



UHCeServices Reference Guide & Video For Brokers



About this Document

This guide is designed for Brokers with access to UHCeServices.

It explains how to navigate the site and complete key tasks, including:

- Quoting and renewing small groups, and accessing renewal packages
- Enrolling, updating, or terminating members; requesting ID cards
- Managing billing and payments
- Viewing member lists, handbooks, and SBCs
- Checking commissions and plan benefits
- Finding helpful resources

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

Using this Document

Click any topic in the Table of Contents to jump to that topic.

Click the Table of Contents link in the top right corner of each page to return to the Table of Contents.

Watch the UHCeServices Video (19 min)

This video for brokers demonstrates how to access business quoting and enrollment tools, view commissions, run reports and manage eligibility, ID cards, billing and more.



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Register via Email Invitation

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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 to access capabilities currently on United eServices® and myallsavers.com. The UHCeServices 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. Internal users must gain access through Secure.

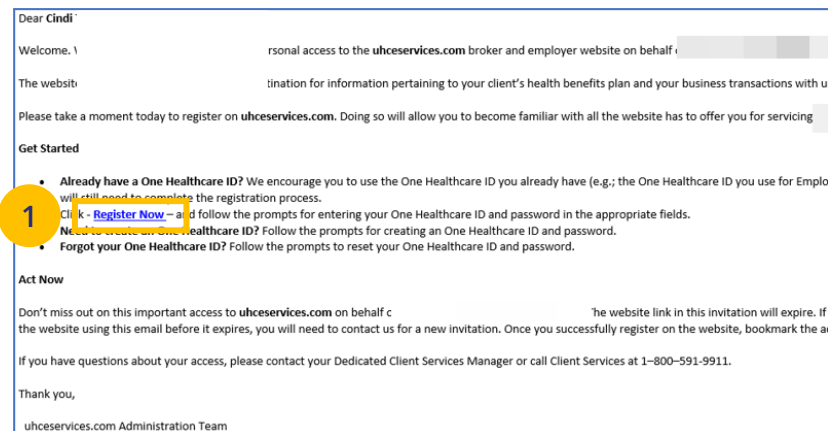
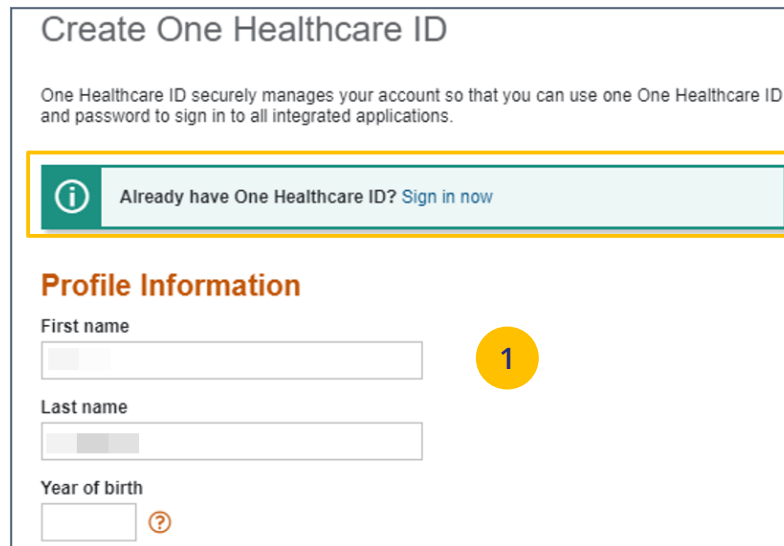
Employers are invited to UHCeServices via email. Brokers can be invited in two ways:

- Email invitation
- Login re-direct from United eServices

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

1. Click the **Register Now** link within the email. The **Create One Healthcare ID** screen displays.
2. Complete the **Profile Information** including **First** and **Last Name** and **Year of birth**.

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.

Register via Email Invitation (continued)

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3. Enter information in the Sign In Information section.
Including:
 - Your email address
 - Create One Healthcare ID
 - Create password
 - Type password again (confirm password)
4. Enter your **Security Questions and Answers**.
These will be used to verify your identity when you sign in to UHCeServices. Answers need to be a minimum of three characters in length.
5. Click **I Agree** to agree to the **Terms of Use** and the **Website Privacy Policy**.

You have completed the process to create your One Healthcare ID.

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

Security Questions and Answers

Security question 1

--Select--

Security answer 1

Security question 2

--Select--

Security answer 2

Security question 3

--Select--

Security answer 3

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

I Agree

Register via Email Invitation (continued)

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

Next Step: Verify Your Email Address

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

10-digit activation code

1571003356

Next Cancel **6**

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

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

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

Confirm your One Healthcare ID email address

 One Healthcare ID - No Reply <noreply@onehealthcareid.com>

To:  Expires: 6/23/2021 Thu 3/25/20

Retention Policy: [See details](#)

One Healthcare ID

Your One Healthcare ID

Activate my One Healthcare ID **6**

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

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

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

Email Address Verified

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

Continue **7**

Share My One Healthcare ID

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

- One Healthcare ID
- Name
- Email address

By clicking I Agree,

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

I Agree Decline **8**

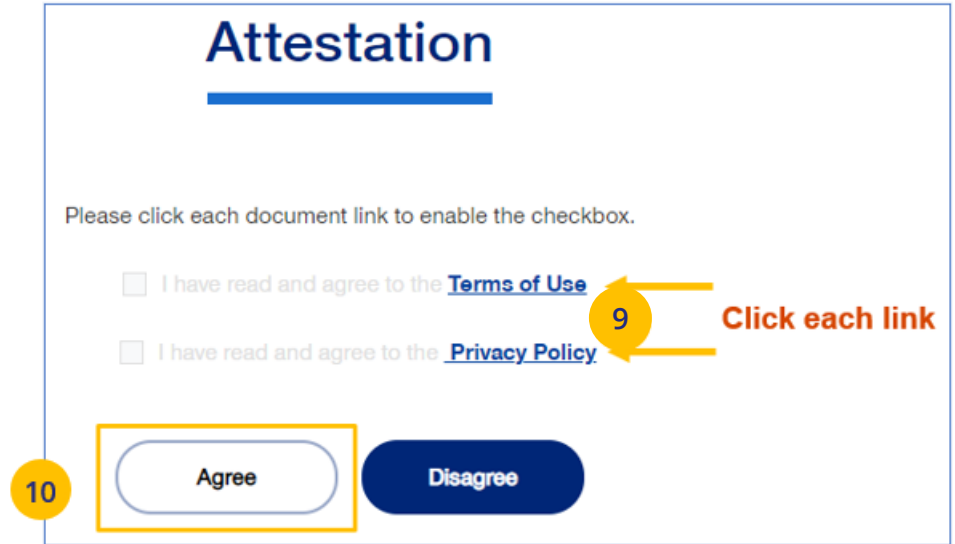
Register via Email Invitation (continued)

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9. You'll be asked to attest to the Terms of Use and Privacy Policy. Select each document to open it for review, then check the corresponding boxes. Once all are flagged, the Agree button will be enabled.

10. Click **Agree**.

You are now ready to use UHCeServices.



The screenshot shows the 'Attestation' screen. At the top, the title 'Attestation' is underlined. Below it, a message says 'Please click each document link to enable the checkbox.' There are two lines of text, each with a checkbox and a link: 'I have read and agree to the [Terms of Use](#)' and 'I have read and agree to the [Privacy Policy](#)'. A yellow circle with the number '9' and an arrow points to the 'Terms of Use' link, with the text 'Click each link' next to it. At the bottom, there are two buttons: 'Agree' (outlined in yellow) and 'Disagree' (solid blue). A yellow circle with the number '10' points to the 'Agree' button.

Login Re-Direct from United eServices (UeS)

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What is happening?

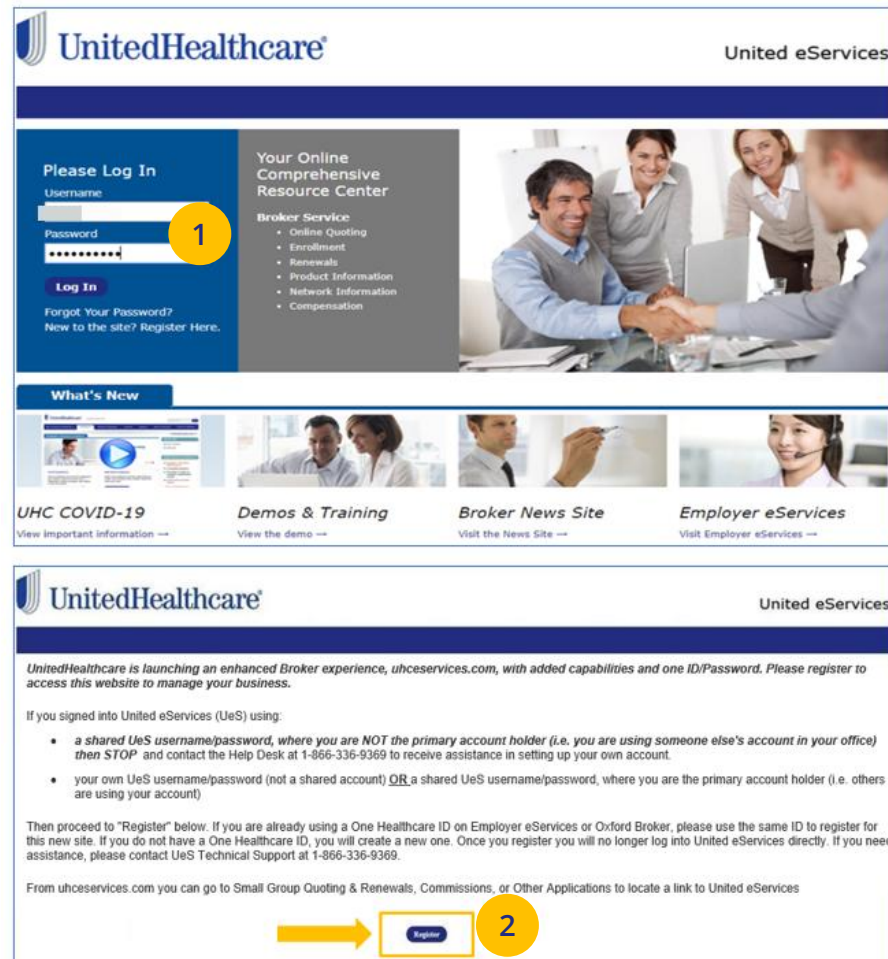
- Brokers will be transitioned from United eServices (UeS) to UHCeServices by market in a phased approach. You will receive a message upon logging into United eServices, directing you to register for UHCeServices.
- After registering, you will then use UHCeServices as your Broker site and access UeS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

Follow the steps below to register for UHCeServices from UeS.

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

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

2. Click **Register**.



UnitedHealthcare® United eServices

Please Log In

Username

Password

Log In

Forgot Your Password?

New to the site? Register Here.

Your Online Comprehensive Resource Center

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

What's New

UHC COVID-19 View Important Information →

Demos & Training View the demo →

Broker News Site Visit the News Site →

Employer eServices Visit Employer eServices →

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

If you signed into United eServices (UeS) using:

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

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

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

Register

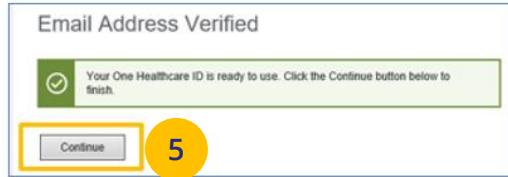
Login Re-Direct from United eServices (UeS) (continued)

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

5. Click **Continue**.

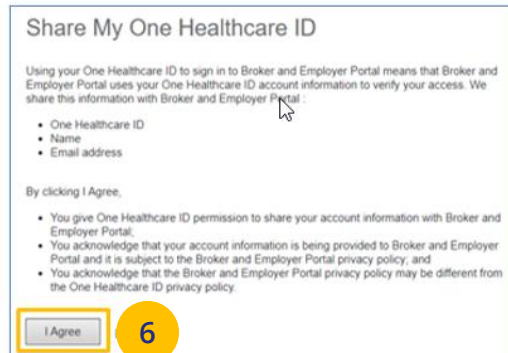
6. Click **I Agree**.



Email Address Verified

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

Continue 5



Share My One Healthcare ID

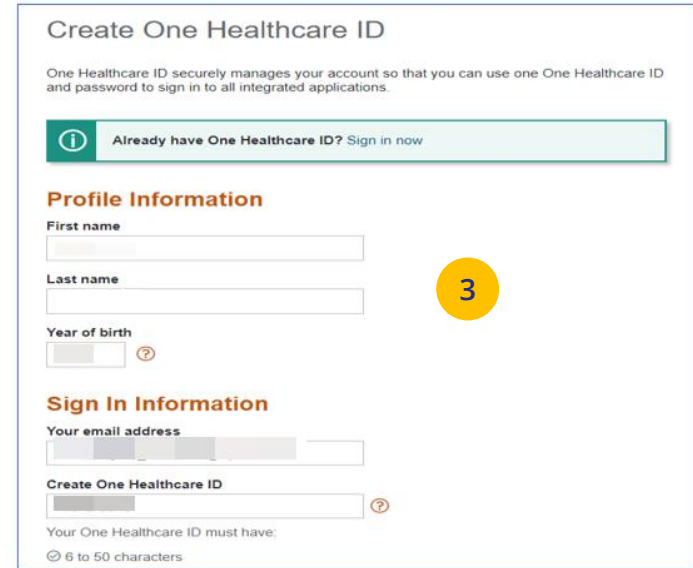
Using your One Healthcare ID to sign in to Broker and Employer Portal means that Broker and Employer Portal uses your One Healthcare ID account information to verify your access. We share this information with Broker and Employer Portal.

- One Healthcare ID
- Name
- Email address

By clicking I Agree,

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

I Agree 6



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 3

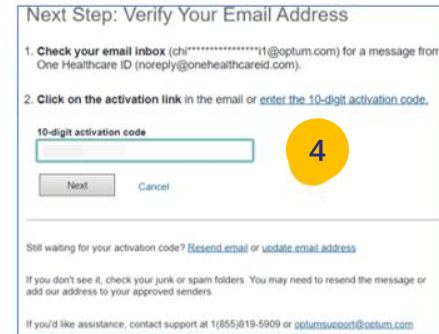
Year of birth ?

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 (ch*****t1@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

Next **Cancel**

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

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

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



Confirm your One Healthcare ID email address

 One Healthcare ID

Your One Healthcare ID 4

Activate my One Healthcare ID

If you prefer, copy this 10-digit code 1571033006 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 support@onehealthcareid.com or optumsupport@optum.com

Login Re-Direct from United eServices (UeS) (continued)

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7. Follow the Attestation process by clicking each link (Terms of Use and Privacy Policy). Click **Agree**. The **Pending Associations** screen displays.
 - **Pending Associations** - Each user, whether you are a broker or a delegate, is associated to one or more agencies or producers. This allows you to easily work on their behalf: quoting new business, managing renewals, etc. You must be associated with all the commission codes used so you can see all your groups.
8. Accept or Decline each listed Broker association as needed.
9. Click **Save**. The UHCeServices Home Page displays.

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

Attestation

Please click each document link to enable the checkbox.

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

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

Click each link

7

Agree **Disagree**

Pending Associations

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

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

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

8

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

9

Cancel **Save**

If you are missing an association that is not currently on your uhceservices.com "My Settings" or isn't listed above, please contact your Broker Lead or Help Desk at 1 866-908-5940

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

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

Login with One Healthcare ID

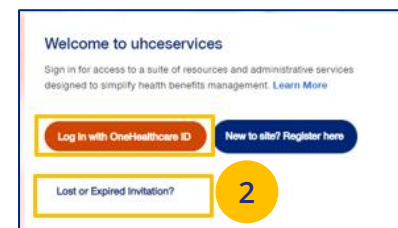
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You cannot access the site directly until you receive an “invite” link from uhceserv_invite@uhc.com and go through the steps to receive access. Once you receive access through the “invite,” you can log in using the steps below.

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](#). The Log In page displays.
2. Click the **Log In With One Healthcare ID** button.
3. Enter your One Healthcare ID in the **One Healthcare ID or email address** field.
4. Enter your Password in the **Password** field.
5. Click **Sign In**. The **Home** page displays.

NOTE: If you do not access the website for 13 months your access will be deactivated.



Sign In With Your One Healthcare ID

One Healthcare ID or email address
3

Password
4

Sign In
5

Forgot One Healthcare ID | Forgot Password

Welcome to One Healthcare ID (formerly known as Optum ID). Please use your existing Optum ID credentials to log in.

Additional options:

[Manage your One Healthcare ID](#)
[What is One Healthcare ID?](#)

Access: New to Site

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If you are new to UHCeServices and do not have a OneHealthcare ID, follow the steps below:

1. Go to [UHCeServices](#). The Log In page displays.
2. Click the **New to site? Register here** button. The **Search for United eServices Account** screen displays.
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.
6. 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.

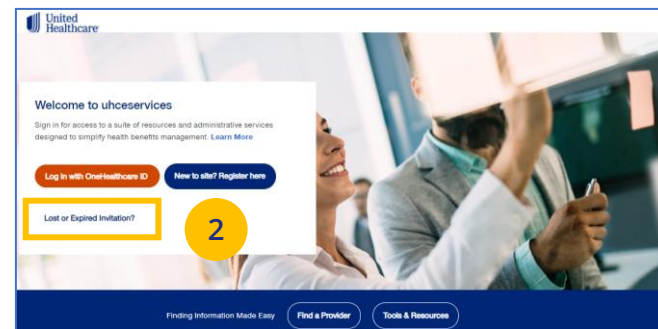
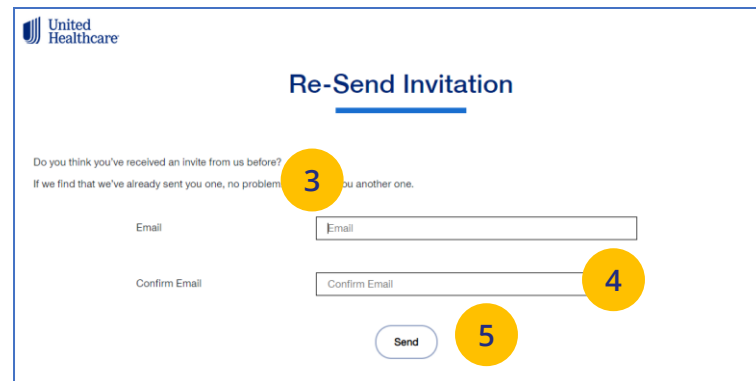
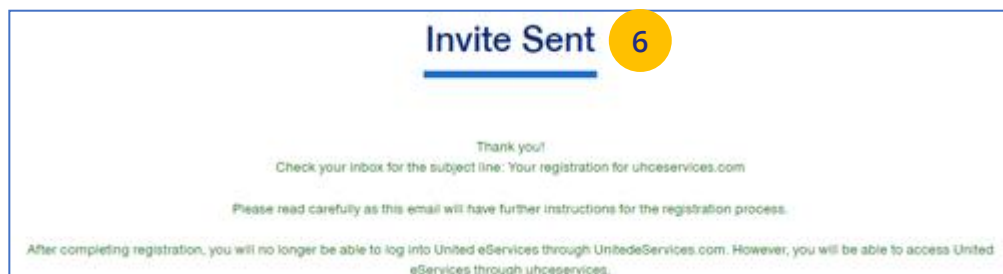
Access: Lost or Expired Invitation

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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](#). 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**.
6. 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.

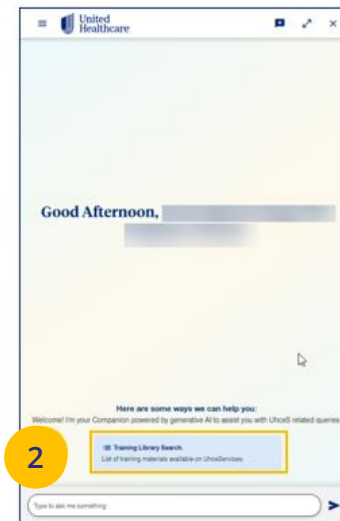
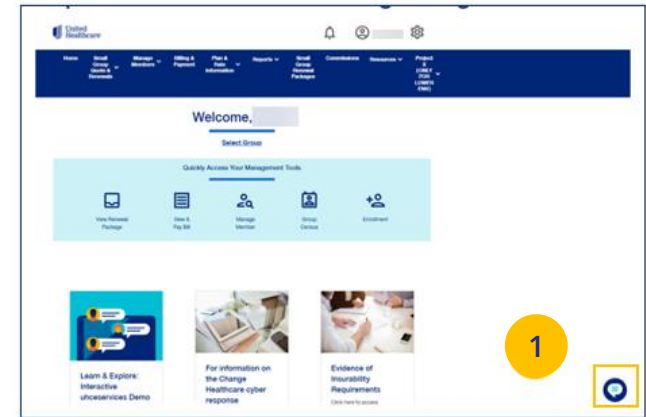




Training Materials

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Use the AI assistant to search and retrieve training documents.

1. Click the speech bubble in the bottom right.
2. Click **Training Library Search**.
3. Select the type of documentation needed. Availability varies based on the user type (Broker, employer, Internal). You can also tell the AI assistant what you are looking for in the conversation box.



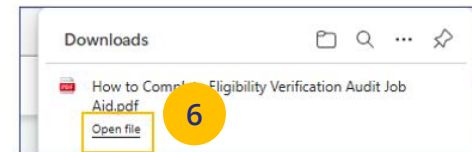
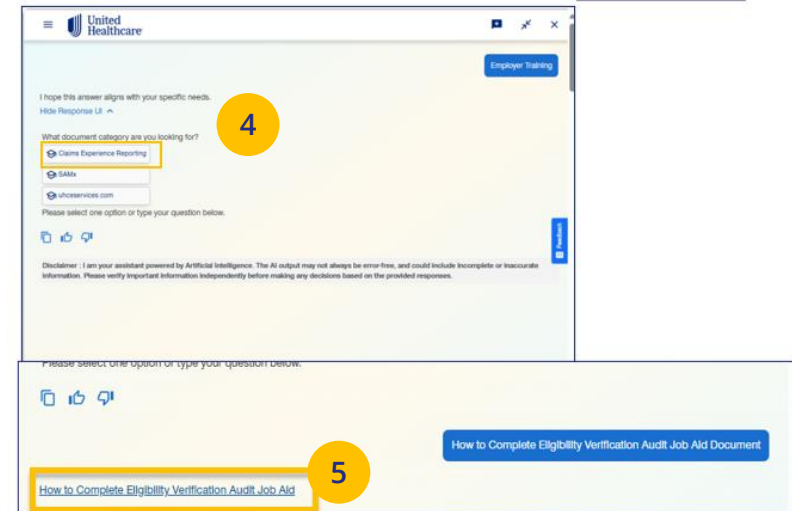
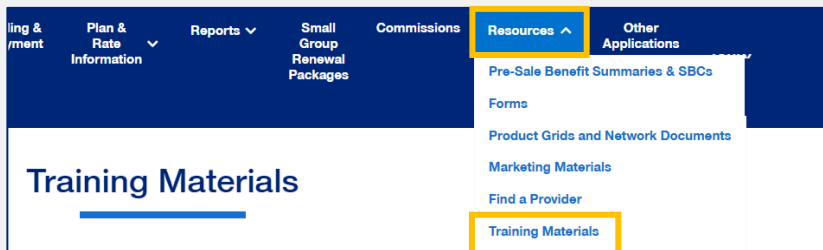
Training Materials (continued)

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4. Select the category for more specific documents.
5. Select the document or video to download or view.
6. Click the **Open file link** in the Downloads window.

NOTE:

You can also access training materials from the **Resources** menu and selecting **Training Materials**.



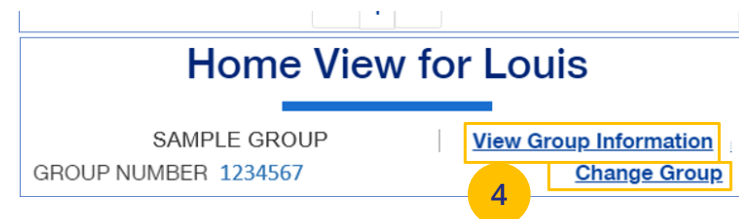
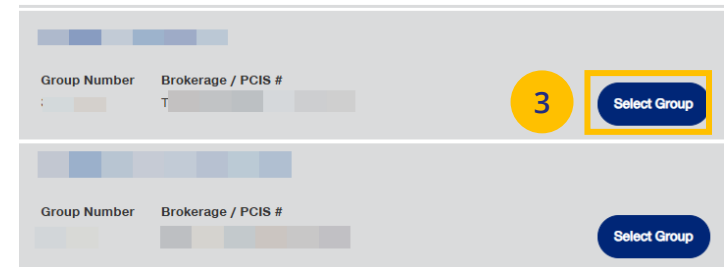
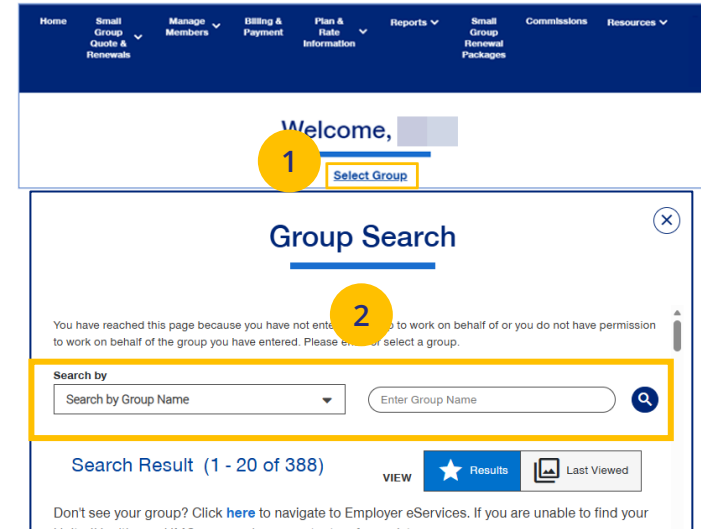
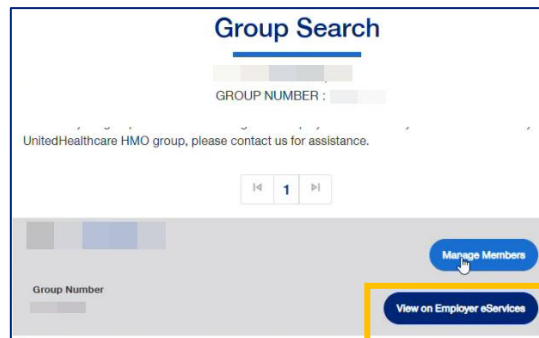
Search and Select Employer Group – Home Page

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Follow these steps to search for and select an employer group from the **Home** page.

1. Click the **Select Group** link. The **Group Search** screen displays.
2. You can search by **Group ID** or **Group Name**. Enter the search criteria and click the search icon. The **Search Results** display.
 - The **Last Viewed** button shows the last five groups searched during your current session. The current group you searched for will be at the top.
3. Click **Select Group**. The group will show as your default group on the Home page. Click the **View Group Information** link to view information on the group.
4. Once a group number is selected, it remains on the **Home** page until you change it. To change to a different group, click the **Change Group** link. Repeat steps 2 and 3 to select your new group.

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

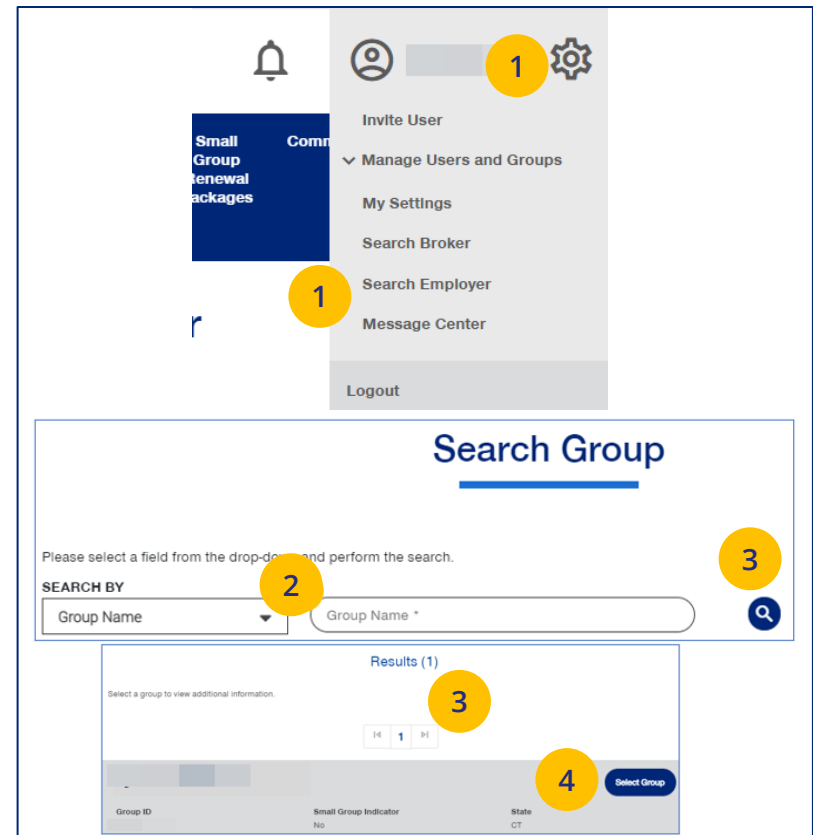


Search for Employer – Gear icon

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You can also search for an employer group by using the **Gear** icon in the upper right-hand corner of the screen. You do not need to be on the Home page.

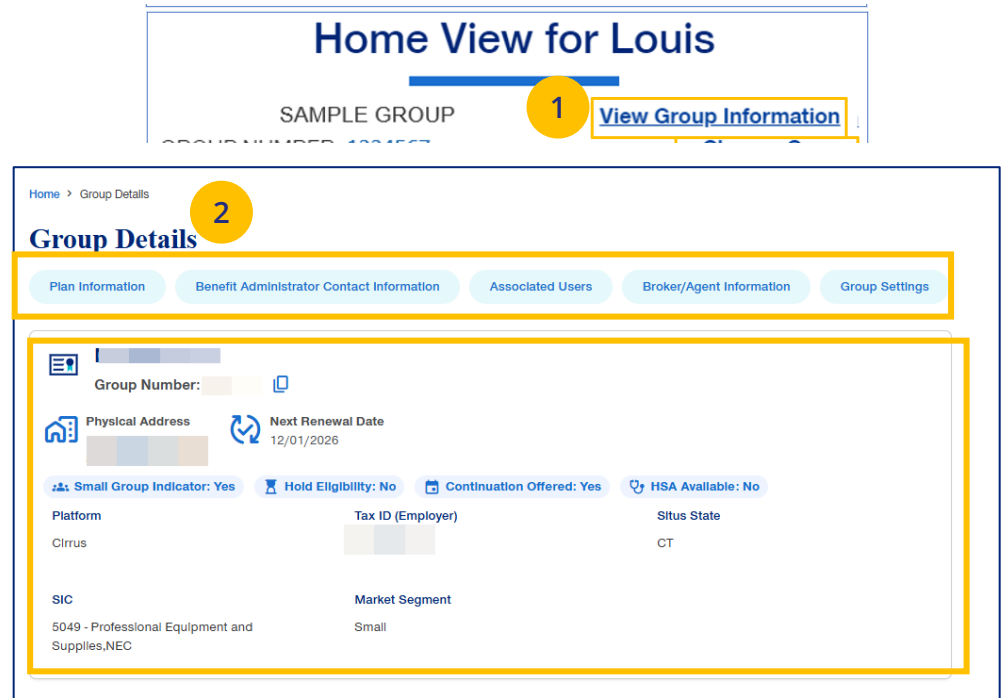
1. Click the **Gear icon** and select **Search Employer**.
2. Enter the search criteria, either Group Name or Group ID.
3. Click the **Search** icon. The search results will be shown.
4. Click **Select Group** for the group you want to view. The **Group** Details page displays.



Group Details

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1. Once a group has been selected, click the **View Group Information** link.
2. The **Group Details** page shows general group information such as address, tax ID and renewal date. Click the buttons to view:
 - Plan Information
 - Benefit Administrator Contact Information
 - Associated Users
 - Broker/Agent Information
 - Group Settings



Home View for Louis

SAMPLE GROUP

[View Group Information](#)

Home > Group Details

Group Details

Plan Information | Benefit Administrator Contact Information | Associated Users | Broker/Agent Information | Group Settings

Group Number: [REDACTED]

Physical Address [REDACTED] Next Renewal Date 12/01/2026

Small Group Indicator: Yes | Hold Eligibility: No | Continuation Offered: Yes | HSA Available: No

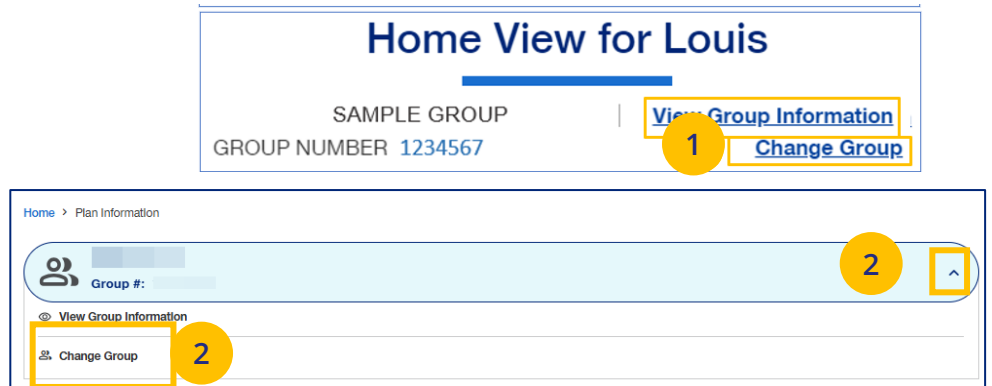
Platform	Tax ID (Employer)	Situs State
Cirrus	[REDACTED]	CT

SIC	Market Segment
5049 - Professional Equipment and Supplies, NEC	Small

Change Groups

There are two ways to change groups.

1. Return to the Home page and click the **Change Group** link.
2. Some pages have a drop down at the top that allows you to select **Change Group**.



Home View for Louis

SAMPLE GROUP

GROUP NUMBER 1234567

[View Group Information](#)

[Change Group](#)

Home > Plan Information

Group #: [REDACTED]

[View Group Information](#)

[Change Group](#)

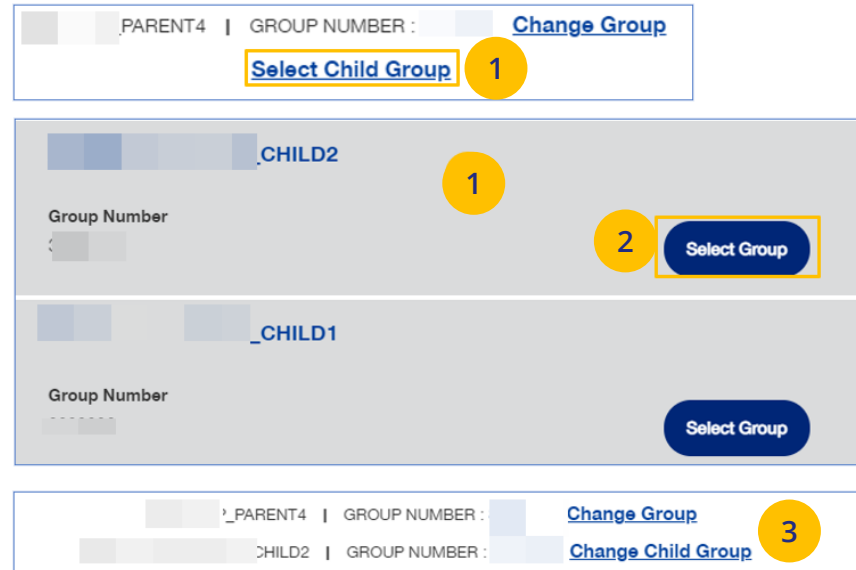
Group Selection: PEO Groups

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For PEO (Professional Employer Organization) groups, you can view the child group information when applicable. Follow the steps below to select the child groups.

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

1. Click **Select Child Group**. The child group name and numbers will be shown.
 - 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.
3. You can click **Change Child Group** and select another child group if more than one is available. To display another parent group, you must click **Change Group** instead of **Change Child Group**.



The screenshot illustrates the group selection process in three numbered steps:

- Step 1:** The top section shows a parent group labeled "PARENT4" with a "GROUP NUMBER" field. A yellow box highlights the "Select Child Group" button, and a yellow circle with the number "1" is next to it.
- Step 2:** The middle section displays two child groups: "CHILD2" and "CHILD1". For "CHILD2", a yellow box highlights the "Select Group" button, and a yellow circle with the number "2" is next to it. For "CHILD1", a "Select Group" button is visible.
- Step 3:** The bottom section shows the "PARENT4" group again, but now with "CHILD2" listed below it. A yellow circle with the number "3" is next to the "Change Child Group" link.

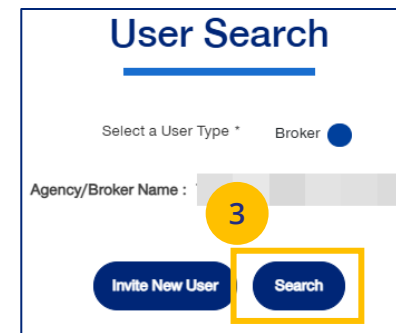
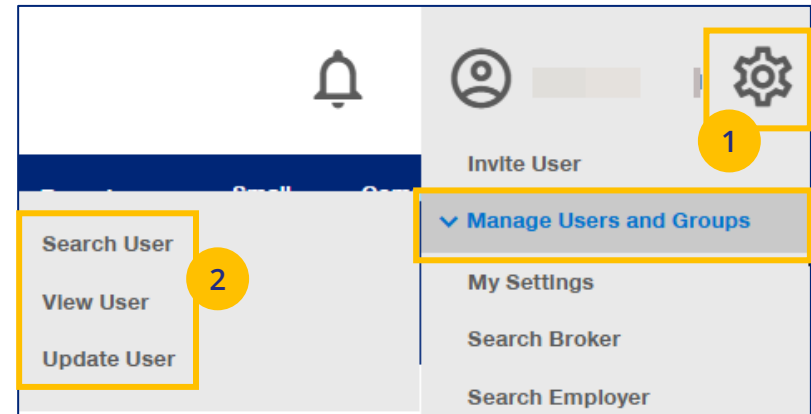
Search Users

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To search for a specific user or to view or update user information:

1. Click the **Gear icon** and select **Manage Users and Groups**. You have several options:
2. Select either **Search User**, **View User** or **Update User**.
3. From the **User Search** screen, click **Search**.
4. The search results display with the list of users. Click **Select User**.

NOTE: Update Parent/Child Groups – Employer Leads can manage Group level settings for sending manual invites and making changes to control who can manage enrollment for those entities with a Parent/Child arrangement such as Professional Employer Organizations (PEOs), Association Health Plans (AHPs), Third Party Administrators (TPAs), etc. Click [here](#) for instructions.



◀ 1 2 3 4 5 ... ▶					4 Select User	
One Healthcare ID	User Email	Role	Last Login	Deactivation		
		Broker View Only	04/15/2025	05/15/2026		

Invite User

[TABLE OF CONTENTS](#)

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 someone to use UHCeServices:

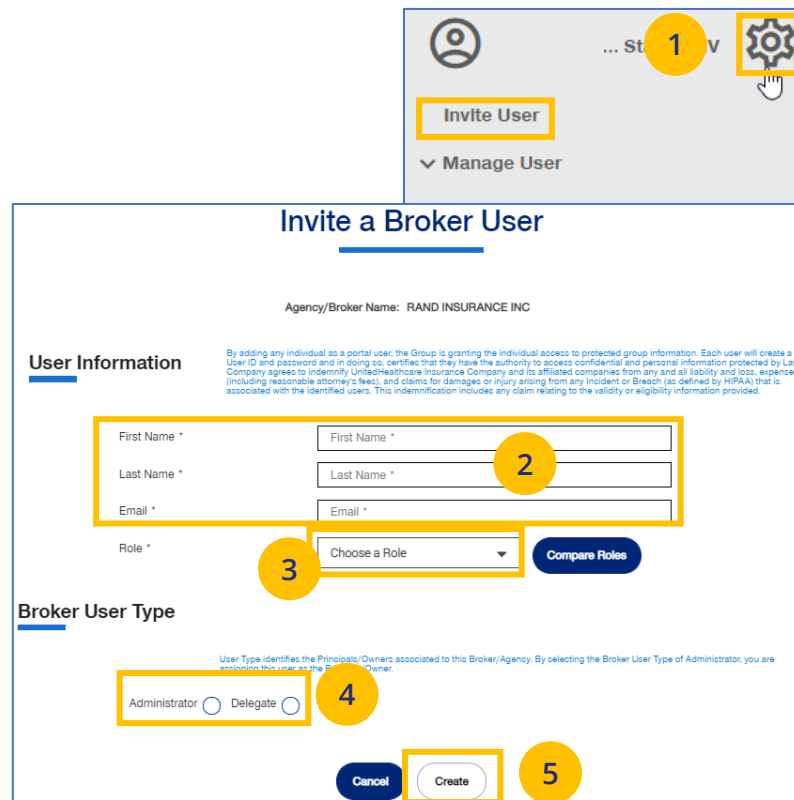
1. Click the **Gear icon** and select **Invite User**. The **Invite User** screen displays.
2. Enter **First Name**, **Last Name**, **Email** address.
3. Select the **Role** from the **Choose a Role** dropdown.

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

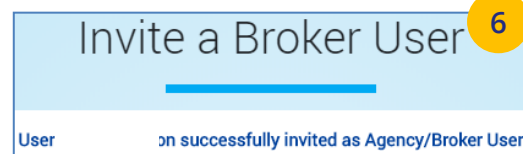
Broker and Employer Roles

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

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



The screenshot shows the 'Invite a Broker User' interface. At the top right, a gear icon (1) is highlighted, with a dropdown menu showing 'Invite User' (2) and 'Manage User'. Below this, the form title 'Invite a Broker User' is displayed, followed by 'Agency/Broker Name: RAND INSURANCE INC'. The 'User Information' section includes fields for 'First Name *' (3), 'Last Name *' (4), and 'Email *'. A 'Role *' dropdown menu (5) is set to 'Choose a Role', with a 'Compare Roles' button next to it. The 'Broker User Type' section has two radio buttons: 'Administrator' (selected) and 'Delegate'. At the bottom, there are 'Cancel' and 'Create' buttons.



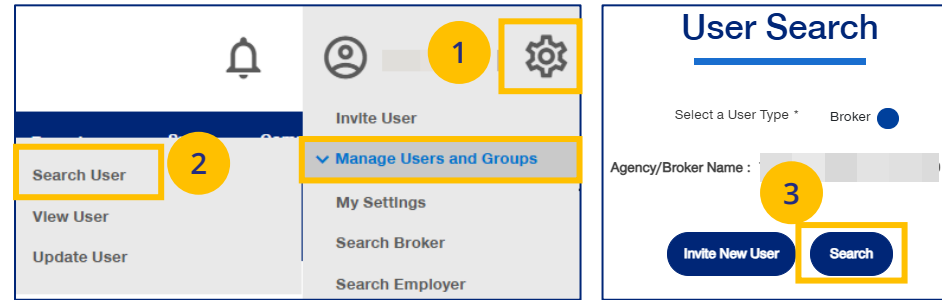
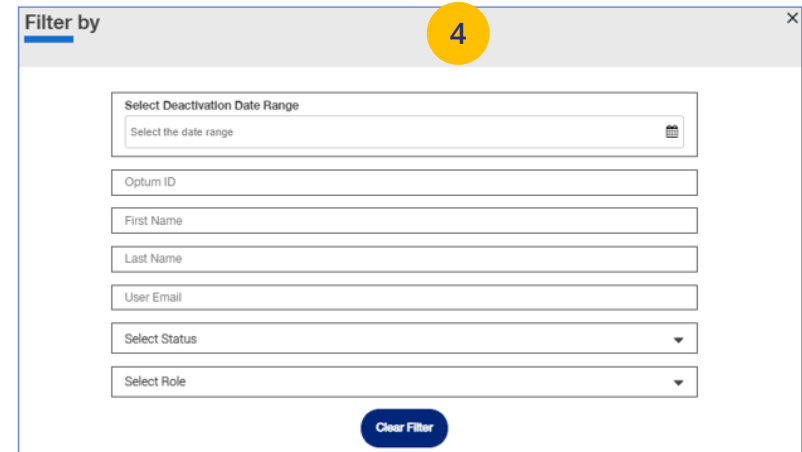
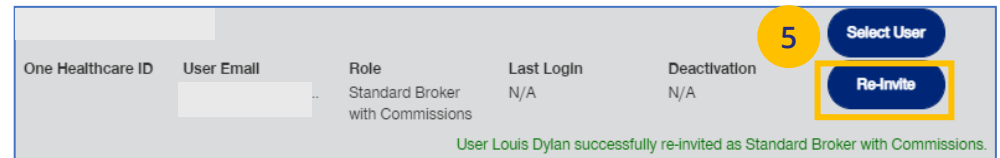
The screenshot shows a confirmation message box titled 'Invite a Broker User'. It contains the text: 'User [blank] on successfully invited as Agency/Broker User'. A yellow circle with the number 6 is placed over the top right corner of the message box.

Re-Invite a User

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To re-invite a specific user to view or update user information:

1. Click the **Gear icon** and select **Manage Users and Groups**.
2. Select **Search User**.
3. Click the **Search** button.
4. In the **Filter by** area, click the plus sign to expand the filter fields. Search for the user you need using the filter fields.
5. Click on **Re-Invite**. A message displays indicating the “re-invite” was successful. The user will receive a new invitation email.

Small Group Quote & Renewals Tab

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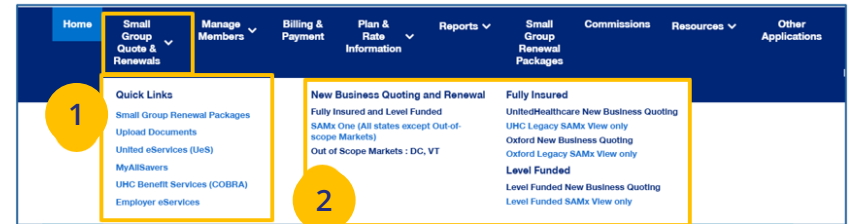
The **Small Group Quoting & Renewals** menu will direct you to the correct quoting/enrolling and renewal tool, depending on funding, market, etc. Other common tools are provided under Quick Links.

1. **Quick Links** provides access to the following:

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

2. **Small Group Quoting and Renewal** provides links to quoting, enrolling, and renewals (for Fully Insured and Level Funded) in the following applications:

- SAMx One
- SAMx Legacy



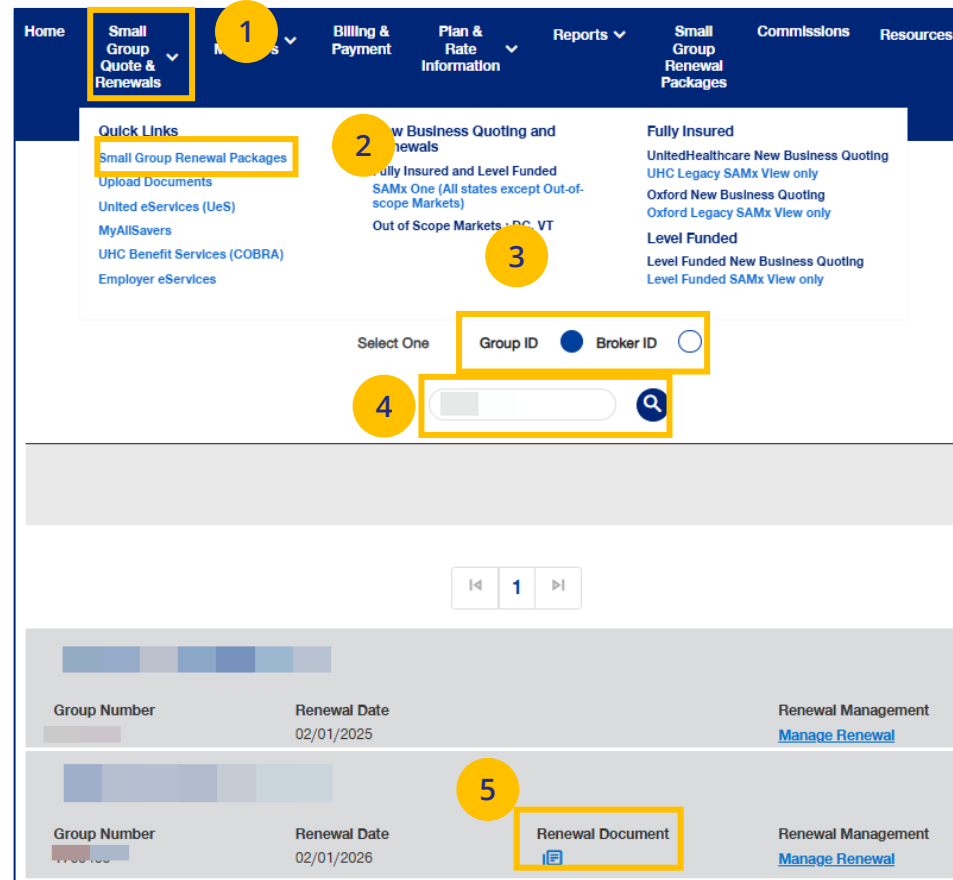
Small Group Renewals Packages

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Use this link to view the renewal documents for groups.

To search by Group ID:

1. Click **Small Group Quote & Renewals**.
2. Click **Small Group Renewal Packages**.
3. Select the **Group ID** button.
4. Enter the Group ID in the search box and click the **Search** icon.
5. Click the **Renewal Document** link to view the document.



The screenshot shows the UnitedHealthcare Small Group Renewal Packages interface. The navigation bar at the top includes links for Home, Small Group Quote & Renewals (1), Billing & Payment, Plan & Rate Information, Reports, Small Group Renewal Packages, Commissions, and Resources. The main content area features a Quick Links section with a link to Small Group Renewal Packages (2). Below this, there are sections for Fully Insured and Level Funded plans. A search section (3) allows users to select between Group ID and Broker ID. A search box (4) with a magnifying glass icon is provided for entering the Group ID. The results section shows a table with columns for Group Number, Renewal Date, and Renewal Management. The first row shows a renewal date of 02/01/2025. The second row shows a renewal date of 02/01/2026 and includes a Renewal Document link (5) with a PDF icon.

Small Group Renewals Packages (continued)

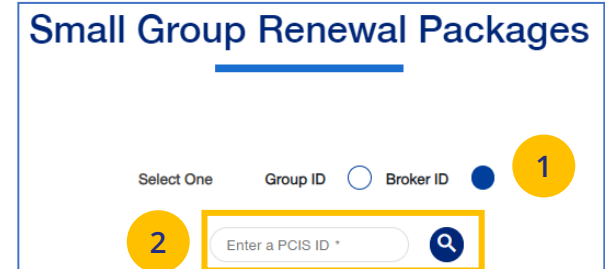
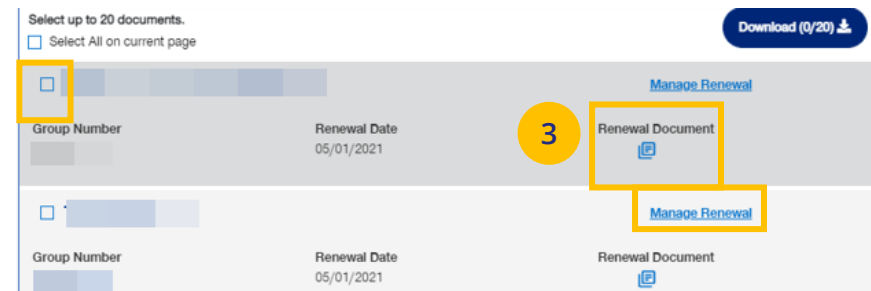
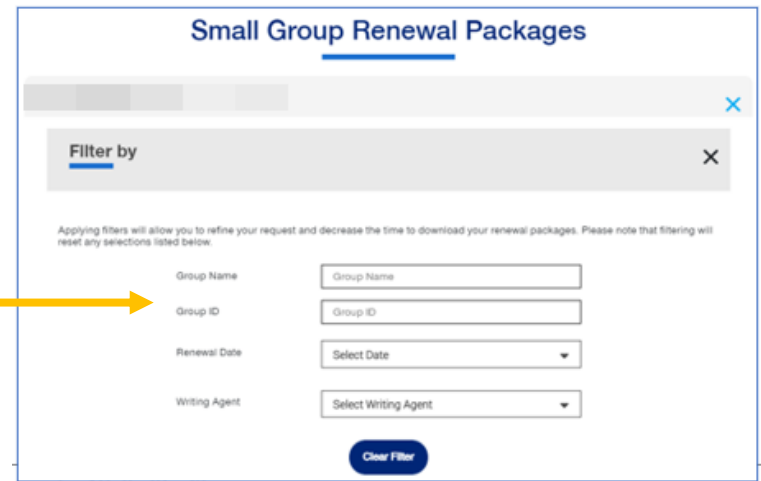
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To search by Broker ID:

1. After selecting **Small Group Renewal Packages** from the **Small Group Quote & Renewals** menu, select the Broker ID button.
2. Enter the broker's PCIS ID and click the **Search** icon to display the associated package(s) for the group(s).
3. Click 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 One.
- **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 group listed on one page at a time.
- **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.

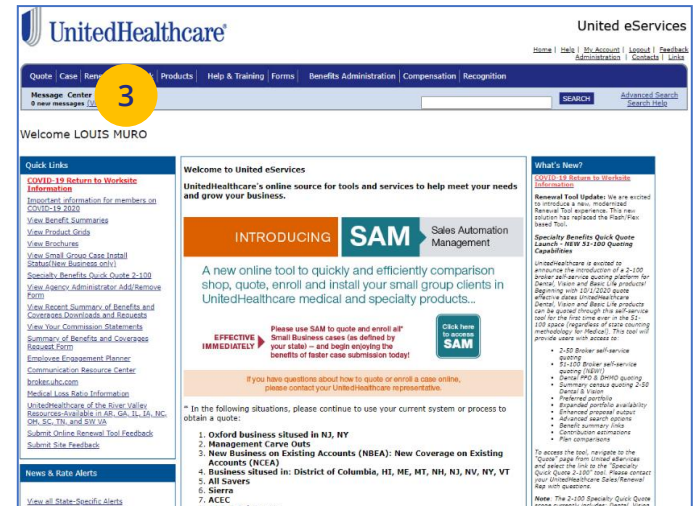
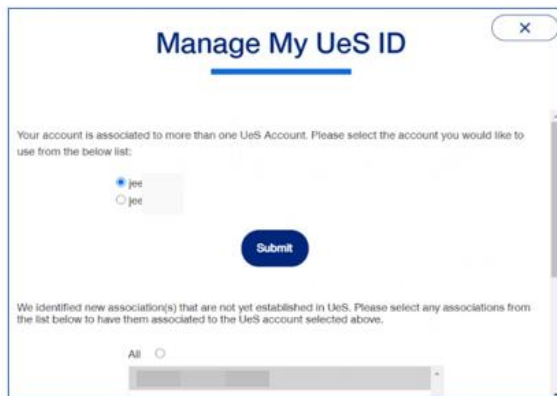




United eServices (UeS)

Sign on and access United eServices (UeS)

1. Click the **United eServices (UeS)** link from the **Small Group Quote & Renewals** menu. The **United eServices** sign on screen displays.
2. Enter your **UeS Username** and **Password** or click the **Continue** button in the **I Do Not Have a United eServices Account** box, if this is the first time accessing the site. You will then be directed to the home page. After your first access, you will go to UeS automatically.
3. Click **Submit**. The UeS Home Page displays.

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**.

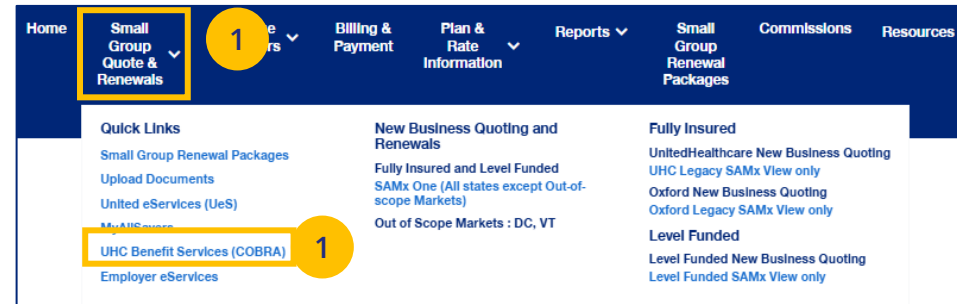
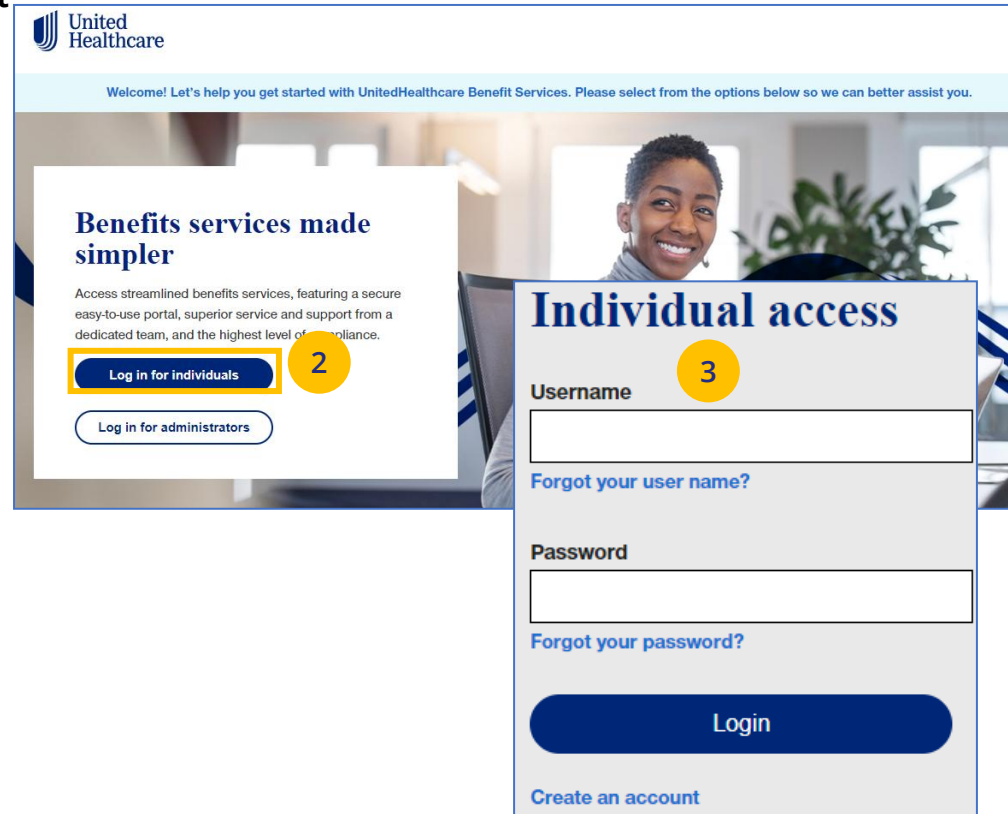


UHC Benefit Services (COBRA)

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

1. Click the **UHC Benefit Services (COBRA)** link.
2. Under **Benefits services made simpler**, click **Log in for individuals**. The **Individual access** Login screen displays.
3. Enter your **Username** and **Password** for **UHC Benefit Services** and click **Login**. The **Billing Services Account Screen** displays.

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

Benefits services made simpler

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

Log in for individuals

Log in for administrators

Individual access

Username

Password

Login

[Forgot your user name?](#)

[Forgot your password?](#)

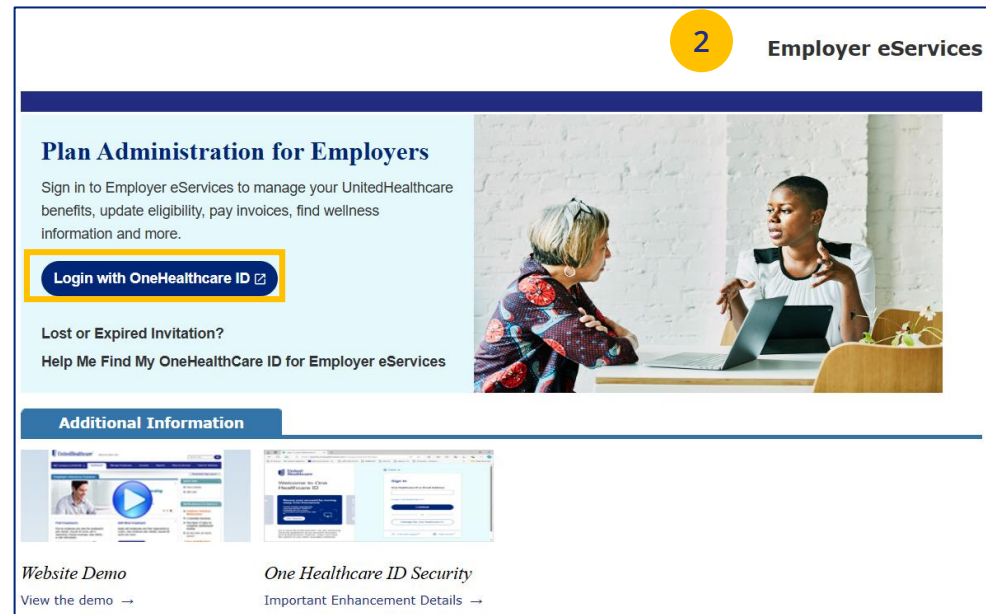
[Create an account](#)

Employer eServices

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

1. Click the **Employer eServices** link from the Small Group Quote & Renewals drop down menu.
2. Click the **Login with OneHealthcare ID** button.



My Settings

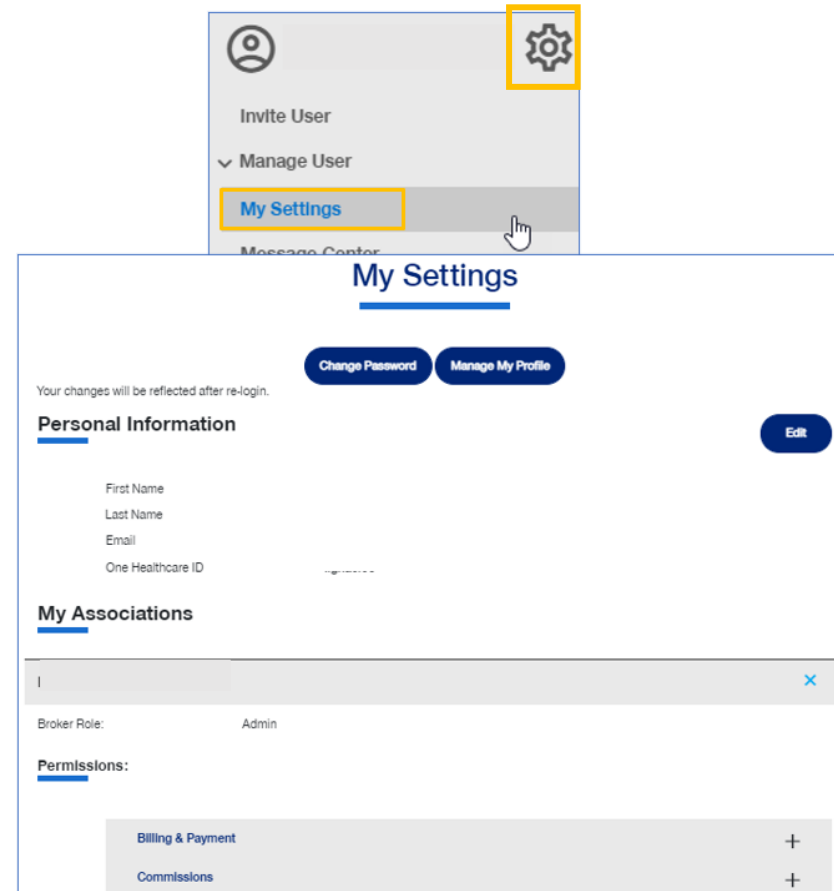
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Manage your profile from the **My Settings** page located from the Gear icon.

Click the **Gear** icon in the upper right corner and select **My Settings**.

From here you can:

- **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.

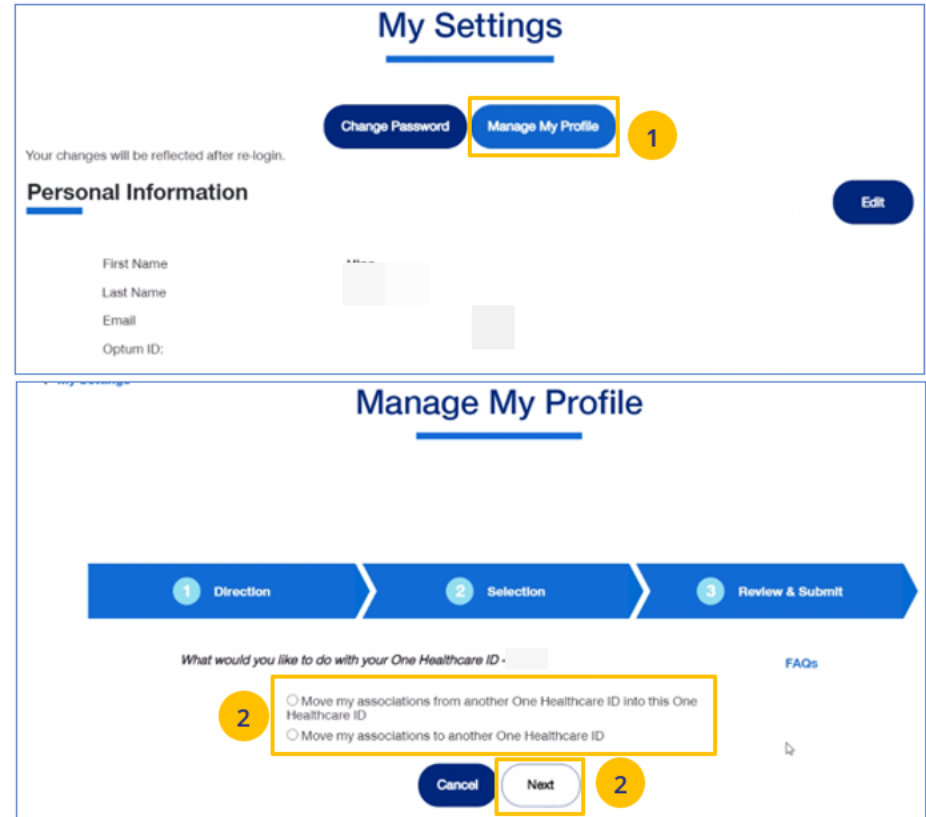


Manage My Profile

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

1. Click the **Manage My Profile** button.
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.
2. Select the button that indicates what you want to do and click **Next**.

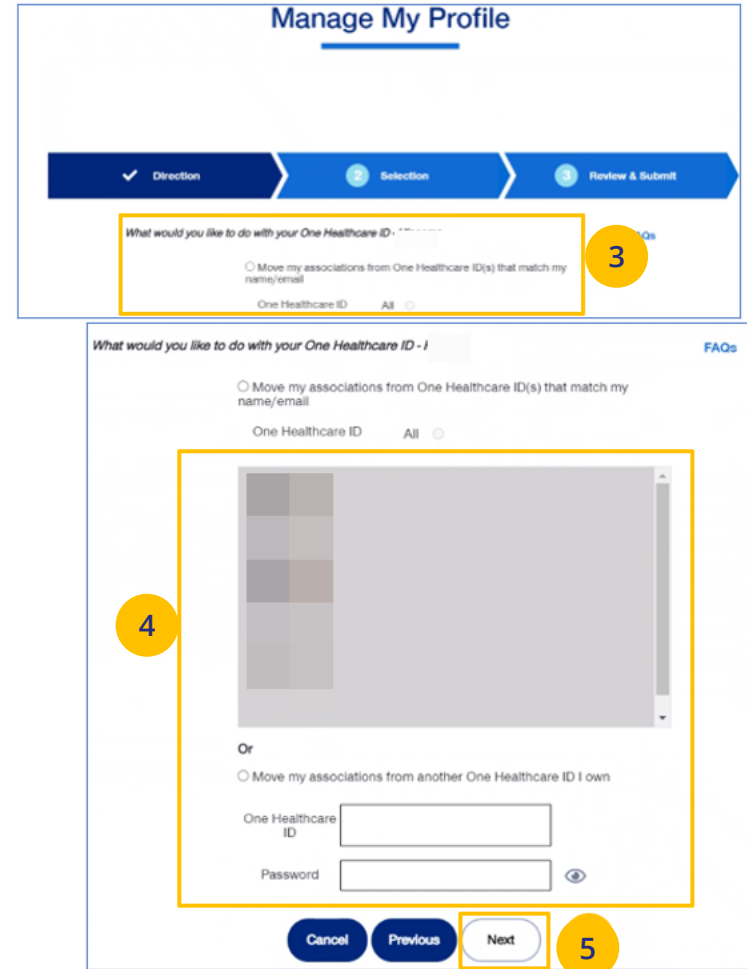


The image displays two screenshots of the UnitedHealthcare web interface. The top screenshot, titled "My Settings", shows a navigation bar with "Change Password" and "Manage My Profile" buttons. The "Manage My Profile" button is highlighted with a yellow box and a yellow circle containing the number 1. Below the navigation bar is a "Personal Information" section with fields for First Name, Last Name, Email, and Optum ID, each with a corresponding input field. An "Edit" button is located to the right of these 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 is a section titled "What would you like to do with your One Healthcare ID?" with two radio button options: "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.

Manage My Profile

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



Manage My Profile

✓ Direction 2 Selection 3 Review & Submit

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

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

One Healthcare ID All

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

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

One Healthcare ID All

Or

☐ Move my associations from another One Healthcare ID I own

One Healthcare ID

Password

Cancel Previous Next

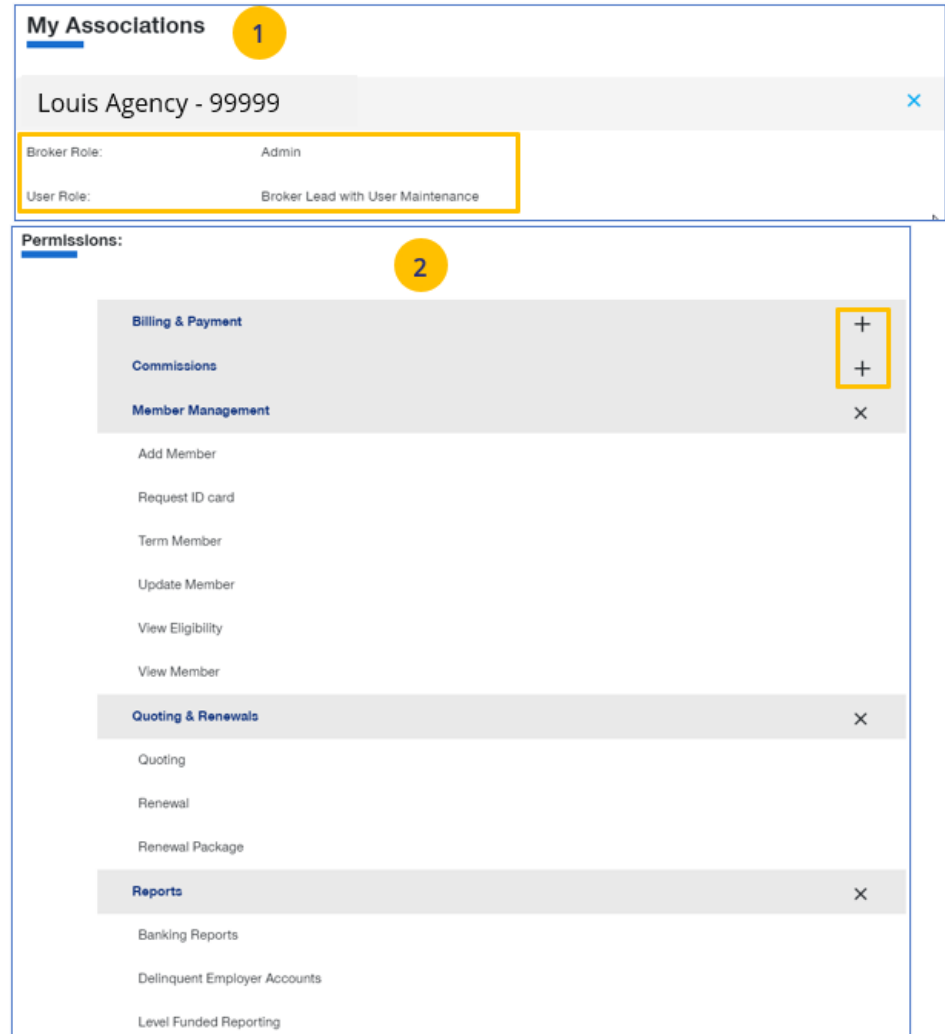
Roles & Permissions (My Associations)

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

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

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



My Associations 1

Louis Agency - 99999

Broker Role: Admin

User Role: Broker Lead with User Maintenance

Permissions: 2

Billing & Payment +

Commissions +

Member Management x

Add Member

Request ID card

Term Member

Update Member

View Eligibility

View Member

Quoting & Renewals x

Quoting

Renewal

Renewal Package

Reports x

Banking Reports

Delinquent Employer Accounts

Level Funded Reporting

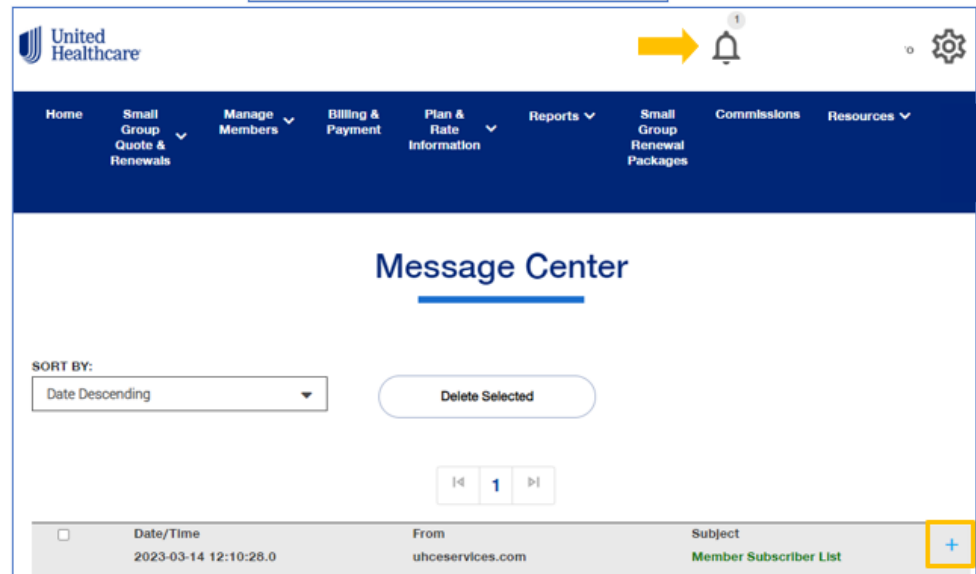
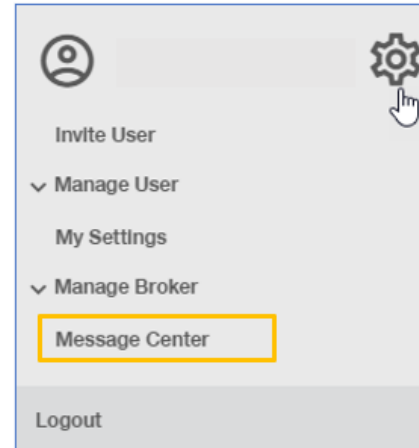
Message Center

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

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

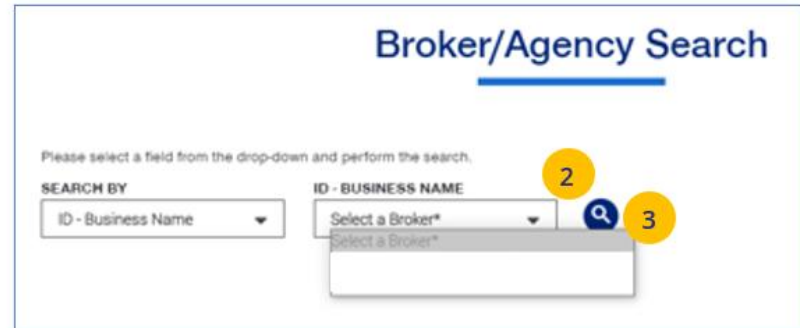
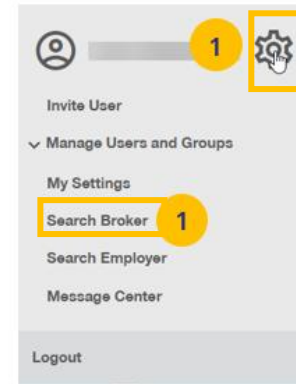
NOTE: to open a message in the Message Center, click the plus sign and click the link to the report or message.



Search Broker

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



This screenshot shows the 'Broker/Agency Search' form. It includes a 'SEARCH BY' dropdown (2) and an 'ID - BUSINESS NAME' dropdown (3) with a search icon (3).



This screenshot shows the search results table. The table has columns for Email, PCIS ID, Pulse ID, Broker Type, and General Agency. A 'Select Broker/Agency' button (4) is highlighted with a yellow box.

Email	PCIS ID	Pulse ID	Broker Type	General Agency
			Individual	Yes

View Broker

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When you view detailed information for a specific Broker, information will be shown in the following sections:

- **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

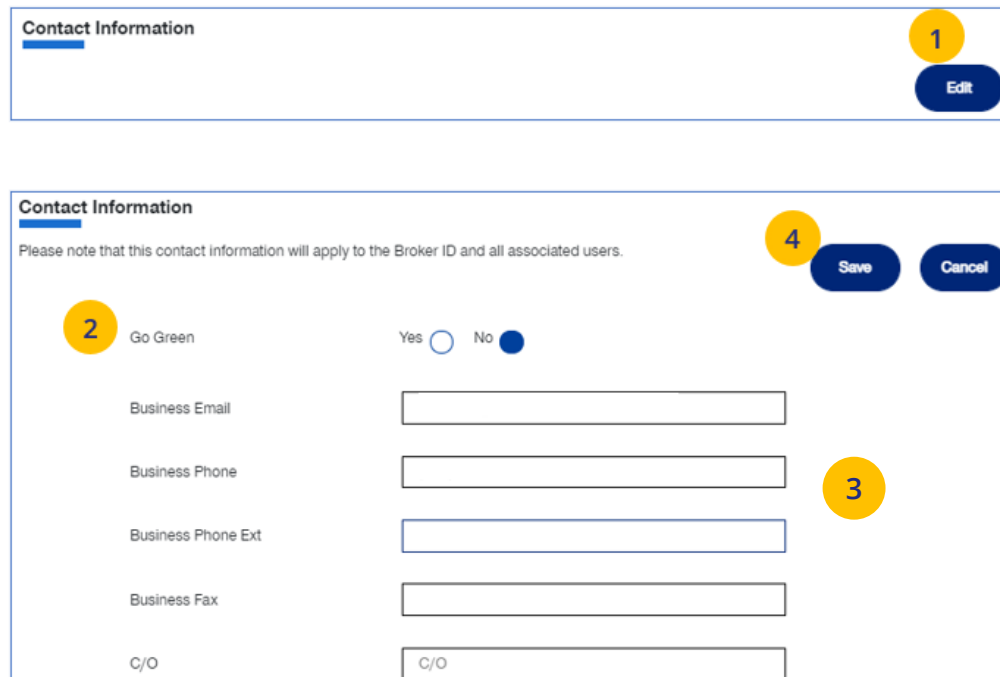
Broker/Agency Information		×
First Name		
Last Name		
Email		
PCIS ID		
Pulse ID		
General Agent Indicator	Yes	
Broker Type	Individual	
Contact Information		+
Appointment Information		+
Associated Groups		+
Associated Users		+

Update Broker Contact Information

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To update broker contact information, follow the steps below:

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



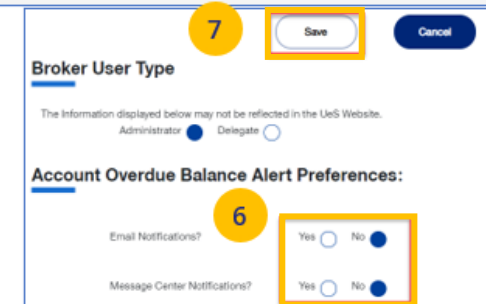
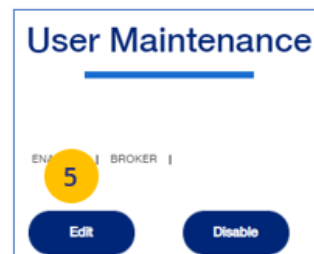
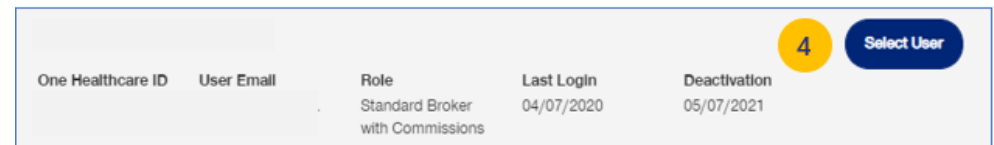
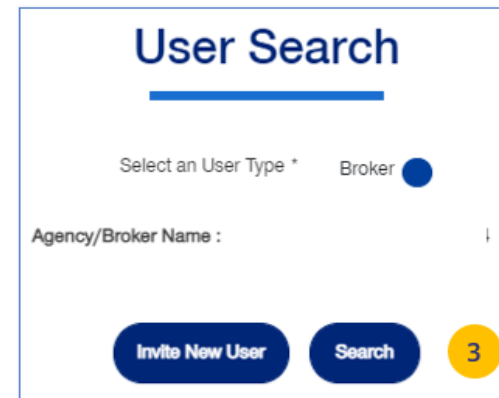
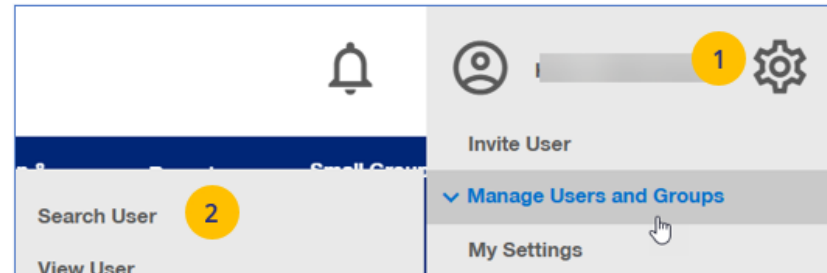
The image shows two screenshots of the 'Contact Information' form. The first screenshot shows the 'Edit' button in the top right corner, labeled with a yellow circle containing the number 1. The second screenshot shows the form with several fields: 'Go Green' with radio buttons for 'Yes' and 'No' (labeled with a yellow circle containing 2), 'Business Email', 'Business Phone', 'Business Phone Ext', 'Business Fax', and 'C/O' (labeled with a yellow circle containing 3). The 'Save' button is in the top right corner, labeled with a yellow circle containing the number 4. A note above the fields states: 'Please note that this contact information will apply to the Broker ID and all associated users.'

Update User's Account Overdue Balance Alert Preferences

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

1. Click the **gear icon** and select **Manage Users and Groups**.
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 receives alerts. Choose **Yes** or **No** for **Email Notifications** and **Yes** or **No** for **Message Center Notifications**.
7. Click **Save**.



Member Search/View Member

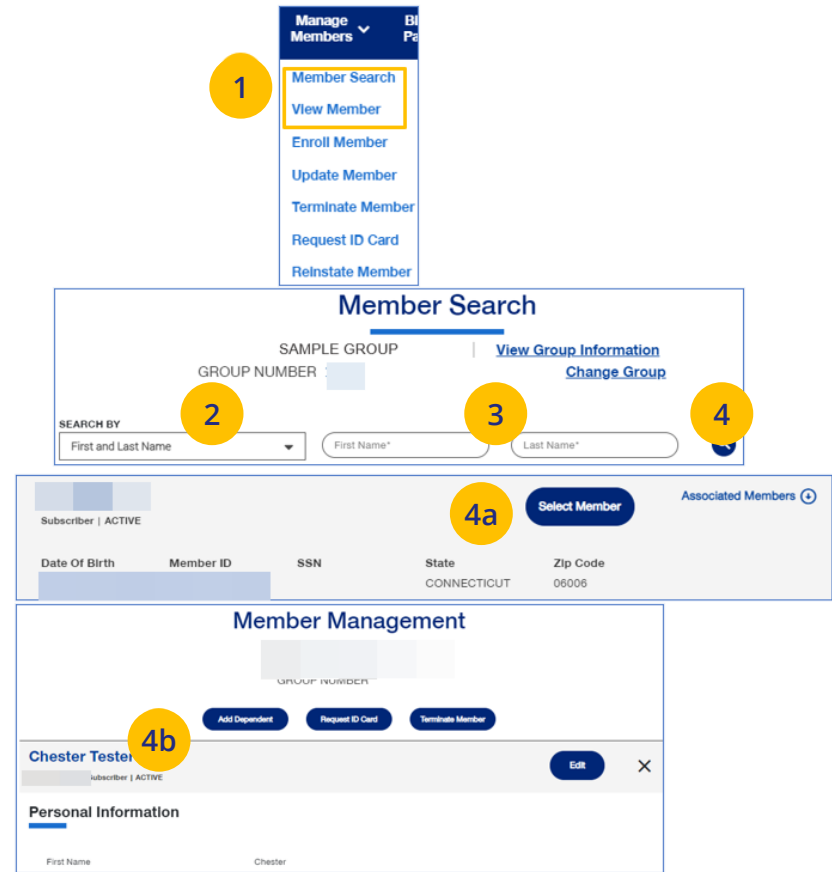
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The **Member Search** and **View Member** tabs are used to search for a specific member record. **They both perform the same function.** You can search for a member using one of the following options:

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

1. Click the **Manage Members** tab and select **Member Search** or **View Member**. **NOTE:** If you have not done so, you will be asked to enter a group number.
2. Select the search criteria from the **Search By** drop-down.
3. Enter the search criteria.
4. Click the Search icon.
 - a) **If you search using any of the Name options**, the search results will be shown. Click **Select Member**. The **Member Management** screen displays.
 - b) **If you search using Member ID**, the **Member Management** screen displays.

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 three main sections:

- Manage Members Menu:** A dropdown menu where 'Member Search' and 'View Member' are highlighted with a yellow box and labeled with a yellow circle '1'.
- Member Search Form:**
 - A yellow circle '2' points to the 'SEARCH BY' dropdown menu, which is currently set to 'First and Last Name'.
 - A yellow circle '3' points to the 'First Name*' input field.
 - A yellow circle '4' points to the 'Last Name*' input field.
 - A yellow circle '4a' points to the 'Select Member' button.
- Member Management Card:**
 - A yellow circle '4b' points to the 'Chester Tester' member card, which shows 'Subscriber | ACTIVE' status and an 'Edit' button.

Additional visible elements include a 'GROUP NUMBER' field, a 'View Group Information' link, a 'Change Group' link, and a table of member details (Date Of Birth, Member ID, SSN, State, Zip Code) for Chester Tester.

Enroll Member: Demographics

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

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

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

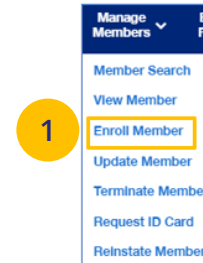
2. Click the **New Member** box.

3. On the **Member Enrollment** screen, 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.



Member Enrollment

ARKEA BIO CORP | [View Group Information](#)
GROUP NUMBER | [Change Group](#)

1 Demographics
2 Coverage
3 Review & Submit

Fields marked with an asterisk * are required.

Product Selection

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

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

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

Health Products : ☒ Medical ☐ Vision ☐ Dental

Reason for Enrollment * Select Reason i

Date of Qualifying Event * MM/DD/YYYY

Requested Effective Date * MM/DD/YYYY

Enroll Member: Demographics

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

***Please note:** Effective **September 1, 2026**, the upload of supporting documentation will be required for Small Business Groups in:

- FL – all Qualifying Event enrollments
- NY – expansion to all Qualifying Event enrollments – only if group has 5 or fewer enrolled subscribers.

The following document requirements remain in effect from **March 1, 2026**:

- NJ, MD, VA, WV – all Qualifying Event enrollments
- NY – only New Hire Qualifying Event enrollments – only if group has 5 or few enrolled subscribers.

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

Product Sele

Any false or fraudulent information, including but not limited to, any provider, agent, broker, or other person files an enrollment containing materially false information, the purpose of misleading the company commits a fraudulent insurance act which is subject to a civil penalty not to exceed \$5000 dollars and the stated value.

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

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

Health Products : ☒ Medical

Reason for Enrollment *

Involuntary Loss of Coverage

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

By adding individual member enrollment, the Group agrees to keep and provide upon request the information listed below.

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

Enroll Member: Demographics

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- 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.

- If you select **New Hire** or **Initial Enrollment** for the **Reason for Enrollment**, the **Requested Effective Date** will populate after you enter the **Date of Qualifying Event**. The **Waiting Period Rules** indicate the specific rules that will apply for effective dates based on the group contract. You can override the **Requested Effective Date** if needed. After enrollment is submitted, the system will display the **Actual Effective Date** you entered.
 - For UnitedHealthcare HMO** – If one of the COBRA options is selected for **Reason for Enrollment**, the **Date of Qualifying Event** can go back up to 36 months.
- If you need to override the date shown, enter the effective date in the **Requested Effective Date** field. Follow your state guidelines applicable to effective dates.

NOTE: If no plans are available for the **Qualifying Event** and **Requested Effective Date**, the message “There are no plans available at this time” displays.

Reason For Enrollment

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.
- Benefit Selection: Selecting benefits during open enrollment 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.
- Initial Enrollment: Adding a new member outside of the 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.
- Loss of Coverage: Adding a new member outside of open enrollment period qualifies for health care coverage.
- Plan Change: Changing benefit plans outside of open enrollment qualifies for health care coverage.
- Re-enrollment: Re-enrolling a member qualifies for health care coverage. For example, members might cancel their coverage and then apply for coverage again.
- Rehire: Leaving the company and being rehired qualifies for health care coverage.
- Special Enrollment - Adoption: Adopting a child qualifies for health care coverage.
- Special Enrollment - Birth: Having a baby qualifies for health care coverage.
- Special Enrollment - Marriage: Adding a spouse or dependents because of marriage qualifies for health care coverage.

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

Reason For Enrollment

Reason for Enrollment * ▼ 1

Date of Qualifying Event * 5 09/30/2022 📅

Requested Effective Date * 12/01/2022 📅

⚠️ Waiting Period Rules

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

Reason For Enrollment

Reason for Enrollment * ▼ 1

Date of Qualifying Event * 6 09/30/2022 📅

Requested Effective Date * 12/01/2022 📅

⚠️ Waiting Period Rules

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

Enroll Member: Demographics

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- 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.

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

- 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 *

Middle Name

Last Name *

Suffix

Select Suffix

Birth Date *

Gender *

Select Gender

Social Security Number *

OR

Date of Hire *

Employment Status

Select Status

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

Contact Information

Home Address Line 1 *

Home Address Line 2

Home Zip Code *

Home City *

Home State *

Select State

Home Phone

Work Phone

Mobile Phone

Preferred Phone

Select Phone

Email Address

Cancel

Add Dependent

Next

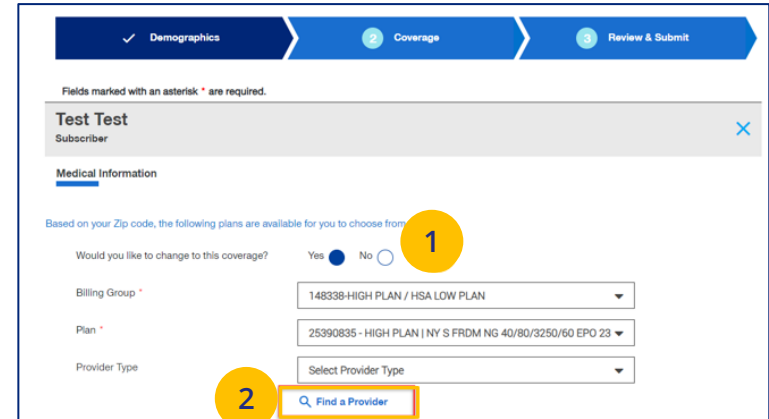
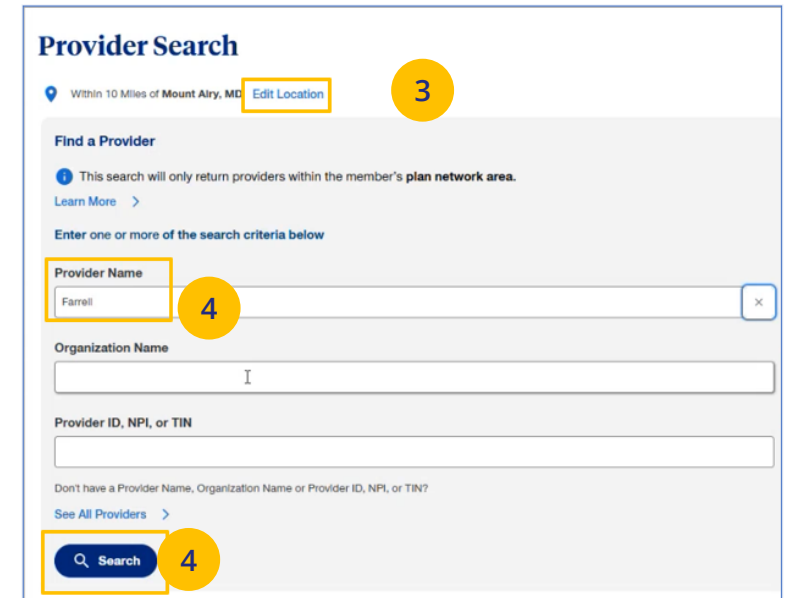
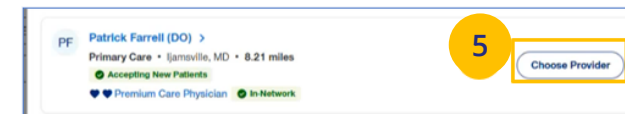
Enroll Member: Coverage - Medical

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

NOTE: Based on the medical plan selected, a Primary Care Provider (PCP) may be required.

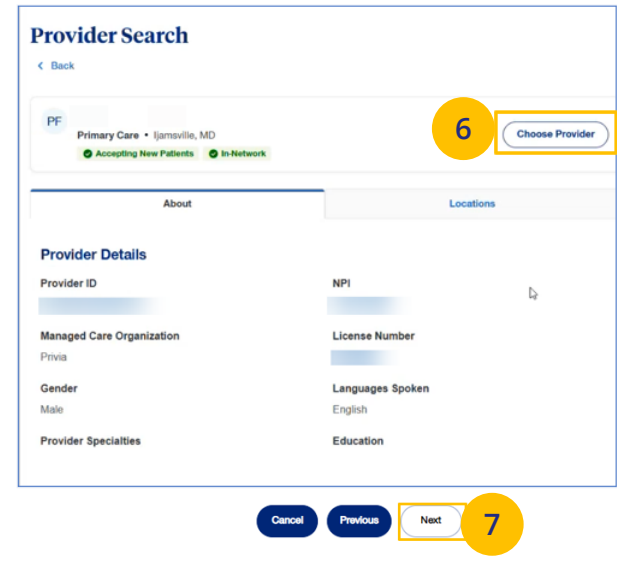
2. Click the **Find a Provider** link.
3. Click **Edit Location**, if needed, to enter search area based on zip code.
4. Enter **Provider Name** (or Organization Name or Provider ID, NPI or TIN) and click **Search**.
5. When providers matching the search appear, click **Choose Provider** review provider details.

Enroll Member: Coverage - Medical

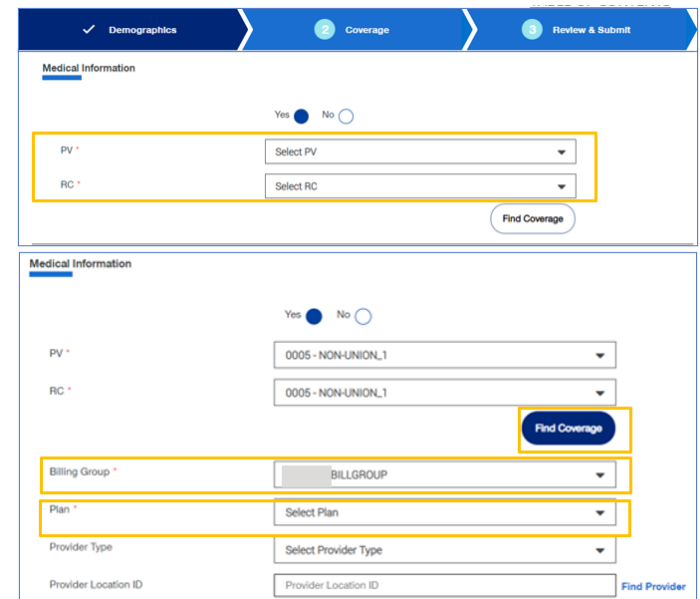
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6. Review provider details and click **Choose Provider**.
7. Click **Next**.



NOTE: Some groups may be set up with custom attributes. Examples could include **PV (Plan Variation)** and **RC (Reporting Code)** structure or Coverage Type and Location structure.

For those groups, they will see those options on the Coverage screen. Use the drop-down boxes to select the appropriate option for that employee. The **Find Coverage** button will be enabled and the **Billing Group** will be populated or require a selection to be made depending on how the group is setup. Then select the **Plan**.



Enroll Member: Coverage - Medical

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1. If the subscriber has **Specialty (Medical, Dental or Vision) and/or Basic Life and AD&D** coverage, enter information in the fields shown.
2. **NOTE: Dental and Vision** are currently not applicable to **UnitedHealthcare HMO**.
3. Click **Next**.

Dental Information

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

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

Billing Group *
Group Desc

Coverage Population *
POP1 - POP1

Plan *
26071100 - plan dental | Dental DP604

Vision Information

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

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

Billing Group *
1362976-Bill Group Desc

Coverage Population *
POP1 - POP1

Plan *
26071101 - plan vision | Vision VH076

Basic Life Information

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

Billing Group *
1362976-Bill Group Desc

Coverage Population *
Select Population

Plan *
Select Plan

AD&D Information

Billing Group *
1362976-Bill Group Desc

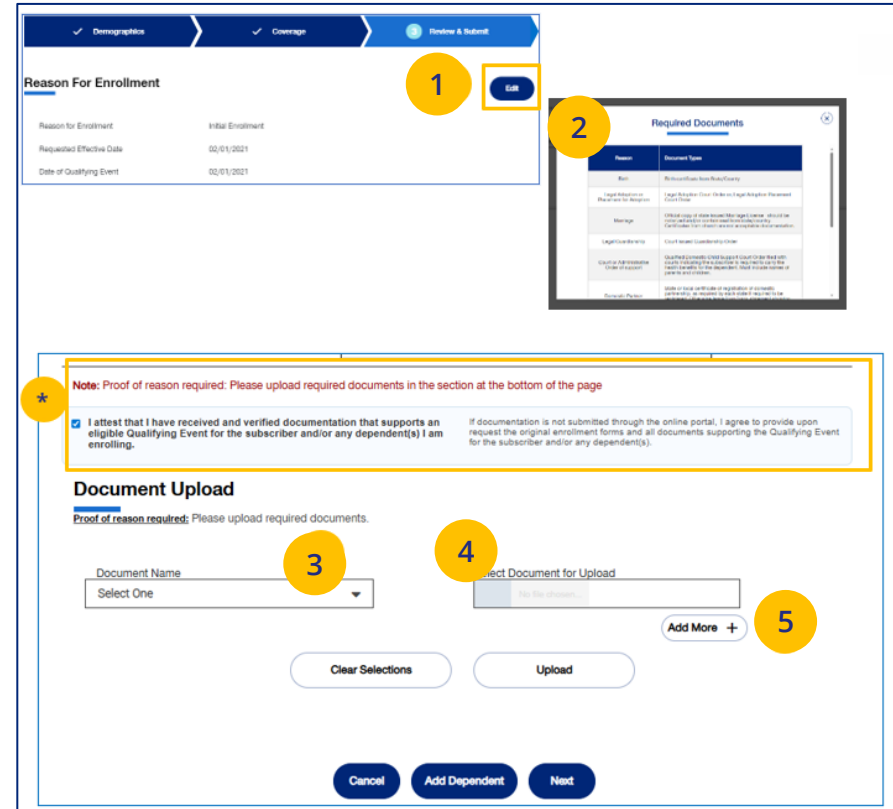
Plan *
Select Plan

Cancel Previous Next

Enroll Member: Document Upload, Review & Submit

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1. Review the information. If edits are needed on any of the information shown, click **Edit**.
2. Document upload section may appear at the bottom. Clicking **Document List** opens pop up for more information on document types based on enrollment reason. This is optional.*
***Please note:** The upload of supporting documentation is required for Small Business groups in: NJ, MD, VA, WV – all Qualifying Event enrollments, NY – for New Hire Qualifying Event enrollments – only if group has 5 or fewer enrolled subscribers. An attestation field appears and user will be unable to proceed until document is uploaded.
3. Select document type from the drop down.
4. Upload document through “**Select Document for Upload**”
5. If you have more than one document to upload, click on “**Add More +**”.



Reason For Enrollment

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

Required Documents

Reason	Document Type
New Hire	Required: New Hire Qualifying Event Form
Legal Addition or Removal for Dependent	Legal Addition or Removal for Dependent Qualifying Event Form
Marriage	Required: Copy of State or Federal Marriage License. Must be a certified copy and include the names of the bride and groom.
Legal Guardianship	Court order establishing guardianship
Qualifying Event	Qualifying Event Form (Required for all Qualifying Events except for New Hire and Legal Addition or Removal for Dependent. Must include a copy of the Qualifying Event Form and a copy of the document supporting the Qualifying Event.)

Note: Proof of reason required: Please upload required documents in the section at the bottom of the page

☒ I attest that I have received and verified documentation that supports an eligible Qualifying Event for the subscriber and/or any dependent(s) I am enrolling.

If documentation is not submitted through the online portal, I agree to provide upon request the original enrollment forms and all documents supporting the Qualifying Event for the subscriber and/or any dependent(s).

Document Upload

Proof of reason required: Please upload required documents.

Document Name: Select One

Select Document for Upload

Add More +

Clear Selections Upload

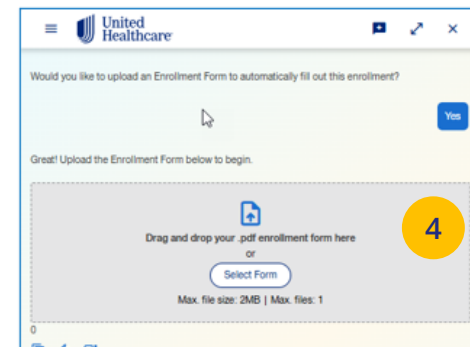
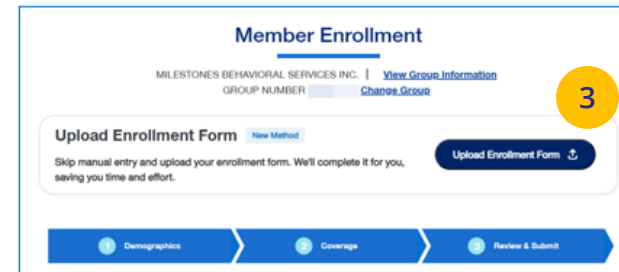
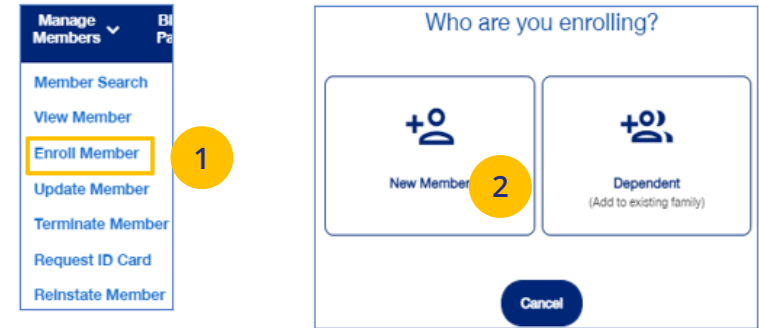
Cancel Add Dependent Next

Enroll Member: Auto Enroll Document Upload (Optional)

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You have the option to upload an enrollment form to autofill enrollment fields.

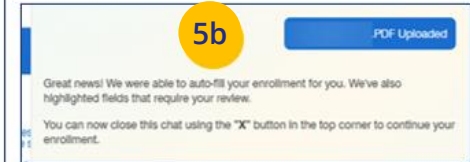
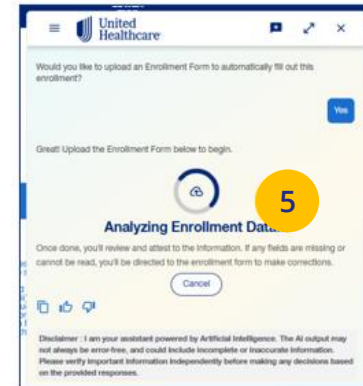
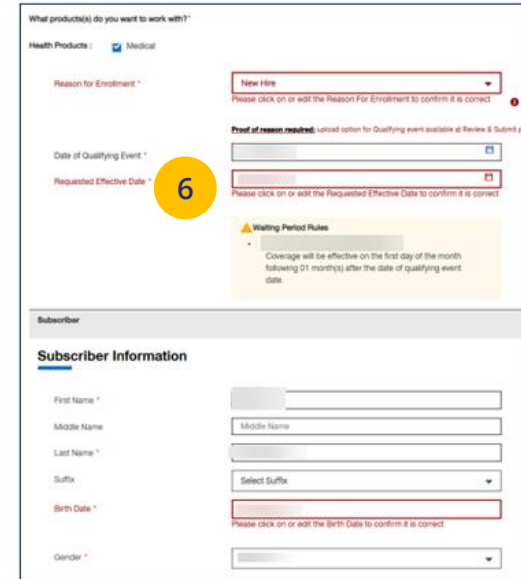
1. Click Manage Members, then **Enroll Member**.
2. Click **New Member**.
3. Click **Upload Enrollment Form** button. If prompted, select **Yes, I want to auto-fill my enrollment**.
4. Drag and drop the .pdf enrollment form or click **Select Form** to locate the file.



Enroll Member: Auto Enroll Document Upload (Optional)

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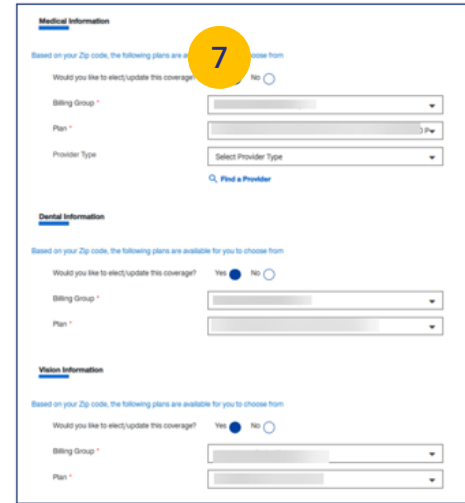
5. Once the form is selected, it is analyzed.
 - a) If form is not analyzed successfully, it will not be uploaded. You will be prompted to enter enrollment information manually.
 - b) If form is analyzed and successfully uploaded, you'll receive a message, you'll receive a confirmation message. You'll be prompted to review highlighted fields for accuracy.
6. Blank fields are highlighted for you to review. Edit the field or click the field to advance the enrollment. All highlighted fields must be edited or clicked in order to advance.

Enroll Member: Auto Enroll Document Upload (Optional)

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7. Plan selection is made if the group only offers one plan. Otherwise, this requires a manual selection.
8. When ready to submit, you will be prompted to review the page for accuracy. If the form is complete and accurate, then check the attestation box and click **Submit**.



Medical Information

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

Would you like to elect/update this coverage? Yes ☐ No ☐

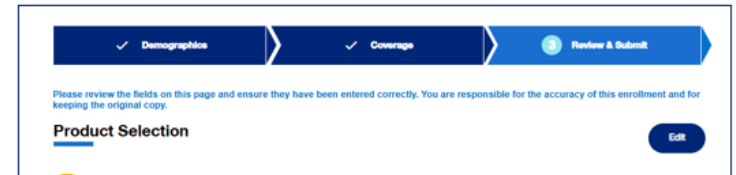
Billing Group *

Plan *

Provider Type

Select Provider Type

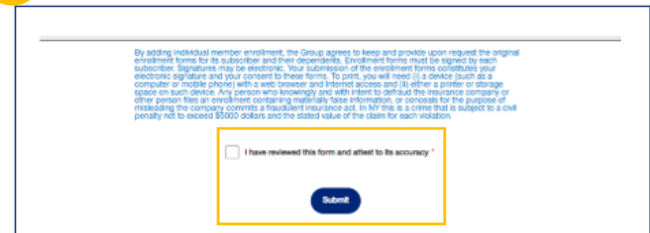
[Find a Provider](#)



✓ Demographics > ✓ Coverage > 8 Review & Submit

Please review the fields on this page and ensure they have been entered correctly. You are responsible for the accuracy of this enrollment and for keeping the original copy.

Product Selection [Edit](#)



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. Your submission of the enrollment forms constitutes your electronic signature and your consent to these terms. To print, you will need (i) a device (such as a computer or mobile phone) with a web browser and Internet access and (ii) either a printer or storage space on such device. Any person who knowingly and with intent to defraud the insurance company or other person files an enrollment containing materially false information, or consents 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 \$500 dollars and the stated value of the claim for each violation.

☐ I have reviewed this form and attest to its accuracy *

Submit

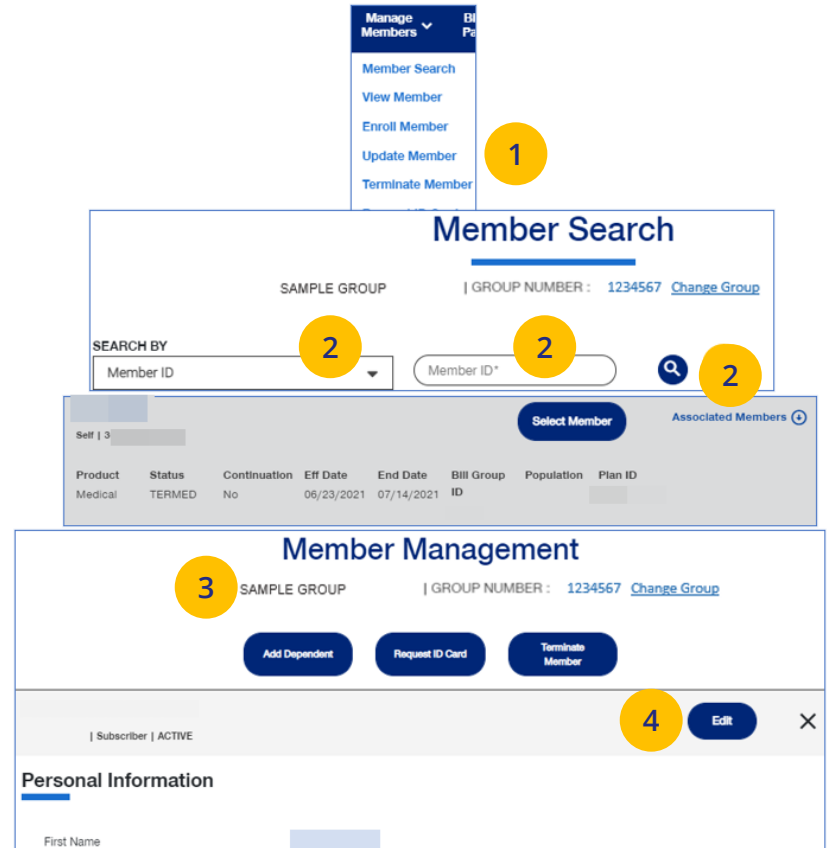
Update Member

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

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

1. Click **Manage Members** and select **Update Member**. **NOTE:** Enter a group number if prompted.
2. Select the search criteria from the **Search By** drop-down and enter the search criteria.
3. Click the **Search** icon.
 - If searching by any of the Name options, the search results will be shown. Click **Select Member**. The **Member Management** screen displays.
 - If searching by Member ID, the **Member Management** screen displays.**NOTE:** The **Member Management** screen shows personal, contact and coverage information, including links to Plan Documents (if available).
4. Click the **Edit** button.



The screenshot illustrates the process of updating a member record. It shows the 'Manage Members' dropdown menu with 'Update Member' selected (1). The 'Member Search' screen displays the 'SEARCH BY' dropdown set to 'Member ID' (2) and the 'Member ID*' input field (2). The 'Search' icon (2) is also highlighted. Below the search results, the 'Select Member' button is visible. The 'Member Management' screen shows the 'Edit' button (4) next to the member's status (ACTIVE).

Member Search

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

SEARCH BY: Member ID (2) Member ID* (2) Search (2)

Select Member Associated Members

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

Member Management

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

Add Dependent Request ID Card Terminate Member

| Subscriber | ACTIVE (4) Edit X

Personal Information

First Name

Update Member

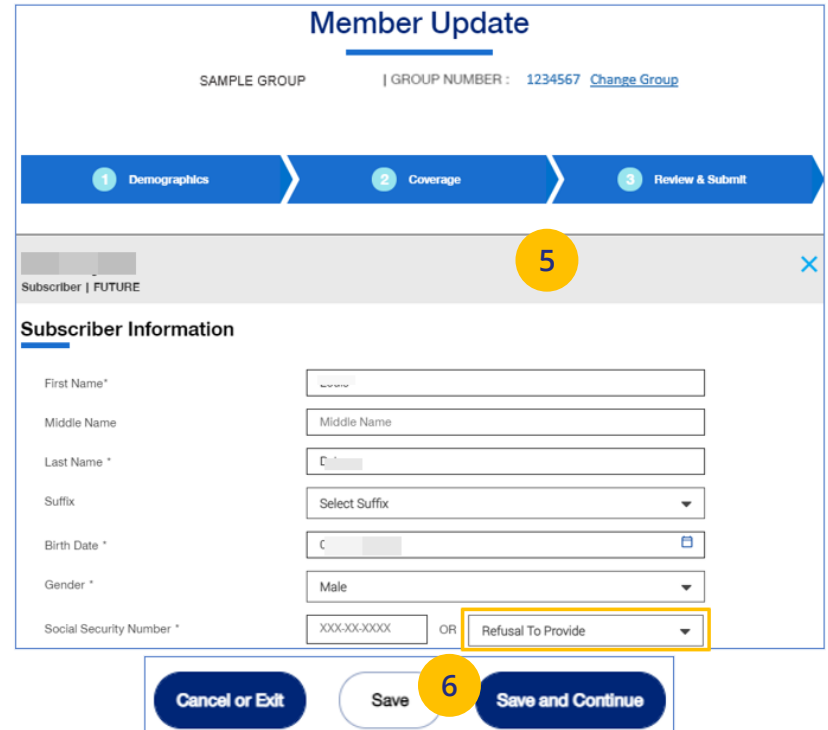
[TABLE OF CONTENTS](#)

- Update the 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

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

1 Demographics 2 Coverage 3 Review & Submit

Subscriber | FUTURE

Subscriber Information

First Name*

Middle Name

Last Name*

Suffix

Birth Date*

Gender*

Social Security Number* OR

Cancel or Exit Save Save and Continue

Update Member

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

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

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

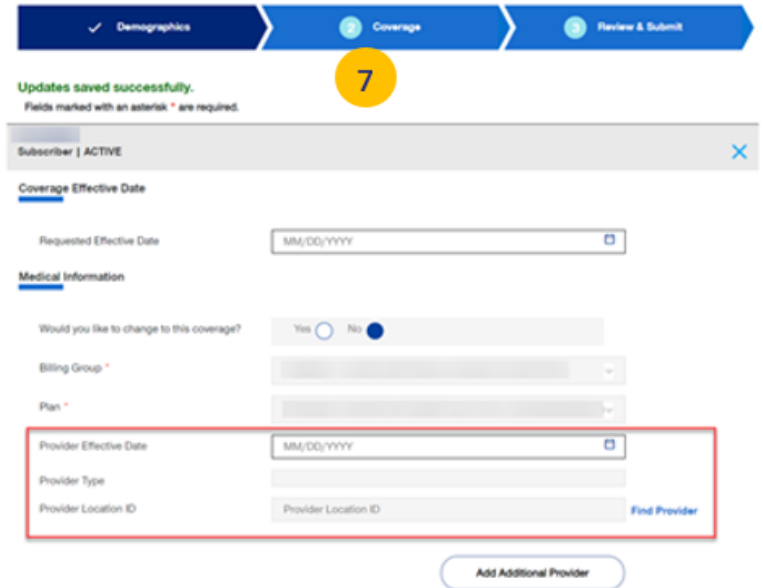
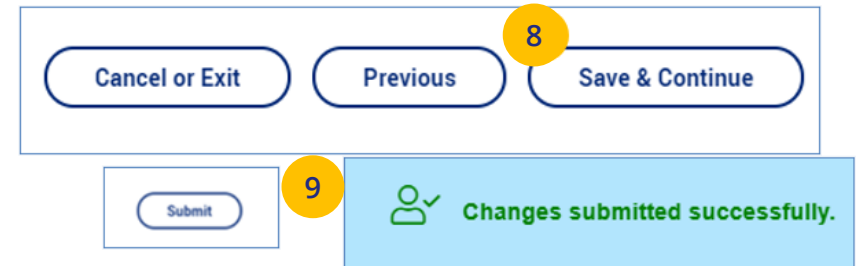
NOTE: This page can look a little different based on either the coverage offered or on the group type.

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

Billing Group *

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

8. Click **Save & Continue**.
9. 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.

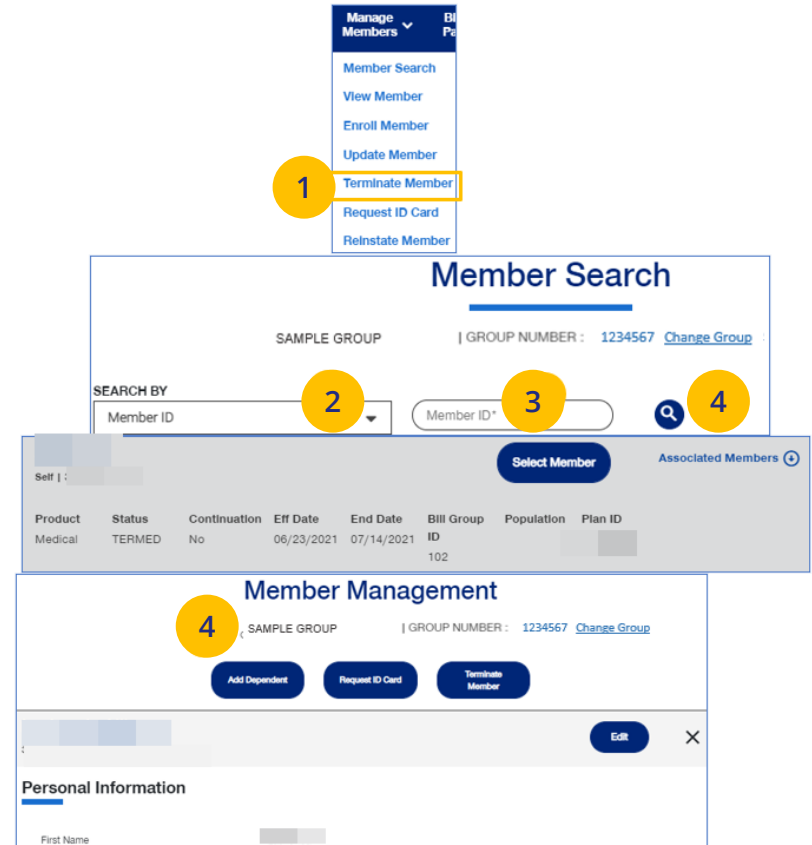
Terminate Member's Coverage

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1. Select **Manage Members** and **Terminate Member**.

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

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.



Manage Members dropdown menu:

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

Member Search screen:

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

SEARCH BY: Member ID (dropdown) Member ID* (input) [Search icon]

Buttons: **Select Member** Associated Members (+)

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

Member Management screen:

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

Buttons: **Add Dependent** **Request ID Card** **Terminate Member**

Buttons: **Edit** **X**

Personal Information

First Name

Terminate Member's Coverage

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- Click **Terminate Member**. The **Terminate Member Benefits** screen displays.
- For **Termination Reason**, use **Select Reason** dropdown to enter the termination reason.

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

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

NOTE: Help with Determining Date: When you click the Help with Determining Date link, the following pop-up displays.

Help with Determining Date

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

- Click the information icon at the end of the **Requested Effective Date** field. A **Waiting Period Rules** pop-up box indicates the specific rules that will apply for termination dates based on the group contract. Click the X in the upper-right corner to the **Terminate Member Benefits** screen. This does not apply to **UnitedHealthcare HMO** users.

Member Management

SAMPLE GROUP

GROUP NUMBER : 1234567 [Change Group](#)

Add Dependent

Request ID Card

Terminate Member

5

Louis Dylan

Subscriber | FUTURE

Edit

X

Personal Information

Terminate Member Benefits

SAMPLE GROUP

GROUP NUMBER : 1234567 [Change Group](#)

Reason for Termination

Termination Reason*

6

Select Reason

Requested Termination Date*

7

MM/DD/YYYY

8

Help with Determining Date

9

Waiting Period Rules

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

Terminate Member's Coverage

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9. Scroll down to the **Member Information** section and click the **Select** box for each member whose coverage is being terminated.
10. Click **Next**. The **Terminate Member Benefits** screen displays, asking you to confirm that the information is correct.
 - If you terminate the coverage for the subscriber, the system will also select all dependents for termination.
11. Click **Terminate**. A message displays telling you the member has been terminated successfully.

NOTE:

- **Print Termination Confirmation Option** – Click the **Print** icon to print the termination confirmation.
- **Group Termination:** When a Group is terminated, Broker and UHC Employee access to the Group is no longer available from the UHCeServices website (as of the Group termination date).

Member Information

Multiple selections are allowed. Please select each applicable row.

Member Name	Member ID	Date of Birth	Effective Date	Status	Select
John Doe Subscriber Male		01/01/1972	04/01/2020	ACTIVE	☒ Medical
Jane Doe Spouse Female		02/01/1972	04/01/2020	ACTIVE	☒ Medical
Jonathan Doe Child Male		07/19/2001	04/01/2020	ACTIVE	☒ Medical
Janet Doe Child Female		08/11/2006	04/01/2020	ACTIVE	☒ Medical
Jack Doe Child Male		08/08/1998	04/01/2020	ACTIVE	☒ 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, a person who commits a fraudulent insurance act is subject to a civil penalty not to exceed \$5000 dollars and the stated value of the claim for each violation.

[Cancel](#) [Next](#)

Terminate Member Benefits

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

Member Information

Please confirm that following information is correct and click Terminate.

Subscriber	Plan Type	Termination Reason	Requested Termination Date
Subscriber Male	Medical	Left Employer	04/24/2021

[11](#) [Terminate](#) [Cancel](#)

[Member Management](#)

Termination Confirmation

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

Member Information ⓘ You may want to print this page for your records.

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

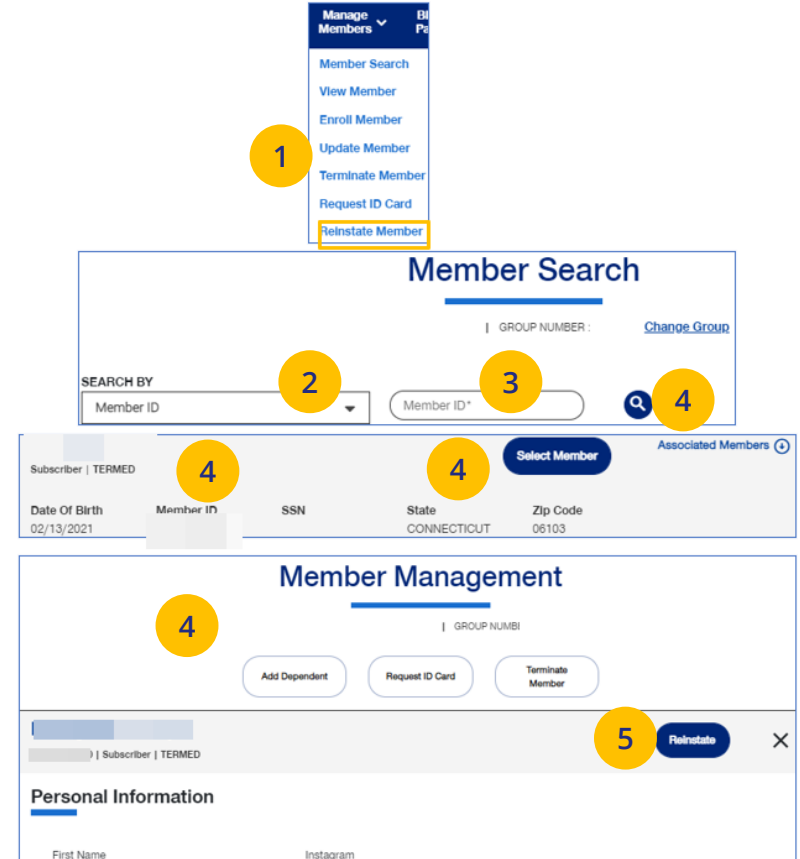
[Return](#)

Reinstate Member

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

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 the UnitedHealthcare Manage Members interface. The interface is divided into several sections:

- Manage Members Menu:** A dropdown menu is shown with options: Member Search, View Member, Enroll Member, Update Member, Terminate Member, Request ID Card, and **Reinstate Member** (highlighted with a yellow box and a yellow circle with the number 1).
- Member Search Section:**
 - SEARCH BY:** A dropdown menu is set to "Member ID" (highlighted with a yellow circle with the number 2).
 - Member ID*:** A text input field for the member ID (highlighted with a yellow circle with the number 3).
 - Search Icon:** A magnifying glass icon to initiate the search (highlighted with a yellow circle with the number 4).
 - Select Member:** A blue button to select the member from search results (highlighted with a yellow circle with the number 4).
- Member Management Section:**
 - Member ID:** A text input field for the member ID (highlighted with a yellow circle with the number 4).
 - Reinstate:** A blue button to reinstate the member (highlighted with a yellow circle with the number 5).

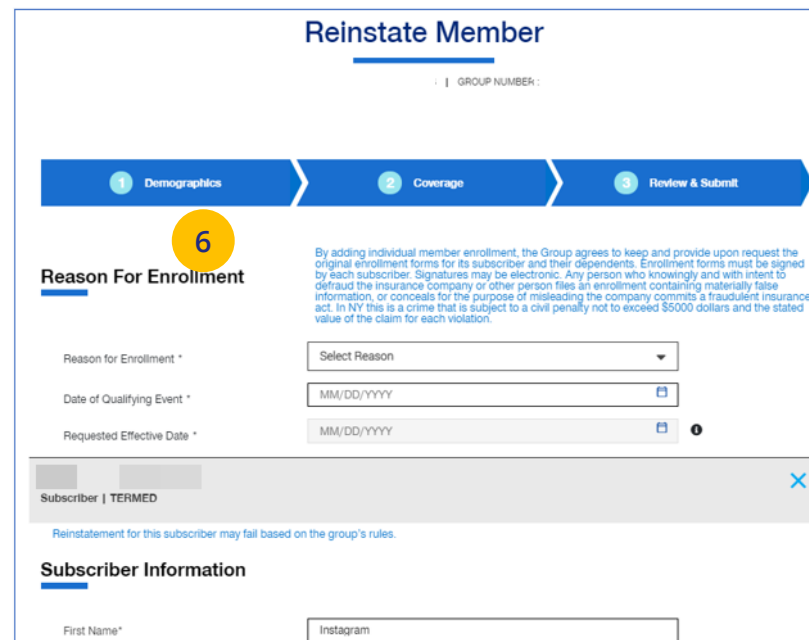
Reinstate Member

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

NOTE:

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

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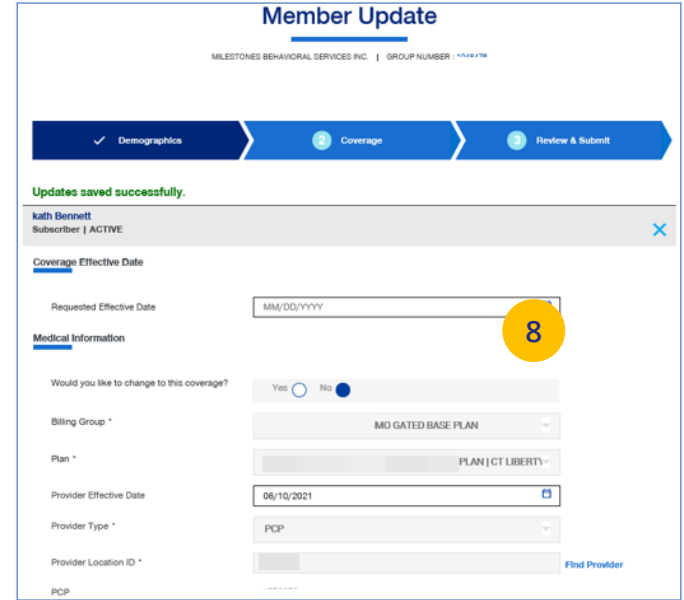
8. Update information in the **Coverage** section if needed. Scroll to see all fields. **NOTE:** In the **Billing Group** area, you can narrow your search for a billing group by typing in the first few letters or number in the billing group.

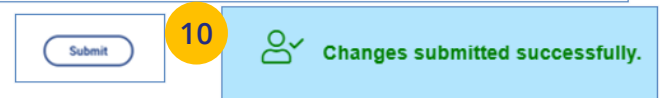
Billing Group *

NOTE: Billing Group – For UnitedHealthcare HMO users, billing Group is not available.

9. Click **Save & Continue**.
10. When updates are complete, review your information and click **Submit**. A “Changes submitted successfully” message will display.

Newborn to Child Status – If a child dependent is in temporary **newborn** status, coverage terminates unless the child is enrolled as a new dependent. After newborn is enrolled, status = **child**. If the child dependent has already been terminated, go through the reinstatement process, if needed, to reinstate. **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 the number listed under **Contact Us**.



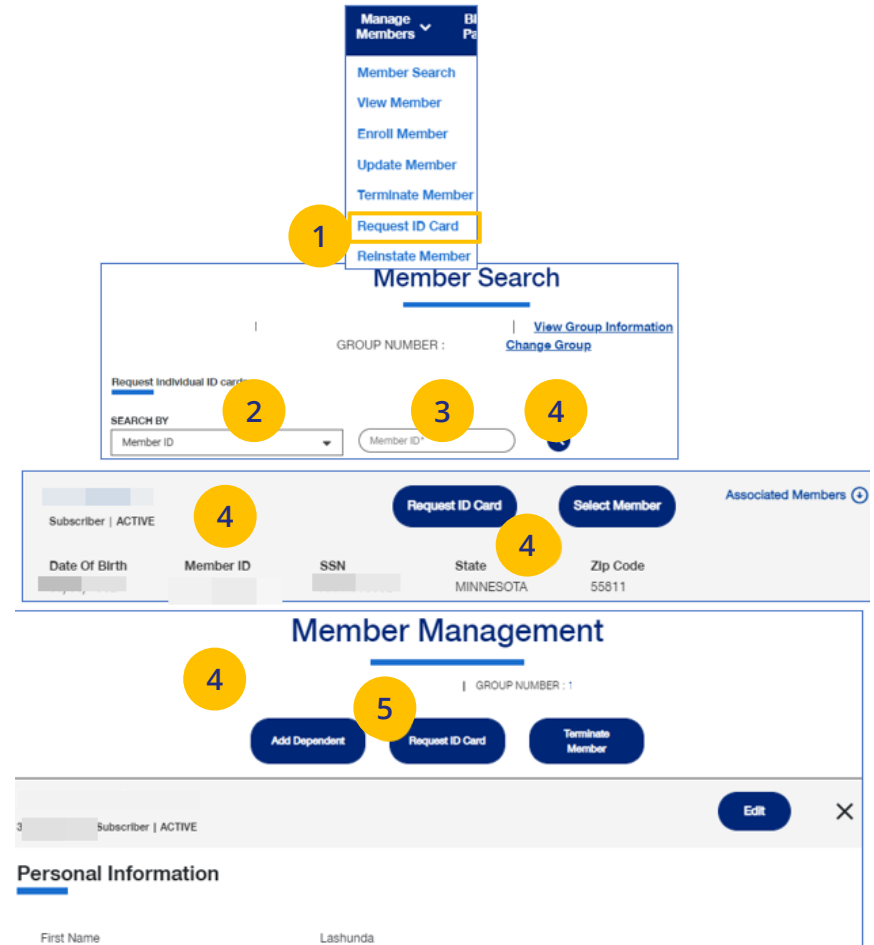


Request Health Plan ID Card

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Request an ID card to be mailed or printed for a member.

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



The screenshot illustrates the process to request a health plan ID card, with numbered callouts (1-5) indicating the steps:

- 1**: A dropdown menu is open under "Manage Members", and "Request ID Card" is highlighted.
- 2**: The "Member Search" screen shows the "SEARCH BY" dropdown menu set to "Member ID".
- 3**: The "Member ID" search criteria is entered into the search field.
- 4**: The "Search" button (magnifying glass icon) is clicked.
- 4**: The "Member Management" screen displays member details (Subscriber | ACTIVE, Date Of Birth, Member ID, SSN, State: MINNESOTA, Zip Code: 55811). The "Request ID Card" button is highlighted.
- 5**: The "Request ID Card" button is clicked on the "Member Management" screen.

Below the "Member Management" section, the "Personal Information" section is partially visible, showing the member's first name as "Lashunda".

Request Health Plan ID Card

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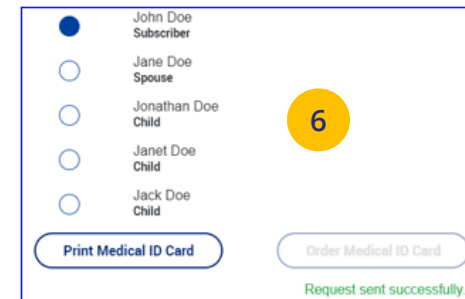
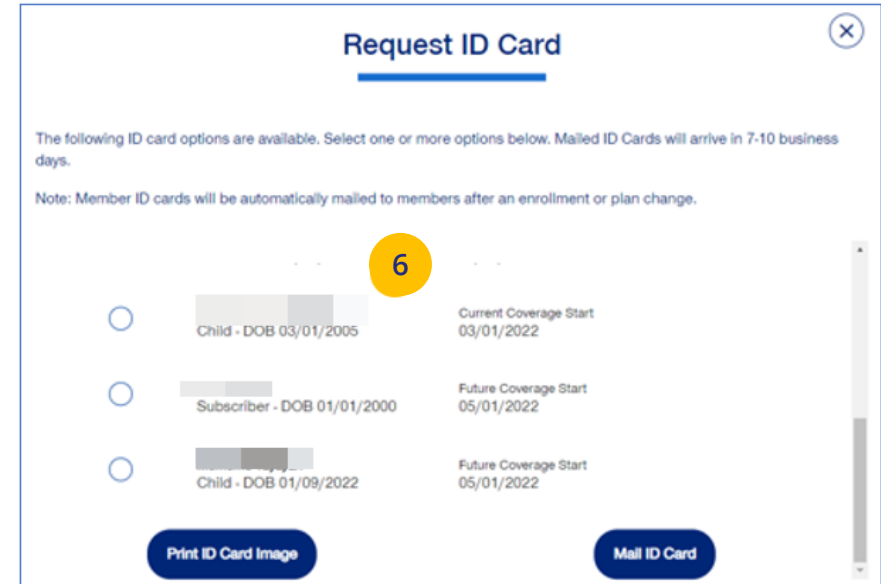
- Select the member and (1) click **Print ID Card** to print the card or save it as a pdf, **or** (2) click **Order ID Card** to order the card. The message "Request sent successfully" displays. Repeat this for other members or dependents if needed.

NOTE:

- If any dependent is classified as "Newborn," their status must be changed to "Child" before a Health Plan ID card can be ordered or printed.
- If there is a member change, it will take 24 to 48 hours for a new ID card to be available.
- 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**.



- Vision ID cards** are not currently available
- Only **Medical ID Cards** are available for **UnitedHealthcare HMO** users.



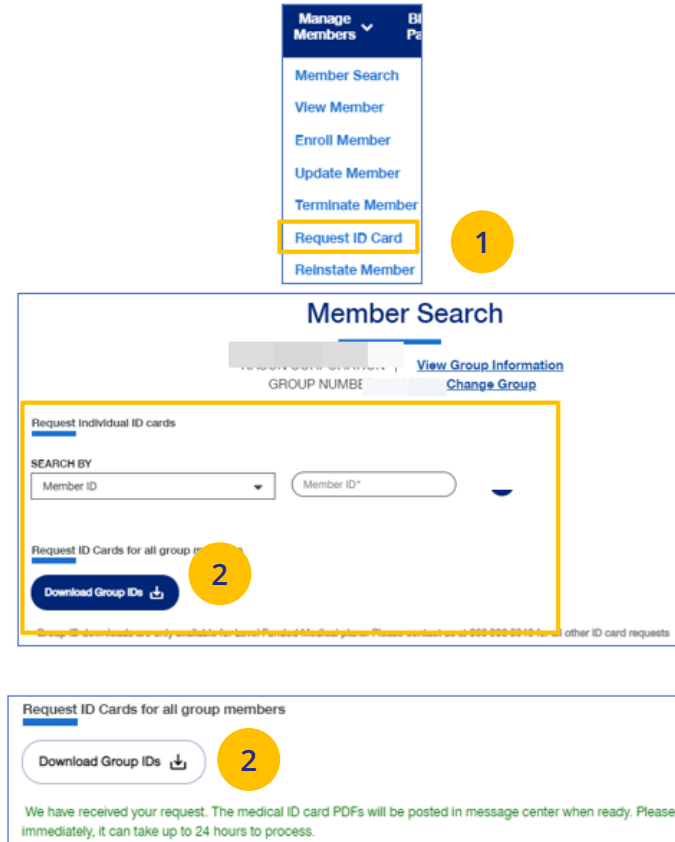
Request Health Plan ID Card for Entire Group (UHC and Oxford Level Funded Groups only)

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For UnitedHealthcare or Oxford Level Funded groups, you have the option to request health plan ID cards for all members in a group.

*This does not apply to Surest Level Funded Medical plans at this time.

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



The screenshot displays the UnitedHealthcare Manage Members interface. A dropdown menu for 'Manage Members' is open, showing options: Member Search, View Member, Enroll Member, Update Member, Terminate Member, **Request ID Card** (highlighted with a yellow box and a yellow circle with the number 1), and Reinstate Member. Below this, the 'Member Search' page is shown. It includes a search bar with 'SEARCH BY' and 'Member ID' dropdown, and a 'Member ID*' input field. A yellow box highlights the 'Request ID Cards for all group members' section, which contains a 'Download Group IDs' button (highlighted with a yellow box and a yellow circle with the number 2). A message at the bottom states: '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.'

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.
2. If the group has a payment due, then the **Quick Pay** screen appears where you can review and make the payment.
3. If the group does not have a payment due, then the **Invoices** page appears.

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.

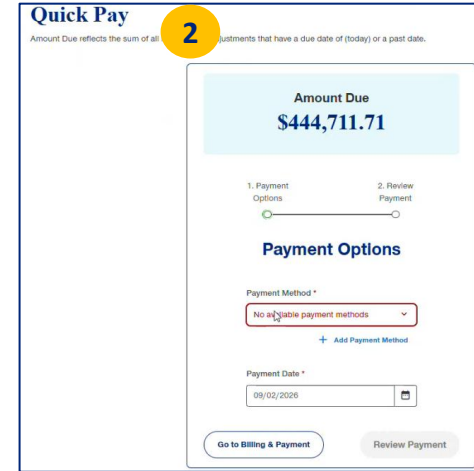
Billing & Payment

HOGE-MAN, 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](#)

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

Amount Due
\$444,711.71

1. Payment Options 2. Review Payment

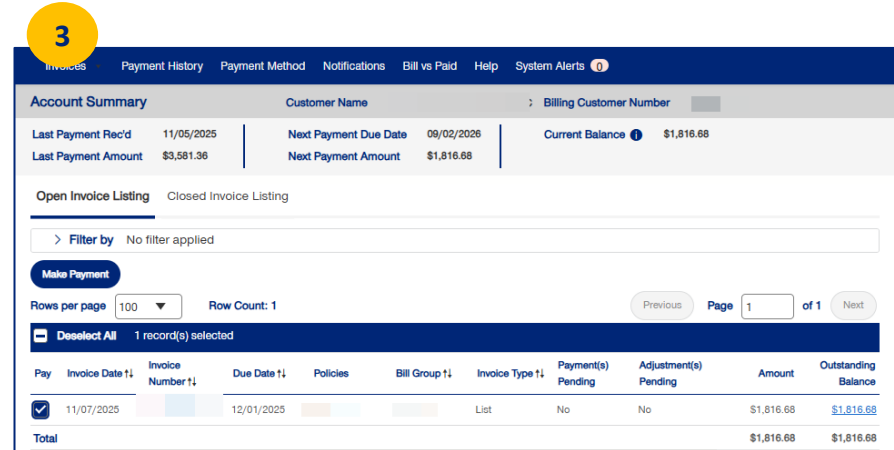
Payment Options

Payment Method *
No available payment methods

+ Add Payment Method

Payment Date *
09/02/2026

Go to Billing & Payment Review Payment



3

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

Account Summary Customer Name : Billing Customer Number

Last Payment Rec'd	11/05/2025	Next Payment Due Date	09/02/2026	Current Balance	\$1,816.68
Last Payment Amount	\$3,581.36	Next Payment Amount	\$1,816.68		

Open Invoice Listing Closed Invoice Listing

> Filter by No filter applied

Make Payment

Rows per page 100 Row Count: 1

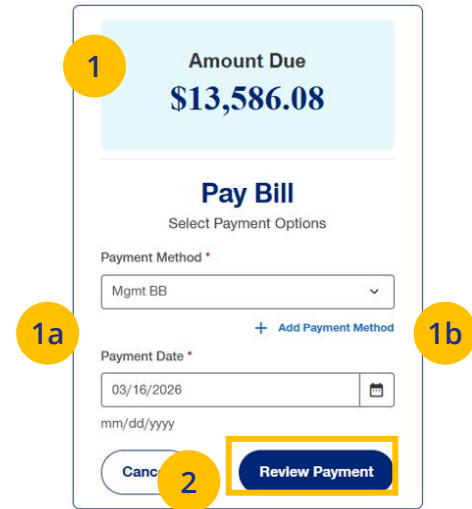
Deselect All 1 record(s) selected

Pay	Invoice Date †	Invoice Number †	Due Date †	Policies	Bill Group †	Invoice Type †	Payment(s) Pending	Adjustment(s) Pending	Amount	Outstanding Balance
☒	11/07/2025		12/01/2025			List	No	No	\$1,816.68	\$1,816.68
Total									\$1,816.68	\$1,816.68

Quick Pay

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- From the **Quick Pay** screen, you can:
 - Select the payment method and date.
 - Add a payment method, if needed.
- To make a payment, click **Review Payment**.
- Review payment details and click **Submit Payment**.
- You'll receive confirmation on your payment with a link to download a PDF.



1 Amount Due
\$13,586.08

Pay Bill
Select Payment Options

Payment Method *
Mgmt BB + Add Payment Method

Payment Date *
03/16/2026 
mm/dd/yyyy

1a **2** **1b**

Cancel **Review Payment**

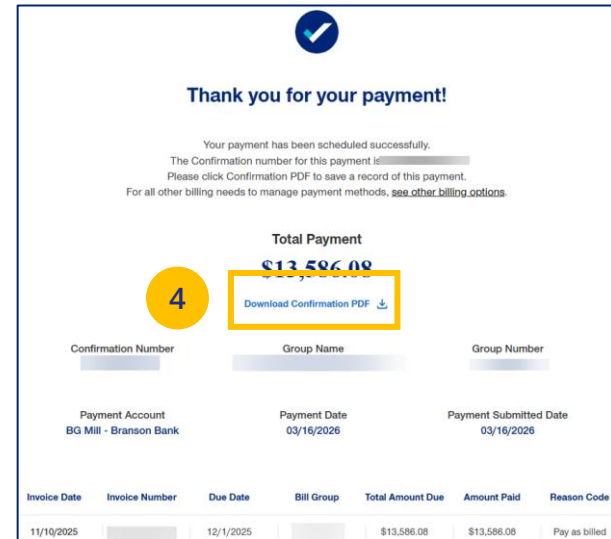


Amount Due
\$13,586.08

3 **Pay Bill**
Review Payment Details

Payment Method: Mgmt BB Payment Date: 03/16/2026

Previous **Submit Payment**





Thank you for your payment!

Your payment has been scheduled successfully.
The Confirmation number for this payment is 
Please click Confirmation PDF to save a record of this payment.
For all other billing needs to manage payment methods, [see other billing options](#).

4 Total Payment
\$13,586.08
[Download Confirmation PDF](#) 

Confirmation Number	Group Name	Group Number

Payment Account	Payment Date	Payment Submitted Date
BG Mill - Branson Bank	03/16/2026	03/16/2026

Invoice Date	Invoice Number	Due Date	Bill Group	Total Amount Due	Amount Paid	Reason Code
11/10/2025		12/1/2025		\$13,586.08	\$13,586.08	Pay as billed

Billing & Payment: View Invoices

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

1. Click the **Billing & Payment** tab. The **Billing & Payment** selection screen displays.
2. If no payment is due, then the **Invoices** page appears.
3. If the **Quick Pay** screen appears, click the Go to Billing & Payment button.



Invoices

Payment History

Payment Method

Notifications

Bill vs Paid

Help

System Alerts

Account Summary

Customer Name

Billing Customer Number

Last Payment Rec'd

11/05/2025

Next Payment Due Date

09/02/2026

Current Balance

\$1,816.68

Last Payment Amount

\$3,581.36

Next Payment Amount

\$1,816.68

Open Invoice Listing

Closed Invoice Listing

> Filter by

No filter applied

Make Payment

Rows per page

100

Row Count: 1

Previous

Page 1 of 1

Next

Deselect All

1 record(s) selected

Pay	Invoice Date ↑	Invoice Number ↑	Due Date ↑	Policies	Bill Group ↑	Invoice Type ↑	Payment(s) Pending	Adjustment(s) Pending	Amount	Outstanding Balance
☒	11/07/2025		12/01/2025			List	No	No	\$1,816.68	\$1,816.68
Total									\$1,816.68	\$1,816.68

3

Quick Pay

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

Amount Due

\$444,711.71

1. Payment Options

2. Review Payment

Payment Options

Payment Method *

No available payment methods

+ Add Payment Method

Payment Date *

09/02/2026

Go to Billing & Payment

Review Payment

Member & Subscriber Lists (Census)

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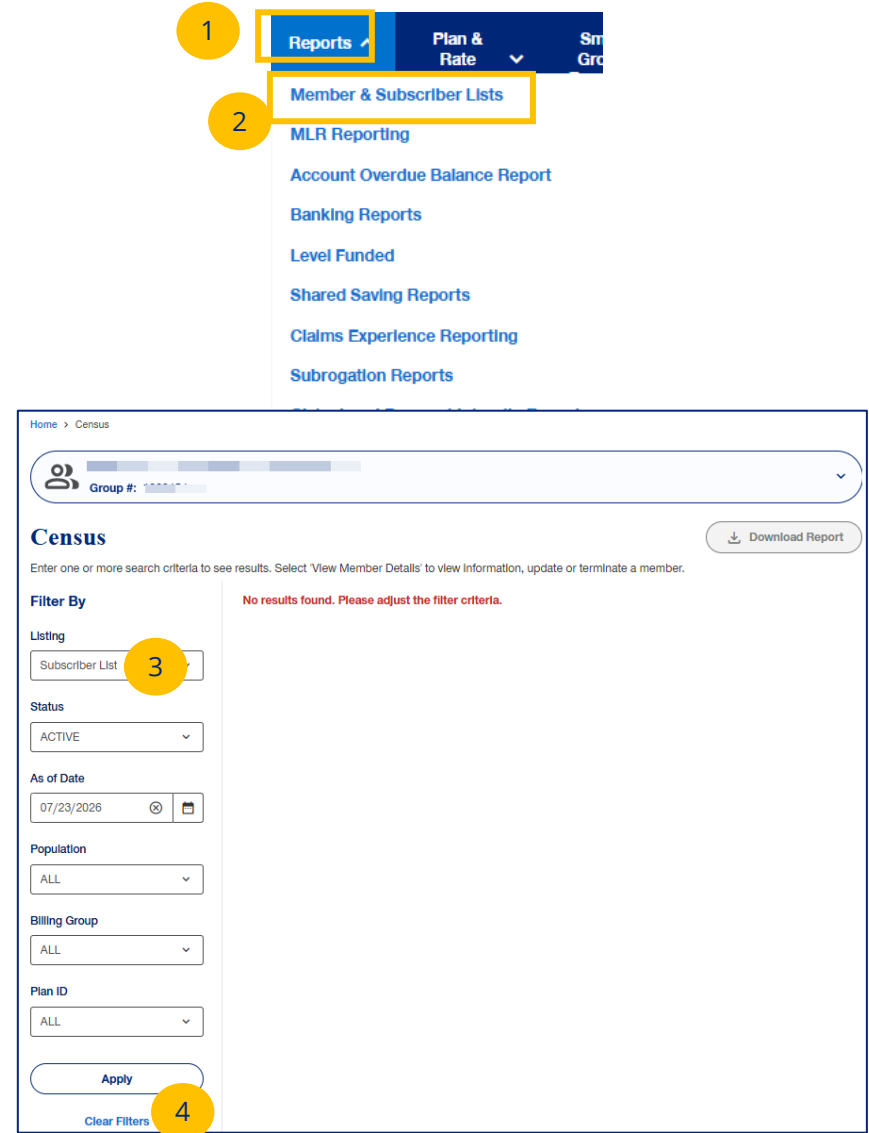
View all subscribers or members affiliated with the Group.

NOTE: This is the only report option available for UnitedHealthcare HMO users.

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

NOTE:

- **Member List** is the default report shown when the screen displays. Scroll down to view members in the report who met the default search criteria.
 - The **Select the Billing Group** and **Select the Plan ID** fields are not available for **UnitedHealthcare HMO** users.
3. **To Change the Search Criteria:** Use the dropdowns in each field to enter the needed information. Fields include:
 - Member List or Subscriber List
 - Status (All Including Complete, All Excluding Complete, Active, Pending, Termined, Incomplete)
 - As of Date
 - Population
 - Billing Group
 - Plan ID
 4. After selecting your search criteria, click **Apply**.



1. Click the **Reports** tab

2. Select **Member & Subscriber Lists (Census)**. The **Member & Subscriber Lists** screen is shown.

NOTE:

- **Member List** is the default report shown when the screen displays. Scroll down to view members in the report who met the default search criteria.
- The **Select the Billing Group** and **Select the Plan ID** fields are not available for **UnitedHealthcare HMO** users.

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

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

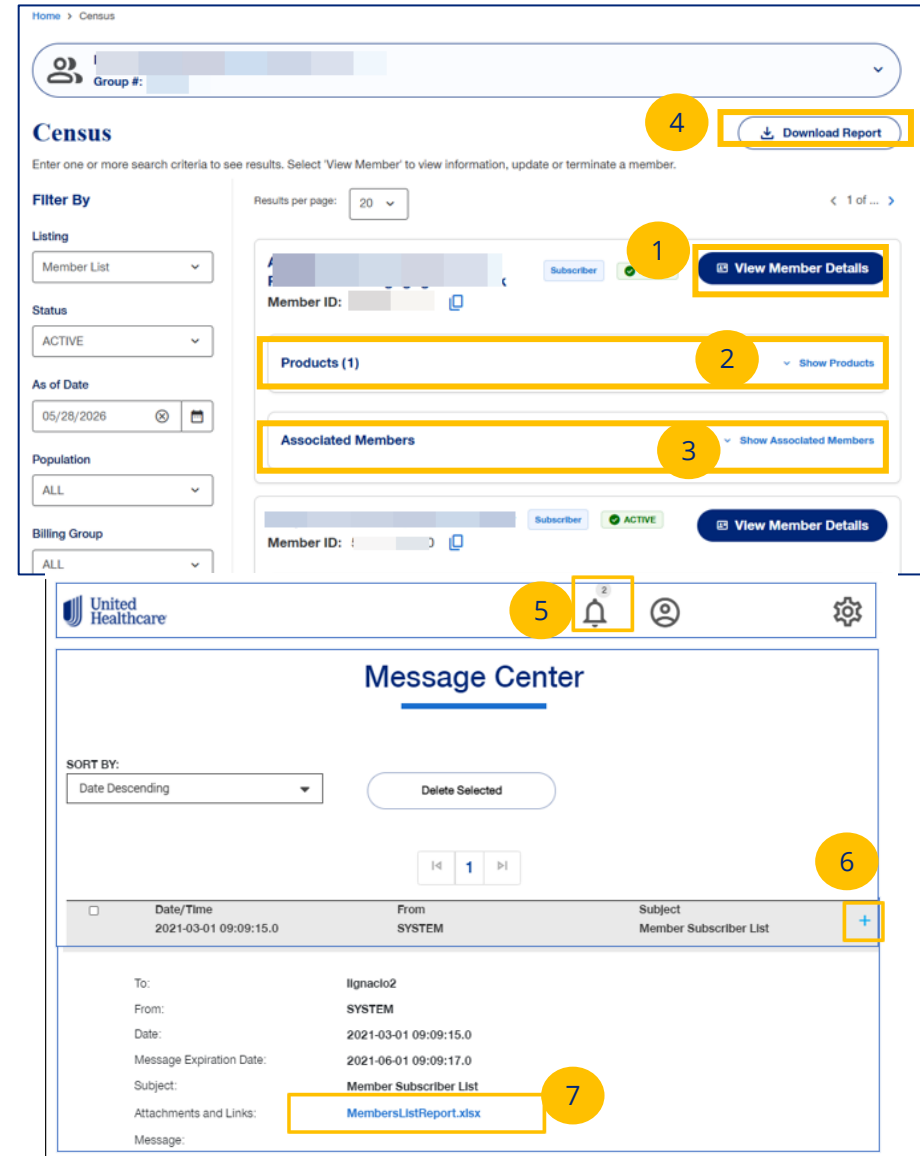
4. After selecting your search criteria, click **Apply**.

Member & Subscriber Lists (Census)

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The results appear on the right. You can:

1. **View Member Details**, which navigates to the Member Management page.
2. Click to expand and **View Products**, which shows status and effective date by product.
3. Click to expand and view **Associated members**.
4. **Download Report** to download the report to excel. A message indicates that you will be notified in **Message Center** when your report is ready. When the report is ready a number will be displayed next to the bell icon.
5. Click on the bell icon to open the **Message Center**.
6. Click on the plus sign.
7. Click on the attachment link to display the report.
 - 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.



Home > Census

Group #: [Redacted]

Census

Enter one or more search criteria to see results. Select 'View Member' to view information, update or terminate a member.

Filter By

Listing: Member List

Status: ACTIVE

As of Date: 05/28/2026

Population: ALL

Billing Group: ALL

Results per page: 20

1 of 1

1. View Member Details

2. Show Products

3. Show Associated Members

4. Download Report

5. Bell icon

6. Plus sign

7. Attachment link

Message Center

SORT BY: Date Descending

Delete Selected

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

Message details:

To: llnacio2

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

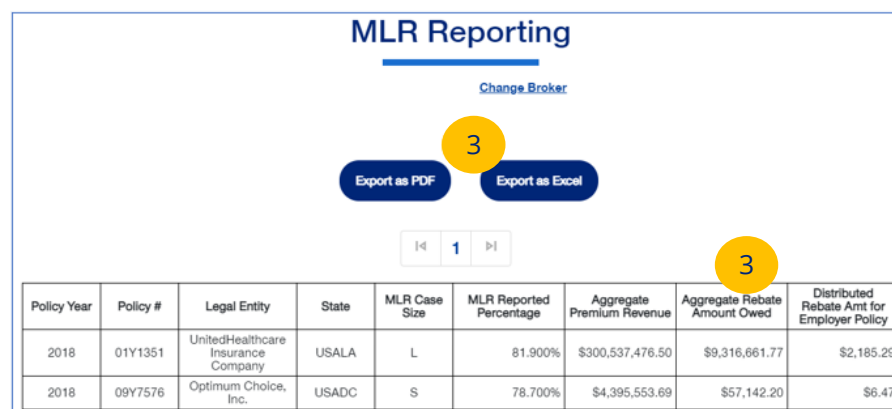
MLR Reporting

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

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

1. Click the **Reports** tab.
2. Select **MLR Reporting**. The **MLR Reporting** screen displays with the report.
 - 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**.
3. 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.



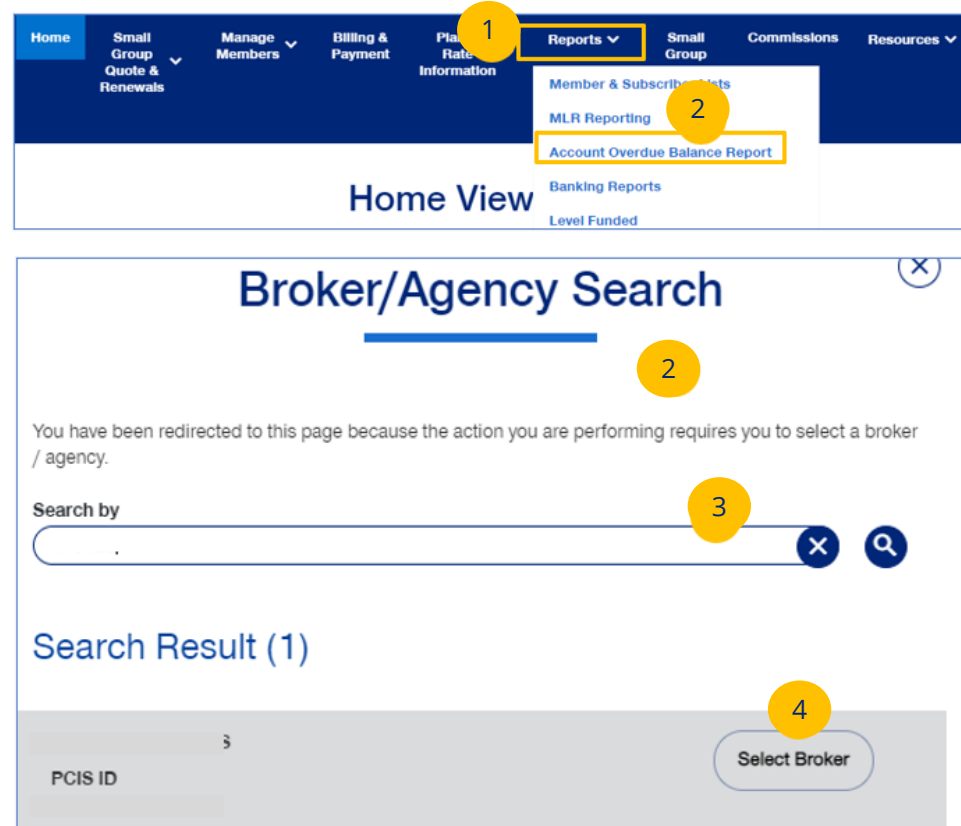
Account Overdue Balance Report

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

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

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



The screenshot displays the UnitedHealthcare E&I Sales Readiness interface. The top navigation bar includes tabs: Home, Small Group Quote & Renewals, Manage Members, Billing & Payment, Plan Rate Information, **Reports** (highlighted with a yellow circle 1), Small Group, Commissions, and Resources. A dropdown menu for the Reports tab is open, showing options: Member & Subscriber Lists, MLR Reporting, **Account Overdue Balance Report** (highlighted with a yellow circle 2), Banking Reports, and Level Funded. Below the navigation bar, the 'Home View' section is visible. The main content area is titled 'Broker/Agency Search' and contains a message: 'You have been redirected to this page because the action you are performing requires you to select a broker / agency.' Below this message is a 'Search by' input field (highlighted with a yellow circle 3) and a search button. The search results section, titled 'Search Result (1)', shows a table with one entry. The entry has a 'PCIS ID' field (highlighted with a yellow circle 4) and a 'Select Broker' button.

Account Overdue Balance Report (continued)

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To change your search criteria:

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

NOTE:

- The system will look for and display the five most recent late groups or terminations reports for each group the broker is associated.
- Download Report** – To download the report, click **Download Report**. An alert displays on the message icon when the report is ready.
- if no reports are available for the group, a message displays.

Account Overdue Balance Report

[Change Broker](#)

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

Select the Report Type
Late Groups

Report Date
2020-11-03

Apply

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

Download

Results (1)

1

Broker Name	Employer Name	Customer No.	Policy No.	Bill Group	Pending Term Date	Total Past Due Balance	Customer Balance	Past Due Aging					Most Recent Payment	Payment Date	Current Past due balance as of 10/10/2021
								0-30 Days	31-60 Days	61-90 Days	91-120 Days	>120 Days			
					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 Termined Group reports available

Select the Report Type
Terminated Groups

Report Date

Banking Reports

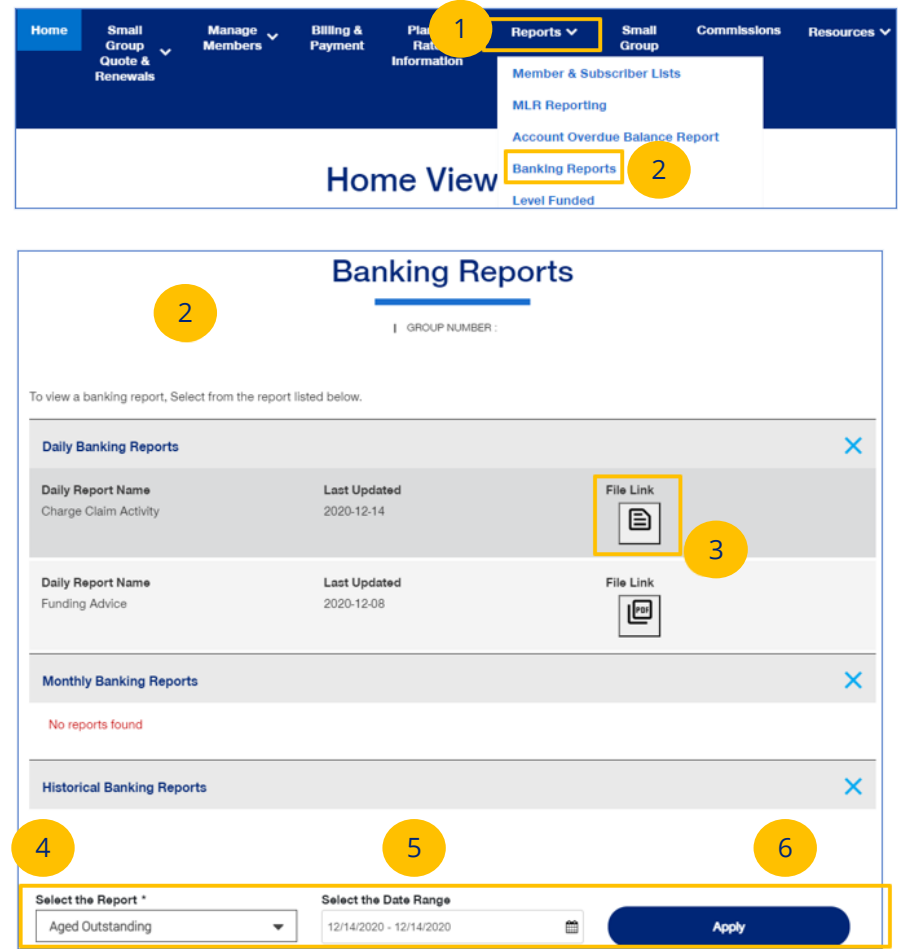
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The **Banking Reports** tab allows you to generate the daily, monthly and historical banking reports for a specific Group.

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

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

1. Click the **Reports** tab.
2. Select **Banking Reports**. The **Banking Reports** window displays with the Daily, Monthly and Historical Banking reports.
3. Click the specific **File Link** to view the report you need.
4. You can generate and view different reports using the dropdown. Select the report you need from the **Select the Report** dropdown list.
5. Select the date range you need in the **Select the Date Range** field.
6. Click **Apply** to display the report.



The screenshot shows the UnitedHealthcare portal interface. At the top, the navigation bar includes 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 the Reports tab 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 is the "Home View" section. 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."

The interface displays three sections of reports:

- Daily Banking Reports**: Contains a table with two rows. The first row is "Charge Claim Activity" (Last Updated: 2020-12-14) with a "File Link" icon (highlighted with a yellow box and callout 3). The second row is "Funding Advice" (Last Updated: 2020-12-08) with a "File Link" icon.
- Monthly Banking Reports**: Displays "No reports found".
- Historical Banking Reports**: Currently empty.

At the bottom, there is a filter section with two dropdowns: "Select the Report *" (callout 4) showing "Aged Outstanding" and "Select the Date Range" (callout 5) showing "12/14/2020 - 12/14/2020". An "Apply" button (callout 6) is located to the right of these dropdowns.

Banking Reports

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Here is a list of available banking 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 been 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 of all claim charge items at the member level <u>on a daily basis</u>	Monthly

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

Level Funded

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

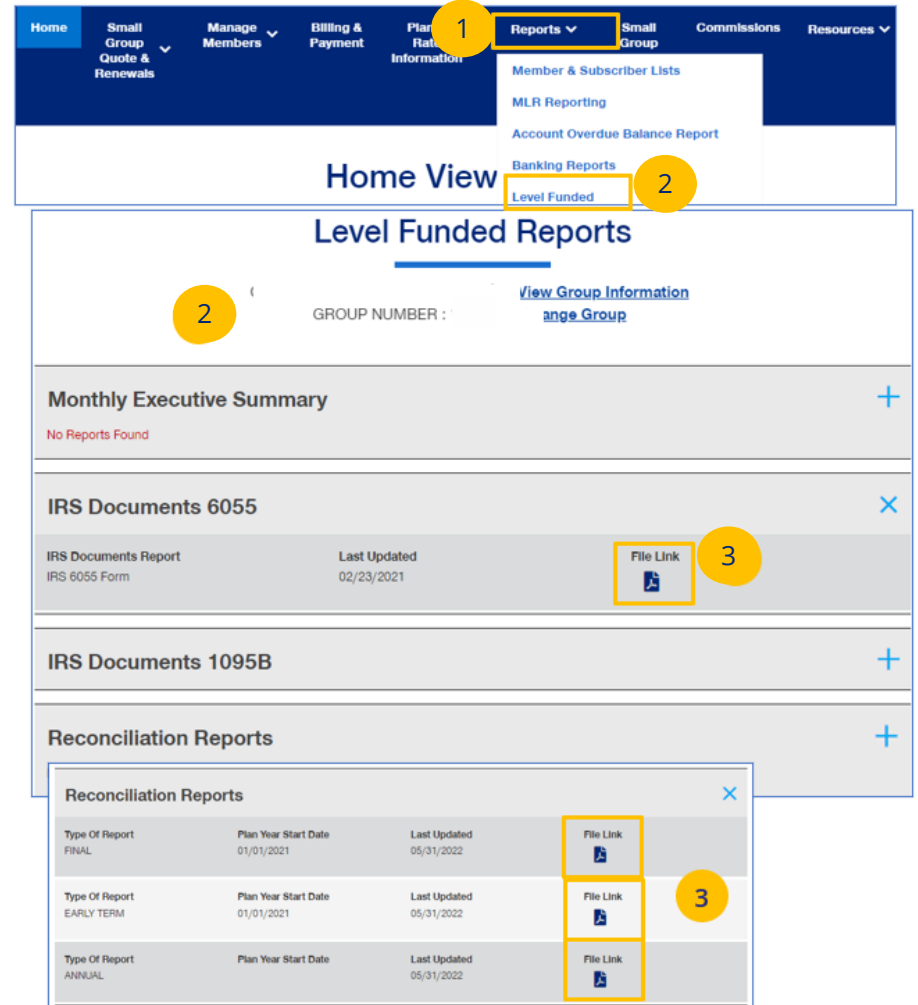
NOTE: This report is not available for **UnitedHealthcare HMO** users.

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.



Home View

Level Funded Reports

GROUP NUMBER :

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

Monthly Executive Summary +

No Reports Found

IRS Documents 6055 ×

Type Of Report	Plan Year Start Date	Last Updated	File Link
IRS Documents Report			
IRS 6055 Form		02/23/2021	

IRS Documents 1095B +

Reconciliation Reports +

Reconciliation Reports ×

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

Shared Savings Reports

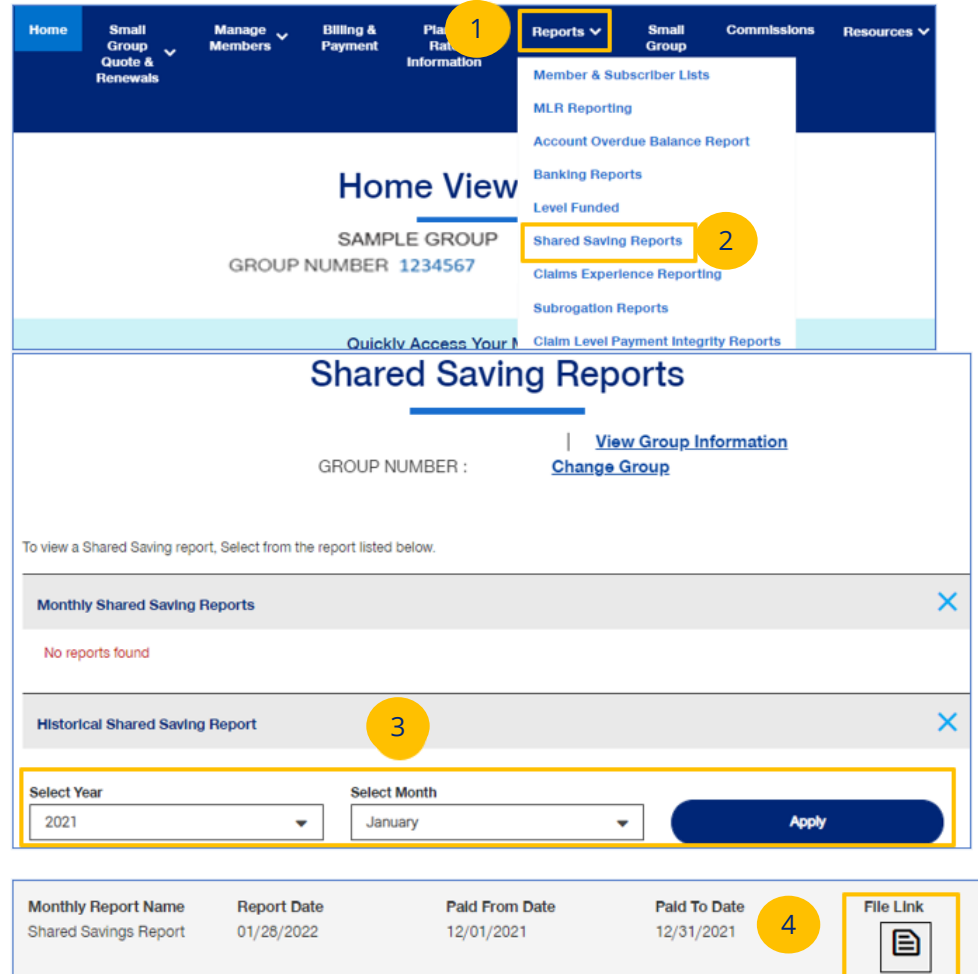
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The **Shared Saving Reports** are in Excel and show claims (summary and detail) for a specific month and year. Historical reports are also available.

NOTE:

- This report is not available for **UnitedHealthcare HMO** users.
- This report is for ASO groups only.

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



Home View
SAMPLE GROUP
GROUP NUMBER 1234567

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

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

Monthly Shared Saving Reports ✕

No reports found

Historical Shared Saving Report ✕

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

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

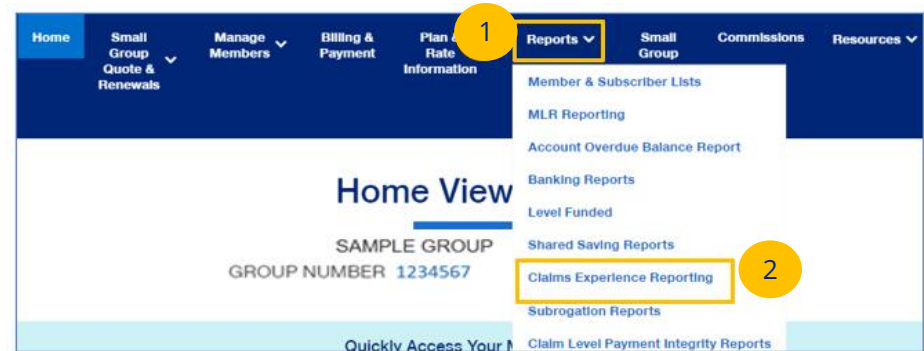
Claims Experience Reporting

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

NOTE: This report is not available for **UnitedHealthcare HMO or Surest** users at this time.

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



Subrogation Reports

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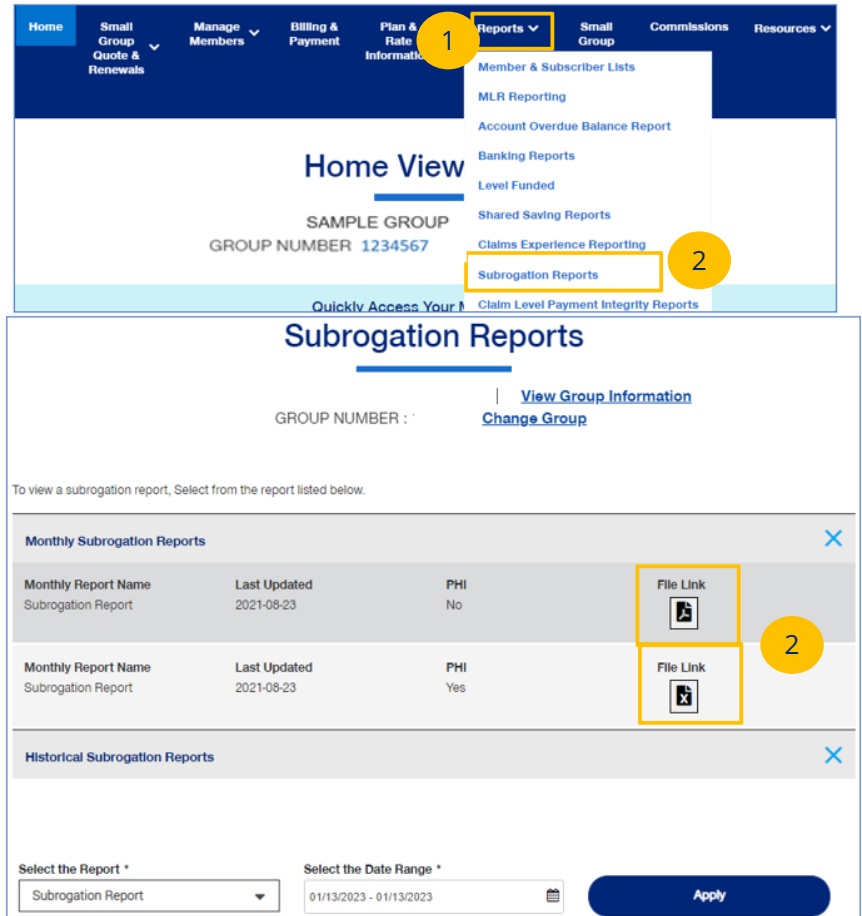
The **Subrogation Reports** show information for a specific month and year. Historical reports are also available.

NOTE:

- This report is not available for **UnitedHealthcare HMO** users.
- This report is for ASO groups only.

- Click the **Reports** tab.
- 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**.



Subrogation Reports

GROUP NUMBER : 1234567

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

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

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

Historical Subrogation Reports

Select the Report *
Subrogation Report

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

Apply

Claim Level Payment Integrity Reports

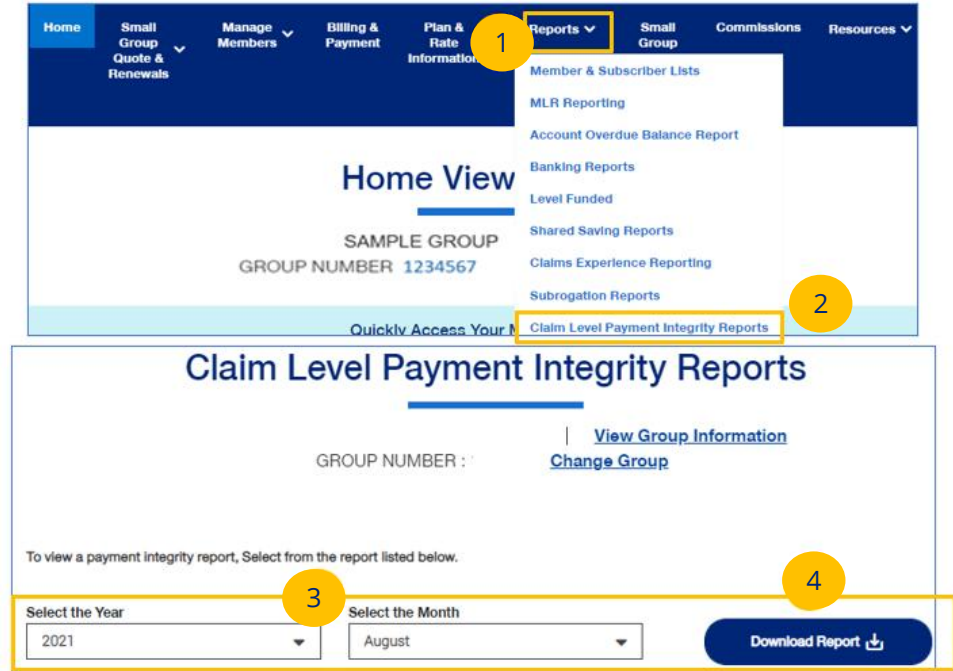
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The **Claim Level Payment Integrity Reports** are in Excel and detailed information on claims per member.

NOTE:

- This report is not available for **UnitedHealthcare HMO** users.
- 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.



The screenshot shows the UnitedHealthcare E&I Sales Readiness portal. The top navigation bar includes links for Home, Small Group Quote & Renewals, Manage Members, Billing & Payment, Plan & Rate Information, Reports (highlighted with a yellow circle and number 1), Small Group, Commissions, and Resources. The Reports dropdown menu is open, showing various report options, with 'Claim Level Payment Integrity Reports' highlighted (yellow circle and number 2). Below the menu, the 'Home View' section displays 'SAMPLE GROUP' and 'GROUP NUMBER 1234567'. The 'Claim Level Payment Integrity Reports' section shows a 'GROUP NUMBER' field and links for 'View Group Information' and 'Change Group'. A message states: 'To view a payment integrity report, Select from the report listed below.' Below this, there are two dropdown menus: 'Select the Year' (set to 2021, yellow circle and number 3) and 'Select the Month' (set to August, yellow circle and number 4). A 'Download Report' button with a download icon is located to the right of the month dropdown.

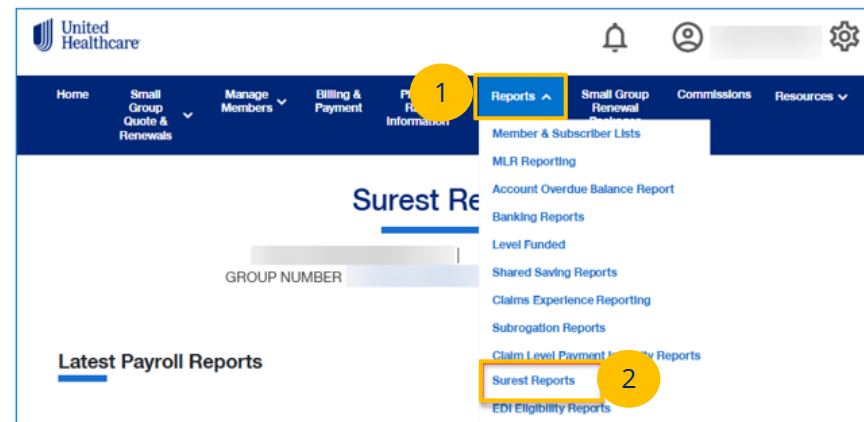
Surest Reports

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

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

1. Click the **Reports** tab.
2. Select **Surest Reports**. The **Surest 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.



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

Latest Payroll Reports

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

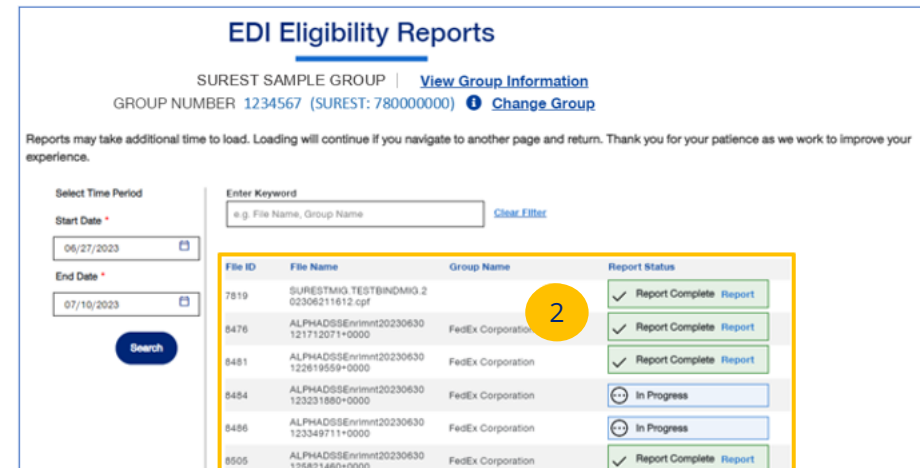
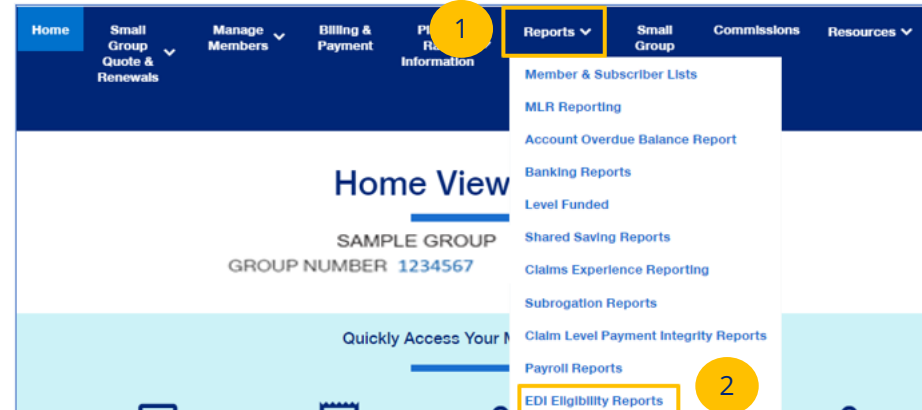
Employer Name:	Surestmarsh09	Employer GI:	78700089	Schedule:	HCL Semi-Mon Frequency:	SEMI_MONTHLY													
All Payroll Deductions:																			
Report Generated On:	03/01/2023																		
Pay Period Check Date:	02/28/2023																		
Employee Number	Last Name	First Name	Date Of Birth	Last Four SSN	Benefit Name	Per Pay Period Deduction	First Paycheck Deduction	Total Premiums	Total Deductions	Deductions Remaining									
Duck1	Donald	1	11/15/1981	8330	Coverage	75.00	01/31/2023	1,650.00	22	19									
Duck2	Donald	2	12/02/1969	8331	Coverage	50.00	11/25/2022	450.00	9	1									
Duck3	Donald	3	01/29/1962	8332	Coverage	125.00	09/09/2022	3,250.00	26	13									
Duck4	Donald	4	09/19/1983	8333	Coverage	50.00	01/31/2023	450.00	9	6									

EDI Eligibility Reports

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

1. Click the **Reports** tab.
2. Select **EDI Eligibility Reports**. The **EDI Eligibility Reports** window displays with reports that fall within the default time period.
 - Each report shows 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.
 - **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.
 - **Searching by Date or Keyword** – You can search for reports by **Time Period** (Start Date and End Date) or by **Keyword**. **Time Period** searches must be within a 14-day window and are limited to the previous six months. **Keyword** searches will show results as you enter the word.



EDI Eligibility Reports (Continued)

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

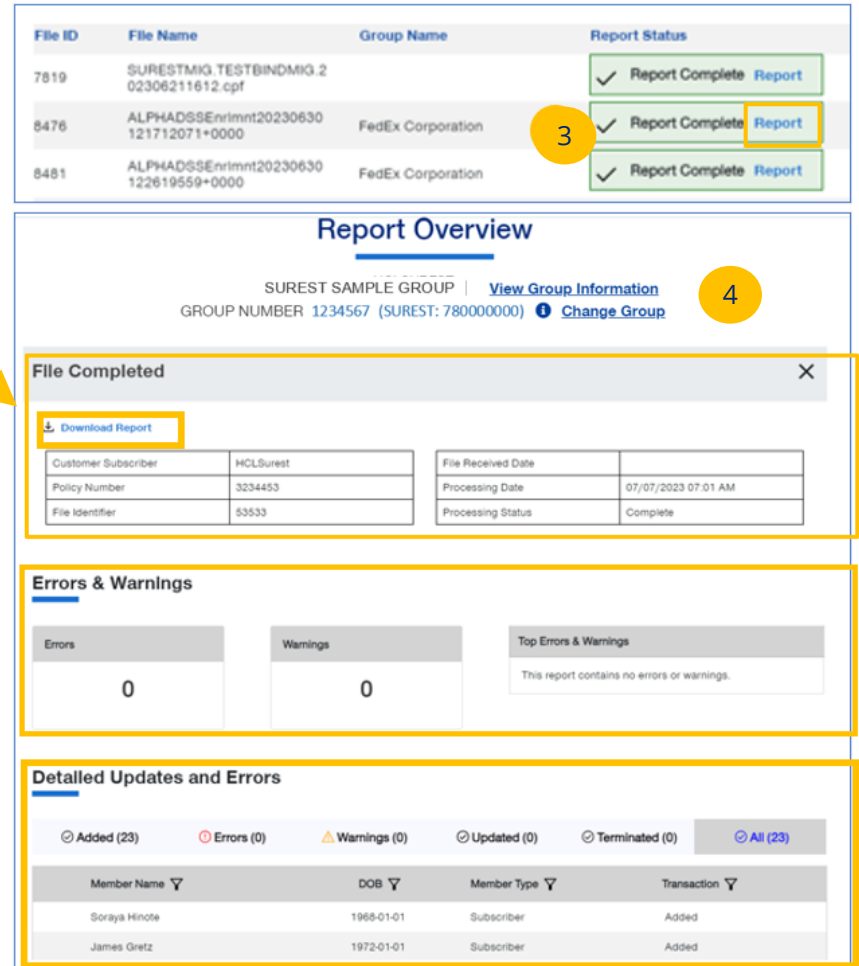
Below is a description of the sections of the report:

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

NOTE: Download Report – Click the Download Report link to download the report in Excel.

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

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



File ID	File Name	Group Name	Report Status
7819	SURESTMIG.TESTBINDMIG.2 02306211612.cpf		✓ Report Complete Report
8476	ALPHADSSEnrmt20230630 121712071+0000	FedEx Corporation	✓ Report Complete Report
8481	ALPHADSSEnrmt20230630 122619559+0000	FedEx Corporation	✓ Report Complete Report

Report Overview

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

File Completed

[Download Report](#)

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

Errors & Warnings

Errors	Warnings	Top Errors & Warnings
0	0	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

UHC Rewards Reports

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

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

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



UHC Rewards Reports

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

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

Plan & Rate Information

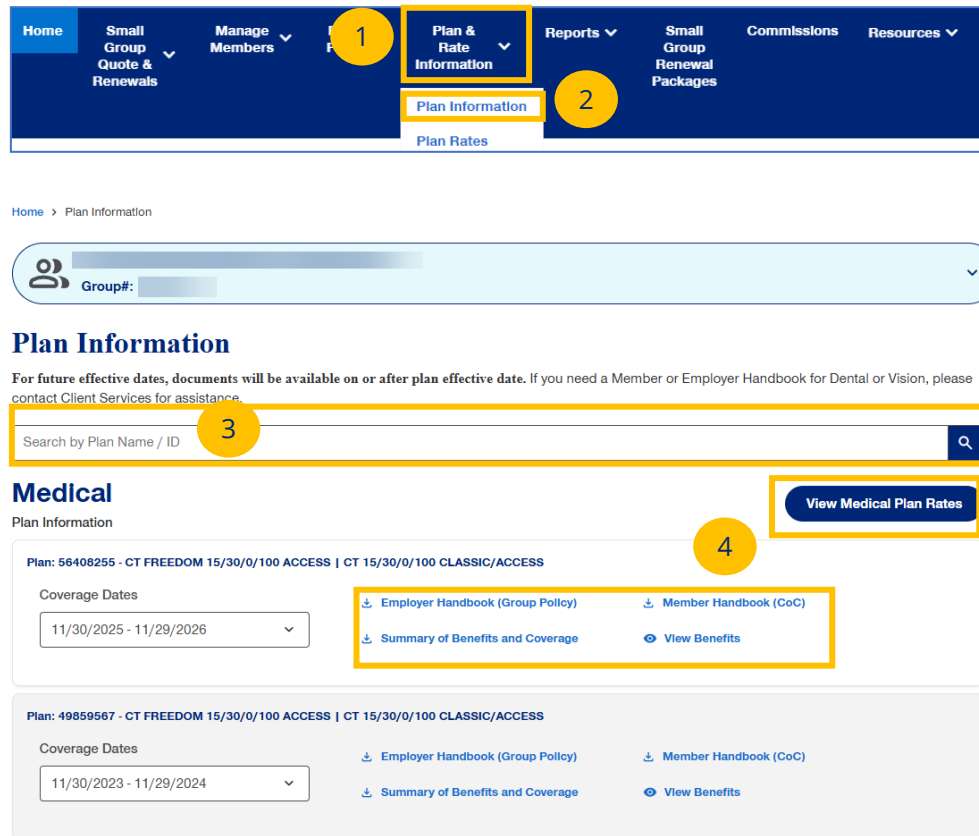
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To View Plan Information:

1. Click **Plan & Rate Information** tab.
2. Click **Plan Information**. The **Plan Information** screen will be shown.
3. Filter the report to show only specific plans, if needed.
4. Click on the links to view or download the documents:
 - View Medical Plan 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.
- Documents available for **UnitedHealthcare HMO** users are **Summary of Benefit Coverage (SBC)** and **Schedule of Benefits**.
- You can also view medical, dental or vision rates (if available) from this screen by clicking the link or links.



The screenshot shows the UnitedHealthcare Plan & Rate Information interface. The top navigation bar includes tabs for Home, Small Group Quote & Renewals, Manage Members, Plan & Rate Information (highlighted with a yellow box and callout 1), Reports, Small Group Renewal Packages, Commissions, and Resources. Below the navigation bar, the Plan & Rate Information section is active, showing a search bar (callout 3) and a list of plans. The first plan is highlighted with a yellow box and callout 4, showing details for Plan 56408255 - CT FREEDOM 15/30/0/100 ACCESS | CT 15/30/0/100 CLASSIC/ACCESS. The plan details include Coverage Dates (11/30/2025 - 11/29/2026) and links to download documents: Employer Handbook (Group Policy), Member Handbook (CoC), Summary of Benefits and Coverage, and View Benefits. A button labeled View Medical Plan Rates is also visible.

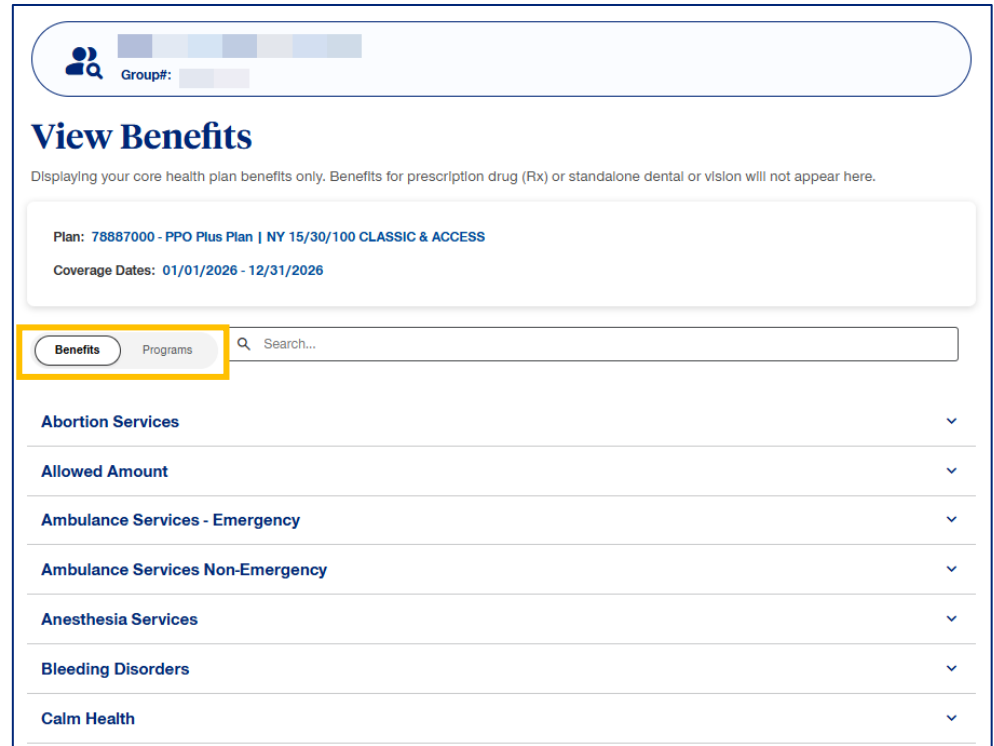
View Benefits

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

- Select the **Benefits** button to view the detailed plan benefits. The benefits are listed in alphabetical order. Click on a specific letter to go to benefits that begin with that letter.
- Select the **Programs** button to view all the programs associated with the plan (includes embedded and buy-up programs).

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



View Benefits

Displaying your core health plan benefits only. Benefits for prescription drug (Rx) or standalone dental or vision will not appear here.

Plan: 78887000 - PPO Plus Plan | NY 15/30/100 CLASSIC & ACCESS

Coverage Dates: 01/01/2026 - 12/31/2026

Benefits Programs Search...

- Abortion Services
- Allowed Amount
- Ambulance Services - Emergency
- Ambulance Services Non-Emergency
- Anesthesia Services
- Bleeding Disorders
- Calm Health

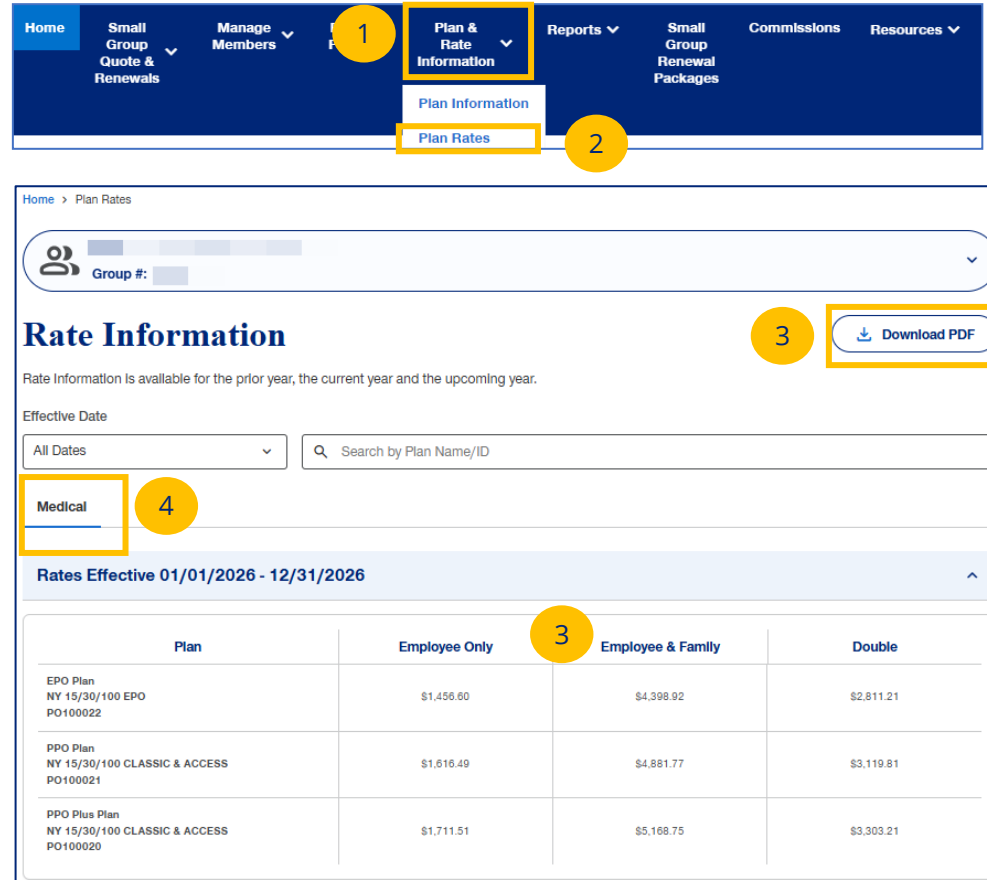
Plan & Rate Information

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To view rates for purchased products.

1. Click the **Plan & Rate Information** tab.
2. Click **Plan Rates**. The **Plan Rates** screen will be shown.
3. View or download the rates to a pdf.
4. You can view rates for purchased products from this screen by clicking the link or links.

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



The screenshot shows the UnitedHealthcare Plan & Rate Information interface. The top navigation bar includes tabs for Home, Small Group Quote & Renewals, Manage Members, Plan & Rate Information (highlighted with a yellow box and callout 1), Reports, Small Group Renewal Packages, Commissions, and Resources. Below the navigation bar, the Plan & Rate Information dropdown menu is open, showing Plan Information and Plan Rates (highlighted with a yellow box and callout 2). The main content area displays the Plan Rates screen. At the top, there is a search bar with a user icon and a Group # field. Below this is the Rate Information section, which includes a Download PDF button (highlighted with a yellow box and callout 3). The Effective Date is set to All Dates, and there is a search bar for Plan Name/ID. The Medical tab is selected (highlighted with a yellow box and callout 4). The Rates Effective 01/01/2026 - 12/31/2026 section shows a table of rates for three plans: EPO Plan, PPO Plan, and PPO Plus Plan. The table has four columns: Plan, Employee Only, Employee & Family (highlighted with a yellow box and callout 3), and Double.

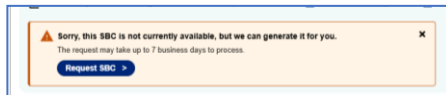
Plan	Employee Only	Employee & Family	Double
EPO Plan NY 15/30/100 EPO PO100022	\$1,456.60	\$4,398.92	\$2,811.21
PPO Plan NY 15/30/100 CLASSIC & ACCESS PO100021	\$1,616.49	\$4,881.77	\$3,119.81
PPO Plus Plan NY 15/30/100 CLASSIC & ACCESS PO100020	\$1,711.51	\$5,168.75	\$3,303.21

Pre-Sale Benefit Summaries & SBCs

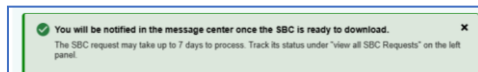
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The **Pre-Sale Benefit Summaries & SBCs** option allows you to search for and download benefit summaries or the SBC (Summary of Benefit Coverage) by funding type and state.

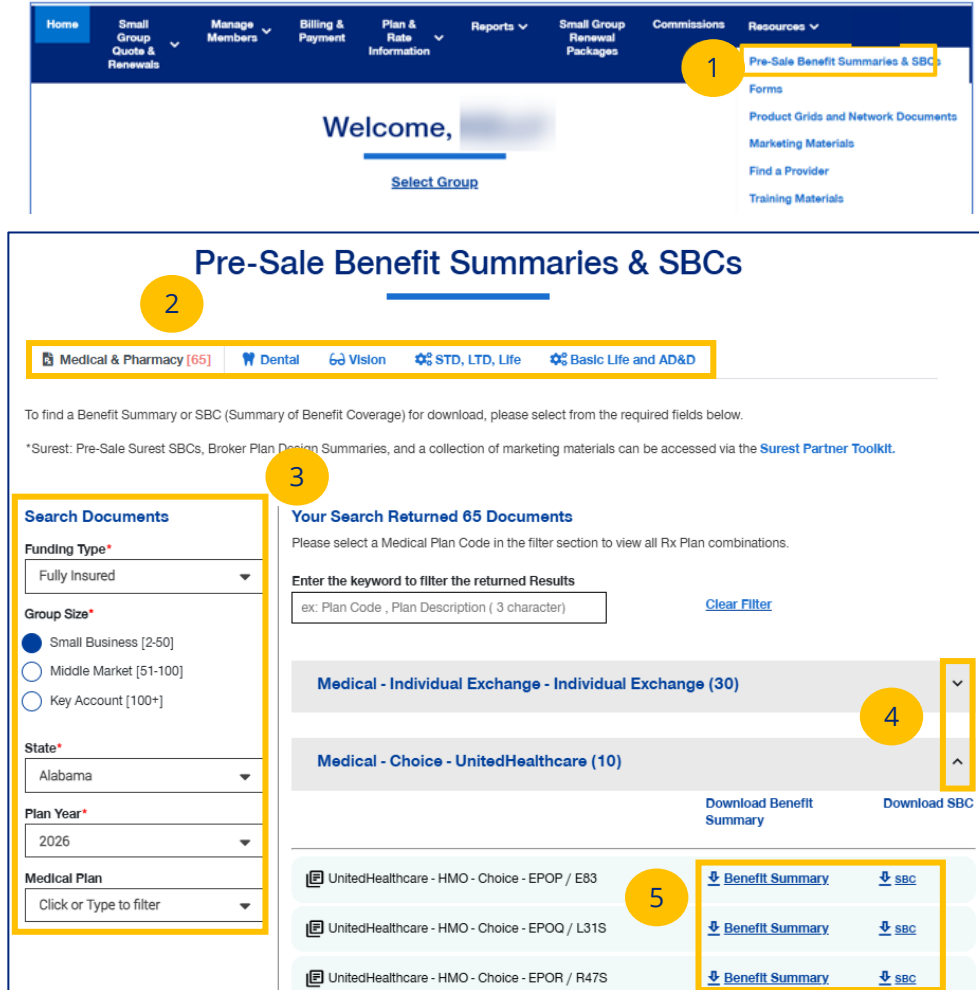
1. From the Resources tab, click the **Pre-Sale Benefit Summaries & SBCs** link.
2. Select **Medical & Pharmacy, Dental, Vision, STD, LTD, Life** or **Basic Life & AD&D**. Medical & Pharmacy is the default.
3. In **Search Documents**, use the drop downs to select funding type, state and year. Results appear as selections are made.
4. If multiple documents are returned, click the down arrow to expand the list.
5. Click the link to download the document you need.
6. Click **Request SBC** to request a copy. Completed requests appear in the Message Center.



7. Notification messages appear for successful and duplicate requests.



8. View the status of previous SBC requests by clicking **View All SBC Requests**.

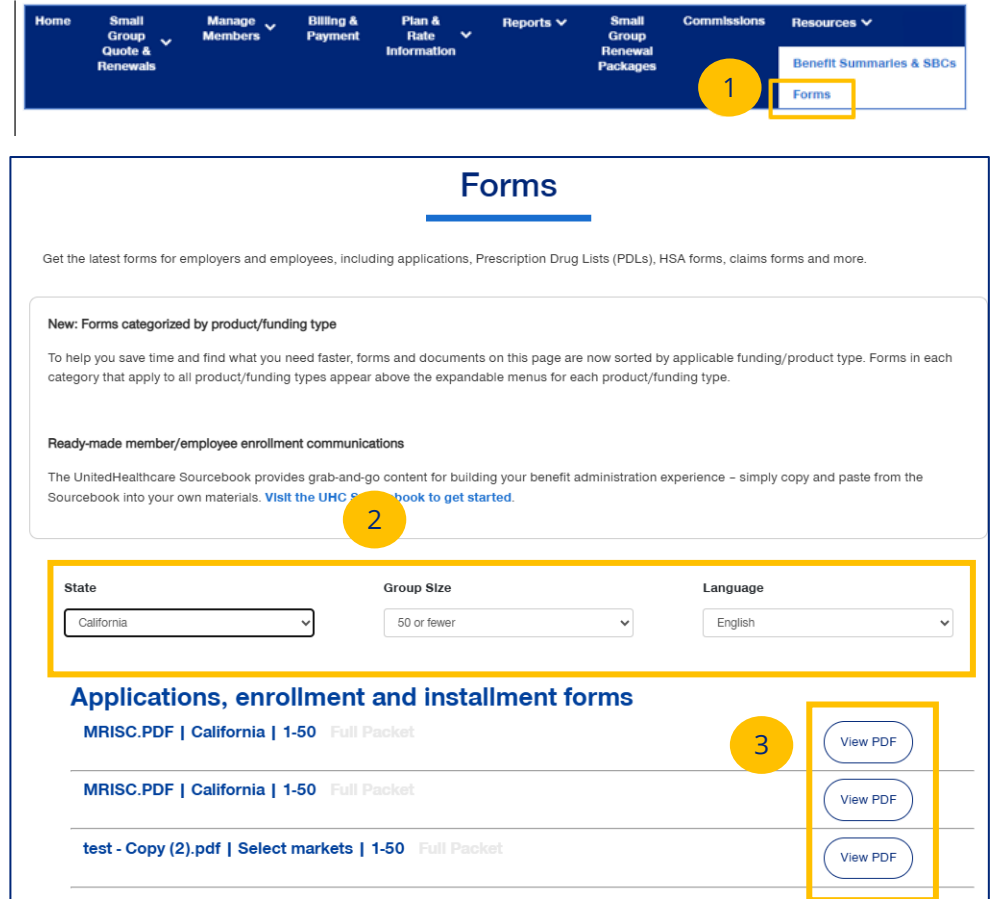


Forms

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

1. From the **Resources** tab, click the **Forms** link.
2. Select a state to access forms for that state. In addition to State, you can also select a Group Size.
3. When you access the forms for the state, you can click the **View PDF** button to display the form.



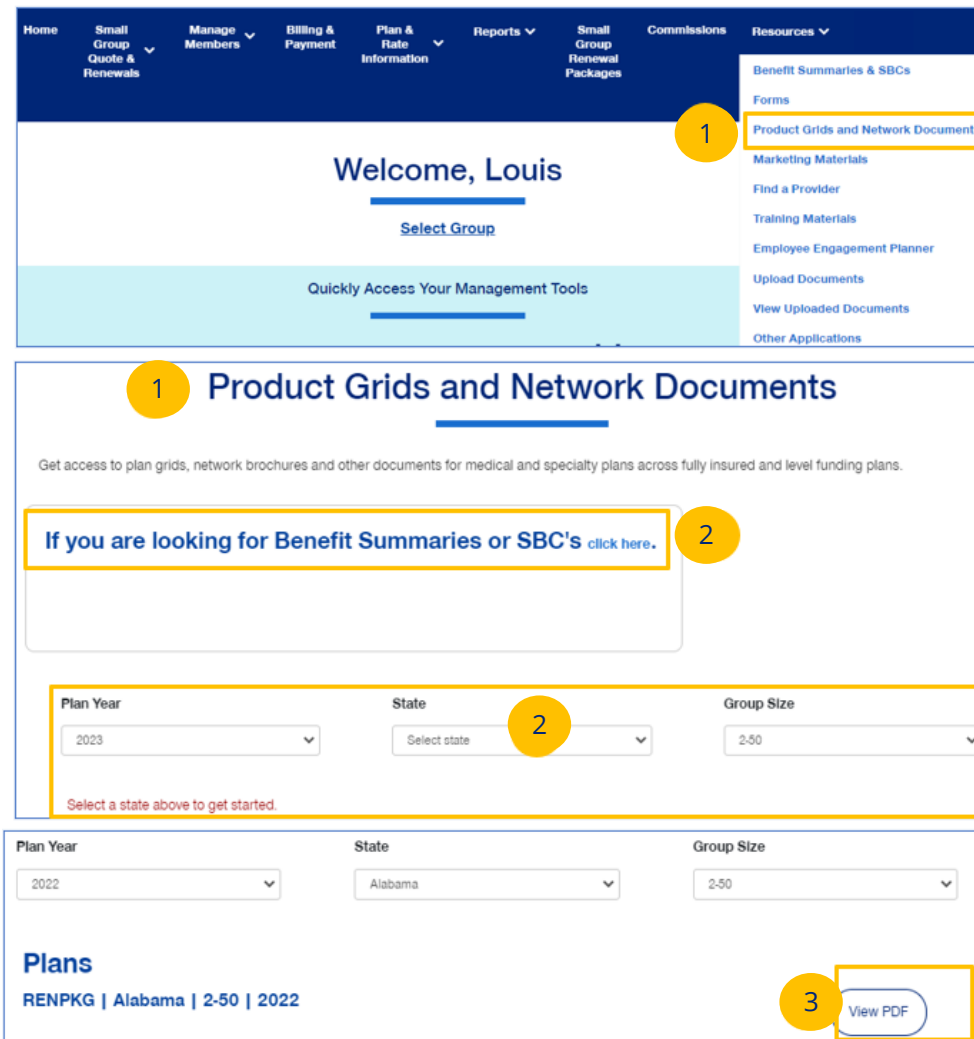
The screenshot shows the UnitedHealthcare Forms page. At the top, a navigation bar contains several tabs: Home, Small Group Quote & Renewals, Manage Members, Billing & Payment, Plan & Rate Information, Reports, Small Group Renewal Packages, Commissions, and Resources. A yellow circle with the number '1' highlights the 'Forms' link under the 'Resources' tab. Below the navigation bar, the page title 'Forms' is centered. A paragraph states: 'Get the latest forms for employers and employees, including applications, Prescription Drug Lists (PDLs), HSA forms, claims forms and more.' A section titled 'New: Forms categorized by product/funding type' explains that forms are now sorted by applicable funding/product type. Another section titled 'Ready-made member/employee enrollment communications' mentions the UnitedHealthcare Sourcebook. Below these sections, a filter area is highlighted with a yellow box and a yellow circle with the number '2'. This area contains three dropdown menus: 'State' (set to California), 'Group Size' (set to 50 or fewer), and 'Language' (set to English). Below the filter area, the section 'Applications, enrollment and installment forms' is displayed. It lists three items: 'MRISC.PDF | California | 1-50 Full Packet', 'MRISC.PDF | California | 1-50 Full Packet', and 'test - Copy (2).pdf | Select markets | 1-50 Full Packet'. A yellow box with a yellow circle containing the number '3' highlights the 'View PDF' buttons for each of these items.

Products Grids and Network Documents

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

1. From the **Resources** tab, click the **Product Grids and Network Documents** link. The **Product Grids and Network Documents** screen displays.
2. You can (1) click the **Benefit Summaries or SBC's** link to generate benefit summaries or SBCs, or (2) select a state to access forms for that state. In addition to **State**, you can also select a **Plan Year** and **Group Size**.
3. When you access the documents for the state, you can click the **View PDF** button to display the form.



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

Below the navigation bar, a light blue banner reads "Welcome, Louis" with a "Select Group" link. Below this is a section titled "Quickly Access Your Management Tools".

The main content area is titled "Product Grids and Network Documents" (callout 1). Below the title, a message states: "Get access to plan grids, network brochures and other documents for medical and specialty plans across fully insured and level funding plans."

A yellow box highlights a link: "If you are looking for Benefit Summaries or SBC's click here." (callout 2).

Below this is a form with three dropdown menus: Plan Year (set to 2023), State (set to "Select state" with callout 2), and Group Size (set to 2-50). A red message below the form says: "Select a state above to get started."

Below the form, the selected filters are displayed: Plan Year: 2022, State: Alabama, Group Size: 2-50. The title "Plans" is followed by the text "RENPKG | Alabama | 2-50 | 2022". A yellow box highlights a "View PDF" button (callout 3).

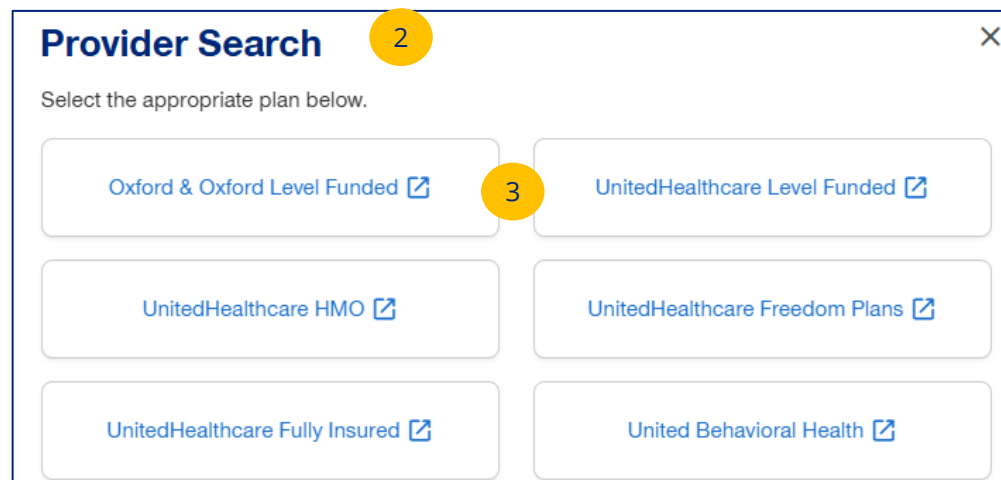
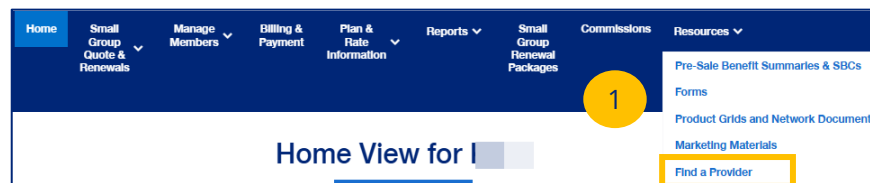
Provider Search

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

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

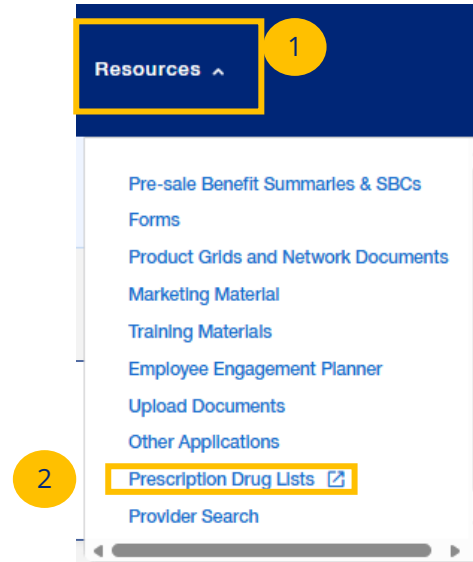
1. From the **Resources** tab, click **Find a Provider**.
2. The **Provider Search** screen displays.
3. Select a plan and follow the associated prompts. The steps and screens vary based on which plan was selected. You may be prompted to search/select:
 - Plan type
 - State or zip code
 - Provider name
 - Provider type
 - Condition
 - Procedures



Prescription Drug Lists

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1. Click **Resources**.
2. Click **Prescription Drug Lists**.
3. Click the specific link to the display the drug list you need.



Pharmacy benefits

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

Prescription Drug Lists

3 Check your PDL to stay updated on your pharmacy coverage

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

Health Insurance Marketplace and Small and Large Group plans

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

Individual and SHOP Marketplace Drug Lists (On-Exchange)

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

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

- Prescription Drug Lists
- Medical Drug Lists

Sign In to view the PDL for your plan

Select your plan to sign in ▼

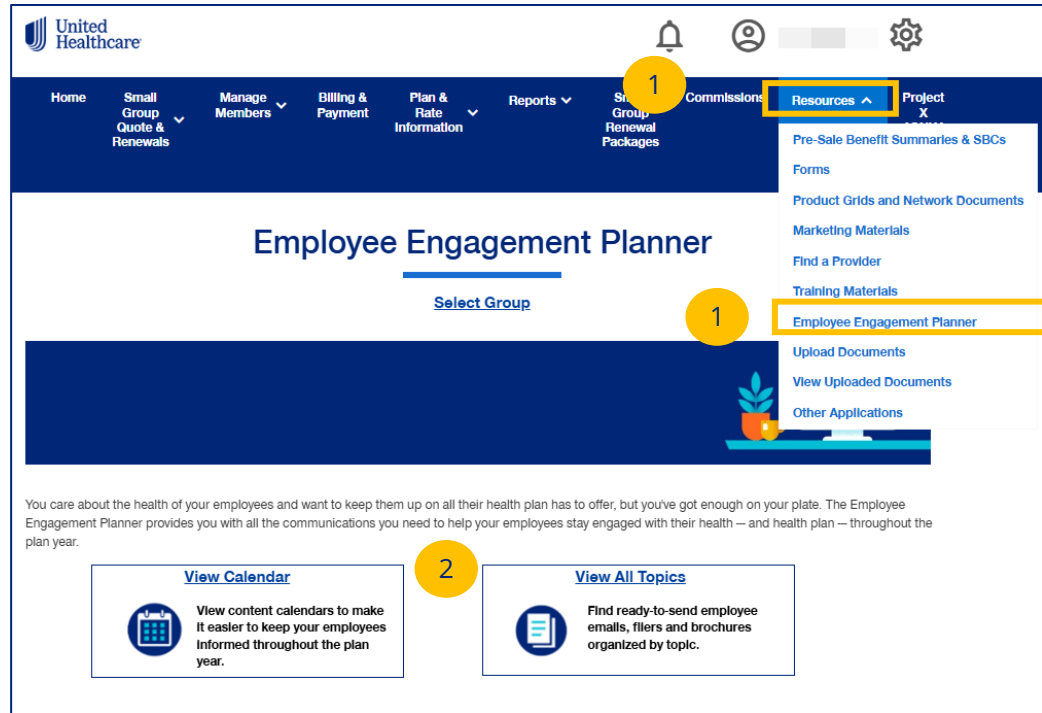
Employee Engagement Planner

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

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

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



UnitedHealthcare

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

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

Employee Engagement Planner

Select Group

You care about the health of your employees and want to keep them up on all their health plan has to offer, but you've got enough on your plate. The Employee Engagement Planner provides you with all the communications you need to help your employees stay engaged with their health — and health plan — throughout the plan year.

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

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

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[Employee Engagement Planner](#)

Calendar

Select 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.

JAN01'26-UHCX

<

>

today

July 2026

month

week

day

Add New Calendar

Select Brand

☐ UnitedHealthcare
 ☐ Oxford

Select Effective Date

Please Select

When selecting multiple filter options, select Apply.

Apply

Reset

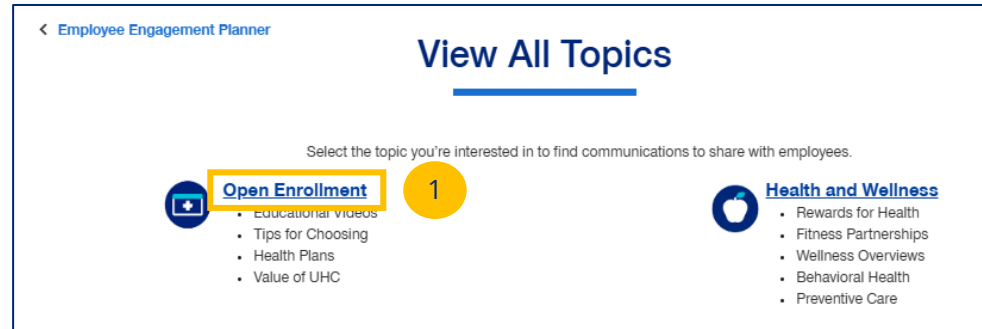
Sun	Mon	Tue	Wed	Thu	Fri	Sat
28	29	30	1	2	3	4
5	6	7	8	9	10	11
					UHC Real Appeal	
					UHC Real Appeal (Level Funded)	
12	13	14	15	16	17	18
UHC Real Appeal						
UHC Real Appeal (Level Funded)						
19	20	21	22	23	24	25
26	27	28	29	30	31	1
2	3	4	5	6	7	8

Employee Engagement Planner – View All Topics

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

1. Click on a topic.
2. Filters appear that allow you to download topics in different formats (brochure, email, flier) when available.



< Employee Engagement Planner

View All Topics

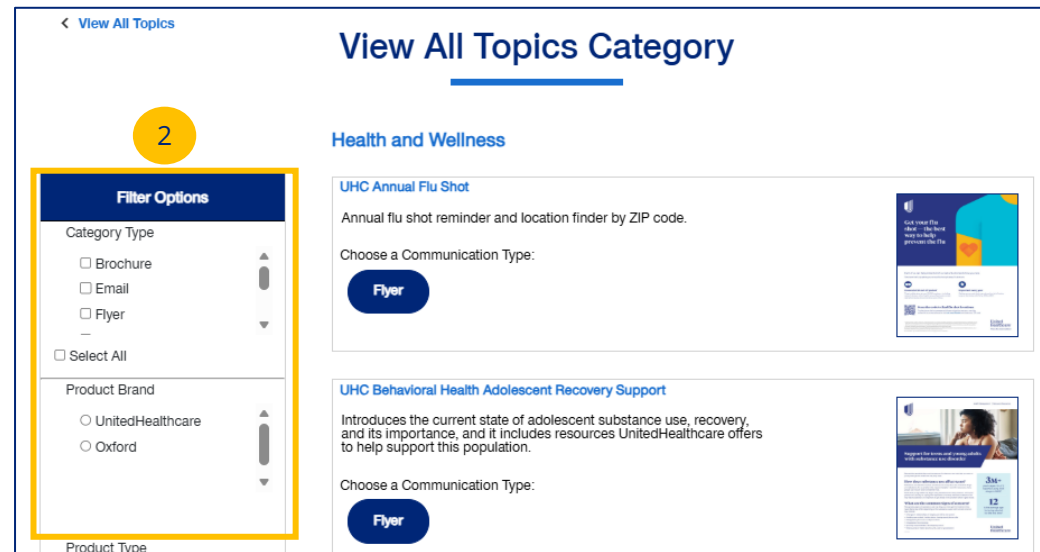
Select the topic you're interested in to find communications to share with employees.

Open Enrollment

- Educational Videos
- Tips for Choosing
- Health Plans
- Value of UHC

Health and Wellness

- Rewards for Health
- Fitness Partnerships
- Wellness Overviews
- Behavioral Health
- Preventive Care



< View All Topics

View All Topics Category

Filter Options

Category Type

☐ Brochure

☐ Email

☐ Flyer

☐ Select All

Product Brand

☐ UnitedHealthcare

☐ Oxford

Health and Wellness

UHC Annual Flu Shot

Annual flu shot reminder and location finder by ZIP code.

Choose a Communication Type:

Flyer

UHC Behavioral Health Adolescent Recovery Support

Introduces the current state of adolescent substance use, recovery, and its importance, and it includes resources UnitedHealthcare offers to help support this population.

Choose a Communication Type:

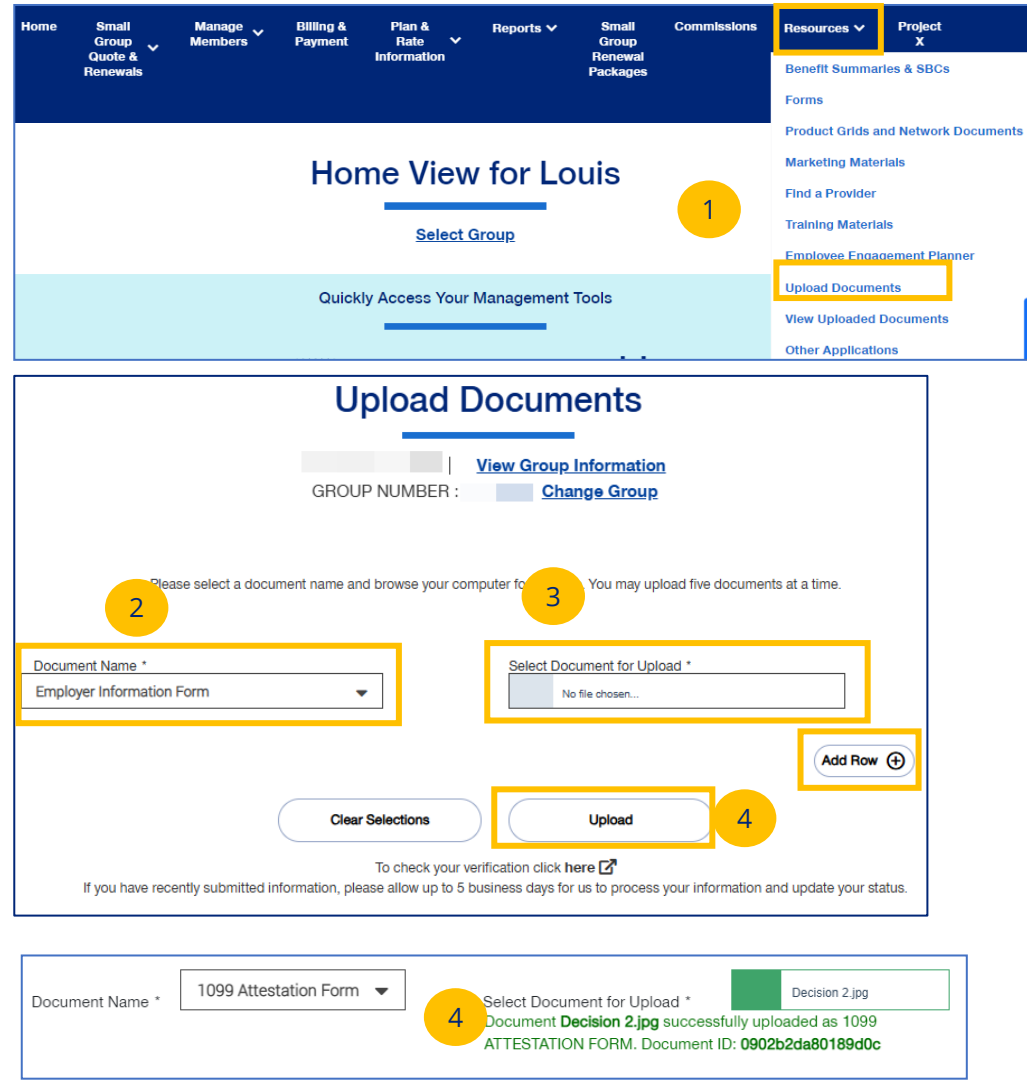
Flyer

Upload Documents

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

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



The screenshot shows the UnitedHealthcare web application interface. At the top, a navigation bar includes tabs like Home, Small Group Quote & Renewals, Manage Members, Billing & Payment, Plan & Rate Information, Reports, Small Group Renewal Packages, Commissions, Resources, and Project. The **Resources** tab is selected, and a 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 callout 1), View Uploaded Documents, and Other Applications.

Below the navigation bar, the main content area is titled "Home View for Louis" and includes a "Select Group" link. A light blue banner reads "Quickly Access Your Management Tools".

The "Upload Documents" section is highlighted with a yellow box. It contains a header "Upload Documents" and a "View Group Information" link. Below this, a "GROUP NUMBER" field is shown with a "Change Group" link. A message states: "Please select a document name and browse your computer for [] You may upload five documents at a time." (Callout 3 points to the file selection area).

There are two main input areas:

- Document Name ***: A dropdown menu currently showing "Employer Information Form" (Callout 2 points to this dropdown).
- Select Document for Upload ***: A file selection box showing "No file chosen..." (Callout 3 points to this box).

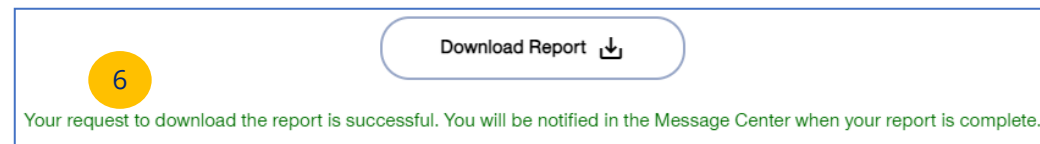
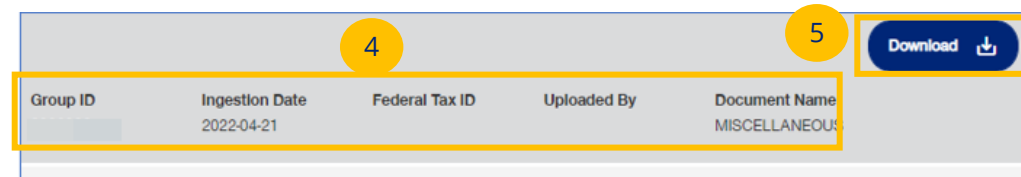
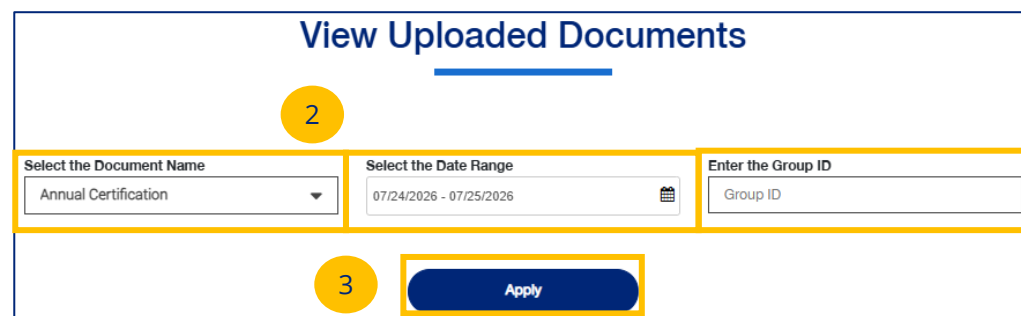
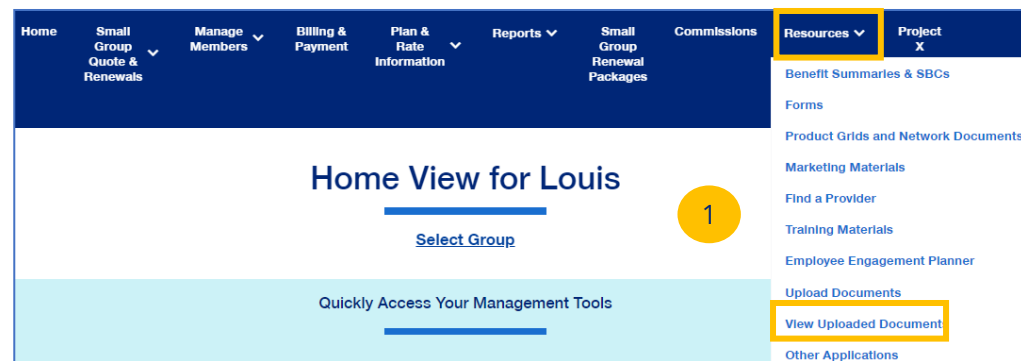
Below these inputs are three buttons: "Clear Selections", "Upload" (Callout 4 points to this button), and "Add Row" (with a plus icon). A note at the bottom states: "To check your verification click here [link]. If you have recently submitted information, please allow up to 5 business days for us to process your information and update your status."

A second example of the upload process is shown below, with a yellow box highlighting the "Document Name" dropdown (set to "1099 Attestation Form") and the "Select Document for Upload" box (showing a green thumbnail for "Decision 2.jpg"). A callout 4 points to the "Upload" button. A confirmation message below reads: "Document **Decision 2.jpg** successfully uploaded as 1099 ATTESTATION FORM. Document ID: 0902b2da80189d0c".

View Uploaded Documents

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1. Click View **Upload Documents** from the **Resources** tab. The **View Uploaded Documents** screen displays.
2. Click the drop-down arrow to **Select Document Name, Date Range and Group ID**.
NOTE: You cannot select more than 60 days in the past from current date.
3. Click **Apply**.
4. The report or reports that meet your criteria will be shown at the bottom of the screen, including the name of who uploaded the documents.
5. Click **Download** to download a PDF of the report.
6. A message displays telling you the download was successful.

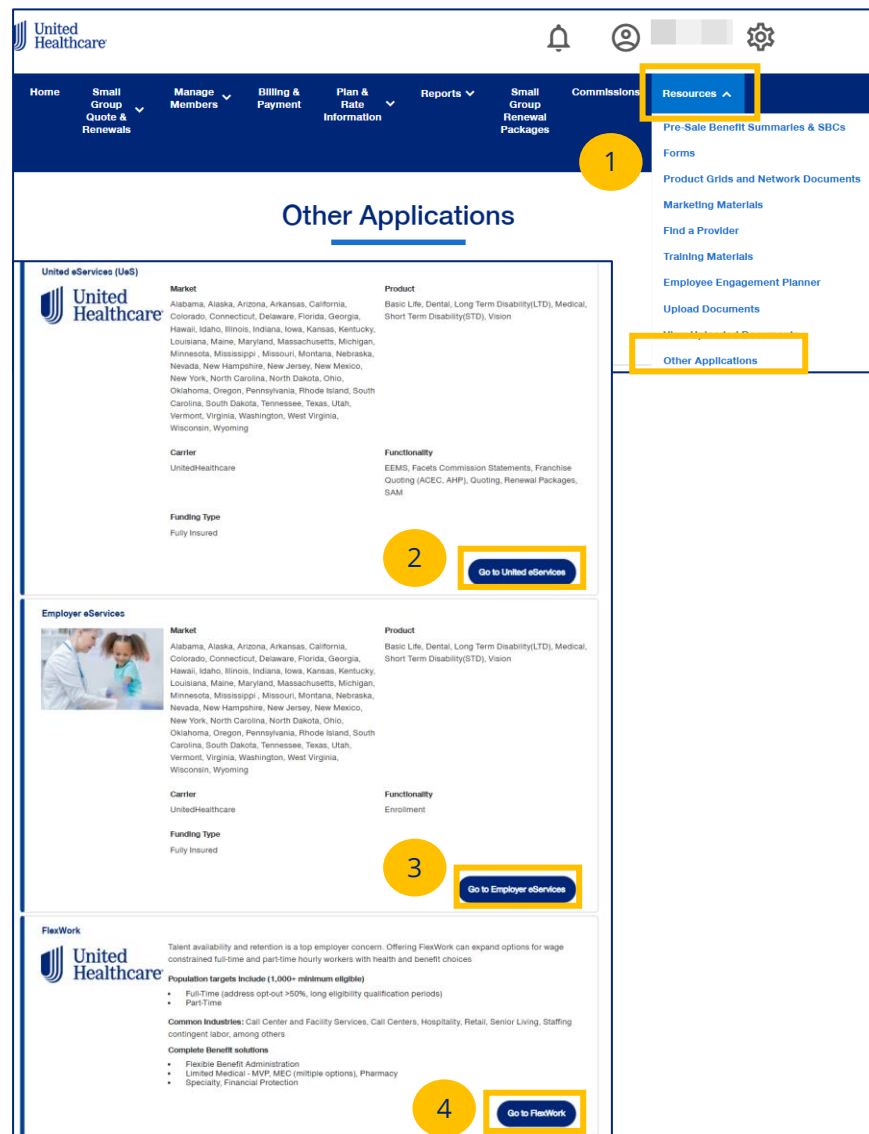


Other Applications

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

1. Click the **Resources** tab, then **Other Applications**.
2. Click **Go to United eServices**.
 - **United eServices** is the original broker website for UHC. Most functionality has moved to UHCeServices.
3. Click **Go to Employer eServices**.
 - **Employer eServices** is a UHC site for employers and brokers with policies on our UNET platform.
4. Click **Go to FlexWork**.
 - FlexWork is a UHC site for employers who offer insurance to part-time employees. Users must be registered with the FlexWork site and have SSO (single sign-on).



The screenshot shows the UnitedHealthcare UeS portal. The top navigation bar includes links like Home, Small Group Quote & Renewals, Manage Members, Billing & Payment, Plan & Rate Information, Reports, Small Group Renewal Packages, and Commissions. A red box highlights the 'Resources' link in the top right, with a callout '1'. Below the navigation bar, the 'Other Applications' section is displayed. It contains three main cards: 'United eServices (UeS)', 'Employer eServices', and 'FlexWork'. Each card has a 'Go to' button. Callout '2' points to the 'Go to United eServices' button. Callout '3' points to the 'Go to Employer eServices' button. Callout '4' points to the 'Go to FlexWork' button. A red box also highlights the 'Other Applications' link in the right-hand sidebar.

Commissions

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

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

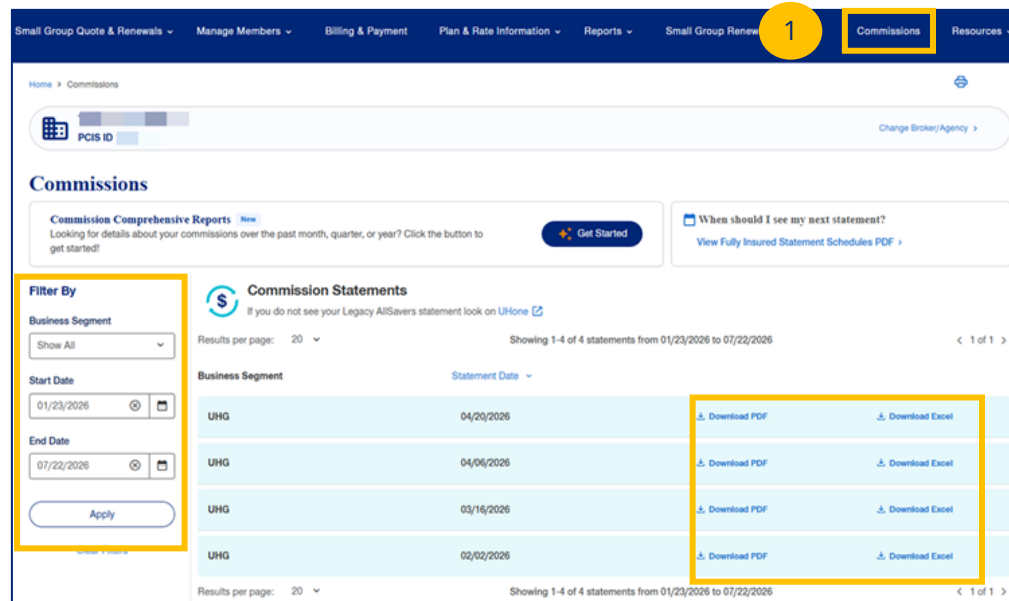
NOTE: For Internal Sales roles, you will have to enter the Broker's PCIS ID to access the **Commissions** screen.

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



The screenshot shows the UnitedHealthcare Commissions interface. At the top, the 'Commissions' tab is selected in the navigation bar. Below the navigation bar, there's a search bar for 'PCIS ID' and a 'Change Broker/Agency' link. The main content area is titled 'Commissions' and includes a 'Commission Comprehensive Reports' section with a 'Get Started' button. Below this, there's a 'When should I see my next statement?' section with a link to 'View Fully Insured Statement Schedules PDF'. The main table is titled 'Commission Statements' and shows a list of statements. The table has columns for 'Business Segment' and 'Statement Date'. Four rows of statements are displayed, each with 'Download PDF' and 'Download Excel' links. A yellow box highlights the 'Download PDF' and 'Download Excel' links for the first row. Another yellow box highlights the 'Filter By' sidebar on the left, which includes filters for 'Business Segment' (set to 'Show All'), 'Start Date' (01/23/2026), and 'End Date' (07/22/2026), with an 'Apply' button.

Compensation Agent: Comprehensive Reports

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The compensation agent gives brokers an easy way to view all their commission information in one place.

Brokers and groups can quickly see earnings and statements in charts or tables, saving time and reducing manual work.

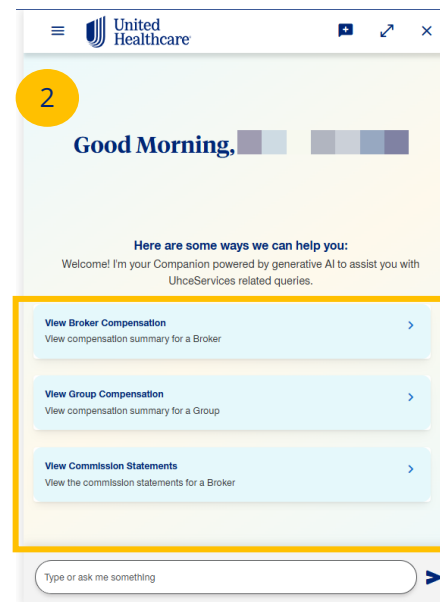
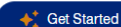
1. From the Commissions page, click the **Get Started** button.
2. The agent appears on the right-hand side of the screen. From here, you can view:
 - Broker Compensation
 - Group Compensation
 - Broker Commission Statements

Commissions

1

Commission Comprehensive Reports New

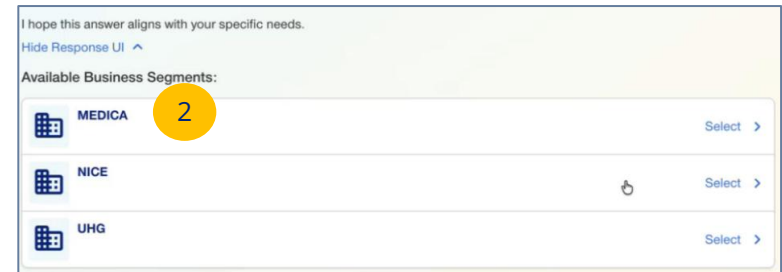
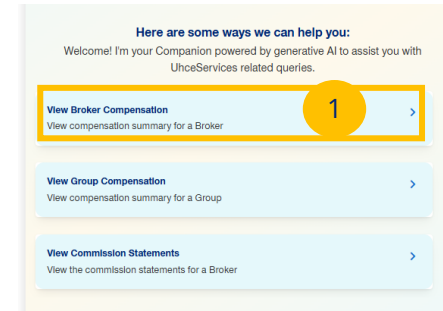
Looking for details about your commissions over the past month, quarter, or year? Click the button to get started!



View Broker Compensation

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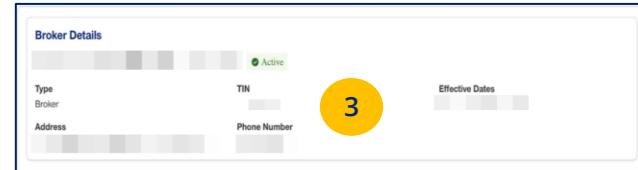
1. Select **View Broker Compensation**.
2. Select appropriate segment if prompted.



View Broker Compensation

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3. Broker details appear in a graph. You can select to view compensation:
 - a) By year, quarter, month or pay period. Date range options adjust accordingly
 - b) By Coverage Type, Market Segment, Compensation Type, Rate Type or Funding Type.
4. Scroll down the page to view commissions data in a table format that can be downloaded.



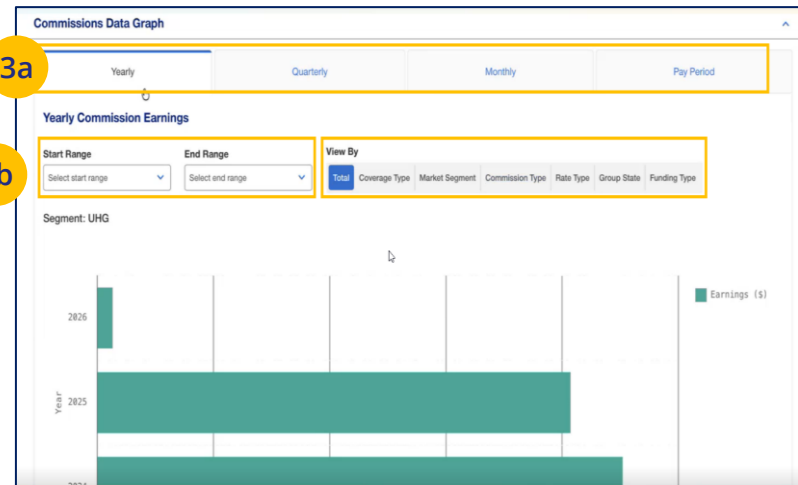
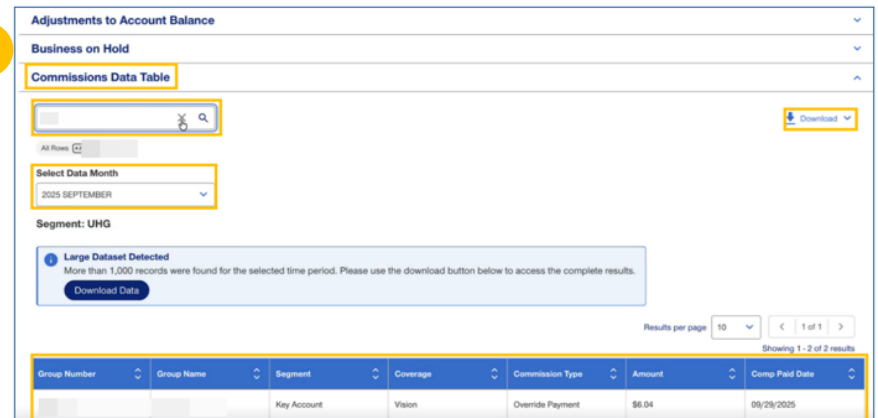
Broker Details

Active

Type: Broker TIN: Effective Dates:

Address: Phone Number:

3

Adjustments to Account Balance

Business on Hold

Commissions Data Table

Download

Select Data Month: 2025 SEPTEMBER

Segment: UHG

Large Dataset Detected
More than 1,000 records were found for the selected time period. Please use the download button below to access the complete results.
Download Data

Results per page: 10 1 of 1

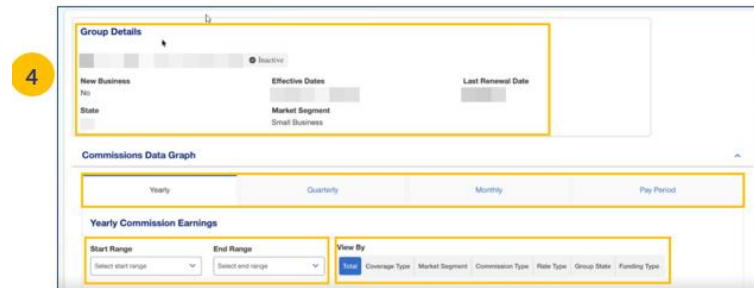
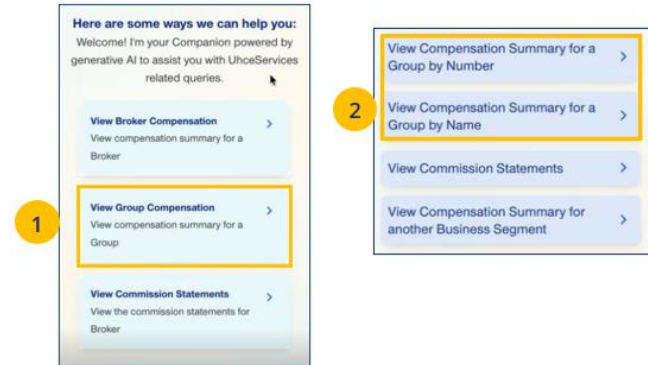
Showing 1-2 of 2 results

Group Number	Group Name	Segment	Coverage	Commission Type	Amount	Comp Paid Date
		Key Account	Vision	Override Payment	\$6.04	09/29/2025

Group Compensation

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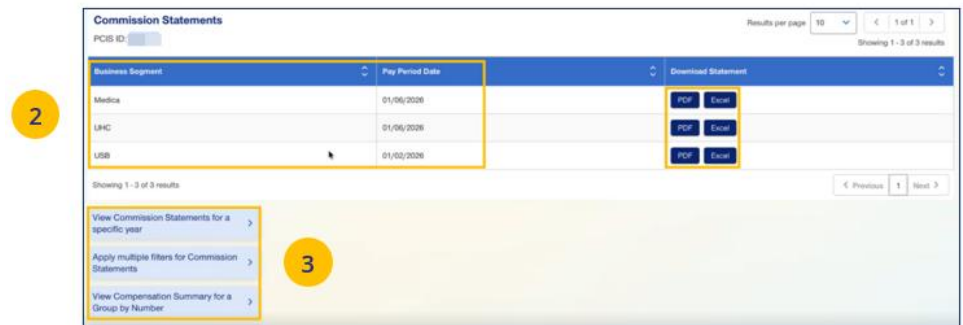
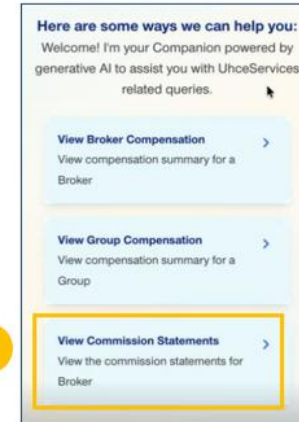
1. To view compensation by group, select **View Group Compensation** from the **Compensation Queries** option or scrolling to the bottom of the **Broker Compensation** page.
2. Then select **View by Group Number** or **Group Name**.
3. Enter the group name or number when prompted.
4. Group details appear in a graph. You can select to view compensation:
 1. By year, quarter, month or pay period. Date range options adjust accordingly
 2. By Coverage Type, Market Segment, Compensation Type, Rate Type or Funding Type.



Commission Statements

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1. To view commission statements, select **View Commission Statements** from the **Compensation Queries** option or scrolling to the bottom of the **Broker Compensation** page.
2. The most recent commission statements are displayed by segment. **Click** PDF or Excel to download.
3. Additional filters appear beneath the table allowing you to filter commission statements for a specific year or group as well as apply other filters.



Appendix A: Broker Roles and Permissions

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Function	Broker Lead with User Maintenance	Standard Broker with Commissions	Standard Broker with Commissions, no SAMx	Standard Broker without Commissions	Standard Broker no Commissions and Notices	Broker View Only	Broker Content 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	Broker CER only
Manage Broker User	Y	N	N	N	N	N	N	N	N	N	N	N	N	N	N
View Broker User	Y	Y	N	N	N	N	N	N	N	N	N	N	N	N	N
Broker Master User Assignment	Y	N	N	N	N	N	N	N	N	N	N	N	N	N	N
Manage Employer User	N	N	N	N	N	N	N	N	N	N	N	N	N	N	N
View Employer User	N	Y	N	N	N	N	N	N	N	N	N	N	N	N	N
Employer Master User Assignment	N	N	N	N	N	N	N	N	N	N	N	N	N	N	N
View Member & Subscriber List	Y	Y	Y	Y	Y	Y	N	N	N	N	N	N	N	N	N
View Eligibility	Y	Y	Y	Y	Y	Y	N	N	N	N	N	N	N	N	N
View Plan Documents	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	N
View Member	Y	Y	Y	Y	Y	Y	N	N	N	N	N	N	N	N	N
Add, Update & Term Member	Y	Y	Y	Y	Y	N	N	N	N	N	N	N	N	N	N
Print or Order a member's ID card	Y	Y	Y	Y	Y	Y	N	N	N	N	N	N	N	N	N
Quote new business (UeS, Project x, All Saver, Quick Quote)	Y	Y	N	Y	Y	Y	N	Y	Y	Y	N	N	N	Y	N
Commissions	Y	Y	Y	N	N	N	N	Y	Y	N	Y	N	Y	N	N
MLR Reporting	Y	Y	Y	Y	Y	Y	N	N	N	N	N	N	N	N	N
Billing	Y	Y	Y	Y	Y	Y	N	N	N	N	N	N	N	N	N
View Member & Employer Handbook	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	N
Renewal	Y	Y	N	Y	Y	Y	N	Y	N	N	Y	Y	N	Y	N
Renewal Package	Y	Y	Y	Y	Y	Y	N	Y	N	N	Y	Y	N	Y	N
Upload Documents	Y	Y	Y	Y	Y	Y	N	N	N	N	N	N	N	N	N
Employer Search & Display	Y	Y	Y	Y	Y	N	N	Y	Y	Y	Y	Y	Y	Y	N
Broker Search & Display	Y	Y	Y	Y	Y	N	Y	Y	Y	Y	Y	Y	Y	Y	N
Banking Reports	Y	Y	Y	Y	Y	Y	N	N	N	N	N	N	N	N	N
Delinquent Employer Accounts	Y	Y	Y	Y	N	Y	N	N	N	N	N	N	N	N	N
Level Funded Reporting	Y	Y	Y	Y	Y	Y	N	N	N	N	N	N	N	N	N
View Benefit Summaries	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	N
Payroll Report (displays under Surest reports)	N	N	N	N	N	N	N	N	N	N	N	N	N	N	N
View EDI Eligibility Reporting	Y	Y	Y	Y	Y	Y	N	N	N	N	N	N	N	N	N
View Shared Savings	Y	Y	Y	Y	Y	Y	N	N	N	N	N	N	N	N	N

Appendix B: Employer Roles and Permissions

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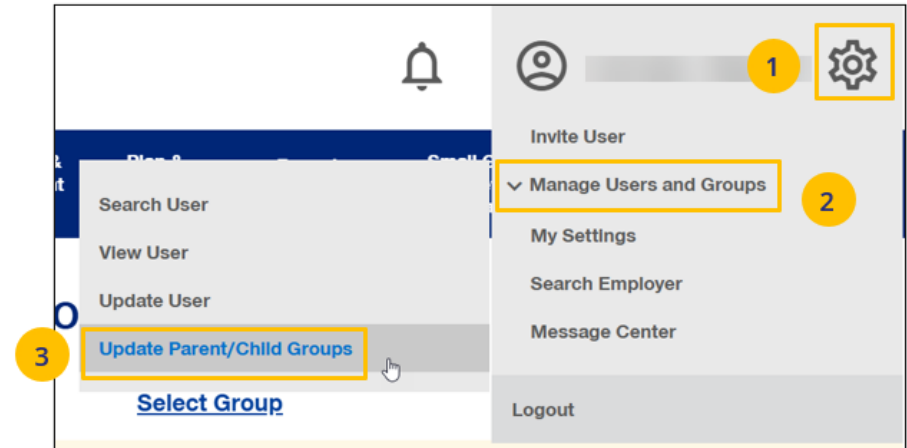
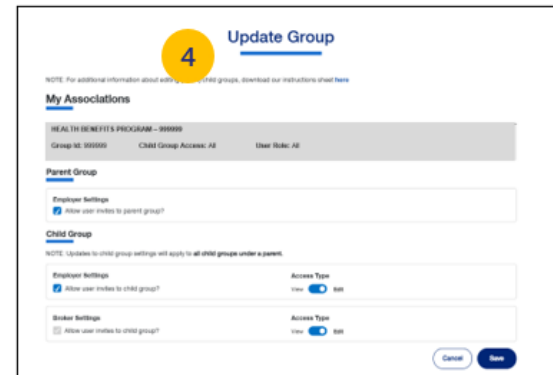
Function	Employer Lead	Employer without Reporting	Employer User	Employer View Only	Employer View Only with Member Handbook	Employer View without Member Handbook	Employer User with CER	Employer View Only with CER	Employer View with Eligibility and Reporting	Employer View with Eligibility	Employer View with Billing	Employer View with Reporting	Employer Member Management Role	Employer with Banking only	Employer CER only
Create, Update, View, Term Employer User and Master User Assignment	Y	Y	N	N	N	N	N	N	N	N	N	N	N	N	N
Member & Subscriber List	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	N	N
View Eligibility	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	N	Y	Y	N	N
View Plan Documents	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	N	N
View Member	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	N	Y	Y	N	N
Add, Update and Term Member	Y	Y	Y	N	N	N	Y	N	N	N	N	N	Y	N	N
Request ID card	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	N	Y	Y	N	N
Billing	Y	N	Y	Y	N	Y	Y	Y	N	N	Y	N	N	N	N
View Member & Employer Handbook	Y	Y	Y	Y	Y	N	Y	Y	Y	Y	Y	Y	Y	N	N
Renewal Package	Y	Y	N	N	N	N	N	N	N	N	N	N	N	N	N
Upload Documents	Y	Y	Y	N	N	N	Y	N	N	N	N	N	N	N	N
Employer Search & Display	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y
Banking Reports	Y	N	Y	Y	N	N	Y	N	Y	N	Y	Y	N	Y	N
Level Funded Reporting	Y	N	Y	Y	N	N	Y	N	Y	N	N	Y	N	N	N
View Benefit Summaries	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	N
Payroll Report (displays under Surest reports)	Y	N	N	N	N	N	N	N	N	N	Y	N	N	N	N
EDI Eligibility Reporting	Y	N	Y	Y	N	N	N	N	Y	Y	Y	Y	N	N	N
Shared Savings	Y	N	Y	Y	N	N	Y	N	Y	N	Y	Y	N	N	N

Parent/Child Groups Settings

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This section includes the steps for Employer Leads to manage Group level settings for sending manual invites and making changes to control who can manage enrollment.

1. Click the **Gear** icon.
2. Select **Manage Users and Groups**.
3. Click **Update Parent/Child Groups**.
4. The **Update Group** page appears.

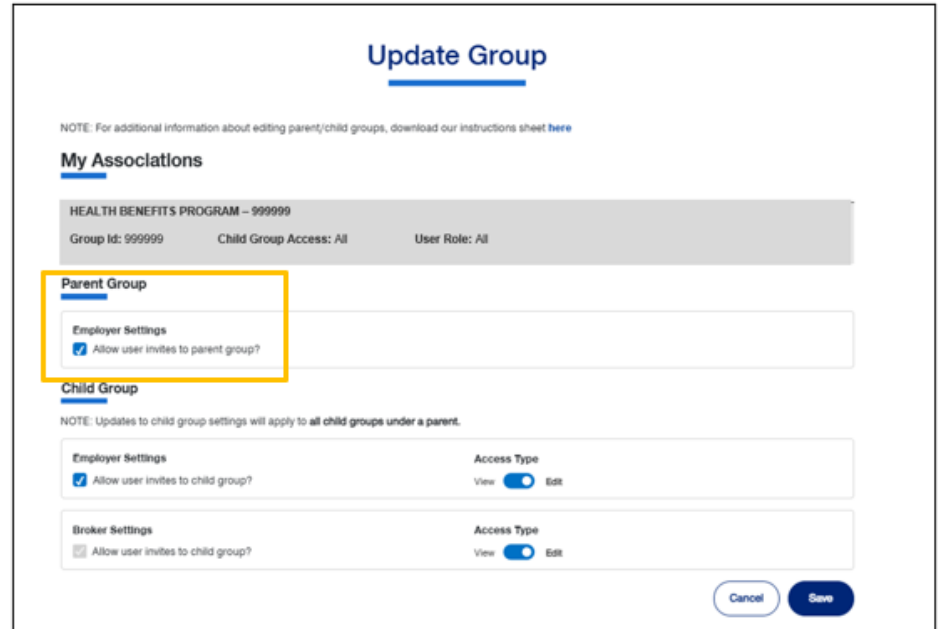
Parent Group

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Parent Group – Employer leads cannot make changes to Employer Settings initially for Parent Groups.

- **Checkbox checked** – Invitations are allowed at Parent Group level.
- **Checkbox empty** – Invitations are not allowed at Parent Group level.

Only Child Group Settings are allowed to be changed. Contact your UnitedHealthcare Account Representative if changes are needed at the Parent Group level.



Update Group

NOTE: For additional information about editing parent/child groups, download our instructions sheet [here](#)

My Associations

HEALTH BENEFITS PROGRAM – 999999
Group Id: 999999 Child Group Access: All User Role: All

Parent Group

Employer Settings
☒ Allow user invites to parent group?

Child Group

NOTE: Updates to child group settings will apply to all child groups under a parent.

Employer Settings
☒ Allow user invites to child group?

Access Type
View ☒ Edit

Broker Settings
☐ Allow user invites to child group?

Access Type
View ☒ Edit

Cancel Save

Child Group

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Employer leads can grant View or Edit access to Child Groups and Brokers.

Brokers are always associated at the child group and cannot be changed.

Once saved, changes are applied to all child groups upon next login.

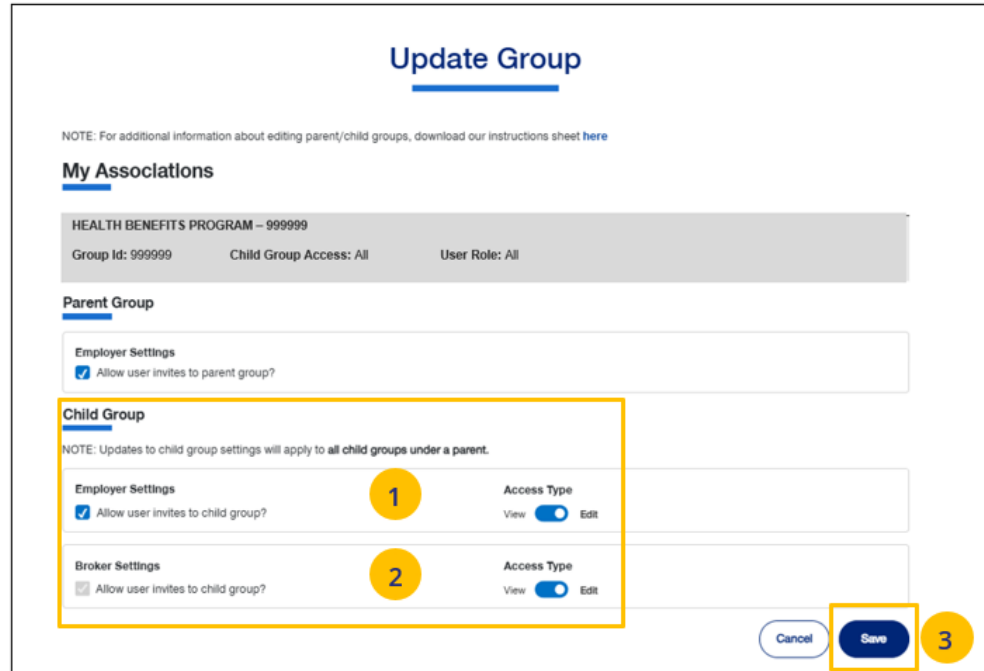
1. Allow user invites to Child Group?

- **Checkbox checked** – Invitations are allowed at Child Group level.
- **Checkbox empty** – Invitations are not allowed at Child Group level.

2. Access Type

- **View:** Child Group users have view only access for group.
- **Edit:** Child Group users have edit access to enroll members under the group.

- Click **Save** when finished. Changes are effective on next login.



Update Group

NOTE: For additional information about editing parent/child groups, download our instructions sheet [here](#)

My Associations

HEALTH BENEFITS PROGRAM – 999999

Group Id: 999999 Child Group Access: All User Role: All

Parent Group

Employer Settings

☒ Allow user invites to parent group?

Child Group

NOTE: Updates to child group settings will apply to all child groups under a parent.

Settings	Access Type
Employer Settings ☒ Allow user invites to child group?	View ☒ Edit
Broker Settings ☒ Allow user invites to child group?	View ☒ Edit

Cancel **Save**