It's time for open enrollment.

A better enrollment experience from start to finish.

Welcome to UnitedHealthcare's Digital Onboarding program. The new Digital Onboarding process is designed to be better and simpler for you and your employees including real-time analysis to help you manage enrollment.

Designed to help you understand how this tool will support you and can make life a little easier during your open enrollment, use this guide as you work with your broker or consultant to complete the following four steps:
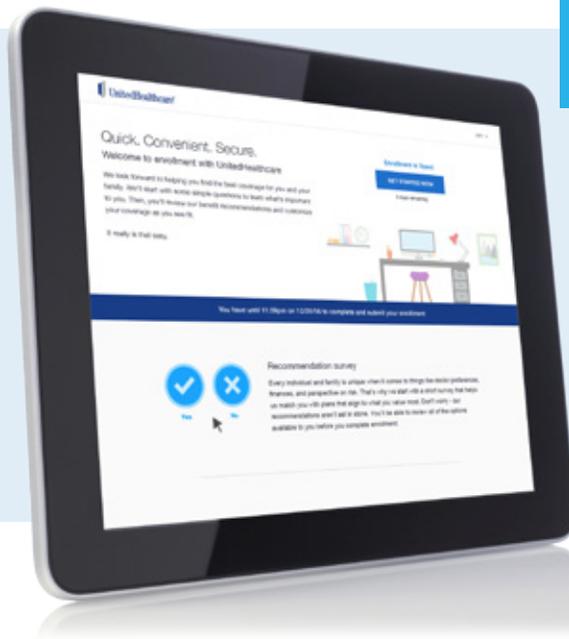
1	2	3	4
Plan	Launch	Track	Relax

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1   **2**   **3**   **4**

Plan   **Launch**   **Track**   **Relax**

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Step 1: Plan.

So you've just signed up for UnitedHealthcare's Digital Onboarding tool. What now?

Implementation meeting:

Your Implementation Manager will contact you to discuss:

- ☐ Census requirements.
- ☐ Start and end date for open enrollment.
- ☐ How the plans and products are being offered to your employees.
  - Will they be the same for all employees or differ by employee category/class?
  - Make sure of the plan availability by employee classification so each employee has the correct information when selecting their benefits.
- ☐ Plan names — display names to be descriptive for employees.
- ☐ Payroll frequency (including difference in frequency by employee classification).
- ☐ How much your employees will pay for benefits and how much you will contribute to any financial accounts.
- ☐ Date and time for training and site demonstration.
  - Identify who needs to attend the meeting.
  - Obtain information needed to set up HR Administrator(s).
- ☐ If you would like your broker to have access to the site.
- ☐ Who will conduct user site testing/validation.

After the implementation meeting:

Your Benefits team will set up the Digital Onboarding tool.

Use the tools:

There is an Appendix with resources to help get the word out about open enrollment.

- ☐ Post the member flier on your intranet or in common areas.
- ☐ Include the newsletter article in your employee communications.
- ☐ Send an email to all employees to announce the open enrollment.

Go-live meeting — your Digital Onboarding site is ready for testing:

- ☐ We will provide you with access to the UnitedHealthcare Digital Onboarding Employer Admin Tool where you will be able to enroll on behalf of your employees, update census information and view reports.
- ☐ Review your personalized website and work with your Implementation Manager to make changes.
- ☐ Approve your participant (eligibility) list and product offerings.
- ☐ If there were changes to the Digital Onboarding site, review these again prior to launch to ensure they are correct.

Two to four weeks before open enrollment is available online (see Appendix), remember to:

- ☐ Send an email to all employees to announce the open enrollment.
- ☐ Include newsletter article in your employee communication.
- ☐ Post the flier included in the kit on your intranet or in common areas.

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Step 2: Launch.

Once your site has been approved, we'll launch your personalized open enrollment website.

What to expect:

☐ We will send an email up to five days before open enrollment notifying employees about online open enrollment from **support@uhconboarding.com**.

☐ On the day open enrollment begins, we will launch your personalized website for employees to begin benefit enrollment.

☐ Emails will be sent directly to employees from **support@uhconboarding.com** initiating the open enrollment season.

☐ Prior to and during open enrollment you will be able to correct your employees' census information in the UnitedHealthcare Digital Onboarding Employer Admin Tool.

   Warning: Any changes to employee census data after elections have begun will require the employee to reenroll in benefits.

☐ Enroll on behalf of employees not able to enroll online themselves.

☐ Note: Additional emails will be sent on an ongoing basis to employees that have not yet opted in or out of their available benefits.

Remember to:

☐ Check the census information in the UnitedHealthcare Digital Onboarding Employer Dashboard to make sure it's correct.

☐ Enroll on behalf of employees who are not able to enroll online themselves.

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Step 3: Track.
Open enrollment is well underway — what can you do to verify progress?

Use reporting:

There are a number of reports available in the Digital Onboarding tool. Throughout open enrollment, to track employees' progress, we recommend you use:

☐ Enrollment Status Report — a snapshot of enrollment completion status for all employees.

Note: Your implementation manager will provide you with a guide on how to access your reports.

Prepare to close open enrollment:

☐ You will receive an email noting the closure of your open enrollment season.

☐ Review audit results with the report referenced above and verify accuracy at the completion of open enrollment.

- Notify your Implementation Manager once you've approved all employee coverage elections.

☐ Any changes to benefits for new employees, or those with life changes, will continue to be made in Employer eServices®.

Remember to:

☐ Check your report regularly to monitor the progress of your employees during open enrollment.

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Step 4: Wrap-Up.
You've completed your audit and open enrollment is closed. What should you do now?

☐ Health plan ID cards will be mailed to your members over the coming weeks in preparation for the plan year.

☐ Download reports as needed for final eligibility and to share your employees' elections with a third party, such as a payroll vendor. We recommend you use this report:

- Benefit Elections Report (Employee and Dependent).

☐ Training with your Field Account Manager will ensure you have access and training on our Employer eServices website, where you will be able to:

- Process employee adds, terminations and changes (life events).

- View and manage invoices and your payment history.

- View Wellness Tools & Tips to promote with your employees.

- View and download reports.

☐ Contact your broker/consultant or sales rep with any questions.

Questions? Just get in touch.

For general questions, contact your broker/consultant or sales representative.
For technical help, contact UnitedHealthcare at **877-726-2360**.

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Appendix.
Click on thumbnail to open.

One-page Member Flier

Two-page Member Flier

Employee Newsletter Article

Employee Email

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Open enrollment is better when it's simpler, faster and all online.

Additional reports and a brief description of report details:

- Deduction report — all active employee deductions, by pay period, including effective and deduction dates.

- Benefit election report (employee only) — benefit election and basic census information for employees who experienced an election update within a user-defined date range.

- Benefit elections with waived benefits (employee and dependents) — similar output to other benefit election reports, inclusive of waived benefits.

- Benefit elections report (employee and dependents) — benefit election and basic census information for employees and dependents who experienced an election update within a user-defined date range.

- Comprehensive report (current elections) — a comprehensive snapshot of all election and census data for employees and dependents.

- Comprehensive report (full election history) — a comprehensive snapshot of all election and census data for employees and dependents with election history.

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