Your guide to uhceservices.com

How to use this go-to resource to support your UnitedHealthcare Level Funded business.

A better digital experience

Welcome to **uhceservices.com**, the self-service website for Level Funded medical benefits administration support.

Features include:

- Up-to-date infrastructure and tools
- Secure encryption
- Automatic registration for brokers and benefits administrators
- Single sign-on integrations with other Optum® ID-powered websites
- Integrated, real-time broker, plan sponsor and plan participant information
- User and permissions level-specific content
- Access to the business quote and enrollment tool

Enhancements make it easier to:

1. **Delegate access to others.** Information is accessed according to user role (broker or plan sponsor) and permissions levels.
2. **Find plan participants faster.** Search using plan participant identification or Social Security numbers, in addition to first name and last name.
3. **Get a website demo.** Learn more about the features and functions.
4. **Get support.** Get answers to your questions or request information.

United Healthcare

Watch your email for an invitation to register

Brokers appointed to conduct Level Funded business will receive an email invitation from us to complete an initial registration. Employers (e.g., benefits administrators[1]) new to the website will also be invited to register for access via an email invitation once the group has been activated before their policy effective or renewal date.

When you receive the email:

- Click the **Register Now** link in the email
- Sign in with your Optum ID username and password; if you do not yet have an Optum ID, click **Create an Optum ID** and follow the prompts
- View the online Help tutorial for a quick tour of the website, including how to establish a delegate(s) and permissions to grant access to others as needed

Manage user roles and permissions

Accessibility to all functions and information on the website is based on user login credentials, which are categorized as either broker or representative of the plan sponsor group.

Brokers have access to information pertinent to supporting the broker-client relationship, with the ability to delegate certain permissions to credentialed colleague(s) or administrative assistant(s) for the purpose of assisting clients.

One person in each plan sponsor group has Master Administrator access to the site, with the ability to assign controls and access privileges, designating the types of information available for each user.

Explore key functions

For plan sponsor group clients:

- Review annual policy renewals, look up plan benefit information and access plan documents
- Manage eligibility with same-day processing:
  - Add, terminate, reinstate, inquire or change a plan participant's status
  - View plan participant count
  - Get adjusted invoices 48 hours after online eligibility changes
- Request plan participant lists and health plan ID cards
- Electronic billing:
  - View current and prior-period invoices, current balance and payment history
  - Download invoices and make online payments
  - Request adjustment invoices after enrollment updates
- Conduct a network provider search
- Find important forms and key marketing materials

For brokers:

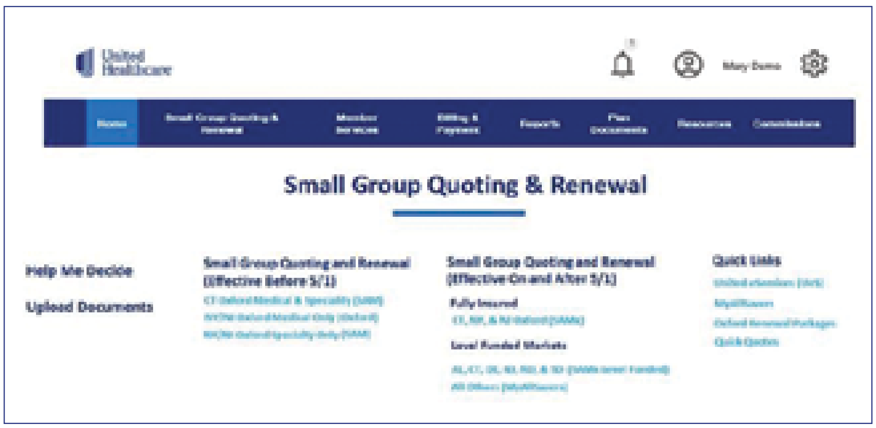
- Quote and Install groups using the Sales Automation Management (SAMx) – Level Funded tool
- Access and manage annual policy renewals — and review, download and email clients' renewal packages (small group only)
- Check your commissions
- Enroll and manage plan participant eligibility, which includes a family enrollment option
- Request plan participant lists
- Request replacement ID cards
- Review client billing information
- Find important business forms and key marketing materials

Meet SAMx – Level Funded, your quoting and enrollment tool

To quote and enroll a Level Funded plan, you'll use the SAMx – Level Funded tool, which is available through **uhceservices.com**.

You can access SAMx – Level Funded in 2 ways:

1. Select the **Quoting & Renewals** tab in the upper left navigation bar and select **SAMx – Level Funded**.
2. Click on the **Help Me Decide** button and enter the quoting region criteria (ZIP Code, Effective Date, Funding Type) to direct you to the appropriate quoting tool.



Quick navigation. Seamless process.

Use the navigation bar to get to frequently used information such as:

- Billing and payments
- Commissions
- Quoting and renewals

Quickly access the tools you need to complete administrative tasks and support your clients by selecting the corresponding icon in the **Management Tools** box on your dashboard:

- **Member Search:** Search by name, plan identification number or Social Security number
- **Enroll Member:** Enroll new plan participants, including dependents, on a client's behalf
- **View & Pay Bill:** Check a client's monthly premium bill and payment status
- **Manage Quotes:** View your Level Funded clients' quotes; access SAMx – Level Funded tool
- **View Benefits:** Access the plan documents page, which includes a link to view your client's specific benefits

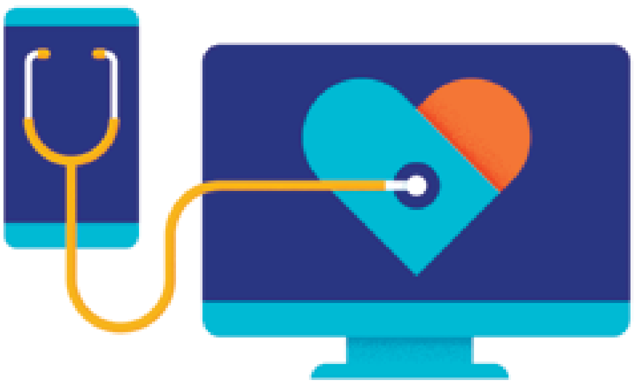
For more information and support, select the **Resources** tab in the upper navigation bar and click **Tools & Resources.**

Save time with real-time data integration

You'll spend less time and effort entering data because **uhceservices.com** uses a fully integrated system. Enter information once, and it'll flow across all key areas, populating in all pertinent locations. What's more, authorized users—like HR staff, plan participants and physicians—can access that information almost immediately.

For example, when you update eligibility information through **uhceservices.com**:

- Plan participants who are registered on their self-service member website, **myuhc.com**®, can access their benefits immediately. They can also print a copy of the ID card, get information on health conditions and find a network doctor.
- Network physicians and health care facilities have access to the latest eligibility information, which may translate to an improved service experience and fewer potential claim issues
- You'll find faster, more accurate reports and billing



Ready to get started?

Register at **uhceservices.com** as soon as you receive your invitation email. Then, you can create additional access to your account by establishing delegate(s) and permissions levels.

Questions?

Contact your UnitedHealthcare sales representative or call Client Services at **1-877-797-8816**.

[1] Emails will be issued to the contact for the plan sponsor group client for whom we have an email address on file (plan sponsor application) – often, the benefits administrator – and to the client's broker of record.

United Healthcare