code on the Activate Your One Healthcare ID page.

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



1 | How to Register: Email Invitation (continued)

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



1 | How to Register: Email Invitation (continued)

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

Attestation

Please click each document link to enable the checkbox.

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

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

Click each link



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

What is happening?

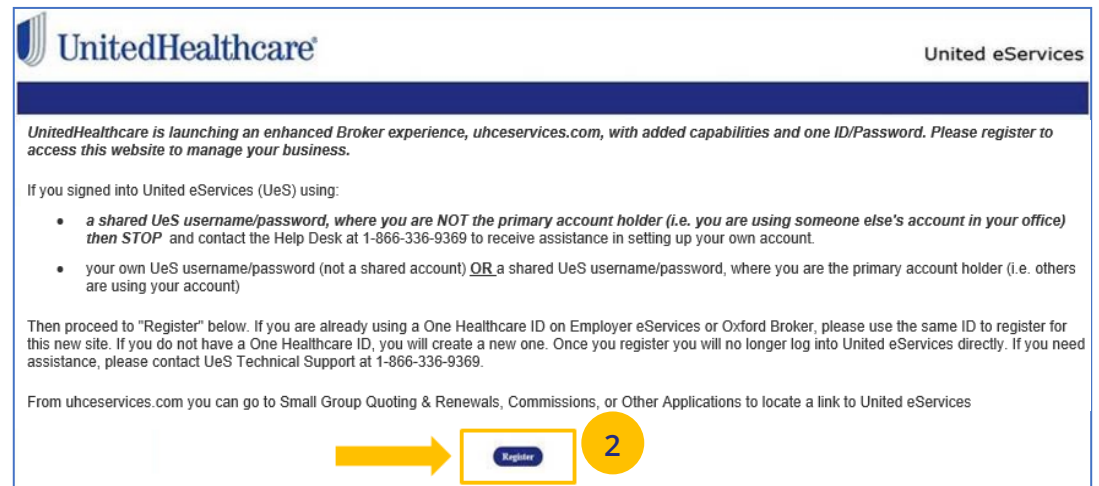
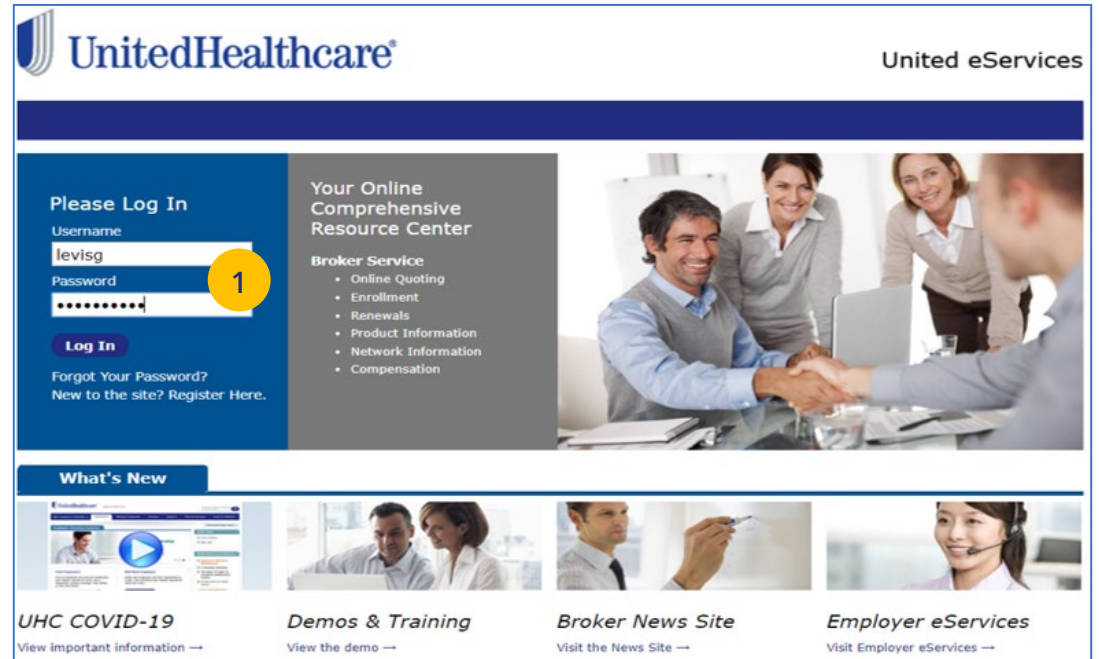
- Brokers will be transitioned from United eServices (UeS) to uhceservices by market in a phased approach. You will receive a message upon logging into United eServices, directing you to register for uhceservices.
- After registering, you will then use uhceservices as your Broker site and access UeS 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:
 - o Enter the 10-digit activation code to verify your email address and click **Next, or**
 - o You can click the activation link in the email.

Create One Healthcare ID

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

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

Profile Information

First name

Last name

Year of birth
 ?

Sign In Information

Your email address

Create One Healthcare ID
 ?

Your One Healthcare ID must have:
Ⓞ 6 to 50 characters

Next Step: Verify Your Email Address

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

10-digit activation code
 4

Still waiting for your activation code? [Resend email](#) or [update email address](#)

If you don't see it, check your junk or spam folders. You may need to resend the message or add our address to your approved senders.

If you'd like assistance, contact support at 1(855)819-5909 or optumsupport@optum.com

Confirm your One Healthcare ID email address

OH One Healthcare ID-NoReply <noreply@onehealthcareid.com>

[Reply](#) [Reply All](#) [Forward](#)
 To: Chintakayala Bhavani
 Retention Policy: UHGIInbox (90 days) Expires: 6/23/2021 Thu 3/25/20

Your One Healthcare ID

4

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


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



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

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

Email Address Verified

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

5

Share My One Healthcare ID

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

- One Healthcare ID
- Name
- Email address

By clicking I Agree,

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

6

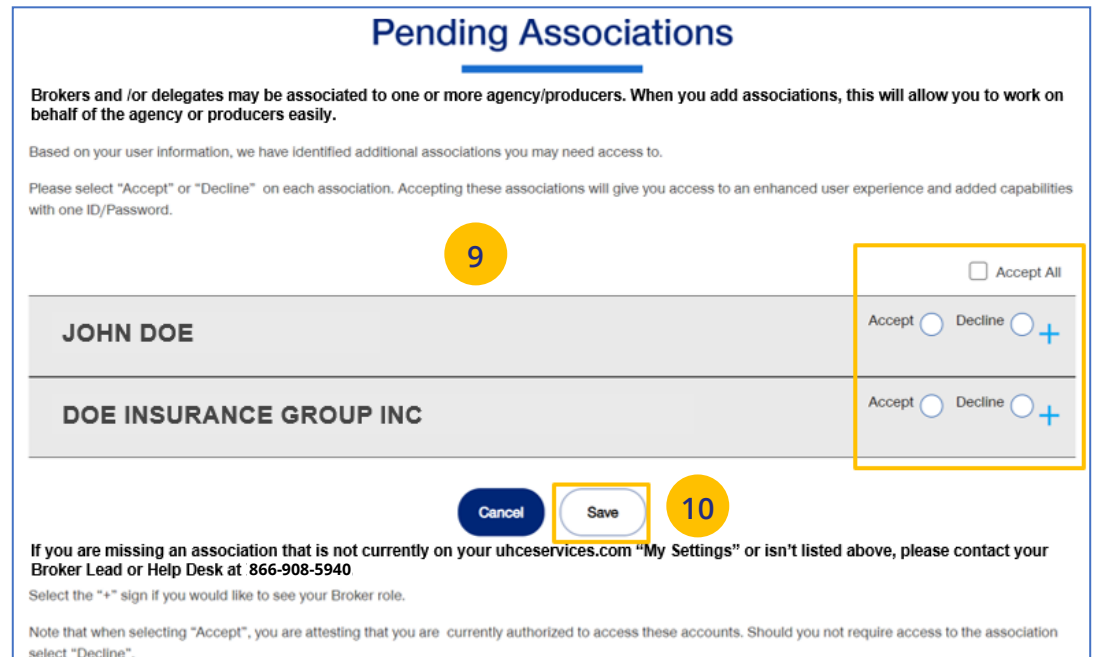
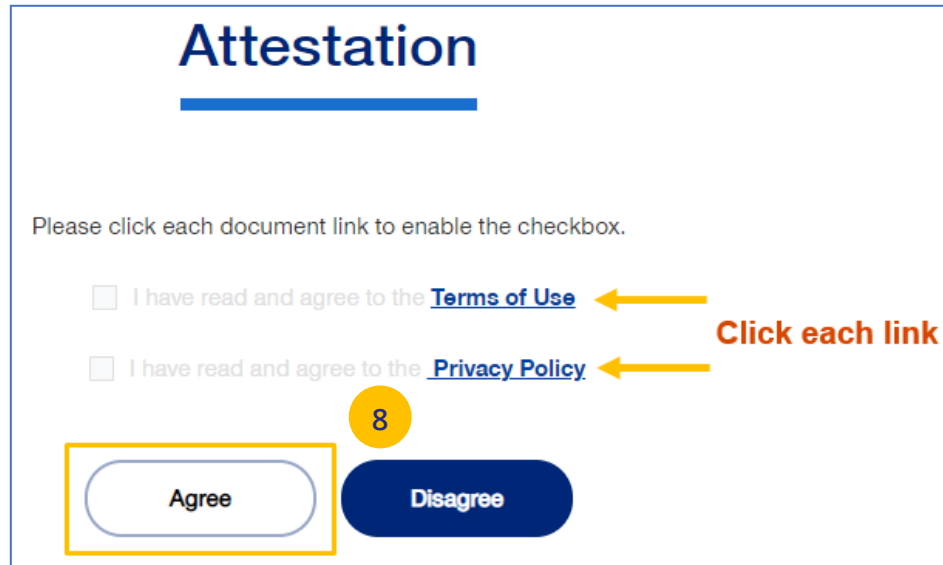


- Follow the Attestation process by clicking each link (Terms of Use and Privacy Policy). Then click **Agree**. The **Pending Associations** screen displays.

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

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

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



1 | Access and Log In with OneHealthcare ID

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.

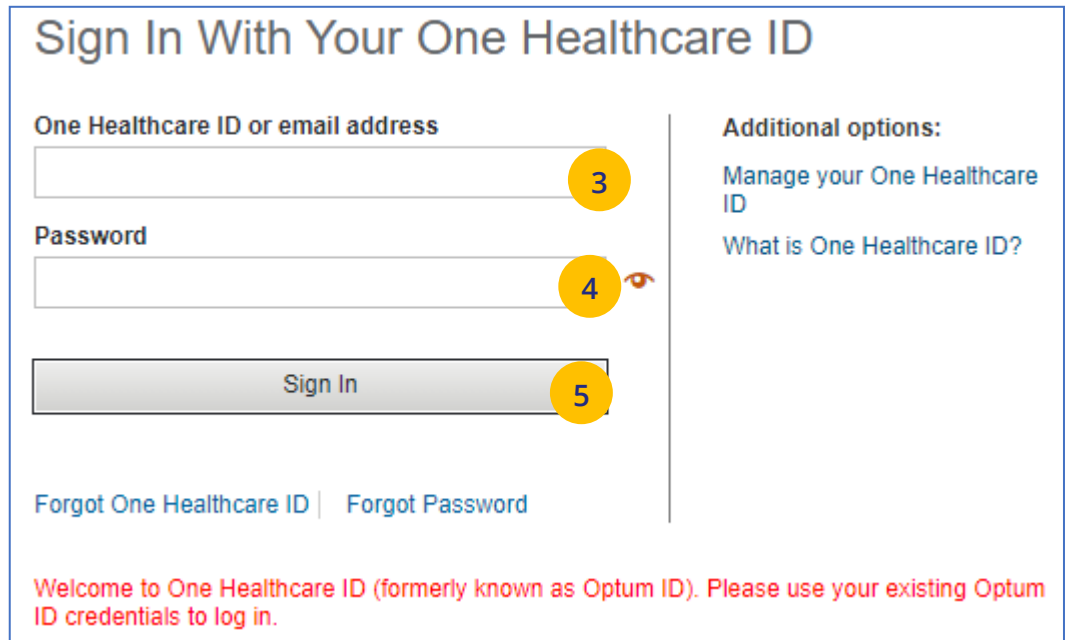
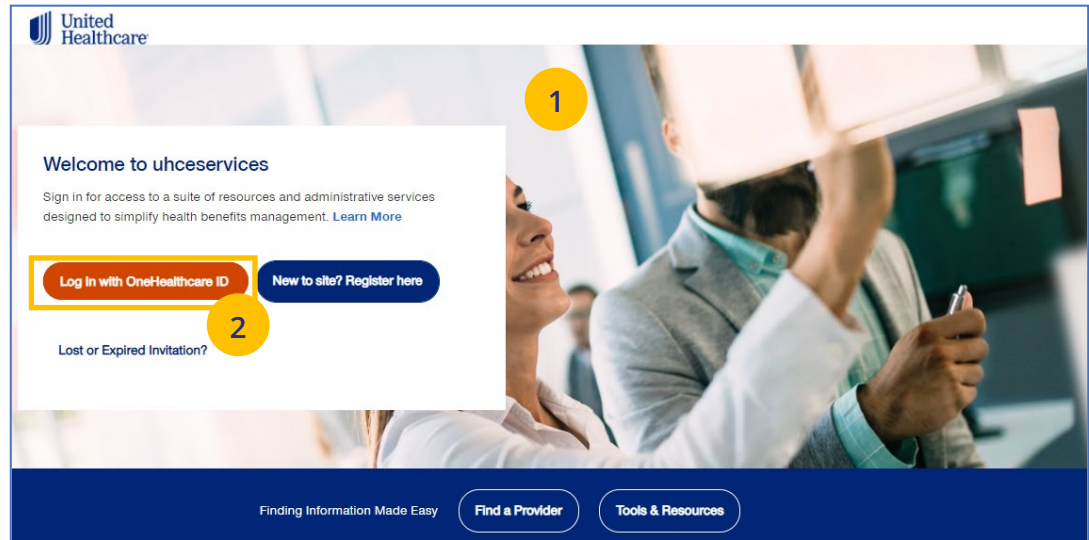
NOTE: If you have lost or deleted your email invitation, click the **Lost or Expired Invitation?** link. Follow the prompts to get a new invitation sent to you.

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.

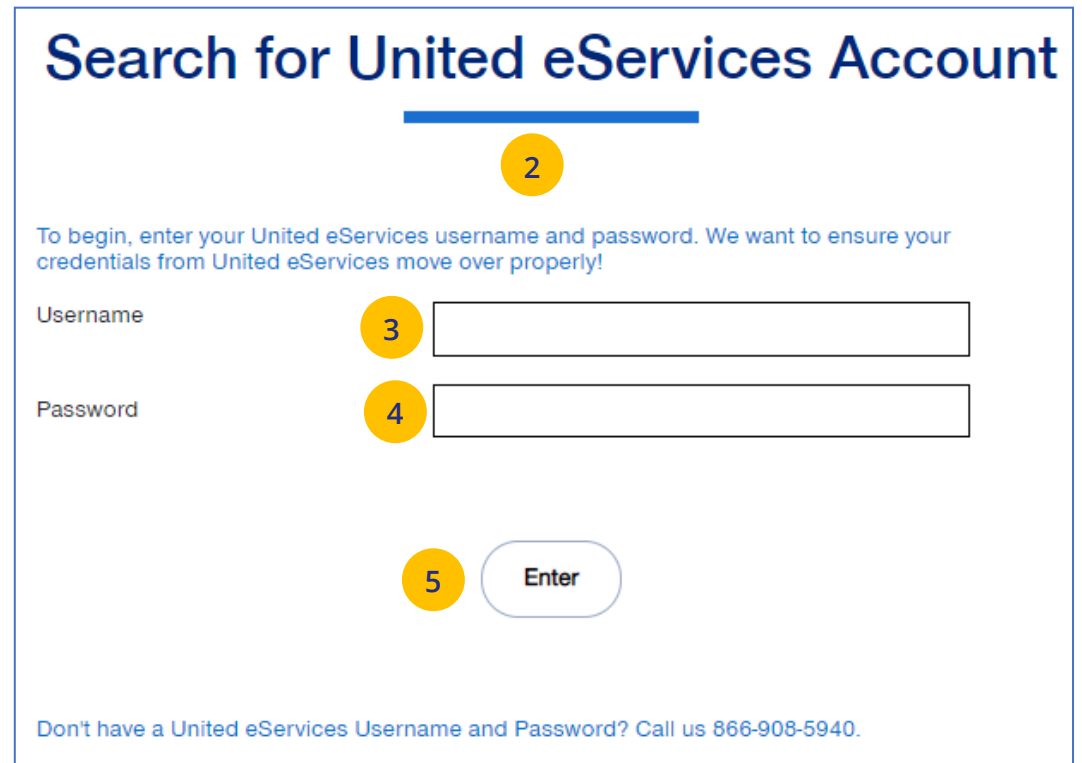
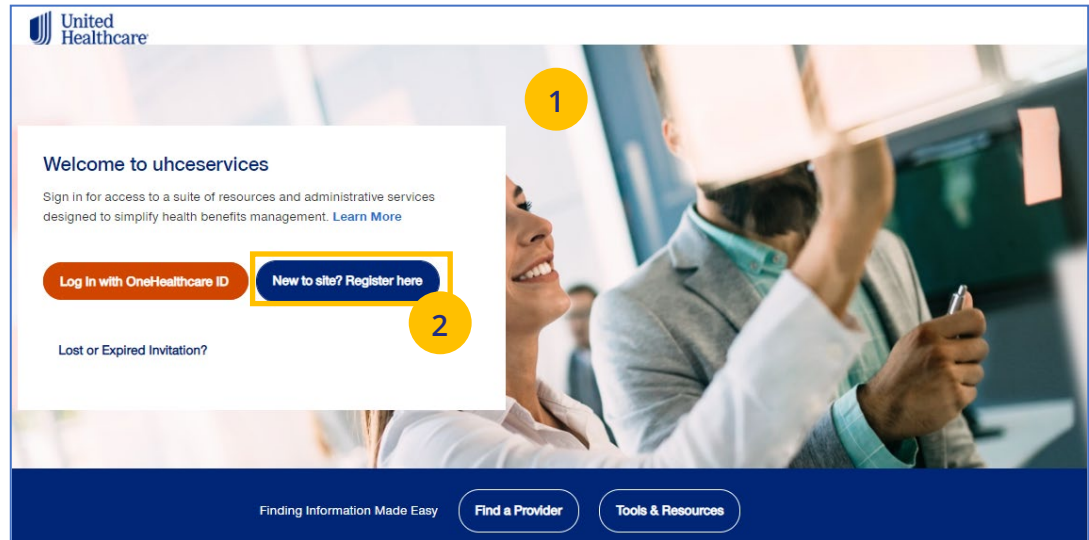
NOTE: If user is inactive for 13 months, the account will be deactivated. If this happens, contact the technical support line.



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.

United Healthcare

Search for United eServices Account

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

Username

Password

You've been successfully migrated to uhceservices.com! You will no longer be able to access United eServices through United eServices login but can through uhceservices. Check your inbox for the subject line: Your registration for uhceservices.com.

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

Your registration for uhceservices.com

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

Dear Olivia Gerber,

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

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

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

GERARDI INSURANCE SERVICES INC
RAY SMITH
MACK JACKSON

Get Started

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

Thank you,
uhceservices.com Administration Team

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

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

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

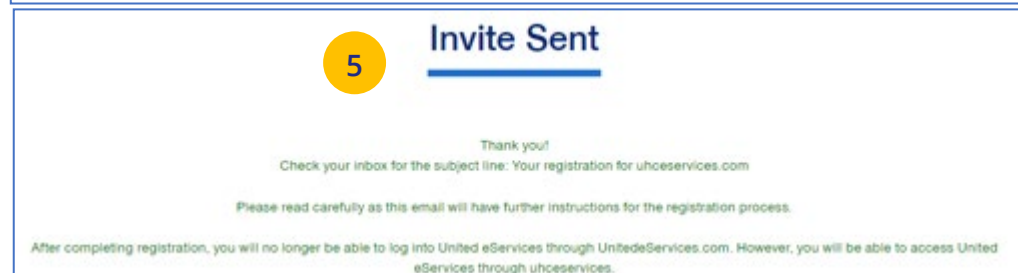
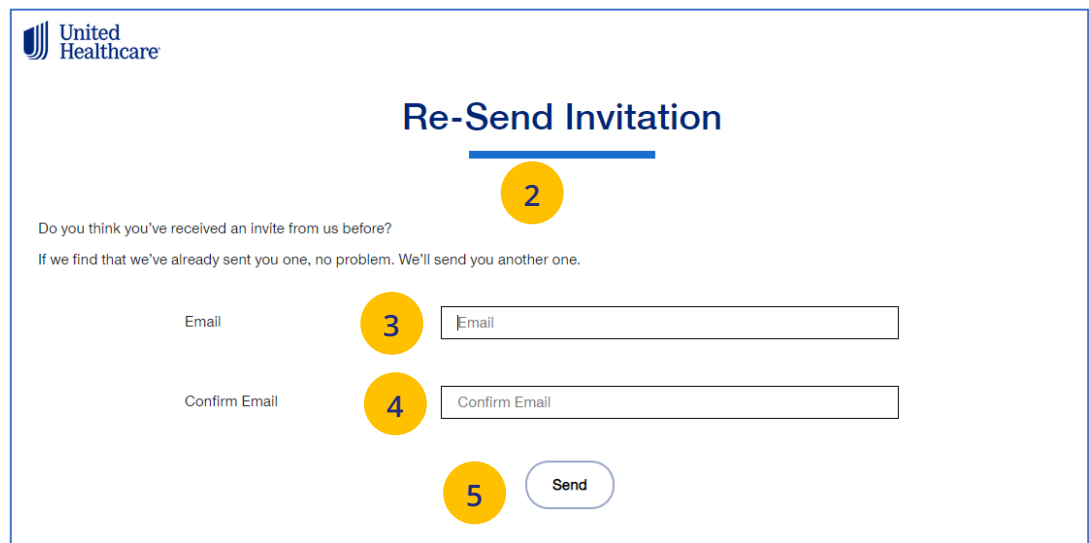
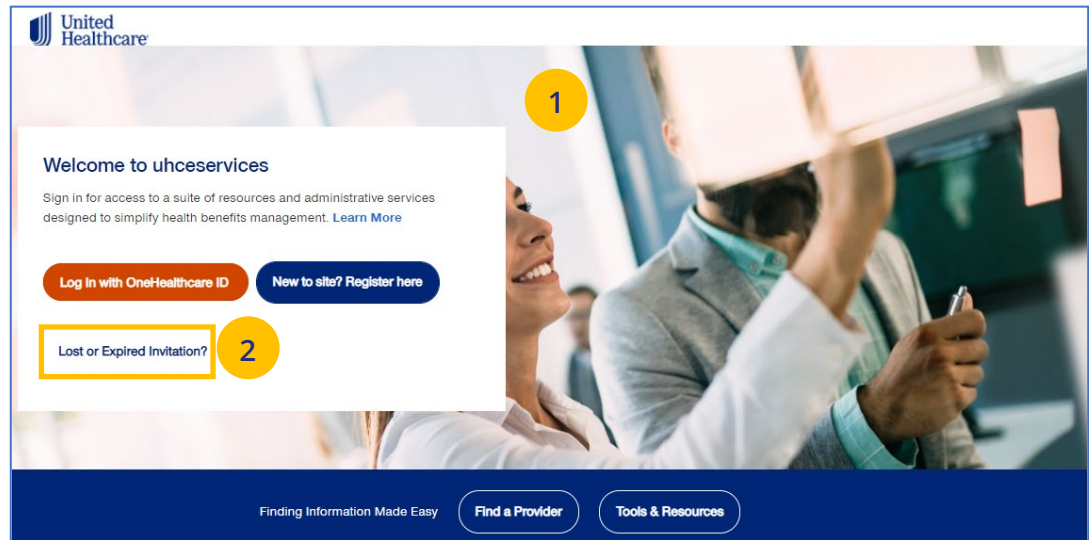


1 | Access: Lost or Expired Invitation

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

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

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




The **Home** page displays the following:

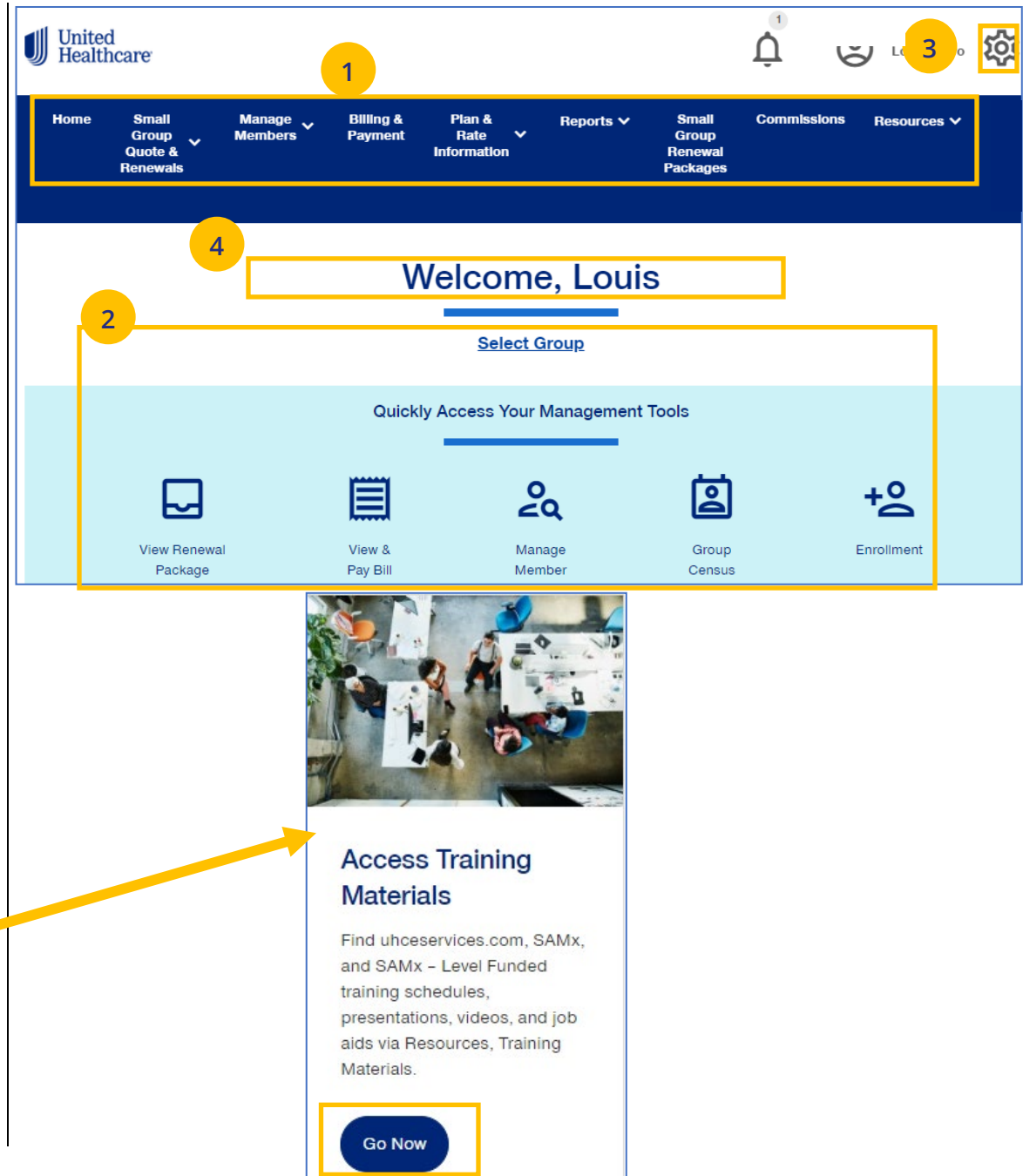
1. **Menu** items across the top of the page
2. **Quick Access links** or “shortcuts” provide easy access to the most common tasks performed
3. **Gear icon** that allows you to do the following:
 - invite others to use uhceservices.com
 - view your personal information
 - change your password
 - view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

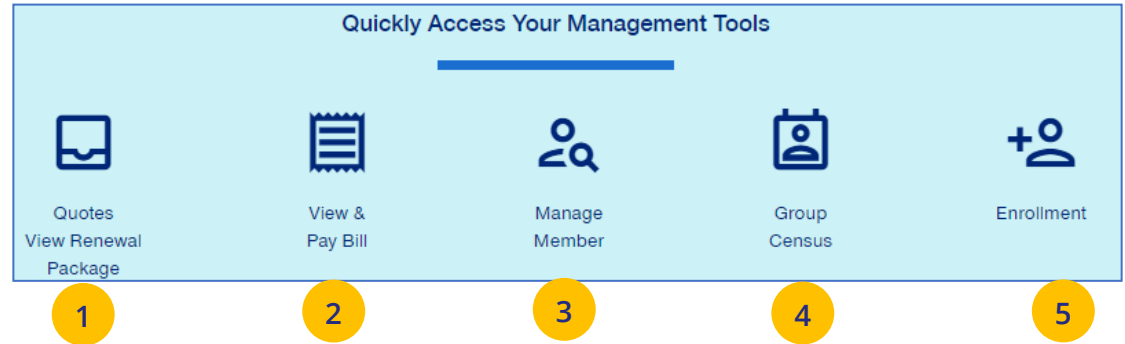


3 | Quickly Access Your Management Tools

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

These shortcuts most often include:

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



4 | Gear Icon

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

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

The screenshot displays the United Healthcare Services user interface. At the top left is the United Healthcare logo. The top right corner features a notification bell icon with a '1' badge, a yellow arrow pointing right, and a gear icon. Below the logo is a dark blue navigation bar with the following menu items: Home, Small Group Quote & Renewals, Manage Members, Billing & Payment, Plan & Rate Information, Reports, Small Group Renewal Packages, Commissions, and Resources. The main content area shows a welcome message: "Welcome, Louis" with a "Select Group" link below it. A light blue section titled "Quickly Access Your Management Tools" contains five icons: "View Renewal Package", "View & Manage", "Group", and "Enrollment". A grey dropdown menu is open from the gear icon, listing the following options: "Invite User", "Manage User", "My Settings", "Manage Broker", "Manage Employer", "Message Center", and "Logout". A yellow box highlights the "Invite User" option in the dropdown menu.



4 | Invite User

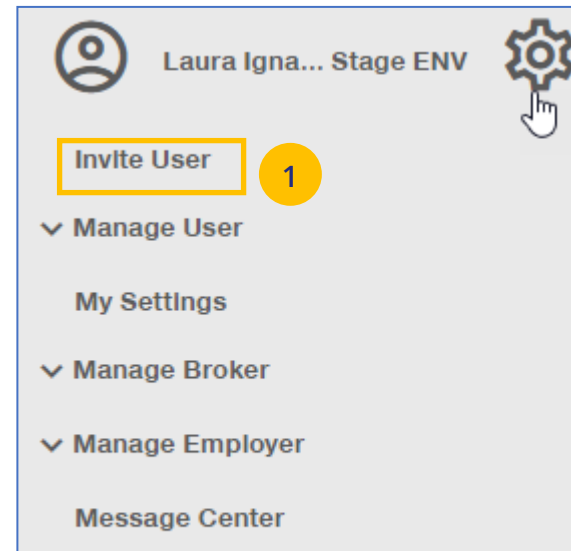
Broker users with user maintenance permissions can give support staff access to uhceservices so they can perform functions on the broker's behalf. To invite a someone to use uhceservices.com:

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

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

Broker and Employer Roles

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



Invite a Broker User

Agency/Broker Name:

User Information

By adding any individual as a portal user, the Group is granting the individual access to protected group information. Each user will create a User ID and password and in doing so, certifies that they have the authority to access confidential and personal information protected by Law. Company agrees to indemnify UnitedHealthcare Insurance Company and its affiliated companies from any and all liability and loss, expenses (including reasonable attorney's fees), and claims for damages or injury arising from any Incident or Breach (as defined by HIPAA) that is associated with the identified users. This indemnification includes any claim relating to the validity or eligibility information provided.

First Name *

Last Name *

Email *

Role *

Broker User Type

User Type identifies the Principals/Owners associated to this Broker/Agency. By selecting the Broker User Type of Administrator, you are assigning this user as the Principal/Owner.

Administrator Delegate



4 | Invite User (continued)

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

Invite a Broker User

Agency/Broker Name:

User Information

By adding any individual as a portal user, the Group is granting the individual access to protected group information. Each user will create a User ID and password and in doing so, certifies that they have the authority to access confidential and personal information protected by Law. Company agrees to indemnify UnitedHealthcare Insurance Company and its affiliated companies from any and all liability and loss, expenses (including reasonable attorney's fees), and claims for damages or injury arising from any Incident or Breach (as defined by HIPAA) that is associated with the identified users. This indemnification includes any claim relating to the validity or eligibility information provided.

First Name *

Last Name *

Email *

Role * **Compare Roles**

Broker User Type

User Type identifies the Principals/Owners associated to this Broker/Agency. By selecting the Broker User Type of Administrator, you are assigning this user as the Principal/Owner.

Administrator Delegate

4 **5**

Cancel **Create**

Invite a Broker User


User Louis Johnson successfully invited as Agency/Broker User

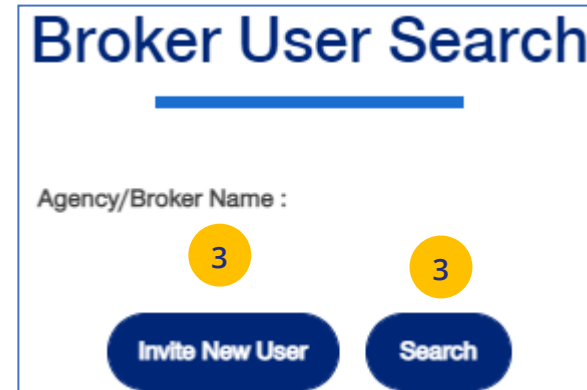
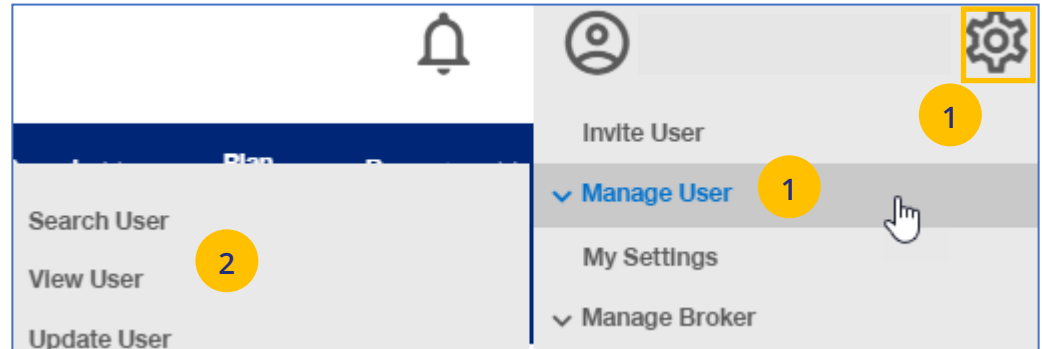
5



4 | Manage User


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

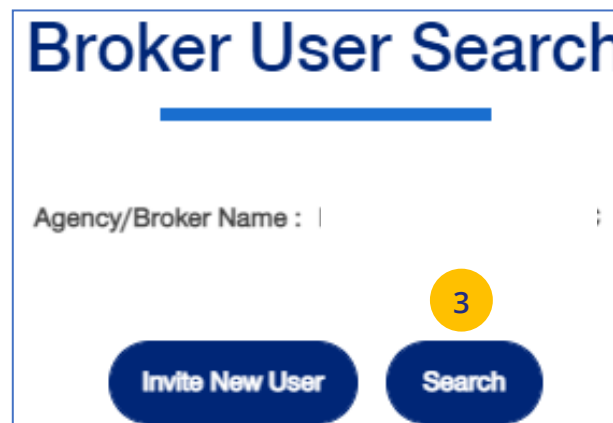
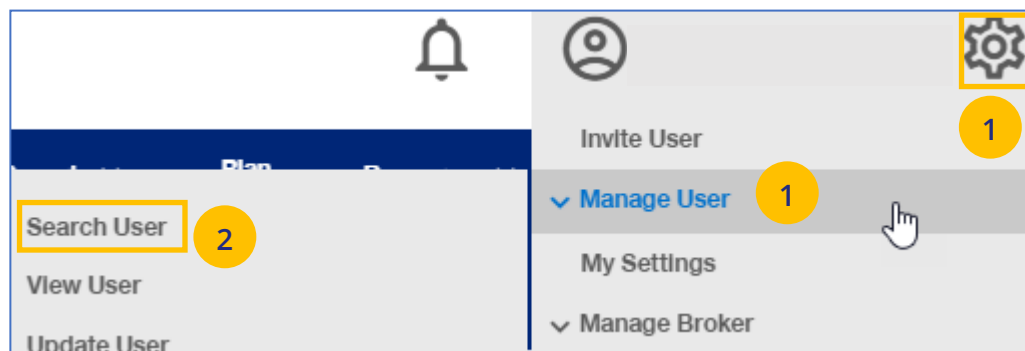
1. Click the **gear icon**  and select **Manage User**. You will have three options:
 - **Search User** – You can search for a user or invite a new user (if you have that capability)
 - **View User** – You can search for a user or invite a new user (if you have that capability)
 - **Update User** – You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



4 | Re-Invite a User

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

1. Click the **gear icon**  and select **Manage User**.
2. Select **Search User**.
3. Click the **Search** button.



4 | Re-Invite a User (continued)

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

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

Filter by

4

Select Deactivation Date Range
Select the date range

Optum ID

First Name

Last Name

User Email

Select Status

Select Role

Clear Filter

(Enabled)					Select User
One Healthcare ID	User Email	Role	Last Login	Deactivation	
apiatt3	anglette_d_piatt...	Standard Broker with Commissions	04/07/2020	05/07/2021	
(Invited)					Select User
	anglette_d_piatt...	Standard Broker with Commissions	N/A	N/A	Re-Invite
(Enabled)					Select User
lignacio3	laura_l_ignacio@...	Broker Lead with User Maintenance	06/01/2021	N/A	
Dylan, Louis (Invited)					Select User
	ldylan@compny.or...	Standard Broker with Commissions	N/A	N/A	Re-Invite

5

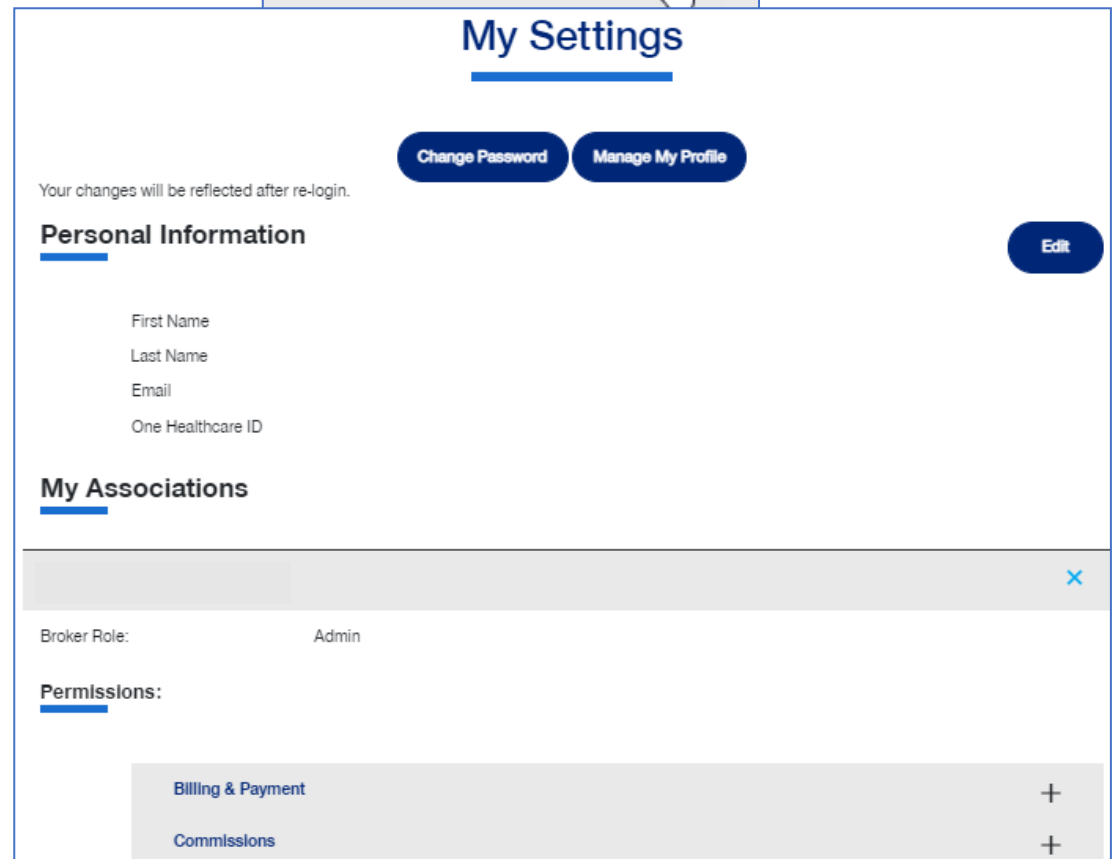
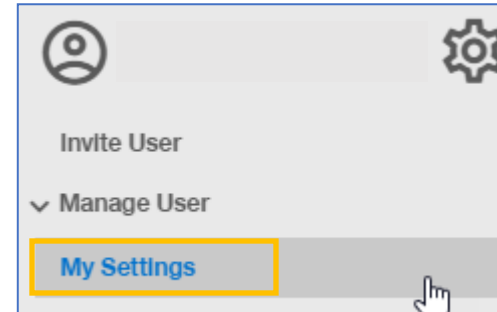
User Louis Dylan successfully re-invited as Standard Broker with Commissions.



4 | My Settings


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

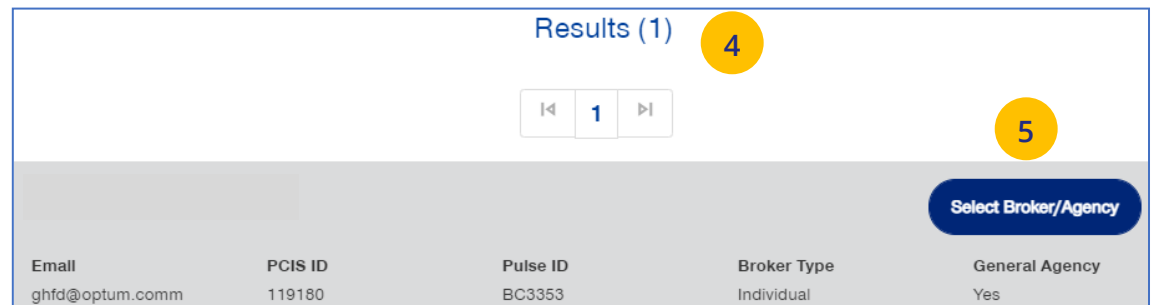
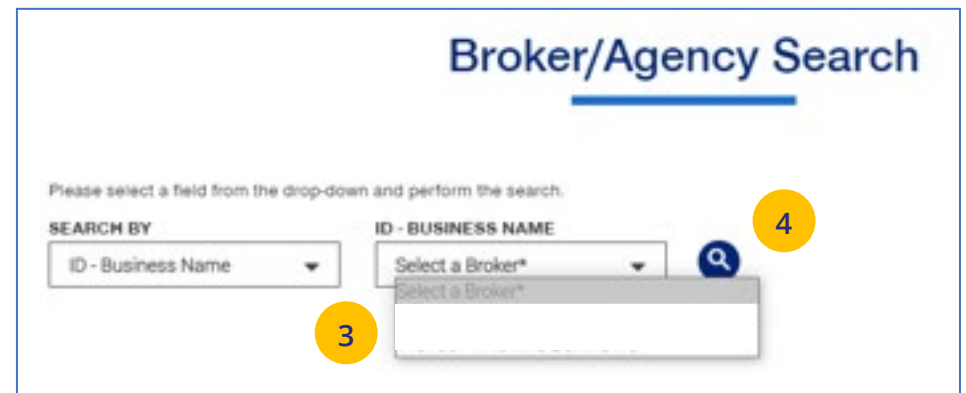
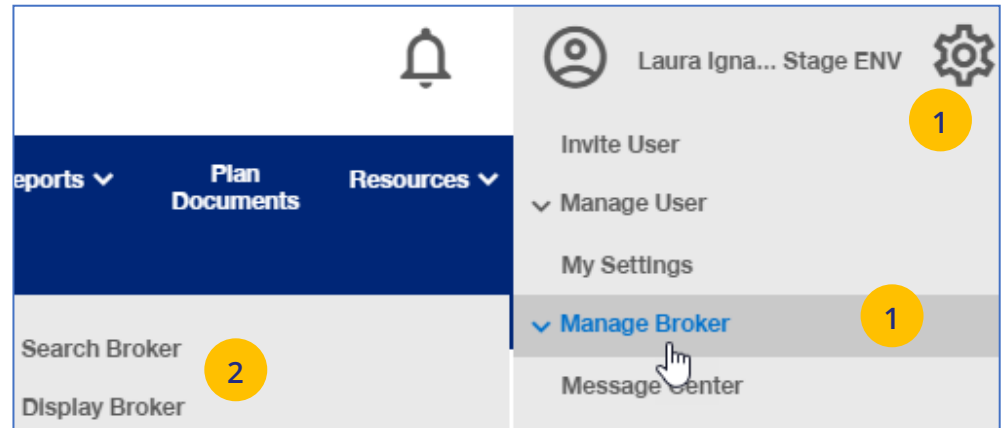
- **Change Password**
- **Manage My Profile** – Manage your One Healthcare ID.
- **Personal Information** – View details or edit personal information.
- **My Associations** – Broker associations and specific permissions.
- **Platforms/Tools** – Specific role or roles for the associated Platform/Tools
- **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

To search for a Broker, follow the steps below:

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



4 | Manage Broker (continued)

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

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

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

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



4 | Manage My Profile

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

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

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

The image displays two screenshots of a web application interface. The top screenshot, titled "My Settings", shows a navigation bar with "Change Password" and "Manage My Profile" buttons. The "Manage My Profile" button is highlighted with a yellow box and a yellow circle containing the number "1". Below the navigation bar, there is a section for "Personal Information" with fields for First Name (Hina), Last Name (Hinaemp), Email (chintakayala_bhavan1@optum.com), and Optum ID (Hinaemp). An "Edit" button is located to the right of the personal information fields. The bottom screenshot, titled "Manage My Profile", shows a progress bar with three steps: "1 Direction", "2 Selection", and "3 Review & Submit". The "2 Selection" step is highlighted with a yellow box and a yellow circle containing the number "2". Below the progress bar, there is a question: "What would you like to do with your One Healthcare ID - Hinaemp". Two radio button options are listed: "Move my associations from another One Healthcare ID into this One Healthcare ID" and "Move my associations to another One Healthcare ID". The "Next" button is highlighted with a yellow box and a yellow circle containing the number "2". A "Cancel" button is also visible.



4 | Manage My Profile (continued)

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

Manage My Profile

✓ Direction 2 Selection 3 Review & Submit

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

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

One Healthcare ID All

Hinaemp2
Hinaemp3
Hinaemp10
Hinaemp123
Hinaemp8
Hinaemp9
Hinaemp6
Hinaemp7
Hinaemp4

Or

Move my associations from another One Healthcare ID I own

One Healthcare ID:

Password:

Cancel Previous Next



4 | Manage My Profile (continued)

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

✓ Direction ✓ Selection 3 Review & Submit

Please confirm you wish to move the following associations to your One Healthcare ID - Hinaemp [FAQs](#)

Hinaemp2

Louis Agency - 99999

6

Cancel Previous **Submit**

Manage My Profile

✓ Direction ✓ Selection ✓ Review & Submit

6 Your move was successful. Please log off and log back in.

7 **Log off**



4 | Roles and Permissions (My Associations)

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

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

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

My Associations 1

Louis Agency - 99999 ×

Broker Role: Admin

User Role: Broker Lead with User Maintenance

Permissions: 2

Billing & Payment +

Commissions +

Member Management ×

Add Member

Request ID card

Term Member

Update Member

View Eligibility

View Member

Quoting & Renewals ×

Quoting

Renewal

Renewal Package

Reports ×

Banking Reports

Delinquent Employer Accounts

Level Funded Reporting



4 | View and Update Broker Contact Information

To update broker contact information, follow the steps below:

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

This screenshot shows the top portion of the 'Contact Information' screen. The title 'Contact Information' is underlined. In the top right corner, there is a yellow circle with the number '1' and a blue 'Edit' button.


This screenshot shows the main form area of the 'Contact Information' screen. It includes a note: 'Please note that this contact information will apply to the Broker ID and all associated users.' The form contains the following elements:

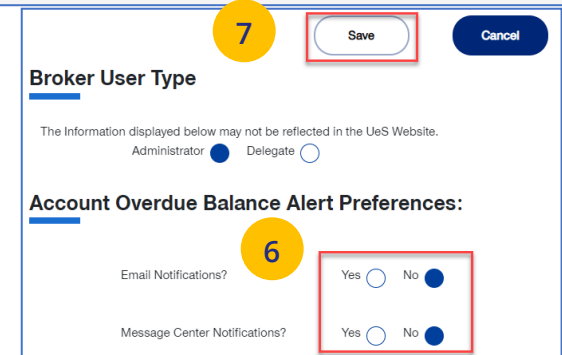
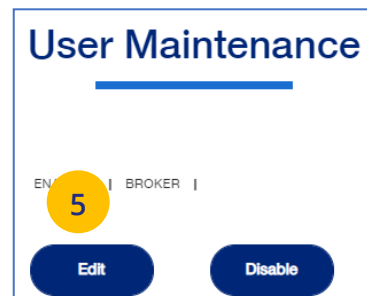
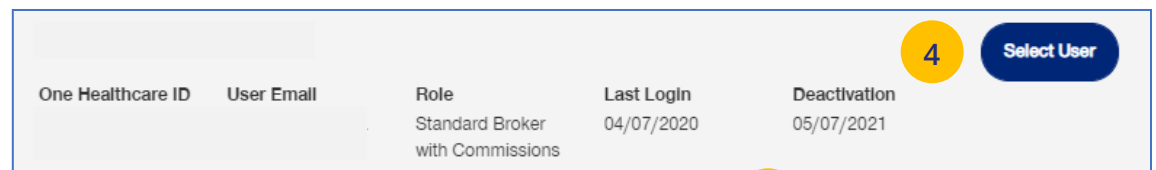
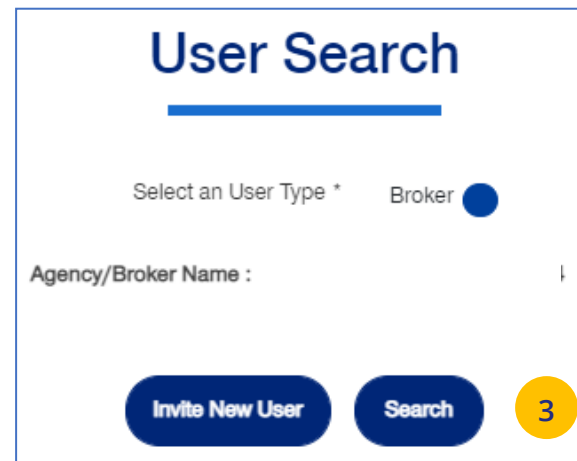
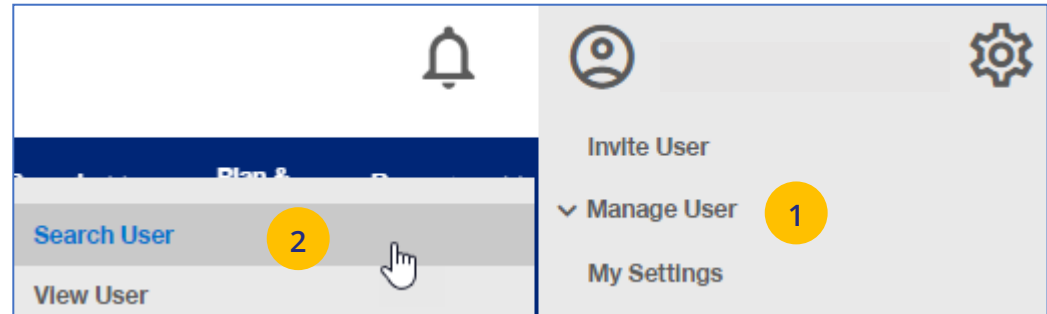
- A yellow circle with the number '2' next to the 'Go Green' label and radio buttons for 'Yes' and 'No'.
- Input fields for 'Business Email', 'Business Phone', 'Business Phone Ext', 'Business Fax', and 'C/O'. A yellow circle with the number '3' is positioned to the right of these fields.
- Blue 'Save' and 'Cancel' buttons in the top right corner, with a yellow circle with the number '4' next to the 'Save' button.



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


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

1. Click the **gear icon**  and select **Manage User**.
2. Select **Search User**. The **User Search** screen displays.
3. Click **Search**.
4. Find the user you need and click **Select User**.
5. 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**.

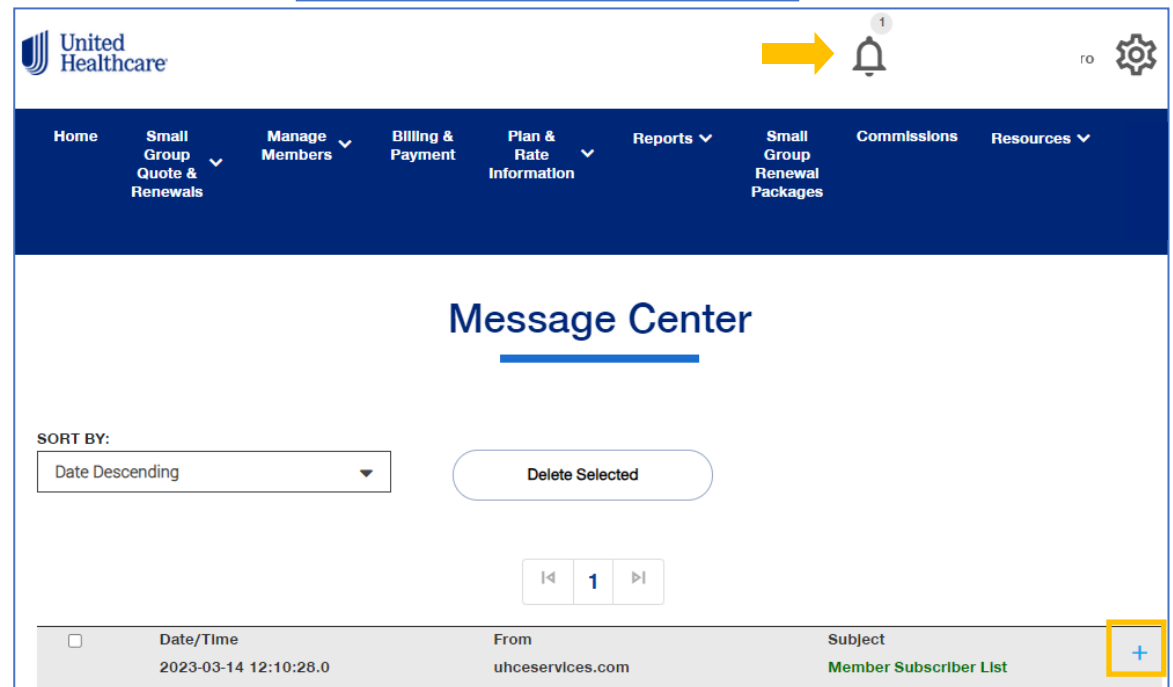
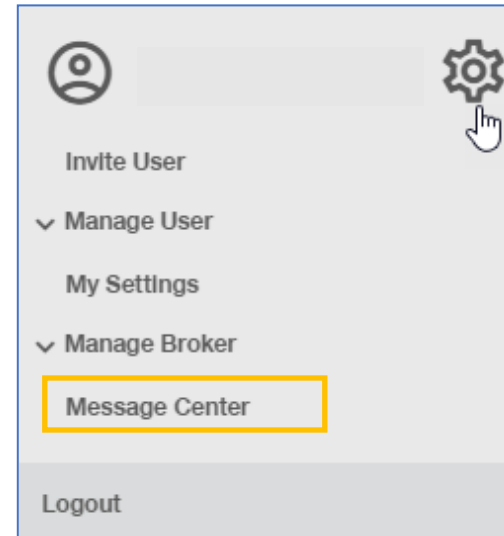


4 | Message Center

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


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

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



5 | Group Selection

To select a group from the Home page:

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

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

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

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

The screenshots illustrate the group selection process:

- Home Page:** The 'Select Group' link is highlighted with a yellow box and a '1' in a yellow circle.
- Group Search:** The search input field and search icon are highlighted with a yellow box and a '2' in a yellow circle.
- Group Search Results:** The 'Select Group' button is highlighted with a yellow box and a '3' in a yellow circle.
- Home View:** The 'View Group Information' and 'Change Group' links are highlighted with yellow boxes and a '3' in a yellow circle.



5 | Group Selection: PEO Groups

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

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

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

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

2. Find the **Child Group** you need and click **Select Group**. The Parent Group and **Child Group** information will both show as your default Groups on the home page.

Note: You can click **Change Child Group** and select another child group if more than one are available. To display another group, you must click **Change Group** instead of **Change Child Group**.

PEO_ADP_PARENT4 | GROUP NUMBER : [Change Group](#)

[Select Child Group](#) 1

_CHILD2 1

Group Number

2 [Select Group](#)

_CHILD1

Group Number

[Select Group](#)

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

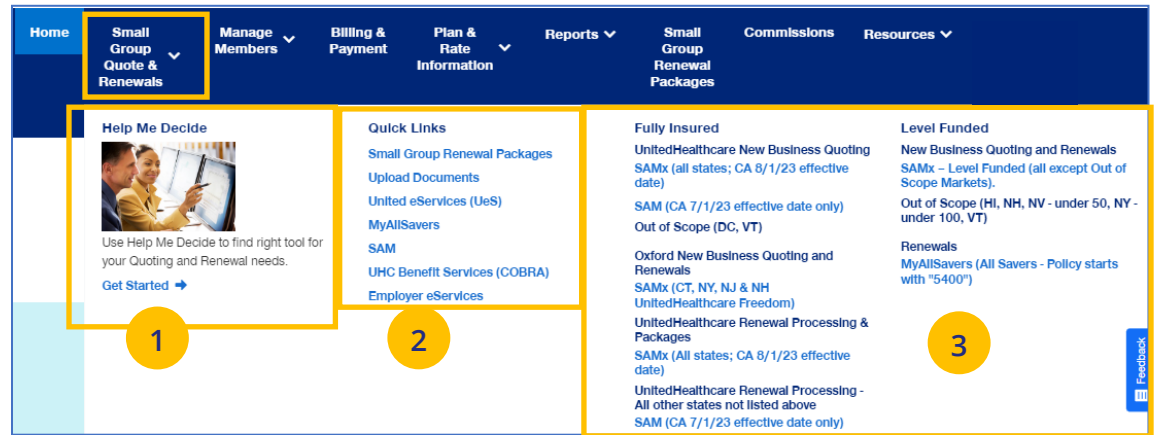
_CHILD2 | GROUP NUMBER : [Change Child Group](#) 2



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

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

To do this, follow the steps below.

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



6 | Help Me Decide (continued)

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.

Help Me Decide

Please enter the required fields below. The Results section below will help you select the right option for your Quote or Renewal.

**Required Fields*

I'm looking to...*

Create a New Business Quote

Process a Renewal

Select the effective date:*

June Select One 2021

Select the funding type:*

[Contact Us](#) for support around Self-Funded needs.

Fully Insured

Level Funded

Primary Location ZIP Code:*

Enter Zipcode

Select Products:*

Medical - Oxford

Medical - UnitedHealthcare

Dental

Vision

Basic Life

Supplemental Life

Dependent Life

Short Term Disability (STD)

Long Term Disability (LTD)



6 | Help Me Decide (continued)

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



Results

Product: **Medical - UnitedHealthcare**

[Create a Medical - UnitedHealthcare Quote](#)

5



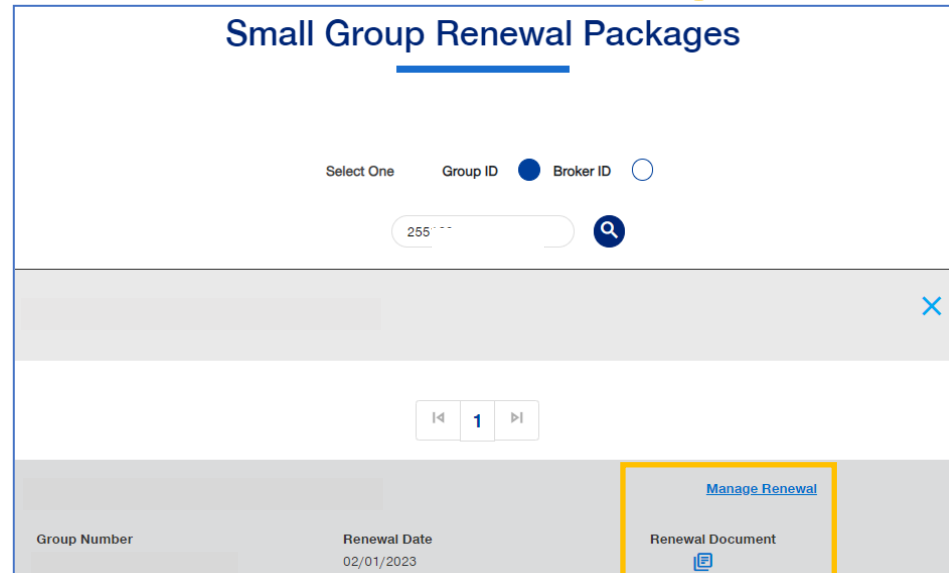
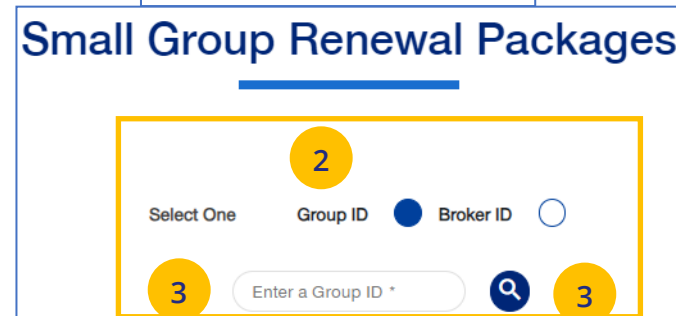
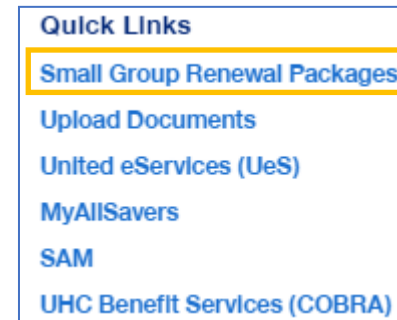
6 | Quick Links: Small Group Renewal Packages

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

1. Click **Small Group Renewal Packages**. The **Small Group Renewal 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**.

Select up to 20 documents.

Select All on current page Download (0/20) ↓

Group Number	Renewal Date	Renewal Document
<input type="checkbox"/> 1	05/01/2021	Manage Renewal 3
<input type="checkbox"/> 1	05/01/2021	Manage Renewal



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.

Select Total Packages
Select All on current page

Download (1767/1767)

Only 1000 renewals can be requested for download at a time. To continue with the download, deselect some of the renewal packages to keep at 1000 or less.

Group Number	Renewal Date		Manage Renewal
	05/01/2021	4	Renewal Document
			Manage Renewal
Group Number	Renewal Date		Renewal Document
	05/01/2021		

UnitedHealthcare

Dashboard Quick Quotes Full Shopping KATHLEEN DENBER

Welcome to Sales Automation Management (SAMx)

The SAMx experience leverages updated technology and incorporates your insights and feedback to help us work together better.

You can expect:

- Flexibility to allow you to work the way you work best
- Dependable and loyal experience to quote, enroll and renew your business
- Side-by-side offerings of Medical and Dental and Vision plans

Get started by choosing one of the following action buttons.

Generate Full Quote with Detailed Census Generate Quick Quote New Business Dashboard Renewal Dashboard

View Recent Activity



6 | Quick Links: Upload Documents

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

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

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

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

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

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

Quick Links

Small Group Renewal Packages

Upload Documents 1

Upload Documents

1

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

Please select a document name and browse your computer for your file. You may upload five documents at a time.

Document Name * Select Document for Upload *

[Add Row \(+\)](#)

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

To check your verification click [here](#)

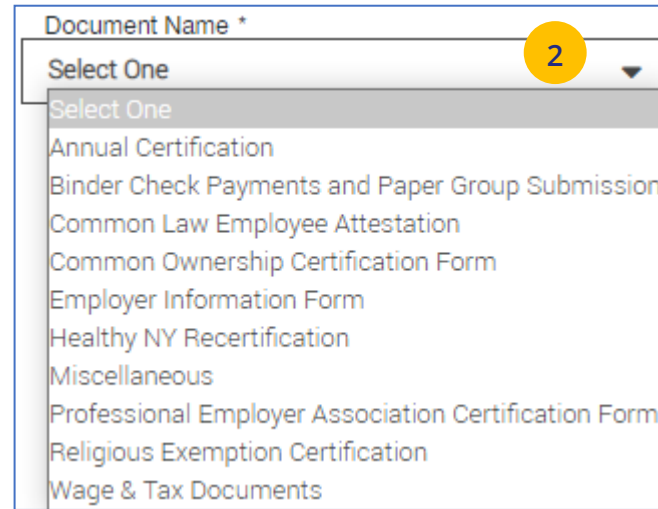
If you have recently submitted information, please allow up to 5 business days for us to process your information and update your status.



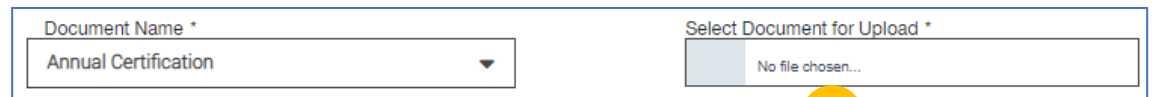
6 | Quick Links: Upload Documents (continued)

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

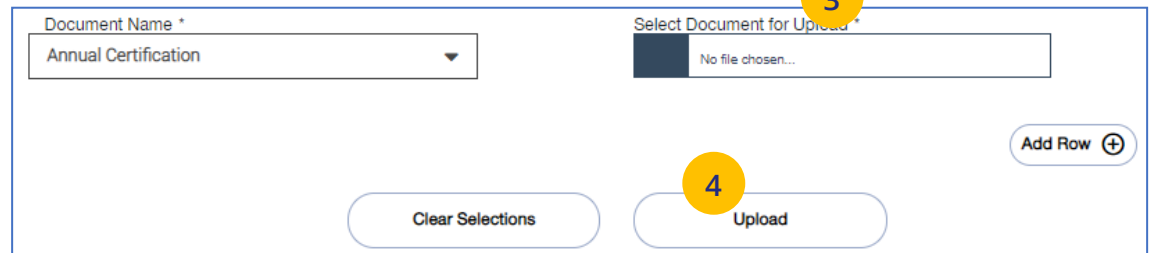
[TABLE OF CONTENTS](#)



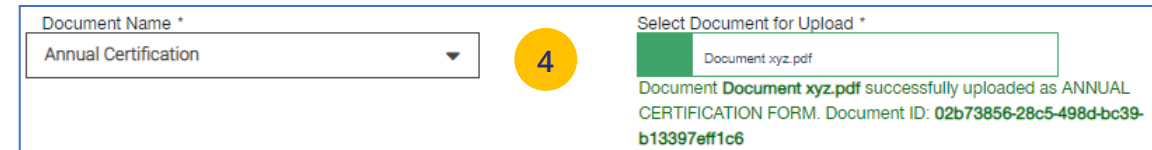
A close-up of the 'Document Name *' dropdown menu. The menu is open, showing a list of document types. A yellow circle with the number '2' is positioned over the top right corner of the dropdown box. The list items are: Select One, Annual Certification, Binder Check Payments and Paper Group Submission, Common Law Employee Attestation, Common Ownership Certification Form, Employer Information Form, Healthy NY Recertification, Miscellaneous, Professional Employer Association Certification Form, Religious Exemption Certification, and Wage & Tax Documents.



The first row of the upload interface. It features a 'Document Name *' dropdown menu with 'Annual Certification' selected. To its right is a 'Select Document for Upload *' box with the text 'No file chosen...'. A yellow circle with the number '3' is positioned over the right side of the 'Select Document for Upload' box.



The second row of the upload interface. It features a 'Document Name *' dropdown menu with 'Annual Certification' selected. To its right is a 'Select Document for Upload *' box with the text 'No file chosen...'. Below these elements are four buttons: 'Clear Selections', 'Upload' (with a yellow circle '4' over it), 'Add Row' (with a plus icon), and another 'Add Row' (with a plus icon).



The third row of the upload interface. It features a 'Document Name *' dropdown menu with 'Annual Certification' selected. To its right is a 'Select Document for Upload *' box with a green bar and the text 'Document xyz.pdf'. Below these elements is a confirmation message: 'Document **Document xyz.pdf** successfully uploaded as ANNUAL CERTIFICATION FORM. Document ID: **02b73856-28c5-498d-bc39-b13397eff1c6**'. A yellow circle with the number '4' is positioned over the right side of the 'Select Document for Upload' box.



6 | Quick Links: United eServices (UeS)

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

Note: First Time Access to UeS for Brokers:

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

Quick Links

[Small Group Renewal Packages](#)

[Upload Documents](#)

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

[MyAllSavers](#)

[SAM](#)

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



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

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

Manage My UeS ID

Your account is associated to more than one UeS Account. Please select the account you would like to use from the below list:

jeetp3
 jeetp9

Submit

We identified new association(s) that are not yet established in UeS. Please select any associations from the list below to have them associated to the UeS account selected above.

All

119180 business_name



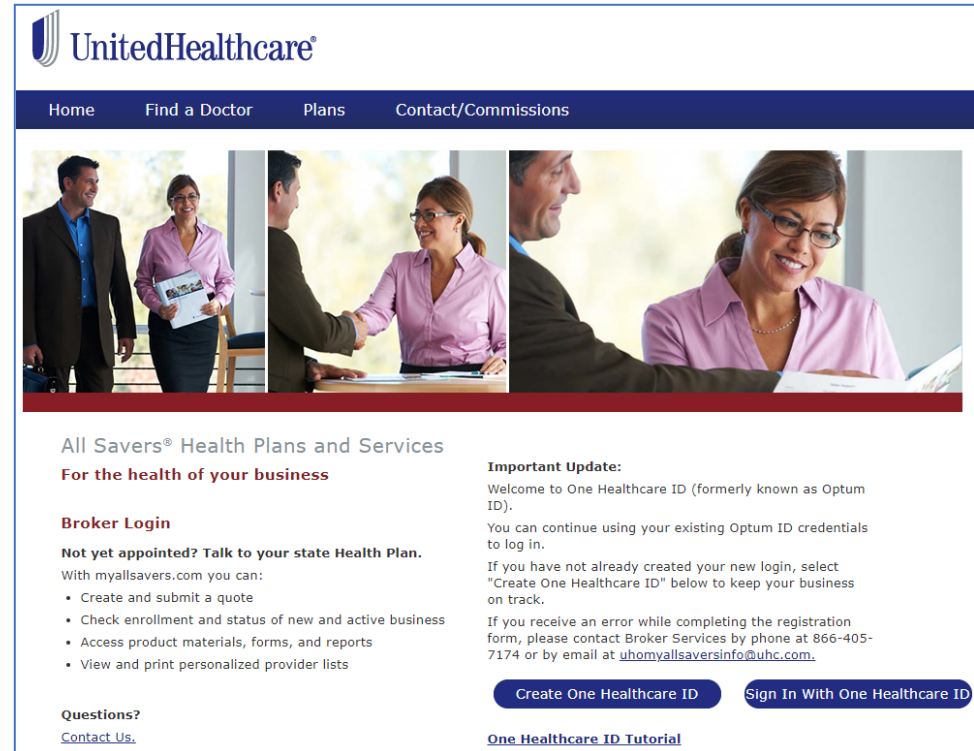
6 | Quick Links: MyAllSavers (Level Funded)

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

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



A screenshot of a navigation menu titled "Quick Links". The menu items are: "Small Group Renewal Packages", "Upload Documents", "United eServices (UeS)", "MyAllSavers", "SAM", and "UHC Benefit Services (COBRA)". The "MyAllSavers" link is highlighted with a yellow rectangular border.



A screenshot of the UnitedHealthcare website. The header features the UnitedHealthcare logo and navigation links: Home, Find a Doctor, Plans, and Contact/Commissions. Below the header is a banner image showing three people in a professional setting. The main content area is titled "All Savers® Health Plans and Services For the health of your business". It includes sections for "Broker Login" and "Not yet appointed? Talk to your state Health Plan." with a list of actions users can take on myallsavers.com. An "Important Update" section provides information about the transition to One Healthcare ID. At the bottom, there are buttons for "Create One Healthcare ID" and "Sign In With One Healthcare ID", along with links for "Questions? Contact Us." and "One Healthcare ID Tutorial".

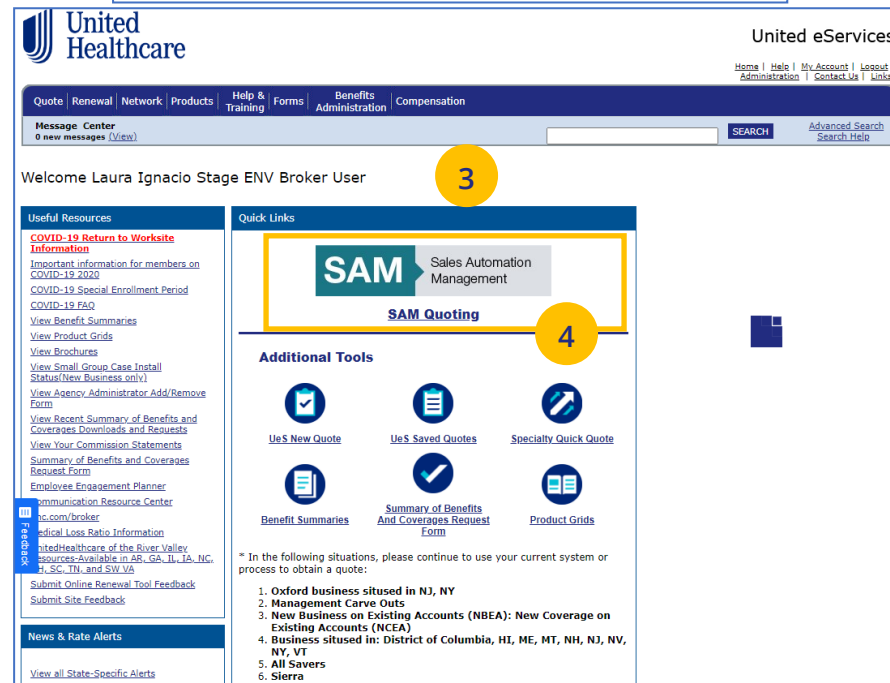
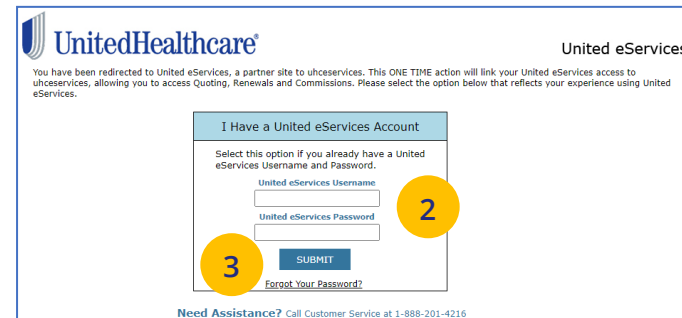
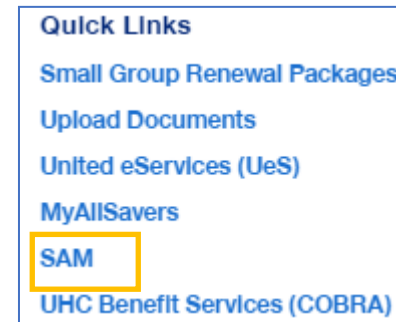
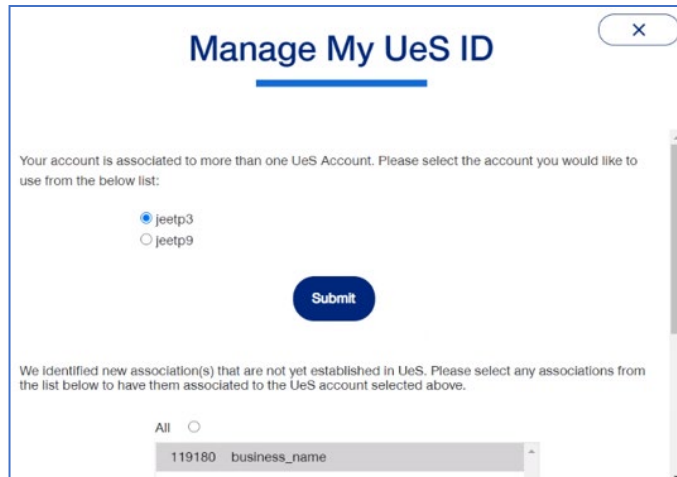


6 | Quick Links: SAM

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

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

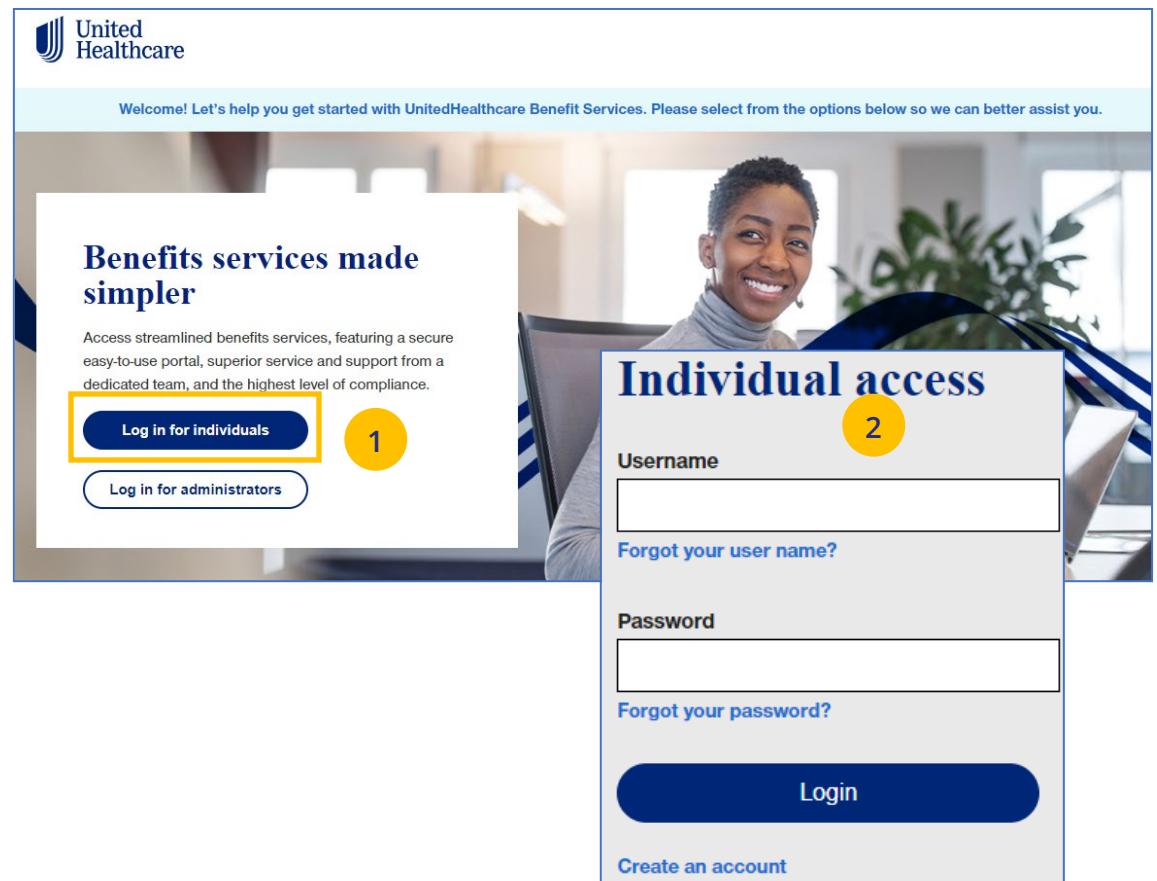
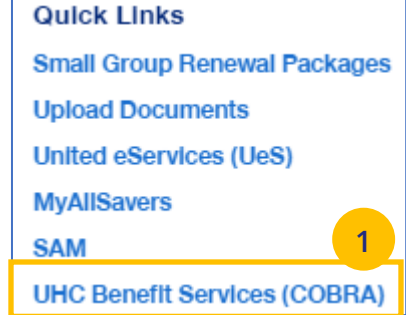
Note: Manage My UeS ID – If your UeS account is associated to more than one account, a pop-up screen displays asking you to select the account you want to use. Select the account you need or select All. Then click **Submit**.



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.

Quick Links

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

Employer eServices

Employer eServices

Welcome to your benefits administration site.

Log In
1

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

[View Login Help](#) →


Information You Need When You Need It

Employer eServices

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

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

[Tour the New Site](#) →




What's New

COVID-19


UHC COVID-19

[View important information](#) →



Website Demo

[View the demo](#) →



Login Help

[View login help](#) →



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

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

The screenshot shows a navigation menu for the Small Group Quoting & Renewal section. The menu is organized into several categories:

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

The **Small Group Renewal Packages** section is highlighted with a yellow border and contains the following sub-sections:

- Help Me Decide**: Includes an image of two people reviewing a screen and the text: "Use Help Me Decide to find right tool for your Quoting and Renewal needs." with a "Get Started" button.
- Quick Links**:
 - Small Group Renewal Packages
 - Upload Documents
 - United eServices (UeS)
 - MyAllSavers
 - SAM
 - UHC Benefit Services (COBRA)
 - Employer eServices
- Fully Insured**:
 - UnitedHealthcare New Business Quoting SAMx (all states; CA 8/1/23 effective date)
 - SAM (CA 7/1/23 effective date only)
 - Out of Scope (DC, VT)
 - Oxford New Business Quoting and Renewals SAMx (CT, NY, NJ & NH UnitedHealthcare Freedom)
 - UnitedHealthcare Renewal Processing & Packages SAMx (All states; CA 8/1/23 effective date)
 - UnitedHealthcare Renewal Processing - All other states not listed above SAM (CA 7/1/23 effective date only)
- Level Funded**:
 - New Business Quoting and Renewals SAMx - Level Funded (all except Out of Scope Markets).
 - Out of Scope (HI, NH, NV - under 50, NY - under 100, VT)
 - Renewals**: MyAllSavers (All Savers - Policy starts with "5400")



7 | Manage Members

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

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

The screenshot displays a navigation bar with several tabs: Home, Small Group Quote & Renewals, Manage Members, Billing & Payment, Plan & Rate Information, Reports, Small Group Renewal Packages, Commissions, and Resources. The 'Manage Members' tab is selected, and its dropdown menu is open, listing the following options: Member Search, View Member, Enroll Member, Update Member, Terminate Member, Request ID Card, and Reinstate Member. The main content area shows the 'Home View for Louis' page, which includes the text 'SAMPLE GROUP' and 'GROUP NUMBER 1234567', along with links for 'View Group Information' and 'Change Group'.




7 | Member Search / View Member

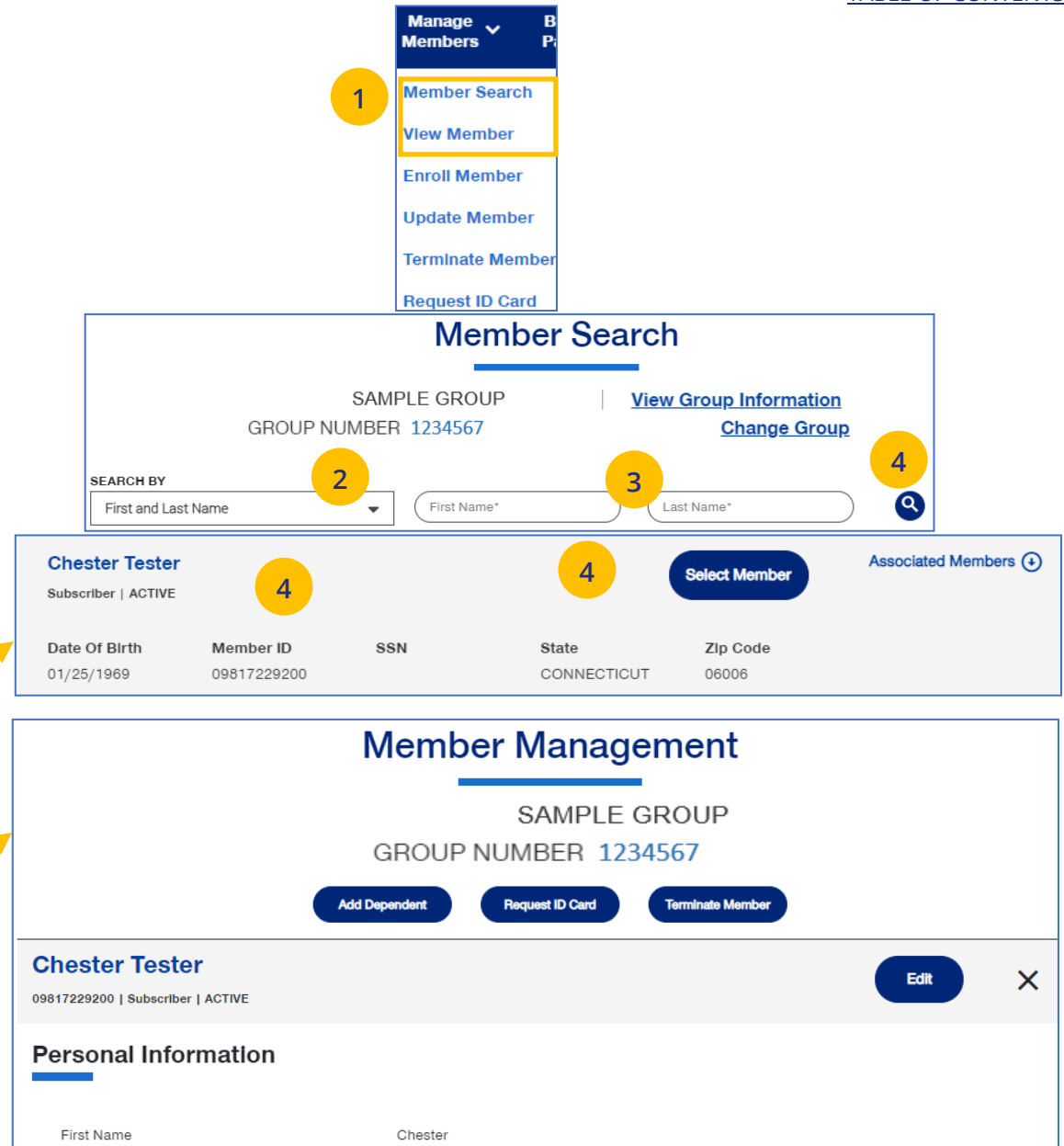
The **Member Search** and **View Member** tabs are used to search for a specific member record. **They both perform the same function.** You can search for a member using one of the following options:

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

To search for a member:

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

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



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

Member Search Section:

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

Member Management Section:

- 4:** A search result for "Chester Tester" is displayed, including status "Subscriber | ACTIVE" and a "Select Member" button.
- Below the name, a table lists details: Date Of Birth (01/25/1969), Member ID (09817229200), SSN, State (CONNECTICUT), and Zip Code (06006).
- Below the search results, the "Member Management" screen is shown for "Chester Tester". It includes a header with "SAMPLE GROUP" and "GROUP NUMBER 1234567", and buttons for "Add Dependent", "Request ID Card", and "Terminate Member".
- The "Personal Information" section is partially visible, showing "First Name" as "Chester".

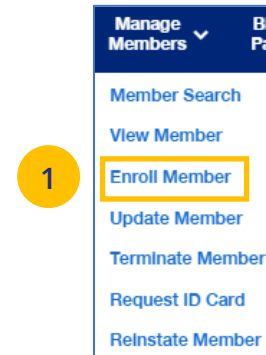


8 | Enroll Member

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

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

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



Member Enrollment

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

Who are you enrolling?

New Member

Dependent
(Add to existing family)

[Cancel](#)



8 | Enroll Member: Demographics

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

To enroll a new member:

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

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

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

Who are you enrolling?

2 + New Member

+ Dependent
(Add to existing family)

Cancel

Member Enrollment

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

1 Demographics | 2 Coverage | 3 Review & Submit

Fields marked with an asterisk * are required.

Product Selection

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

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

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

3 Health Products : Medical Vision Dental

Reason for Enrollment * 4 Select Reason ⓘ

Date of Qualifying Event * MM/DD/YYYY ⓘ

Requested Effective Date * MM/DD/YYYY ⓘ



8 | Enroll Member: Demographics (continued)

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

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

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

For new hire – enter the date of hire.

For open enrollment – enter the renewal effective date.

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

The screenshot shows a dropdown menu titled "Reason For Enrollment" with a close button (X) in the top right corner. Below the title is a blue horizontal line. The menu lists several options for active enrollment, each with a brief description:

- For Active Enrollment**
- Select the enrollment reason that best describes the event that allows the member to enroll.
- New Hire:** Adding a new member outside of open enrollment period qualifies for health care coverage.
- Open Enrollment:** Period of time when employees may elect or change benefit options as they qualify for health care coverage.
- Adoption:** Adopting a child qualifies for health care coverage.
- Benefit Selection:** Selecting benefits during open enrollment qualifies for health care coverage.
- Birth:** Having a baby qualifies for health care coverage.
- COBRA:** Continuing benefits after leaving a company qualifies for health care coverage. For many employers, benefit continuation after employment is covered by COBRA.
- Court or Administrative Order:** Being ordered by a court to support a child qualifies for adding health care coverage.
- Domestic Partner:** Adding a domestic partner qualifies for adding health care coverage.
- Initial Enrollment:** Adding a new member outside of the open enrollment period qualifies for health care coverage.
- Involuntary Loss of Coverage:** Adding a new member outside of open enrollment period qualifies for health care coverage.
- Late Enrollee:** Adding a new member outside of the open enrollment period qualifies for health care coverage.
- Legal Guardianship:** Being designated as a legal guardian qualifies for adding health care coverage.
- Marriage:** Adding a spouse or dependents because of marriage qualifies for health care coverage.

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

The form contains the following fields:

- Reason for Enrollment ***: A dropdown menu with "New Hire" selected and an information icon (i).
- Date of Qualifying Event ***: A date input field with "09/30/2022" and a calendar icon. A yellow circle with the number "5" is overlaid on the left side of this field.
- Requested Effective Date ***: A date input field with "12/01/2022" and a calendar icon.

Below the fields is a yellow warning box titled "Waiting Period Rules" with a warning icon (⚠):

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



8 | Enroll Member: Demographics (continued)

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.

Reason For Enrollment

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

Reason for Enrollment * ⓘ

Date of Qualifying Event * 📅

Requested Effective Date * **6** 📅

⚠️ Waiting Period Rules

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



8 | Enroll Member: Demographics (continued)

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

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

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

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

Subscriber Information

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

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

Contact Information

Home Address Line 1 *	<input type="text" value="Address Line 1"/>
Home Address Line 2	<input type="text" value="Address Line 2"/>
Home Zip Code *	<input type="text" value="Zip Code"/>
Home City *	<input type="text" value="Home City"/>
Home State *	<input type="text" value="Select State"/>
Home Phone	<input type="text" value="(XXX) XXX-XXXX"/>
Work Phone	<input type="text" value="(XXX) XXX-XXXX"/>
Mobile Phone	<input type="text" value="(XXX) XXX-XXXX"/>
Preferred Phone	<input type="text" value="Select Phone"/>
Email Address	<input type="text" value="abc@xyz.com"/>

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.

Medical Information

Plan*

HMO Provider ID* [Find Provider](#)

Current Patient Indicator Yes No

2. Click **Next**.

Progress bar: 1 Demographics (checked), 2 Coverage (active), 3 Review & Submit

Fields marked with an asterisk * are required.

John Sunnyside
Subscriber

Medical Information

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

Would you like to change to this coverage? Yes No

Billing Group*

Coverage Population*

Plan*

Provider Type

Provider Location ID [Find Provider](#)

[Add Additional Provider](#)

Navigation: [Cancel](#) [Previous](#) [Next](#) **2**



8 | Enroll Member: Coverage - Medical (continued)

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

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

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

The image displays two screenshots of the 'Medical Information' form during the 'Coverage' step of an enrollment process. The top screenshot shows the initial state where the 'PV' (Plan Variation) and 'RC' (Reporting Code) fields are empty dropdown menus. A 'Find Coverage' button is present but disabled. The bottom screenshot shows the form after selection, where the 'PV' and 'RC' fields are populated with '0005 - NON-UNION_1'. The 'Find Coverage' button is now enabled and highlighted in blue. Below this, the 'Billing Group' field is populated with '1193101-BILLGROUP'. The 'Plan' field is an empty dropdown menu. The 'Provider Type' field is an empty dropdown menu. The 'Provider Location ID' field is an empty text input field. A 'Find Provider' button is located at the bottom right of the form.



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

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

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

2. Click **Next**.

The screenshot displays a multi-section enrollment form. A yellow circle with the number '1' is positioned in the top right corner of the form area. The form is divided into four sections: Dental Information, Vision Information, Basic Life Information, and AD&D Information. Each section begins with a heading, a sub-heading 'Based on your Zip code, the following plans are available for you to choose from', and a question 'Would you like to change to this coverage?' with 'Yes' and 'No' radio buttons. Below each question are three dropdown menus for 'Billing Group', 'Coverage Population', and 'Plan'. The 'Dental Information' section has 'Yes' selected and shows '1362976-Bill Group Desc', 'POP1 - POP1', and '26071100 - plan dental | Dental 0P604'. The 'Vision Information' section also has 'Yes' selected and shows '1362976-Bill Group Desc', 'POP1 - POP1', and '26071101 - plan vision | Vision VH076'. The 'Basic Life Information' section has 'Yes' selected and shows '1362976-Bill Group Desc', 'Select Population', and 'Select Plan'. The 'AD&D Information' section has 'Yes' selected and shows '1362976-Bill Group Desc' and 'Select Plan'. At the bottom of the form are three buttons: 'Cancel', 'Previous', and 'Next'.



8 | Enroll Member: Review & Submit

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

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

Basic Life Information

Member Enrollment is successful!

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

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

Purple Cup
62684147600 | Subscriber | ACTIVE Edit ×

Basic Life

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

✓ Demographics
✓ Coverage
3 Review & Submit

Reason For Enrollment

Edit

Reason for Enrollment	Initial Enrollment	1
Requested Effective Date	02/01/2021	
Date of Qualifying Event	02/01/2021	

Coverage

1 Edit

Medical Information

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

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

Submit 2

Enrollment Status

John Sweetwater
Subscriber ×

Medical Information

Member Enrollment is successful!




7 | Update Member

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

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

To search for and edit member information:

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

Manage Members ▾

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

Member Search

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

⚠ You have one or more groups that are required to complete an eligibility verification audit. [View Group\(s\) >](#)

SEARCH BY 2 First Name* 3 Last Name* 4 🔍

Chester Tester 4 **Select Member** 4 Associated Members ⌵

Subscriber | ACTIVE

Date Of Birth	Member ID	SSN	State	Zip Code
01/25/1969	09817229200		CONNECTICUT	06006

Member Management

SAMPLE GROUP
GROUP NUMBER 1234567

Add Dependent **Request ID Card** **Terminate Member** 4

Chester Tester 5 **Edit** ✕

09817229200 | Subscriber | ACTIVE

Personal Information

First Name: Chester



7 | Update Member (continued)

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

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

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

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

Member Update

GROUP NUMBER :

1 Demographics 2 Coverage 3 Review & Submit

Louis Dylan
Subscriber | FUTURE

Subscriber Information 6

First Name *	<input type="text" value="Louis"/>
Middle Name	<input type="text" value="Middle Name"/>
Last Name *	<input type="text" value="Dylan"/>
Suffix	<input type="text" value="Select Suffix"/>
Birth Date *	<input type="text" value="06/16/1992"/>
Gender *	<input type="text" value="Male"/>
Social Security Number *	<input type="text" value="XXX-XX-XXXX"/> OR <input type="text" value="Refusal To Provide"/>

Cancel or Exit Save Save and Continue 7



7 | Update Member (continued)

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

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

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

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

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

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

Member Update

| GROUP NUMBER :

✓ Demographics 2 Coverage 3 Review & Submit

Updates saved successfully.

Louis Dylan
Subscriber | FUTURE

Coverage Effective Date 8

Requested Effective Date MM/DD/YYYY

Medical Information

Would you like to change to this coverage? Yes No

Cancel or Exit Previous 9 Save & Continue

10 Submit

Changes submitted successfully.




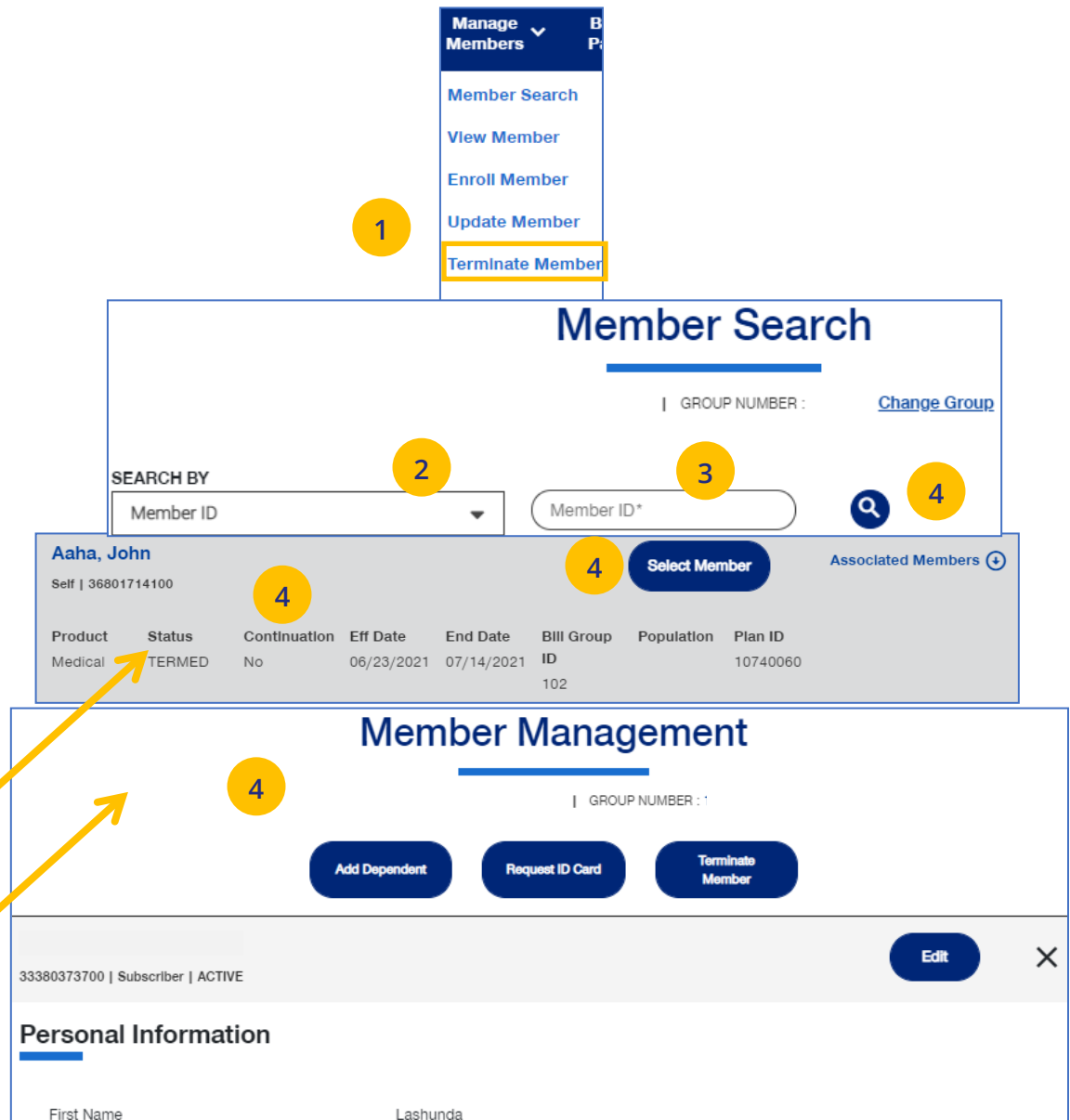
7 | Terminate a Member's Coverage

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

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

To search for and terminate a member:

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



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

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



7 | Terminate a Member's Coverage (continued)

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

Note: COBRA Termination – For COBRA Terminations, select **Discontinue COBRA** for the **Termination Reason**.

7. Enter the requested termination date in the **Requested Termination Date** field.

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

Help with Determining Date

The term date should be the last day of coverage. Example – if coverage runs through January and member should not have coverage in February, the term date is 1/31/XX. If there should be no coverage at all (delete coverage), then term date should be one day prior to coverage effective date. Example – if coverage began 2/1/XX and you need to delete the coverage entirely, term the member 1/31/XX.

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

Member Management

GROUP NUMBER :

Add Dependent Request ID Card **Terminate Member** 5

Louis Dylan Edit X

54867991300 | Subscriber | FUTURE

Personal Information

Terminate Member Benefits

GROUP NUMBER :

Reason for Termination

Termination Reason* 6 Select Reason

Requested Termination Date* 7 MM/DD/YYYY

Help with Determining Date

8

Waiting Period Rules

8

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



7 | Terminate a Member's Coverage (continued)

9. Scroll down to the **Member Information** section and click the **Select** box for each member whose coverage is being terminated.
10. Click **Next**. The **Terminate Member Benefits** screen displays, asking you to confirm that the information is correct.

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

Member Information

Multiple selections are allowed. Please select each applicable row.

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

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


10



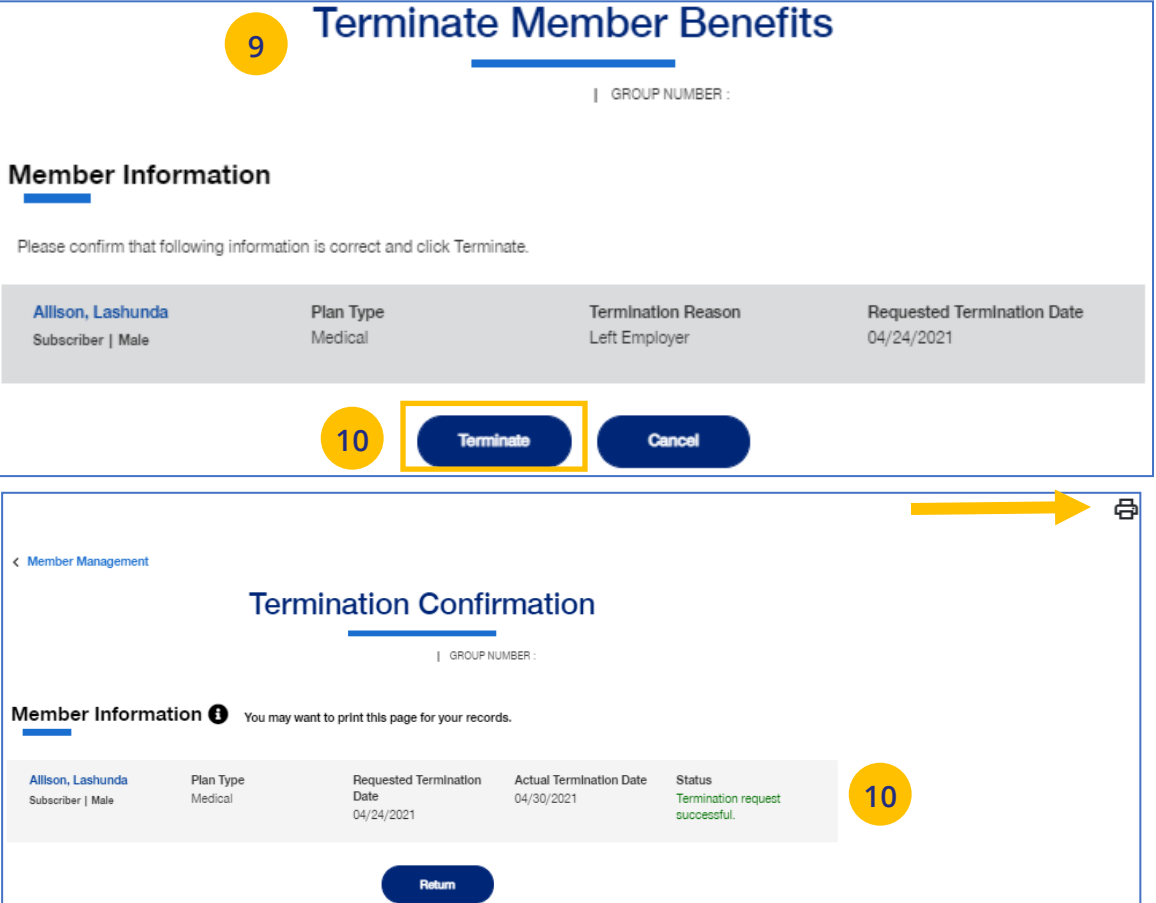
7 | Terminate a Member's Coverage (continued)

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

Note: Print Termination Confirmation

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

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



The image shows two screenshots from a web application. The top screenshot is titled "Terminate Member Benefits" and features a yellow circle with the number "9" in the top left. Below the title is a "GROUP NUMBER:" field. The "Member Information" section contains a table with the following data:

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

At the bottom of this screen, a yellow circle with the number "10" is next to a yellow-bordered box containing a "Terminate" button, with a "Cancel" button to its right.

The bottom screenshot is titled "Termination Confirmation" and features a yellow circle with the number "10" in the top right. It includes a "GROUP NUMBER:" field and a "Member Information" section with a message: "You may want to print this page for your records." The table below shows the updated status:

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

A "Return" button is located at the bottom center. A yellow arrow points to a print icon in the top right corner.



7 | Request a Health Plan ID Card


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

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

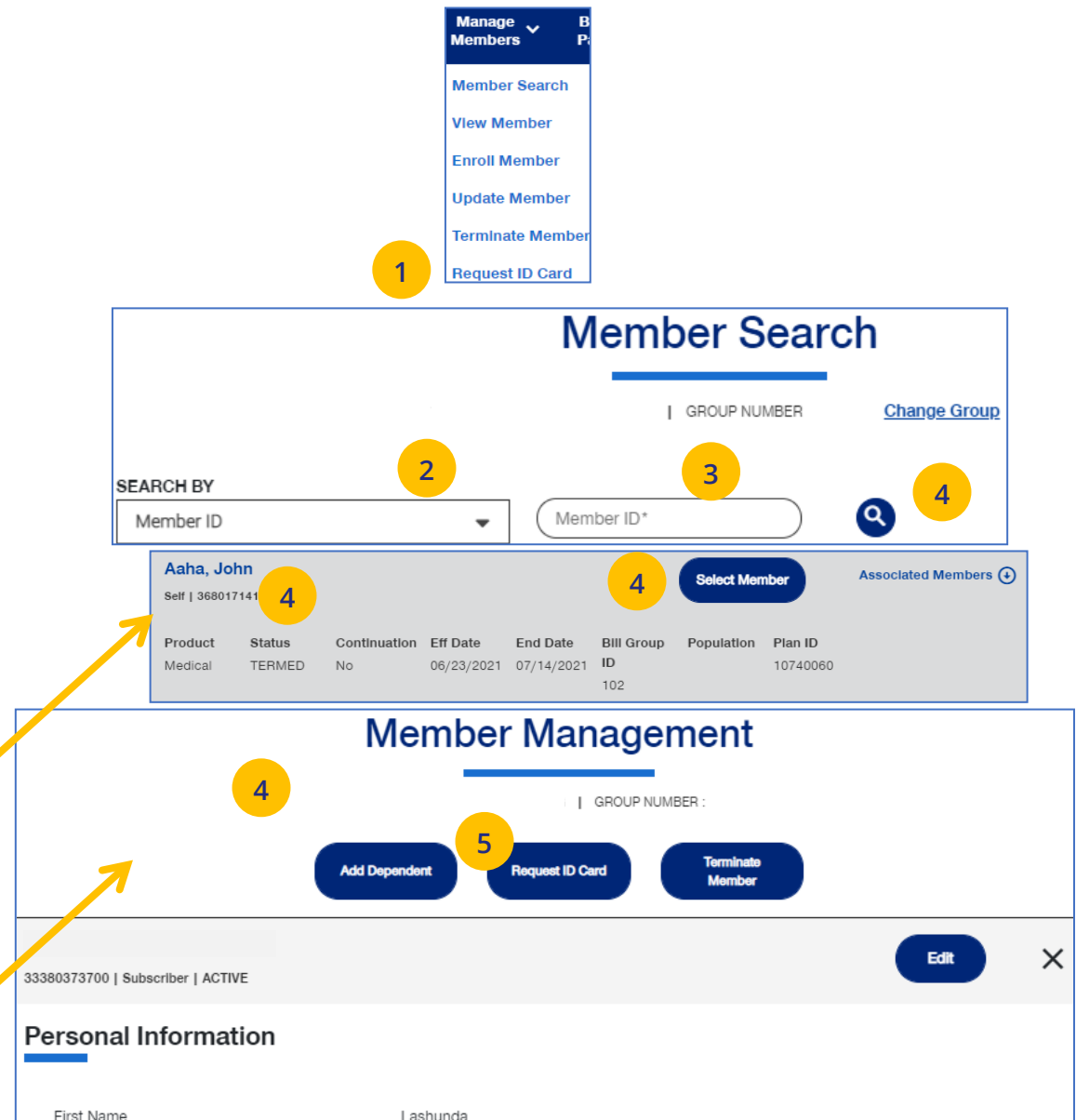
To Request an ID Card:

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

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

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

5. Click **Request ID Card**.



The screenshot shows the 'Member Search' and 'Member Management' screens. A 'Manage Members' dropdown menu is shown at the top with 'Request ID Card' selected (1). The 'Member Search' screen has a 'SEARCH BY' dropdown set to 'Member ID' (2) and a search input field containing 'Member ID*' (3). A search icon (4) is to the right. Below the search bar, a member card for 'Aaha, John' is displayed (4), with a 'Select Member' button (4). A table below the card shows member details:

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

The 'Member Management' screen shows the 'Request ID Card' button (5) and an 'Edit' button. Below, the 'Personal Information' section shows 'First Name' as 'Lashunda'.



7 | Request a Health Plan ID Card (continued)

- 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.

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

- John Doe
Subscriber
- Jane Doe
Spouse
- Jonathan Doe
Child
- Janet Doe
Child
- Jack Doe
Child

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

Request sent successfully.

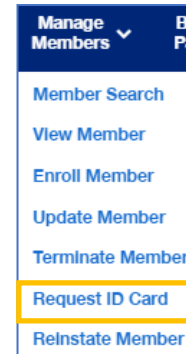


8 | Request Health Plan ID Cards for Entire Group (Level Funded Groups)

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.

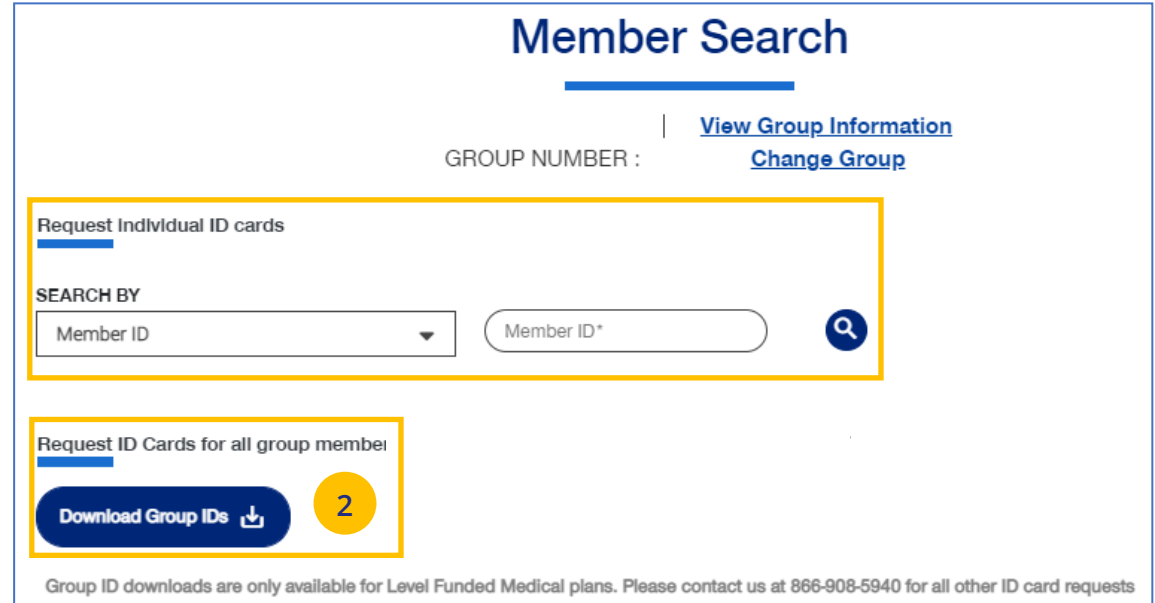
To Request Health Plan ID cards for an Entire Group (Level Funded Only)

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.



Manage Members ▾ | Bl Pa

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



Member Search

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

GROUP NUMBER :

Request Individual ID cards

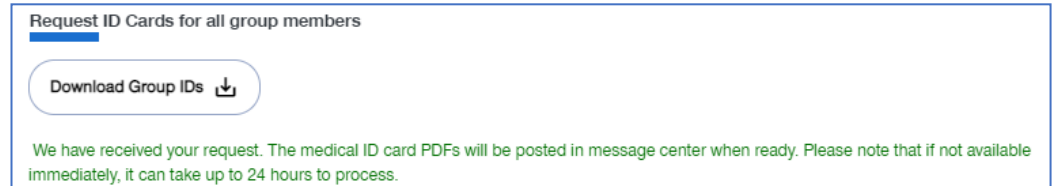
SEARCH BY

Member ID ▾ Member ID* 🔍

Request ID Cards for all group members

Download Group IDs ↓ 2

Group ID downloads are only available for Level Funded Medical plans. Please contact us at 866-908-5940 for all other ID card requests



Request ID Cards for all group members

Download Group IDs ↓


We have received your request. The medical ID card PDFs will be posted in message center when ready. Please note that if not available immediately, it can take up to 24 hours to process.

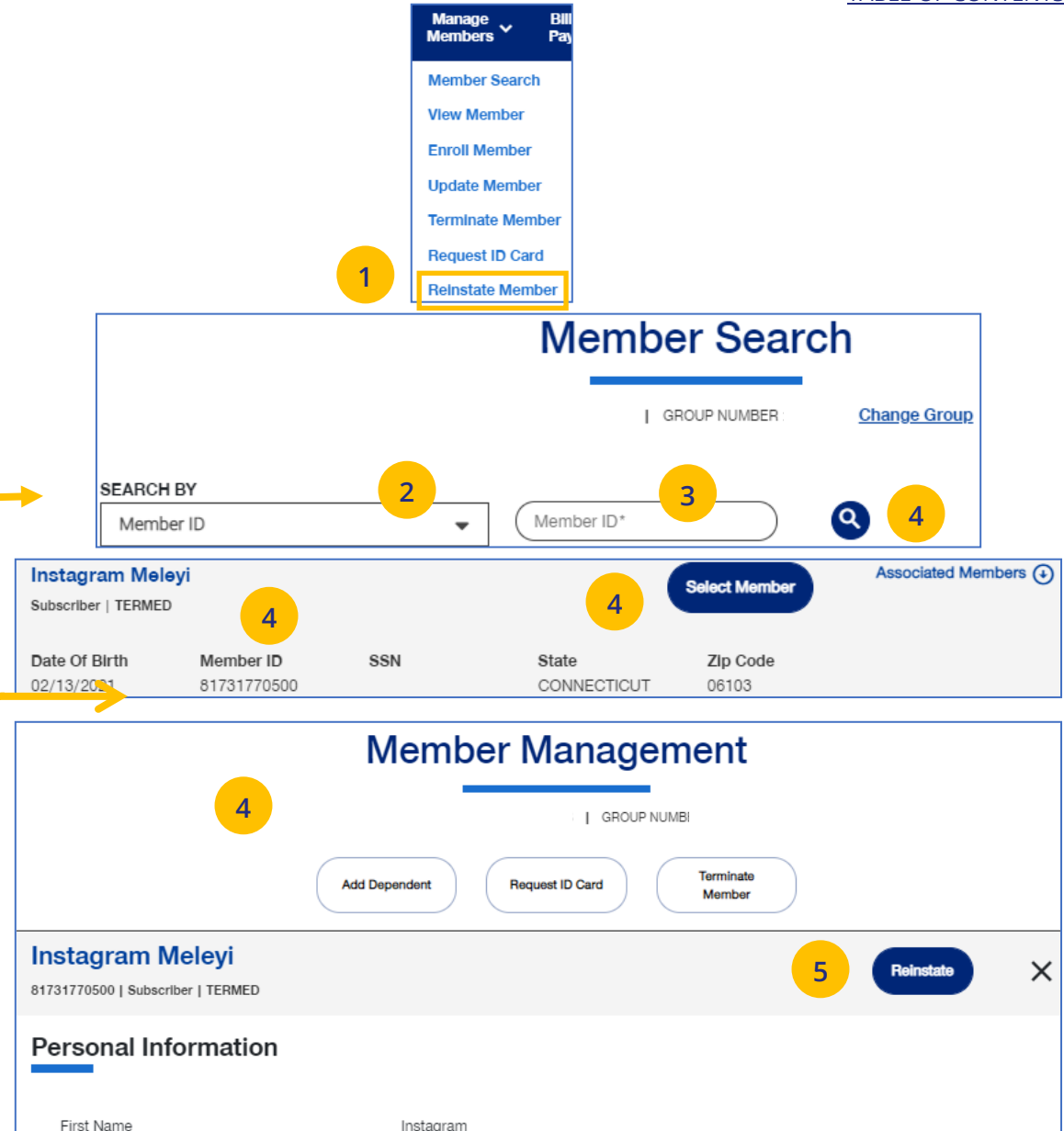


7 | Reinstate Member

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

To search for and reinstate a termed member:

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



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

Member Search: This section features a 'Manage Members' dropdown menu (1) with 'Reinstate Member' highlighted. Below it, the 'SEARCH BY' dropdown (2) is set to 'Member ID'. The search input field (3) contains 'Member ID*', and the search icon (4) is visible. A 'Change Group' link is also present.

Member Management: This section shows the details for 'Instagram Meleyi', a 'Subscriber | TERMED' member. A 'Select Member' button (4) is visible. Below the member name, a table displays personal information:

Date Of Birth	Member ID	SSN	State	Zip Code
02/13/2031	81731770500		CONNECTICUT	06103

Below the table, there are buttons for 'Add Dependent', 'Request ID Card', and 'Terminate Member'. At the bottom, the 'Reinstate' button (5) is highlighted, along with a close icon (X).



7 | Reinstate Member (continued)

- 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.

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

Reinstate Member

GROUP NUMBER :

1 Demographics 2 Coverage 3 Review & Submit

6

Reason For Enrollment

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

Reason for Enrollment *

Date of Qualifying Event *

Requested Effective Date *

Instagram Meleyi
Subscriber | TERMED

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

Subscriber Information

First Name*

Cancel Save and Continue

7



7 | Reinstate Member (continued)

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

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

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

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

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

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

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

Member Update

GROUP NUMBER :

Demographics Coverage Review & Submit

Updates saved successfully.

kath Bennett
Subscriber | ACTIVE

Coverage Effective Date

Requested Effective Date MM/DD/YYYY

Medical Information

Do you want to reinstate this coverage? Yes No

Billing Group * 1030902 - CT LIBERTY HMO GATED BASE PLAN

Plan * 10740060 - CT LIBERTY HMO GATED BASE PLAN | CT LIBERTY

Provider Effective Date 06/10/2021

Provider Type * PCP

Provider Location ID * 4576279 Find Provider

PCP 4576279

Cancel or Exit Previous Save & Continue

Submit

Changes submitted successfully.



8 | Billing & Payment

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

1. Click the **Billing & Payment** tab. The **Billing & Payment** selection screen displays.
2. You have two options:
 - o Click **Pay as Billed** to go through a series of screens to pay the bill, **or**
 - o Click **Go to Billing Home** to display the group's billing and payment information.

Note: Billing and Payment information for UnitedHealthcare HMO users is available on Employer eServices. Click the link on the Billing & Payment screen to go to Employer eServices.

Billing & Payment

HOSEMAN, INC. | GROUP NUMBER : 004284 [Change Group](#)

UnitedHealthcare HMO group Billing and Payment information is available on Employer eServices

[Click here to go to Employer eServices](#)



8 | Billing & Payment: Pay as Billed

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

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

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

Billing & Payment 1

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

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

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

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

Select Payment Options

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

Payment Method: PCM FRB

Date: 07/18/2023

Review & Submit 3



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

- Review the payment details and click **Submit Payment**. You will receive confirmation on your payment.

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

Review Payment Details

Payment Method	Amount	Date
PCM FRB	\$202,862.97	07/18/2023

Back
4
Submit Payment

Thank you for your payment! 4

Your payment information has been scheduled successfully. The confirmation number for this payment is 036710177560. Please click [Confirmation PDF](#) to save a record of this payment.

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

Group Name: PROSPECT CAPITAL MANAGEMENT LP
Group Number: 1248476
 Confirmation PDF

Total Payment: \$202,862.97
Confirmation Number: 036710177560
Payment Account: PCM FRB
Payment Submitted Date: 07/18/2023
Payment Date: 07/18/2023

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



8 | Billing & Payment: Go to Billing Home

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.

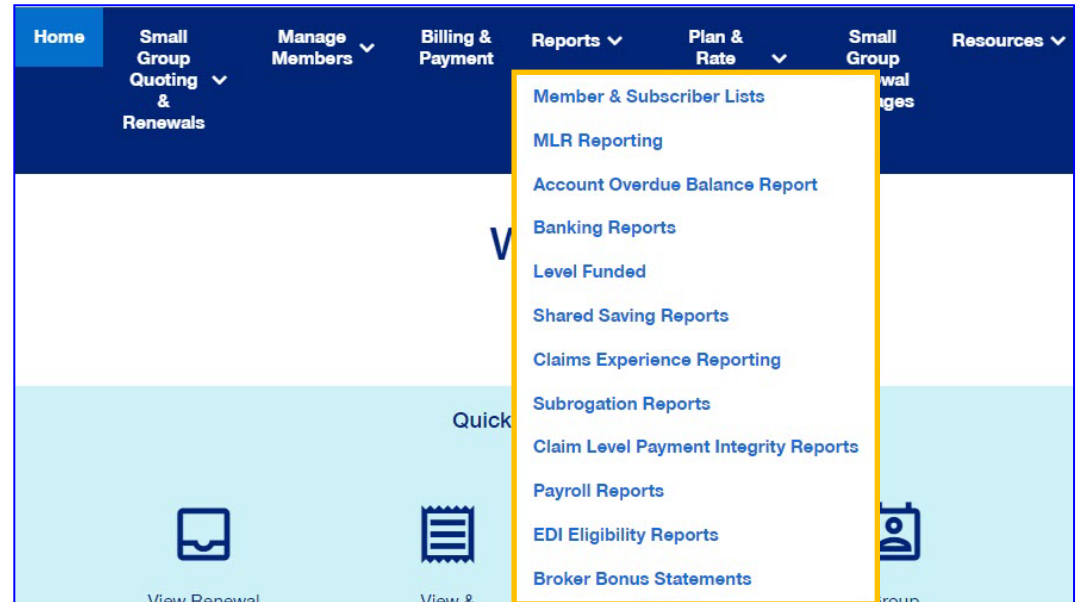
Pay	Invoice Date 1:	Invoice Number 1:	Due Date 1:	Policies	Bill Group 1:	Invoice Type 1:	Payment(s) Pending	Adjustment(s) Pending	Amount	Outstanding Balance
<input type="checkbox"/>	06/07/2023	327041109086	07/01/2023	210501	2211	List	Yes	No	\$17,819.35	\$17,819.35
<input type="checkbox"/>	06/07/2023	327001106772	07/01/2023	210501	2212	List	Yes	No	\$2,562.68	\$2,562.68
<input type="checkbox"/>	06/07/2023	327241100028	07/01/2023	210501	2213	List	Yes	No	\$63,773.37	\$63,773.37
<input type="checkbox"/>	06/07/2023	327811109816	07/01/2023	210501	2217	List	Yes	No	\$22,569.84	\$22,569.84
<input type="checkbox"/>	06/07/2023	432411439666	07/01/2023	210501	28201	List	Yes	No	\$11,134.81	\$11,134.81
<input type="checkbox"/>	06/07/2023	432061430089	07/01/2023	210501	28203	List	Yes	No	\$28,124.87	\$28,124.87
<input type="checkbox"/>	06/07/2023	432471432650	07/01/2023	210501	28207	List	Yes	No	\$10,232.41	\$10,232.41
<input type="checkbox"/>	06/07/2023	308481344971	07/01/2023	210501	1057822	List	Yes	No	\$25,405.68	\$25,405.68
<input type="checkbox"/>	06/07/2023	238380783321	07/01/2023	210501	1058208	List	Yes	No	\$21,240.16	\$21,240.16
Total									\$202,862.97	\$202,862.97



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.



9 | Member & Subscriber Lists

To generate the Member or Subscriber List:

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

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

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

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

- Member List or Subscriber List
- Status (All Including 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.

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

Member & Subscriber Lists

GROUP NUMBER : [Change Group](#)

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

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

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

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

1

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

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



9 | Member & Subscriber Lists (continued)

To generate the Member or Subscriber List:

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

Member & Subscriber Lists

| GROUP NUMBER : [Change Group](#)

Select the Listing	Select the Status	Select the As Of Date
Member List	ACTIVE	03/29/2022
Select the Population	Select the Billing Group	Select the Plan ID
ALL	ALL	ALL

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

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

Your request to download the report is successful. You will be notified in the Message Center when your report is complete.

United Healthcare 3 2 Laura Igna... Stage ENV



9 | Member & Subscriber Lists (continued)

4. Click on the bell icon to open **Message Center**.
5. Click on the plus sign.
6. Click on the attachment link to display the report.

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

The screenshot displays the United Healthcare Message Center interface. At the top, the United Healthcare logo is on the left, and a notification bell icon with a '4' is on the right. Below the header, the 'Message Center' title is centered. A 'SORT BY:' dropdown menu is set to 'Date Descending', and a 'Delete Selected' button is visible. A pagination bar shows '1' of 1 items. The message list below has one entry with a checkbox, date '2021-03-01 09:09:15.0', from 'SYSTEM', and subject 'Member Subscriber List'. A plus sign icon is next to this entry. The detailed message view below shows the same header information and a plus sign icon. The 'Attachments and Links' section contains a link to 'MembersListReport.xlsx', which is highlighted with a yellow box.

<input type="checkbox"/>	Date/Time	From	Subject
<input type="checkbox"/>	2021-03-01 09:09:15.0	SYSTEM	Member Subscriber List

<input type="checkbox"/>	Date/Time	From	Subject
<input type="checkbox"/>	2021-03-01 09:09:15.0	SYSTEM	Member Subscriber List

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

9 | MLR Reporting

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

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

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

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.

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

- Member & Subscriber Lists
- MLR Reporting**
- Account Overdue Balance Report
- Banking Reports
- Level Funded

MLR Reporting

[Change Broker](#)

3

Export as PDF | Export as Excel

1

3

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



9 | Account Overdue Balance Report

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

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

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

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



9 | Account Overdue Balance Report (continued)

To change your search criteria:

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

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

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

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

Account Overdue Balance Report

[Change Broker](#)

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

Select the Report Type: (4)

Report Date: (5)

Apply (6)

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

Download

Results (1)

< 1 >

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

Account Overdue Balance Report

[Change Broker](#)

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

No Termed Group reports available

Select the Report Type:

Report Date:



9 | Banking Reports

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

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

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

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

The screenshot shows the 'Banking Reports' page in a web application. At the top, a navigation bar contains several tabs: Home, Small Group Quote & Renewals, Manage Members, Billing & Payment, Plan Rate Information, Reports (highlighted with a yellow box and callout 1), Small Group, Commissions, and Resources. A dropdown menu for 'Reports' is open, showing options: Member & Subscriber Lists, MLR Reporting, Account Overdue Balance Report, Banking Reports (highlighted with a yellow box and callout 2), and Level Funded. Below the navigation bar, the main content area is titled 'Banking Reports' and includes a 'GROUP NUMBER' field. A message states: 'To view a banking report, Select from the report listed below.' There are three expandable sections: 'Daily Banking Reports', 'Monthly Banking Reports', and 'Historical Banking Reports'. The 'Daily Banking Reports' section is expanded and contains a table with two rows. The first row is 'Charge Claim Activity' with a 'Last Updated' date of '2020-12-14' and a 'File Link' icon (highlighted with a yellow box and callout 3). The second row is 'Funding Advice' with a 'Last Updated' date of '2020-12-08' and a 'File Link' icon with a PDF symbol. The 'Monthly Banking Reports' section shows 'No reports found'. At the bottom, there are two dropdown menus: 'Select the Report *' (set to 'Aged Outstanding') and 'Select the Date Range' (set to '12/14/2020 - 12/14/2020'), followed by an 'Apply' button.



9 | Banking Reports (continued)

Selecting Other Reports

You can generate and view different reports using the dropdown.

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

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

Below is a list of available reports and descriptions.

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



9 | Level Funded

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

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

Note: This report is for Level Funded groups only.

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

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

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

The screenshot shows the 'Level Funded Reports' interface. At the top, the 'Reports' tab is highlighted with a yellow box and a callout '1'. Below it, the 'Level Funded' option in the dropdown menu is highlighted with a yellow box and a callout '2'. The main content area shows a list of reports for group number 1373. The 'IRS Documents 6055' report is expanded, showing a 'File Link' button highlighted with a yellow box and a callout '3'. The 'Reconciliation Reports' section is also expanded, showing a table with columns for 'Type Of Report', 'Plan Year Start Date', 'Last Updated', and 'File Link'. The 'File Link' buttons in this table are highlighted with yellow boxes and a callout '3'. A yellow arrow points from the 'Early Term, Annual or Final' text in the instructions to the 'Reconciliation Reports' section.

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



9 | Shared Saving Reports


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.

The screenshot shows the 'Home View' of a system. At the top, a navigation bar includes 'Home', 'Small Group Quote & Renewals', 'Manage Members', 'Billing & Payment', 'Plan Rate Information', 'Reports', 'Small Group', 'Commissions', and 'Resources'. A yellow box labeled '1' highlights the 'Reports' dropdown menu, which is open and shows options like 'Member & Subscriber Lists', 'MLR Reporting', 'Account Overdue Balance Report', 'Banking Reports', 'Level Funded', 'Shared Saving Reports' (highlighted with a yellow box labeled '2'), 'Claims Experience Reporting', 'Subrogation Reports', and 'Claim Level Payment Integrity Reports'. Below the navigation bar, the 'Home View' displays 'SAMPLE GROUP' and 'GROUP NUMBER 1234567'. A section titled 'Shared Saving Reports' contains a 'GROUP NUMBER' field and links for 'View Group Information' and 'Change Group'. Below this, a message states 'To view a Shared Saving report, Select from the report listed below.' There are two report categories: 'Monthly Shared Saving Reports' (with a close button 'X') and 'Historical Shared Saving Report' (with a close button 'X' and a yellow box labeled '3'). Below these categories are two dropdown menus: 'Select Year' (set to '2021') and 'Select Month' (set to 'January'), followed by an 'Apply' button. At the bottom, a table displays report details:

Monthly Report Name	Report Date	Paid From Date	Paid To Date	File Link
Shared Savings Report	01/28/2022	12/01/2021	12/31/2021	 (highlighted with a yellow box labeled '4')

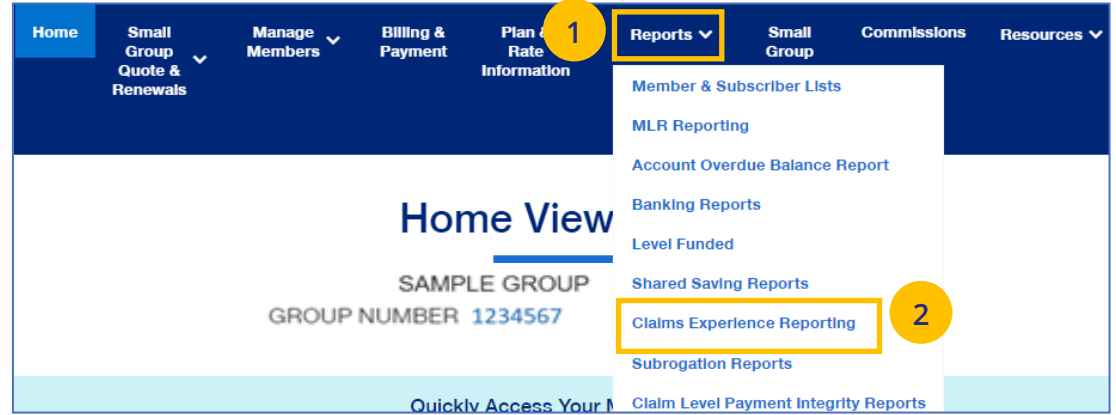


9 | Claims Experience Reporting

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

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

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



9 | Subrogation Reports

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

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

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

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

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

The screenshot displays the 'Subrogation Reports' page. At the top, a navigation bar includes 'Home', 'Small Group Quote & Renewals', 'Manage Members', 'Billing & Payment', 'Plan & Rate Information', 'Reports', 'Small Group', 'Commissions', and 'Resources'. The 'Reports' menu is open, showing options like 'Member & Subscriber Lists', 'MLR Reporting', 'Account Overdue Balance Report', 'Banking Reports', 'Level Funded', 'Shared Saving Reports', 'Claims Experience Reporting', 'Subrogation Reports', and 'Claim Level Payment Integrity Reports'. The 'Subrogation Reports' option is highlighted with a yellow box and a '2' callout. Below the navigation, the 'Home View' section shows 'SAMPLE GROUP' and 'GROUP NUMBER 1234567'. The 'Subrogation Reports' section features a 'GROUP NUMBER' field, a 'View Group Information' link, and a 'Change Group' link. A table lists reports with columns for 'Monthly Report Name', 'Last Updated', 'PHI', and 'File Link'. Two rows are shown, both with 'Subrogation Report' names and '2021-08-23' last updated dates. The first row has 'No' PHI, and the second has 'Yes' PHI. Both 'File Link' columns contain a document icon and are highlighted with yellow boxes and a '2' callout. At the bottom, there are two dropdown menus: 'Select the Report *' (set to 'Subrogation Report') and 'Select the Date Range *' (set to '01/13/2023 - 01/13/2023'), followed by an 'Apply' button.

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



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.

[TABLE OF CONTENTS](#)

The screenshot shows the UnitedHealthcare portal interface. At the top, there is a navigation menu with tabs: Home, Small Group Quote & Renewals, Manage Members, Billing & Payment, Plan & Rate Information, Reports (highlighted with a yellow box and a '1' in a yellow circle), Small Group, Commissions, and Resources. A dropdown menu is open under 'Reports', listing various report types: Member & Subscriber Lists, MLR Reporting, Account Overdue Balance Report, Banking Reports, Level Funded, Shared Saving Reports, Claims Experience Reporting, Subrogation Reports, and Claim Level Payment Integrity Reports (highlighted with a yellow box and a '2' in a yellow circle). Below the navigation, the main content area displays 'Home View' for 'SAMPLE GROUP' with 'GROUP NUMBER 1234567'. A 'Quickly Access Your' section is partially visible. Below this, the 'Claim Level Payment Integrity Reports' page is shown, featuring a 'GROUP NUMBER : ' field, a 'View Group Information' link, and a 'Change Group' link. A message states: 'To view a payment integrity report, Select from the report listed below.' Below this message, there are two dropdown menus: 'Select the Year' (set to 2021) and 'Select the Month' (set to August). A 'Download Report' button with a download icon is located to the right of these dropdowns, highlighted with a yellow box and a '4' in a yellow circle. A '3' in a yellow circle is positioned above the 'Select the Year' dropdown.



9 | Payroll Reports

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




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

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

The screenshot shows the top navigation bar with tabs: Home, Small Group Quote & Renewals, Manage Members, Billing & Payment, Plan Rate Information, Reports, Small Group, Commissions, and Resources. The 'Reports' tab is selected and highlighted with a yellow box and a circled '1'. A dropdown menu is open, listing various report categories. 'Payroll Reports' is highlighted with a yellow box and a circled '2'.

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

Latest Payroll Reports

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

The 'File Link' column in the first row is highlighted with a yellow box and a circled '3'.

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



9 | EDI Eligibility Reports

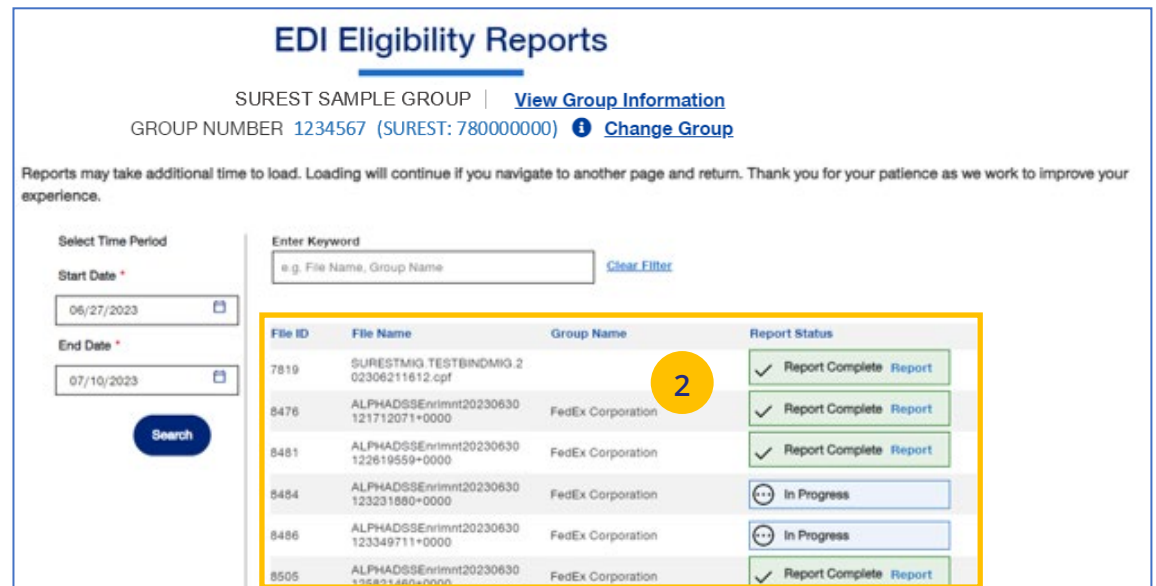
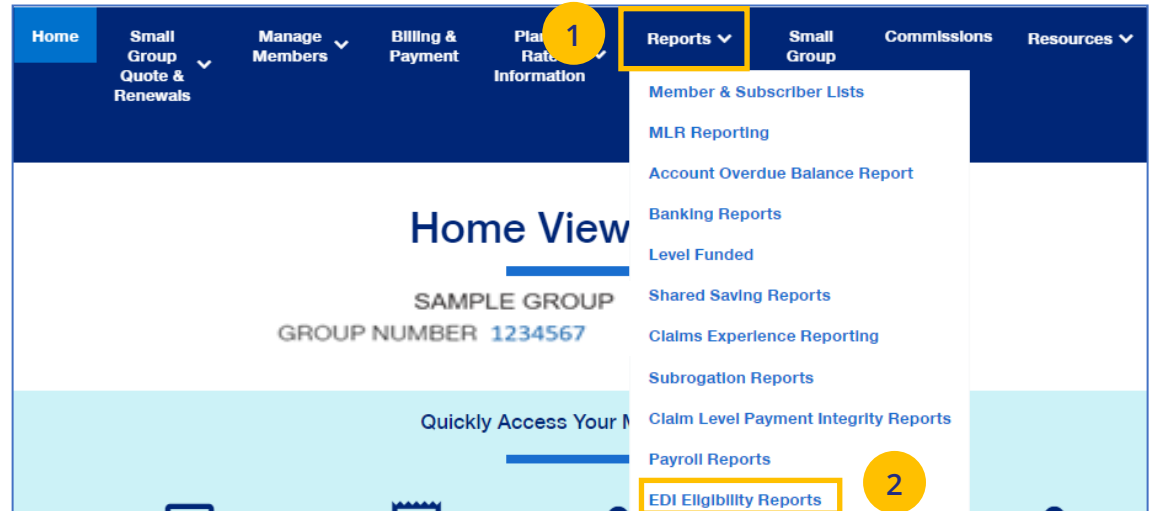
EDI Eligibility Reports are for groups that submit eligibility data electronically to UnitedHealthcare. The report shows the results of the data load.

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

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

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

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



9 | EDI Eligibility Reports (continued)

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

Below is a description of the sections of the report:

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

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

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

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

File ID	File Name	Group Name	Report Status
7819	SURESTMIG.TESTBINDMIG.2 02306211612.cpf		✓ Report Complete Report
8476	ALPHADSSEnrlnmt20230630 121712071+0000	FedEx Corporation	✓ Report Complete Report
8481	ALPHADSSEnrlnmt20230630 122619559+0000	FedEx Corporation	✓ Report Complete Report

Report Overview

SUREST SAMPLE GROUP | [View Group Information](#)
GROUP NUMBER 1234567 (SUREST: 78000000) | [Change Group](#)

File Completed

[Download Report](#)

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

Errors & Warnings

Errors 0	Warnings 0	Top Errors & Warnings This report contains no errors or warnings.
-------------	---------------	--

Detailed Updates and Errors

Added (23)
Errors (0)
Warnings (0)
Updated (0)
Terminated (0)
All (23)

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



10 | Plan & Rate Information

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

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

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

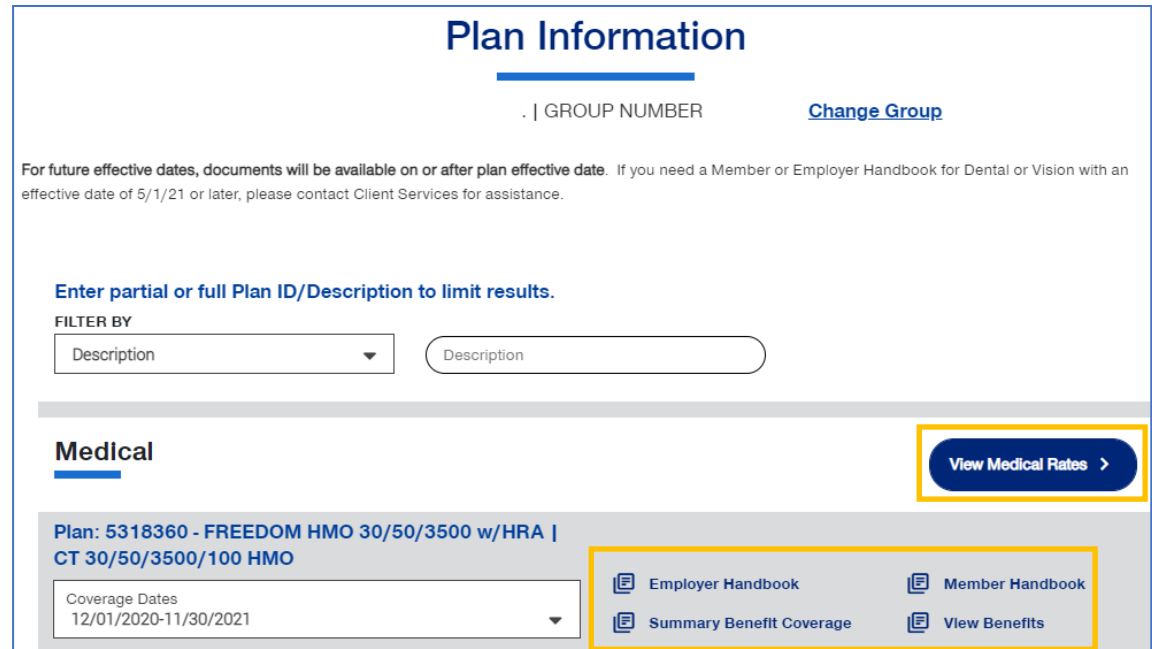
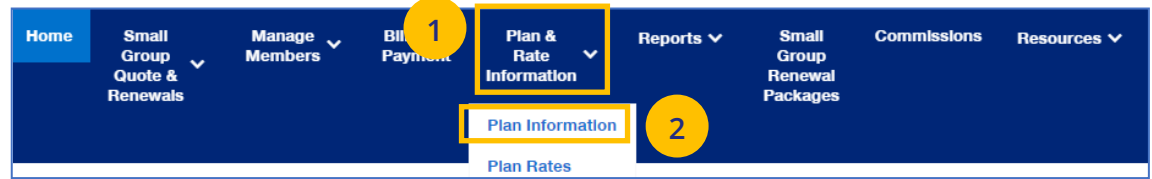
To View Plan Information:

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

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

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

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



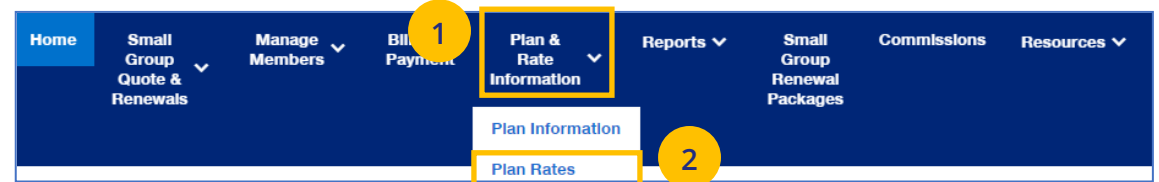
10 | Plan & Rate Information

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.



The screenshot shows the 'Plan Rates' screen. At the top, there is a 'Select Plan' link. The main heading is 'Plan Rates'. Below the heading, there is a 'Show Rates for Effective Date:' section with a dropdown menu set to 'All Dates' and three checkboxes: 'All Dates', '05/01/2021', and '01/01/2022'. To the right of this section are two buttons: 'Download PDF' and 'Print All Rates'. Below these buttons are three tabs: 'Medical Plans', 'Dental Plans', and 'Vision Plans'. The 'Medical Plans' tab is selected and highlighted with a yellow box. Below the tabs, the text 'Rates Effective 01/01/2022' is displayed. There are three tables, one for each plan:

Plan: 12527295 OPTION 3 NY G MTRO GT 25/40/1250/80 EPO 22	
Employee Tier	Premium / Month
Employee Only	\$926.58
Employee & Spouse	\$1,853.16
Employee & Child	\$1,575.19
Employee & Family	\$2,640.75

Plan: 7755086 OPTION 1 NY G LBTY NG 25/50/100 EPO ZD 22	
Employee Tier	Premium / Month
Employee Only	\$1,157.30
Employee & Spouse	\$2,314.60
Employee & Child	\$1,967.41
Employee & Family	\$3,298.31

Plan: 12608209 OPTION 4 NY S MTRO GT 30/80/3500/70 EPO 22	
Employee Tier	Premium / Month
Employee Only	\$770.15
Employee & Spouse	\$1,540.30
Employee & Child	\$1,309.26
Employee & Family	\$2,194.93



10 | View Benefits

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

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

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

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

Plan Information

| GROUP NUMBER : [Change Group](#)

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

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

FILTER BY

Description

Medical

[View Medical Rates >](#)

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

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

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



10 | Summary Benefit Coverage

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

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

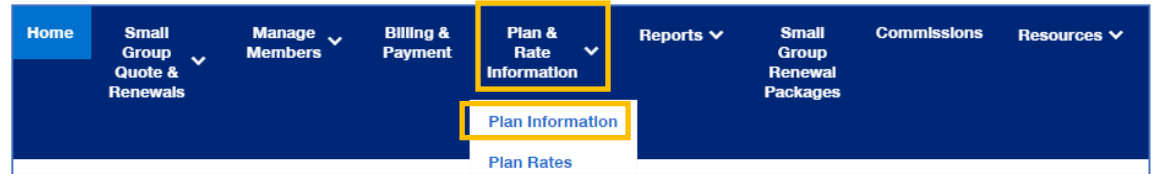
The screenshot displays the 'Plan Information' page. At the top, a dark blue navigation bar contains several menu items: 'Home', 'Small Group Quote & Renewals', 'Manage Members', 'Billing & Payment', 'Plan & Rate Information' (highlighted with a yellow box), 'Reports', 'Small Group Renewal Packages', 'Commissions', and 'Resources'. Below this, a sub-menu shows 'Plan Information' (highlighted with a yellow box) and 'Plan Rates'. The main content area is titled 'Plan Information' and includes a 'GROUP NUMBER' field and a 'Change Group' link. A notice states: 'For future effective dates, documents will be available on or after plan effective date. If you need a Member or Employer Handbook for Dental or Vision with an effective date of 5/1/21 or later, please contact Client Services for assistance.' Below this is a filter section: 'Enter partial or full Plan ID/Description to limit results.' with a 'FILTER BY' dropdown set to 'Description' and a search input field. The 'Medical' section is highlighted with a blue underline and includes a 'View Medical Rates >' button. The plan details are: 'Plan: 5318360 - FREEDOM HMO 30/50/3500 w/HRA | CT 30/50/3500/100 HMO'. A 'Coverage Dates' dropdown is set to '12/01/2020-11/30/2021'. To the right, there are four links: 'Employer Handbook', 'Member Handbook', 'Summary Benefit Coverage' (highlighted with a yellow box), and 'View Benefits'.



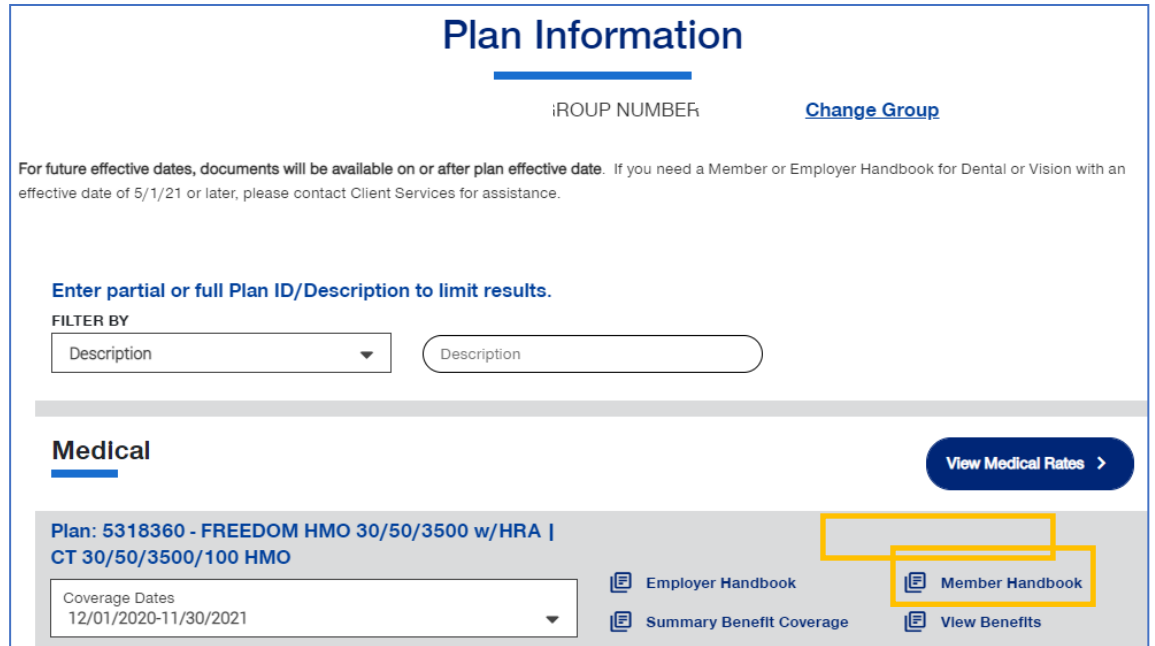
10 | Member Handbook

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

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



The navigation menu is dark blue with white text. The 'Plan & Rate Information' menu item is highlighted with a yellow box. Below it, a sub-menu is visible with 'Plan Information' and 'Plan Rates' items, both also highlighted with yellow boxes.

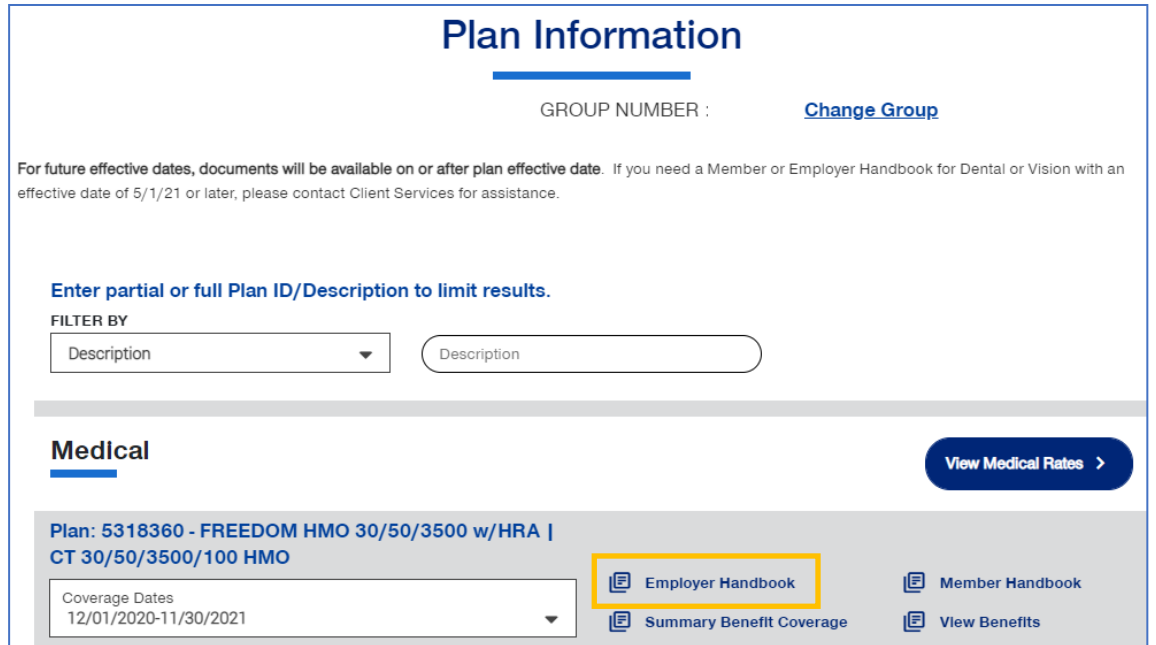
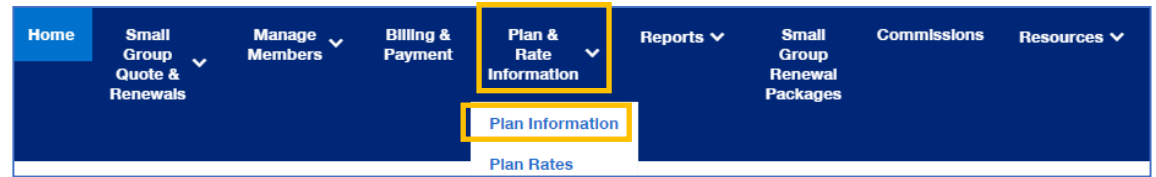


The screenshot shows the 'Plan Information' page. At the top, there's a title 'Plan Information' and a 'GROUP NUMBER' field with a 'Change Group' link. A notice states: 'For future effective dates, documents will be available on or after plan effective date. If you need a Member or Employer Handbook for Dental or Vision with an effective date of 5/1/21 or later, please contact Client Services for assistance.' Below this is a filter section: 'Enter partial or full Plan ID/Description to limit results.' with a 'FILTER BY' dropdown set to 'Description' and a search input field. Under the 'Medical' section, there's a 'View Medical Rates' button and a plan entry: 'Plan: 5318360 - FREEDOM HMO 30/50/3500 w/HRA | CT 30/50/3500/100 HMO'. A 'Coverage Dates' dropdown is set to '12/01/2020-11/30/2021'. To the right, there are four links: 'Employer Handbook', 'Member Handbook' (highlighted with a yellow box), 'Summary Benefit Coverage', and 'View Benefits'.



10 | Employer Handbook

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



11 | Resources

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

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

The screenshot displays the UnitedHealthcare portal interface. At the top, a dark blue navigation bar contains several menu items: Home, Small Group Quote & Renewals, Manage Members, Billing & Payment, Plan & Rate Information, Reports, Small Group Renewal Packages, and Commissions. The 'Resources' menu is expanded, showing a list of options: Benefit Summaries & SBCs, Forms, Product Grids and Network Documents, Marketing Materials, Find a Provider, Training Materials, Employee Engagement Planner, Upload Documents, View Uploaded Documents, and Other Applications. The main content area features a light blue background with the text 'Welcome, Louis' and a 'Select Group' button. Below this, a light blue banner reads 'Quickly Access Your Management Tools'.



11 | Benefit Summaries & SBCs

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

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

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

The screenshot shows the user interface for the 'Benefit Summaries & SBCs' section. At the top, a dark blue navigation bar contains links for Home, Small Group Quote & Renewals, Manage Members, Billing & Payment, Plan & Rate Information, Reports, Small Group Renewal Packages, Commissions, and Resources. A yellow circle with the number '1' highlights the 'Benefit Summaries & SBCs' link in the Resources dropdown menu. Below the navigation bar, a light blue banner displays 'Welcome, Louis' and a 'Select Group' button. A section titled 'Quickly Access Your Management Tools' is also visible. The main content area is titled 'Benefit Summaries & SBCs' with a yellow circle and the number '1' next to it. Below the title, a row of filter buttons is shown: 'Medical & Pharmacy' (highlighted with a yellow box), 'Dental', 'Vision', and 'STD, LTD, Life'. A yellow circle with the number '2' is placed to the right of these buttons. Below the filters, a text block instructs users to select from required fields to find a document. To the left, a 'Filter Documents' sidebar contains dropdown menus for 'Funding Type*' and 'State*', and a text input field for 'Medical Plan Code'. A 'Search' button is located at the bottom of this sidebar. To the right, a 'Search to Display Results' section features a magnifying glass icon and the text: 'We're ready to find what you're looking for!' and 'Enter your search criteria in the sidebar to the left, and we'll display the relevant results here for you to browse, download, or print.'



11 | Benefit Summaries & SBCs (continued)

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

Medical & Pharmacy [36] De

To find a Benefit Summary or SBC (Summary of Benefits and Coverage) for Middle Market Medical and RX plan combin

Filter Documents

Funding Type*
Fully Insured

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

State*
Alabama

Plan Year*
2021

Medical Plan Code
AU8M

Search 3

Filter Documents

Funding Type*
Level Funded

Product Type*
UnitedHealthcare Level Funded

State*
Alabama

Effective Date*
08/01/2022

Coverage Type*
Family

Your Search Returned 11624 Documents

3

Enter keyword to filter Results
ex: Plan Code , Plan Description (3 character) [Clear Filter](#)

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

4



11 | Forms

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

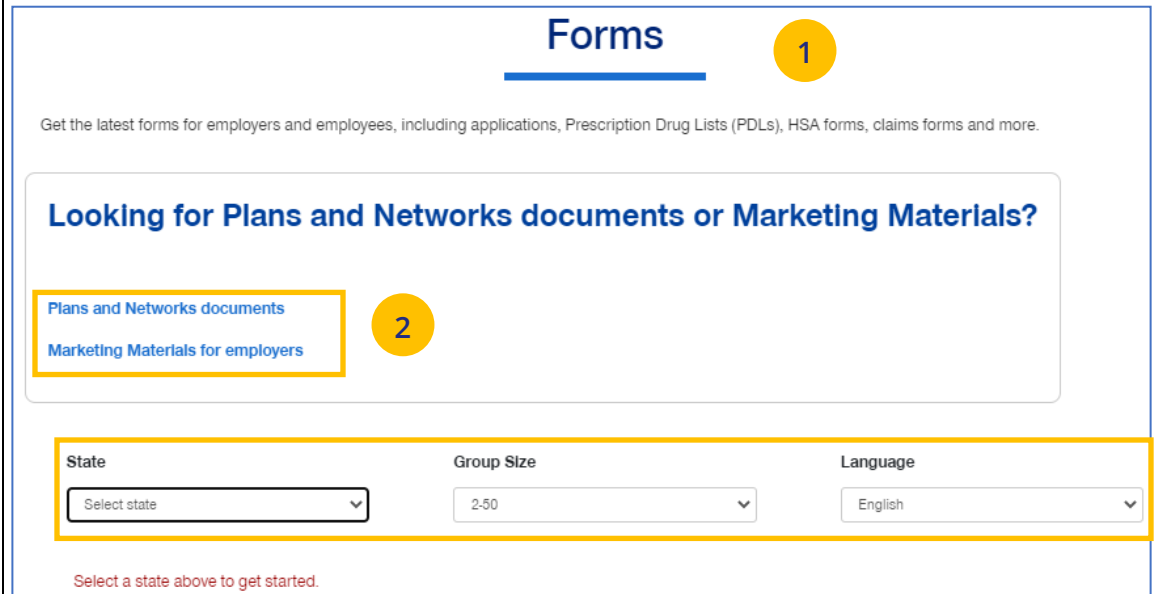
1. Click the **Forms** link. The **Forms** screen displays.
2. You can click on the links for (1) **Plans and Networks Documents** or (2) **Marketing Materials for employers**, or (3) select a state to access forms for that state. In addition to State, you can also select a Group Size.

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.



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



Forms

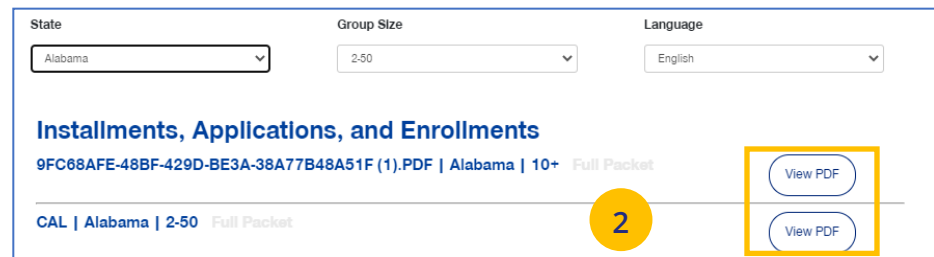
Get the latest forms for employers and employees, including applications, Prescription Drug Lists (PDLs), HSA forms, claims forms and more.

Looking for Plans and Networks documents or Marketing Materials?

Plans and Networks documents
Marketing Materials for employers

State: Select state Group Size: 2-50 Language: English

Select a state above to get started.



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

Installments, Applications, and Enrollments

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

CAL | Alabama | 2-50 Full Packet **View PDF**



11 | Product Grids and Networks Documents

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

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

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

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

The screenshot shows the United HealthCare Services website interface. At the top, there is a dark blue navigation bar with various menu items. A dropdown menu for 'Resources' is open, highlighting 'Product Grids and Network Documents'. Below the navigation bar, the main content area displays 'Welcome, Louis' and 'Quickly Access Your Management Tools'. The 'Product Grids and Network Documents' page is shown, featuring a search bar with a link to 'Benefit Summaries or SBC's click here.' and filters for Plan Year (2023), State (Select state), and Group Size (2-50). A 'View PDF' button is highlighted for the selected plan: RENPKG | Alabama | 2-50 | 2022.



11 | Marketing Materials

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

1. Click the **Marketing Materials** link. The **Marketing Materials** screen displays.
2. You can (1) access the Employee Engagement Planner 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

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

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

Note: The screens will vary based on your selection:

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

Find a Provider: Oxford

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



11 | Find a Provider (continued)

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

What location do you want to find a provider in?

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

4

CONTINUE

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

Birmingham, AL
[CHANGE LOCATION](#)

5

Search by provider, service, or condition

SEARCH

CHOICE PLUS CHANGE PLAN >

[←](#) Results for **All Primary Care Providers** 5 [NEW SEARCH](#)
Office Visit - Primary Doctor - Established Patient - Low Complexity [VIEW MAP](#)
Total average cost in your area: \$44 - \$69

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


Filter Results by Provider Name **FILTER**

Refine Results

Changing a search results filter will reload the page immediately.

LOCATION

WHERE
Birmingham, AL

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

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

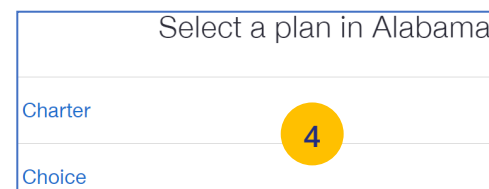
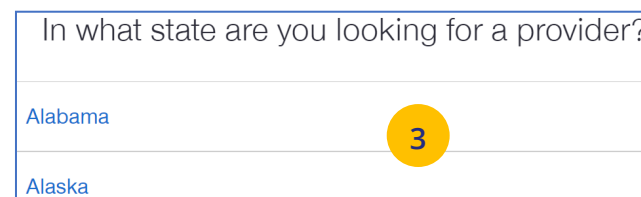
Any cost information on this page is an estimate only. See more information below about participating providers, available services and these estimates.



11 | Find a Provider (continued)

Find A Provider: Level Funded

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



11 | Find a Provider (continued)

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

What location do you want to find a provider in?

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

5

[CONTINUE](#)

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

Birmingham, AL
[CHANGE LOCATION](#)

6

Search by provider, service, or condition [SEARCH](#)

CHOICE PLUS CHANGE PLAN >

[←](#) Results for **All Primary Care Providers** 6 [NEW SEARCH](#)
Office Visit - Primary Doctor - Established Patient - Low Complexity [VIEW MAP](#)
Total average cost in your area: \$44 - \$69

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


Filter Results by Provider Name [FILTER](#)

Refine Results

Changing a search results filter will reload the page immediately.

LOCATION [-](#)

WHERE
Birmingham, AL

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

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

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



11 | Find a Provider (continued)

Find A Provider: UnitedHealthcare HMO

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

The screenshots illustrate the following steps:

- Step 1:** A navigation menu with 'Resources' and 'Commissions' tabs. The 'Find a Provider' option is highlighted with a yellow box and a yellow circle containing the number 1.
- Step 2:** The 'Provider Search' screen displays three network options: 'Oxford & Oxford Level Funded', 'UnitedHealthcare Level Funded', and 'UnitedHealthcare HMO'. The 'UnitedHealthcare HMO' option is selected, indicated by a yellow circle with the number 2.
- Step 3:** A screen titled 'To search for doctors, clinics or facilities, choose the state where you live'. It shows four state icons: California, Oklahoma, Oregon, and Washington. The California icon is selected, indicated by a yellow circle with the number 3.
- Step 4:** A screen titled 'Select a network in California'. It shows two network options: 'SignatureValue Advantage HMO' and 'SignatureValue Alliance HMO'. The 'SignatureValue Advantage HMO' option is selected, indicated by a yellow circle with the number 4.

12 | Find a Provider (continued)



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

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

5

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

Los Angeles, CA
[CHANGE LOCATION](#)

Search by provider, service, or condition **6**

CHOICE PLUS CHANGE PLAN >

[<](#) Results for **All Primary Care Providers** **6** [NEW SEARCH](#)

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

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

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


Filter Results by Provider Name

Refine Results

Changing a search results filter will reload the page immediately.

LOCATION

WHERE

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

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

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



11 | Find a Provider (continued)

Find A Provider: UnitedHealthcare Freedom Plans

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

Resources ^ Commissions App

Benefit Summaries & SBCs

Forms

Product Grids and Network Documents

Marketing Materials

Find a Provider 1

Provider Search

United Healthcare Oxford
Oxford & Oxford Level Funded

United Healthcare
UnitedHealthcare Level Funded

United Healthcare
UnitedHealthcare HMO

United Healthcare
United Healthcare Freedom Plans 2

United Healthcare
UnitedHealthcare Fully Insured

United Healthcare
United Behavioral Health

What plan are you looking for?

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

Individual and Family State Exchanges

All Savers Health Plans 3

Charter / Charter Balanced



11 | Find a Provider (continued)

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

Which type of Health Insurance Marketplace?

This website is not the Health Insurance Marketplace website. This website is designed to provide you with resources to help you find network providers.



Individual and Family
Choose this for yourself or your dependents



SHOP (Small Business Health Options Program)
Choose this for your business



In which state do you live?

Arizona 

Maryland

Massachusetts

Select a network in Arizona

AZ Compass HMO 



AZ Compass HMO



11 | Find a Provider (continued)

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

What location do you want to find a provider in?

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

Street Address, City & State, Zip Code

Continue

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

Los Angeles, CA
CHANGE LOCATION

Search by provider, service, or condition

SEARCH

Search Results

Search by provider, service, or condition

Search

Refine Results

Changing a search results filter will reload the page immediately.

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

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

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

Federally Qualified **Health Center (FQHC)**
Specialty



11 | Find a Provider (continued)

Find A Provider: UnitedHealthcare Fully Insured

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

The screenshot shows the top navigation bar with 'Resources' and 'Commiss'. Below is a list of menu items: 'Benefit Summaries & SBCs', 'Forms', 'Product Grids and Network', 'Marketing Materials', and 'Find a Provider'. The 'Find a Provider' item is highlighted with a yellow box and a yellow circle containing the number '1'. To the right is the 'Provider Search' section with a grid of plan options, each with the UnitedHealthcare logo and a name: 'Oxford & Oxford Level Funded', 'UnitedHealthcare Level Funded', 'UnitedHealthcare HMO', 'United Healthcare Freedom Plans', 'UnitedHealthcare Fully Insured', and 'United Behavioral Health'. A yellow circle with the number '2' is placed over the 'UnitedHealthcare Fully Insured' option.

The screenshot shows a decision screen with the title 'Are you a current UHC member or are you shopping for a health plan?'. There are two circular buttons: one with a medical cross icon labeled 'UHC Member' with the subtext 'You have UnitedHealthcare', and one with a shopping cart icon labeled 'Shopping Around' with the subtext 'View your UHC plan options'. A yellow circle with the number '3' is placed over the 'Shopping Around' button.

The screenshot shows a section titled 'What plan are you looking for?' with the instruction 'You will find your plan name on the bottom-right corner of your member ID card.' Below the title is a list of plan types: 'Individual and Family State Exchanges', 'All Savers Health Plans', and 'Charter / Charter Balanced'. A yellow circle with the number '4' is placed over the 'All Savers Health Plans' option.



11 | Find a Provider (continued)

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

What location do you want to find a provider in?

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

Street Address, City & State, Zip Code

Continue

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

Los Angeles, CA
CHANGE LOCATION

Search by provider, service, or condition

SEARCH

Search Results

Search by provider, service, or condition

Search

Refine Results

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

Changing a search results filter will reload the page immediately.

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

Federally Qualified **Health Center (FQHC)**
Specialty

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



11 | Find a Provider (continued)

Find A Provider: United Behavioral Health

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

The screenshot displays the 'Provider Search' interface. At the top, a navigation menu includes 'Resources' and 'Commissions'. A dropdown menu is open under 'Resources', with 'Find a Provider' highlighted and marked with a yellow circle and the number '1'. Below the navigation, there are several United Healthcare logos, with 'United Behavioral Health' marked with a yellow circle and the number '2'. The main section is titled 'Find a Provider' and contains the text 'Find therapists, psychiatrists, or other clinics in your network.' Below this is a search bar with the placeholder text 'Enter provider name, keyword or leave blank' and a location field set to 'Eden Prairie, MN 55344'. A yellow circle with the number '3' is placed over the search bar. A 'Search' button is located to the right of the search bar. Below the search bar, there is a section for 'Refine Results' with options for 'Sort By' (Distance) and 'Within' (25 Miles). The search results show two providers: Leah Willett and Melanie Vankuiken, both BCBA Board Certified Behavioral Analysts. A yellow circle with the number '3' is placed over the first provider's details.



11 | Find a Provider (continued)

Find A Provider: Prescription Drug Lists

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

The screenshot shows a website interface with a blue header containing 'Resources' and 'Commisslor'. A left sidebar lists categories: 'Benefit Summaries & SBCs', 'Forms', 'Product Grids and Network D...', and 'Marketing Materials'. The 'Find a Provider' link is highlighted with a yellow box and a yellow circle containing the number '1'. The main content area is titled 'Provider Search' and displays a grid of United Healthcare logos with plan names: 'Oxford & Oxford Level Funded', 'UnitedHealthcare Level Funded', 'UnitedHealthcare HMO', 'United Healthcare Freedom Plans', 'UnitedHealthcare Fully Insured', and 'United Behavioral Health'. The 'Prescription Drug Lists' link is highlighted with a yellow circle containing the number '2'. Below this, a section titled 'Prescription Drug Lists' includes a sub-section 'Check your PDL to stay updated on your pharmacy coverage' with a 'Sign in to view the PDL for your plan' button and a 'Select your plan to sign in' dropdown. A yellow circle with the number '3' is placed over the 'Prescription Drug Lists' link in the left sidebar.



11 | Training Materials

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

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

The screenshot displays the application's navigation bar with options: Home, Small Group Quote & Renewals, Manage Members, Billing & Payment, Plan & Rate Information, Reports, Small Group Renewal Packages, Commissions, and Resources. The Resources dropdown menu is open, showing options like Benefit Summaries & SBCs, Forms, Product Grids and Network Documents, Marketing Materials, Find a Provider, Training Materials (highlighted with a yellow box and a '1' in a yellow circle), Employee Engagement Planner, and Upload Documents. Below the navigation bar, a central message says 'Welcome, Louis' with a 'Select Group' link. A light blue bar below that says 'Quickly Access Your Management Tools'. The main content area is titled 'Training Materials' with a '1' in a yellow circle. Below the title is a search bar with the text: 'Find resources to assist you in utilizing uhceservices, SAMx and SAMx - Level Funded, including guides, presentations, and videos.' Below the search bar are four dropdown menus: 'Select a Brand' (Please Select), 'Select a State' (Please Select), 'Select a Product Type' (Please Select), and 'Select a Group Size' (Please Select). A yellow box highlights these filters, with a '2' in a yellow circle. Below the filters is a red text prompt: 'Select filters above to get started.' Below this is a second set of filters where 'UnitedHealthcare' is selected for Brand, 'Alabama' for State, 'Medical' for Product Type, and '2-50' for Group Size. A '2' in a yellow circle is placed over the Product Type dropdown. Below the filters is a section titled 'Training Internal' with two items: 'SAMx' and 'uhceservices.com', each with a dropdown arrow.



11 | Employee Engagement Planner

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

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

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

11 | Employee Engagement Planner (continued)



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

Calendar 3

MILESTONES BEHAVIORAL SERVICES INC. | GROUP NUMBER : 1048476 [Change Group](#)

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

Add New Calendar

MILESTONES B...
JUN01'21-UHC

today
June 2021

month
week
day

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

Select Brand

- UnitedHealthcare
- Oxford
- UnitedHealthcare Level Funded

Select Effective Date

Please Select

When selecting multiple filter options, select Apply.

Apply
Reset



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

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

View All Topics 4

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

Before the Plan Begins

- Waiting for Coverage to Start
- Getting Started Checklist

Help Employees Understand Their Plan

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

Welcome Employees

- Welcome Brochure
- Premium Designation Program
- OptumRx®

Seasonal Reminders

- Flu Shots
- Annual Checkups

View All Topics Category

Filter Options

Category Type

Brochure

Email

Flier

Select All

Product Brand

UnitedHealthcare

Oxford

UnitedHealthcare Level Funded

States

Connecticut

New York

New Jersey

Select All

Before the Plan Begins

UHC New Member Checklist

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

Choose a Communication Type:

4

UHC Waiting For Coverage to Start

Actions your employees can take before their health plans begin.

Choose a Communication Type:

Oxford New Member Checklist

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

Choose a Communication Type:



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.

The screenshot shows the 'Home View for Louis' dashboard. The top navigation bar includes links for Home, Small Group Quote & Renewals, Manage Members, Billing & Payment, Plan & Rate Information, Reports, Small Group Renewal Packages, Commissions, and Resources. The 'Resources' dropdown menu is open, showing options like Benefit Summaries & SBCs, Forms, Product Grids and Network Documents, Marketing Materials, Find a Provider, Training Materials, Employee Engagement Planner, **Upload Documents** (highlighted with a yellow box and a '1' in a yellow circle), View Uploaded Documents, and Other Applications. Below the navigation is a 'Quickly Access Your Management Tools' section with a '1' in a yellow circle. The main content area is titled 'Upload Documents' and includes a 'GROUP NUMBER' field with a 'Change Group' link. A message states: 'Please select a document name and browse your computer for your file. You may upload five documents at a time.' Below this is a 'Document Name *' dropdown menu with 'Select One' and a 'Select Document for Upload *' file selection area with 'No file chosen...'. There are 'Clear Selections' and 'Upload' buttons, and an 'Add Row (+)' button. At the bottom, there is a link to check verification and a note about processing time.



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.

Document Name * **Select One** ▼

- Select One
- Annual Certification
- Binder Check Payments and Paper Group Submission
- Common Law Employee Attestation
- Common Ownership Certification Form
- Employer Information Form**
- Healthy NY Recertification
- Miscellaneous
- Professional Employer Association Certification Form

Document Name * 1099 Attestation Form ▼

Select Document for Upload * Decision 2.jpg

Add Row +

Document Name * 1099 Attestation Form ▼

Select Document for Upload * Decision 2.jpg

Clear Selections **Upload**

Add Row +

Document Name * 1099 Attestation Form ▼

Select Document for Upload * Decision 2.jpg

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

Clear Selections **Add Row** +



11 | View Uploaded Documents

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

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

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

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

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

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

The screenshot shows the 'View Uploaded Documents' page. At the top, a navigation bar includes 'Home', 'Small Group Quote & Renewals', 'Manage Members', 'Billing & Payment', 'Plan & Rate Information', 'Reports', 'Small Group Renewal Packages', 'Commissions', and 'Resources'. The 'Resources' dropdown menu is open, showing options like 'Benefit Summaries & SBCs', 'Forms', 'Product Grids and Network Documents', 'Marketing Materials', 'Find a Provider', 'Training Materials', 'Employee Engagement Planner', 'Upload Documents', and 'View Uploaded Documents' (highlighted with a yellow box and a '1' callout).

The main content area is titled 'View Uploaded Documents' (with a '1' callout). It features three search filters: 'Select the Document Name' (set to 'All'), 'Select the Date Range' (set to '04/21/2022 - 04/22/2022'), and 'Enter the Group ID' (with a 'Group ID' placeholder). A blue 'Apply' button (with a '2' callout) is highlighted with a yellow box.

Below the filters is a table with two rows of data. The first row has columns for 'Group ID', 'Ingestion Date' (2022-04-21), 'Federal Tax ID', 'Uploaded By', and 'Document Name' (MISCELLANEOUS). A 'Download' button (with a '3' callout) is highlighted with a yellow box. The second row has the same columns, with 'Document Name' set to 'WAGE AND TAX FORM'. A 'Download' button is also highlighted with a yellow box.

At the bottom, a 'Download Report' button (with a download icon) is highlighted with a yellow box. Below it, a green message states: 'Your request to download the report is successful. You will be notified in the Message Center when your report is complete.'



11 | Other Applications

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

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

Home View for Louis

Select Group

Quickly Access Your Management Tools

Other Applications

Other Applications

1

United eServices (UeS)

United Healthcare

Market	Alabama, Alaska, Arizona, Arkansas, California, Colorado, Connecticut, Delaware, Florida, Georgia, Hawaii, Idaho, Illinois, Indiana, Iowa, Kansas, Kentucky, Louisiana, Maine, Maryland, Massachusetts, Michigan, Minnesota, Mississippi, Missouri, Montana, Nebraska, Nevada, New Hampshire, New Jersey, New Mexico, New York, North Carolina, North Dakota, Ohio, Oklahoma, Oregon, Pennsylvania, Rhode Island, South Carolina, South Dakota, Tennessee, Texas, Utah, Vermont, Virginia, Washington, West Virginia, Wisconsin, Wyoming	Product	Basic Life, Dental, Long Term Disability(LTD), Medical Short Term Disability(STD), Vision
Carrier	UnitedHealthcare	Functionality	EEMS, Facets Commission Statements, Franchise Quoting (ACEC, AHP), Quoting, Renewal Packages, SAM
Funding Type	Fully Insured		

Go to United eServices

Employer eServices



12 | Commissions

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

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

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

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

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

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

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



Appendix: Broker Roles and Permissions

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



Appendix: Employer Roles and Permissions

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.

