



Small Business Broker and Agency Training Catalog

Summer 2022

**United
Healthcare**

Join us for the 2022 Summer Broker and Agency Webinar Series

Sharpen your skills and knowledge with UnitedHealthcare Fully Insured, UnitedHealthcare Level Funded and All Savers Alternate Funding products, services and processes for small business through our 2022 Summer Broker and Agency Webinar Series. With more than 80 informative and engaging webinars on topics like uhceservices.com, UnitedHealthcare pharmacy strategy, Benefitter basic and advanced trainings and more, our webinars are designed to help you gain an even better understanding of UnitedHealthcare products and services.

Make sure you and your agency are up to date on our most current products, sales and renewal tools, wellness programs, member service tools and everything else you need to know to be an invaluable resource to your clients. The trainings and information in these webinars will help position you to increase sales and retention, efficiently serve your clients and give you the tools to maximize success this year and beyond.

Please review our 2022 summer webinar catalog and make sure to join us for the webinar trainings that best set you and your agency up for success.

For more information, please contact your UnitedHealthcare representative.



Topic Listing and Descriptions

Advanced Sales Strategy: UnitedHealthcare Level Funded and Fully Insured

This training will take a deep dive into how to leverage the national scope of UnitedHealthcare in the small business segment, how to use SAMx as a sales tool and streamline the small group quoting process, and the various portfolio plan designs and trends to focus on this year and beyond.

Benefitter Basic Training

Benefitter is a small group quote-to-enroll platform for medical and ancillary insurance that was designed for, and by, agents to help you earn more in less time. This training is designed to provide a basic overview of how to use the Benefitter platform. We begin at the agent homepage, move to the client homepage, create a proposal, transition from proposal to enrollment, walk through multiple enrollment options, review submission options, and leave time for questions and comments.

Benefitter Advanced Training

Benefitter is a small group quote-to-enroll platform for medical and ancillary insurance that was designed for, and by, agents to help you earn more in less time. This training is designed to provide a comprehensive overview of how to use the Benefitter platform. We begin at the agent homepage, move to the client homepage, create a proposal, transition from proposal to enrollment, walk through multiple enrollment options, review submission options, and leave time for questions and comments.

Employer eServices® Training for Brokers and Employers with Fewer Than 100 Eligible Employees

This training aims to provide an overview of Employer eServices navigation and demonstrate the eligibility function in the context of policies with fewer than 100 eligible employees. This session is designed to complement existing Employer eServices training tools, such as online tutorials, and help training-on-demand and quick reference guides. While many new groups are transitioning to uhceservices, for administrative services, many groups will stay on Employer eServices throughout 2023.

New Business Broker and Agency 101 Training

Please join us for a general overview of the tools and tactics to write new UnitedHealthcare Fully Insured and Level Funded policies. We'll review requirements to quote a group; how to understand each quote; how to quote and enroll new fully insured business in SAMx; and how to quote, underwrite and enroll new business in SAMx Level Funded. We'll also touch on where to go for service needs for both UnitedHealthcare Fully Insured and Level Funded.

Product and Network 101: Broad and Quality Networks and Plan Types

Learn how UnitedHealthcare can offer your clients better cost control by utilizing innovative network strategies and plan designs. In this training, we'll discuss the power of one of the largest health coverage carriers in the country — UnitedHealthcare — including the diverse range of health coverage plans designed to be affordable and flexible, as well as how to determine the plans that best suit employees' needs. We'll also discuss some of the key features of our broad national networks, including UnitedHealthcare Choice, UnitedHealthcare Choice Plus and UnitedHealthcare Navigate®.

Renewal Focus: Broker and Agency 101 Training

Please join us for a general overview of the tools and tactics used to renew UnitedHealthcare Fully Insured, UnitedHealthcare Level Funded and All Savers Alternate Funding. We'll go over how to access renewal information online, how to quote alternate plans and additional lines of coverage, how to renew groups online and where to go for UnitedHealthcare and All Savers Alternate Funding service needs.

SAMx Fully Insured Quote and Enroll Broker Training

Learn how to use SAMx to quote and enroll your new fully insured small business (1-50) groups. During this training, you'll learn how to use the SAMx tool to quote medical and specialty products, then move the case through the enrollment process for full case submission.

SAMx – Level Funded Quote and Enroll Broker Training

SAMx – Level Funded has replaced myallsavers.com for quoting and enrolling 5-50 groups for UnitedHealthcare and Oxford Level Funded business. During this training, you will learn how to use the SAMx – Level Funded tool to quote medical and specialty products, then move the case through the enrollment process for submission.

Specialty Benefits Overview: Dental, Vision and Financial Protection

Join us to learn the advantages of placing dental, vision and financial protection products with UnitedHealthcare. We'll share the benefits that UnitedHealthcare provides as a specialty carrier for each product line and highlight items like ease of administration, Packaged Savings and the uBundle® discount.

uhceservices.com Service Model Overview

In this session, we'll review useful links on uhceservices – a centralized, self-service website that helps support the majority of a broker's book of business. We'll also explore how uhceservices links to and works with United eServices and Employer eServices.

uhceservices.com Training for Brokers

uhceservices.com is one centralized website that will support the majority of a broker's book of business. This powerful suite of online tools and resources is tailored to meet the needs of brokers and customers, and will serve as the front door to all other sites currently in use, including United eServices® and myallsavers.com. Being familiar with how to navigate and use the tool will help you save time and provide better service to your clients.

UnitedHealthcare Level Funded and All Savers Alternate Funding: Renewals and Conversions

In this training, we'll highlight the process of converting UnitedHealthcare Fully Insured groups to UnitedHealthcare Level Funded. We'll review how to request quotes from your RAE, necessary documents to submit a conversion and best practices to help ensure an efficient transition. Additionally, we'll highlight the basics of how to understand a renewal packet, how to process a renewal and how to run alternate renewal quotes.

UnitedHealthcare Level Funded and All Savers Alternate Funding: Reviewing the Executive Summary Report

This session will focus on how to interpret and understand the utilization data provided in the Executive Summary reports, as well as address frequently asked questions and the enhancements scheduled for 2022 and 2023. The goal of this session is to help brokers and employers better understand and share group performance information.

UnitedHealthcare Level Funded Introduction and New Business

UnitedHealthcare Level Funded is a partially self-funded health plan designed specifically for small businesses. During this introduction, we'll examine how to identify ideal candidates and review plan design and pricing methodology. Learn about the new plans being offered with September 1 effective dates.

UnitedHealthcare Level Funded and Oxford Level Funded Website and Process Training

This training will deliver a live demonstration for producers and agency sales support on myallsavers.com. You'll learn how to use the website as a first-time user, and new skills if you're already using the website, including:

- An introduction to the website for prospective UnitedHealthcare Level Funded users
- How to utilize the website to facilitate sales, including plan information, forms, brochures and explanation of quotes
- How to process a quote from beginning to end

UnitedHealthcare Level Funded versus All Savers Alternate Funding

Join our Account Executive Team to review the differences between All Savers Alternate Funding and UnitedHealthcare Level Funded products.

The UnitedHealthcare Pharmacy Strategy: UnitedHealthcare Fully Insured, Level Funded and All Savers Alternate Funding

Doctor of Pharmacy-level staff from the UnitedHealthcare Pharmacy team will present a review of the UnitedHealthcare pharmacy management strategy, member experience, cost-reduction strategies and opioid-management strategies. This presentation aims to give you a better understanding of UnitedHealthcare and industry-wide drug coverage decisions, and the tools you need to better coach your clients through the complicated web of generic, brand name and specialty drugs in the marketplace. We'll also compare our standard Advantage Prescription Drug List (PDL) and our more cost-effective Essential PDL in order to help you understand which PDL may fit your clients' needs best.

UnitedHealthcare Rewards Wellness Program Overview: Completely revamped for 2023

Join us for a high-level overview of what's to come for the revamped UnitedHealthcare Rewards Wellness Program in 2023. This presentation will provide details about bundling all wellness offerings from UnitedHealthcare, like UnitedHealthcare Motion® and Rally®, into one package for UnitedHealthcare Fully Insured plans with Jan. 1, 2023, effective dates.

UnitedHealthcare Rewards Wellness Program Deep Dive: Completely revamped for 2023

Join us for a deep dive into what's to come for the revamped UnitedHealthcare Rewards Wellness Program in 2023. This presentation will provide details about bundling all wellness offerings from UnitedHealthcare, like UnitedHealthcare Motion and Rally, into one package for UnitedHealthcare Fully Insured plans with Jan. 1, 2023, effective dates.

Webinar session title	Start time	End time	Location
Advanced Sales Strategy: UnitedHealthcare Level Funded and Fully Insured	June 23, 2022, 9 a.m. CT	June 23, 2022, 11 a.m. CT	Register for this webinar
	July 14, 2022, 9 a.m. CT	July 14, 2022, 11 a.m. CT	Register for this webinar
	Aug. 11, 2022, 9 a.m. CT	Aug. 11, 2022, 11 a.m. CT	Register for this webinar
	Sept. 8, 2022, 9 a.m. CT	Sept. 8, 2022, 11 a.m. CT	Register for this webinar
Benefitter Basic Training	June 14, 2022, 10:30 a.m. CT	June 14, 2022, 11:30 a.m. CT	Register for this webinar
	June 21, 2022, 10:30 a.m. CT	June 21, 2022, 11:30 a.m. CT	Register for this webinar
	June 28, 2022, 10:30 a.m. CT	June 28, 2022, 11:30 a.m. CT	Register for this webinar
	July 5, 2022, 10:30 a.m. CT	July 5, 2022, 11:30 a.m. CT	Register for this webinar
	July 12, 2022, 10:30 a.m. CT	July 12, 2022, 11:30 a.m. CT	Register for this webinar
	July 19, 2022, 10:30 a.m. CT	July 19, 2022, 11:30 a.m. CT	Register for this webinar
	July 26, 2022, 10:30 a.m. CT	July 26, 2022, 11:30 a.m. CT	Register for this webinar
	Aug. 2, 2022, 10:30 a.m. CT	Aug. 2, 2022, 11:30 a.m. CT	Register for this webinar
	Aug. 9, 2022, 10:30 a.m. CT	Aug. 9, 2022, 11:30 a.m. CT	Register for this webinar
	Aug. 16, 2022, 10:30 a.m. CT	Aug. 16, 2022, 11:30 a.m. CT	Register for this webinar
	Aug. 23, 2022, 10:30 a.m. CT	Aug. 23, 2022, 11:30 a.m. CT	Register for this webinar
	Aug. 30, 2022, 10:30 a.m. CT	Aug. 30, 2022, 11:30 a.m. CT	Register for this webinar
	Sept. 6, 2022, 10:30 a.m. CT	Sept. 6, 2022, 11:30 a.m. CT	Register for this webinar
	Sept. 13, 2022, 10:30 a.m. CT	Sept. 13, 2022, 11:30 a.m. CT	Register for this webinar
	Sept. 20, 2022, 10:30 a.m. CT	Sept. 20, 2022, 11:30 a.m. CT	Register for this webinar
Sept. 27, 2022, 10:30 a.m. CT	Sept. 27, 2022, 11:30 a.m. CT	Register for this webinar	

Webinar session title	Start time	End time	Location
Benefitter Advanced Training	June 16, 2022, 12 p.m. CT	June 16, 2022, 1 p.m. CT	Register for this webinar
	June 23, 2022, 12 p.m. CT	June 23, 2022, 1 p.m. CT	Register for this webinar
	June 30, 2022, 12 p.m. CT	June 30, 2022, 1 p.m. CT	Register for this webinar
	July 7, 2022, 12 p.m. CT	July 7, 2022, 1 p.m. CT	Register for this webinar
	July 14, 2022, 12 p.m. CT	July 14, 2022, 1 p.m. CT	Register for this webinar
	July 21, 2022, 12 p.m. CT	July 21, 2022, 1 p.m. CT	Register for this webinar
	July 28, 2022, 12 p.m. CT	July 28, 2022, 1 p.m. CT	Register for this webinar
	Aug. 4, 2022, 12 p.m. CT	Aug. 4, 2022, 1 p.m. CT	Register for this webinar
	Aug. 11, 2022, 12 p.m. CT	Aug. 11, 2022, 1 p.m. CT	Register for this webinar
	Aug. 18, 2022, 12 p.m. CT	Aug. 18, 2022, 1 p.m. CT	Register for this webinar
	Aug. 25, 2022, 12 p.m. CT	Aug. 25, 2022, 1 p.m. CT	Register for this webinar
	Sept. 1, 2022, 12 p.m. CT	Sept. 1, 2022, 1 p.m. CT	Register for this webinar
	Sept. 8, 2022, 12 p.m. CT	Sept. 8, 2022, 1 p.m. CT	Register for this webinar
	Sept. 15, 2022, 12 p.m. CT	Sept. 15, 2022, 1 p.m. CT	Register for this webinar
	Sept. 22, 2022, 12 p.m. CT	Sept. 22, 2022, 1 p.m. CT	Register for this webinar
Sept. 29, 2022, 12 p.m. CT	Sept. 29, 2022, 1 p.m. CT	Register for this webinar	
Employer eServices Training for Brokers and Employers with Fewer Than 100 Eligible Employees	June 21, 2022, 1 p.m. CT	June 21, 2022, 2 p.m. CT	Register for this webinar
New Business Broker and Agency 101 Training	June 15, 2022, 2 p.m. CT	June 15, 2022, 3 p.m. CT	Register for this webinar
	July 13, 2022, 10 a.m. CT	July 13, 2022, 11 a.m. CT	Register for this webinar
	Aug. 10, 2022, 2 p.m. CT	Aug. 10, 2022, 3 p.m. CT	Register for this webinar
	Sept. 14, 2022, 10 a.m. CT	Sept. 14, 2022, 11 a.m. CT	Register for this webinar

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Product and Network 101: Broad and High-Performing Networks and Plan Types	June 29, 2022, 11 a.m. CT	June 29, 2022, 12 p.m. CT	Register for this webinar
	July 27, 2022, 11 a.m. CT	July 27, 2022, 12 p.m. CT	Register for this webinar
	Aug. 24, 2022, 11 a.m. CT	Aug. 24, 2022, 12 p.m. CT	Register for this webinar
	Sept. 7, 2022, 11 a.m. CT	Sept. 7, 2022, 12 p.m. CT	Register for this webinar
Renewal Focus: Broker and Agency 101 Training	June 14, 2022, 2 p.m. CT	June 14, 2022, 3 p.m. CT	Register for this webinar
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	Sept. 29, 2022, 2 p.m. CT	Sept. 29, 2022, 3 p.m. CT	Register for this webinar
uhceservices.com Service Model Overview	June 22, 2022, 1 p.m. CT	June 22, 2022, 1:30 p.m. CT	Register for this webinar
	July 6, 2022, 1 p.m. CT	July 6, 2022, 1:30 p.m. CT	Register for this webinar
	July 20, 2022, 1 p.m. CT	July 20, 2022, 1:30 p.m. CT	Register for this webinar
	Aug. 3, 2022, 1 p.m. CT	Aug. 3, 2022, 1:30 p.m. CT	Register for this webinar
	Aug. 24, 2022, 1 p.m. CT	Aug. 24, 2022, 1:30 p.m. CT	Register for this webinar
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uhceservices.com Training for Brokers	July 7, 2022, 2 p.m. CT	July 7, 2022, 3 p.m. CT	Register for this webinar
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UnitedHealthcare Level Funded and All Savers Alternate Funding: Renewals and Conversions	June 16, 2022, 10:30 a.m. CT	June 16, 2022, 11 a.m. CT	Register for this webinar
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UnitedHealthcare Level Funded Introduction and New Business	June 21, 2022, 10:30 a.m. CT	June 21, 2022, 11:15 a.m. CT	Register for this webinar
	July 12, 2022, 10:30 a.m. CT	July 12, 2022, 11:15 a.m. CT	Register for this webinar
	Aug. 9, 2022, 1 p.m. CT	Aug. 9, 2022, 1:30 p.m. CT	Register for this webinar
	Aug. 24, 2022, 9 a.m. CT	Aug. 24, 2022, 9:30 a.m. CT	Register for this webinar
UnitedHealthcare Level Funded and Oxford Level Funded Website and Process Training	June 15, 2022, 10 a.m. CT	June 15, 2022, 11 a.m. CT	Register for this webinar
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UnitedHealthcare Level Funded versus All Savers Alternate Funding	June 22, 2022, 9:30 a.m. CT	June 22, 2022, 10 a.m. CT	Register for this webinar
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	Sept. 7, 2022, 1:30 p.m. CT	Sept. 7, 2022, 2 p.m. CT	Register for this webinar
UnitedHealthcare Pharmacy Strategy: UnitedHealthcare Fully Insured, Level Funded and All Savers® Alternate Funding	June 15, 2022, 1 p.m. CT	June 15, 2022, 2 p.m. CT	Register for this webinar
	July 13, 2022, 1 p.m. CT	July 13, 2022, 2 p.m. CT	Register for this webinar
	Aug. 17, 2022, 1 p.m. CT	Aug. 17, 2022, 2 p.m. CT	Register for this webinar
UnitedHealthcare Rewards Wellness Program Overview: Completely Revamped for 2023	July 19, 2022, 1:30 p.m. CT	July 19, 2022, 2:30 p.m. CT	Register for this webinar
UnitedHealthcare Rewards Wellness Program Deep Dive: Completely Revamped for 2023	Sept. 13, 2022, 1:30 p.m. CT	Sept. 13, 2022, 2:30 p.m. CT	Register for this webinar

Pre-Recorded Trainings

National in scope

- [Benefitter Proposal Walk-through](#)
- [uhceservices.com Broker Training Video](#)

Fully Insured focus

- [SAMx Quote & Enroll](#)
- [SAMx Quote & Enroll Template \(Census\)](#)

Level Funded focus

- [All Savers Pre-Recorded Broker Training Flyer](#)
- [SAMx – Level Funded Census Template](#)
- [SAMx – Level Funded Quote & Enroll](#)
- [SAMx – Level Funded Renewals Webinar Recording](#)
- [SAMx – Level Funded Vertical Census Template](#)

Regional in scope

- [Oxford CT/NJ/NY SAMx Quote & Enroll](#)
- [Oxford CT/NJ/NY SAMx Renewals](#)
- [UnitedHealthcare Freedom Plans \(NH\): SAMx Quote & Enroll Webinar Recording](#)
- [United Healthcare Freedom Plans \(NH\): United eServices to Quote Life, STD, LTD](#)

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Administrative services provided by United HealthCare Services, Inc. or their affiliates.

Administrative services provided by United HealthCare Services, Inc. or their affiliates, and UnitedHealthcare Service LLC in NY. Stop-loss insurance is underwritten by All Savers Insurance Company (except CA, MA, MN, NJ and NY), UnitedHealthcare Insurance Company in MA and MN, UnitedHealthcare Life Insurance Company in NJ, UnitedHealthcare Insurance Company of New York in NY, and All Savers Life Insurance Company of California in CA.

Administrative services provided by Oxford Health Plans LLC. Stop-loss insurance is underwritten by All Savers Insurance Company in CT, UnitedHealthcare Life Insurance Company in NJ, and UnitedHealthcare Insurance Company of New York in NY.

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