



Small Business Broker and Agency Training Catalog

Summer 2023

**United
Healthcare**

Join us for the 2023 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 2023 Summer Broker and Agency Webinar Series. With almost 100 informative and engaging webinars on topics such as uhceservices.com, UnitedHealthcare pharmacy strategy, Benefitter training 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 2023 summer webinar catalog and join us for the webinars that best set you and your agency up for success.

For more information, please contact your UnitedHealthcare representative.



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Topic Listing and Descriptions

Advanced Benefitter Training

Benefitter is a small group quote-to-enroll platform for Small Business medical and specialty lines that was designed for and by agents to help you earn more in less time. This training is designed to provide in-depth walk-through of different enrollment and submission options and give you the opportunity to ask questions. Please ensure you have completed the Basic Benefitter Training prior to attending the Advanced Benefitter Training. It is important to have this comprehensive background beforehand.

Advanced Sales Strategy, Decoding our Level Funded Product 2–50

Expand your expertise on the benefit options and capabilities of our lead Small Business product, Level Funded. You will learn the subtle nuances within Level Funded, including the different benefit and capability options. You will leave this training with the confidence to quote and sell UnitedHealthcare Level Funded as a solution for the employers you work with.

Advanced Sales Strategy, UnitedHealthcare Fully Insured & Level Funded in Small Business

This session will focus on new business sales strategies that will separate brokers from your competition, leading with UnitedHealthcare Level Funded, followed by our combined approach of Level Funded and Fully Insured in the small business space. Join us to learn about best practices and strategies that will wow your prospects and clients and show them you are their small business group benefits expert.

All Savers to UnitedHealthcare Level Funded Renewal Transitions

All Savers® Alternate Funding groups will transition to UnitedHealthcare Level Funded. During this training, you will learn about the renewal process and employer and member communications related to this transition. This training applies to groups with up to 50 employees and 51+/Key Accounts groups in all markets.

Basic Benefitter Training

Benefitter is a small group quote-to-enroll platform for Small Business medical and specialty benefits 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, seamlessly transition from a proposal to an enrollment, multiple enrollment options, and end with a review of submission options and time for questions and comments.

Product and Network 101 – Broad and High Performing Networks and Plan Types

The right network can be an integral part of an overall health benefits strategy. UnitedHealthcare makes it simple for members to find a network physician or hospitals in their local areas with the goal of helping members lower their out-of-pocket medical expenses. This overview will highlight our networks you may see on your quotes and renewals, UnitedHealth Premium® Designation program, and explore best practices when presenting UnitedHealthcare networks and products to clients. When it comes to selecting plan options, you will come away from this training with a good idea how to identify which clients are a good fit for each plan type and network options offered in the small business space.

Renewing UnitedHealthcare Fully Insured Policies onto UnitedHealthcare Level Funded Plans

During this webinar, we will discuss the top reasons as to why a group would move from Fully Insured to Level Funded along with details as to what is needed for the conversion process.

SAMx Fully Insured Quote and Enroll for Brokers

Learn how to use SAMx to quote and enroll your new Fully Insured small business (for applicable markets) groups. During this training, you will learn how to quote medical and specialty products, then move the case through the enrollment process for full case submission.

SAMx Fully Insured Renewals

Learn how to use SAMx to renew your Fully Insured small business (for applicable markets) groups.

SAMx Level Funded Quote and Enroll for Brokers

Learn how to use SAMx to quote and enroll your new Level Funded small business (for applicable markets) groups. During this training, you will learn how to quote medical and specialty products, then move the case through the enrollment process for full case submission.

SAMx Level Funded Renewals

Learn how to use SAMx to renew your UnitedHealthcare Level Funded small business (for applicable markets) groups.

UnitedHealthcare Level Funded and All Savers: Renewals, Migrations and Conversions

This training will highlight the process of converting UnitedHealthcare Fully Insured groups to UnitedHealthcare Level Funded. We will review how to request quotes from your Renewal Account Executive, necessary documents to submit a conversion and best practices to help ensure an efficient transition. We will highlight the basics of how to understand a renewal packet, process a renewal and run alternate renewal quotes. Lastly, we will provide a brief overview on our migration process moving our existing All Savers groups to UnitedHealthcare Level Funded upon renewal.

UnitedHealthcare Level Funded Executive Summary Review for Brokers

This presentation will provide a deep dive into the layers of information available for your UnitedHealthcare Level Funded plan. The session will focus on how to interpret and understand the utilization data provided in the report as well as address frequently asked questions and enhancements scheduled for 2023. The goal is to help brokers and employers achieve a more comprehensive understanding of not only how your UnitedHealthcare Level Funded group is performing at a given point in time, but also how to share this information most effectively.

UnitedHealthcare Pharmacy Strategy for Your Clients

The UnitedHealthcare Pharmacy team will present a review of our pharmacy management, member experience, cost-reduction 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 medications in the marketplace. We will offer a comparison of our Prescription Drug Lists (PDLs) to help you understand which PDL may fit your clients' needs best. We will also highlight the exciting new UnitedHealthcare Vital Medication Program, which represents a substantial benefit upgrade for your clients.

UnitedHealthcare Rewards (UHC Rewards) Wellness Program

Our newest wellness innovation, UHC Rewards promotes better overall health for our members. This is more than a fitness and wellness program; UHC Rewards goes a step further by combining the best practices from existing incentive programs and consolidating into an easy-to-access new offering. Participants can earn financial rewards by reaching daily goals while personalizing their experience and selecting activities that are right for them. This program is currently included on all 2-50 fully insured groups in our 2023 product portfolio and will be coming to our Level Funded product in 2024 in most markets. Join this webinar to learn how to educate your clients on this exciting program.

UnitedHealthcare Service Model Overview/Onboarding and Servicing for Fully Insured and Level Funded

This session will explore the many features of uhceservices.com with access to United eServices, Employer eServices, and the SAMx Fully Insured and SAMx Level Funded quote and enroll tools. We will also review more traditional service resources and best practices to service your new and renewing groups once they have moved to uhceservices.com. Make sure you and your agency are prepared to use our new UnitedHealthcare eServices broker tool and our current service structure to your greatest benefit.

UnitedHealthcare Specialty Benefits Overview – Dental, Vision and Financial Protection

Please join our UnitedHealthcare team to learn the benefits of selling Dental, Vision, Life and Disability alongside our Medical products. We will highlight key features that differentiate our Specialty products from other carriers. We will provide an overview on the ease of adding Specialty to your quotes, best practices for selecting plans and what this will look like for both broker and employer administration after the group is installed. You will learn about the savings initiatives we have in place and how putting all lines of medical and specialty with UnitedHealthcare can benefit you as the broker.

UnitedHealthcare eServices New Business: Broker & Agency Training 101

In this session, we will show you how easy it is to quote and enroll new UnitedHealthcare groups in the small business space. We will review the "quote to card" process, how to read our small business quotes, and our combined Fully Insured, Level Funded and specialty products approach in most markets. We will share our best practices to ensure you are obtaining the most competitive multi-line UnitedHealthcare quotes for your clients as quickly and efficiently as possible. See how we have simplified the enrollment process for new groups through our innovative SAMx portal and where to go for any needs during the quoting and implementation process.

UnitedHealthcare eServices Renewals: Agency and Broker 101 Training

Please join us for a general overview of the tools and tactics used to renew UnitedHealthcare Fully Insured and UnitedHealthcare Level Funded. We will 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 service needs.

uhceservices.com 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. It 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.

uhceservices.com: Most Important Things for Your Agency to Know

This training will educate brokers on basic functions of **uhceservices.com** and how to access quoting portals such as SAM and SAMx. We will review the most frequently asked questions and their solutions and review the suite of small business tools available. Please join us for an update on the most important things for you and your agency to know about **uhceservices.com**.

Sales Strategy 101: Intro to UnitedHealthcare Level Funded & New Business

UnitedHealthcare Level Funded is a partially self-funded health plan designed specifically for small businesses that has evolved into our lead product for many industries and geographies. During this introduction, we will examine how to identify ideal candidates for this product and review plan design and pricing methodology. If you are new to UnitedHealthcare Level Funded, or have been selling it for years, you will benefit from this overview and the updates and enhancements we have made.

Webinar session title	Start/end time	Location
Advanced Benefitter Training	June 15, 12–1 p.m. CT	Register for this webinar
	June 22, 12–1 p.m. CT	Register for this webinar
	June 29, 12–1 p.m. CT	Register for this webinar
	July 6, 12–1 p.m. CT	Register for this webinar
	July 13, 12–1 p.m. CT	Register for this webinar
	July 22, 12–1 p.m. CT	Register for this webinar
	July 27, 12–1 p.m. CT	Register for this webinar
	Aug. 3, 12–1 p.m. CT	Register for this webinar
	Aug. 10, 12–1 p.m. CT	Register for this webinar
	Aug. 17, 12–1 p.m. CT	Register for this webinar
	Aug. 24, 12–1 p.m. CT	Register for this webinar
	Aug. 31, 12–1 p.m. CT	Register for this webinar
	Sept. 7, 12–1 p.m. CT	Register for this webinar
	Sept. 14, 12–1 p.m. CT	Register for this webinar
Sept. 21, 12–1 p.m. CT	Register for this webinar	
Sept. 28, 12–1 p.m. CT	Register for this webinar	
Advanced Sales Strategy, Decoding our Level Funded Product 2-50	June 14, 1–1:45 p.m. CT	Register for this webinar
	July 19, 1–1:45 p.m. CT	Register for this webinar
	Aug. 16, 1:30–2:15 p.m. CT	Register for this webinar
	Sept. 13, 2–2:45 p.m. CT	Register for this webinar
Advanced Sales Strategy, UnitedHealthcare Fully Insured & Level Funded in Small Business	June 21, 1–2 p.m. CT	Register for this webinar
	July 26, 1–2 p.m. CT	Register for this webinar
	Aug. 16, 12–1 p.m. CT	Register for this webinar
	Sept. 6, 1–2 p.m. CT	Register for this webinar
All Savers to UnitedHealthcare Level Funded Renewal Transitions	July 12, 12–1 p.m. CT	Register for this webinar

Webinar session title	Start/end time	Location
Basic Benefitter Training	June 13, 10:30–11:30 a.m. CT	Register for this webinar
	June 20, 10:30–11:30 a.m. CT	Register for this webinar
	June 27, 10:30–11:30 a.m. CT	Register for this webinar
	July 11, 10:30–11:30 a.m. CT	Register for this webinar
	July 17, 10:30–11:30 a.m. CT	Register for this webinar
	July 25, 10:30–11:30 a.m. CT	Register for this webinar
	Aug. 1, 10:30–11:30 a.m. CT	Register for this webinar
	Aug. 8, 10:30–11:30 a.m. CT	Register for this webinar
	Aug. 15, 10:30–11:30 a.m. CT	Register for this webinar
	Aug. 22, 10:30–11:30 a.m. CT	Register for this webinar
	Aug. 29, 10:30–11:30 a.m. CT	Register for this webinar
	Sept. 5, 10:30–11:30 a.m. CT	Register for this webinar
	Sept. 12, 10:30–11:30 a.m. CT	Register for this webinar
	Sept. 19, 10:30–11:30 a.m. CT	Register for this webinar
Sept. 26, 10:30–11:30 a.m. CT	Register for this webinar	
Product and Network 101 – Broad and High Performing Networks and Plan Types	June 13, 12–1 p.m. CT	Register for this webinar
	Aug. 15, 12–1 p.m. CT	Register for this webinar
	Sept. 12, 12–1 p.m. CT	Register for this webinar
Renewing UnitedHealthcare Fully Insured Policies onto UnitedHealthcare Level Funded Plans	June 21, 9–10 a.m. CT	Register for this webinar
	July 26, 9–10 a.m. CT	Register for this webinar
	Aug. 10, 9–10 a.m. CT	Register for this webinar
	Sept. 27, 9–10 a.m. CT	Register for this webinar
SAMx Fully Insured Quote & Enroll for Brokers	July 18, 12–1 p.m. CT	Register for this webinar
	Aug. 21, 1–2 p.m. CT	Register for this webinar
	Sept. 12, 12–1 p.m. CT	Register for this webinar
SAMx Fully Insured Renewals	July 27, 12–12:30 p.m. CT	Register for this webinar
	Aug. 17, 12:30–1 p.m. CT	Register for this webinar
	Sept. 6, 2–2:30 p.m. CT	Register for this webinar

Webinar session title	Start/end time	Location
SAMx Level Funded Quote & Enroll for Brokers	July 24, 1-2 p.m. CT	Register for this webinar
	Aug. 29, 11-12 p.m. CT	Register for this webinar
	Sept. 27, 2-3 p.m. CT	Register for this webinar
SAMx Level Funded Renewals	July 11, 11-11:30 a.m. CT	Register for this webinar
	Aug. 8, 12-12:30 p.m. CT	Register for this webinar
	Sept. 13, 1:30-2 p.m. CT	Register for this webinar
UnitedHealthcare Level Funded & All Savers: Renewals, Migrations and Conversions	June 13, 11-11:30 a.m. CT	Register for this webinar
	July 20, 1-1:30 p.m. CT	Register for this webinar
	Aug. 15, 11-11:30 a.m. CT	Register for this webinar
	Sept. 7, 1-1:30 p.m. CT	Register for this webinar
UnitedHealthcare Level Funded Executive Summary Review for Brokers	June 20, 1-2 p.m. CT	Register for this webinar
	July 18, 1-2 p.m. CT	Register for this webinar
UnitedHealthcare Pharmacy Strategy for Your Clients	June 21, 12-1 p.m. CT	Register for this webinar
	July 26, 12-1 p.m. CT	Register for this webinar
	Aug. 23, 12-1 p.m. CT	Register for this webinar
UnitedHealthcare Rewards Wellness Program	June 14, 2-3 p.m. CT	Register for this webinar
	July 19, 2-3 p.m. CT	Register for this webinar
	Aug. 9, 2-3 p.m. CT	Register for this webinar
	Sept. 6, 2-3 p.m. CT	Register for this webinar
UnitedHealthcare Service Model Overview/Onboarding and Servicing for Fully Insured and Level Funded	June 28, 11 a.m.-12 p.m. CT	Register for this webinar
	July 19, 11 a.m.-12 p.m. CT	Register for this webinar
	Aug. 23, 11 a.m.-12 p.m. CT	Register for this webinar
	Sept. 20, 11 a.m.-12 p.m. CT	Register for this webinar
UnitedHealthcare Specialty Benefits Overview - Dental, Vision and Financial Protection	June 14, 3-4 p.m. CT	Register for this webinar
	July 11, 1-2 p.m. CT	Register for this webinar
	Aug. 2, 11 a.m.-12 p.m. CT	Register for this webinar
	Aug. 9, 10:30-11:30 a.m. CT	Register for this webinar
	Sept. 21, 10-11 a.m. CT	Register for this webinar

Webinar session title	Start/end time	Location
UnitedHealthcare eServices New Business: Broker & Agency Training 101	June 21, 11 a.m.–12 p.m. CT	Register for this webinar
	July 26, 11 a.m.–12 p.m. CT	Register for this webinar
	Aug. 23, 10–11 a.m. CT	Register for this webinar
	Sept. 20, 10–11 a.m. CT	Register for this webinar
UnitedHealthcare eServices Renewals: Broker and Agency 101 Training	July 12, 11 a.m.–12 p.m. CT	Register for this webinar
	Aug. 16, 11 a.m.–12 p.m. CT	Register for this webinar
	Sept. 13, 11 a.m.–12 p.m. CT	Register for this webinar
uhceservices.com for Brokers	July 25, 2–3 p.m. CT	Register for this webinar
	Aug. 8, 2–3 p.m. CT	Register for this webinar
	Sept. 12, 2–3 p.m. CT	Register for this webinar
uhceservices.com: Most important things for your agency to know	June 15, 11 a.m.–12 p.m. CT	Register for this webinar
	July 20, 11 a.m.–12 p.m. CT	Register for this webinar
	Aug. 17, 11 a.m.–12 p.m. CT	Register for this webinar
	Sept. 21, 11 a.m.–12 p.m. CT	Register for this webinar
UnitedHealthcare: Intro to Level Funded & New Business	June 14, 11 a.m.–12 p.m. CT	Register for this webinar
	July 12, 1–2 p.m. CT	Register for this webinar
	Aug. 9, 1–2 p.m. CT	Register for this webinar
	Sept. 14, 11 a.m.–12 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

- [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 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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