



Small Business Broker and Agency Training Catalog

Summer 2024

**United
Healthcare®**

Join us for the 2024 Summer Broker and Agency Webinar Series

Sharpen your skills and knowledge with UnitedHealthcare Fully Insured, UnitedHealthcare Level Funded, and services and processes for small business through our 2024 Summer Broker and Agency Webinar Series. With over 100 informative and engaging webinars on topics such as UHC Rewards, UnitedHealthcare pharmacy strategy, Benefitter training and more, our webinars are designed to help you gain an even better understanding of UnitedHealthcare products and services.

Make sure you and your agency are up to date on our most current products, sales and renewal tools, wellness programs, member service tools and everything else you need to know to be an invaluable resource to your clients. The trainings and information in these webinars will help position you to increase sales and retention, efficiently serve your clients and give you the tools to maximize success this year and beyond.

Please review our 2024 summer webinar catalog and join us for the webinars that best set you and your agency up for success.

For more information, please contact your UnitedHealthcare representative.



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Topic listing and descriptions

Advanced Benefitter Training

Benefitter is a small group quote-to-enroll platform for Small Business medical and specialty lines that was designed for and by agents to help you earn more in less time. This training is designed to provide in-depth walk-through of different enrollment and submission options and give you the opportunity to ask questions. Please ensure you have completed the Basic Benefitter Training prior to attending the Advanced Benefitter Training. It is important to have this comprehensive background beforehand.

Advanced Sales Strategy—Decoding Our Level Funded Product

Expand your expertise on the benefit options and capabilities of our lead Small Business product, Level Funded. You will learn the subtle nuances within Level Funded, including the different benefit and capability options. You will leave this training with the confidence to quote and sell UnitedHealthcare Level Funded as a solution for the employers you work with.

Advanced Sales Strategy—UnitedHealthcare Fully Insured and Level Funded in Small Business

This session will focus on new business sales strategies that will separate brokers from your competition, leading with UnitedHealthcare Level Funded, followed by our combined approach of Level Funded and Fully Insured in the small business space. Join us to learn about best practices and strategies that will wow your prospects and clients and show them you are their small business group benefits expert.

Basic Benefitter Training

Benefitter is a small group quote-to-enroll platform for Small Business medical and specialty benefits that was designed for and by agents to help you earn more in less time. This training is designed to provide a comprehensive overview of how to use the Benefitter platform. We begin at the agent homepage, move to the client homepage, create a proposal, seamlessly transition from a proposal to an enrollment, multiple enrollment options, and end with a review of submission options and time for questions and comments.

Employee Navigator Capabilities for UnitedHealthcare Small Business

Benefits administration technologies allow brokers to more easily manage their book of business, especially with regard to new hires, terminations, open enrollment and reporting. This session will provide a high-level overview of how you can utilize Employee Navigator integrations with UnitedHealthcare to make it easier to build out groups and digitize the enrollment experience.

New Business Broker and Agency 101 Training

This session is designed to show you how easy it can be to quote and enroll new UnitedHealthcare groups in the Small Business space. We will review the “quote to card” process, how to read our Small Business quotes, and our combined Fully Insured, Level Funded and Specialty products approach in most markets. We will share our best practices to ensure you are obtaining the most competitive multi-line UnitedHealthcare quotes for your clients as quickly and efficiently as possible.

See how we have simplified the enrollment process for new groups through our innovative SAMx portal and where to go for any needs during the quoting and implementation process.

Product and Network 101 – Broad and High-Performing Networks and Plan Types

This overview will highlight our networks you may see on your quotes and renewals, UnitedHealth Premium® designation program, and explore best practices when presenting UnitedHealthcare networks and products to clients. When it comes to selecting plan options, you will come away from this training with a good idea how to identify which clients are a good fit for each plan type and network options offered in the small business space.

Renewal Broker and Agency 101 Training—The Tools to Renew and Service UnitedHealthcare Fully Insured and Level Funded Like a Pro

This training will provide a review of the renewal process and explain how to read our Small Business quotes. We will discuss our approach to the variety of product offerings we have, including Fully Insured, Level Funded and Specialty. We will share our best practices to ensure you are obtaining the most competitive multi-line UnitedHealthcare quotes for your clients as quickly and efficiently as possible.

See how we have simplified the renewal process for existing groups through our innovative SAMx portal and where to go for any needs during the process.

The Most Important Things to Know About Working with UnitedHealthcare Small Business

Join this session to learn helpful tips and tricks surrounding the quoting, installation and service of, and renewing your small group customers with UnitedHealthcare. From self-service tools on uhceservices.com to utilizing our sales representatives and service teams, we will guide you to the most efficient processes and paths to success.

UnitedHealthcare Level Funded Renewals and Conversion Process

This training will highlight the process of converting UnitedHealthcare Fully Insured groups to UnitedHealthcare Level Funded. We will review how to request quotes from your Renewal Account Executive, necessary documents to submit a conversion, and best practices to help ensure an efficient transition. We will highlight the basics of how to understand a renewal packet, process a renewal and run alternate renewal quotes.

UnitedHealthcare Level Funded Executive Summary Review for Brokers

This presentation will provide a deep dive into the layers of information available for your UnitedHealthcare Level Funded plan. The session will focus on how to interpret and understand the utilization data provided in the report as well as address frequently asked questions and enhancements scheduled for 2024. The goal is to help brokers and employers achieve a more comprehensive understanding of not only how your UnitedHealthcare Level Funded group is performing at a given point in time, but also how to share this information most effectively.

UnitedHealthcare Pharmacy Strategy for Your Clients

The UnitedHealthcare Pharmacy team will present a review of our pharmacy management, member experience, cost-reduction and opioid-management strategies. This presentation aims to give you a better understanding of UnitedHealthcare and industry-wide drug coverage decisions, and the tools you need to better coach your clients through the complicated web of medications in the marketplace. We will offer a comparison of our Prescription Drug Lists (PDLs) to help you understand which PDL may best fit your clients' needs.

UnitedHealthcare Rewards (UHC Rewards) Wellness Program for Level Funded and Fully Insured

Our newest wellness innovation, UHC Rewards, promotes better overall health for our members. This is more than a fitness and wellness program—UHC Rewards goes a step further by combining the best practices from existing incentive programs and consolidating them into an easy-to-access new offering. Participants can earn financial rewards by reaching daily goals while personalizing their experience and selecting activities that are right for them. This program is currently included on all 2–50 Fully Insured and Level Funded groups. Join this webinar to learn how to educate your clients on this exciting program.

UnitedHealthcare Level Funded Intro and New Business

UnitedHealthcare Level Funded is a partially self-funded health plan designed specifically for small businesses. During this introduction, we will examine how to identify ideal candidates for this product, review plan design and cover pricing methodology. If you are new to UnitedHealthcare Level Funded, or have been selling it for years, you will benefit from an overview on this product and the enhancements we have made.

UnitedHealthcare Specialty Benefits Overview — Dental, Vision and Financial Protection

Please join our UnitedHealthcare team to learn the benefits of selling Dental, Vision, Life and Disability alongside our Medical products. We will highlight key features that differentiate our Specialty products from other carriers. We will provide an overview on the ease of adding Specialty to your quotes, best practices for selecting plans and what this will look like for both broker and employer administration after the group is installed. You will learn about the savings initiatives we have in place and how putting all lines of medical and specialty with UnitedHealthcare can benefit you as the broker.

Webinar session title	Start/end time	Location
Advanced Benefitter Training	Click registration link for training availability	Register for this webinar
Advanced Sales Strategy— Decoding Our Level Funded Product	June 12, 2–3 p.m. CT	Register for this webinar
	July 10, 2–3 p.m. CT	Register for this webinar
	Aug. 7, 2–3 p.m. CT	Register for this webinar
	Sept. 11, 2–3 p.m. CT	Register for this webinar
Advanced Sales Strategy— UnitedHealthcare Fully Insured and Level Funded in Small Business	June 25, 1–2 p.m. CT	Register for this webinar
	July 23, 11 a.m.–12 p.m. CT	Register for this webinar
	Aug. 27, 1–2 p.m. CT	Register for this webinar
	Sept. 24, 11 a.m.–12 p.m. CT	Register for this webinar
Basic Benefitter Training	Click registration link for training availability	Register for this webinar
Employee Navigator Capabilities for UnitedHealthcare Small Business	June 20, 1–2 p.m. CT	Register for this webinar
	July 18, 1–2 p.m. CT	Register for this webinar
	Aug. 15, 1–2 p.m. CT	Register for this webinar
	Sept. 5, 1–2 p.m. CT	Register for this webinar
New Business Broker and Agency 101 Training	June 5, 10–11 a.m. CT	Register for this webinar
	July 17, 12–1 p.m. CT	Register for this webinar
	Aug. 8, 10–11 a.m. CT	Register for this webinar
	Sept. 12, 11 a.m.–12 p.m. CT	Register for this webinar
Product and Network 101 – Broad and High-Performing Networks and Plan Types	June 27, 12–1 p.m. CT	Register for this webinar
	July 23, 12–1 p.m. CT	Register for this webinar
	Aug. 28, 12–1 p.m. CT	Register for this webinar
Renewal Broker and Agency 101 Training – Tools to Renew and Service UnitedHealthcare Fully Insured and Level Funded Like a Pro	June 19, 1–2 p.m. CT	Register for this webinar
	July 11, 12–1 p.m. CT	Register for this webinar
	Aug. 6, 1–2 p.m. CT	Register for this webinar
The Most Important Things to Know About Working with UnitedHealthcare Small Business	June 19, 10–11 a.m. CT	Register for this webinar
	July 10, 10–11 a.m. CT	Register for this webinar
	Aug. 21, 10–11 a.m. CT	Register for this webinar
	Sept. 11, 10–11 a.m. CT	Register for this webinar

Webinar session title	Start/end time	Location
UnitedHealthcare Level Funded Renewals and Conversion Process	June 25, 11 a.m.–12 p.m. CT	Register for this webinar
	July 11, 10–11 a.m. CT	Register for this webinar
	July 25, 11 a.m.–12 p.m. CT	Register for this webinar
	Aug. 6, 10–11 a.m. CT	Register for this webinar
	Aug. 20, 10–11 a.m. CT	Register for this webinar
	Sept. 25, 11 a.m.–12 p.m. CT	Register for this webinar
UnitedHealthcare Level Funded Executive Summary Review for Brokers	June 11, 1–2 p.m. CT	Register for this webinar
	July 16, 1–2 p.m. CT	Register for this webinar
	Aug. 13, 1–2 p.m. CT	Register for this webinar
	Sept. 10, 1–2 p.m. CT	Register for this webinar
UnitedHealthcare Level Funded Intro and New Business	June 5, 11 a.m.–12 p.m. CT	Register for this webinar
	July 17, 10–11 a.m. CT	Register for this webinar
	Aug. 14, 10–11 a.m. CT	Register for this webinar
	Sept. 18, 10–11 a.m. CT	Register for this webinar
UnitedHealthcare Pharmacy Strategy for Your Clients	July 9, 1–2 p.m. CT	Register for this webinar
	July 25, 10–11 a.m. CT	Register for this webinar
	Aug. 14, 1–2 p.m. CT	Register for this webinar
UnitedHealthcare Rewards (UHC Rewards) Wellness Program for Level Funded and Fully Insured	June 26, 10–11 a.m. CT	Register for this webinar
	July 18, 10–11 a.m. CT	Register for this webinar
	Aug. 22, 11 a.m.–12 p.m. CT	Register for this webinar
	Sept. 18, 1–2 p.m. CT	Register for this webinar
UnitedHealthcare Specialty Benefits Overview – Dental, Vision and Financial Protection	June 13, 10–11 a.m. CT	Register for this webinar
	July 24, 1–2 p.m. CT	Register for this webinar
	Aug. 27, 10–11 a.m. CT	Register for this webinar
	Sept. 12, 1–2 p.m. CT	Register for this webinar



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Insurance coverage provided by or through UnitedHealthcare Insurance Company or its affiliates.

Administrative services provided by United HealthCare Services, Inc. or their affiliates.

Administrative services provided by United HealthCare Services, Inc. or their affiliates, and UnitedHealthcare Service LLC in NY. Stop loss insurance is underwritten by All Savers Insurance Company (except CA, MA, MN, NJ and NY), UnitedHealthcare Insurance Company in MA and MN, UnitedHealthcare Life Insurance Company in NJ, UnitedHealthcare Insurance Company of New York in NY, and All Savers Life Insurance Company of California in CA.

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