

# All Savers® Alternate Funding Migration Process Overview Checklist for Brokers and General Agents

Use this checklist to ensure a smooth and consistent migration process:

	<b>Task</b>																																								
<input type="checkbox"/>	<div style="background-color: #003366; color: white; padding: 5px; display: flex; align-items: center; justify-content: space-between;"> <span style="font-size: 24px; font-weight: bold;">01</span> <span style="font-weight: bold;">Confirm or Obtain Appointment</span> </div> <ul style="list-style-type: none"> <li><b>Confirm Appointment:</b> Brokers and Affiliated GAs* who are unsure if the writing agent is appointed should send an inquiry to All Savers Credentialing via Outlook email <a href="mailto:uholcaallsavers@uhc.com">uholcaallsavers@uhc.com</a> with the following:  <b>Subject line:</b> All Savers Broker Appointment Verification for Potential Migration  <b>Body:</b> <ul style="list-style-type: none"> <li>Agency name</li> <li>Broker name</li> <li>National Producer Number</li> <li>State where broker is located</li> <li>Situs of employer to be quoted</li> <li>Existing GA affiliation</li> </ul> </li> <li><b>*Obtain Appointment (if Unappointed):</b> If you aren't affiliated or need to tie a GA to a group, contact your UnitedHealthcare Renewal Account Executive (RAE) to complete the paperwork to secure your appointment (866-432-5992).</li> </ul>																																								
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## 04 Access myallsavers.com

- Go to [myallsavers.com](https://myallsavers.com) and follow the prompts to create your Optum ID (contact your RAE for help in getting access to myallsavers.com).
- **Need Access for Others?** Send a request to [uhomyallsaversinfo@uhc.com](mailto:uhomyallsaversinfo@uhc.com) or call All Savers Broker Service Center (800-291-2634). You will need to provide:
  - Individual's first and last name
  - Individual's email

## 05 Accept the Quote/ Submit Case/Manage Installation

### Use DocuSign\* (Preferred):

- Access the employer electronic documents on myallsavers.com under Forms and Brochures.
- Select the applicable state.
- Attach the final Census spreadsheet. (All enrollments must be accounted for – no late enrollees.)
- Confirm rates through the All Savers website to receive an email asking for individual plan selection for employees (do this through All Savers website).
- An email will be sent with the Policy number.
- ID cards are sent within 24 hours.

\*[Click here for DocuSign training.](#)

### If not using DocuSign\*\* send an email to your RAE with the following information:

- Confirmation of final Census spreadsheet containing UHC current enrollment for the Employer to update. (All enrollments must be accounted for – no late enrollees.)
- New Employer application (available on myallsavers.com).
- Excess Loss application (available on myallsavers.com).
- NY Surcharge Form or Opt Out Form (accessed through myallsavers.com or sent to you by your RAE regardless of Employer location).
- Billing & Collections Agreement (accessed through myallsavers.com or sent to you by your RAE).
- Any existing or new Specialty products. If new Specialty products, also complete the combined medical and specialty employer application (accessed through myallsavers.com or sent to you by your RAE).
- GA designation, if applicable.
- **Important:** Include group termination instructions indicating if this would be a full cancellation or partial. If partial, identify which products the employer is keeping. Note: You can keep your current Ancillary lines.
- Once rates are confirmed, All Savers will send an email asking for individual plan selection from employees (it will include directions on how to complete this through [myallsavers.com](https://myallsavers.com)).
- All Savers will send an email with the Policy number and ID Cards are sent within 24 hours.

\*\*If not using DocuSign, please note that we need 'wet' signatures on all documents.

Administrative services provided by United HealthCare Services, Inc. or their affiliates. Stop-loss insurance is underwritten by All Savers Insurance Company (except MA, MN and NJ), UnitedHealthcare Insurance Company in MA and MN, and UnitedHealthcare Life Insurance Company in NJ. 3100 AMS Blvd., Green Bay, WI 54313, 1-800-291-2634.