

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.

Delegate Type Definitions

There are three Delegate User Types within United eServices:

1. **Broker Delegate:** Users who are authorized to use United eServices on behalf of the licensed and appointed broker.
2. **Agency Delegate:** Users who are authorized to use United eServices on behalf of the Agency.
3. **United Advantage Reporting Delegate:** Users who are authorized to use the United eServices United Advantage Reporting functionality. This is available to all United Advantage Agencies.

Delegate's Role

Delegates are selected by a Broker or Agency Administrator and are granted permissions that may allow them to:

- Quote
- View Renewals
- View Commission Statements
- View License and Appointments
- View Late Premium & Cancel Case (LPCC) Alerts
- Receive Messages

Security

Delegates have been entrusted to perform transactions on United eServices, and may have access to private information. It is imperative to not share User Names or passwords with anyone.

New User Delegation Access

Delegates must accept the terms and conditions of Delegation access prior to being able to perform transactions. To accept Delegation access as a new user to United eServices:

1. Ensure the Delegate account has been set up by the Broker or Agency Administrator.
2. Once setup, the Delegate will receive two emails from United eServices.
3. The first email contains a new username with instructions and a link to access United eServices and accept the terms and conditions of Delegation.
4. The second email will contain a temporary password.
5. Using the link provided in the email, along with the user name and password, the new Delegate will login to United eServices.

New User Delegation Access (continued)

6. Select and choose a new password.
7. Accept the Terms and Conditions of Use, the pending relationship and the Site Use Agreement.
8. Click the **SUBMIT** button.

Existing User Delegation Access

For existing United eServices users, the Delegation authority remains in Pending status until the Terms and Conditions of Use, the pending relationship and the Site Use Agreement have been accepted.

1. Login to **United eServices**.
2. Click the **My Account** link.

UnitedHealthcare®

[Home](#) | [Help](#) | [My Account](#) | [Logout](#)
[Administration](#) | [Contacts](#) | [Links](#)

3. Click on the **View Delegation Information** link.

▶ [View Delegation Information](#)

4. Click on the **You have Pending Relationships** link.

You have Pending Relationships. Click [Here](#) to Accept or Decline.

5. Accept the Terms and Conditions of Use, the pending relationship and the Site Use Agreement.
6. Click the **SUBMIT** button.

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.

Acting on behalf of: MICHAEL BUKATY
MICHAEL BUKATY
BUKATY AGENCY, THE / 0JA993 / 4400 W 109TH STE 200 / OVERLAND PARK, KS / 66211

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.