



Uhceservices.com Reference Guide for Brokers



About this Document

This guide is designed for **Brokers** with access to uhceservices.com.

It provides information on how to navigate uhceservices.com, where you find specific information and how to perform tasks relevant to brokers, including:

- Access to small group quoting and renewals and small group renewal packages (PDF documents) information
- Enrolling and updating member information, including terminating members and requesting or printing health plan ID cards
- Billing and payment information
- Member and subscriber lists and access to Member and Employer Handbooks, and Summaries of Benefits and Coverage (SBC)
- View commissions
- Viewing benefits for a specific plan
- Resources to find helpful information

Using this Document

Click any topic in the [Table of Contents](#) to jump to that topic.

Click the [TABLE OF CONTENTS](#) link in the top right corner of each page to return to the Table of Contents.



Table of Contents

1 How to Register: Email Invitation	5
1 How to Register: Login Re-Direct from United eServices (UeS)	12
1 Access and Log In with OneHealthcare ID	16
1 Access: New to Site.....	17
1 Access: Lost or Expired Invitation	19
2 Home.....	20
3 Quickly Access Your Management Tools	21
4 Gear Icon	22
4 Invite User	23
4 Manage User	25
4 Re-Invite a User	26
4 My Settings	28
4 Manage Broker	29
4 Manage My Profile	31
4 Roles and Permissions (My Associations).....	34
4 View and Update Broker Contact Information.....	35
4 Message Center	36
5 Group Selection	37
5 Group Selection: PEO Groups.....	38
6 Small Group Quoting & Renewals	39
6 Help Me Decide	40
6 Quick Links: Small Group Renewal Packages.....	43
6 Quick Links: Upload Documents	46
6 Quick Links: United eServices (UeS).....	48
6 Quick Links: MyAllSavers (Level Funded).....	50
6 Quick Links: SAM	51
6 Quick Links: IDEA.....	52
6 Quick Links: Product Grids	53



6 Small Group Quoting & Renewal (SAMx, MyAllSavers)	54
7 Manage Members.....	55
7 Member Search.....	56
7 View Member	57
7 Enroll Member	58
7 Update Member.....	64
7 Terminate a Member’s Coverage	67
7 Request a Health Plan ID Card.....	71
7 Reinstate Member	73
8 Billing & Payment	76
9 Reports	77
9 Member & Subscriber Lists.....	78
9 MLR Reporting.....	81
9 Banking Reports	82
9 Level Funded	84
9 Account Overdue Balance Report	85
10 Plan Documents	87
10 View Benefits.....	88
10 Summary Benefit Coverage.....	89
10 Member Handbook.....	90
10 Employer Handbook.....	91
11 Resources.....	92
11 Tools & Resources	93
11 Find a Provider.....	94
11 Upload Documents	103
11 Employee Engagement Planner	105
12 Commissions	108
13 oxfordhealth.com.....	109
14 Other Applications	110
Appendix: Broker Roles and Permissions	111
Appendix: Employer Roles and Permissions	112



1 | How to Register: Email Invitation

NOTE: UnitedHealthcare has taken important steps to modernize tools and resources, simplify administration and bring new products to market quicker. To support this strategy, brokers will use uhceservices.com, our new broker and employer website, to access capabilities currently on United eServices® and myallsavers.com. The uhceservices.com site will play a critical role in delivering a more consolidated, streamlined, and user-friendly UnitedHealthcare experience for users.

This only applies to Brokers and General Agents. Internal users must gain access through Secure.

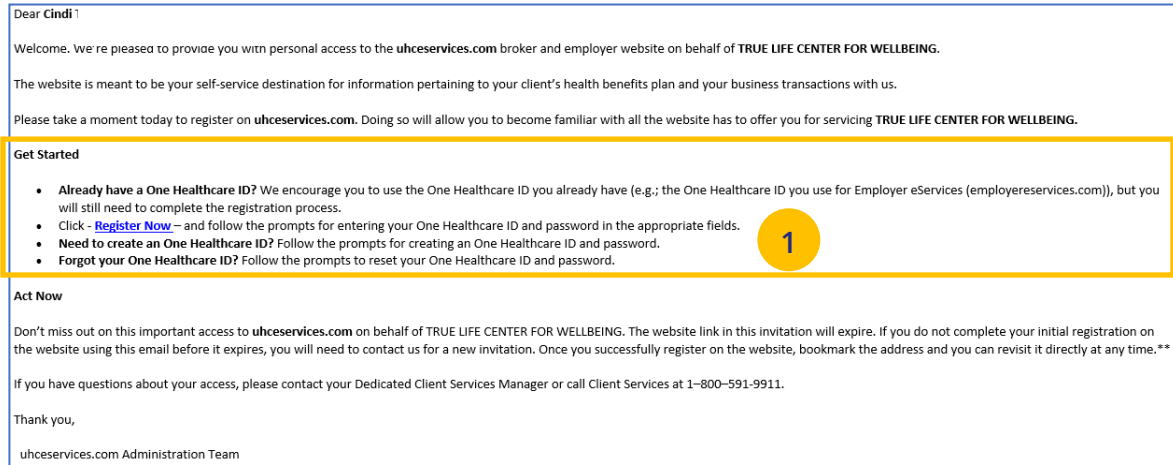
Employers are invited to uhceservices via email. Brokers can be invited in two ways:

1. Email invitation
2. Login re-direct from United eServices

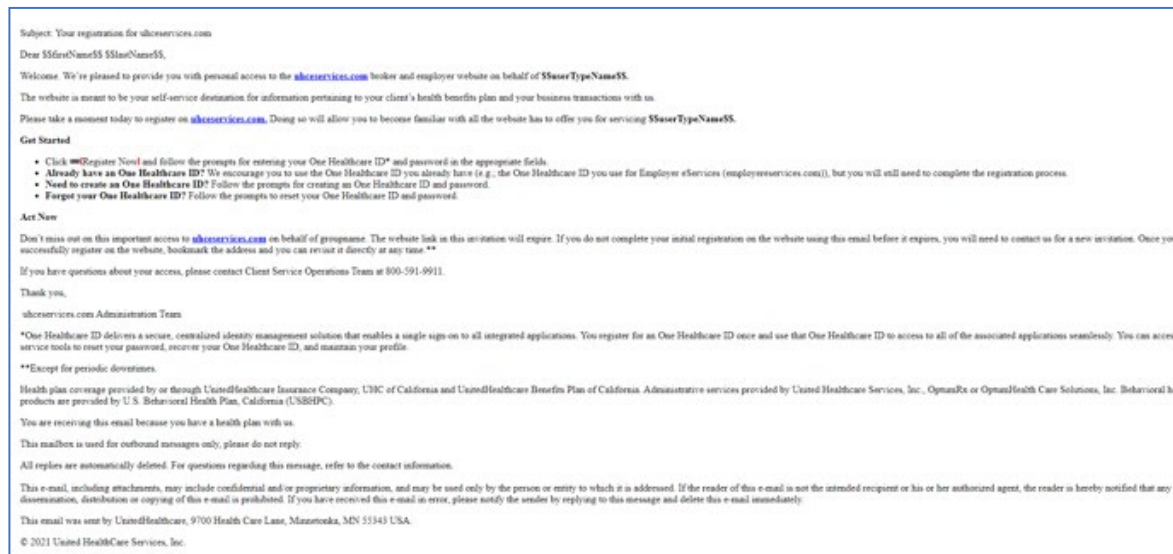
Follow these steps to register for uhceservices after receiving an email invitation.

1. When you receive your email invitation, click the **Register Now** link within the email. The **Create One Healthcare ID screen displays.**

Note: If you already have a One Healthcare ID, click the **Sign in now** link in the **Already have One Healthcare ID** box. You will go to the Sign In screen where you can sign in with your existing ID.



Email Invitation to Brokers and Employers (Cirrus)



Email Invitation to Brokers and Employers (UnitedHealthcare HMO)




1 | How to Register: Email Invitation (continued)

[TABLE OF CONTENTS](#)

2. Complete the **Profile Information** that includes your **First Name, Last Name** and **Year of birth**.

Create One Healthcare ID


One Healthcare ID securely manages your account so that you can use one One Healthcare ID and password to sign in to all integrated applications.

 [Already have One Healthcare ID? Sign in now](#)

Profile Information

First name

Last name

Year of birth
 




1 | How to Register: Email Invitation (continued)

- 3. Enter information in the **Sign In Information** section.


Sign In Information

Your email address


Create One Healthcare ID

Your One Healthcare ID must have:

- 6 to 50 characters
- At least one letter 
- No spaces
- No letters with accents
- None of these Symbols: % + " & [\] ^ ' { | } < > # , / ; () : * = ~


Create password

Your password must have:

- Between 8 and 100 characters
- At least 1 uppercase letter
- At least 1 lowercase letter
- At least 1 number
- No spaces and no & symbol

Type password again



1 | How to Register: Email Invitation (continued)

4. Enter your **Security Questions and Answers**. These will be used to verify your identity when you sign in to uhceservices.
5. Click **I Agree**. You have completed the process to create your One Healthcare ID.

Security Questions and Answers 4

Security question 1

Security answer 1

Security question 2

Security answer 2

Security question 3

Security answer 3

You must agree to the [Terms of Use](#) and [Website Privacy Policy](#) to use the One Healthcare ID service. If you do not agree, click Cancel and do not use any aspect of the One Healthcare ID service.

5



1 | How to Register: Email Invitation (continued)

- 6. You will get an email with a 10-digit activation code. Enter the code in the 10-digit activation code box and click **Next**.
- 7. Click the **Activate my One Healthcare ID** box.

Next Step: Verify Your Email Address

1. **Check your email inbox** (chi*****i1@optum.com) for a message from One Healthcare ID (noreply@onehealthcareid.com).
2. **Click on the activation link** in the email or [enter the 10-digit activation code](#).

10-digit activation code

6

Still waiting for your activation code? [Resend email](#) or [update email address](#)

If you don't see it, check your junk or spam folders. You may need to resend the message or add our address to your approved senders.

If you'd like assistance, contact support at 1(855)819-5909 or optumsupport@optum.com

Confirm your One Healthcare ID email address

OH One Healthcare ID-NoReply <noreply@onehealthcareid.com>
To Chintakayala Bhavani
Retention Policy UHGInbox (90 days) Expires 6/23/2021 Thu 3/25/20

One Healthcare ID

Your One Healthcare ID

7

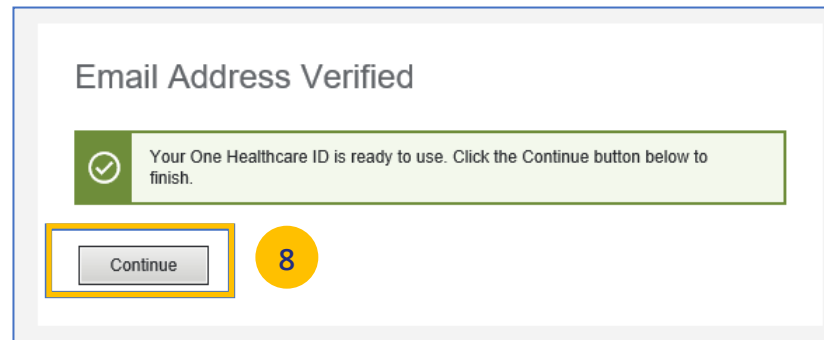
If you prefer, copy this 10-digit code 1571003356 and paste it into the box for the activation code on the Activate Your One Healthcare ID page.

If you did not request an activation link or code, or if you have questions about setting up an One Healthcare ID, contact us at 1(855)819-5909 or optumsupport@optum.com.

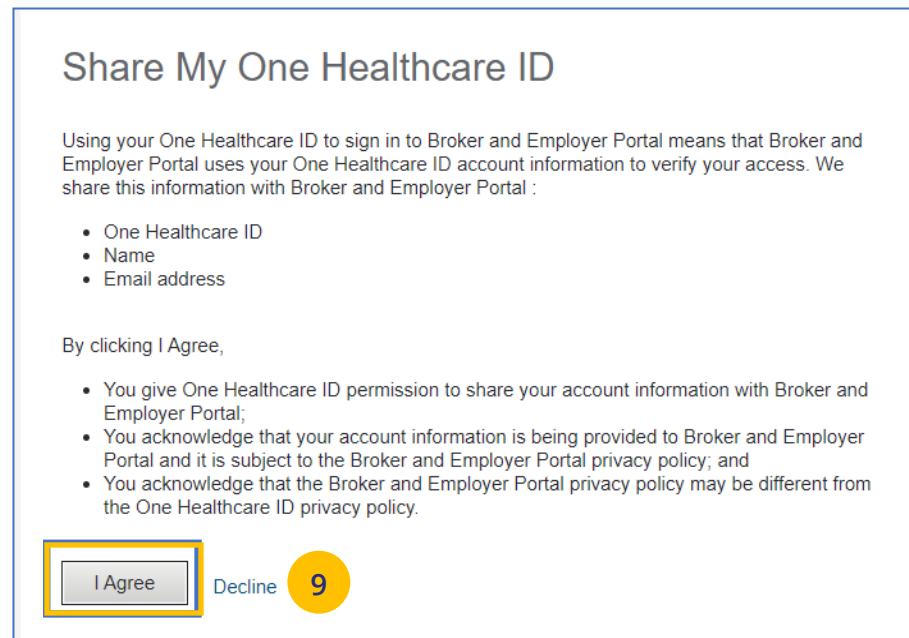


1 | How to Register: Email Invitation (continued)

8. Click **Continue**.
9. Click **I Agree**.



The screenshot shows a confirmation screen titled "Email Address Verified". At the top, there is a green checkmark icon in a square, followed by the text: "Your One Healthcare ID is ready to use. Click the Continue button below to finish." Below this message is a button labeled "Continue" which is highlighted with a yellow border. To the right of the button is a yellow circle containing the number "8".



The screenshot shows a screen titled "Share My One Healthcare ID". The text reads: "Using your One Healthcare ID to sign in to Broker and Employer Portal means that Broker and Employer Portal uses your One Healthcare ID account information to verify your access. We share this information with Broker and Employer Portal :". Below this is a bulleted list of shared information:

- One Healthcare ID
- Name
- Email address

Below the list, it says "By clicking I Agree," followed by another bulleted list of terms:

- You give One Healthcare ID permission to share your account information with Broker and Employer Portal;
- You acknowledge that your account information is being provided to Broker and Employer Portal and it is subject to the Broker and Employer Portal privacy policy; and
- You acknowledge that the Broker and Employer Portal privacy policy may be different from the One Healthcare ID privacy policy.

At the bottom, there are two buttons: "I Agree" (highlighted with a yellow border) and "Decline". To the right of the "Decline" button is a yellow circle containing the number "9".



10. You will be asked to attest to the **Terms of Use** and **Privacy Policy**. You need to select each document which will open the document for you to review. Once you open each document and select the corresponding checkboxes, the **Agree** button will be enabled.

11. Click **Agree**. You are now ready to use uhceservices.com,

The screenshot displays the 'Attestation' screen. At the top, the word 'Attestation' is centered in a large blue font with a blue underline. Below this, a blue horizontal line is present. The text 'Please click each document link to enable the checkbox.' is centered. There are two checkboxes, each with a corresponding link: 'I have read and agree to the [Terms of Use](#)' and 'I have read and agree to the [Privacy Policy](#)'. A yellow box highlights these two checkboxes, with a yellow circle containing the number '10' to its right. Below the checkboxes, there are two buttons: 'Agree' (a white button with a blue border) and 'Disagree' (a solid dark blue button). A yellow circle containing the number '11' is positioned to the left of the 'Agree' button.



1 | How to Register: Login Re-Direct from United eServices (UeS)

What is happening?

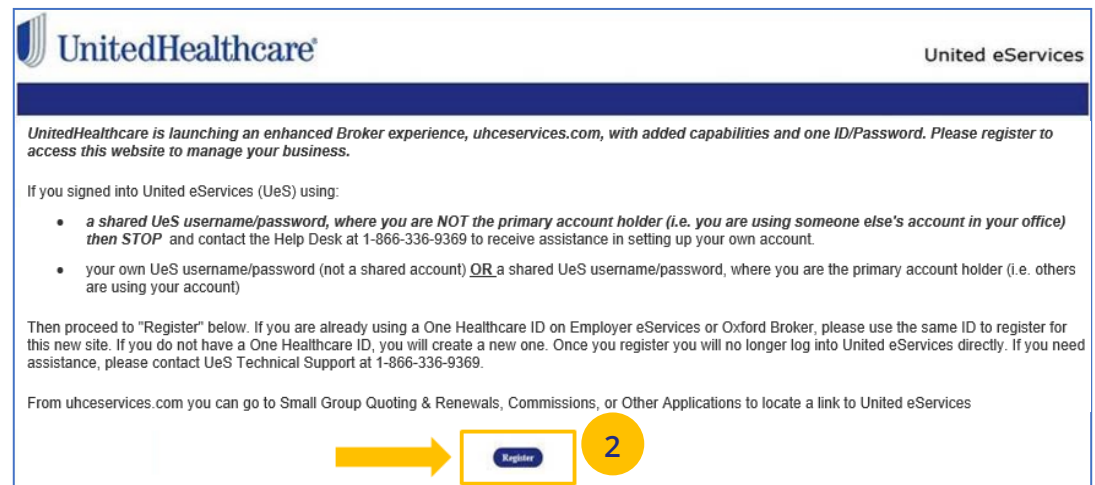
- Brokers will be transitioned from United eServices (UeS) to uhceservices by market in a phased approach. You will receive a message upon logging into United eServices, directing you to register for uhceservices.
- After registering, you will then use uhceservices as your Broker site and access UeS directly from uhceservices.
- You can only access UeS directly from uhceservices.com.

Follow the steps below to register for uhceservices.com from UeS.

1. Log in to UeS. You will be asked to register for uhceservices.com.

Note: The text in this message will differ for **UnitedHealthcare HMO** users.


2. Click **Register**.



- 3. Enter information to create your **One Healthcare ID**.
- 4. Verify your email address. Click **Next**.

Create One Healthcare ID


One Healthcare ID securely manages your account so that you can use one One Healthcare ID and password to sign in to all integrated applications.

 **Already have One Healthcare ID? Sign in now**

Profile Information


First name


Last name


Year of birth
 

Sign In Information

Your email address

Create One Healthcare ID
 

Your One Healthcare ID must have:
 6 to 50 characters



Next Step: Verify Your Email Address


1. **Check your email inbox** (chi*****1@optum.com) for a message from One Healthcare ID (noreply@onehealthcareid.com).
2. **Click on the activation link** in the email or [enter the 10-digit activation code](#).

10-digit activation code

Still waiting for your activation code? [Resend email](#) or [update email address](#)

If you don't see it, check your junk or spam folders. You may need to resend the message or add our address to your approved senders.

If you'd like assistance, contact support at 1(855)819-5909 or optumsupport@optum.com



1 | How to Access and Sign in to UeS via uhceservices (continued)

5. Click **Activate my One Healthcare ID**.
6. Click **Continue**.
7. Click **I Agree**.

Confirm your One Healthcare ID email address

One Healthcare ID-NoReply <noreply@onehealthcareid.com>
To: UHGInbox (90 days) Expires: 6/23/2021 Thu 3/25/21

One Healthcare ID

Your One Healthcare ID

Activate my One Healthcare ID 5

If you prefer, copy this 10-digit code 1571003356 and paste it into the box for the activation code on the Activate Your One Healthcare ID page.

If you did not request an activation link or code, or if you have questions about setting up an One Healthcare ID, contact us at 1(855)819-5809 or optumsupport@optum.com.

Email Address Verified

Your One Healthcare ID is ready to use. Click the Continue button below to finish.

Continue 6

Share My One Healthcare ID

Using your One Healthcare ID to sign in to Broker and Employer Portal means that Broker and Employer Portal uses your One Healthcare ID account information to verify your access. We share this information with Broker and Employer Portal:

- One Healthcare ID
- Name
- Email address

By clicking I Agree,

- You give One Healthcare ID permission to share your account information with Broker and Employer Portal;
- You acknowledge that your account information is being provided to Broker and Employer Portal and it is subject to the Broker and Employer Portal privacy policy; and
- You acknowledge that the Broker and Employer Portal privacy policy may be different from the One Healthcare ID privacy policy.

I Agree Decline 7

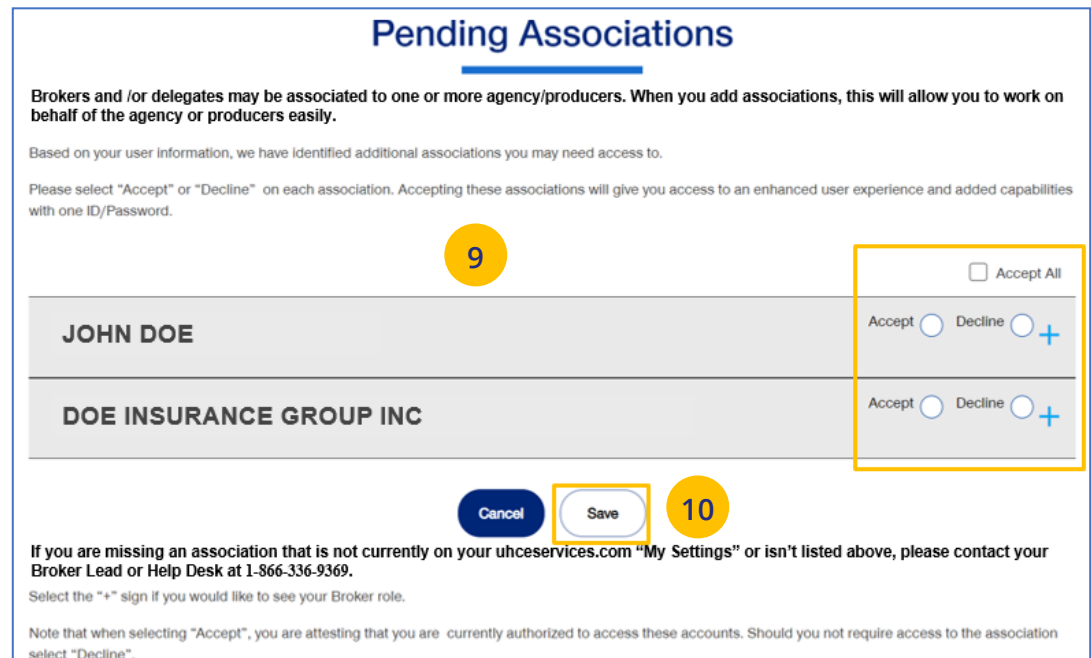
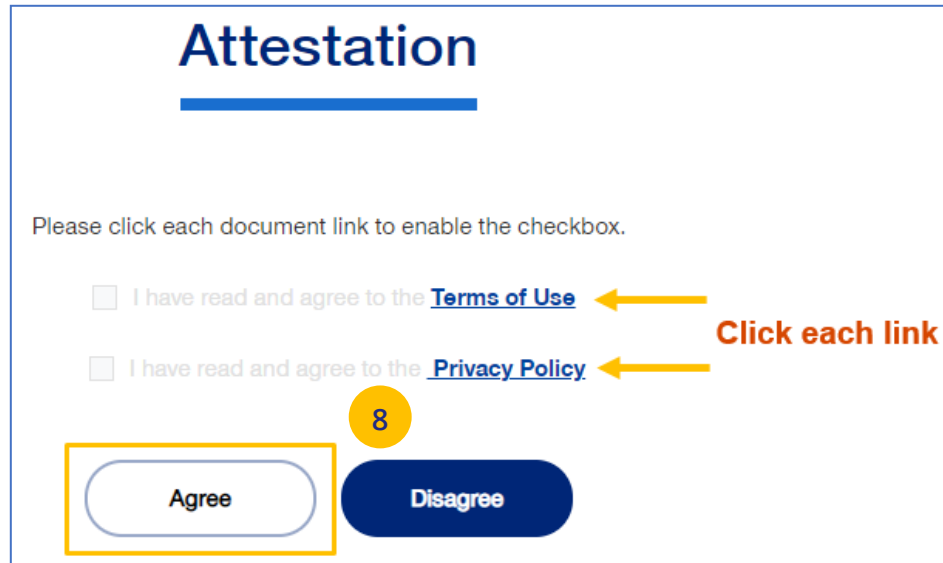


- Follow the Attestation process by clicking each link (Terms of Use and Privacy Policy). Then click **Agree**. The **Pending Associations** screen displays.

Note: Pending Associations - Each user, whether you are a broker or a delegate, are associated to one or more agencies or producers. This allows you to easily work on their behalf: quoting new business, managing renewals, etc. You must be associated with all the commission codes used so you can see all your groups.

- Select **Accept** to accept any or all Broker associations.
- Click **Save**. The uhceservices.com Home Page displays.

Note: Help - If you currently share a UeS login and need assistance setting up your account, call the UeS Help Desk at 866-336-9369. You can also call this number to (1) report any missing agency/producer associations, or (2) report any issues associated with the transition.



1 | Access and Log In with OneHealthcare ID

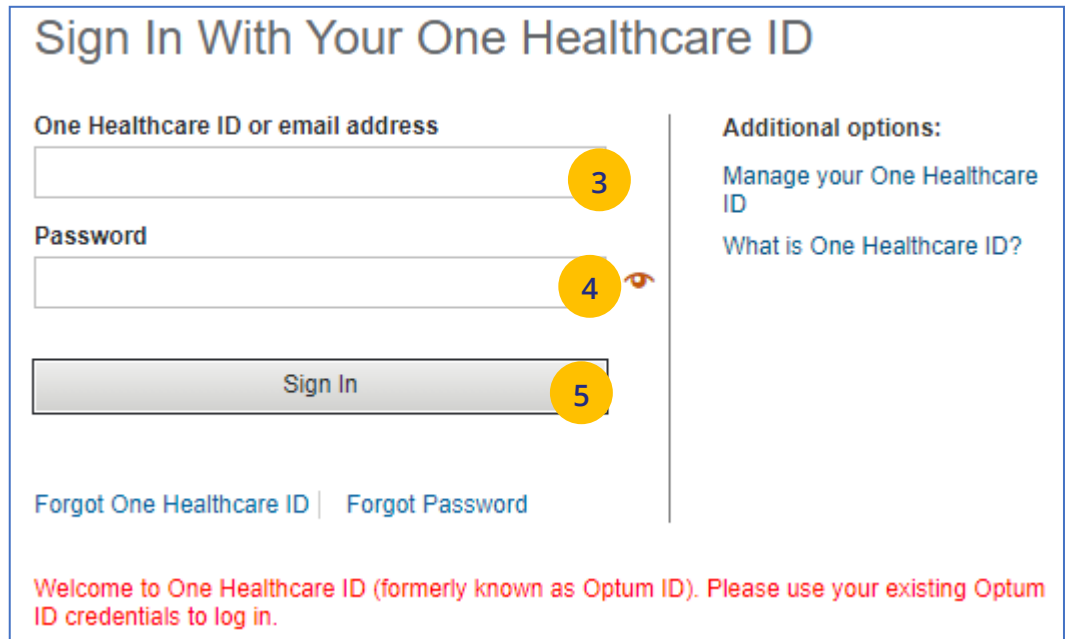
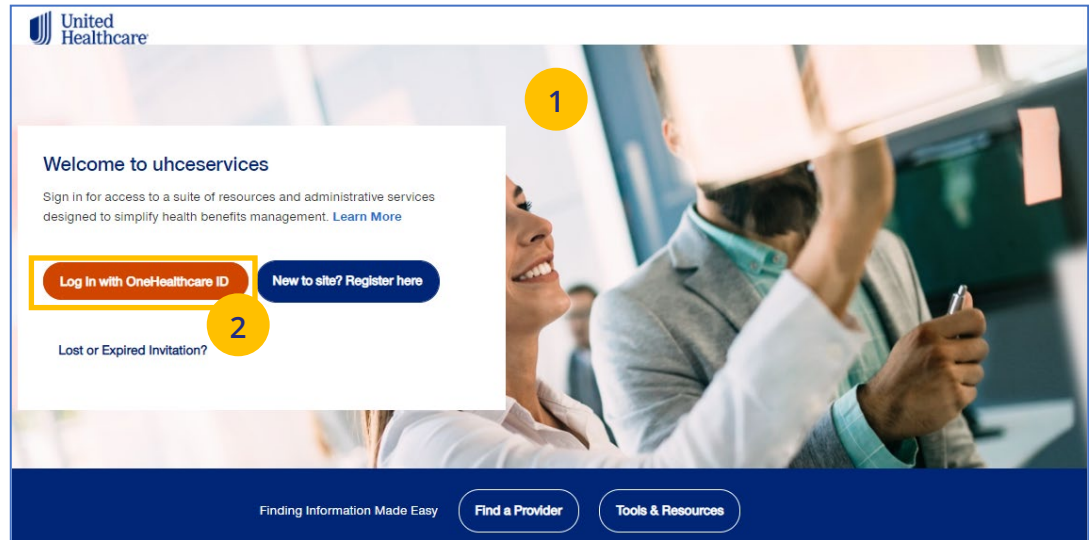
NOTE: Follow the steps below after receiving your official access invite email from uhceserv_invite@uhc.com.

1. Go to uhceservices.com. The Log In page displays.
2. Click the **Log In With OneHealthcare ID** button.
3. Enter your One Healthcare ID in the **One Healthcare ID or email address** field.
4. Enter your Password in the **Password** field.
5. Click **Sign In**. The **Home** page displays.

What information will you see?

uhceservices.com is used by both brokers and employer groups. The content you see is tailored based on your login credentials as either a broker or representative of the employer group. You as a broker, and your delegates, see information that's relevant to you.

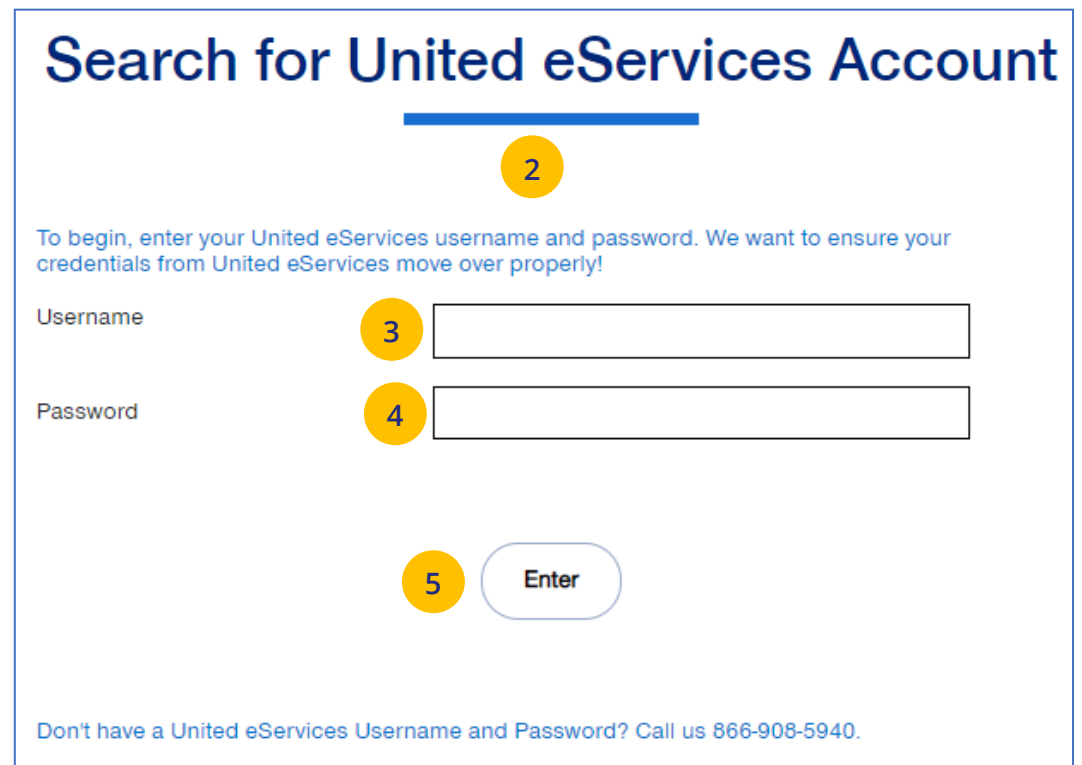
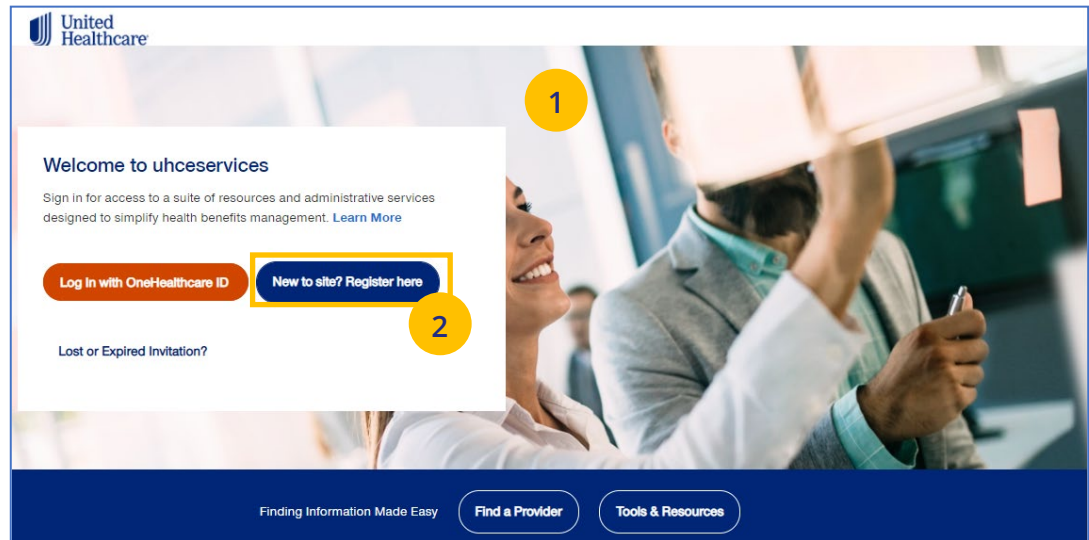
NOTE: If user is inactive for 13 months, the account will be deactivated.



1 | Access: New to Site

NOTE: If you are new to uhceservices and do not have a OneHealthcare ID, follow the steps below.

1. Go to uhceservices.com. The Log In page displays.
2. Click the **New to site? Register here** button. The **Search for United eServices Account** screen displays.



1 | Access: New to Site (continued)

3. Enter your UeS user name in the **Username** field.
4. Enter your UeS password in the **Password** field.
5. Click **Enter**. You will get a message that you have successfully migrated to uhceservices.com. You will receive an email with the link to register.

Note: If you have a User ID that has already migrated from UeS, you can follow the prompts to create your own account.

United Healthcare

Search for United eServices Account

To begin, enter your United eServices username and password. We want to ensure your credentials from United eServices move over properly!

Username

Password

You've been successfully migrated to uhceservices.com! You will no longer be able to access United eServices through United eServices login but can through uhceservices. Check your inbox for the subject line: Your registration for uhceservices.com.

Don't have a United eServices Username and Password? Call us 866-908-5940.

Your registration for uhceservices.com

uhceserv_invite@uhc.com
To Gerber, Kathleen M
Retention Policy UHGINbox (90 days) Expires 3/6/2022

Dear Olivia Gerber,

Welcome. We're pleased to provide you access to the uhceservices.com broker and employer website on behalf of Olivia Gerber.

Uhceservices.com is meant to be your self-service destination for information pertaining to UnitedHealthcare commercial groups.

Please take a moment today to register on uhceservices.com. Doing so will allow you to become familiar with all the website has to offer you for servicing:

GERARDI INSURANCE SERVICES INC
RAY SMITH
MACK JACKSON

Get Started

- Click [Register](#) and follow the prompts for entering your One Healthcare ID and password in the appropriate fields.
- Need to create a One Healthcare ID? Follow the prompts for creating a One Healthcare ID and password.
- Forgot your One Healthcare ID? Follow the prompts to reset your One Healthcare ID and password.

Thank you,
uhceservices.com Administration Team

You are receiving this email from UnitedHealthcare because you receive a service or have a health plan with us. This mailbox is used for outbound messages only, please do not reply. When sending an email to us, do not include personal information.

This email was sent by UnitedHealthcare, 9700 Health Care Lane, Minnetonka, MN 55343 USA.

Health plan coverage provided by or through UnitedHealthcare Insurance Company or its affiliates. Administrative services provided by United HealthCare Services, Inc. or their affiliates.

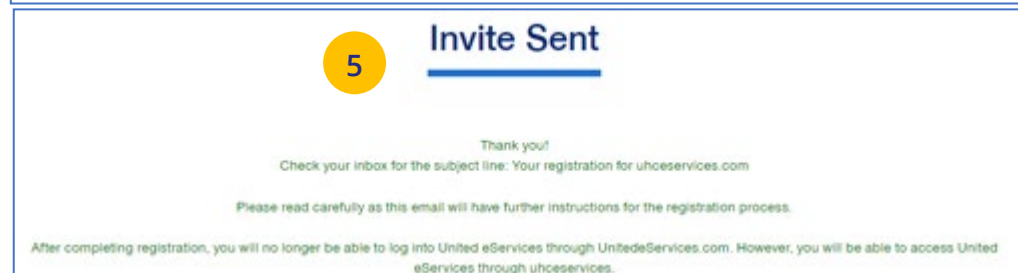
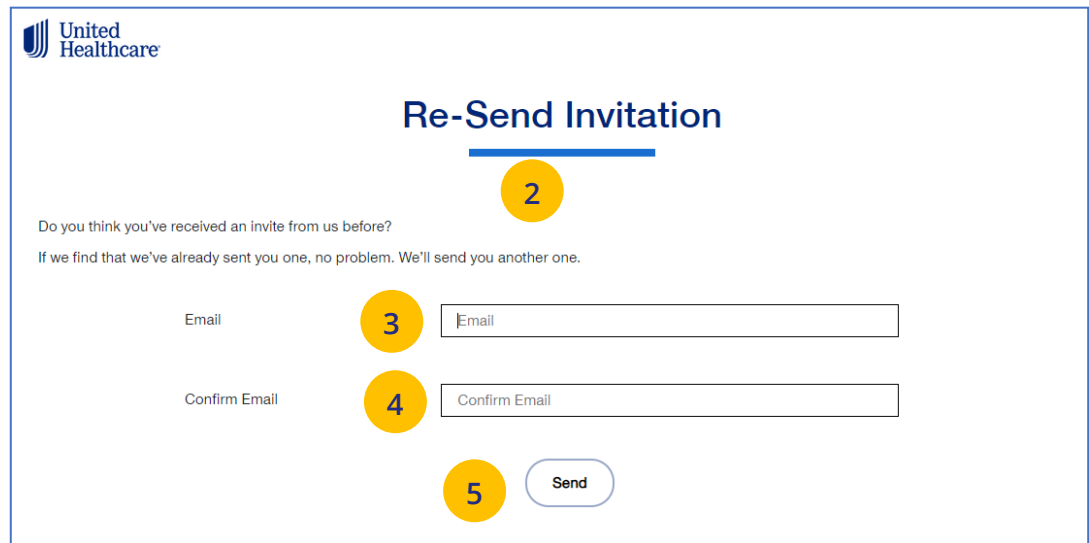
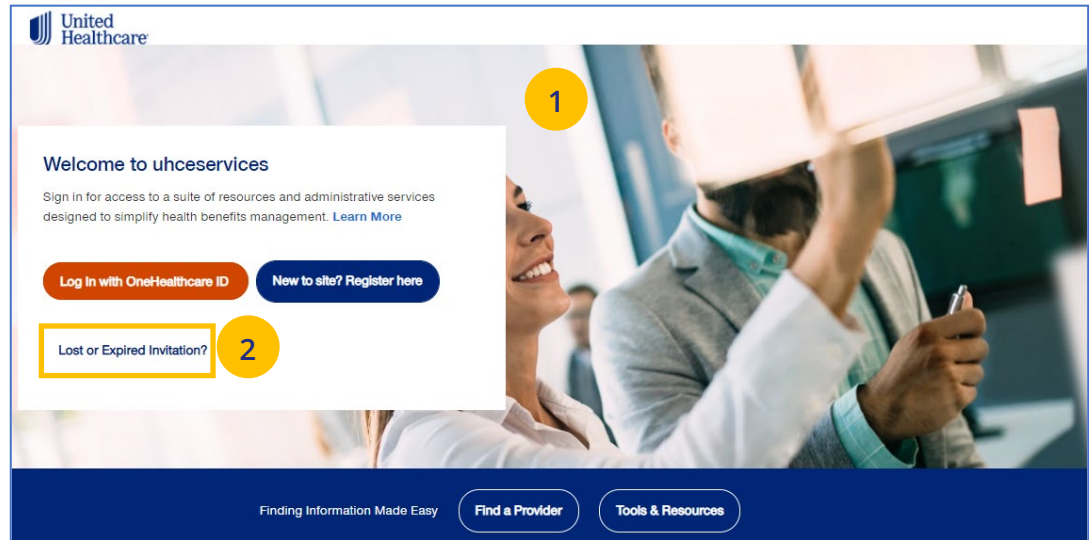


1 | Access: Lost or Expired Invitation

NOTE: If you have lost your email invitation to register or have an expired invitation, follow the steps below.

1. Go to uhceservices.com. The Log In page displays.
2. Click the **Lost or Expired Invitation?** The **Re-Send Invitation** screen displays.
3. Enter your email address in the **Email** field.
4. Enter your email address in the **Confirm Email** field.
5. Click **Send** page. You will get a message that the email invitation has been sent.

Note: If the system is unable to locate a pending invitation, you will receive a message asking you to call (866) 908-5940.



2 | Home


The **Home** page displays the following:

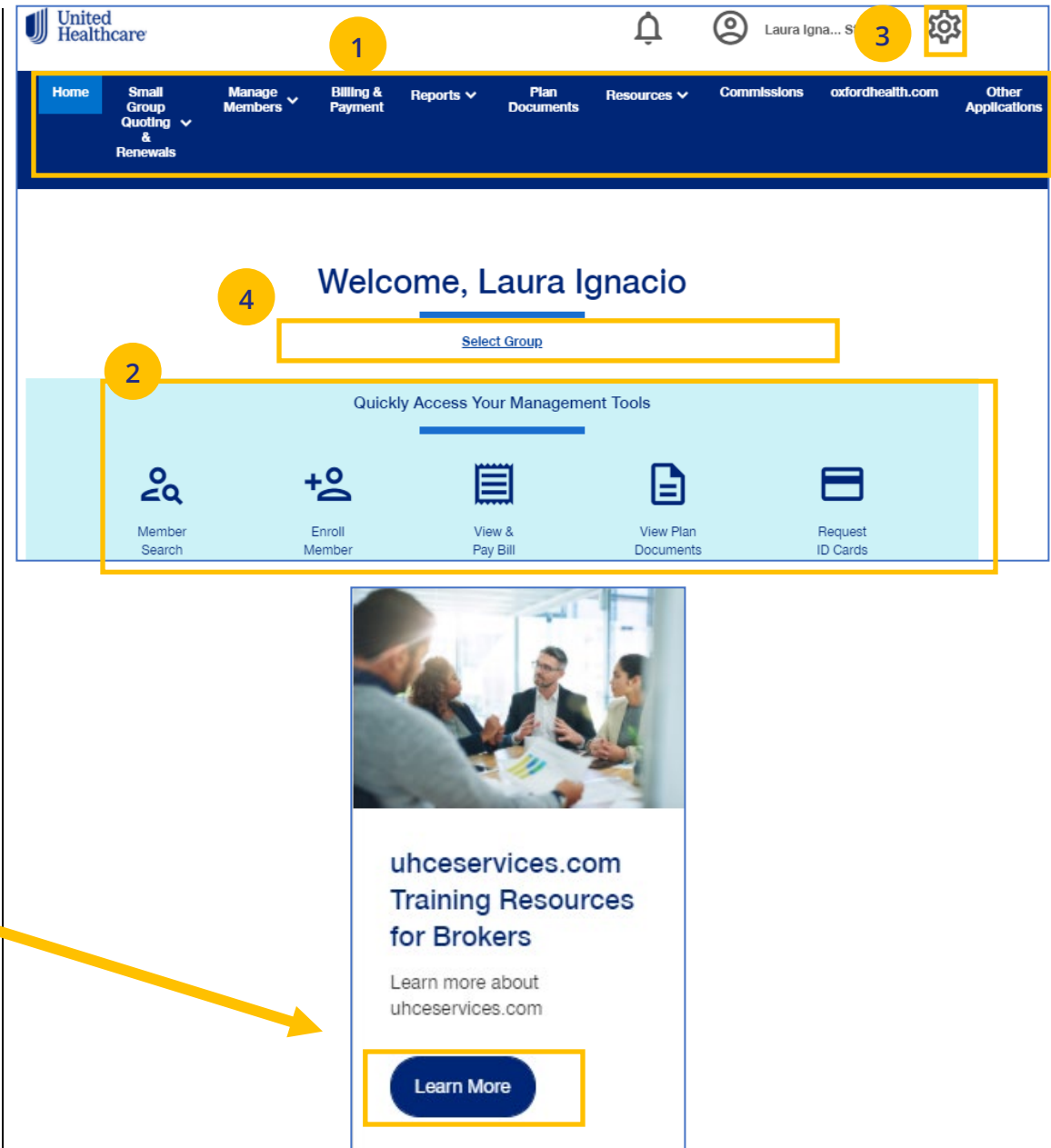
1. **Menu** items across the top of the page
2. **Quick Access links** or “shortcuts” provide easy access to the most common tasks performed
3. **Gear icon** that allows you to do the following:
 - invite others to use uhceservices.com
 - view your personal information
 - change your password
 - view messages or generated reports
 - logout

4. The **Group Selection** option is used initially to select a group. After selection, the group name and group number will be shown.

Note: PEO (Professional Employer Organization) Groups – For PEO Groups, a **Select Child Group** link will display. Click this link to select the Child Group needed.

Note: You can scroll down on the **Home Page** to access more information. Just click the **Learn More** button to view the specific information.

Note: Print Capability – You have the ability to print information throughout uhceservices.com. Click the Print icon  where displayed to print information.



The screenshot shows the United Healthcare Home page interface. Callout 1 points to the top navigation bar containing the United Healthcare logo, a notification bell, a user profile for Laura Ignacio, and a gear icon. Callout 2 points to the main navigation menu with items like Home, Small Group Quoting & Renewals, Manage Members, Billing & Payment, Reports, Plan Documents, Resources, Commissions, oxfordhealth.com, and Other Applications. Callout 3 points to the gear icon in the top right corner. Callout 4 points to the 'Welcome, Laura Ignacio' header and the 'Select Group' dropdown menu below it. Below the header is a 'Quickly Access Your Management Tools' section with five icons: Member Search, Enroll Member, View & Pay Bill, View Plan Documents, and Request ID Cards. At the bottom, there is a promotional banner for 'uhceservices.com Training Resources for Brokers' with a 'Learn More' button. A yellow arrow points from the 'Learn More' text in the notes to the 'Learn More' button in the banner.

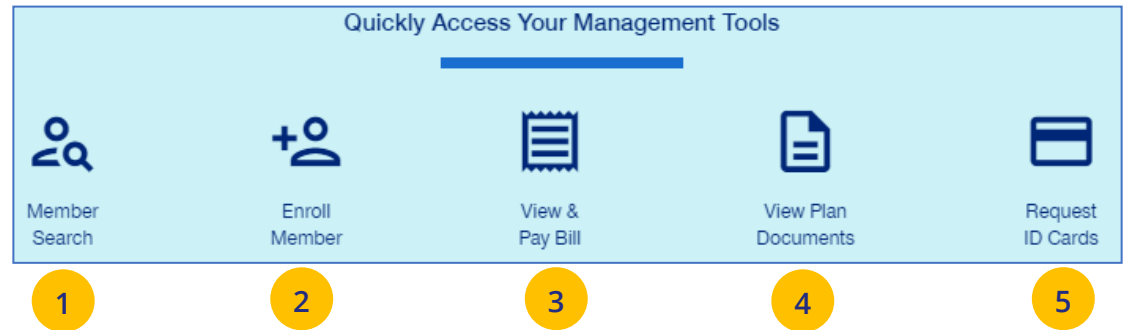


3 | Quickly Access Your Management Tools

The **Home** page contains quick access icons that offer shortcuts to the most common tasks performed on uhceservices.com.

These shortcuts most often include:

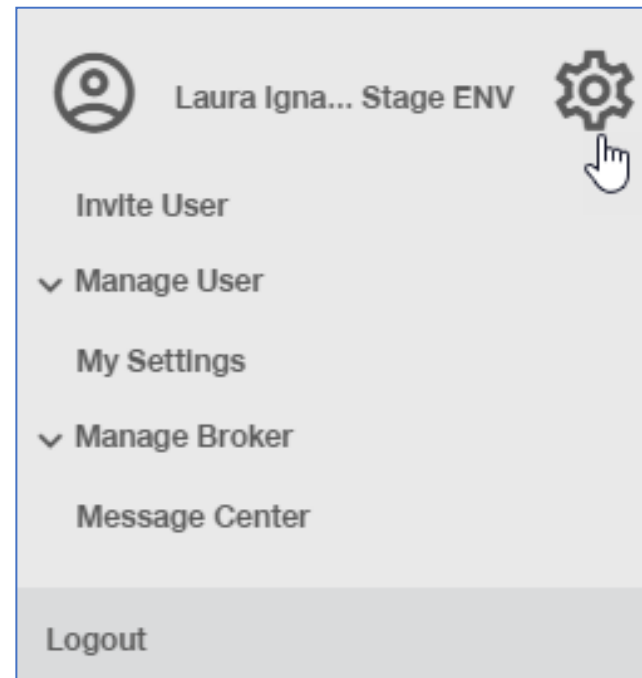
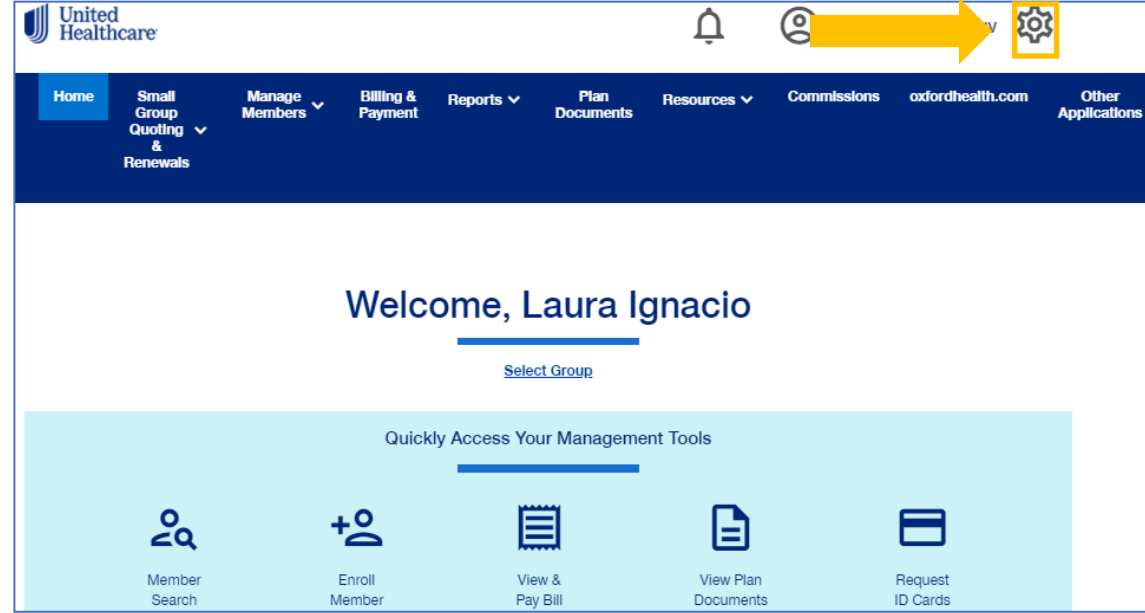
1. **Member Search** – Search for a member by Member ID or Name.
2. **Enroll Member** – Enroll new members or dependents to a group.
3. **View & Pay Bill** – Displays Billing & Payment screen.
4. **View Plan Documents** – Allows access to plan documents for a group.
5. **Request ID Cards** – Order or print new Healthcare ID cards.



4 | Gear Icon

The **gear icon**, located in the upper-right corner of the screen, is used to do the following:

1. **Invite User** – Invite someone to use uhceservices.com.
2. **Manage User** – Search for a user to view their details and permissions.
3. **My Settings** – Change password, edit your personal information, and view your “permissions” or what information you have access to.
4. **Manage Broker** – Search for a broker to view and manage information.
5. **Message Center** – Contains Important messages and is used to retrieve reports that have been generated.
6. **Logout** – Logout of the application.



4 | Invite User

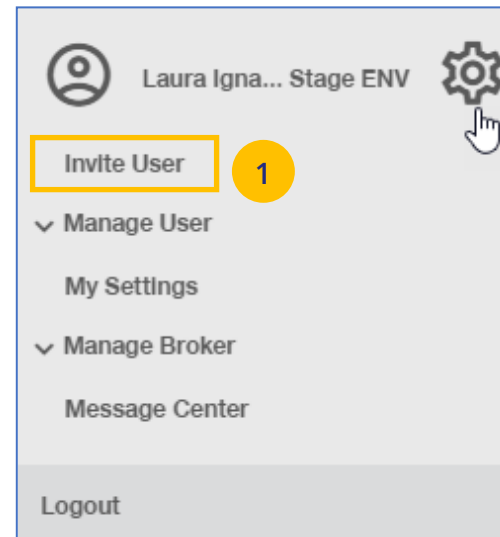
Brokers can give support staff access to uhceservices so they can perform functions on the broker's behalf. To invite a someone to use uhceservices.com:

1. Click the **Gear icon** and select **Invite User**. The **Invite a Broker User** screen displays.
2. Enter **First Name, Last Name, Email** address.
3. Select the **Role** from the **Choose a Role** dropdown.

Note: UnitedHealthcare Sales & Account Management can also invite Broker users. For an individual Broker, there can be only one Broker Admin. An Agency can have multiple Admins.

Broker and Employer Roles

Click [here](#) to go an **Appendix** at the end of this document that shows (1) **Broker roles** and permission descriptions, and (2) **Employer roles** and permission descriptions.



Invite a Broker User

Agency/Broker Name:

User Information

By adding any individual as a portal user, the Group is granting the individual access to protected group information. Each user will create a User ID and password and in doing so, certifies that they have the authority to access confidential and personal information protected by Law. Company agrees to indemnify UnitedHealthcare Insurance Company and its affiliated companies from any and all liability and loss, expenses (including reasonable attorney's fees), and claims for damages or injury arising from any Incident or Breach (as defined by HIPAA) that is associated with the identified users. This indemnification includes any claim relating to the validity or eligibility information provided.

First Name *

Last Name *

Email *

Role *

Broker User Type

User Type identifies the Principals/Owners associated to this Broker/Agency. By selecting the Broker User Type of Administrator, you are assigning this user as the Principal/Owner.

Administrator Delegate



4 | Invite User (continued)

4. Indicate whether the invitee is an **Administrator** or a **Delegate** within United eServices. Only the agency/principal owner should be an Administrator. All other agency employees should be a delegate.
5. Click **Create**. A message indicates that your invitation has been successful.

Invite a Broker User

Agency/Broker Name:

User Information

By adding any individual as a portal user, the Group is granting the individual access to protected group information. Each user will create a User ID and password and in doing so, certifies that they have the authority to access confidential and personal information protected by Law. Company agrees to indemnify UnitedHealthcare Insurance Company and its affiliated companies from any and all liability and loss, expenses (including reasonable attorney's fees), and claims for damages or injury arising from any Incident or Breach (as defined by HIPAA) that is associated with the identified users. This indemnification includes any claim relating to the validity or eligibility information provided.

First Name *

Last Name *

Email *

Role * **Compare Roles**

Broker User Type

User Type identifies the Principals/Owners associated to this Broker/Agency. By selecting the Broker User Type of Administrator, you are assigning this user as the Principal/Owner.

Administrator Delegate

4 **5**

Cancel **Create**

5


Invite a Broker User

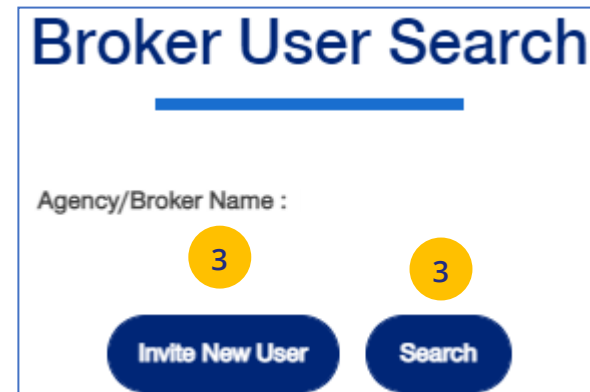
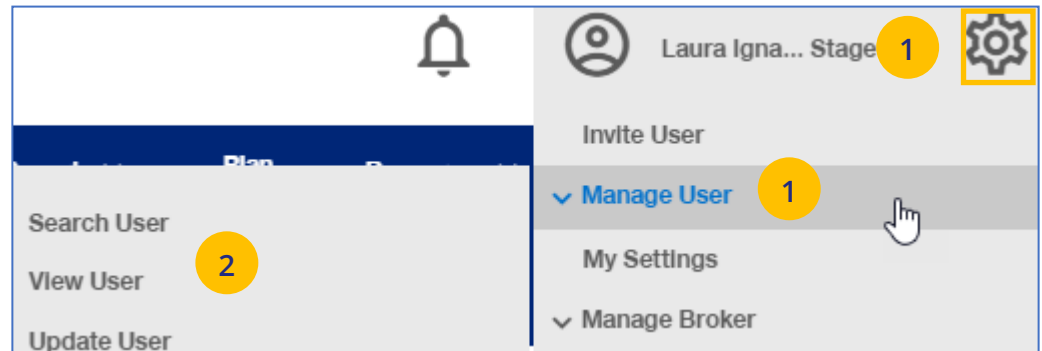
User Louis Johnson successfully invited as Agency/Broker User



4 | Manage User


To search for and select a specific user to view or update user information, follow the steps below:

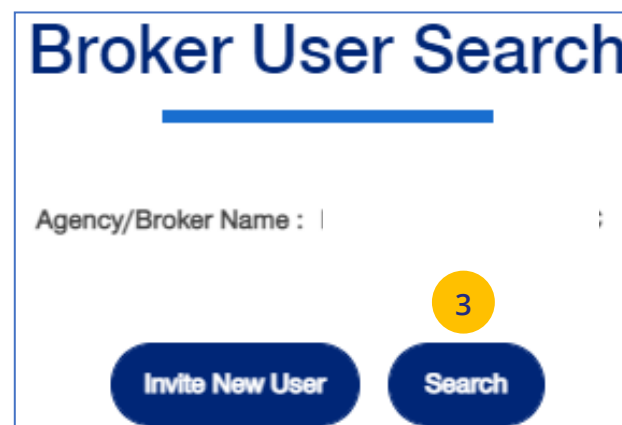
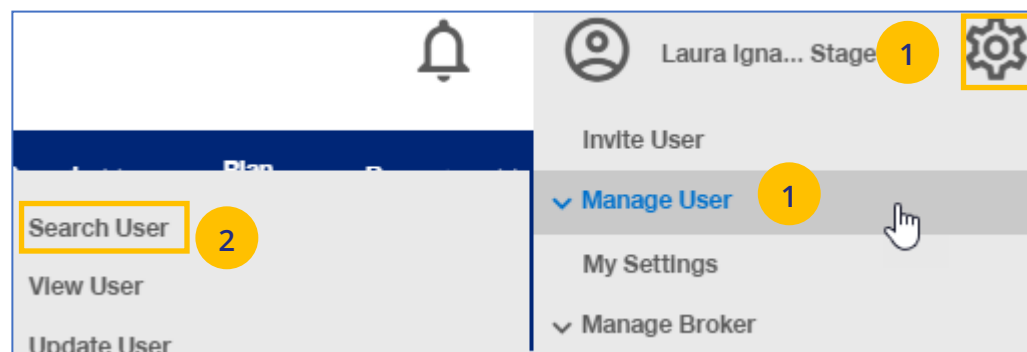
1. Click the **gear icon**  and select **Manage User**. You will have three options:
 - **Search User** – You can search for a user or invite a new user (if you have that capability)
 - **View User** – You can search for a user or invite a new user (if you have that capability)
 - **Update User** – You can search for a user or invite a new user (if you have that capability)
2. Select one of the options to display the **Broker User Search** screen.
3. You have two options:
 - Click **Search**. The search results will display with the list of users.
 - Click **Invite New User**. The **Invite a Broker User** screen displays. Complete the information and click **Create**.



4 | Re-Invite a User

To re-invite a specific user to view or update user information, follow the steps below:

1. Click the **gear icon**  and select **Manage User**.
2. Select **Search User**.
3. Click the **Search** button.



4 | Re-Invite a User (continued)

To re-invite a specific user to view or update user information, follow the steps below:

4. In the **Filter by** area, click the plus sign to expand the filter fields. Search for the user you need using the filter fields
5. Click on **Re-Invite**. A message displays indicating the “re-invite” was successful. The user will receive a new invitation email.

Filter by

4

Select Deactivation Date Range
Select the date range

Optum ID

First Name

Last Name

User Email

Select Status

Select Role

Clear Filter

Piatt, Anglette (Enabled)					Select User
One Healthcare ID	User Email	Role	Last Login	Deactivation	
apiatt3	anglette_d_piatt...	Standard Broker with Commissions	04/07/2020	05/07/2021	

Piatt, Anglette (Invited)					Select User
One Healthcare ID	User Email	Role	Last Login	Deactivation	Re-Invite
	anglette_d_piatt...	Standard Broker with Commissions	N/A	N/A	

Stage ENV ..., Laura Igna... (Enabled)					Select User
One Healthcare ID	User Email	Role	Last Login	Deactivation	
lignacio3	laura_l_ignacio@...	Broker Lead with User Maintenance	06/01/2021	N/A	

Dylan, Louis (Invited)					Select User
One Healthcare ID	User Email	Role	Last Login	Deactivation	Re-Invite
	ldylan@compny.or...	Standard Broker with Commissions	N/A	N/A	

5

User Louis Dylan successfully re-invited as Standard Broker with Commissions.



4 | My Settings

The **My Settings** page can be used to do the following:


- **Change Password**
- **Manage My Profile** – Manage your One Healthcare ID. **See more information on the next page.**
- **Personal Information** – View details or edit personal information.
- **My Associations** – Broker associations and specific permissions.
- **Platforms/Tools**
- **Contact Information** – Broker Contact information is shown with ability to edit (update).
- **Addresses** – Shows mailing addresses and telephone numbers.

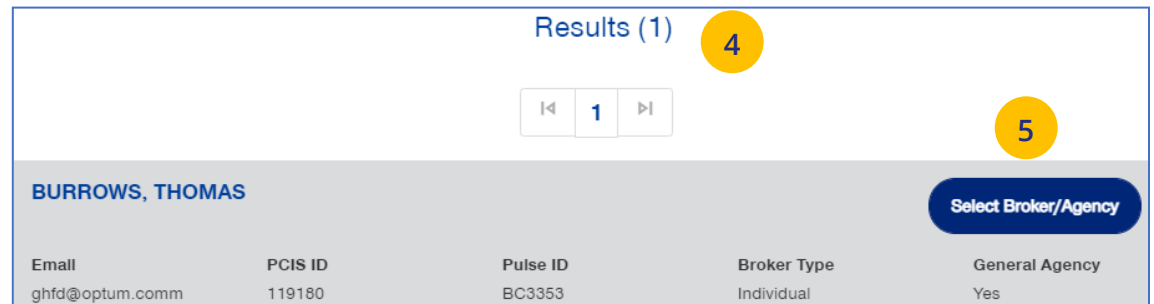
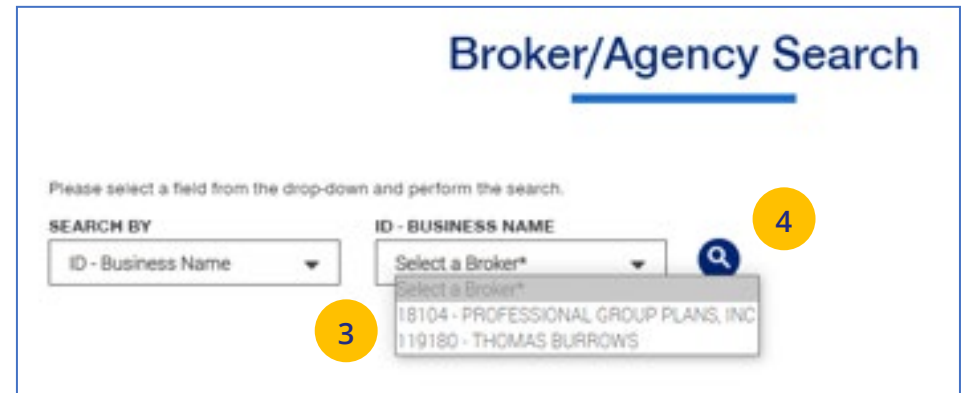
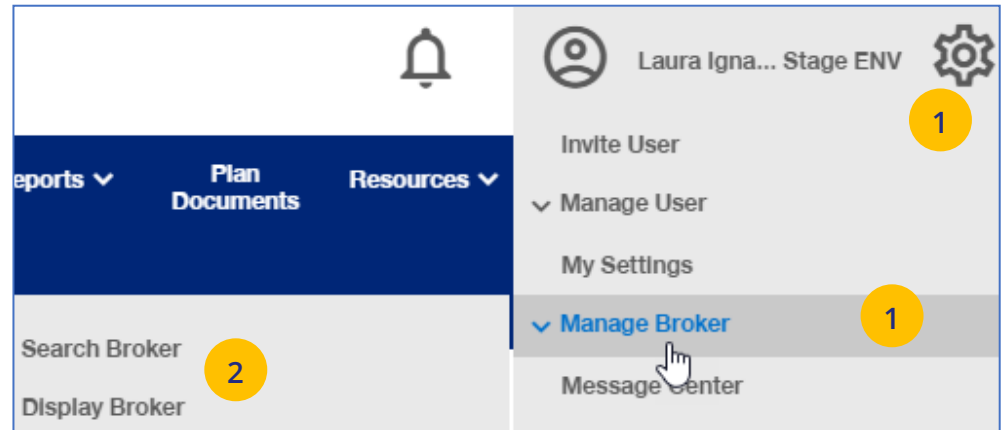
The screenshot displays the user interface for the 'My Settings' page. At the top, a user profile header shows the name 'Laura Igna... Stage ENV' and a settings gear icon. Below this, there are options to 'Invite User' and 'Manage User'. The 'My Settings' option is highlighted with a yellow border. The main content area is titled 'My Settings' and features two primary action buttons: 'Change Password' and 'Manage My Profile'. A notification states, 'Your changes will be reflected after re-login.' The 'Personal Information' section lists fields for 'First Name', 'Last Name', 'Email', and 'One Healthcare ID', accompanied by an 'Edit' button. The 'My Associations' section shows a 'Broker Role: Admin' and a list of permissions: 'Billing & Payment' and 'Commissions', each with a plus sign to expand.



4 | Manage Broker

To search for a Broker, follow the steps below:

1. Click the **gear icon**  and select **Manage Broker**.
2. Select either **Search Broker** or **Display Broker**. The Broker/Agency Search screen displays.
3. Select the broker from the dropdown.
4. Click the **Search** icon. The search results will be shown. Scroll down to see all the results.
5. Click **Select Broker/Agency** for the broker information you need. The **View Broker/Agency** screen displays with information on the broker.



4 | Manage Broker (continued)

Note: When you view detailed information for a specific Broker, information will be shown in the following sections:

- **Broker/Agency Information** – Shows details on the broker
- **Contact Information** – Broker Contact information is shown with ability to edit (update). **See more information on the next page.**
- **Appointment Information** – Shows list of appointments.
- **Associated Groups** – Shows groups associated with the broker.
- **Associated Users** – Shows users associated with the broker.

View Broker/Agency	
Broker/Agency Information ✕	
First Name	THOMAS
Last Name	
Email	ghfd@optum.comm
PCIS ID	119180
Pulse ID	BC3353
General Agent Indicator	Yes
Broker Type	Individual
Contact Information +	
Appointment Information +	
Associated Groups +	
Associated Users +	



4 | Manage My Profile

To manage your One Healthcare IDs or to move Associations, follow the steps below:

Note: Click [here](#) for FAQs related to this topic.

1. Click the **Manage My Profile** button.
2. You have the option to move associations from another ID to your logged-in ID, or to another ID from your this logged-in ID. Select the button that indicates what you want to do and click **Next**.

My Settings

Your changes will be reflected after re-login.

Personal Information Edit

First Name	Hina
Last Name	Hinaemp
Email	chintakayala_bhavan1@optum.com
Optum ID:	Hinaemp

Manage My Profile

1 Direction 2 Selection 3 Review & Submit

What would you like to do with your One Healthcare ID - Hinaemp FAQs

Move my associations from another One Healthcare ID into this One Healthcare ID

Move my associations to another One Healthcare ID

Cancel Next



4 | Manage My Profile (continued)

3. **Move Associations:** Choose one or more existing IDs that match their name and email, **or** manually enter the ID/password for another ID.
4. **Move Associations:** This page shows the list of associations under the ID chosen on the previous page. User will submit and get the success message.
5. Click **Next**.

Manage My Profile

✓ Direction 2 Selection 3 Review & Submit

What would you like to do with your One Healthcare ID - Hinaemp [FAQs](#)

Move my associations from One Healthcare ID(s) that match my name/email

One Healthcare ID All

Hinaemp2
Hinaemp3
Hinaemp10
Hinaemp123
Hinaemp8
Hinaemp9
Hinaemp6
Hinaemp7
Hinaemp4

Or

Move my associations from another One Healthcare ID I own

One Healthcare ID:

Password:

Cancel Previous Next



4 | Manage My Profile (continued)

6. Click **Submit**. A success message displays.
7. Click the **Log off** button and log back in.

✓ Direction ✓ Selection 3 Review & Submit

Please confirm you wish to move the following associations to your One Healthcare ID - Hinaemp [FAQs](#)

Hinaemp2

THE OAKES AGENCY INC - 81458

6

Cancel Previous **Submit**

Manage My Profile

✓ Direction ✓ Selection ✓ Review & Submit

6 Your move was successful. Please log off and log back in.

7 **Log off**



4 | Roles and Permissions (My Associations)

You can use **My Settings** to view your specific roles and permissions and to view what information you have access to in uhceservices.

1. Under **My Settings**, scroll down to the **My Associations** section. You will see your specific **Broker Role** (Admin or Delegate) and your **User Role**.
2. Scroll down to **Permissions** to view all the tasks you can perform in uhceservices.
 - o Click the plus sign **+** to expand the category to view specific permissions within that category.

Note: Requesting Change to User Role (Permissions): If you need to perform a task or tasks that you do not have permission to perform, work with your Agency Administrator or call 1-866-764-7736.

My Associations 1

RAND INSURANCE INC ✕

Broker Role: Admin

User Role: Broker Lead with User Maintenance

Permissions: 2

Billing & Payment +

Commissions +

Member Management ✕

- Add Member
- Request ID card
- Term Member
- Update Member
- View Eligibility
- View Member

Quoting & Renewals ✕

- Quoting
- Renewal
- Renewal Package

Reports ✕

- Banking Reports
- Delinquent Employer Accounts
- Level Funded Reporting



4 | View and Update Broker Contact Information

To update broker contact information, follow the steps below:

1. Click the **Edit** button in the **Contact Information** section to display the Contact Information screens.
2. In the **Go Green** field:
 - Click **Yes** if you want the renewals you are updating for the broker accessible in online form only (paper renewals will no longer be sent).
Note: Only a **Broker Admin** can update the **Go Green** indicator.
 - Click **No** if you want the information in paper form.
3. Enter information in any of the fields with the boxes.
4. Click **Save**. The following message will be shown: **“Updates have been submitted successfully. Your changes may not be reflected immediately.”**

Contact Information

Edit

Contact Information

Please note that this contact information will apply to the Broker ID and all associated users.

Go Green Yes No

Business Email LYOUNG@RANDINSURANCE.COM

Business Phone (203) 637-1006

Business Phone Ext 6691

Business Fax (203) 637-9671


C/O C/O

Save Cancel

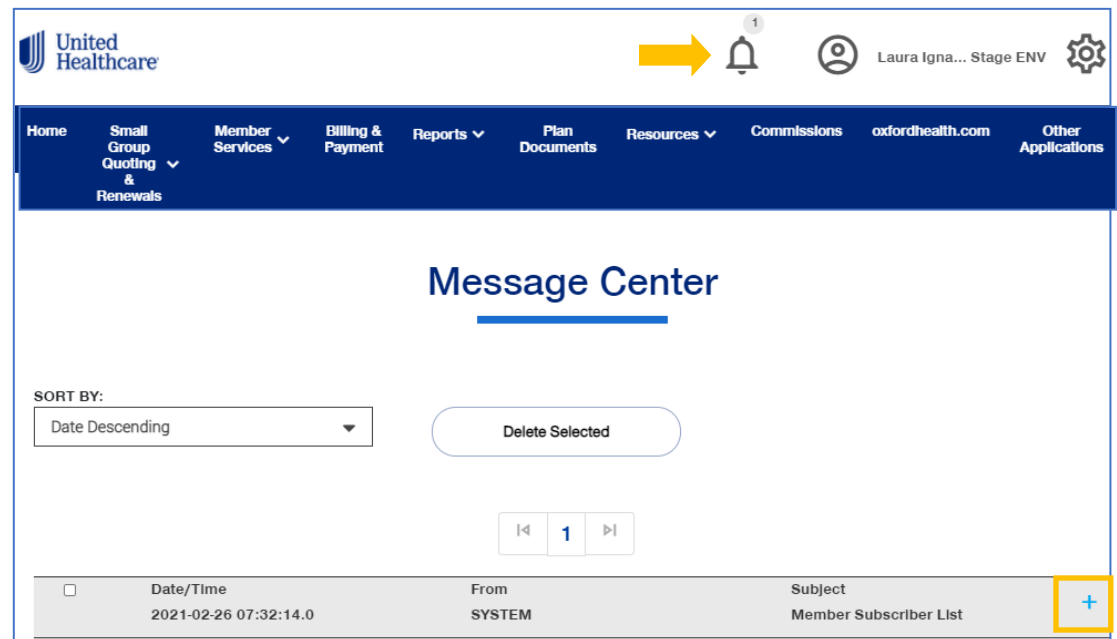
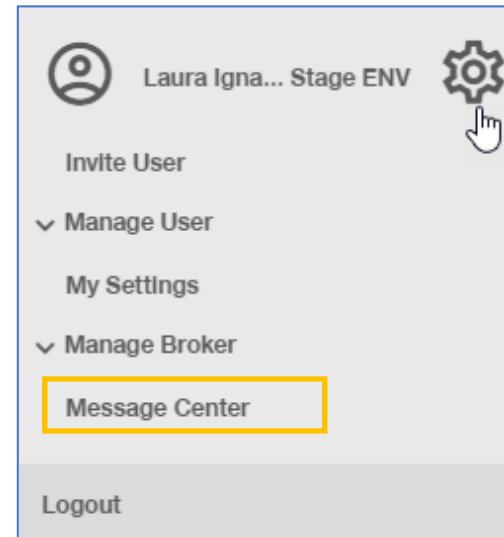


4 | Message Center

The **Message Center** displays messages and links to reports that have been generated.


The bell icon  at the top of the screen indicates the number of new messages or reports you have in the Message Center.

Note: To open a message in the Message Center, click the Plus sign and click the link to the report or message.



5 | Group Selection

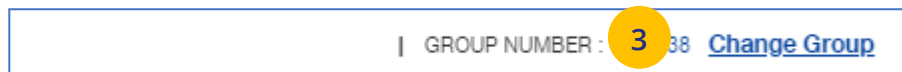
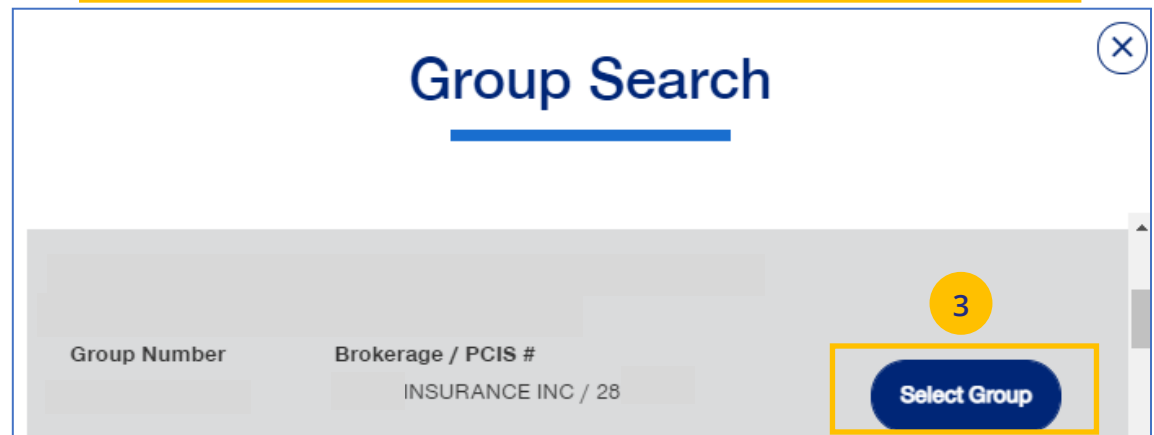
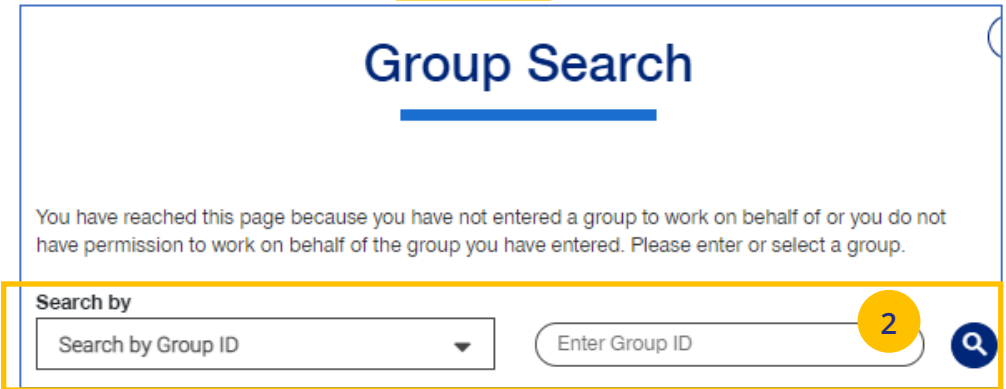
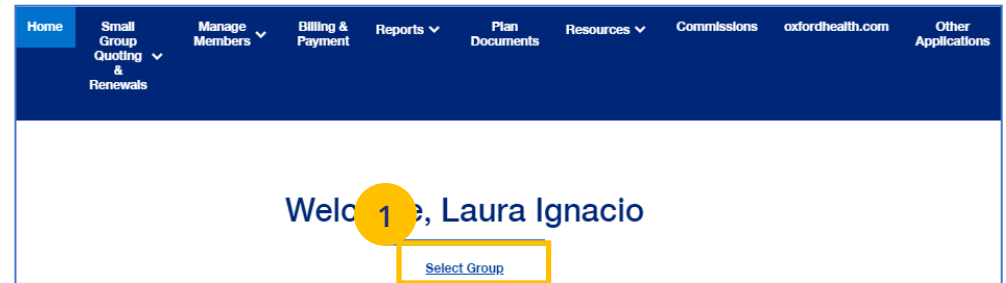
To select a group from the Home page:

1. Click the **Select Group** link. The **Group Search** screen displays.
2. Enter the **Group ID** number and click the **Search** icon . The **Search Results** display.
3. Click **Select Group**. The group will show as your default group on the Home page.
Note: You can click the **Last Viewed** box to view the five most recent groups that you have displayed. The current group you searched for will be at the top.

NOTE: Change Group – Once a group number is selected, it will remain on the Home page until you change it. To change to a different group, click the Change Group link. Repeat steps 2 and 3 above to select your new group. (UnitedHealthcare employees have access to all groups).

NOTE: PEO (Professional Employer Organization) Groups – For PEO Groups, a **Select Child Group** link will display. Click this link to select the Child Group needed. **See step-by-step procedures on the following page.**

NOTE: Level Funding Groups – If the group you are searching for is on the **All Savers** platform, there will be a link to view the group on myallsavers.com.



5 | Group Selection: PEO Groups

For PEO (Professional Employer Organization) groups, a **Select Child Group** link will display after you have selected the **Parent Group**. Follow the steps below to display **Child Group** information.

Note: PEO Groups do not apply to **UnitedHealthcare HMO**.

1. When you select a **PEO Group**, the **Select Child Group** link displays under the **Parent Group** name and number. Click **Select Child Group**. The **Child Group Names** and **Group Numbers** will be shown.

Note: A Parent Group can have one or more Child Groups.

2. Find the **Child Group** you need and click **Select Group**. The Parent Group and **Child Group** information will both show as your default Groups on the home page.

Note: You can click **Change Child Group** and select another child group if more than one are available. To display another group, you must click **Change Group** instead of **Change Child Group**.

PEO_ADP_PARENT4 | GROUP NUMBER : 3000777 [Change Group](#)
[Select Child Group](#) 1

ADP_PEO_3000777_CHILD2 1
Group Number 3001066 2 [Select Group](#)

ADP_PEO_3000777_CHILD1
Group Number 3000992 [Select Group](#)

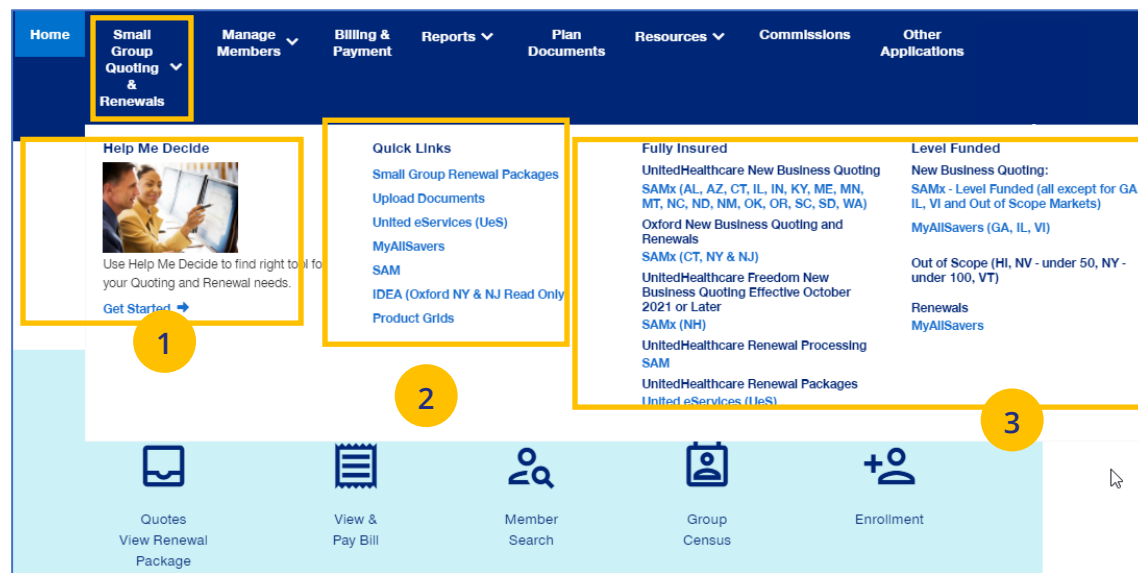
PEO_ADP_PARENT4 | GROUP NUMBER : 3000777 [Change Group](#) 2
ADP_PEO_3000777_CHILD2 | GROUP NUMBER : 3001066 [Change Child Group](#)



6 | Small Group Quoting & Renewals

The **Small Group Quoting & Renewals** tab will direct you to the correct quoting/enrolling and renewal tool, depending on funding, market, etc. Other common tools are provided under Quick Links.

1. **Help Me Decide** allows you to answer questions that will help you select the right tool for your Quote or Renewal.
2. **Quick Links** provides access to the following:
 - Small Group Renewal Packages
 - Upload Documents
 - United eServices (UeS)
 - MyAllSavers
 - SAM (Oxford CT Read Only)
 - IDEA (Oxford NY & NJ Read Only)
 - Product Grids
3. **Small Group Quoting and Renewal** provides links to quoting and enrolling (for Fully Insured and Level Funded) in the following applications:
 - SAMx
 - SAM
 - MyAllSavers



6 | Help Me Decide

The **Help Me Decide** link allows you to answer questions that will help you select the right tool for your Quote or Renewal.

To do this, follow the steps below.

1. Click the **Small Group Quoting & Renewals** tab. The **Small Group Quoting & Renewal** screen displays.
2. Under **Help Me Decide**, click **Get Started**. The **Help Me Decide** screen displays.

The screenshot shows the top navigation bar of the Oxford Health website. The 'Small Group Quoting & Renewals' tab is highlighted with a yellow box and a yellow circle containing the number '1'. Below the navigation bar, the 'Help Me Decide' section is visible, featuring a 'Get Started' button with a right-pointing arrow, highlighted with a yellow box and a yellow circle containing the number '2'. To the right of the 'Help Me Decide' section, there are 'Quick Links' and a list of products categorized under 'Fully Insured (FI)' and 'Level Funded (LF)'. The 'Quick Links' include: Small Group Renewal Packages, Upload Documents, United eServices (UeS), MyAllSavers, SAM, IDEA (Oxford NY & NJ Read Only), and Product Grids. The 'Fully Insured (FI)' products include: UnitedHealthcare New Business Quoting SAMx (AL, AZ, CT, IL, IN, KY, ME, MN, MT, NC, ND, NH, NM, OK, OR, SC, SD, WA), Oxford New Business Quoting and Renewals SAMx (CT, NY & NJ), UnitedHealthcare Freedom New Business Quoting Effective October 2021 or Later SAMx (NH), UnitedHealthcare Renewal Processing SAM, UnitedHealthcare Renewal Packages, and United eServices (UeS). The 'Level Funded (LF)' products include: New Business Quoting: SAMx - Level Funded (all except for GA and Out of Scope Markets), MyAllSavers (GA), Out of Scope (HI, NV - under 50, NY - under 100, VT), Renewals, and MyAllSavers.



6 | Help Me Decide (continued)

3. Enter the information to narrow your options. Required fields are indicated by an asterisk.

Note: The **Products** listed will change depending whether you select **Create the New Business Quote** or **Process a Renewal**.

4. Click **Update Results**. The **Results** screen displays with a link to the request that fit the criteria you entered.

Help Me Decide

Please enter the required fields below. The Results section below will help you select the right option for your Quote or Renewal.

**Required Fields*

I'm looking to...*

Create a New Business Quote

Process a Renewal

Select the effective date:*

June Select One 2021

Select the funding type:*

[Contact Us](#) for support around Self-Funded needs.

Fully Insured

Level Funded

Primary Location ZIP Code:*

Enter Zipcode

Select Products:*

Medical - Oxford

Medical - UnitedHealthcare

Dental

Vision

Basic Life

Supplemental Life

Dependent Life

Short Term Disability (STD)

Long Term Disability (LTD)

Update Results



6 | Help Me Decide (continued)

5. Click the link to go to the application to complete your task.



Results

Product: **Medical - UnitedHealthcare**

[Create a Medical - UnitedHealthcare Quote](#)

5



6 | Quick Links: Small Group Renewal Packages

The **Small Group Renewal Packages** link is used to view the renewal documents for groups or brokers.

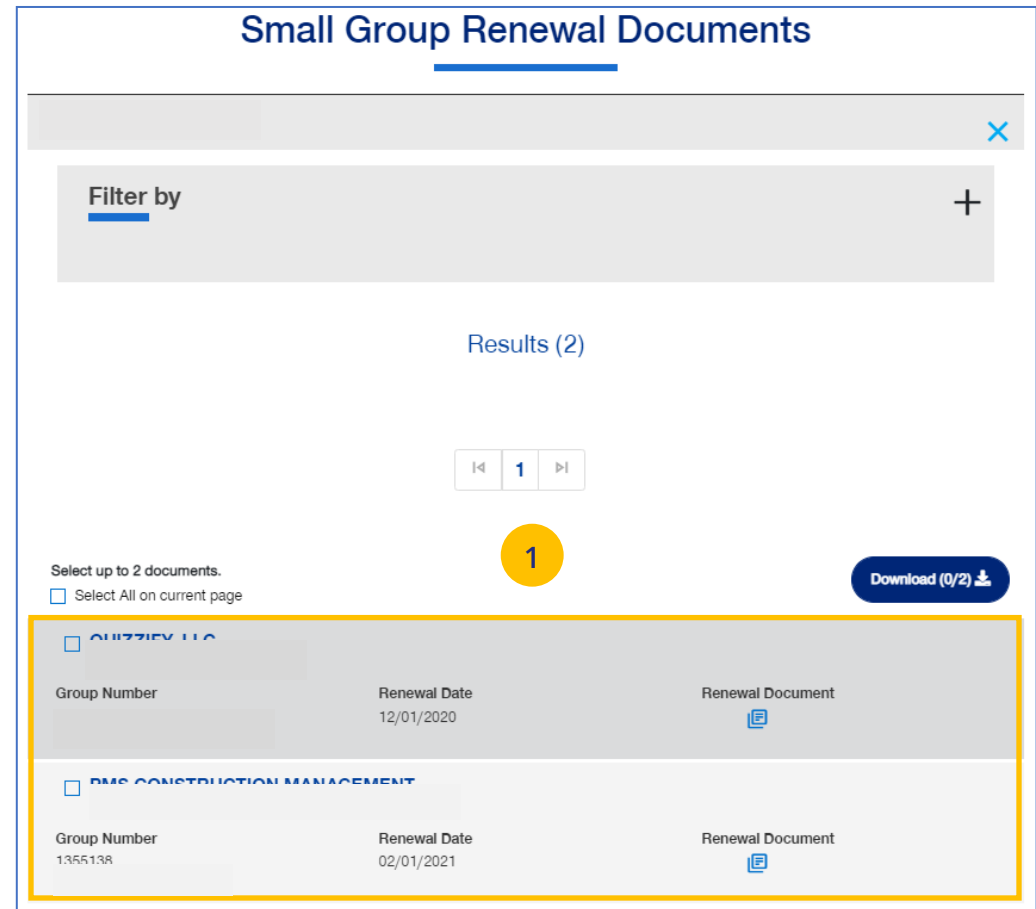
1. Click **Small Group Renewal Packages**. The **Small Group Renewal Documents** screen displays with the groups listed. You can scroll down to view all the groups.

Note: General Agents will see groups eligible for renewal 75 days before the group's renewal date. Non-General Agent brokers will see groups eligible for renewal 72 days before the group's renewal date. Employers will see groups eligible for renewal 60 days before the group's renewal date.



Quick Links

- Small Group Renewal Packages**
- Upload Documents
- United eServices (UeS)
- MyAllSavers
- SAM (Oxford CT Read Only)
- IDEA (Oxford NY & NJ Read Only)



Small Group Renewal Documents

Filter by +

Results (2)

1

Select up to 2 documents.
 Select All on current page

Download (0/2)

<input type="checkbox"/>	QUIZLEY LLC			
	Group Number	Renewal Date	Renewal Document	
		12/01/2020		
<input type="checkbox"/>	DMS CONSTRUCTION MANAGEMENT			
	Group Number	Renewal Date	Renewal Document	
	1355138	02/01/2021		



6 | Quick Links: Small Group Renewal Packages (continued)

Note: Multiple Packages – When you search by **Broker ID**, multiple packages can return. Place a checkmark in the boxes for the renewal documents you need to view. You can also put a checkmark in the “Select” box at the top of the window to view all the renewal documents shown on the page. There is a limit of 20 groups per page. You must upload the groups listed on one page at a time.

Note: Filter Results - You can also “filter” the results to narrow the groups you have listed. Using filters is recommended for agencies with many renewals. Click on the Plus sign in the Filter by area. You can filter by **Group Name**, **Group ID**, **Renewal Date** or **Writing Agent**.

The screenshot shows a web interface for selecting renewal documents. At the top, there is a header with the text "Select up to 20 documents." and a "Download (0/20)" button. Below this is a "Select All on current page" checkbox. The main content area displays two rows of renewal documents. The first row is for "1051 MORRIS PARK PIZZA CORP" with a "Manage Renewal" link. The second row is for "133 DRUG CORP" with a "Manage Renewal" link. Below the document list is a "Filter by" section with a plus sign icon. A yellow arrow points from the text "Place a checkmark in the boxes for the renewal documents you need to view" to the checkboxes next to the document names. Another yellow arrow points from the text "Click on the Plus sign in the Filter by area" to the plus sign icon. A third yellow arrow points from the text "You can filter by Group Name, Group ID, Renewal Date or Writing Agent" to the filter options in the expanded filter menu.

Select up to 20 documents.

Select All on current page

1051 MORRIS PARK PIZZA CORP [Manage Renewal](#)

Group Number	Renewal Date	Renewal Document
	05/01/2021	

133 DRUG CORP [Manage Renewal](#)

Group Number	Renewal Date	Renewal Document
	05/01/2021	

Filter by +

Filter by ×

Filtering will reset any selections listed below

Group Name	<input type="text" value="Group Name"/>
Group ID	<input type="text" value="Group ID"/>
Renewal Date	<input type="text" value="Select Date"/>
Writing Agent	<input type="text" value="Select Writing Agent"/>

Clear Filter



6 | Quick Links: Small Group Renewal Packages (continued)

- You can click on the **Renewal Document** link to display the document **or** click the **Manage Renewals** link. When you click the **Manage Renewals** link, you will be directed to SAMx.

Note: You will not find the renewal package in SAMx. You will find information on the renewal and you can also run a new quote in SAMx.

Group Number	Renewal Date	Renewal Document
[Redacted]	05/01/2021	Renewal Document
[Redacted]	05/01/2021	Manage Renewal

Welcome to Sales Automation Management (SAMx)

The SAMx experience leverages updated technology and incorporates your insights and feedback to help us work together better.

You can expect:

- Flexibility to allow you to work the way you work best
- Dependable and consistent experience to quote, enroll and renew your business
- Side-by-side offerings of Medical and Dental and Vision plans

Get started by choosing one of the following action buttons.

- Generate Full Quote with Detailed Census
- Generate Quick Quote
- New Business Dashboard
- Renewal Dashboard



6 | Quick Links: Upload Documents

The **Upload Documents** tab allows you to select and upload a specific document. **This only applies if you have permission to upload documents.**

Note: **Upload Documents** is not applicable to **UnitedHealthcare HMO.**

Note: Access to **Upload Documents** is available only to users with the following roles:

- Internal Portal Admin
- Internal Risk Management
- Internal SAMx Admin
- Internal Service
- Internal Underwriting
- Internal Sales
- Employer Lead
- Employer User
- Broker Lead with User Maintenance
- Standard Broker without Commissions
- Broker View Only
- Standard Broker with Commissions

Note: If you have not entered a Group Number previously, you will be asked to search for and find your Group prior to selecting the document to upload.

1. Click the **Upload Documents** link. The **Upload Documents** screen displays.

Quick Links

Small Group Renewal Packages

Upload Documents 1

1 **Upload Documents**

GROUP NUMBER: [Change Group](#)

Please select a document name and browse your computer for your file. You may upload five documents at a time.

Document Name * Select Document for Upload *

[Add Row](#) (+)

[Clear Selections](#) [Upload](#)

To check your verification click [here](#) ↗

If you have recently submitted information, please allow up to 5 business days for us to process your information and update your status.



6 | Quick Links: Upload Documents (continued)

2. Use the **Document Name** drop-down to select the document you need to upload.
3. Click the **Select Document for Upload** box and attach the document for upload. Repeat this if needed by clicking **Add Row**. You can upload up to five documents at one time.
4. Click **Upload**. A “successfully uploaded” confirmation message will display.

The screenshot illustrates the document upload process in three stages:

- Row 1:** A dropdown menu for "Document Name" is open, showing a list of document types. "Employer Information Form" is highlighted. A yellow circle with the number "2" is placed over the dropdown.
- Row 2:** The "Document Name" dropdown is set to "1099 Attestation Form". The "Select Document for Upload" field contains a file named "Decision 2.jpg". A yellow circle with the number "3" is placed over the file selection area. An "Add Row" button is visible at the bottom right.
- Row 3:** The "Document Name" dropdown is set to "1099 Attestation Form". The "Select Document for Upload" field contains "Decision 2.jpg". A yellow circle with the number "4" is placed over the "Upload" button. Below the "Upload" button, a confirmation message reads: "Document **Decision 2.jpg** successfully uploaded as 1099 ATTESTATION FORM. Document ID: **0902b2da80189d0c**".



6 | Quick Links: United eServices (UeS)

When you click the **United eServices (UeS)** link, you will be taken to the **United eServices** home page.

Note: First Time Access to UeS for Brokers:

- **If you are not registered with United eServices**, click the **Continue** button in the **I Do Not Have a United eServices Account** box. You will then be directed to the home page. After your first access, you will go to the SAM automatically.
- **If you already have a UeS Username and Password**, enter information in the **I Have a United eServices Account** box. Click **Submit**.

Quick Links

[Small Group Renewal Packages](#)

[Upload Documents](#)

[United eServices \(UeS\)](#)

[MyAllSavers](#)

[SAM \(Oxford CT Read Only\)](#)

[IDEA \(Oxford NY & NJ Read Only\)](#)



6 | Quick Links: United eServices (UeS) (continued)

Note: Manage My UeS ID – If your UeS account is associated to more than one account, a pop-up screen displays asking you to select the account you want to use. Select the account you need or select All. Then click **Submit**.

Manage My UeS ID

Your account is associated to more than one UeS Account. Please select the account you would like to use from the below list:

jeetp3
 jeetp9

Submit

We identified new association(s) that are not yet established in UeS. Please select any associations from the list below to have them associated to the UeS account selected above.

All

119180 business_name

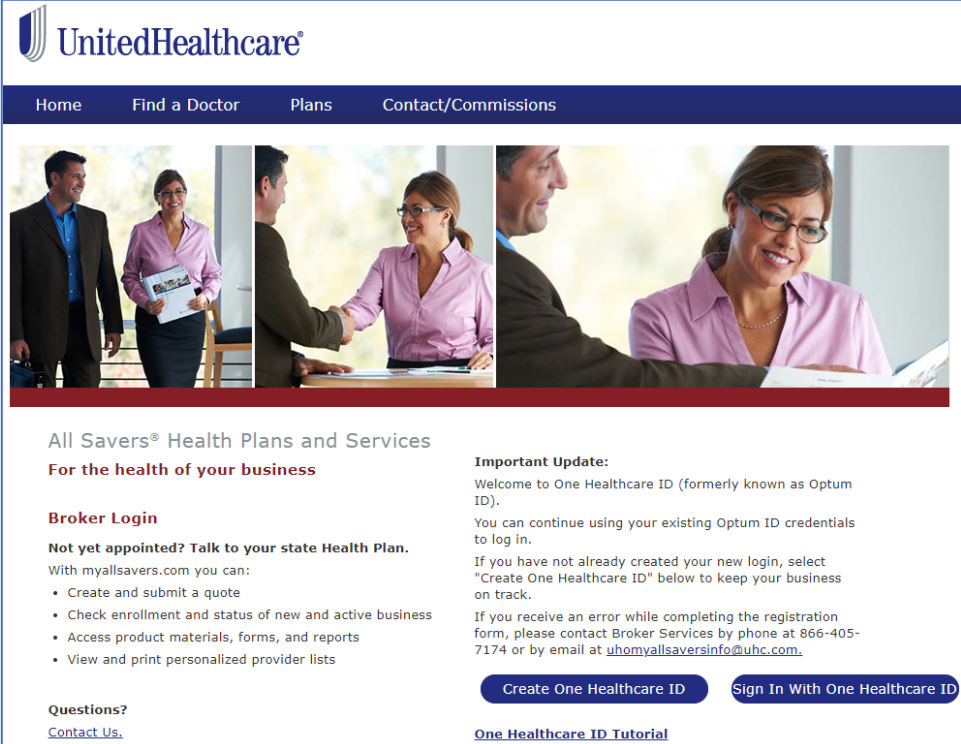


6 | Quick Links: MyAllSavers (Level Funded)

When you click the **MyAllSavers** link, the **All Savers Health Plans and Services** page displays. This is used for all who have Level Funded groups on All Savers.

Note: First Time Access – When you click the **Level Funded** tab the first time, you will have to complete a registration form to link your One Healthcare ID with uhcesservices.com and myallsavers.com. Once you do this you will enjoy the benefits of single sign-on.

Quick Links
Small Group Renewal Packages
Upload Documents
United eServices (UeS)
MyAllSavers
SAM (Oxford CT Read Only)
IDEA (Oxford NY & NJ Read Only)



The screenshot shows the UnitedHealthcare website interface. At the top is the UnitedHealthcare logo. Below it is a dark blue navigation bar with links for Home, Find a Doctor, Plans, and Contact/Commissions. The main content area features a large banner image of three business professionals in an office setting. Below the banner, the text reads "All Savers® Health Plans and Services For the health of your business". There are sections for "Broker Login" and "Not yet appointed? Talk to your state Health Plan." with a list of actions users can take on myallsavers.com. An "Important Update" section provides information about the transition to One Healthcare ID. At the bottom, there are buttons for "Create One Healthcare ID" and "Sign In With One Healthcare ID", along with links for "Questions? Contact Us." and "One Healthcare ID Tutorial".



6 | Quick Links: SAM

The **SAM** link allows you to sign on and access United eServices (UeS) to go into the SAM (Sales Automation Management) application.

1. Click the **SAM** link. The **United eServices** sign on screen displays.
2. Enter your UeS **Username** and **Password**.
3. Click **Submit**. The UeS Home Page displays.
4. Click on the **SAM** button to access SAM.

Note: Manage My UeS ID – If your UeS account is associated to more than one account, a pop-up screen displays asking you to select the account you want to use. Select the account you need or select All. Then click **Submit**.



6 | Quick Links: IDEA

The **IDEA** allows you to sign on and access the UnitedHealthcare Oxford application.

1. Click the **IDEA** link. The **UnitedHealthcare Oxford** home page displays.
2. Click the **Login** button. Log in using your One Healthcare ID.

Quick Links

- [Small Group Renewal Packages](#)
- [Upload Documents](#)
- [United eServices \(UeS\)](#)
- [MyAllSavers](#)
- [SAM \(Oxford CT Read Only\)](#)
- [IDEA \(Oxford NY & NJ Read Only\)](#)



Brokers | My Account | Transactions | Tools & Resources | Search

UnitedHealthcare
Oxford

Log in with your One Healthcare ID

Don't have a One Healthcare ID? Click [Need to Register?](#) below.
Already have a One Healthcare ID? Click [Log In](#) below.

[Log In](#) | [Need to Register?](#)
[Not Yet a Licensed Oxford Broker?](#)

[Why is a One Healthcare ID \(formerly Optum ID\) required?](#)

Messages

- [More Options for Connecticut Employers](#)
- [New York Small Business Q1 2018 Rates and Network Options](#)
- [Enroll Sept. 1, 2017 OHP HMO Groups in an OHI Plan by Aug. 31, 2017](#)
- [July 1, 2017 PDLs for New York and New Jersey Oxford Clients](#)
- [The Member Digital Experience Just Got Better](#)
- [New Jersey Transitional Relief Coverage Extended](#)
- [Remind your clients: Employees to update their contact information](#)
- [Oxford Members Have More Opportunities to Exercise for Rewards](#)
- [New Benefit Added to Oxford Benefit Management Plans](#)
- [View a video about oxfordhealth.com mobile](#)
- [Welcome New Users!](#)
 - [How to obtain a web PIN](#)
 - [New Brokers: How to run a quote](#)
 - [IDEA Online Renewal Process](#)

[Past Messages](#)

Service Notifications

Scheduled System Maintenance:

- Daily from 1:30am to 3:30am EST
- Saturday 6pm to Sunday 6am EST

As a result, certain transactions will be unavailable during these hours. We apologize for any inconvenience and thank you for your patience.

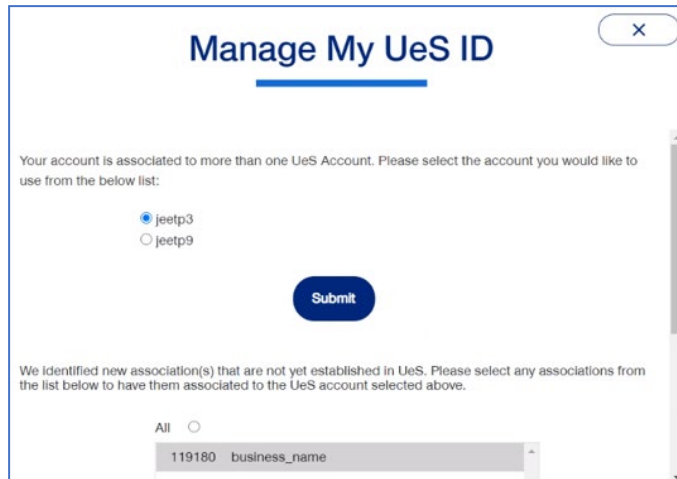


6 | Quick Links: Product Grids

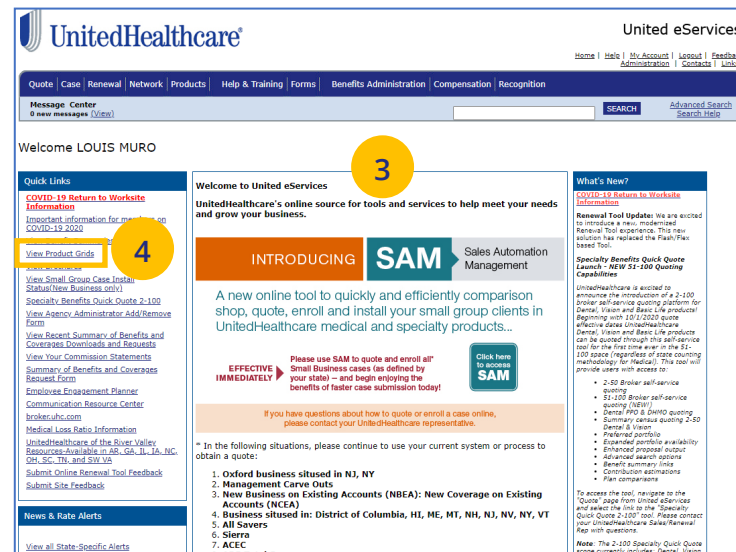
The **Product Grids** link allows you to access UeS to view marketing materials used at the state level that show available products and other related materials.

1. Click the **Product Grids** link. The **United eServices** sign on screen displays.
2. Enter your UeS **Username** and **Password**.
3. Click **Submit**. The UeS Home Page displays.

Note: Manage My UeS ID – If your UeS account is associated to more than one account, a pop-up screen displays asking you to select the account you want to use. Select the account you need or select All. Then click **Submit**.



4. Click the **View Product Grids** link on the UeS home page.



6 | Small Group Quoting & Renewal (SAMx, MyAllSavers)

The **Small Group Quoting & Renewal** section directs you to the correct quoting/enrolling and renewal tool, depending on market, funding, etc.

The screenshot shows a dashboard for 'Small Group Quoting & Renewals'. The top navigation bar includes: Home, Small Group Quoting & Renewals (dropdown), Manage Members (dropdown), Billing & Payment, Reports (dropdown), Plan Documents, Resources (dropdown), Commissions, and Other Applications. The main content area is divided into several sections:

- Help Me Decide:** Includes an image of two people, a description: 'Use Help Me Decide to find right tool for your Quoting and Renewal needs.', and a 'Get Started' button with a right-pointing arrow.
- Quick Links:**
 - Small Group Renewal Packages
 - Upload Documents
 - United eServices (UeS)
 - MyAllSavers
 - SAM
 - IDEA (Oxford NY & NJ Read Only)
 - Product Grids
- Fully Insured (highlighted in yellow):**
 - UnitedHealthcare New Business Quoting SAMx (AL, AZ, CT, IL, IN, KY, ME, MN, MT, NC, ND, NM, OK, OR, SC, SD, WA)
 - Oxford New Business Quoting and Renewals SAMx (CT, NY & NJ)
 - UnitedHealthcare Freedom New Business Quoting Effective October 2021 or Later SAMx (NH)
 - UnitedHealthcare Renewal Processing SAM
 - UnitedHealthcare Renewal Packages
 - United eServices (UeS)
- Level Funded:**
 - New Business Quoting: SAMx - Level Funded (all except for GA, IL, VI and Out of Scope Markets)
 - MyAllSavers (GA, IL, VI)
 - Out of Scope (HI, NV - under 50, NY - under 100, VT)
 - Renewals
 - MyAllSavers

The bottom navigation bar contains five icons with corresponding labels:

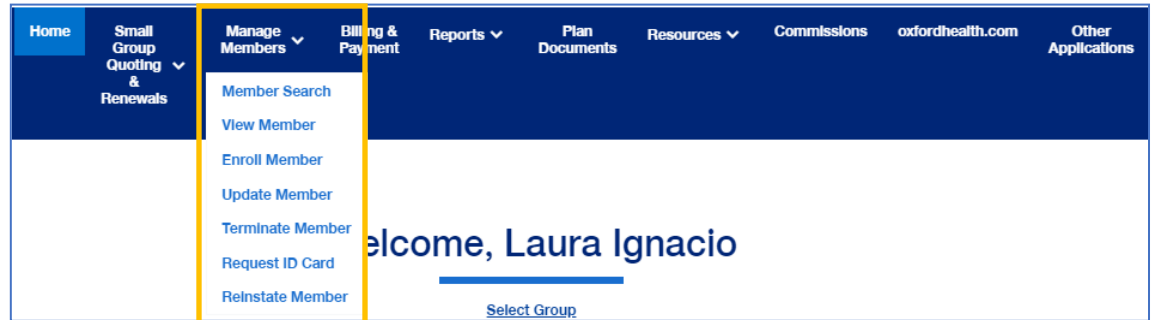
- Quotes View Renewal Package
- View & Pay Bill
- Member Search
- Group Census
- Enrollment



7 | Manage Members

The **Member Services** tab gives you access to the following:

- Member Search
- View Member
- Enroll Member
- Update Member
- Terminate Member
- Request ID Card
- Reinstate Member




7 | Member Search

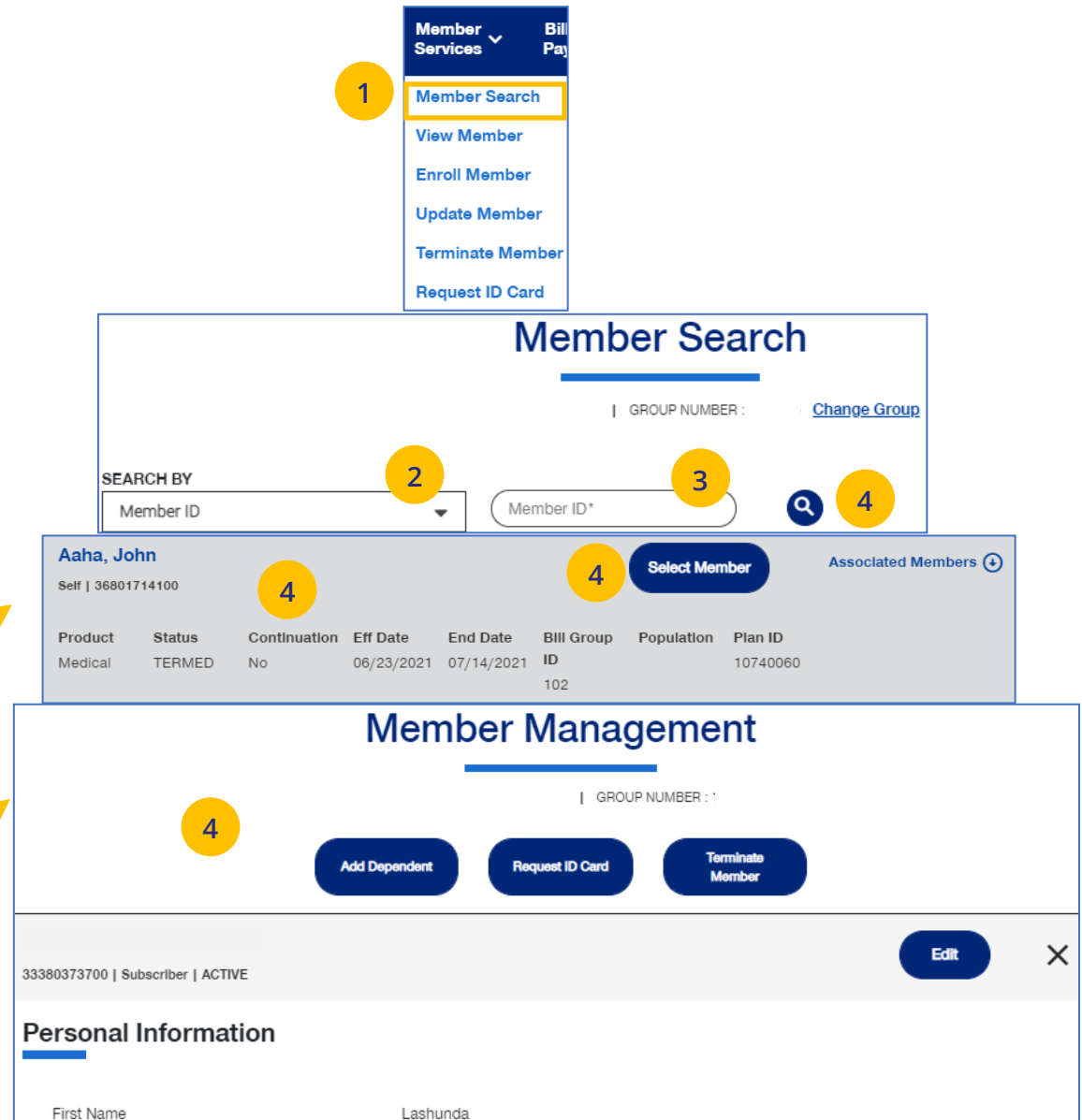
The **Member Search** tab is used to search for a specific member record. You can search for a member using one of the following options:

- Member ID
- First and Last Name
- First Name and Last Four Digits of the Social Security Number (SSN)
- Last Name and Last Four Digits of the SSN

To search for a member:

1. Click the **Member Services** tab and select **Member Search**.
2. Select the search criteria from the **Search By** drop-down.
3. Enter the search criteria.
4. Click the **Search** icon .
 - **If you search using any of the Name options**, the search results will be shown. Click **Select Member**. The **Member Management** screen displays with detailed information on the member.
 - **If you search using Member ID**, the **Member Management** screen displays with detailed information on the member.

Note: The **Member Management** screen shows personal, contact and coverage information, including links to Plan Documents (if available).



The screenshot illustrates the workflow for searching and managing a member. It is divided into three main sections:

- Member Services Menu:** A dropdown menu where 'Member Search' is highlighted (callout 1). Other options include View Member, Enroll Member, Update Member, Terminate Member, and Request ID Card.
- Member Search Screen:** Features a 'SEARCH BY' dropdown (callout 2) set to 'Member ID', a search input field (callout 3) containing 'Member ID*', and a search icon (callout 4). A 'GROUP NUMBER' field with a 'Change Group' link is also present.
- Member Management Screen:** Displays search results for 'Aaha, John' (Self | 36801714100) (callout 4). It includes a 'Select Member' button (callout 4) and an 'Associated Members' link. Below this is a table with columns: Product, Status, Continuation, Eff Date, End Date, Bill Group, Population, and Plan ID. The table shows a single row with values: Medical, TERMED, No, 06/23/2021, 07/14/2021, ID 102, 10740060, and 102. Below the table are buttons for 'Add Dependent', 'Request ID Card', and 'Terminate Member'. A 'GROUP NUMBER : 1' is displayed. At the bottom, there is an 'Edit' button and a close icon (X).




7 | View Member

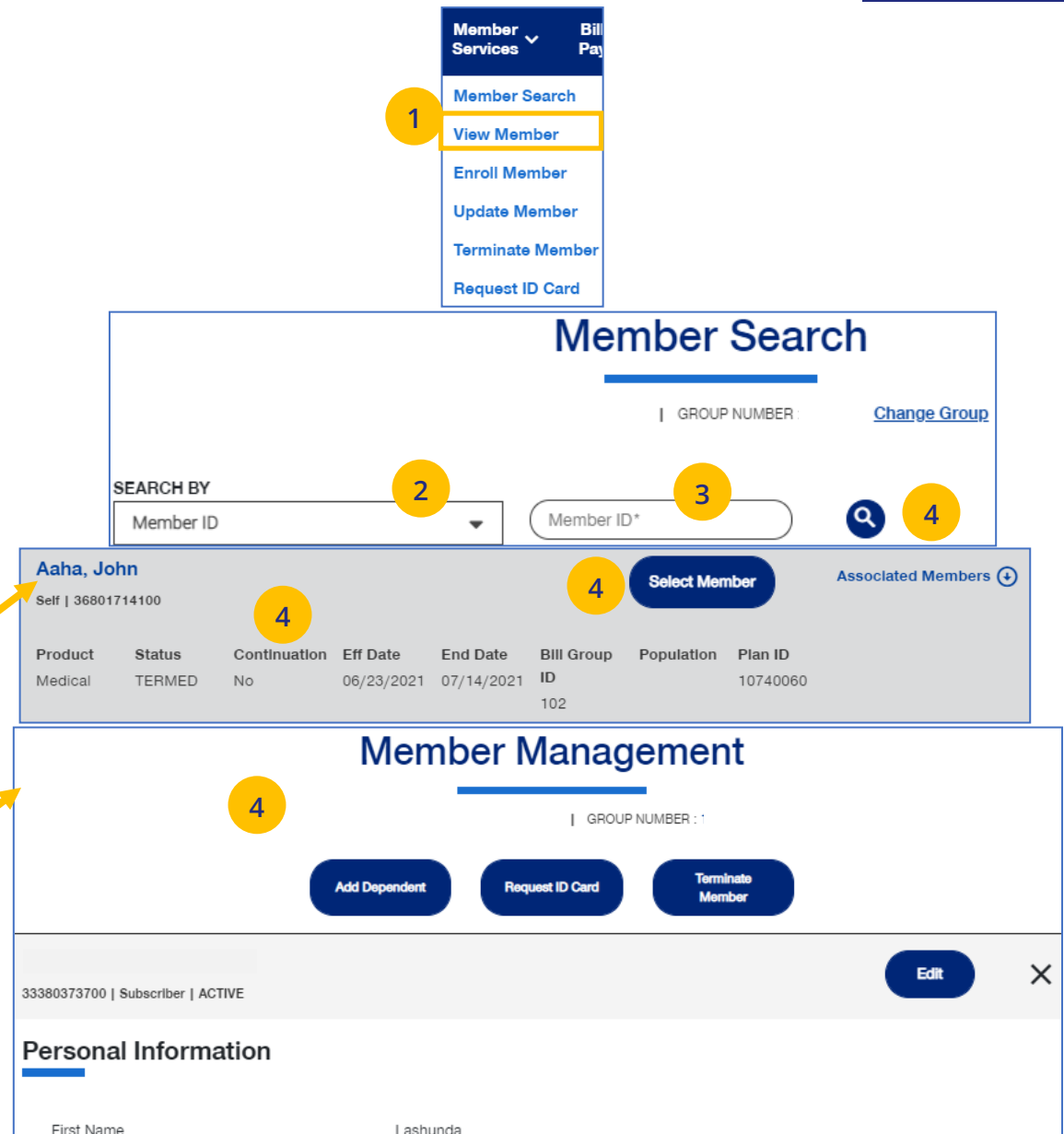
View Member is used to search for a specific member record. You can search for a member using one of the following options:

- Member ID
- First and Last Name
- First Name and Last Four Digits of the Social Security Number (SSN)
- Last Name and Last Four Digits of the SSN

To search for a member:

1. Click the **Member Services** tab and select **View Member**.
2. Select the search criteria from the **Search By** drop-down.
3. Enter the search criteria.
4. Click the **Search** icon .
 - **If you search using any of the Name options**, the search results will be shown. Click **Select Member**. The **Member Management** screen displays with detailed information on the member.
 - **If you search using Member ID**, the **Member Management** screen displays with detailed information on the member.

Note: The **Member Management** screen shows personal, contact and coverage information, including links to Plan Documents (if available).



The screenshot illustrates the process of viewing a member record. It is divided into two main sections: **Member Search** and **Member Management**.

Member Search: This section includes a navigation menu with 'Member Search' highlighted (1). Below it, a 'SEARCH BY' dropdown menu is set to 'Member ID' (2). A search input field contains 'Member ID*' (3), and a search icon is visible (4). The search results show a member named 'Aaha, John' with a 'Self' status and ID '36801714100'. A 'Select Member' button is present (4).

Member Management: This section displays detailed information for the selected member. It includes buttons for 'Add Dependent', 'Request ID Card', and 'Terminate Member'. Below this, there is an 'Edit' button and a close icon. The 'Personal Information' section shows the member's first name as 'Lashunda'.

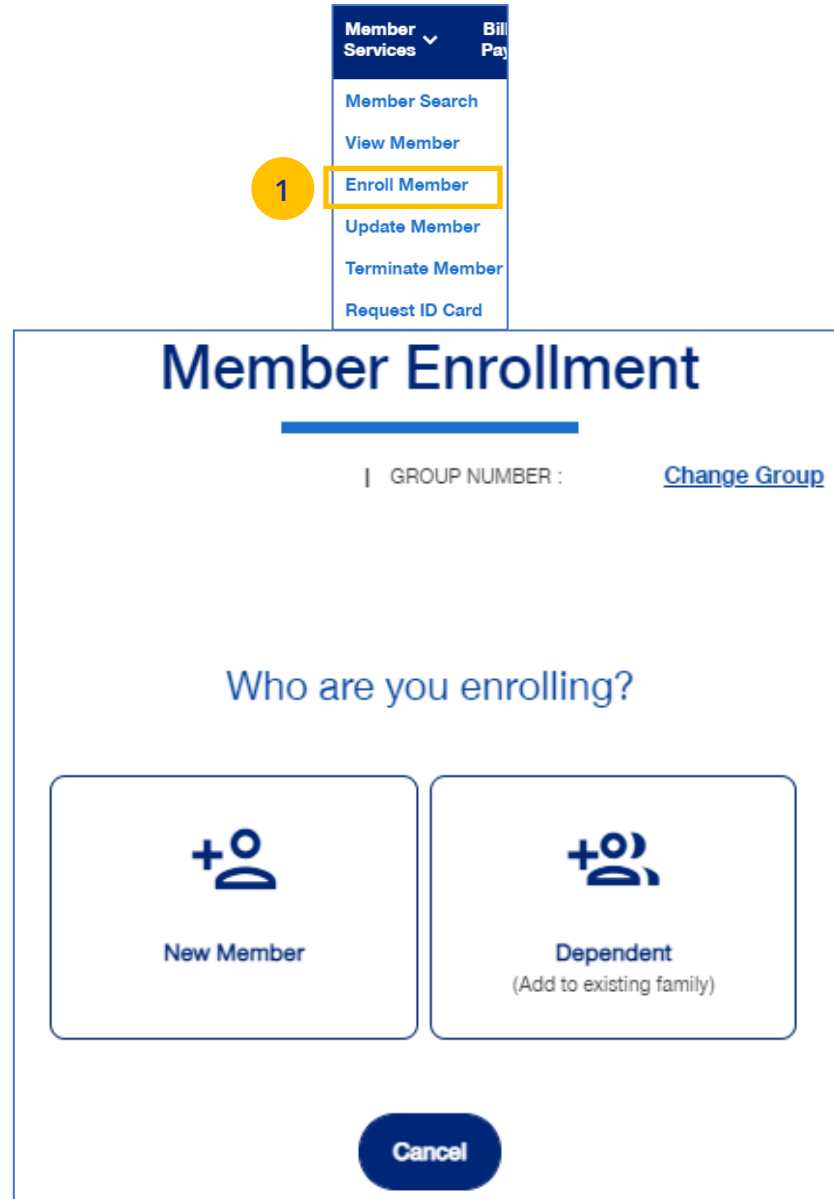
Product	Status	Continuation	Eff Date	End Date	Bill Group ID	Population	Plan ID
Medical	TERMED	No	06/23/2021	07/14/2021	102		10740060



7 | Enroll Member

The **Enroll Member** menu item is used to add a new member or new dependent members to a group.

1. Select **Enroll Member**. The **Member Enrollment** screen displays.



7 | Enroll Member (continued)

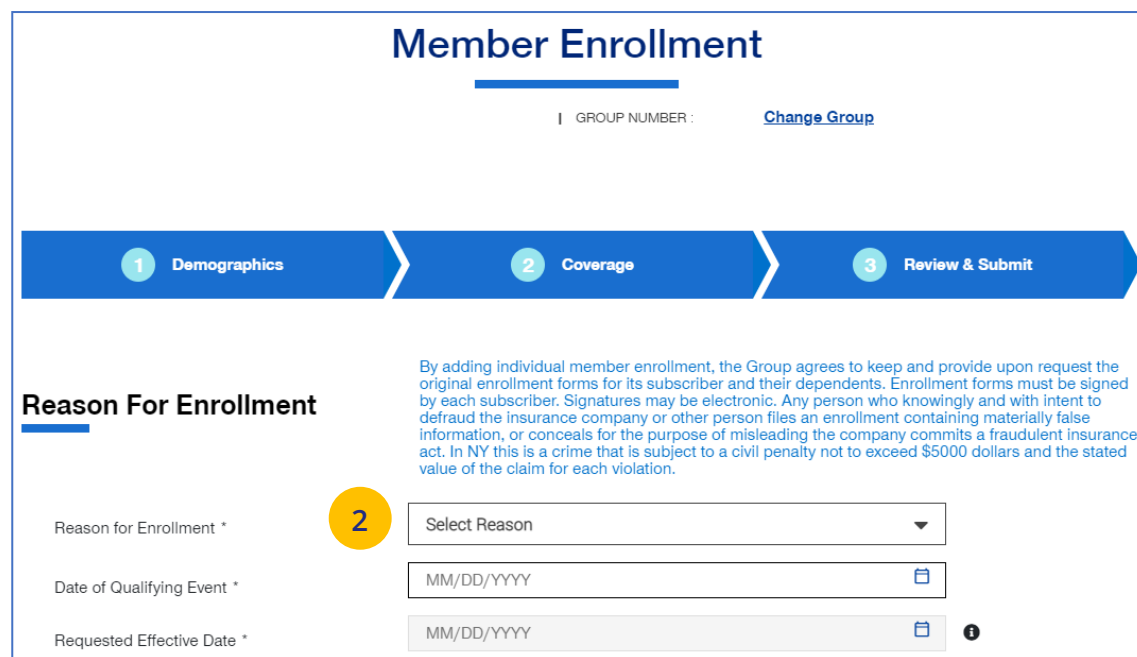
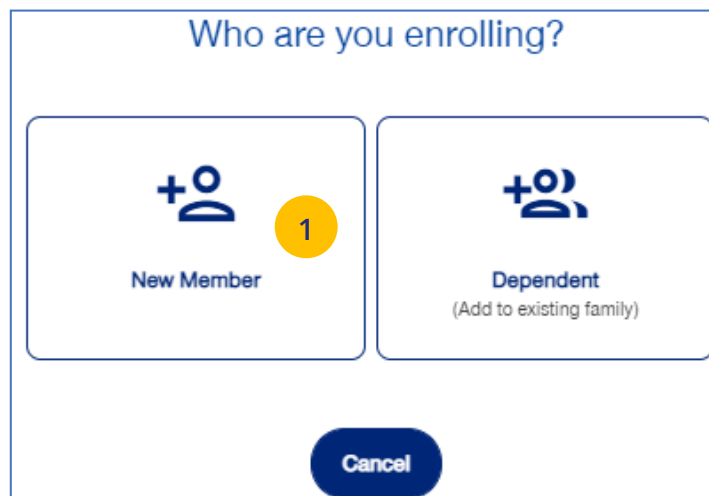
The enroll member process walks you through the **Demographics** and **Coverage** sections, then ask you to **Review & Submit** the new member information.

To enroll a new member:


1. Click the **New Member** box. The **Member Enrollment** detail screen displays.
2. Select the **Reason for Enrollment** using the dropdown.

Note: COBRA Enrollment – If you are enrolling a member into **COBRA**, select **Continuation. IMPORTANT:** An active member must be **terminated** from their current enrollment before being enrolled in COBRA. The member’s COBRA coverage will automatically be terminated at the end of their coverage period unless the member terminates coverage earlier.

Note: For UnitedHealthcare HMO, an information icon **i** will display at the end of the **Reason for Enrollment** field. Click the icon to display a **Reason for Enrollment** pop-up box that shows more information on active enrollment and COBRA enrollment.



7 | Enroll Member (continued)


3. Enter the qualifying event date in the **Date of Qualifying Event** field. **Note: For UnitedHealthcare HMO** – If one of the COBRA options is selected for **Reason for Enrollment**, the **Date of Qualifying Event** can go back up to 36 months.
4. Enter the effective date in the **Requested Effective Date** field. Follow your state guidelines applicable to effective dates. **Note:** If no plans are available for the **Qualifying Event** and **Requested Effective Date**, the message “There are no plans available at this time” displays.
5. Click the information icon  at the end of the **Requested Effective Date** field. A **Waiting Period Rules** pop-up box indicates the specific rules that will apply for effective dates based on the group contract. Click the **X** in the upper-right corner to return to the **Demographics** screens.
6. Enter information in the fields in the **Subscriber information** section. **Note: Social Security Number** - For **UnitedHealthcare HMO** users, the **Select Reason SSN Not Provided** dropdown will not be available. **Note: Custom Attributes** – If a Group has requested it, custom attribute fields will be shown. Entry in these fields is required.

Reason For Enrollment

By adding individual member enrollment, the Group agrees to keep and provide upon request the original enrollment forms for its subscriber and their dependents. Enrollment forms must be signed by each subscriber. Signatures may be electronic. Any person who knowingly and with intent to defraud the insurance company or other person files an enrollment containing materially false information, or conceals for the purpose of misleading the company commits a fraudulent insurance act. In NY this is a crime that is subject to a civil penalty not to exceed \$5000 dollars and the stated value of the claim for each violation.

Reason for Enrollment *

Date of Qualifying Event *

Requested Effective Date * 

Waiting Period Rules

972427 : Coverage will be effective on the date of the qualifying event.

Subscriber Information

First Name*

Middle Name

Last Name *

Suffix

Birth Date *

Gender *

Social Security Number * OR

Date of Hire *

Employment Status



7 | Enroll Member (continued)

7. Enter the enrollee's contact information in the **Contact Information** fields.
8. Click **Add Dependent** or **Next**.

Contact Information


Home Address Line 1*	<input type="text" value="Address Line 1"/>
Home Address Line 2	<input type="text" value="Address Line 2"/>
Home City*	<input type="text" value="Home City"/>
Home State*	<input type="text" value="Select State"/>
Home Zip Code *	<input type="text" value="Zip Code"/>
Home Phone	<input type="text" value="(XXX) XXX-XXXX"/>
Work Phone	<input type="text" value="(XXX) XXX-XXXX"/>
Mobile Phone	<input type="text" value="(XXX) XXX-XXXX"/>
Email Address	<input type="text" value="abc@xyz.com"/>
Preferred Phone	<input type="text" value="Select Phone"/>



7 | Enroll Member (continued)

9. Enter the **Coverage** information in the **Medical Information, Dental Information** (if applicable) and **Vision Information** (if applicable) areas.

Note: For **UnitedHealthcare HMO**, fields displayed under **Medical Information** will be **Plan, HMO Provider ID** and **Current Patient Indicator**. **Plan** and **HMO Provider ID** are required fields.



Medical Information

Plan* CHL - NSE 0-80/30%/1500DED SG 20

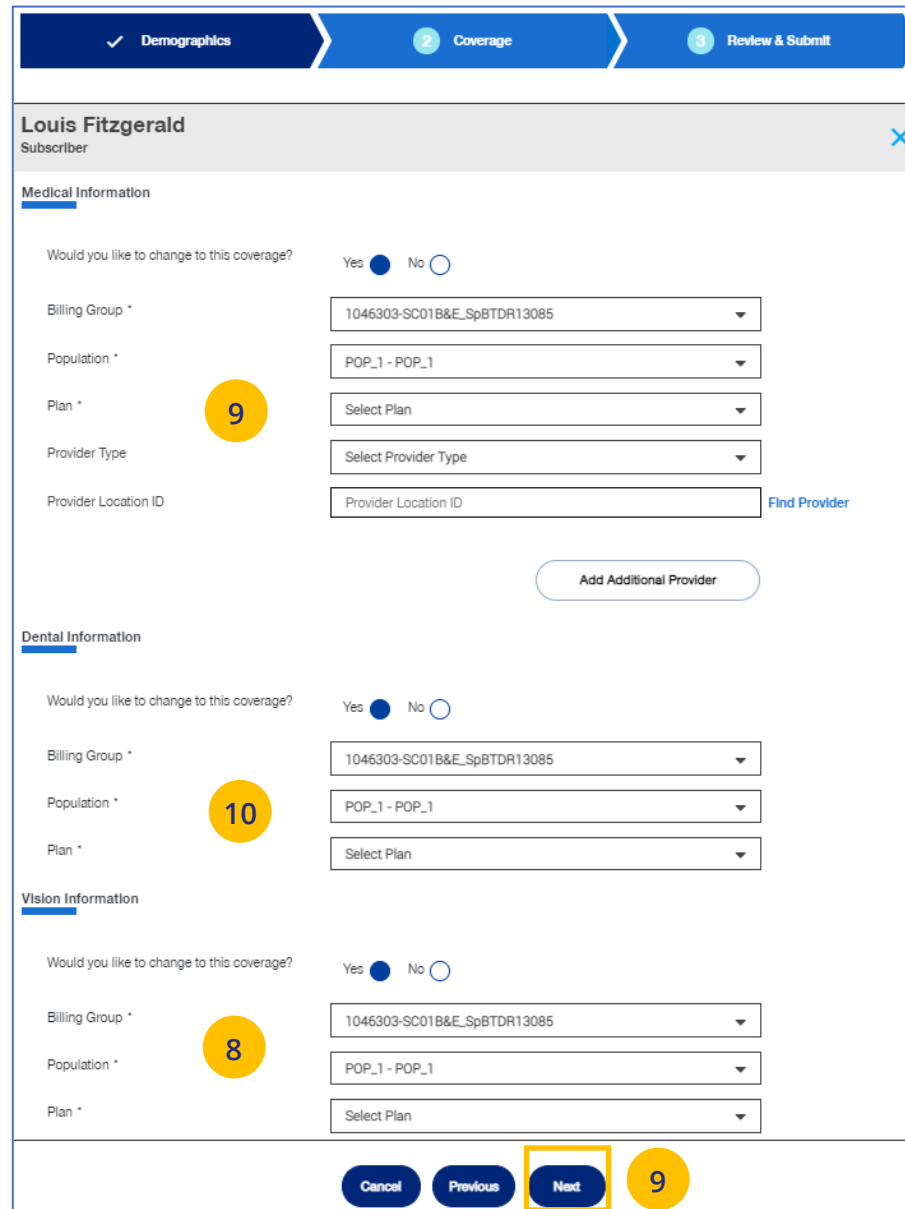
HMO Provider ID * 0284160078 [Find Provider](#)

Current Patient Indicator Yes No

10. Click **Next**.

Note: Dental and Vision are currently not applicable to **UnitedHealthcare HMO**.

Note: The **Billing Group** and **Population** fields are not available for **UnitedHealthcare HMO** users.



Demographics Coverage Review & Submit

Louis Fitzgerald
Subscriber

Medical Information

Would you like to change to this coverage? Yes No

Billing Group * 1046303-SC01B&E_SpBTDR13085

Population * POP_1 - POP_1

Plan * **9** Select Plan

Provider Type Select Provider Type

Provider Location ID Provider Location ID [Find Provider](#)

[Add Additional Provider](#)

Dental Information

Would you like to change to this coverage? Yes No

Billing Group * 1046303-SC01B&E_SpBTDR13085

Population * **10** POP_1 - POP_1

Plan * Select Plan

Vision Information

Would you like to change to this coverage? Yes No

Billing Group * 1046303-SC01B&E_SpBTDR13085

Population * **8** POP_1 - POP_1

Plan * Select Plan

[Cancel](#) [Previous](#) [Next](#) **9**



7 | Enroll Member (continued)

11. Review the information.

- If you need to edit any of the information shown, click the **Edit** button.
- If all the information is correct, scroll down and click **Submit**. A confirmation message displays telling you that **“Member Enrollment is successful.”**

✓ Demographics ✓ Coverage 3 Review & Submit

Reason For Enrollment

11 Edit

Reason for Enrollment	Initial Enrollment
Requested Effective Date	02/01/2021
Date of Qualifying Event	02/01/2021

Vision Information

Billing Group	1046303 - SC01B&E_SpBTDR13085
Population	POP_1 - POP_1
Plan	10252826 - Plan Option 10252826

By adding individual member enrollment, the Group agrees to keep and provide upon request the original enrollment forms for its subscriber and their dependents. Enrollment forms must be signed by each subscriber. Signatures may be electronic. Any person who knowingly and with intent to defraud the insurance company or other person files an enrollment containing materially false information, or conceals for the purpose of misleading the company commits a fraudulent insurance act. In NY this is a crime that is subject to a civil penalty not to exceed \$5000 dollars and the stated value of the claim for each violation.

Submit 11




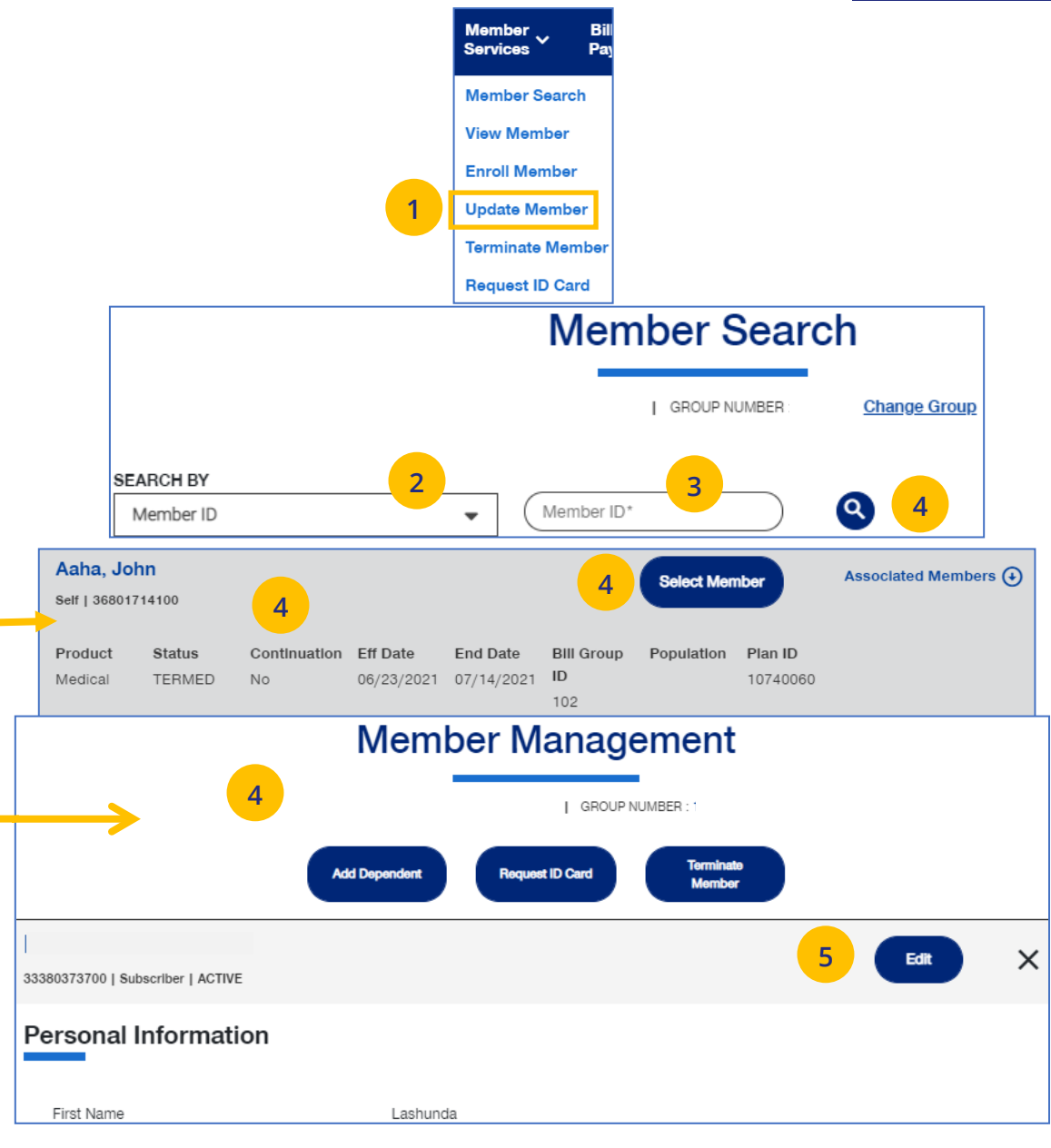
7 | Update Member

Update Member is used to search for and edit a specific member record. You can search for a member using one of the following options:

- Member ID
- First and Last Name
- First Name and Last Four Digits of the Social Security Number (SSN)
- Last Name and Last Four Digits of the SSN

To search for and edit member information:

1. Select **Update Member**.
2. Select the search criteria from the **Search By** drop-down.
3. Enter the search criteria.
4. Click the **Search** icon 
 - **If you search using any of the Name options**, the search results will be shown. Click **Select Member**. The **Member Management** screen displays with detailed information on the member.
 - **If you search using Member ID**, the **Member Management** screen displays with detailed information on the member. **Note:** The **Member Management** screen shows personal, contact and coverage information, including links to Plan Documents (if available).
5. Click the **Edit** button.



The screenshot illustrates the process of updating a member. It shows the 'Member Services' dropdown menu with 'Update Member' highlighted (1). The 'Member Search' screen shows the 'SEARCH BY' dropdown set to 'Member ID' (2), the search input field containing 'Member ID*' (3), and the search icon (4). The search results for 'Aaha, John' are shown, including a table with member details and a 'Select Member' button (4). The 'Member Management' screen for 'Aaha, John' is shown, with the 'Edit' button highlighted (5). The 'Personal Information' section shows the first name 'Lashunda'.

Product	Status	Continuation	Eff Date	End Date	Bill Group ID	Population	Plan ID
Medical	TERMED	No	06/23/2021	07/14/2021	102		10740060



7 | Update Member (continued)

- Update the needed information in the **Demographics** section if needed. You will have to scroll to see all fields.

Note: Updating SSN: If you previously did not include a Social Security Number with a Reason Code, you can now update this number and remove the Reason Code. Once you save the updated Social Security Number, you will not be able to edit. If you entered the wrong social security number when editing, contact Client Services for help.

Note: Social Security Number - For **UnitedHealthcare HMO** users, the **Refusal to Provide** dropdown will not be available.

- Click **Save & Continue**. The message “Updates saved successfully” will be shown and the **Coverage** screens will display.

Member Update

GROUP NUMBER :

1 Demographics 2 Coverage 3 Review & Submit

Louis Dylan ✕

Subscriber | FUTURE

Subscriber Information 6

First Name *	<input type="text" value="Louis"/>
Middle Name	<input type="text" value="Middle Name"/>
Last Name *	<input type="text" value="Dylan"/>
Suffix	<input type="text" value="Select Suffix"/>
Birth Date *	<input type="text" value="06/16/1992"/>
Gender *	<input type="text" value="Male"/>
Social Security Number *	<input type="text" value="XXX-XX-XXXX"/> OR <input type="text" value="Refusal To Provide"/>

Cancel or Exit Save 7 Save and Continue



7 | Update Member (continued)

- Update the needed information in the **Coverage** section if needed. You will have to scroll to see all fields.

Note: Billing Group – In the Billing Group area, you can narrow your search for a billing group by typing in the first few letters or number in the billing group.

Billing Group * 1201 - TOTAL MORTGAGE SERVICES, LLC - 1718478

Note: Billing Group – For **UnitedHealthcare HMO** users, **Billing Group** is not available.

- Click **Save & Continue**.
- When you have completed your updates, review your information and click **Submit**. A “Changes submitted successfully” message will display, telling you the member information has been updated successfully.

Member Update

| GROUP NUMBER :

✓ Demographics 2 Coverage 3 Review & Submit

Updates saved successfully.

Louis Dylan
Subscriber | FUTURE

Coverage Effective Date 8

Requested Effective Date MM/DD/YYYY

Medical Information

Would you like to change to this coverage? Yes No

Cancel or Exit Previous 9 Save & Continue

10 Submit

Changes submitted successfully.




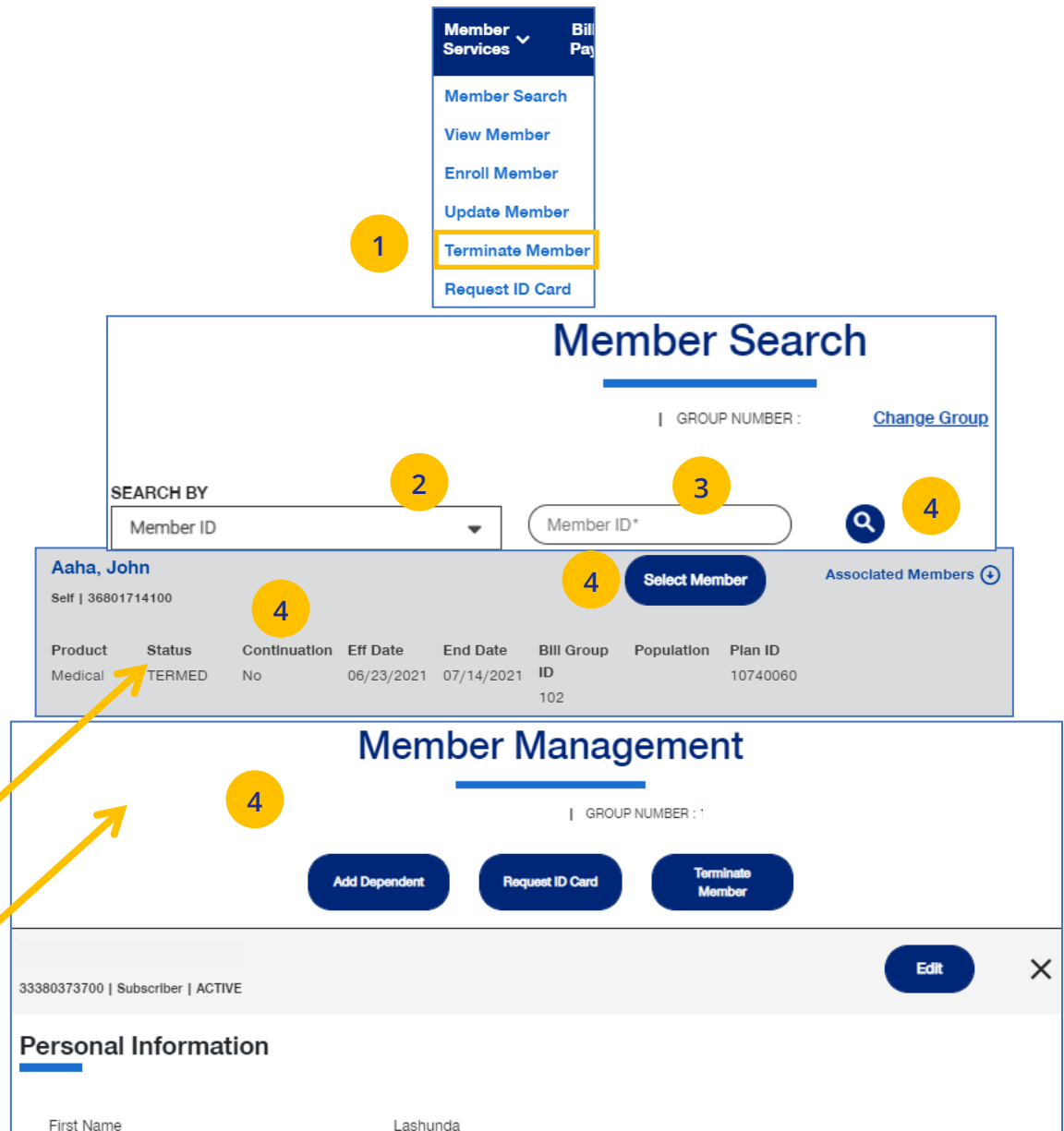
7 | Terminate a Member's Coverage

The **Terminate Member** tab is used to search for and terminate a specific member record. You can search for a member using one of the following options:

- Member ID
- First and Last Name
- First Name and Last Four Digits of the Social Security Number (SSN)
- Last Name and Last Four Digits of the SSN

To search for and terminate a member:

1. Select **Terminate Member**.
 2. Select the search criteria from the **Search By** drop-down.
 3. Enter the search criteria.
 4. Click the **Search** icon .
- **If you search using any of the Name options**, the search results will be shown. Click **Select Member**. The **Member Management** screen displays with detailed information on the member.
 - **If you search using Member ID**, the **Member Management** screen displays with detailed information on the member.



The screenshot shows the 'Member Search' and 'Member Management' screens. A dropdown menu is open under 'Member Services', with 'Terminate Member' highlighted (1). In the 'Member Search' screen, the 'SEARCH BY' dropdown is set to 'Member ID' (2), and the search criteria 'Member ID*' is entered (3). The search icon is clicked (4). The search results show a member named 'Aaha, John' with a 'TERMED' status. The 'Select Member' button is clicked (4). The 'Member Management' screen displays detailed information for the member, including 'Personal Information' (4).

Product	Status	Continuation	Eff Date	End Date	Bill Group ID	Population	Plan ID
Medical	TERMED	No	06/23/2021	07/14/2021	102		10740060



7 | Terminate a Member's Coverage (continued)

5. Click **Terminate Member**. The **Terminate Member Benefits** screen displays.
6. In the **Termination Reason** section, use the **Select Reason** dropdown to enter the reason for the termination.

Note: COBRA Termination – For COBRA Terminations, select **Discontinue COBRA** for the **Termination Reason**.

7. Enter the requested termination date in the **Requested Termination Date** field.

Note: Help with Determining Date – When you click the **Help with Determining Date** link, the following pop-up box displays:

Help with Determining Date

The term date should be the last day of coverage. Example – if coverage runs through January and member should not have coverage in February, the term date is 1/31/XX. If there should be no coverage at all (delete coverage), then term date should be one day prior to coverage effective date. Example – if coverage began 2/1/XX and you need to delete the coverage entirely, term the member 1/31/XX.

8. Click the information icon **i** after **Requested Effective Date**. A **Waiting Period Rules** box indicates rules that apply for termination dates based on the group contract. Click the **X** in the upper-right corner to return to the **Terminate Member Benefits** screen.

Member Management

GROUP NUMBER :

Add Dependent Request ID Card **Terminate Member** 5

Louis Dylan 54867991300 | Subscriber | FUTURE Edit X

Personal Information

Terminate Member Benefits

GROUP NUMBER :

Reason for Termination

Termination Reason* 6 Select Reason

Requested Termination Date* 7 MM/DD/YYYY Help with Determining Date 8

Waiting Period Rules

Termination will be effective on the last day of the month of the qualifying termination event.



7 | Terminate a Member's Coverage (continued)

9. Scroll down to the **Member Information** section and click the **Select** box for each member whose coverage is being terminated.
10. Click **Next**. The **Terminate Member Benefits** screen displays, asking you to confirm that the information is correct.

Note: If you terminate the coverage for the subscriber, the system will also select all dependents for termination.

Member Information

Multiple selections are allowed. Please select each applicable row.

John Doe Subscriber Male	Member ID 70514124400	Date of Birth 01/01/1972	Effective Date 04/01/2020	Status ACTIVE	Select <input checked="" type="checkbox"/> Medical
Jane Doe Spouse Female	Member ID 70514124401	Date of Birth 02/01/1972	Effective Date 04/01/2020	Status ACTIVE	Select <input checked="" type="checkbox"/> Medical
Jonathan Doe Child Male	Member ID 70514124402	Date of Birth 07/19/2001	Effective Date 04/01/2020	Status ACTIVE	Select <input checked="" type="checkbox"/> Medical
Janet Doe Child Female	Member ID 70514124403	Date of Birth 08/11/2006	Effective Date 04/01/2020	Status ACTIVE	Select <input checked="" type="checkbox"/> Medical
Jack Doe Child Male	Member ID 70514124404	Date of Birth 08/08/1998	Effective Date 04/01/2020	Status ACTIVE	Select <input checked="" type="checkbox"/> Medical

By adding individual member enrollment, the Group agrees to keep and provide upon request the original enrollment forms for its employees and their dependents. Enrollment forms must be signed by each employee. Signatures may be electronic. Any person who knowingly and with intent to defraud the insurance company or other person files an enrollment containing materially false information, or conceals for the purpose of misleading the company commits a fraudulent insurance act. In NY this is a crime that is subject to a civil penalty not to exceed \$5000 dollars and the stated value of the claim for each violation.


10



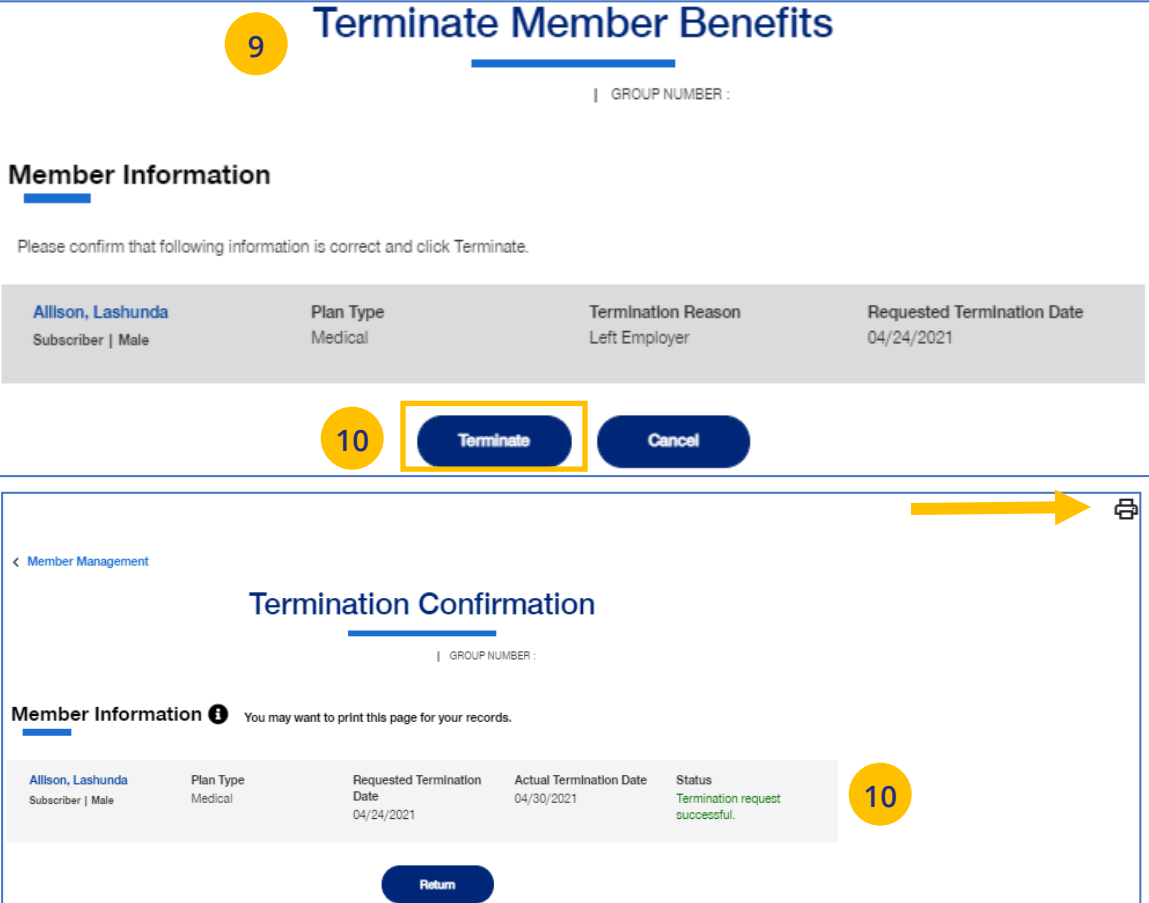
7 | Terminate a Member's Coverage (continued)

11. Click **Terminate**. A message displays telling you the member has been terminated successfully.

Note: Print Termination Confirmation

Option – If you want paper confirmation when the Termination Confirmed message displays, click the Print icon  to print the termination confirmation.

Note: Group Termination: When a Group is terminated, Broker and UHC Employee access to the Group is no longer available from the uhceservices.com website (as of the Group termination date).



The image shows two screenshots from a web application. The top screenshot is titled "Terminate Member Benefits" and features a yellow circle with the number "9" in the top left. Below the title is a "GROUP NUMBER:" field. Underneath is a "Member Information" section with a blue underline. A message reads: "Please confirm that following information is correct and click Terminate." Below this is a table with the following data:

Member Name	Plan Type	Termination Reason	Requested Termination Date
Allison, Lashunda Subscriber Male	Medical	Left Employer	04/24/2021

At the bottom of this screen are two buttons: "Terminate" (highlighted with a yellow box and a yellow circle with "10") and "Cancel".

The bottom screenshot is titled "Termination Confirmation" and features a yellow circle with the number "10" in the top right. It has a "GROUP NUMBER:" field. Below is a "Member Information" section with a blue underline and an information icon. A message reads: "You may want to print this page for your records." Below this is a table with the following data:

Member Name	Plan Type	Requested Termination Date	Actual Termination Date	Status
Allison, Lashunda Subscriber Male	Medical	04/24/2021	04/30/2021	Termination request successful.

At the bottom of this screen is a "Return" button. A yellow arrow points to a print icon in the top right corner of the screenshot.




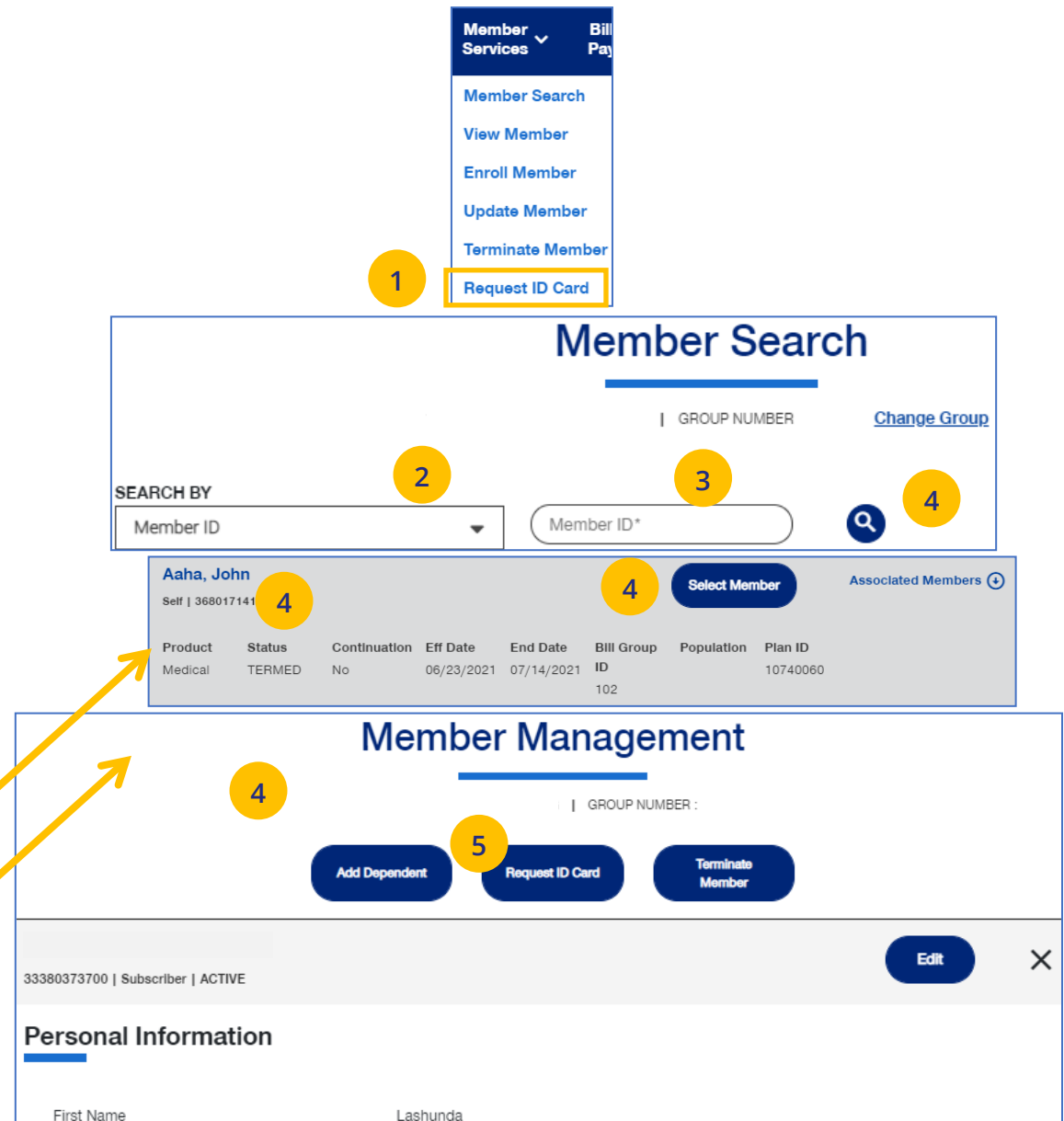
7 | Request a Health Plan ID Card

The **Request ID Card** tab is used to search for a member and then (1) request an ID card be mailed to that member, or (2) print an ID card. You can search for a member using one of the following options:

- Member ID
- First and Last Name
- First Name and Last Four Digits of the Social Security Number (SSN)
- Last Name and Last Four Digits of the SSN

To Request an ID Card:

1. Select **Request ID Card**.
2. Select the search criteria from the **Search By** drop-down.
3. Enter the search criteria.
4. Click the **Search** icon .
 - **If you search using any of the Name options**, the search results will be shown. Click **Select Member**. The **Member Management** screen displays with detailed information on the member.
 - **If you search using Member ID**, the **Member Management** screen displays with detailed information on the member.
5. Click **Request ID Card**.



The screenshot shows the 'Member Search' and 'Member Management' screens. A dropdown menu is open under 'Member Services', with 'Request ID Card' highlighted (1). In the 'Member Search' section, the 'SEARCH BY' dropdown is set to 'Member ID' (2), and the search input field contains 'Member ID*' (3). A search icon (4) is visible. Below the search bar, a member profile for 'Aaha, John' is displayed (4), including a 'Select Member' button. A table of member details is shown below the profile:

Product	Status	Continuation	Eff Date	End Date	Bill Group ID	Population	Plan ID
Medical	TERMED	No	06/23/2021	07/14/2021	102		10740060

The 'Member Management' screen (4) shows buttons for 'Add Dependent', 'Request ID Card' (5), and 'Terminate Member'. Below this, the 'Personal Information' section is visible, showing 'First Name' as 'Lashunda'.



7 | Request a Health Plan ID Card (continued)

- Select the member and (1) click **Print ID Card** to print the card or save it as a pdf, **or** (2) click **Order ID Card** to order the card. For **Dental** cards, only **Print ID Card** is available.

The message “Request sent successfully” displays. Repeat this for other members or dependents if needed.

Note: If any dependent is classified as “infant,” their status must be changed to “Child” before a Health Plan ID card can be ordered or printed.

Note: If there is a member change, it will take 24 to 48 hours for a new ID card to be available.

Note: Only **Medical ID Cards** are available for **UnitedHealthcare HMO** users.

Request ID Card

The following ID card options are available. Select one or more options below. Mailed ID Cards will arrive in 7-10 business days.

Note: Member ID cards will be automatically mailed to members after an enrollment or plan change.

Medical

<input checked="" type="radio"/>	James Bond Subscriber - DOB 02/07/1998	Coverage Start 02/10/2021
<input type="radio"/>	Jimmy Bond Child - DOB 10/12/2021	Coverage Start 11/12/2021

Print ID Card Image **6** **Mail ID Card**

<input checked="" type="radio"/>	John Doe Subscriber
<input type="radio"/>	Jane Doe Spouse
<input type="radio"/>	Jonathan Doe Child
<input type="radio"/>	Janet Doe Child
<input type="radio"/>	Jack Doe Child

Print Medical ID Card **Order Medical ID Card** **6**


Request sent successfully

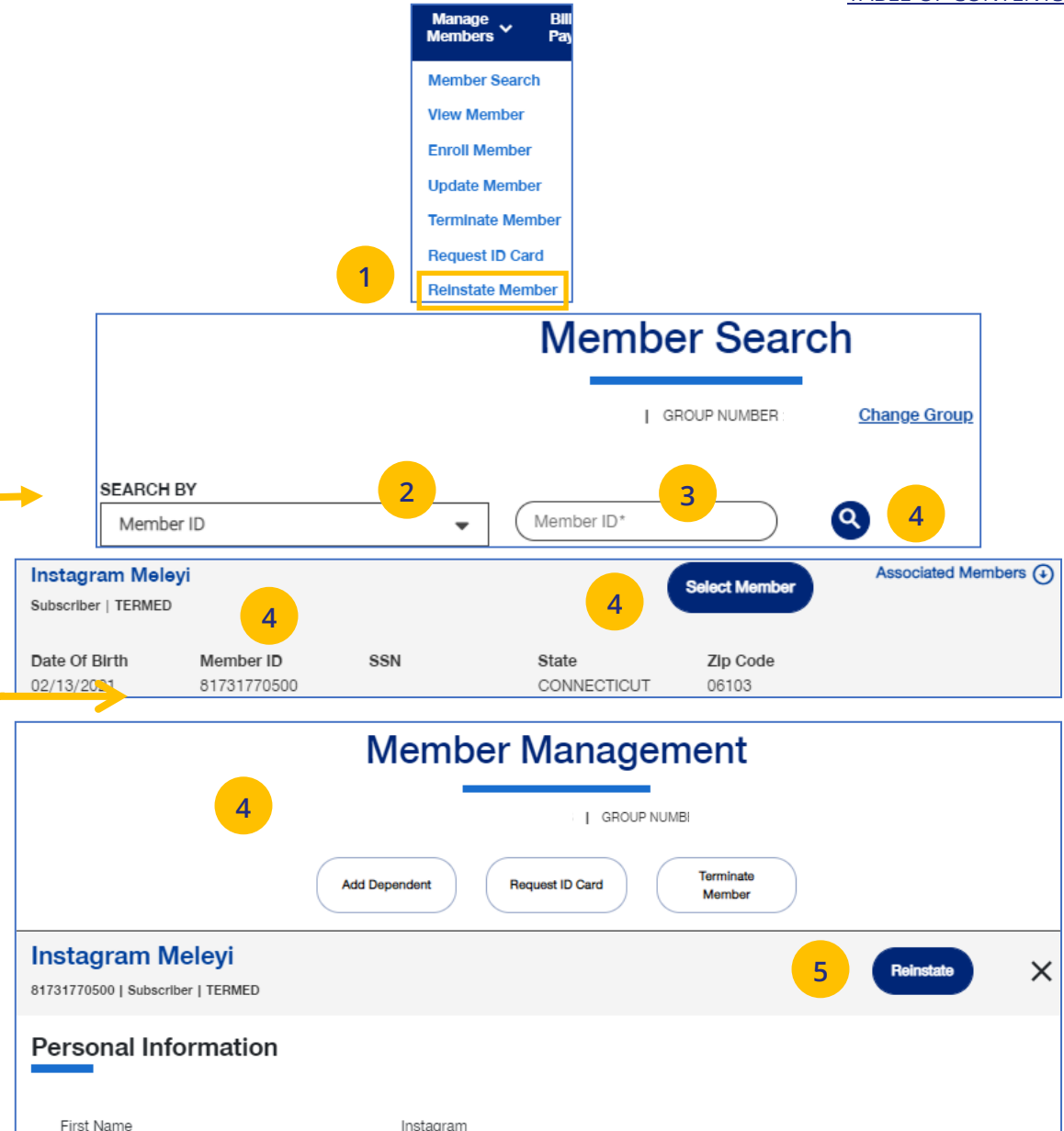


7 | Reinstate Member

Reinstate Member is used to reinstate a member, and dependents if needed, who were previously terminated. The reason can be for COBRA and non-COBRA reasons.

To search for and reinstate a termed member:

1. Select **Reinstate Member**.
2. Select the search criteria from the **Search By** drop-down.
3. Enter the search criteria.
4. Click the **Search** icon .
 - **If you search using any of the Name options**, the search results will be shown. Click **Select Member**. The **Member Management** screen displays with detailed information on the member.
 - **If you search using Member ID**, the **Member Management** screen displays with detailed information on the member. **Note:** The **Member Management** screen shows personal, contact and coverage information, including links to Plan Documents (if available).
5. Click the **Reinstate** button.



The screenshot illustrates the process of reinstating a member through a web application. It is divided into two main sections: Member Search and Member Management.

Member Search Section:

- 1:** A dropdown menu under "Manage Members" is open, with "Reinstate Member" highlighted in yellow.
- 2:** The "SEARCH BY" dropdown menu is set to "Member ID".
- 3:** The search input field contains "Member ID*".
- 4:** The search icon (magnifying glass) is highlighted.

Member Management Section:

- 4:** The member details for "Instagram Meleyi" are shown, including "Subscriber | TERMED", "Date Of Birth: 02/13/2031", "Member ID: 81731770500", "SSN", "State: CONNECTICUT", and "Zip Code: 06103". A "Select Member" button is highlighted.
- 4:** The "Member Management" screen shows options: "Add Dependent", "Request ID Card", and "Terminate Member".
- 5:** The "Reinstate" button is highlighted.

Member Management Details:

- Member Name:** Instagram Meleyi
- Member ID:** 81731770500
- Status:** Subscriber | TERMED
- Personal Information:** First Name: Instagram



7 | Reinstate Member (continued)

- Update the needed information for the reinstatement in the **Demographics** sections: **Reason for Enrollment, Subscriber Information, Contact Information, Dependent** and **Contact Information**. You will have to scroll down to see all fields.

Note: Updating SSN: If you previously did not include a Social Security Number with a Reason Code, you can now update this number and remove the Reason Code. Once you save the updated Social Security Number, you will not be able to edit. If you entered the wrong social security number when editing, contact Client Services for help.

Note: Social Security Number - For UnitedHealthcare HMO users, the **Refusal to Provide** dropdown will not be available.

- Click **Save and Continue**. The message “Updates saved successfully” will be shown and the **Coverage** screens will display.

Reinstate Member

GROUP NUMBER :

1 Demographics 2 Coverage 3 Review & Submit

Reason For Enrollment

By adding individual member enrollment, the Group agrees to keep and provide upon request the original enrollment forms for its subscriber and their dependents. Enrollment forms must be signed by each subscriber. Signatures may be electronic. Any person who knowingly and with intent to defraud the insurance company or other person files an enrollment containing materially false information, or conceals for the purpose of misleading the company commits a fraudulent insurance act. In NY this is a crime that is subject to a civil penalty not to exceed \$5000 dollars and the stated value of the claim for each violation.

Reason for Enrollment *

Date of Qualifying Event *

Requested Effective Date *

Instagram Meleyi
Subscriber | TERMED

Reinstatement for this subscriber may fail based on the group's rules.

Subscriber Information

First Name*

Cancel Save and Continue



7 | Reinstate Member (continued)

- Update the needed information in the **Coverage** section if needed. You will have to scroll to see all fields.

Note: Billing Group – In the Billing Group area, you can narrow your search for a billing group by typing in the first few letters or number in the billing group.

Billing Group * 1201 - TOTAL MORTGAGE SERVICES, LLC - 1718478

Note: Billing Group – For **UnitedHealthcare HMO** users, Billing Group is not available.

- Click **Save & Continue**.
- When you have completed your updates, review your information and click **Submit**. A “Changes submitted successfully” message will display, telling you the member information has been updated successfully.

Newborn to Child Status – If a child dependent is in temporary **newborn** status, the coverage will terminate unless the child is enrolled as a new dependent. Once the newborn is enrolled, the status will change to **child**. If the child dependent has already been terminated, go through the reinstatement process, if needed, to reinstate the child dependent. **Note:** Twins with the same last name and date of birth cannot be enrolled. Call Client Services at 1-866-908-5940.

Member Update

GROUP NUMBER :

Demographics Coverage Review & Submit

Updates saved successfully.

kath Bennett
Subscriber | ACTIVE

Coverage Effective Date

Requested Effective Date MM/DD/YYYY

Medical Information

Would you like to change to this coverage? Yes No

Billing Group * 1030902 - CT LIBERTY HMO GATED BASE PLAN

Plan * 10740060 - CT LIBERTY HMO GATED BASE PLAN | CT LIBERTY

Provider Effective Date 06/10/2021

Provider Type * PCP

Provider Location ID * 4576279 Find Provider

PCP 4576279

Cancel or Exit Previous Save & Continue

Submit

10

Changes submitted successfully.



8 | Billing & Payment

The **Billing & Payment** tab displays billing and payment information related to a specific group. This information comes directly from our internal billing system BRMS (Billing and Receivable Management Solution).

Information shown includes:

- Invoices (Open and Closed Invoices)
- Payment History
- Payment Method
- Notifications
- Billed vs. Paid Data
- Help (Help files related to each menu item)
- System Alerts

Note: Billing and Payment information for UnitedHealthcare HMO users is available on Employer eServices. Click the link on the Billing & Payment screen to go to Employer eServices.

The screenshot shows the 'Billing & Payment' interface. At the top, there is a navigation bar with options like Home, Small Group Quoting & Renewals, Manage Members, Billing & Payment (selected), Reports, Plan Documents, Resources, Commissions, oxfordhealth.com, and Other Applications. Below the navigation bar, the main heading is 'Billing & Payment' with a sub-heading 'GROUP NUMBER' and a 'Change Group' link. A secondary navigation bar includes Invoices, Payment History, Payment Method, Notifications, Bill vs Paid, Help, and System Alerts (0). The 'Account Summary' section displays: Last Payment Rec'd (10/26/2021, \$7,596.26), Next Payment Due Date (11/18/2021, \$7,596.26), and Current Balance (\$15,192.52). The 'Open Invoice Listing' section shows a table with columns for Invoice Date, Invoice Number, Due Date, Policies, Bill Group, Invoice Type, Payment(s) Pending, Adjustment(s) Pending, Amount, and Outstanding Balance. Two invoices are listed, both for \$7,596.26. A total row shows \$15,192.52. Below the table is an 'Aging' section with a note and a table showing aging amounts for Future, 0-30, 30-60, 61-90, 91-120, 120+, and Total past due balance.

This thumbnail shows a smaller version of the 'Billing & Payment' interface. It includes the same navigation and account summary. A blue callout box with a yellow border contains the text: 'UnitedHealthcare HMO group Billing and Payment information is available on Employer eServices'. Below this text is a button that says 'Click here to go to Employer eServices'.

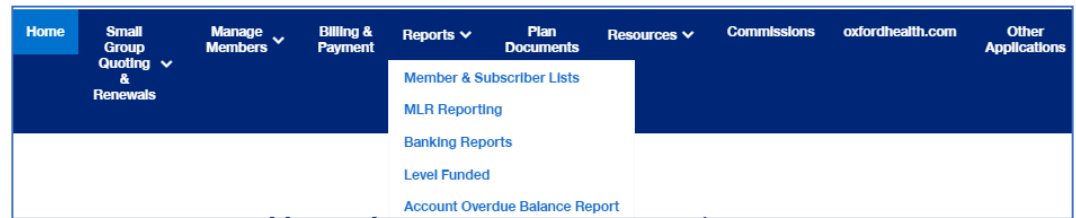


9 | Reports

You can use the **Reports** tab to generate specific reports including:

- **Member & Subscriber Lists** that shows all subscribers or members affiliated with the Group.
- **MLR Reporting** tab used to access the annual report on rebates as mandated by the Medical Loss Ratio provision of the health care reform.
- **Banking Reports** that show daily, monthly and historical banking reports for the Group.
- **Level Funded** reports that show the Monthly Executive Summary, the IRS Documents 6055 and IRS documents 1095 B reports.
- **Account Overdue Balance Report** reports show groups with (1) late payments, or (2) terminations due to lack of payment.

Note: Member & Subscriber Lists is the only report option currently available for **UnitedHealthcare HMO** users.



9 | Member & Subscriber Lists

To generate the Member or Subscriber List:

1. Click the **Reports** tab.
2. Select **Member & Subscriber Lists**. The **Member & Subscriber Lists** screen is shown.

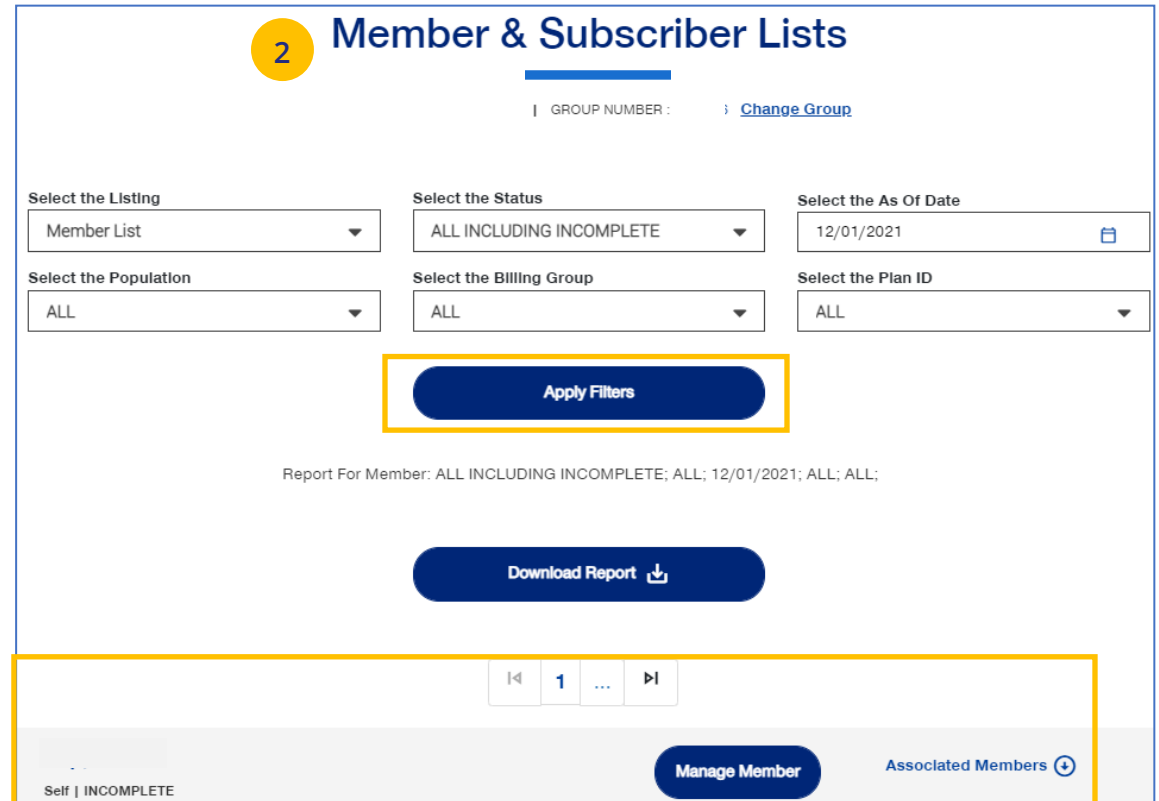
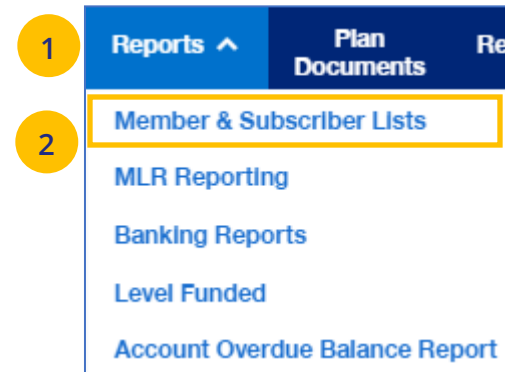
Note: Member List is the default and the default report will be shown when the screen displays. Just scroll down to view members in the report who met the default search criteria.

Note: The **Select the Billing Group** and **Select the Plan ID** fields are not available for **UnitedHealthcare HMO** users.

To Change the Search Criteria: Use the dropdowns in each field to enter the needed information. Fields include:

- Member List or Subscriber List
- Status (All Including Complete, All Excluding Complete, Active, Pending, Termined, Incomplete)
- As of Date
- Population
- Billing Group
- Plan ID

After selecting your search criteria, click **Apply Filters**. Scroll down to view the members or subscribers that met your search criteria.



9 | Member & Subscriber Lists (continued)

To generate the Member or Subscriber List:

3. Click **Download Report**. A message indicates that you will be notified in the **Message Center** when your report is ready. When the report is ready a number will be displayed next to the bell icon.

The screenshot displays the 'Member & Subscriber Lists' interface. At the top, it shows 'LM SMITH, INC.' and 'GROUP NUMBER: 999' with a 'Change Group' link. Below this are six filter dropdown menus: 'Select the Listing' (Member List), 'Select the Status' (ALL INCLUDING INCOMPLETE), 'Select the As Of Date' (03/01/2021), 'Select the Population' (ALL), 'Select the Billing Group' (ALL), and 'Select the Plan ID' (ALL). A blue 'Apply Filters' button is centered below the filters. Underneath, it states 'Report For Member: ALL INCLUDING INCOMPLETE; ALL; 03/01/2021; ALL; ALL;'. A yellow box highlights the 'Download Report' button with a yellow circle containing the number '3'. Below this, a green message box says 'Your request to download the report is successful. You will be notified in the Message Center when your report is complete.' At the bottom of the interface, the United Healthcare logo is on the left, and on the right, there is a yellow circle with '3', a bell icon with a '2' notification badge (highlighted with a yellow box), a user profile icon for 'Laura Igna... Stage ENV', and a settings gear icon.



9 | Member & Subscriber Lists (continued)

4. Click on the bell icon to open **Message Center**.
5. Click on the plus sign.
6. Click on the attachment link to display the report.

Note: After you have finished using the report, you can delete it from the **Message Center** by checking the box and clicking the **Delete Selected** button.

The screenshot shows the United Healthcare Message Center interface. At the top, there is a navigation bar with the United Healthcare logo, a notification bell icon (circled in yellow with a '4'), a user profile icon for 'Laura Igna... Stage ENV', and a settings gear icon. The main content area is titled 'Message Center' and includes a 'SORT BY:' dropdown menu set to 'Date Descending' and a 'Delete Selected' button. Below this is a pagination control showing '1' of 1 items. A table lists messages with columns for 'Date/Time', 'From', and 'Subject'. The first message is from 'SYSTEM' with the subject 'Member Subscriber List'. A plus sign icon (circled in yellow with a '5') is next to this message. Below the table, the message details are shown, including 'To: Ilgnacio2', 'From: SYSTEM', 'Date: 2021-03-01 09:09:15.0', 'Message Expiration Date: 2021-06-01 09:09:17.0', and 'Subject: Member Subscriber List'. Under 'Attachments and Links', there is a link to 'MembersListReport.xlsx' (circled in yellow with a '6').

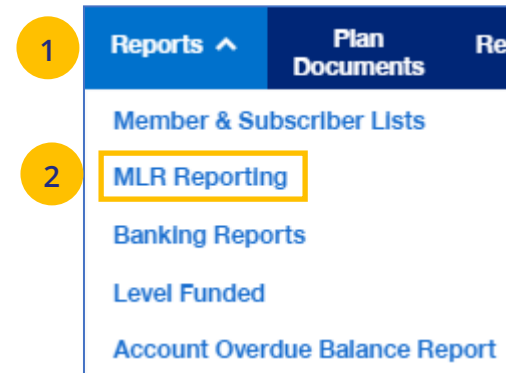


9 | MLR Reporting

The **MLR Reporting** tab allows you to generate the Medical Loss Ratio (MLR) Information report. You can download the report as a pdf document or as an Excel file.

Note: This report is not available for **UnitedHealthcare HMO** users.

1. Click the **Reports** tab.
2. Select **MLR Reporting**. The **MLR Reporting** screen displays with the report. Brokers will see a list of associations to pick from.
3. You can view a snapshot of the report in the window or click Export to PDF to generate a pdf file or Export as Excel to download an Excel report.



A screenshot of the 'MLR Reporting' screen. The title 'MLR Reporting' is at the top, with a 'Change Broker' link below it. There are two buttons: 'Export as PDF' (highlighted with a yellow circle '3') and 'Export as Excel'. Below the buttons is a pagination control showing '1' of 1 pages. A table of data is displayed below, with a yellow circle '2' highlighting the 'Aggregate Rebate Amount Owed' column.

Policy Year	Policy #	Legal Entity	State	MLR Case Size	MLR Reported Percentage	Aggregate Premium Revenue	Aggregate Rebate Amount Owed	Distributed Rebate Amt for Employer Policy
2018	01Y1351	UnitedHealthcare Insurance Company	USALA	L	81.900%	\$300,537,476.50	\$9,316,661.77	\$2,185.29
2018	09Y7576	Optimum Choice, Inc.	USADC	S	78.700%	\$4,395,553.69	\$57,142.20	\$6.47



9 | Banking Reports

The **Banking Reports** tab allows you to generate the daily, monthly and historical banking reports for a specific Group.

Note: This report is not available for **UnitedHealthcare HMO** users.

Note: The banking reports are for ASO groups only. The reports will be either a pdf document or an Excel file.

1. Click the **Reports** tab.
2. Click the **Banking Reports** tab. The **Banking Reports** window displays with the Daily, Monthly and Historical Banking reports.
3. Click the **File Link** to view the report.

The screenshot shows the 'Banking Reports' interface. At the top, a navigation menu has 'Reports' (1) selected, with a dropdown menu showing 'Banking Reports' (2) highlighted. Below this, the 'Banking Reports' page title is displayed. A 'GROUP NUMBER' field is present with a 'Change Group' link. A callout '2' points to the instruction: 'To view a banking report, Select from the report listed below.' The main content area is divided into three sections: 'Daily Banking Reports', 'Monthly Banking Reports', and 'Historical Banking Reports'. The 'Daily Banking Reports' section contains a table with two rows of report data. A callout '3' points to the 'File Link' column of the first row. The 'Monthly Banking Reports' section shows 'No reports found'. The 'Historical Banking Reports' section is currently empty. At the bottom, there are filters for 'Select the Report *' (set to 'Aged Outstanding') and 'Select the Date Range' (set to '12/14/2020 - 12/14/2020'), followed by an 'Apply' button.

Daily Report Name	Last Updated	File Link
Charge Claim Activity	2020-12-14	
Funding Advice	2020-12-08	



9 | Banking Reports (continued)

Selecting Other Reports

You can generate and view different reports using the dropdown.

1. Select the report you need from the **Select the Report** dropdown list.
2. Select the date range you need in the **Select the Date Range** field.
3. Click **Apply** to display the report.

Below is a list of available reports and descriptions.

Report Name	Report Description	Frequency
Notification of Amount of Request (aka Funding Advice)	Reports amount being charged against the customer bank account or request/advise of funding amounts due	Daily
Charged Claim Activity Report	Daily listing of claim charge activity by check/item and member/dependent	Daily
Summary Report for Daily Transfer Evaluation	Displays the claim activities for each bank day in a calendar month	Monthly
Outstanding Report (Section 1 & 2)	Section 1- Lists drafts less than 90 days old that have not cashed; Section 2-Lists members and affected draft items greater than 90 days old that have not cashed	Monthly
Aged Outstanding with Stop Payment Placed	Details in-house stop payments automatically placed on items that remain uncashed 12 months from issuance. <i>The aged items are reported to the customer to include in their unclaimed property filing/escheatment process</i>	Monthly
Issued/Cashed Reconciliation Report	Issued claim payment items vs. cashed items in a policy month	Monthly
Monthly Report of Net Charge Distribution	Displays the charge allocations to the bank account by claim structure	Monthly
Detailed Report for Transfer Evaluation	Details all claim charge items at the member level on a daily basis	Monthly



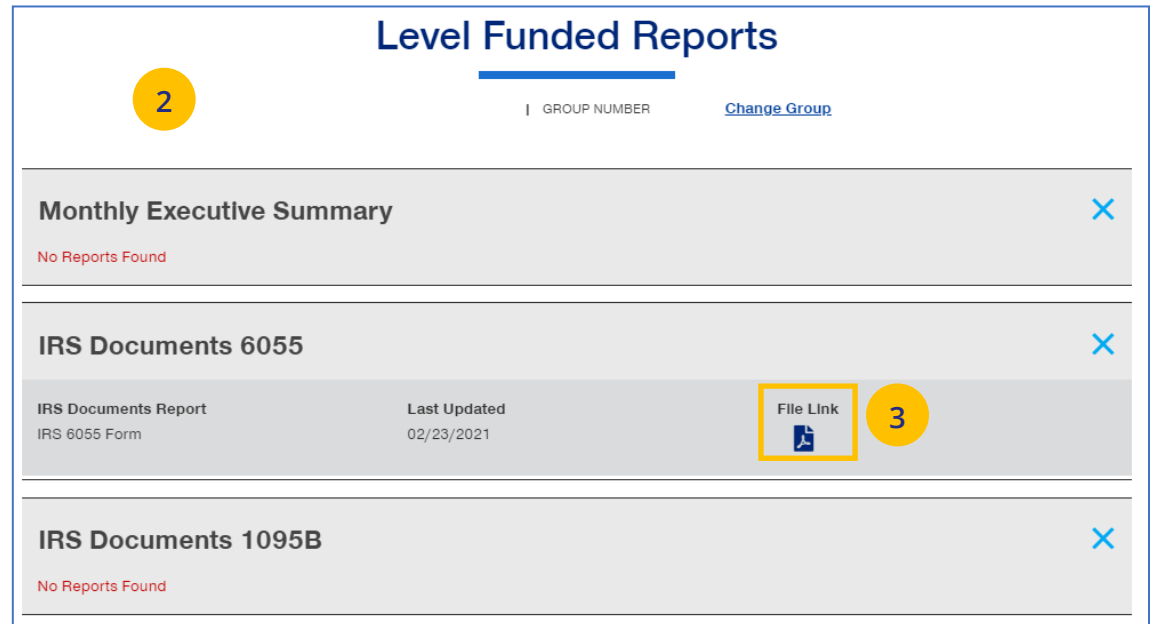
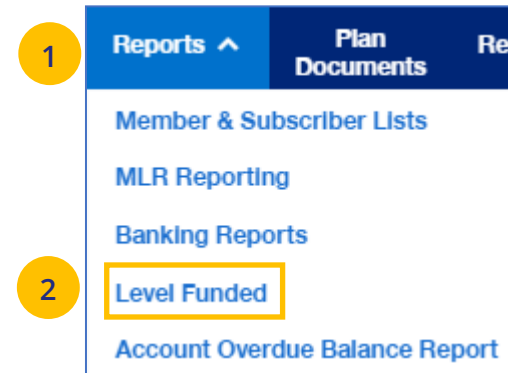
9 | Level Funded

The **Level Funded** reports show the Monthly Executive Summary, the IRS Documents 6055 and IRS documents 1095 B reports.

Note: This report is for Level Funded groups only. The Monthly Executive Report will not display for groups with 0-4 members.

Note: This report is not available for **UnitedHealthcare HMO** users.

1. Click the **Reports** tab.
2. Select **Level Funded**. The **Level Funded Reports** window displays with the available reports for level Funded groups.
3. Click the specific **File Link** to view the report you need.



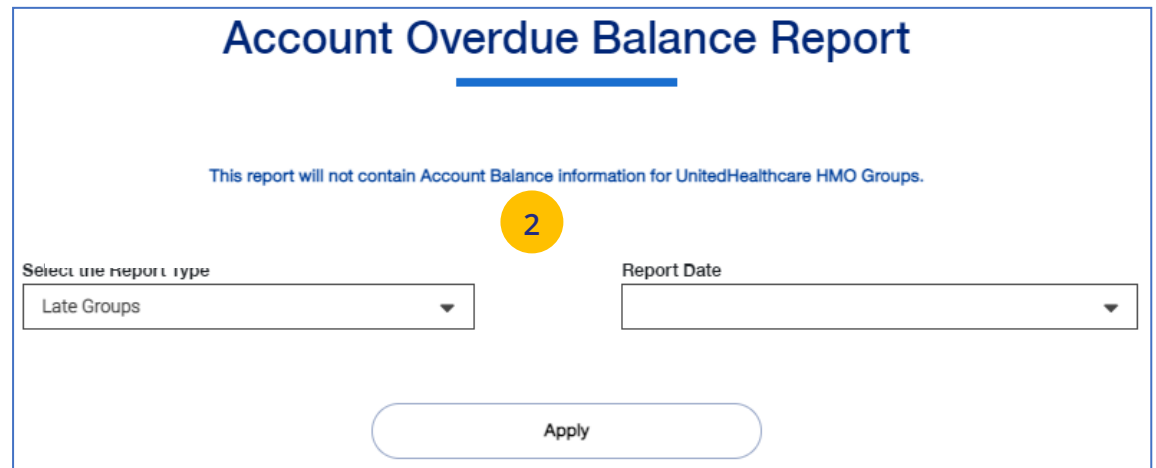
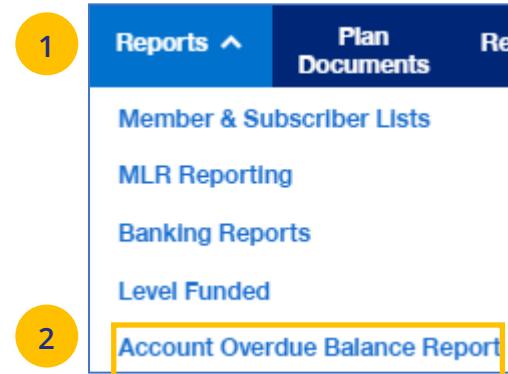
9 | Account Overdue Balance Report

The **Account Overdue Balance Report** shows account balances for a specific date for both late groups and terminated groups.

Note: This report is not available for **UnitedHealthcare HMO** users.

1. Click the **Reports** tab.
2. Select **Account Overdue Balance Report**.

[TABLE OF CONTENTS](#)



A screenshot of the 'Account Overdue Balance Report' form. The title 'Account Overdue Balance Report' is centered at the top. Below the title, a message states: 'This report will not contain Account Balance information for UnitedHealthcare HMO Groups.' Below this message, there are two dropdown menus. The first is labeled 'Select the report type' and has 'Late Groups' selected. The second is labeled 'Report Date' and is empty. A yellow circle with the number '2' is positioned above the 'Report Date' dropdown. At the bottom of the form, there is an 'Apply' button.



9 | Account Overdue Balance Report (continued)

- In the **Select the Report Type** field, select either **Late Groups** or **Terminated Groups**.
- In the **Report Date** field, select the report date. **Note:** At this time, you must select the exact date that a report ran on the current UI.
- Click **Apply**.

Note: The system will look for and display the five most recent late groups or terminations reports for each group the broker is associated.

Note: Download Report – To download the report, click **Download Report**. An alert displays on the message icon when the report is ready.

Note: If no reports are available for the group, a message displays.

Account Overdue Balance Report

[Change Broker](#)

This report will not contain Account Balance information for UnitedHealthcare HMO Groups.

Select the Report Type: (3)

Report Date: (4)

Apply (5)

Report for BKS:PCIS ID 119180 as of 2020-11-03

Download (Download icon)

Results (1)

Navigation: < 1 >

Broker Name	Employer Name	Customer No.	Policy No.	Pending Term Date	Total Past Due Balance	Customer Balance	Past Due Aging				
							0-30 Days	31-60 Days	61-90 Days	91-120 Days	>120 Days
BURROWS ...	Pol_Reg_...	1006860	305402	2021-01-01	\$4,606.76	\$4,606.76	\$4,606.76	\$0.00	\$0.00	\$0.00	\$0.00

Account Overdue Balance Report

[Change Broker](#)

This report will not contain Account Balance information for UnitedHealthcare HMO Groups.

No Termed Group reports available

Select the Report Type:

Report Date:



10 | Plan Documents

The **Plan Documents** gives you access to the following:

- Employer Handbook
- Member Handbook
- Summary Benefit Coverage (SBC)
- View Benefits

Click on the specific link to view the documents.

Note: The documents available for **UnitedHealthcare HMO** users are **Summary of Benefit Coverage (SBC)** and **Schedule of Benefits**.

The screenshot shows the 'Plan Documents' page in a web application. The top navigation bar is dark blue with white text for 'Home', 'Small Group Quoting & Renewals', 'Manage Members', 'Billing & Payment', 'Reports', 'Plan Documents' (highlighted with a yellow box), 'Resources', 'Commissions', 'oxfordhealth.com', and 'Other Applications'. The main content area has a white background with the title 'Plan Documents' in blue. Below the title, it says 'DMS CONSTRUCTION MANAGEMENT | GROUP NUMBER : 1355138 [Change Group](#)'. A disclaimer states: 'For future effective dates, documents will be available on or after plan effective date. If you need a Member or Employer Handbook for Dental or Vision with an effective date of 5/1/21 or later, please contact Client Services for assistance.' There is a filter section with the prompt 'Enter partial or full Plan ID/Description to limit results.' and 'FILTER BY' with a dropdown menu set to 'Description' and a search input field containing 'Description'. Below this is a section titled 'Medical' with a sub-section for 'Plan: 7755083 - ALL ELIGIBLE EES | NY G FRDM NG 25/40/1500/80 PPO 21'. Underneath, there is a 'Coverage Dates' dropdown menu showing '02/01/2021-01/31/2022'. To the right, a yellow-bordered box contains four links: 'Employer Handbook', 'Member Handbook', 'Summary Benefit Coverage', and 'View Benefits'.



10 | View Benefits

The **View Benefits** link allows you to view benefits for a specific plan.

The benefits are listed in alphabetical order. Click on a letter to go to benefits beginning with that letter.

Note: For **Level Funded** groups, you will be able to view the detailed benefits of the plan as well as the programs they offer.

Note: This is not available for **UnitedHealthcare HMO** users.

< Select Plan

View Benefits

GROUP NUMBER : [Change Group](#)

Plan Information

PLAN ID : 10049669 - ALL ELIGIBLE | HP4000
Effective Dates : 12/01/2020-11/30/2021

Apply

Benefits Programs

ALL A B C D E F G H I J K L M N O P Q R S T U V W X Y Z

OR

Search for benefits

3D Mammogram	+
3D Mammogram Professional Component	+
Accidental Dental	+



10 | Summary Benefit Coverage

The **Summary Benefits Coverage** link allows you to view the **Summary of Benefits and Coverage** for each plan.

You can filter the report to show only specific plans or all plans.

Home Small Group Quoting & Renewals Manage Members Billing & Payment Reports Plan Documents Resources Commissions oxfordhealth.com Other Applications

Plan Documents

GROUP NUMBER: [Change Group](#)

For future effective dates, documents will be available on or after plan effective date. If you need a Member or Employer Handbook for Dental or Vision with an effective date of 5/1/21 or later, please contact Client Services for assistance.

Enter partial or full Plan ID/Description to limit results.

FILTER BY

Description Description

Medical

Plan: 7755083 - ALL ELIGIBLE EES | NY G FRDM NG 25/40/1500/80 PPO 21

Coverage Dates: 02/01/2021-01/31/2022

[Employer Handbook](#) [Member Handbook](#) [Summary Benefit Coverage](#) [View Benefits](#)



10 | Member Handbook

The **Member Handbook** link allows you to view the Member Handbook for each plan.

You can filter the report to show only specific plans or all plans.

Home Small Group Quoting & Renewals Manage Members Billing & Payment Reports Plan Documents Resources Commissions oxfordhealth.com Other Applications

Plan Documents

| GROUP NUMBER : [Change Group](#)

For future effective dates, documents will be available on or after plan effective date. If you need a Member or Employer Handbook for Dental or Vision with an effective date of 5/1/21 or later, please contact Client Services for assistance.

Enter partial or full Plan ID/Description to limit results.

FILTER BY

Description Description

Medical

Plan: 7755083 - ALL ELIGIBLE EES | NY G FRDM NG 25/40/1500/80 PPO 21

Coverage Dates: 02/01/2021-01/31/2022

[Employer Handbook](#) [Member Handbook](#) [Summary Benefit Coverage](#) [View Benefits](#)



10 | Employer Handbook

The **Employer Handbook** link allows you to view the Employer Handbook for each plan. You can filter the report to show only specific plans or all plans.

Home Small Group Quoting & Renewals Manage Members Billing & Payment Reports **Plan Documents** Resources Commissions oxfordhealth.com Other Applications

Plan Documents

GROUP NUMBER: [Change Group](#)

For future effective dates, documents will be available on or after plan effective date. If you need a Member or Employer Handbook for Dental or Vision with an effective date of 5/1/21 or later, please contact Client Services for assistance.

Enter partial or full Plan ID/Description to limit results.

FILTER BY
Description Description

Medical

Plan: 7755083 - ALL ELIGIBLE EES | NY G FRDM NG 25/40/1500/80 PPO 21

Coverage Dates
02/01/2021-01/31/2022

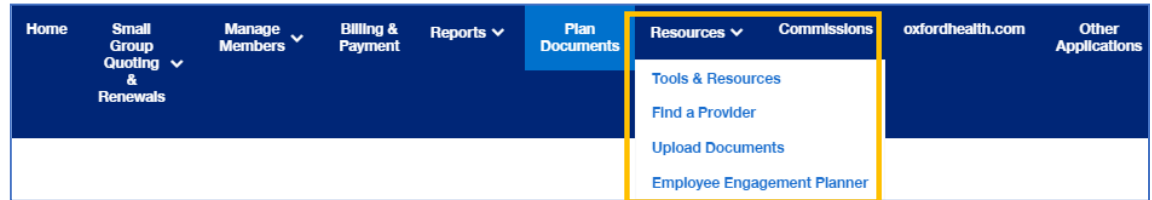
[Employer Handbook](#) [Member Handbook](#)
[Summary Benefit Coverage](#) [View Benefits](#)



11 | Resources

The **Resources** tab provides access to the following:

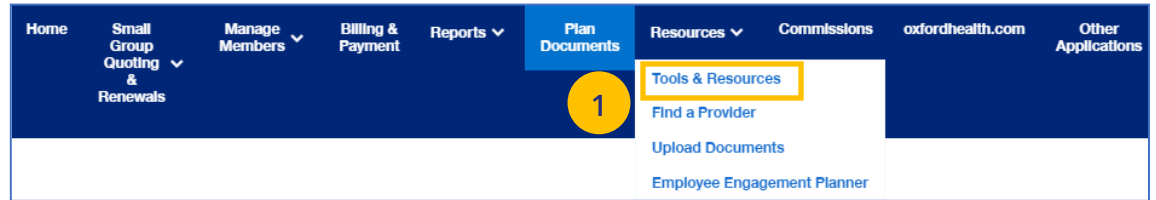
- **Tools & Resources** – Links to helpful tools and resources
- **Find a Provider** – Search for a Provider
- **Upload Documents** – Upload specific documents
- **Employee Engagement Planner** – Calendar and communications used to help employees stay engaged throughout the plan year



11 | Tools & Resources

The **Tools & Resources** link has links to helpful tools and resources that you might need. The documents posted in each category will be updated as needed.

- **Broker Training** – Training schedules and materials specific to your Brokers.
 - **Employer Training** – Training schedules and materials specific to your Employers.
 - **Producer Resources** – Producer resources.
 - **Group Administration** – A group’s administration guide and various forms.
 - **Product Information** – Product brochures and grids.
 - **Employer Materials** – Worksite wellness and employer marketing materials.
 - **Federal & State Notices** – Federal and state communications.
 - **FAQs** – Answers to frequent questions.
 - **Contact Us** – Contact information.
 - **Useful Links** – Includes link to United for Reform Resource Center.
 - **Medical & Admin Policies** – Links to documents related to Medical and Administrative policies.
 - **Quoting & Enrollment Forms** – Available forms for each state.
1. Click the **Tools & Resources** link. The **Tools & Resources** screen displays.



11 | Find a Provider

The **Find a Provider** tab allows you to search for a provider for a specific plan.

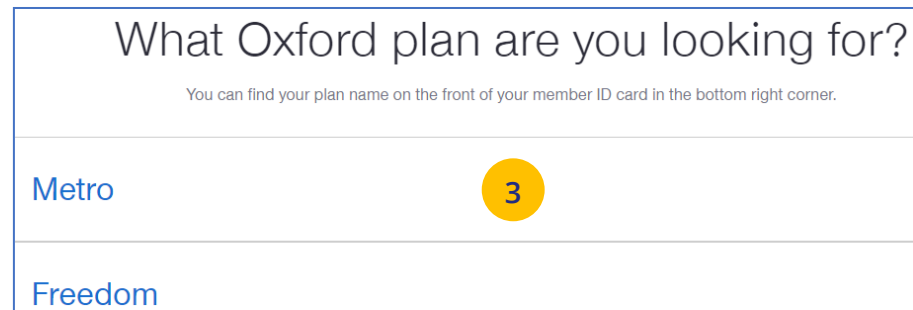
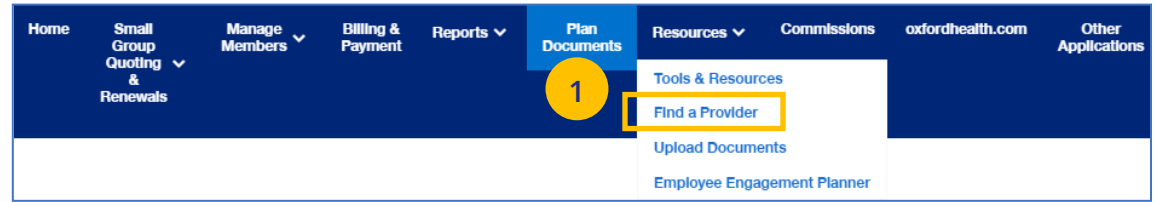
Note: If you have not entered a Group Number previously, you will be asked to search for and find your Group prior to requesting materials.

Find a Provider: Oxford

1. Click **Find a Provider**. The **Provider Search** screen displays.

Note: The subsequent screens will vary based on the selection you make.

2. Click **Oxford**.
3. Select the Oxford plan you are looking for.



11 | Find a Provider (continued)

4. Enter the location of your provider and click Continue.
5. Enter the type of provider and click Search. A list of providers will be shown. You can filter the results if needed.

What location do you want to find a provider in?

Enter a street address, city & state or 5 digit zip code.

4

[CONTINUE](#)

What type of **Medical Care** can we help you find near:

Birmingham, AL
[CHANGE LOCATION](#)

5

Search by provider, service, or condition [SEARCH](#)

CHOICE PLUS CHANGE PLAN >

[←](#) Results for **All Primary Care Providers** 5 [NEW SEARCH](#)
Office Visit - Primary Doctor - Established Patient - Low Complexity [VIEW MAP](#)
Total average cost in your area: \$44 - \$69


✓ 1357 **In-Network Providers** Found Near 35203 [Reset Results](#) SORT RESULTS BY: [PREFERRED PROVIDERS](#)

Filter Results by Provider Name [FILTER](#)

Refine Results
Changing a search results filter will reload the page immediately.

LOCATION [-](#)

WHERE
Birmingham, AL

 **Crenshaw, James H, MD**
Internal Medicine

With the spread of COVID-19, please call your provider's office before you go to confirm their availability, location, service options—including telemedicine—and any precautions you should take.

Any cost information on this page is an estimate only. See more information below about participating providers, available services and these estimates.



11 | Find a Provider (continued)

Find A Provider: Level Funded

1. Select **Find a Provider**.
2. Click **Level Funded**.
3. Select the state where your provider resides.
4. Select a plan in the specific state.

Resources ▾

Tools & Resources

Find a Provider 1

Provider Search (X)

United Healthcare Oxford

United Healthcare Level Funded 2

United Healthcare UnitedHealthcare HMO

United Healthcare United Healthcare Freedom Plans

In what state are you looking for a provider?

Alabama 3

Alaska

Select a plan in Alabama.

Charter

Choice 4

Choice Plus

Navigate



11 | Find a Provider (continued)

5. Enter the location of your provider and click Continue.
6. Enter the type of provider and click Search. A list of providers will be shown. You can filter the results if needed.

What location do you want to find a provider in?

Enter a street address, city & state or 5 digit zip code.

5

CONTINUE

What type of **Medical Care** can we help you find near:

Birmingham, AL
CHANGE LOCATION

6

Search by provider, service, or condition **SEARCH**

CHOICE PLUS CHANGE PLAN >

Results for **All Primary Care Providers** 6

Office Visit - Primary Doctor - Established Patient - Low Complexity
Total average cost in your area: \$44 - \$69

NEW SEARCH
VIEW MAP

1357 In-Network Providers Found Near 35203 Reset Results SORT RESULTS BY: PREFERRED PROVIDERS


Filter Results by Provider Name **FILTER**

Refine Results

Changing a search results filter will reload the page immediately.

LOCATION —

WHERE
Birmingham, AL

 **Crenshaw, James H, MD**
Internal Medicine

With the spread of COVID-19, please call your provider's office before you go to confirm their availability, location, service options—including telemedicine—and any precautions you should take.

Any cost information on this page is an estimate only. See more information below about participating providers, available services and these estimates.



11 | Find a Provider (continued)

Find A Provider: UnitedHealthcare HMO

1. Select **Find a Provider**.
2. Click **UnitedHealthcare HMO**.
3. Select the state where your provider resides.
4. Select a network in the state you selected.

Resources ▾

- Tools & Resources
- Find a Provider**

Provider Search (X)

- United Healthcare Oxford
- United Healthcare Level Funded
- United Healthcare HMO**
- United Healthcare Freedom Plans

To search for doctors, clinics or facilities, choose the state where you live

You'll then choose a health plan to help refine your search.

- California
- Oklahoma
- Oregon
- Washington

Select a network in California

- SignatureValue Advantage HMO
- SignatureValue Alliance HMO



11 | Find a Provider (continued)

5. Enter the location of your provider and click **Continue**. A **Primary Care Provider Information** screen displays. Click **Continue** again.
6. Enter the type of provider and click **Search**. A list of providers will be shown. You can filter the results if needed.

Enter a zip code or city in California to refine your provider search

5

Enter a street address, city & state or 5 digit zip code.

Street Address, City & State, Zip Code

CONTINUE

What type of **Medical Care** can we help you find near:

Los Angeles, CA
CHANGE LOCATION

6

Search by provider, service, or condition

SEARCH

CHOICE PLUS CHANGE PLAN >

< Results for **All Primary Care Providers** 6

Office Visit - Primary Doctor - Established Patient - Low Complexity
Total average cost in your area: \$44 - \$69

NEW SEARCH
VIEW MAP

1357 **In-Network Providers** Found Near 35203 [Reset Results](#) SORT RESULTS BY: PREFERRED PROVIDERS

Filter Results by Provider Name FILTER

Refine Results


Changing a search results filter will reload the page immediately.

With the spread of COVID-19, please call your provider's office before you go to confirm their availability, location, service options—including telemedicine—and any precautions you should take.

Any cost information on this page is an estimate only. See more information below about participating providers, available services and these estimates.

LOCATION -

WHERE
Birmingham, AL

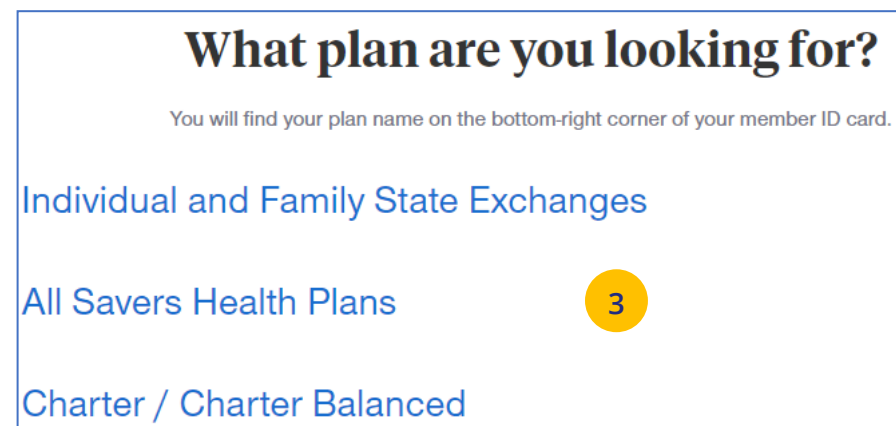
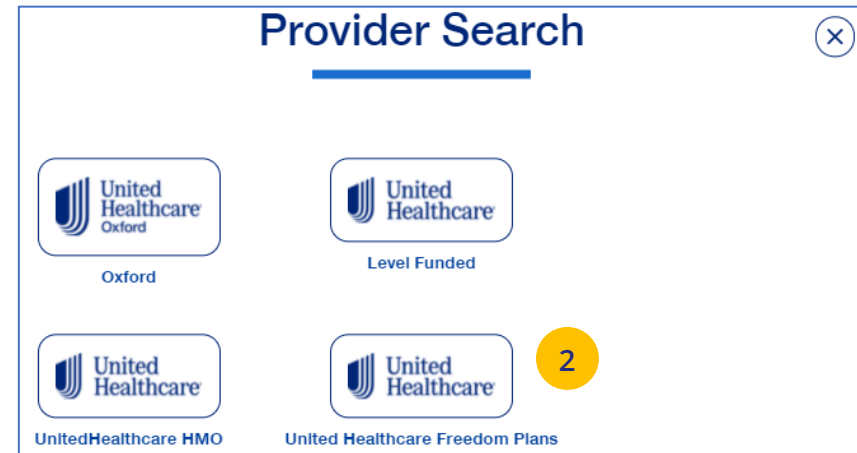
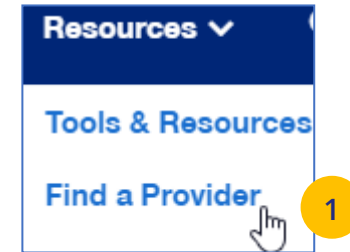
 **Crenshaw, James H, MD**
Internal Medicine



11 | Find a Provider (continued)

Find A Provider: UnitedHealthcare Freedom Plans

1. Select **Find a Provider**.
2. Click **UnitedHealthcare Freedom Plans**.
3. Select the plan you need.



11 | Find a Provider (continued)

4. Select **Individual and Family** or **SHOP (Small Business Health Plan Options Program)**.
5. Select the specific state you need.
6. Select the network in your state.

Which type of Health Insurance Marketplace?

This website is not the Health Insurance Marketplace website. This website is designed to provide you with resources to help you find network providers.



Individual and Family
Choose this for yourself or your dependents

SHOP (Small Business Health Options Program)
Choose this for your business

4

In which state do you live?

Arizona

Maryland

Massachusetts



5

Select a network in Arizona

AZ Compass HMO [↗](#)

AZ Compass HMO



6



11 | Find a Provider (continued)

7. Enter the location of your provider and click **Continue**. A **Primary Care Provider Information** screen displays. Click **Continue** again.
8. Enter the provider search criteria and click **Search**. A list of providers will be shown. You can filter the results if needed.

What location do you want to find a provider in?

Enter a street address, city & state or 5 digit zip code.

7

Continue

What type of **Medical Care** can we help you find near:

Los Angeles, CA
[CHANGE LOCATION](#)

8

Q SEARCH

<

Search Results

8

Q Search

Refine Results

Changing a search results filter will reload the page immediately.

- All Results (37)
- Health Care Professionals (6)
- Clinics and Facilities (27)

37 Results for 'primary health, primary health care' Near 85004

With the spread of COVID-19, please call your provider's office before you go to confirm their availability, location, service including telemedicine—and any precautions you should take.

H

Federally Qualified Health Center (FQHC)

Specialty

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102

11 | Upload Documents

The **Upload Documents** tab allows you to select and upload a specific document. **This only applies if you have permission to upload documents.**

Note: Access to **Upload Documents** is available only to those with Internal Portal Admin, Underwriting, Internal Sales, Broker Lead, Broker User and Employer Lead roles.

Note: If you have not entered a Group Number previously, you will be asked to search for and find your Group prior to requesting the document.

1. Click the **Upload Documents** link. The **Upload Documents** screen displays.

Note: A message displays at the bottom of the screen with a link that allows you to check group eligibility.

The screenshot shows the 'Upload Documents' page in the oxfordhealth.com portal. The top navigation bar includes links for Home, Small Group Quoting & Renewals, Manage Members, Billing & Payment, Reports, Plan Documents (highlighted with a yellow circle and the number 1), Resources, Commissions, oxfordhealth.com, and Other Applications. A dropdown menu under 'Plan Documents' shows 'Tools & Resources', 'Find a Provider', 'Upload Documents' (highlighted with a yellow box), and 'Employee Engagement Planner'. The main content area is titled 'Upload Documents' and features a 'GROUP NUMBER' field with a 'Change Group' link. Below this, a message states: 'Please select a document name and browse your computer for your file. You may upload five documents at a time.' There are two input fields: 'Document Name *' with a dropdown menu showing 'Select One', and 'Select Document for Upload *' with a file selection area showing 'No file chosen...'. At the bottom right, there is an 'Add Row +' button. Two buttons, 'Clear Selections' and 'Upload', are centered at the bottom. A footer message reads: 'To check your verification click [here](#) ↗. If you have recently submitted information, please allow up to 5 business days for us to process your information and update your status.'



11 | Upload Documents (continued)

2. Use the **Document Name** drop-down to select the document you need to upload.
3. Click the **Select Document for Upload** box and attach the document for upload. Repeat this if needed by clicking **Add Row**. You can upload up to five documents at one time.
4. Click **Upload**. A “successfully uploaded” confirmation message will display.

The screenshot illustrates the document upload process in three stages:

- Step 2:** A dropdown menu for "Document Name" is open, showing a list of document types. "Employer Information Form" is highlighted. A yellow circle with the number "2" is next to the dropdown.
- Step 3:** The "Document Name" dropdown is set to "1099 Attestation Form". The "Select Document for Upload" field contains a file named "Decision 2.jpg". A yellow circle with the number "3" is next to the file selection area. An "Add Row" button is visible at the bottom right.
- Step 4:** The "Document Name" dropdown is still "1099 Attestation Form" and "Decision 2.jpg" is selected. The "Upload" button is highlighted. A yellow circle with the number "4" is next to the "Upload" button. Below the "Upload" button, a confirmation message reads: "Document Decision 2.jpg successfully uploaded as 1099 ATTESTATION FORM. Document ID: 0902b2da80189d0c". A "Clear Selections" button is also visible.

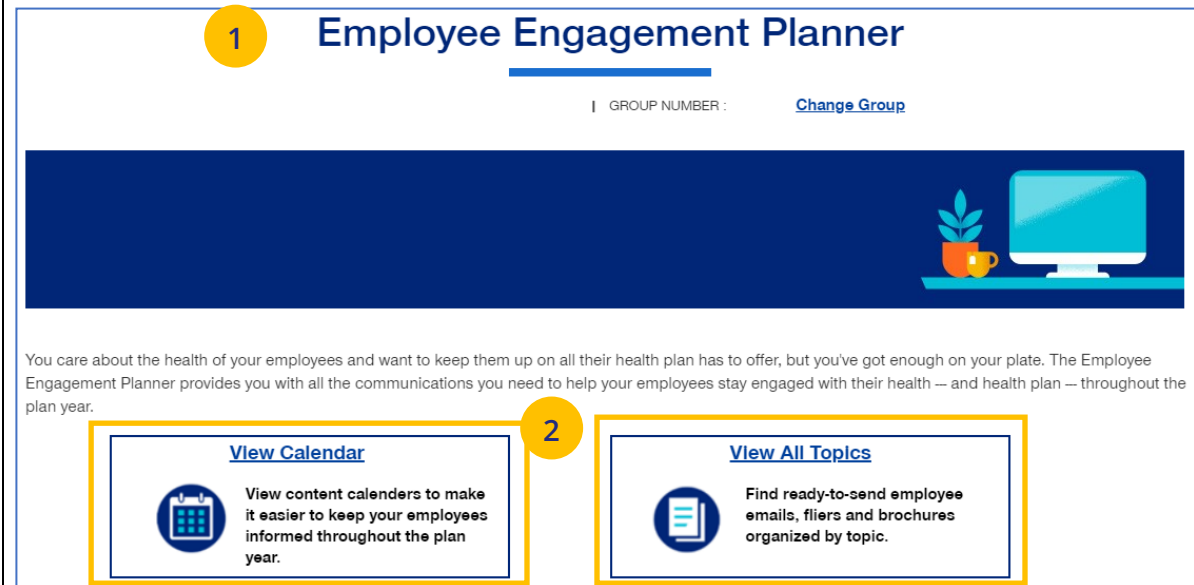
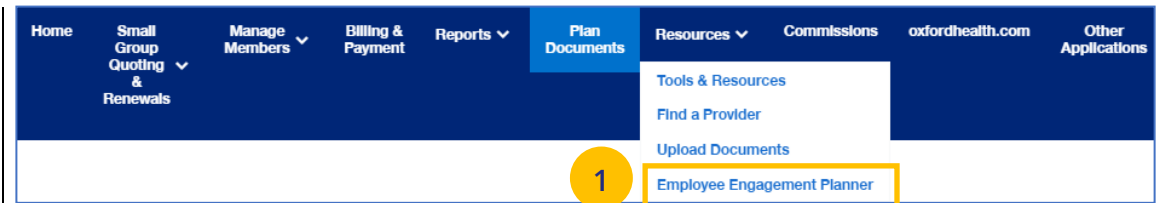


11 | Employee Engagement Planner

The **Employee Engagement Planner** allows you to view a calendar and documents that can be sent to employees to keep them informed.

Note: The **Employee Engagement Planner** is not used by **UnitedHealthcare HMO** users.

1. Click the **Employee Engagement Planner** tab. The **Employee Engagement Planner** screen displays.
2. Click **View Calendar** or **View All Topics**.



11 | Employee Engagement Planner (continued)

3. **View Calendar** – Select a group to see documents based on group brand and effective date. Important communications that can be downloaded and sent to employees.

The screenshot shows the 'Calendar' interface for 'MILESTONES BEHAVIORAL SERVICES INC.' with group number '1046476'. The calendar is for 'June 2021' and is currently in 'month' view. The interface includes a sidebar for filtering by brand and effective date, and a main calendar grid with event overlays.

Calendar 3

MILESTONES BEHAVIORAL SERVICES INC. | GROUP NUMBER : 1046476 [Change Group](#)

The calendar makes it easier to keep employees informed on the most important topics throughout the plan year. Select your group to automatically display communications on a variety of topics. You can save your group's calendar to your favorites for future use. Click on the calendar event to access and download the communications to send out to employees.

MILESTONES B... x JUN01'21-UHC x

Add New Calendar

Select Brand

- UnitedHealthcare
- Oxford
- UnitedHealthcare Level Funded

Select Effective Date

Please Select

When selecting multiple filter options, select Apply.

Apply Reset

June 2021

Sun	Mon	Tue	Wed	Thu	Fri	Sat
30	31	1	2	3	4	5
			UHC Welcome Brochure			
6	7	8	9	10	11	12
		UHC Premium Designation				
13	14	15	16	17	18	19
	UHC myUHC.com					
20	21	22	23	24	25	26
	UHC Optum RX					
27	28	29	30	1	2	3
			UHC Cost of Care			



11 | Employee Engagement Planner (continued)

4. **View All Topics** - Links to topics that can be shared with employees.

When you click on a topic, you will see filters that allow you to download topics in different formats (brochure, email, flier) when available.

View All Topics 4

Select the topic you're interested in to find communications to share with employees.

Before the Plan Begins

- Waiting for Coverage to Start
- Getting Started Checklist

Help Employees Understand Their Plan

- Health and wellness programs
- Ways to access care
- Ways to access their health plan
- Ways to lower costs
- ER Redirection

Welcome Employees

- Welcome Brochure
- Premium Designation Program
- OptumRx®

Seasonal Reminders

- Flu Shots
- Annual Checkups

View All Topics Category

Filter Options

Category Type

Brochure

Email

Flier

Select All

Product Brand

UnitedHealthcare

Oxford

UnitedHealthcare Level Funded

States

Connecticut

New York

New Jersey

Select All

Apply
Reset

Before the Plan Begins

UHC New Member Checklist

5 steps for your employees to take after getting their health plan ID card.

Choose a Communication Type:

Flier
Email

4

UHC Waiting For Coverage to Start

Actions your employees can take before their health plans begin.

Choose a Communication Type:

Flier
Email

Oxford New Member Checklist

5 steps for your employees to take after getting their health plan ID card.

Choose a Communication Type:

Flier
Email

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107

12 | Commissions

The **Commissions** tab is used to search for and display a broker's commissions.

1. Click the **Commissions** tab. The **Commissions** screen displays.
2. Enter the Year and Month and click **Apply**. The available commission statements will display.
3. You can export a statement to either PDF or Excel.

Note: If **All Savers** commission statements are available, a link to uhone.com will be shown. There is also a link to United eServices (UeS).

Note: How to read your statement – Click on the How to read your statement link to view a description of the statement and how to read it.

Note: For **UnitedHealthcare HMO** users, the commissions statement prefix will be "UHCOFCA."



The **oxfordhealth.com** tab takes you directly into the oxfordhealth.com legacy platform.

Note: This does not apply for **UnitedHealthcare HMO** users.

The screenshot displays the oxfordhealth.com web application interface. At the top, a dark blue navigation bar contains the following menu items: Home, Small Group Quoting & Renewals, Manage Members, Billing & Payment, Reports, Plan Documents, Resources, Commissions, **oxfordhealth.com** (highlighted with a yellow box), and Other Applications. Below this is a secondary navigation bar with Brokers, My Account, Transactions, Tools & Resources, and Search. The main header features the UnitedHealthcare Oxford logo and a banner image of three people. A 'Welcome' message is displayed with a text input field for the user's name and an 'Oxford ID' field. The main content area is organized into three columns:

- Business Center:** Includes a search section with three dropdown menus: '1. Select state' (set to New York), '2. Select group size' (set to Small (100 and Under)), and '3. Select search criteria' (set to Forms). A 'SEARCH' button is located below these menus. Below the search section is a 'Broker Resources' section with links to 'View our Counties Map for Oxford Commercial In-Area Product Enrollment' and 'Producer Performance Guide - 2018'. There are also two informational paragraphs: one for Oxford 1.0 (NY and NJ fully insured employer groups) and one for Oxford 2.0 (CT fully insured employer groups).
- Broker Highlights:** A list of news items with expandable arrows, including: 'Announcing the UnitedHealthcare Community Care Award', 'NY Rate Filings Broker eBulletin', 'NY Rate Filings: Initial notices to be mailed in June 2018 to impacted groups, subscribers and individuals renewing in 2019', 'July 1, 2018 PDLs for New York and New Jersey Clients', 'Suspension of Health Insurer Provider Fee in Connecticut', 'New Optum ID Login Process on Oxfordhealth.com', 'Healthy Savings Available This Month', 'Emergency Room Follow-Up Care Will No Longer Be Reimbursed as a Covered Expense', 'Remind Your Oxford Clients to Have Their Employees Access Rally', 'Expanded Oxford Garden State Network Access', 'New Billing and Payment Option for OBM Plans', 'Transitional Relief Coverage May No Longer Be Available', 'Waterbury Hospital's Network Participation', 'Connecticut MLR Disclosure to Insurance Applicants eBulletin', 'More Options for Connecticut Employers', 'New York Small Business Q1 2018 Rates and Network Options', and 'Now is a great time to explore your options with Oxford' (with an expandable arrow to 'Archive Highlights').
- Idea Management System:** Includes a 'Commissions Department Forms' section with a 'Select One' dropdown menu. Below the dropdown is a text prompt: 'For a copy of the Oxford Broker (Agent/Agency) Agreement, please email your request to: OxProducerComp@uhc.com'.



14 | Other Applications


The **Other Applications** tab provides direct links to United eServices (UeS) and Employer eServices (EeS).

Home Small Group Quoting & Renewals Manage Members Billing & Payment Reports Plan Documents Resources Commissions oxfordhealth.com **Other Applications**

Other Applications

◀ 1 ▶

Employer eServices



Market
Alabama, Alaska, Arizona, Arkansas, California, Colorado, Connecticut, Delaware, Florida, Georgia, Hawaii, Idaho, Illinois, Indiana, Iowa, Kansas, Kentucky, Louisiana, Maine, Maryland, Massachusetts, Michigan, Minnesota, Mississippi, Missouri, Montana, Nebraska, Nevada, New Hampshire, New Jersey, New Mexico, New York, North Carolina, North Dakota, Ohio, Oklahoma, Oregon, Pennsylvania, Rhode Island, South Carolina, South Dakota, Tennessee, Texas, Utah, Vermont, Virginia, Washington, West Virginia, Wisconsin, Wyoming

Product
Basic Life, Dental, Long Term Disability(LTD), Medical, Short Term Disability(STD), Vision

Carrier
UnitedHealthcare

Functionality
Enrollment

Funding Type
Fully Insured

[Go to Employer eServices](#)



Appendix: Broker Roles and Permissions

TABLE OF CONTENTS

Function	Broker Lead with User Maintenance	Standard Broker with Commissions	Standard Broker without Commissions	Broker View Only	Broker Content Only	Baseline Broker with Quote, Renewal, Commissions	Baseline Broker with Quote and Commissions	Baseline Broker with Quote	Baseline Broker with Renewal and Commissions	Baseline Broker with Renewal	Baseline Broker with Commissions	Baseline Broker with Quote and Renewal
Invite Broker users	Y	N	N	N	N	N	N	N	N	N	N	N
Invite a Broker user as a Lead or assign an existing Broker as	Y	N	N	N	N	N	N	N	N	N	N	N
View and update a Broker	Y	N	N	N	N	N	N	N	N	N	N	N
Disable a Broker user's	Y	N	N	N	N	N	N	N	N	N	N	N
View Subscriber and Member	Y	Y	Y	Y	N	N	N	N	N	N	N	N
View plan documents and benefits for an Employer group	Y	Y	Y	Y	N	N	N	N	N	N	N	N
Invite Employer users	N	N	N	N	N	N	N	N	N	N	N	N
View and update an Employer user's profile	N	N	N	N	N	N	N	N	N	N	N	N
Disable an Employer user's	N	N	N	N	N	N	N	N	N	N	N	N
Invite an Employer user as a Lead, or assign an existing	N	N	N	N	N	N	N	N	N	N	N	N
View existing members within an Employer group	Y	Y	Y	Y	N	N	N	N	N	N	N	N
Enroll new members within an Employer group	Y	Y	Y	N	N	N	N	N	N	N	N	N
Update existing members within an Employer group	Y	Y	Y	N	N	N	N	N	N	N	N	N
Terminate existing members within an Employer group	Y	Y	Y	N	N	N	N	N	N	N	N	N
Print or order a member's ID	Y	Y	Y	Y	N	N	N	N	N	N	N	N
Quote new business (UeS, Project X, All Savers, Quick	Y	Y	Y	Y	N	Y	Y	Y	N	N	N	Y
View Commissions page	Y	Y	Y	Y	N	Y	Y	N	Y	N	Y	N
View MLR reports	Y	Y	Y	Y	N	Y	Y	Y	Y	Y	Y	Y
Access to the Billing and Payment page and ability to	Y	Y	Y	Y	N	N	N	N	N	N	N	N
View Member and Employee	Y	Y	Y	Y	N	Y	Y	Y	Y	Y	Y	Y
Renew existing business, view renewal packages for Employer groups with	Y	Y	Y	Y	N	Y	N	N	Y	Y	N	Y
Upload a document via the Upload Document screen	Y	Y	Y	Y	Y	N	N	N	N	N	N	N
View Banking Report	Y	Y	Y	Y	Y	N	N	N	N	N	N	N
View Account Overdue Balance	Y	Y	Y	Y	Y	N	N	N	N	N	N	N
View Level Funded Report	Y	Y	Y	Y	Y	N	N	N	N	N	N	N



Appendix: Employer Roles and Permissions

[TABLE OF CONTENTS](#)

Function	Employer Lead	Employer User	Employer View Only	Employer View Only with Member Handbook Only	Employer View Only with Employer Handbook Only
Invite employer users	Y	N	N	N	N
Invite an employer user as a Lead or assign an existing employer as Lead	Y	N	N	N	N
View, update and disable an employer user's profile	Y	N	N	N	N
View Member and Subscriber lists	Y	Y	Y	Y	Y
View plan documents and benefits for an employer group	Y	Y	Y	Y	Y
View members within an Employer group	Y	Y	Y	Y	Y
Enroll members within an Employer group	Y	Y	N	N	N
Update members within an Employer group	Y	Y	N	N	N
Terminate members within an Employer group	Y	Y	N	N	N
Print or order a member's ID Card	Y	Y	N	Y	N
Quote new business (UeS, Project X, All Savers, Quick Quote)	Y	Y	Y	N	N
View Commissions page	Y	Y	Y	N	N
View MLR reports	N	N	N	N	N
Access to the Billing and Payment page and ability to view bills	Y	Y	Y	N	Y
View Member Handbook	Y	Y	Y	Y	N
View Employee Handbook	Y	Y	Y	N	Y
View renewal packages for Employer groups with upcoming renewals	Y	N	N	N	N
Renew existing business	N	N	N	N	N
Upload a document via the Upload Document screen	Y	Y	N	N	N
View Banking Report	Y	Y	Y	N	N
View Account Overdue Balance Report	N	N	N	N	N
View Level Funded Report	Y	Y	N	N	N
View Payment Integrity Report	Y	Y	N	N	N

