

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

Census Information (*Required Fields)			Either Birth Date Of Either Birth Date OR Age are required								
Member ID	*Sequence No	*Relationship to Employee (Employee, Spouse, Child)	Location	Last Name	First Name	*Gender	*Birth Date (MM/DD/YYYY)	*Age (As of Effective Date)	*Smoker	Smoking Cessation	*Err Stat

1

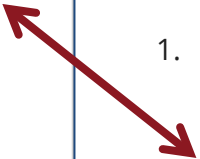
When Quoting, Employee Census now has two choices:

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

Import errors X

The following errors have been found in your census file. Please address these errors and import again.

Location	Description
Y8	The Dental coverage type field is required. Please enter a value.
H9	The Relationship field is required. Please enter a value.
J10	The Date Of Birth field or Age is required for import. The household record will not be loaded until this error is corrected.
Y10	The Dental coverage type field is required. Please enter a value.
J11	The Date Of Birth field or Age is required for import. The household record will not be loaded until this error is corrected.
H11	The Relationship field is required. Please enter a value.
H12	The Relationship field is required. Please enter a value.



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

	B	D	E	F	G	H	I	J	K	L	M	N
1	Required for Import Process Execution (Once Only and Based on Unique Importer Number)	Required for Import Process Execution	Required for Import Process Execution	Optional (Not needed for Import Process or Enrollment Submission)	Required for Import Process Execution	Required for Import Process Execution	Required for Import Process Execution	Required for Import Process Execution	Field not required for Enrollment form but conditionally required for Census if Smoker = Yes	Required for Import Process Execution	Required for Import Process Execution (Employee Record only)	Field is not required for Enrollment form but required for Census. Enrollment is performed with employee location associated with the Group
2	Sequence Number	Type	First Name	Middle Initial	Last Name	Relationship	Date Of Birth	Smoker	Smoking Cessation	Gender	Status	Location
3												
B 1	Employee	One			Employee		02/04/1988	No	No	Male	Active	Testing
B 2	Employee	Two			Employee		02/04/1988	No	No	Female	Active	Testing

2

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.

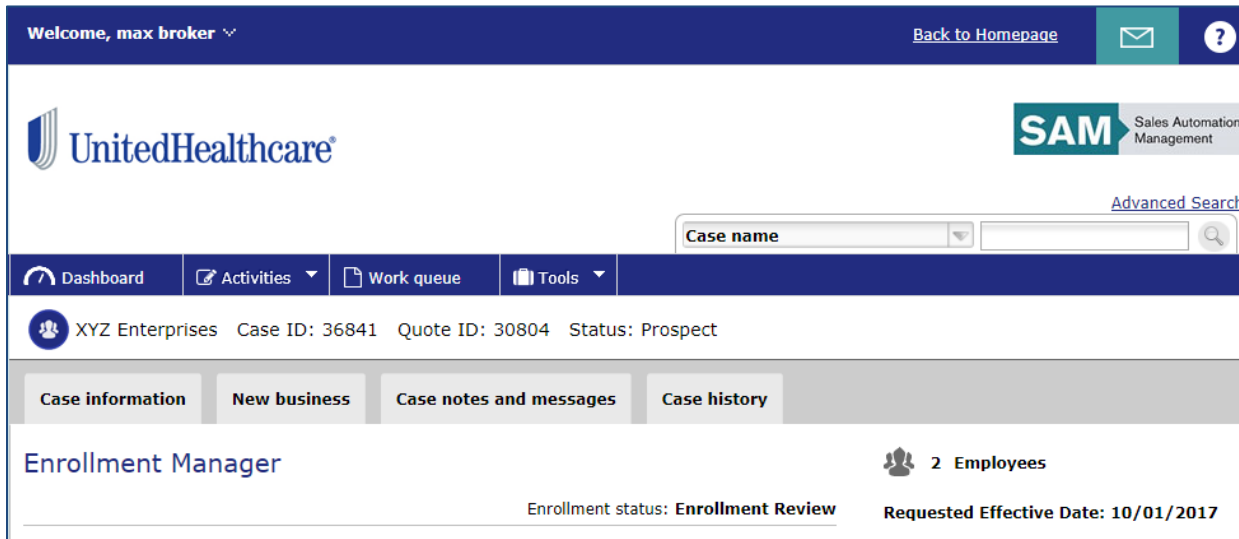
1 | Combined Census and Enrollment Template

ReportLog_2 - Microsoft Excel						
Import Process Successful						
A	B	C	D	E	F	G
1	Import Process Successful					
2	2	Records Provided				
3	0	Records Processed				
4	5	Errors Occurred				
6	Sequence Number	First Name	Last Name	Location	Description	
7	1			AO8	The Medicare Primary? field is required. Please enter a value.	
8	1			AO9	The Medicare Primary? field is required. Please enter a value.	
9	2			AO10	The Medicare Primary? field is required. Please enter a value.	
10	2			AO11	The Medicare Primary? field is required. Please enter a value.	
11	2			AO12	The Medicare Primary? field is required. Please enter a value.	

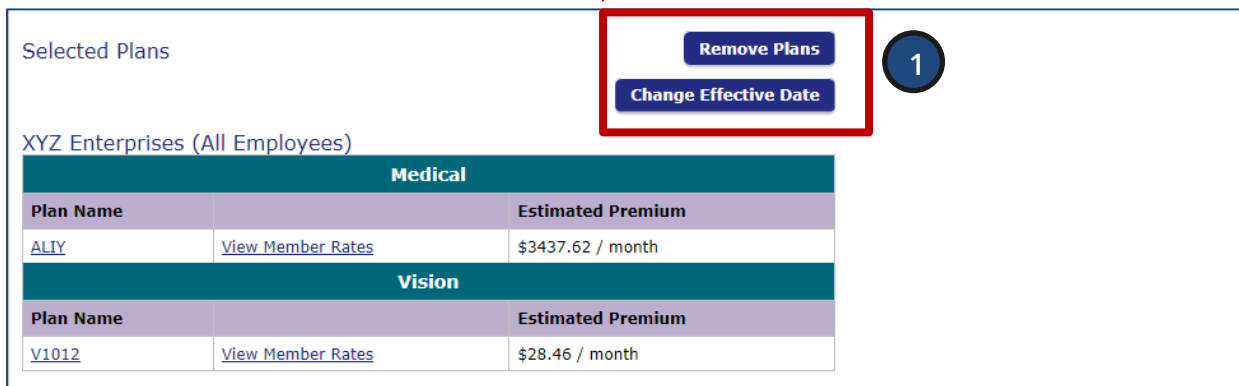
3. Click **Log Report** to display employees with errors (if any).

2 | Change an Effective Date or Drop a Plan

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



Top of Screen



Bottom of Screen

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: **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

Products and Plan Removal Confirmation

Update Options

The following is a list of all your selected plan(s);

1. Select the check box next to the products/plans you wish to remove.
2. If you want to keep a plan it will require additional enrollment.
3. Click Continue when you are ready to proceed with plan removal.
4. Update any necessary employee enrollments.
5. Finalize the case.

Note: Any changes made on this page will not be saved if you click Cancel.

Product	Plan Code
<input type="checkbox"/> Medical	<input type="checkbox"/> ALIY
<input type="checkbox"/> Vision	<input type="checkbox"/> V1012

Cancel 1 Re-Quote Continue

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

Update Employee Enrollments

Update Options

Upon Clicking Continue will remove the following plans originally offered to your employees:

V1012 - Vision

The following employee(s) have been impacted by this change, employees will need to be informed if products are no longer available and an updated enrollment will be required if they need to change plans:

Robert Smith
Spouse: Deb Smith
Child: Emma Smith

Chris Johnson
Spouse: Angela Johnson

Update Enrollments on behalf of impacted employees.

Notify employees to update their online enrollment.

Updated Closing Date: 09/21/2017

No employee updates are needed.

Previous **Continue**

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

UnitedHealthcare **SAM** Sales Automation Management

[Advanced Search](#)

Case name

Dashboard | Activities | Work queue | Tools

XYZ Enterprises Case ID: 36841 Quote ID: 30804 Status: Prospect

Case information | New business | Case notes and messages | Case history

Enrollment Manager

Enrollment status: **Enrollment Review**

Requested Effective Date: 10/01/2017

2 Employees

The following is a summary of the case and enrollment activity information.

Enrollment Setup
 Employee Enrollment
 Final Acceptance

Finalize Enrollment Finalize Enrollment 1 Not started

Before the enrollment information can be sent to UnitedHealthcare, you must finalize enrollment.

Case Information -- 36841

Name: XYZ Enterprises
Case ID: 36841
Original Quote ID: 30283
Doing Business As:
Address: 123 Restaurant Row
 Hartford, CT 06013

Primary Contact

Chris Johnson

Case Owners

Producer: max a broker
 jqulici@outlook.com
Sales Rep:

Employee enrollment Completed: 09/11/2017

To open enrollment to employees first verify the enrollment census. Once complete you can choose to notify employees to enroll or you may complete the enrollment on their behalf.

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

Enrollment Manager

Enrollment status: **Enrollment Review**

Enrollment Manager-Finalize Acceptance

There are plans that have failed participation:

An Employer Group contributing between 75 and 100% toward Vision coverage must have at least 50% of total eligible employees enrolling in vision coverage.

To remove plans that do not meet participation, click **Remove Plans**.
 You can then proceed with the submission process.
 To remove or change product or plan offerings for this group, and to generate a new proposal, click **Re-Quote**.
 To return to the Enrollment manager with no changes click, **Cancel**.

For questions or concerns, please contact your Account Executive.

Please refer to your states Underwriting Guidelines for specific information on participation and eligibility.

Cancel
2
Re-Quote
Remove Plans

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.

Products and Plan Removal Confirmation

Update Options

The following products/plans have failed the minimum participation requirement.

- Select the check box next to the products/plans you wish to remove.
- If you want to keep a plan it will require additional enrollment.
- Click Continue when you are ready to proceed with plan removal.
- Update any necessary employee enrollments.
- Finalize the case.

Note: Any changes made on this page will not be saved if you click Cancel.

Product	Plan Code
<input type="checkbox"/> Vision	V1012

Cancel
3
4
Re-Quote
Continue

3 | Drop a Plan in Enrollment

Update Employee Enrollments ✕

Update Options

Upon Clicking Continue will remove the following plans originally offered to your employees:

V1012 - Vision

The following employee(s) have been impacted by this change, employees will need to be informed if products are no longer available and an updated enrollment will be required if they need to change plans:

No Employees Impacted

Update Enrollments on behalf of impacted employees.

Notify employees to update their online enrollment.

Updated Closing Date: 09/21/2017

No employee updates are needed.

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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.