



# New Sales Bonus

For new fully insured Small Group and Key Account cases with at least 10 enrolled employees.

UnitedHealthcare is offering a bonus to agents in California who sell new medical plans with effective dates from March 1, 2020 through February 28, 2021. Eligible cases are new fully insured Small Group and Key Account groups located in California that have at least 10 enrolled employees and effective dates from March 1, 2020 through February 28, 2021. Only agents permanently located in California are eligible for the bonus. The maximum bonus for an eligible group (or collection of affiliated groups) is \$50,000.

Eligible agents will receive a bonus based on the number of enrolled employees in the eligible medical group. The bonus amounts for Harmony and Canopy Health medical coverages are higher than that of other medical coverages.

Enrolled Employees in an Eligible Group	Bonus for Each Member Enrolled for Medical Coverage (except Harmony and Canopy Health Coverage)*	Bonus for Each Member Enrolled for Harmony and Canopy Health Coverage*
10 to 49 enrolled employees	\$25	\$100
50 or more enrolled employees	\$50	\$100

\* Up to the \$50,000 maximum bonus for any eligible case or group of affiliated cases.

**Higher Bonus for Harmony and Canopy Health Coverage:** In groups where employees may choose different networks and medical coverages, the higher bonus amount is paid only on members covered by Harmony and Canopy Health medical coverage.

**Bonus Example:** An eligible agent sells two eligible medical cases and earns a bonus of \$14,750 calculated as follows:

Total Enrolled Employees in the Group	Members in Medical Coverage (except Harmony and Canopy Health Coverage)	Members in Harmony and Canopy Medical Coverage	Bonus Calculation
Group A—25 enrolled employees	10	20	10 members at \$25 = \$250; 20 members at \$100 = \$2,000; <b>Total = \$2,250</b>
Group B—160 enrolled employees	150	50	150 members at \$50 = \$7,500; 50 members at \$100 = \$5,000; <b>Total = \$12,500</b>
			<b>Total Bonus = \$14,750</b>

## Program Details:

1. Only Agents of Record permanently located in California are eligible for this program.
2. This bonus program applies only to medical groups that:
  - a. Are new fully insured Small Group and Key Account medical groups;
  - b. Are located in California;
  - c. Have at least 10 employees enrolled for medical coverage; and
  - d. Have effective dates with UnitedHealthcare from March 1, 2020 through February 28, 2021.
3. The maximum bonus for any eligible case or group of affiliated cases is \$50,000.
4. All sold business must be active and the selling agent must remain the Agent of Record on February 28, 2021 to be included in the bonus calculations.
5. Classification of a group as a Small Group or Key Account medical plan are determined by us considering a number of factors, including the enrollment at some point in time. Not all larger groups are classified as Key Account groups. We reserve the right to classify groups according to our rules, regardless of a group's actual enrollment at any time.
6. The enrolled employee counts will be derived from the medical plan only, and will be based on the number of enrolled medical employees as of the group's effective date. UnitedHealthcare's determination of enrolled employee and member count is final.
7. All bonus payments will be made to the agent or agency to which the commissions are paid. The bonus will be paid after the bonus period is over and when all information required for verification of enrollment data and calculation of the bonus is available.
8. For dual or multiple broker arrangements, enrolled employee and member credit for payment calculations will be allocated in the same proportion as the commissions are split on the case. Fractional credits will be used in the calculation, and credits will not be rounded to the nearest integer.
9. General Agents are not eligible for the bonus.
10. Cases and members transferring into Small Group and Key Account medical groups from another UnitedHealth Group subsidiary, business segment, medical coverage, product or case size segment will not be considered new business for this bonus program. Agent of Record changes on existing UnitedHealthcare cases will not be credited as new business for this bonus program.
11. Special rules apply to payment of bonuses for non-commissionable customers and customers referred to as "Governmental Entities" in the UnitedHealthcare Agent/Agency Agreement. We require written customer acknowledgment and approval before paying bonuses on all non-commissionable customers, and on commissionable governmental entity customers. Any limits on compensation in the RFP, RFI, bid specifications or other written instructions for governmental entities cannot be exceeded. Please refer to the Producer Compensation Policies and Practices in the Producer Performance Guide for more information.

All terms and conditions of the UnitedHealthcare Agent/Agency Agreement and the Producer Performance Guide apply to all compensation programs. This Bonus Program is offered at the sole discretion of UnitedHealthcare and can be terminated or modified by UnitedHealthcare at any time and without notice.

