SAM QUOTE & ENROLL ENHANCEMENTS JOB AID

What's changing? You spoke. We listened! We've enhanced the census and enrollment template and added more flexibility to make changes to your case before submitting to case installation. These changes are effective on 9/18/2017.

Combined Census and Enrollment Template to use for the entire Quote/Enroll process

The **Census Template** (used in both Quote and Enroll) and the **Enrollment Template** (only available in Enroll once you have completed all of the required Census fields) are combined into one template. This combined template can be used for the entire Quote/Enroll process. *Note: The current templates will remain while you adjust to the new combined template. After 90 days, the combined template will be the only option.*

In one template with a SOLD case, upload both census and enrollment data for the quote. Select your plans, then click Enroll. Once you have completed the Employer Application, the employee enrollment will also be complete.

Change Effective Date and/or Drop a Plan in Enrollment when the customer's needs change

1. Click the **Change Effective Date** button on the **Enrollment Manager** screen.
2. You will be prompted to select a new date.
3. Once a new date is selected, the system will confirm that all of your plans are still available for that effective date.
4. You will be prompted if other changes are required.

If a plan doesn't meet participation, you can now DROP that plan or plans instead of re-quoting the group. If the employer decides not to offer a plan any longer while you are in enrollment, you can also drop that plan as long as it doesn't break any plan combination rules. Choose **Remove Plans** from the **Enrollment Manager** screen.

For technical support or questions on how to use the tool, please contact us at 800-486-4585. The SAM Support Team is available Monday through Friday 8 a.m. - 8 p.m. EST.
For specific questions related to product selections or availability, please contact your UnitedHealthcare Sales Representative.

1 | Combined Census and Enrollment Template

When Quoting, Employee Census now has two choices:

- **Quote Census** (available for 90 days only)
- **Combined Census & Enrollment Template**

Quote Census

1. Quote Census downloads the existing template. It works exactly like it works today.

   Note: Import errors window displays if there are errors.

1 | Combined Census and Enrollment Template

Combined Census & Enrollment Template

The **Combined Census & Enrollment Template** downloads a blank template that can be re-used for different customers.

The only field validations completed are the fields required for quoting. The Error log is the same.

Any information other than the fields required for quoting will be retained and validation for these fields will be done when opening Employee enrollment.

1. Click **Begin Enrollment**.

2. Under **Enrollment Spreadsheet**, click **Export Enrollment Template**. It will show all completed, in progress and not started employees. The template will remain available even after all employees are in completed status

   Note: Do not re-use for multiple customers since it will have pre-populated fields specific to the customer.

1 | Combined Census and Enrollment Template

3. Click **Log Report** to display employees with errors (if any).

2 | Change an Effective Date or Drop a Plan

Top of Screen

Bottom of Screen

1. Scroll down to the bottom of the **Enrollment Manager** screen and click **Change Effective Date** or **Remove Plans**.

2 | Change an Effective Date

2

Update Effective Date

Enrollment Status: **Enrollment Review**

To update the effective date choose the new effective date below, and click "Continue". Click "Cancel" to retain the original effective date and return to the Enrollment Manager.

* Requested Effective Date: mm/dd/yyyy

[Cancel] [Continue]

3

Update Effective Date

The effective date change does not impact the plan availability, or the premium.

Click "Continue" to move forward with the enrollment process with the updated effective date.

Click "Cancel" to return to the Enrollment Manager to retain your original effective date and plan selections.

[Cancel]   [Continue]

4

Update Effective Date

Your requested effective date change to <<Eff Date Requested>> has impacted the availability of the plans you selected for enrollment. Click "Re-Quote" if you wish to withdraw enrollment, copy this quote, change to desired effective date and view the available plans and make selections, or click "Cancel" to return to the Enrollment Manager to retain your original effective date and plan selections.

[Cancel]   [Re-Quote]

2. Enter the new date in the **Updated Effective Date** field and click **Continue**.

3. **If neither Plan Availability nor Premiums are impacted**, move forward to change the effective date. Click **Continue**. You will return to the Enrollment Manager where the new effective date is listed.

4. **If Plan Availability is impacted**, you must re-quote before changing the effective date. Click **Re-Quote** to automatically withdraw the enrollment with "other" as the assigned reason. You will go to the **Copy Quote** section. You will be required to update the effective date manually.

Note: If there is a premium difference, you will be asked to accept the updated premium before finalizing the case.

3 | Drop a Plan in Enrollment

1. If an employer chooses to remove a plan, click **Remove Plans**. The **Product and Plan Removal Confirmation** screen displays. Select the plans you want to remove.

3 | Drop a Plan in Enrollment

2. Click **Continue** to trigger the product/plan combination validation and to review the impact of employee enrollments completed or in progress.

3. Click **Continue** to go back to **Enrollment Manager** where all plans are removed from the **Enrollment Manager Plan Selected** section.

   Note: The Employer Application and Employee Enrollment is re-opened if employees are impacted by the plan removal.

3 | Drop a Plan in Enrollment

If a plan needs to be removed because it doesn't meet participation:

1. When you click **Finalize Enrollment** from the **Enrollment Manager** screen, you will be notified if a product does not meet participation.

3 | Drop a Plan in Enrollment

2. If you want to remove the plan and proceed with the submission, click **Remove Plans**. If you want to make changes to the plans and generate a new proposal, click **Re-Quote**.

3. When you click **Remove Plans**, the **Product and Plan Removal Confirmation** screen displays. Only the products/plans that failed participation will display.

   Note: Removing plans must not violate product/plan combination rules.

4. Click **Continue** to review the impact to employee enrollments completed or in progress.

3 | Drop a Plan in Enrollment

5. Click **Continue** to review the impact to employee enrollments completed or in progress.

6. Click **Continue** to go back to **Enrollment Manager** where all plans are removed from the **Enrollment Manager Plan Selected** section.

   Note: The Employer Application and Employee Enrollment is re-opened if employees are impacted by the plan removal.