

Specialty Portfolio Offering with All Savers Alternate Funding Option

Broker Specialty Install Checklist


Needed For Every Group

The All Savers quoting tool should be used to quote selected plan designs for the following Specialty coverages with installation on the All Savers UHOPS platform:

- Fully Insured Dental
- Basic Life and AD&D
- Fully Insured Vision

Note: If a group is interested in a plan design not offered on the All Savers quoting tool, brokers should contact their UnitedHealthcare Account Executive for a quote and installation on a different UnitedHealthcare administrative platform.

Upload the following Attachments for Sold cases:

1. Signed Specialty **group application** 
2. Final rates for every plan
3. Signed **Specialty member enrollment form** for all eligible employees OR enrollment spreadsheet

****It is possible that you have to collect 3 employer applications; 1- Medical, 2- Dental/Vision, and 3- Life****

Do not send both an **enrollment spreadsheet and enrollment forms**.* The enrollment spreadsheet is the best way to ensure accuracy (verify that ALL required columns are complete).

Is this an off-renewal install? Please reach out to your UnitedHealthcare Account Executive to confirm final rates and ensure alignment with the medical renewal date (e.g., Medical installed January 1, 2017, and specialty installed February 1, 2017).

Verify that all products meet the participation requirements for that plan code.

Packaged Savings®:

Packaged Savings® credit(s) will be applied to the All Savers Medical billing invoice. If eligible specialty products are installed on another platform (PRIME) or FACETS for financial protection products, note this in the “notes section” of the All Savers quoting tool. Also indicate product and effective date. This will ensure Packaged Savings credit(s) are properly set up during the All Savers Medical case installation.



Dental

For Dual Option




1. A valid dual option combination is allowed.
 - The two plans should be a logical plan combination (e.g., high and low options, in-network and non-network options).
 - Plans must differ by more than just a single benefit feature on one plan, (e.g., deductibles, coinsurance, and/or annual maximum).
 - There must be a 20% differential between the two plans.
2. When two PPO plans are offered as dual option a combined minimum of 10 enrolled subscribers is required: Available to groups with 10 or more enrolled (not eligible) subscribers or more. A minimum of 10 eligible and 8 enrolled is required for any PPO plan that includes orthodontia

Examples of Valid and Invalid Combinations:

Dual Option Dental	
Valid	Not Valid
1P800 and 1P801	1P802 and P4878
1P803 and P4884	P4884 and 1P804
P4884 and P0206	1P808 and P3383

3. Employee plan elections must be indicated on the enrollment spreadsheet.

For Consumer MaxMultiplier® Rollover Credit send current carrier report to UnitedHealthcare Account Executive. See attached documents below for instructions.

- Loading CMM Accumulator Letter 
- Electronic Accumulator Load 
- CMM FAQ 

Consumer MaxMultiplier® Rollover Credit:

You will need to get a report from the current carrier, including this information:

- Member name
- Member SSN
- Accumulator amount
- Accumulator type (CMM)



Basic Life

Employees Electing Over the Guarantee Issue Benefit Amount (GI)

1. The request to install should be for the FULL benefit.
2. Evidence of Insurability (EOI) forms are located on the All Savers quoting tool (myallsavers.com).
3. EOI forms are not sent to All Savers, they are sent to eoi_underwriting@uhc.com.