Your guide to uhceservices.com

A better digital experience

Welcome to **uhceservices.com**, the new self-service website for your medical benefits administration needs. This site has features and functionality—in an easier-to-use format.

Features include:

- Access to California HMO membership
- Modern infrastructure and tools
- Secure encryption
- Automatic registration for brokers and benefits administrators
- Single sign-on integrations with One Healthcare ID (OHID)-powered websites
- Integrated, real-time broker, employer and member information
- User and permissions level-specific content
- Access to the small group business quote, enrollment and renewal tool

Watch your email for an invitation to register

Brokers appointed to conduct UnitedHealthcare business will receive an email invitation from us to complete an initial registration on the website. Employers (e.g., benefits administrators*) new to the website will also be invited to register for access. We will send them an email invitation 60–75 days before their policy effective or renewal date.

New enhancements make it easier to:

1 Delegate access to others
Information is accessed according to user role (broker or employer) and permissions levels

2 Find members faster (including HMO members)
Search using member 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

When you receive the email invitation to register:

- Click the **Register Now** link in the email
- Sign in with your One Healthcare ID username and password
- 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

If you do not yet have a One Healthcare ID, click **Create a One Healthcare ID** and follow the prompts
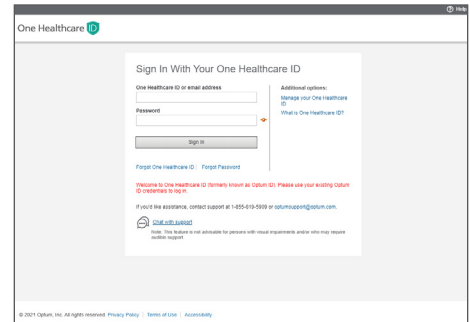
Manage user roles and permissions

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 employer 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 employer 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.

For brokers:

- Quote, install and renew small business groups using the Sales Automation Management (SAM) tool
- Access and manage annual policy renewals and review, download and email clients' renewal packages (small group only)
- Check your commissions
- Enroll and manage member eligibility, which includes a family enrollment option
- Request subscriber/member lists
- Request replacement health plan ID card
- Review client billing information
- Find important business forms and key marketing materials

For employer group clients:

- Review annual policy renewals and look up plan benefit information and access plan documents
- Manage eligibility with same-day processing:
  - Add, terminate, reinstate, inquire or change an employee's status
  - View employee count
  - Online eligibility changes are processed on the next generated invoice
- Request subscriber/member lists and ID cards
- Electronic billing:
  - View current and prior-period invoices, current balance and payment history
  - Download invoices and make online payments
- Conduct a network provider search
- Find important forms and key marketing materials

Meet SAM, your new management tool

To quote, enroll and renew your fully insured small group (1–50) client's UnitedHealthcare plan, you'll use the Sales Automation Management (SAM) tool, which is available through **uhceservices.com**.

SAM replaces the Idea Management System® (IDEA) tool for fully insured small group businesses with policy effective dates of October 2021 and beyond.

If you've managed quotes, enrollments and renewals for UnitedHealthcare employer group clients through **UnitedeServices.com**, you're already familiar with SAM.

You can access SAM 2 ways:

1. Select the **Quoting & Renewals** tab in the upper left navigation bar
2. Click on the **Manage Quotes** icon in the **Management Tools** box.

Both of these options will lead you to the United eServices® home page. Click the **SAM** button, and you're in.

Need access to United eServices? Click on **Register Here** under the **Log In** button.

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 members, including dependents, on a client's behalf

• **View and pay bill:** Check a client's monthly premium bill and payment status

• **Manage quotes:** View your small- and large-group clients' quotes and renewals; access SAM

• **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 **Tools & Resource**s box on your dashboard.
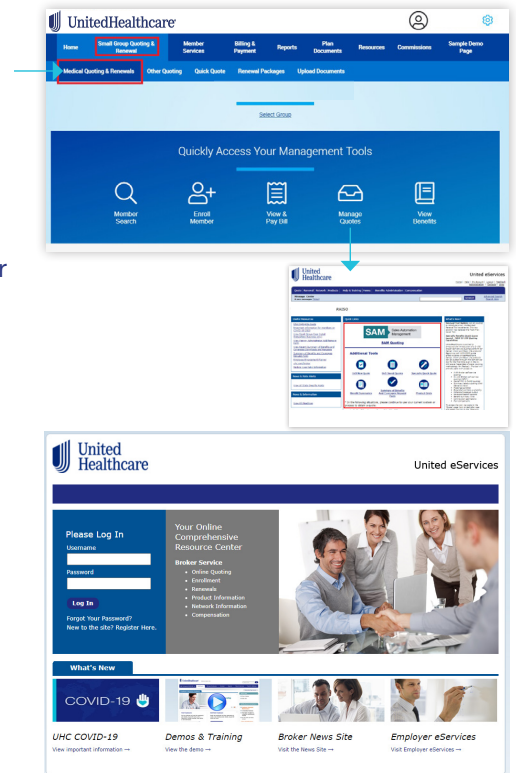
Save time with real-time data integration

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, employees and physicians—can access that information almost immediately.

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

- Employees 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 can translate to an improved service experience and fewer potential claim issues
- There's faster, more accurate reports and billing

Broker

Provider

Employer

Member
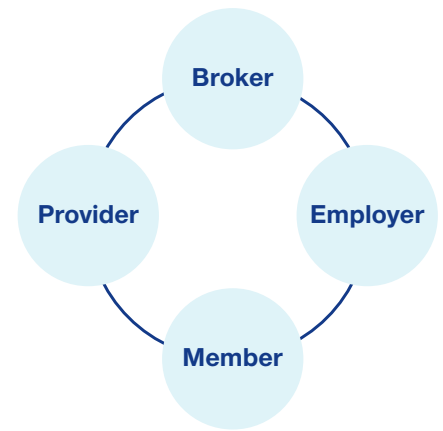
Ready to get started?

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

Questions?

Contact your UnitedHealthcare sales representative or call Client Services at **800-591-9911**

United Healthcare