




# United eServices Small Business Renewal Job Aid



Use this document for instructions and tips specific to utilize United eServices for Small Business Renewals.

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## Logging in

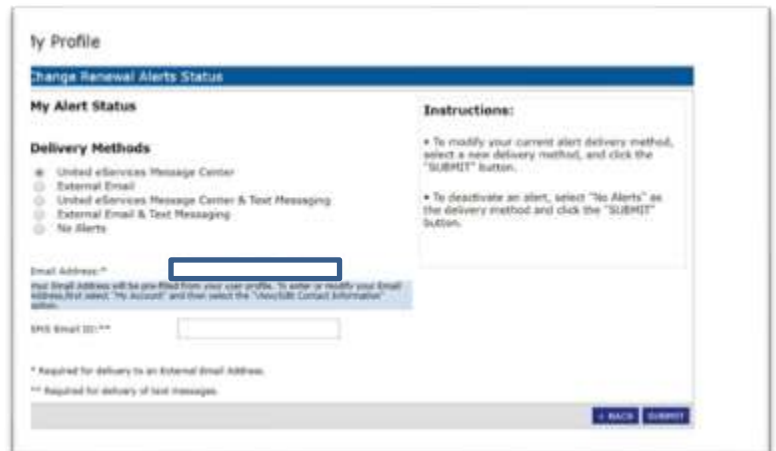
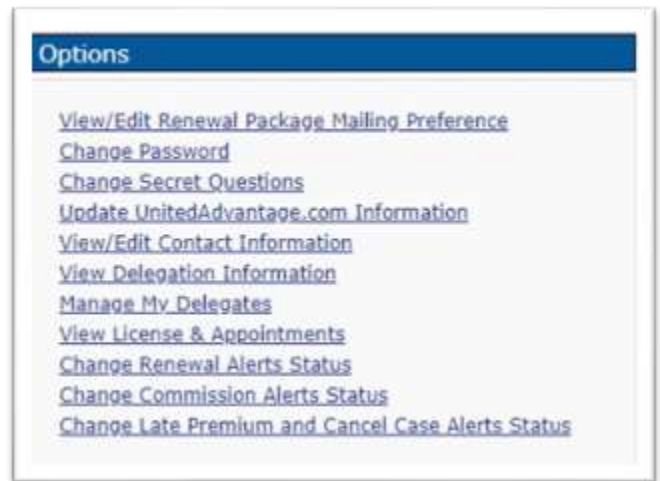
Log in to United eServices:

[www.unitedeservices.com](http://www.unitedeservices.com)



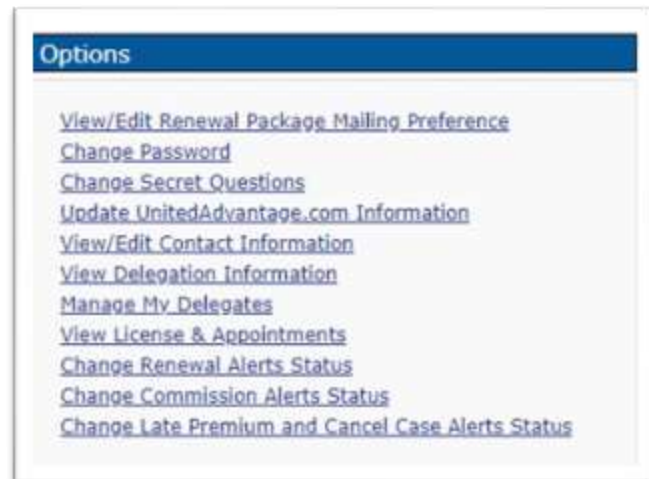
## Update e-mail address.

- Once logged in, click My Account in upper right hand corner.
- Under Options, click View/Edit Contact Information.
- Update e-mail address under Business e-mail and click Submit.



## Set up renewal notification.

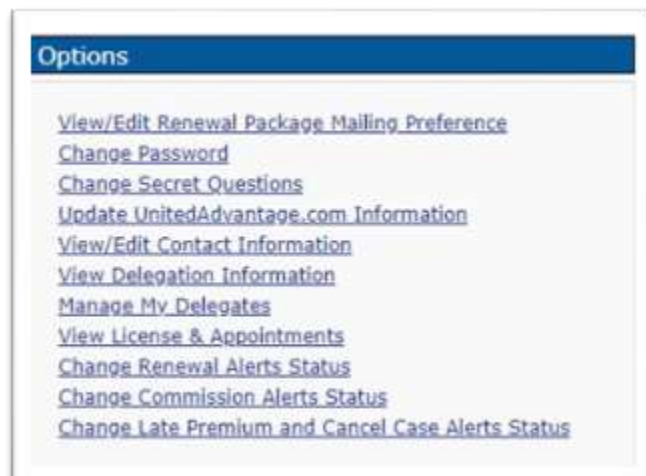
- Once logged in, click My Account in upper right hand corner.
- Under Options, click Change Renewal Alerts Status.
- Under My Alert Status, update delivery method to External Email. The email address will pre-fill from your contact information. Press Submit. An e-mail notification will be sent when renewals are posted.



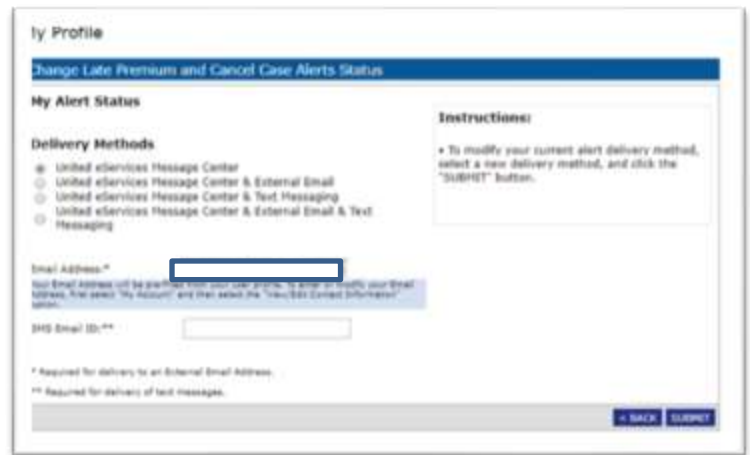
## Set up term notifications.

### Change Late Premium and Cancel Case Alerts Status

- Once logged in, click My Account in upper right hand corner.
- Under Options, select the Change Late Premium and Cancel Case Alerts Status.



- Under My Alerts Status, update delivery method to External Email. The email address will pre-fill from your contact information. Press Submit. An e-mail notification will be sent for pre-termination and termination notices are posted.



### How do I receive Pre-Termination and Termination notices?

- Pre-Termination and Termination notices are delivered via the United eServices message center. These notices will remain in the message center for 60 days from the date they are posted unless you choose to delete the message.

### When are notices available?

The following dates apply to policies renewing on the 1st of the month:

- Termination Notices will be received in the Message Center on or about the 2nd of each month.
- Pre-Termination Notices will be received in the Message Center on or about the 21st of each month.

## 2 How to access renewals



You are able to access your group's renewal electronically by logging in to [www.unitedeservices.com](http://www.unitedeservices.com).

- Click on the Renewal tab in the navigation (upper left corner)
- Search Renewals Tab:

The search feature allows you to search through your book of business (clients with up to 50 employees) by client name, customer number, policy number or a renewal date range.

Search by any combination of the following information:

- Client Name
- Customer Number (7 characters minimum)
- Policy Number (7 characters minimum)
- Renewal Date Range (search by renewal date range 6 months in advance or for a specific client by name or number up to 6 months in the past or future)

Click the Search button to search using the criteria selection; click the Reset button to return to the 90 day default.

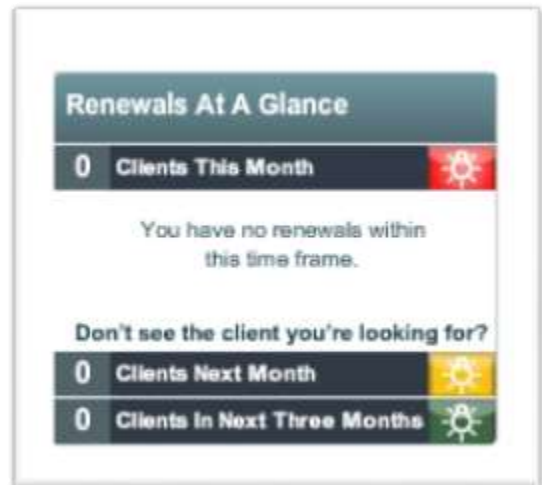
The image shows a "Search Renewals" form. At the top left is the text "Search Renewals" and at the top right is a button labeled "Filter Search Results". Below this are four input fields: "Client Name:" with a text box containing "Enter Client Name"; "Customer Number:" with a text box containing "Enter Customer Number"; "Policy Number:" with a text box containing "Enter Policy Number"; and "Renewal Date Range:" which includes "Start Date:" with a calendar icon and a dropdown menu showing "03/19/09", and "End Date:" with a calendar icon and a dropdown menu showing "06/16/09". At the bottom of the form are two buttons: "Reset" and "Search".

- This will bring you to the Renewal Dashboard where you can access renewal packages by clicking on the PDF Icon. You may have to click a dropdown menu to see the PDF icon if it shows N/A.

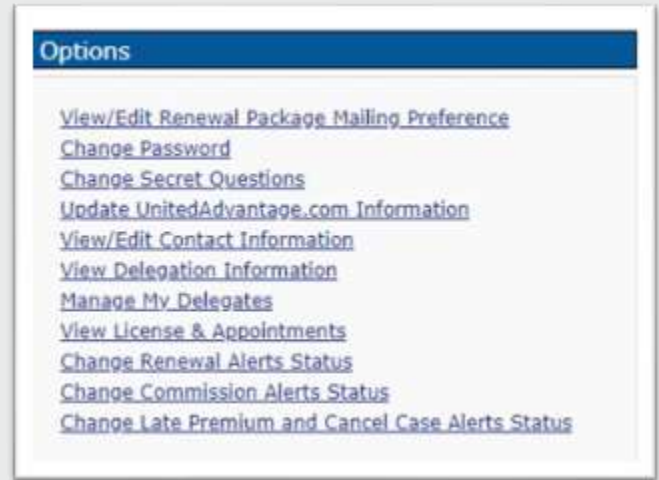
If no PDF icon is showing, please reach out to your Renewal Account Executive for a copy of the renewal.



- Renewals may also be accessed on the homepage of United eServices under the Renewals at a Glance snapshot located on the right hand of homepage.



### 3 | UeS Broker Delegation Access



### Getting Started.

United eServices is only available to registered users; individual Brokers licensed with UnitedHealthcare may register immediately. For unlicensed Agency personnel, UnitedHealthcare offers a security program called Delegation Management. Delegation Management allows Brokers the convenience of enabling United eServices access for their personnel, while at the same time restricting access to confidential information such as Commission statements.

### Security.

Brokers have been authorized to access private information on United eServices. It is imperative to not share User Names or passwords with anyone.

### Add a Delegate.

1. Login to United eServices.
2. Click the My Account link.
3. Click the Manage My Delegates link.
4. Select the ADD DELEGATE button on the My Delegates screen.

**NOTE:** If the Acting on Behalf Of drop down box is in the upper left corner of the screen, review the Acting on Behalf Of section for instructions.

5. Enter specific criteria and click the SEARCH button in the Portal User Search section.

6. Select the located user or click the CREATE NEW USER button to create a new user, as appropriate.
7. Complete all fields in the Contact Information section. Required fields are identified by an asterisk.
8. Checkmark the permissions as applicable to grant permissions:

PERMISSIONS	SELECT
<b>Quoting</b> View and copy existing quotes and create new quotes on my behalf.	<input type="checkbox"/>
<b>Commissions</b> View my commission statements.	<input type="checkbox"/>
<b>Renewals</b> View book of business and renewal package; generate ARQs.	<input type="checkbox"/>
<b>License and Appointments</b> View my Licenses & Appointments with UnitedHealthcare.	<input type="checkbox"/>
<b>Late Premium &amp; Cancel Case Alerts</b> Allow delegate to receive my Late Premium & Cancel Alerts.	<input type="checkbox"/>
<b>Receive Messages</b> Allow user to receive messages on behalf of their broker.	<input checked="" type="checkbox"/>
<b>United Advantage Report Access</b> View reports on behalf of their broker.	<input type="checkbox"/>

9. Click the SUBMIT button.



**NOTE:** If the Delegate is an existing United eServices user, an auto-generated welcome e-mail will be sent. If a new user was created, two auto-generated emails will be sent; one welcome email with a user name and link and a second email with a password.

## Disable a Delegate.

1. Login to United eServices.
2. Click the My Account link.
3. Click the Manage My Delegates link.
4. Locate the Delegate to disable in the Delegate section.
5. Choose Disable Delegate from the OPTIONS drop down menu and click the GO button.
6. Click the SUBMIT button on the Disable Broker Delegate screen.

## Modify Permissions for a Delegate.

1. Login to United eServices.
2. Click the My Account link.
3. Click the Manage My Delegates link.
4. Locate the Delegate to modify permissions for in the Delegate section.
5. Choose Modify Permissions from the OPTIONS drop down menu and click the GO button.
6. Check or uncheck the permissions as applicable to grant or deny permissions.
7. Click the SUBMIT button.

**NOTE:** The Delegate receives an e-mail notification with instructions on how to accept the terms and conditions for the Delegation role.

## Acting on Behalf Of.

United eServices allows the Delegate to select whom they wish to represent for transactions, with the convenience of a drop down box. This option is only available if the Delegate represents more than one Agency or Broker, or is a Broker who is also specifically assigned Delegation permissions for one or more Agencies.

## Delegate Training Checklist.

The following checklist provides an outline for a Broker to use when training Delegates.

**NOTE:** For all transactions, the Delegate must select the appropriate name if the Acting on Behalf of drop down box at the top left of the United eServices screen is available. This feature regulates the type of transactions Delegates are allowed to perform.

- Review the United eServices Delegation Management for Brokers Quick Reference Card.
- Outline Delegate Role and Responsibilities.
- Review Delegate Policy and Procedures.
- Walk through Delegation Management Functionality
  - General Login
  - Site Review
    - Acting on behalf of for transactions
  - Renewals
    - View, Print, Download
    - Generate a New Alternate Renewal Quote
  - Quoting
    - Run a New Quote
    - My Saved Quotes (modify, copy, finish, view)
    - My Brokers Quotes (view, copy)
  - Commissions (view, print, download)
  - License and Appointments (view)
  - Late Premium & Cancel Case (LPCC) Alerts (view, print)
  - Receive Messages (view)
  - Support Information.

## 4 | Completing a SAM renewal



### Log in.

Go to [www.unitedservices.com](http://www.unitedservices.com) and log in with your existing username/password (or register if you are a new user). Select Click here to access SAM on the Home page.

### Dashboard.

Search for a Case in “Ready” Status. You can search by Legal Name or UHC Customer Number. The drop-down option for Case Number is the UHC Customer Number.

- Enter the Case Name (group name provided in the printed renewal package) in the Search box in the upper-right corner.
- Select the search icon.
- Click the Case that says “Ready” from Case Search results. Select View (since multiples will show if they quoted in SAM).
- Select Quotes tab.
- Select View next to line that says RNQ under Type. This takes you to the Review page. When you do this, an RNA Type line will be created. This is your working file that you will use to complete your renewal submission. This is what you will view if you need to exit and come back to complete your renewal plan changes.

### Review.

- Select the Plan Code to display the detailed plan benefits. To renew “as is”, select Renew These Plans.  
Or
- To change plans, select View Plan Options. This takes you to the Consider page.

## Consider.

From the Consider page, you can review the alternate plan options or shop new plans if you'd like to see the full portfolio including new products. Enter the Case Name (group name provided in the printed renewal package) in the Search box in the upper-right corner.

- Steps to Review Alternate Plan Options:
  - Select View Alternates.
  - Select individual plans from the list or Select Package if you want all the plans.
  - Generate Proposal or, if ready, Renew These Plans and move to the Decide page.
- Steps to Shop New Plans:
  - Select Shop New Plans (link at the bottom of screen under Helpful Links)
  - Select the product you want to see. (Medical, Dental, Vision, Life, etc.)
  - Select Add to Quote for each plan.
  - Generate Proposal (or Continue) to move to Decide.

## Decide.

- Select Decide in the navigation bar at the top of the screen once you are ready to choose the final plans/products to renew.
- Review all plans previously selected and remove any plans that the employer is not going to offer.
- To deselect plans, use the Actions drop-down arrow and then select Remove This Plan.
- Pop up box “Are you ready to proceed to the renewal manager?” displays. You can either Move to Enrollment (Submit page below) or Finalize. Then Submit if renewing (as with no enrollment changes).

## Submit.

- Review to make sure that the only plans selected are the ones that the employer intends to offer for this next plan year.
- From the pop-up window, select Move to Enrollment. This takes you to the Renewal Manager screen.
- **Communication Email Address:** Enter the email address you want us to use when confirming the renewal has been processed or when requesting additional information.
- **Employer Contribution:**
  - Select Update.
  - Review employer contribution information and update if needed. If there is no update needed, click Next. **Once this is done, the renewal manager will show this section as “Complete” and reflect the date of completion.** You can come back and edit this as long as you have not yet submitted the renewal for processing.
- **Employee Management:**
  - Select Update.
  - Choose plans for each enrolling employee and their dependent(s) using the drop-down menu under each product type, or select the waive box for any product(s) you are waiving.
  - Select Add an Employee to add an employee that does not appear on the census.
  - Using the Actions drop-down arrow, select Edit Employee to make changes to employee

demographic information (i.e., add/remove dependent, address change, etc.), or select Remove Employee to remove an employee from the census.

- **Employer Information:**

- Select Update.
- **Review and make changes to the group's employer information (i.e., group's legal name, contact person, billing address, waiting period, deductible accumulation period, etc.).** You may also have additional questions that need to be answered at renewal based on updated product offerings. SAM will display an asterisk \* to indicate that information is required. You will not be able to finalize the renewal until all required fields are complete.

- **Required Documents:**

- If no required documents are listed, then skip this step. SAM will show you any documents that are required.
- For each required document, select Browse. Choose the document from your computer and then attach the appropriate file.

- **Finalize Renewal:**

- Once all the sections above have been completed, the Finalize button will be activated.
- Before finalizing the renewal, you may want to Print the information under Selected Plans. This is the summary of all of the plans that the employer is offering and the enrollment/waiver for each of those plans.
- Select Finalize and then Submit.

CONGRATULATIONS You have taken the simple, automated steps to renew your UnitedHealthcare Small Business group.

*Note: If any plan changes were made, all parties attached to the renewal will receive a Plan Change confirmation email: GA, Broker, UnitedHealthcare Renewal Account Representative. **Please note (at this time) if the group renewed as is, an automated email will only be sent to the broker and sales rep on file as this is an automated email from the Plan Change Unit and additional contacts will not receive the confirmation notice even if requested.***

If you need additional support or have questions:

- Call the SAM Help Line 1-800-486-4585 for technical system questions
- Contact your UnitedHealthcare Renewal Representative for plan or market-specific questions
- Attend one of the broker training sessions (contact your UnitedHealthcare Renewal Representative for a schedule)