

## Getting Started

Delegation Management allows Agencies the convenience of enabling United eServices access for their personnel, while at the same time restricting access to confidential information such as Commission statements.

### Activating Delegation Management

- The Agency Principal selects a person to act as the Agency Administrator.
- The Agency Administrator receives permission to view all UnitedHealthcare information available for the Agency.
- The Agency Administrator has special functionality that enables him or her to extend United eServices access to other Agency users called Delegates.
- The Agency Administrator sets the desired permission level for each Delegate and may modify the permission level at any time.

### Agency Administrators Role

- Creating any Delegate accounts in United eServices so that Delegates may perform transactions on behalf of the Agency.
- Providing simple training to Delegates on the Delegation process. Delegates who are unfamiliar with United eServices may need information on how to perform transactions.
- Providing minimal support for Delegates with questions. Agency Administrators will provide a first level of support for Delegates.
- Modifying Delegate permissions as necessary. Permissions pertain to Quoting, Commissions, Renewals, License and Appointments, Late Premium & Cancel Case (LPCC) Alerts and Receive Messages. Delegates may receive different levels of access, and may have their access modified at any time to grant or limit permissions.
- Disabling Delegate accounts, as necessary.

**NOTE:** Agencies may have more than one Agency Administrator. The Agency Principal may request additional Agency Administrators by completing the United eServices Agency Administrator Add / Removal form and emailing it to: [ues\\_delegation@uhc.com](mailto:ues_delegation@uhc.com).

## Security

Agency Administrators have been authorized to access private information available 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 **Administration** link.



3. Click the **Manage Organization Users** link.

### Site Administration

- **Manage Organization Users**
- [View/Edit Organization Contact Information](#)
- [Manage United Advantage Report Access](#)

4. Select the **ADD DELEGATE** button on the **Agency Data** screen.

**ADD DELEGATE**

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

A screenshot of the 'Portal User Search' form. It contains two columns of instructions: 'If the user is already registered for United eServices, please enter their user name below:' and 'If you are not sure if the user is registered, or if you don't know the user name, you can search for existing users. Enter at least 2 letters for the last name and 1 letter for the first name.' Below these are input fields for 'User Name', 'Last Name', 'First Name', and 'State'. There are 'SEARCH' buttons for each field and a 'CANCEL' button at the bottom right. A 'Sort Results by:' section has radio buttons for 'Last Name', 'First Name', and 'State', with 'Last Name' selected.

6. Select the located user or click the **CREATE NEW USER** button to create a new user.

**CREATE NEW USER**

7. Complete the **Contact Information** section. Required fields are identified by an asterisk.

## Add a Delegate (continued)

8. Checkmark the permissions to grant, as applicable.

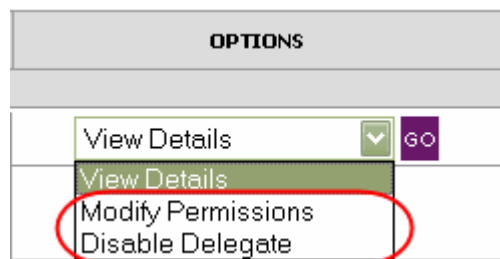
PERMISSIONS	SELECT
<b>Quoting</b> View and copy existing quotes and create new quotes on my behalf.	<input type="checkbox"/>
<b>Commissions</b> View my commission statements.	<input type="checkbox"/>
<b>Renewals</b> View book of business and renewal package; generate ARQs.	<input type="checkbox"/>
<b>License 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.

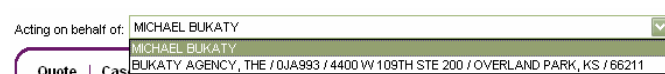
## Modify Permissions for a Delegate (continued)

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 Agent, or is a Broker who is also specifically assigned Delegation permissions for one or more Agencies.



**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.

## Delegate Training Checklist

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

- Review the United eServices Delegation Management Quick Reference materials.
- 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.