Log in

- ➢ Go to www.unitedeservices.com and log in with your existing username/password (or register if you are a new user).
- ➢ Select **Click here to access SAM** on the Home page.

Dashboard

Search for a Case in "Ready" Status

You can search by Legal Name or UHC Policy Number. The drop-down option for Case Number is the UHC Policy Number.

- ➢ Enter the **Case Name** (group name provided in the printed renewal package) in the **Search** box in the upper-right corner.
- ➢ Select the search icon.
- ➢ Click Case that says "Ready" from **Case Search** results. Select **View** (since multiples will show if they quoted in SAM).
- ➢ Select **Quotes** tab.
- ➢ Select **View** next to line that says RNQ under Type. This takes you to the **Review** page. When you do this, an RNA Type line will be created. This is your working file that you will use to complete your renewal submission. This is what you will view if you need to exit and come back to complete your renewal plan changes.

Review

- ➢ Select the **Plan Code** to display the detailed plan benefits.
- ➢ To renew "as is", select **Renew These Plans**.
  Or ….
- ➢ To change plans, select **View Plan Options**. This takes you to the **Consider** page.

Consider

From the **Consider** page, you can review the alternate plan options or shop new plans if you'd like to see the full portfolio including new products.

Steps to Review Alternate Plan Options	Steps to Shop New Plans
Select **View Alternates**.	Select **Shop New Plans**. (link at the bottom of screen under Helpful Links)
Select individual plans from the list or **Select Package** if you want all the plans.	Select the product you want to see. (Medical, Dental, Vision, Life, etc.)
Generate Proposal or, if ready, **Renew These Plans** and move to the **Decide** page.	Select **Add to Quote** for each plan.
	Generate Proposal (or Continue) to move to **Decide**.

Decide

- Select **Decide** in the navigation bar at the top of the screen once you are ready to choose the final plans/products to renew.
- Review all plans previously selected and remove any plans that the employer is not going to offer.
- To deselect plans, use the **Actions** drop-down arrow and then select **Remove This Plan**.
- Pop up box "Are you ready to proceed to the renewal manager?" displays. You can either **Move to Enrollment** (Submit page below) or **Finalize**. Then **Submit** if renewing (as with no enrollment changes).

Submit

- Review to make sure that the only plans selected are the ones that the employer intends to offer for this next plan year.
- From the pop-up window, select **Move to Enrollment**. This takes you to the **Renewal Manager** screen. **Renewal Manager** is like your submission checklist. It helps to make sure you have everything you need to submit this renewal for processing without any delays.

Communication Email Address

- Enter the email address you want us to use when confirming the renewal has been processed or when requesting additional information

Employer Contribution

- Select **Update**.
- Review employer contribution information and update if needed. If there is no update needed, click **Next**. Once this is done, the renewal manager will show this section as "Complete" and reflect the date of completion. You can come back and edit this as long as you have not yet submitted the renewal for processing.

Employee Management

- Select **Update**.
- Choose plans for each enrolling employee and their dependent(s) using the drop-down menu under each product type, **or** select the waive box for any product(s) you are waiving.
- Select **Add an Employee** to add an employee that does not appear on the census.
- Using the **Actions** drop-down arrow, select **Edit Employee** to make changes to employee demographic information (i.e., add/remove dependent, address change, etc.), or select **Remove Employee** to remove an employee from the census.

Employer Information
- ➤ Select **Update**.
- ➤ Review and make changes to the group's employer information (i.e., group's legal name, contact person, billing address, waiting period, deductible accumulation period, etc.). You may also have additional questions that need to be answered at renewal based on updated product offerings. SAM will display an asterisk * to indicate that information is **required**. You will not be able to finalize the renewal until all **required** fields are complete.

Required Documents
- ➤ If no required documents are listed, then skip this step. SAM will show you any documents that are required.
- ➤ For each required document, select **Browse**. Choose the document from your computer and then attach the appropriate file.

Finalize Renewal
- ➤ Once all the sections above have been completed, the **Finalize** button will be activated.
- ➤ Before finalizing the renewal, you may want to **Print** the information under **Selected Plans**. This is the summary of all of the plans that the employer is offering and the enrollment/waiver for each of those plans.
- ➤ Select **Finalize** and then **Submit**.

CONGRATULATIONS! You have taken the simple, automated steps to renew your UnitedHealthcare Small Business group.

Note: If any plan changes were made, all parties attached to the renewal will receive a Plan Change confirmation email: GA, Broker, UnitedHealthcare Renewal Account Representative.

If you need additional support or have questions:
- • **call the SAM Help Line 1-800-486-4585 for technical system questions**
- • **contact your UnitedHealthcare Renewal Representative for plan or market-specific questions**
- • **attend one of the broker training sessions (contact your UnitedHealthcare Renewal Representative for a schedule)**