

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

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

## Task

### 01 Confirm or Obtain Appointment

- **Confirm Appointment:** Brokers and Affiliated GAs\* who are unsure if the writing agent is appointed should send an inquiry to All Savers Credentialing via Outlook email [uholcaallsavers@uhc.com](mailto:uholcaallsavers@uhc.com) with the following:
 

**Subject line:** All Savers Broker Appointment Verification for Potential Migration

**Body:**

  - Agency name
  - Broker name
  - National Producer Number
  - State where broker is located
  - Situs of employer to be quoted
  - Existing GA affiliation
- **\*Obtain Appointment (if Unappointed):** 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).

### 02 Check Eligibility/Request Quote

- Check the chart below to ensure your group is not restricted **due to ERISA laws and regulations**.
- Ensure the group meets minimum eligibility requirements based upon situs state.
- Contact your UnitedHealthcare Renewal Account Executive (RAE) to confirm your group is eligible for and to request a quote (866-432-5992).

| All Savers restricts sales from the following SIC Codes that are not subject to ERISA laws & regulations |  |             |  |             |  |             |                                     |
|--|--|-------------|--|-------------|--|-------------|-------------------------------------|
| <b>43xx</b>  | U.S. Postal Service                                      | <b>8211</b> | Elementary and Secondary Schools   | <b>8222</b> | Junior Colleges and Technical Institutes                       | <b>8231</b> | Libraries                           |
| <b>8299</b>  | Schools & Educational Services, not elsewhere classified | <b>8661</b> | Churches, Temples, and Shrines, and Non-Church Religious Organizations (convent, monastery, religious instruction) | <b>91xx</b> | Executive, Legislative, And General Government, Except Finance | <b>92xx</b> | Justice, Public Order, and Safety   |
| <b>93xx</b>  | Public Finance, Taxation, and Monetary Policy            | <b>94xx</b> | Administration of Human Resource Programs  | <b>95xx</b> | Administration of Environmental Quality and Housing Programs   | <b>96xx</b> | Administration of Economic Programs |
| <b>97xx</b>  | National Security and International Affairs              | <b>99xx</b> | Non-classifiable Establishments  |             |  |             |                                     |

### 03 Review the Quote

- Confirm the accuracy of the following items on the quote you received via email or accessed from myallsavers.com:
  - Situs state
  - Zip Code
  - Eff Date
  - SIC Code
  - Medical Tracking Year
  - Medicare or Group Plan Primary
  - PEPM Commission
- Contact your Renewal Account Executive if changes are needed (866-432-5992).

**Note:**

- **Any change in information could result in an Underwriting review or rate revision and delay in process.**
- **All census changes need to be received prior to group installation.**

## 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.