



## Small Group Enrollment

Enroll small group clients and track progress online.

# SAM allows you to enroll small groups online and track their progress.

Now you can more efficiently enroll your small groups online with a streamlined process, saving time and making it easier to do business with UnitedHealthcare.

### More control. Easy to use. And faster than ever. With SAM, you can:

- ▶ Continue the enrollment process from your SAM quote.
- ▶ Invite customers and employees to complete applications and enrollment online – the employee shopping experience makes plan comparisons and selection easy.
- ▶ Enjoy streamlined, significantly reduced requirements for data and documentation.
- ▶ Option to simply upload aggregated group enrollment data via spreadsheet.
- ▶ Receive a real-time submission ID number upon completion of your submission.

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## Simple Login:

- ▶ Go to [www.UnitedeServices.com](http://www.UnitedeServices.com).
- ▶ Enter User ID and Password, Click **Login**.
- ▶ Choose **SAM**.

Your SAM Dashboard allows you to monitor and manage sales pipeline and case progress.



## TO START.

Find your Quote: Click **Activities** on the top navigation bar, Select **Recent**, Choose your Quote.

- ▶ Choose to Complete the Employer Application yourself or send a link to the employer to complete the application.
- ▶ Click **Enroll** to proceed or **Cancel** to make Plan Selection changes.
- ▶ Before you get started, review the supporting documents you will need, Click **Next**.
  - Wage & Tax.
  - Employer Contact Info.
  - Employee Eligibility Info (current & prior year).
  - Carrier Bills (current).
  - Copy of Binder Check or ACH direct debit info.
  - Copy of current Census Information with email address for each individual.

Information entered in SAM Quoting is carried forward to Enrollment to save you time.

Follow these simple steps to enroll a group online:

## EMPLOYER APPLICATION.

✓ Employer Information	Employer Contribution(s)	Eligibility Requirements	Current Carrier
Producer Information	Application Summary	Signature	

- ▶ Enter required **Employer Information** (fields marked with an asterisk\*). Click **Next**.
- ▶ Confirm or correct **Employer Contribution** information carried forward from Quote. Click **Next**.
- ▶ Confirm or correct **Eligibility Requirements**. Click **Next**.
- ▶ Provide **General Information**, and **CDHP Options**. Click **Next**.
- ▶ Answer **Questions Regarding Group Size**. Click **Next**.
- ▶ Complete **Current Carrier** information. Click **Next**.
- ▶ **Producer Information** is prefilled for you. Just add a social security number. Click **Next**.
- ▶ Review and edit the **Employer Application Summary** information and **Print** the information if you want a printed copy. Click **Next**.
- ▶ Now all you need is an electronic signature:
  - Before you sign, you must agree to terms and conditions listed.
  - You must also attest that you have the Employer's completed form with signature on file.
- ▶ Enter the date, your name twice, then click **Submit** to finish the Employer Application.

Once the Employer Application is submitted, click **View Application** to print or save a copy for your files. Scroll through the document to review, then close it. **Now you are ready to begin Employee Enrollment!**

Enter an email address for each employee and you can send them a link to complete their online enrollment by a specified due date.

## ENROLLMENT MANAGER / ENROLLMENT SET-UP.

- ▶ Click **Start Enrollment**. **! Employer Information** **Employer Enrollment** **Final Acceptance**
- ▶ The enrollment period is already set based on the Effective Date entered previously. Change dates if necessary.
- ▶ Before enrollment begins, complete all required information (some of it pre-filled from the census) for each employee on the census. Click **Actions** and then **Edit** for each employee.
- ▶ To get complete enrollment information for each employee, choose Online or Paper Enrollment.
  - If you choose Online, enter email addresses for each employee. They receive a link via email to enroll online.
  - If you choose Paper, Click link to **Download Employee Enrollment Form**.
- ▶ Once you've completed required fields for each employee, click **Save**.
- ▶ Once you've entered all the required information for all employees, click **Open Enrollment** – this activates Employee Enrollment functionality.

## ENROLLMENT MANAGER / ENTERING ENROLLMENT DATA.

You can enter enrollment data two ways:

1. Upload an Enrollment Spreadsheet containing data for multiple enrollees.
2. Enter data for each enrollee individually - either on behalf of the enrollees. or have the employees enter their own data online.

### Group enrollment via spreadsheet.

To upload aggregated group enrollment data via spreadsheet:

- ▶ Select **Export Enrollment Template**.
- ▶ All census data already entered in SAM Quote is exported into the spreadsheet.
- ▶ Enter remaining required data and **Save** (reference the Instructions tab for definitions of each required field).
- ▶ Select **Import Enrollment Data**.
- ▶ While the data is loading, the system will indicate it is processing.
- ▶ When the Enrollment Progress bar is updated and the status of each enrollee is completed, the data upload is done.
- ▶ If you have made an error, SAM will note the cell that is incorrect.
- ▶ Correct the error and click **Import Enrollment Data** again.
- ▶ When enrollment is completed for all enrollees, click **Save**.

### Employee enrollment.

To manage Employee Enrollment on behalf of employees, click **Actions** and choose **Start Enrollment** from the drop-down list for each employee.

- ▶ Select coverage options on behalf of employees and dependents. Click **Next**.
- ▶ Employee and dependent information is prefilled from previous screens, simply enter any missing information. Click **Next**.
- ▶ Review the Enrollment Summary and edit information as necessary or print the information if you want. Click **Next**.
- ▶ Now all you need is an Electronic Signature:
  - Before you sign, you must agree to terms and conditions listed.
  - You must also attest that you have the Employee's completed enrollment form with signature on file.
- ▶ Enter the date, your name twice, then click **Submit** to finish enrollment for this employee.

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## Required Documents:

- ▶ Wage and Tax Form.
- ▶ Direct Debit Authorization.
- ▶ Copy of Binder Check.

## ENROLLMENT MANAGER / CLOSE ENROLLMENT.

- ▶ Click **Return to Manage Enrollment**.
- ▶ To view and save or print a copy of the employees' enrollment forms for your files, Click **Actions** and then **View Enrollment**.
- ▶ Scroll through the document to review and then close it.
- ▶ Once all employees have been enrolled, click **Close Enrollment** to end the enrollment period.
- ▶ When enrollment is at 100 percent and the Employer Application has been completed, you will need to upload a few required documents. Click **Upload**, select your file, click **Open**.
- ▶ Click **Finalize Enrollment**:
  - SAM reviews your enrollment to help produce a clean submission. To finalize acceptance, click **Finalize**.
- ▶ Your submission has been sent for Case installation! If accepted, "Acceptance Complete" appears on-screen, including a submission confirmation number. Select **Done**.
- ▶ Once the policy number has been issued it will be updated on your SAM dashboard and you will receive an email confirmation.

**Send Binder Checks (including group name and TIN) to the appropriate Lock Box to ensure timely processing of your payment application:**

SITUS	STREET ADDRESS	OVERNIGHT ADDRESS
All Customers (except CA)	UHS Premium Billing PO Box 959782 St. Louis, MO 63195-9782	UHS Premium Billing #959782 SL-MO-C1WS 1005 Convention Plaza St. Louis, MO 63101
CA Customers	UHC - UnitedHealthcare of California PO Box 843118 Los Angeles, CA 90084-3118	UHC - UnitedHealthcare of California Wells Fargo Bank E2001-049 Lockbox 843118 3440 Flair Drive El Monte, CA 91731

UnitedHealthcare

# SAM

Sales Automation  
Management

## GET STARTED USING SAM – AND BEGIN ENJOYING THE BENEFITS OF FASTER CASE SUBMISSION TODAY!

- ▶ Go to **www.UnitedeServices.com**.
- ▶ Enter User ID and Password. Click **Login**.
- ▶ Choose **SAM**.

If you have any questions about how to enroll a group online, please contact your UnitedHealthcare representative.