



Small Business Case Submission Checklist

Case Submission Options

Format		Expected Turnaround
Self-service SAM (Sales Automation Management)	UnitedeServices.com	Same Day/24 Hours (Click here for SAM training info.)
CO Installation Department email	co_sb_new_groups@uhc.com Be sure to include customer name in subject line.	2–4 Business Days Once all required information is received. Turnaround time may increase during periods of high volume (typically month end and fourth quarter).

Required Documents

Documents listed are required. Submitting a partial case will only delay installation, as we cannot move forward until all information is received. Additional items may be required to complete installation.

Benefit Selection Form

- [Benefit Selection Form](#)

Employer Application

- [ER Application](#) (All required fields are highlighted)
- [Common Ownership](#) (if applicable)

Copy of Binder check OR Direct Debit Form

- [Direct Debit Form](#)
Required for groups with 3 and fewer enrolling.
- ***Please note: If you are submitting a binder check write the policy # on the check and remit to:**
UHS Premium Billing
PO Box 94017
Palatine, IL 60094-4017

Sold UnitedHealthcare Quote *This allows us to confirm rates.*

Tax Documents

- [Tax Requirements](#)
- [Participation Certification](#)
For groups with 10 or more eligible employees.

Employee Enrollment Information

- [Universal Spreadsheet Template](#)
Suggested for groups with 10 or more enrolling subscribers to expedite installation process.
**Please note: SAM spreadsheet must still be used for case submissions directly into SAM if using spreadsheet option for enrollment. For the best user experience, use a modern browser such as Chrome, Firefox, Safari or Edge*
- [Medical Enrollment Form](#) (Required fields are highlighted)
- [Specialty Enrollment Form](#) (if applicable) CONTINUED

Select above hyperlinks to download documents.

New Business Expectations

Late Submissions	Cases received after the 20th of the month prior to effective date may not be installed by the effective date.
Electronic Funds Transfer (EFT)—Draft Schedule	<ul style="list-style-type: none">• Cases completed by the first of the month, EFT will be processed the 10th of the following month.• Cases completed after the first of the month, EFT will be delayed.
Member Seeking Services	Please remind members to schedule non-emergency services after they have received their health plan ID cards whenever possible.
Prescriptions	Please encourage members to fill their prescriptions the month prior to switching carriers to ensure they have medications throughout the transition.
ID Cards	<ul style="list-style-type: none">• Cases completed prior to the 15th of the month: Members should receive hard-copy ID cards by their effective date.• Hard-copy ID cards arrive 7–10 business days after the policy number is released.• Subscribers can download/print temporary ID cards by activating their myuhc.com® account 24-72 hours after the policy number is released (on/after effective date).



Contact your local UnitedHealthcare representative with any questions.

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