E-Store
All Quote & Enroll Options

United Healthcare

Broker Portal – Log In

www.uhone.com/broker



Welcome to E-Store

Welcome to Broker E-Store! Access the tools and resources you need to quote, grow and retain your business. Log in now using your One Healthcare ID.

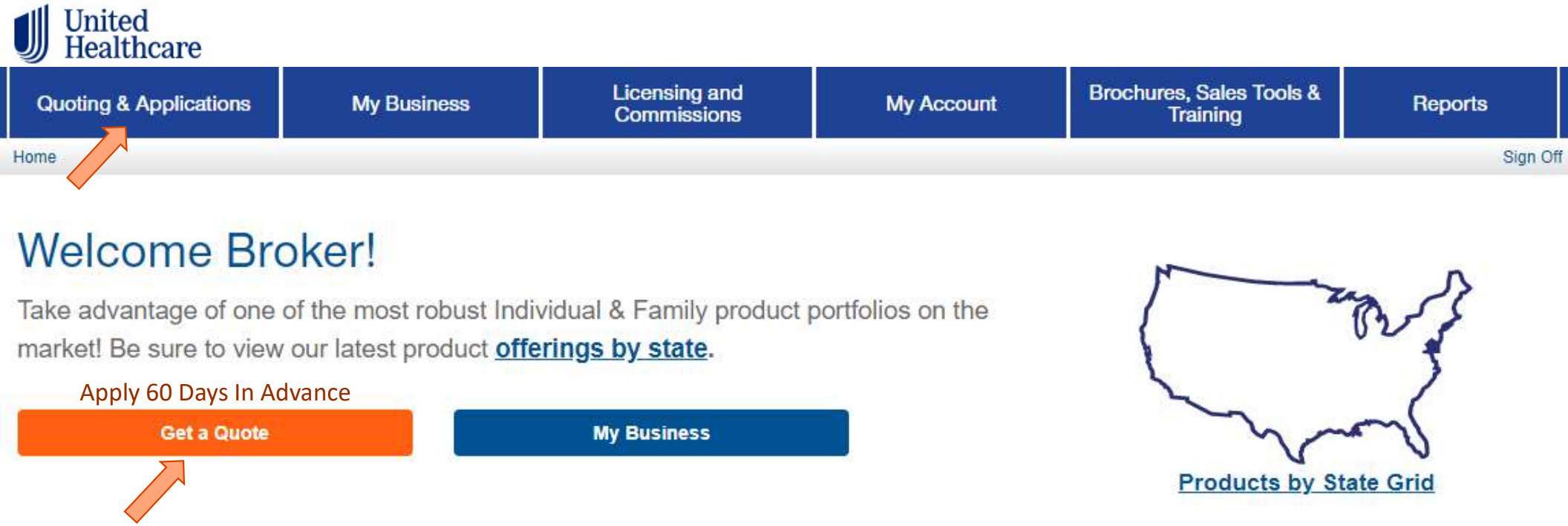
If you do not have an One Healthcare ID, select "Create An Account" below.

Sign In with One Healthcare ID

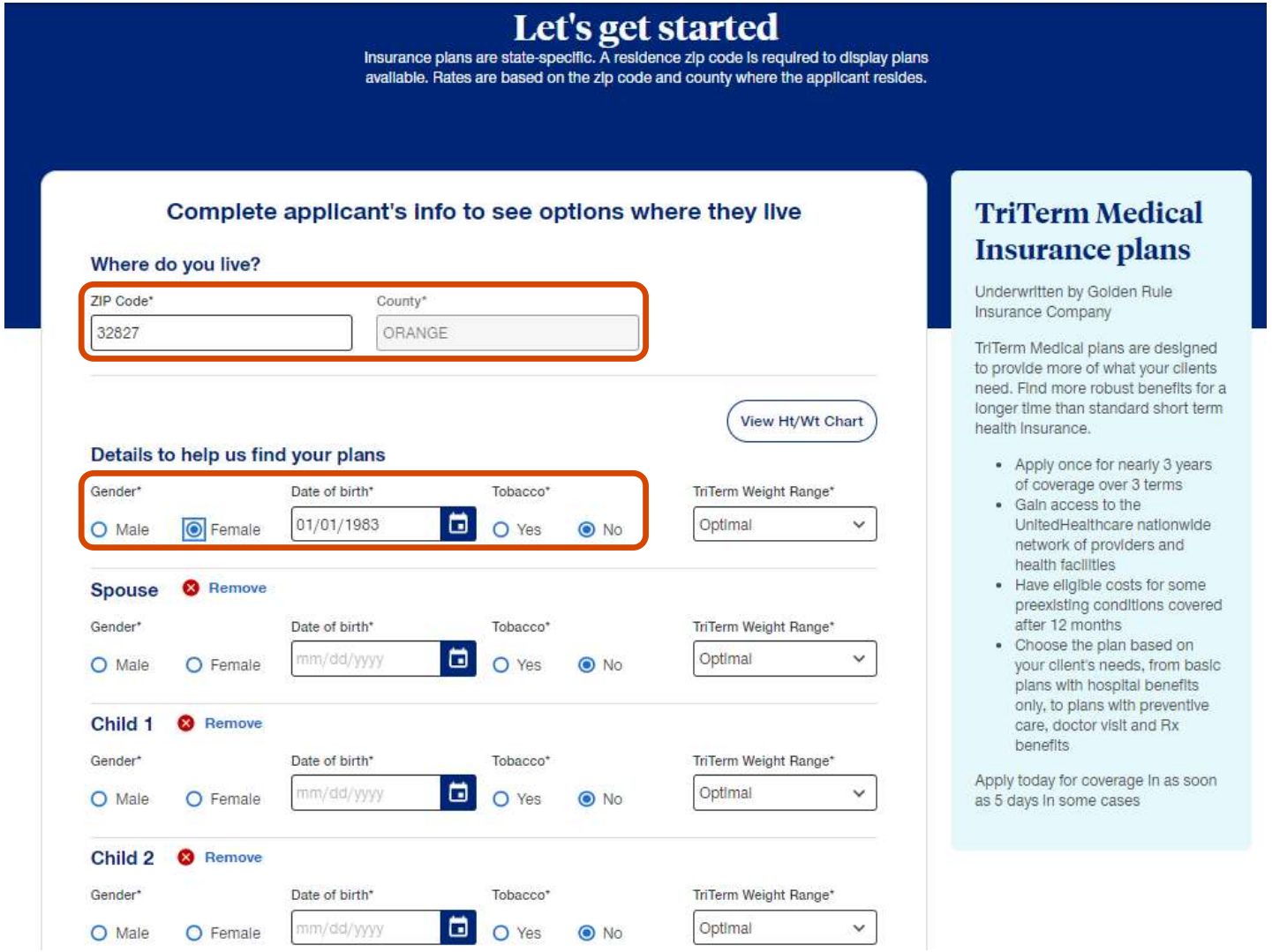
Convenient Access to UnitedHealthcare Individual Line of Products

Create An Account

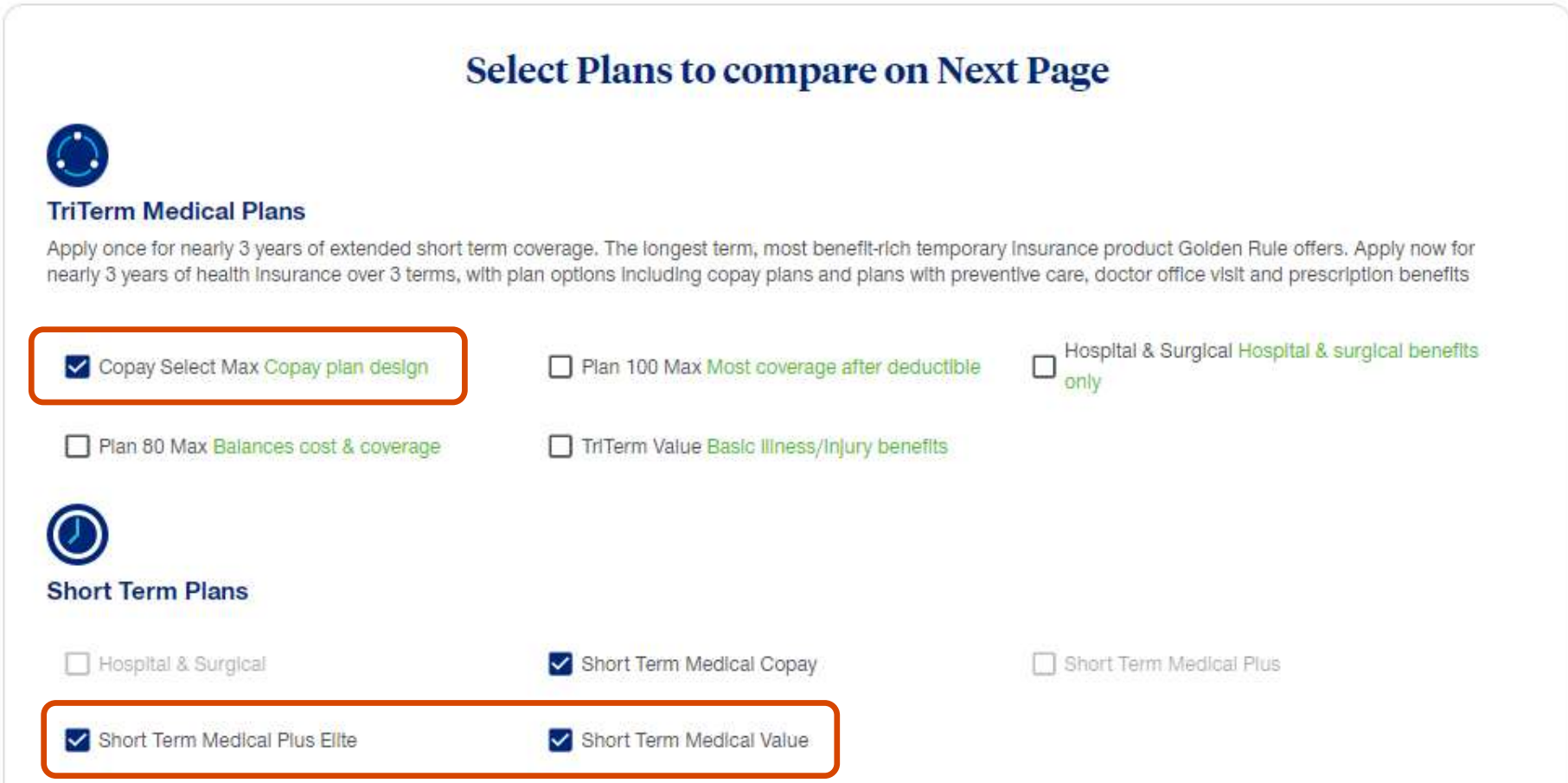
Broker Portal – Quote & Enroll



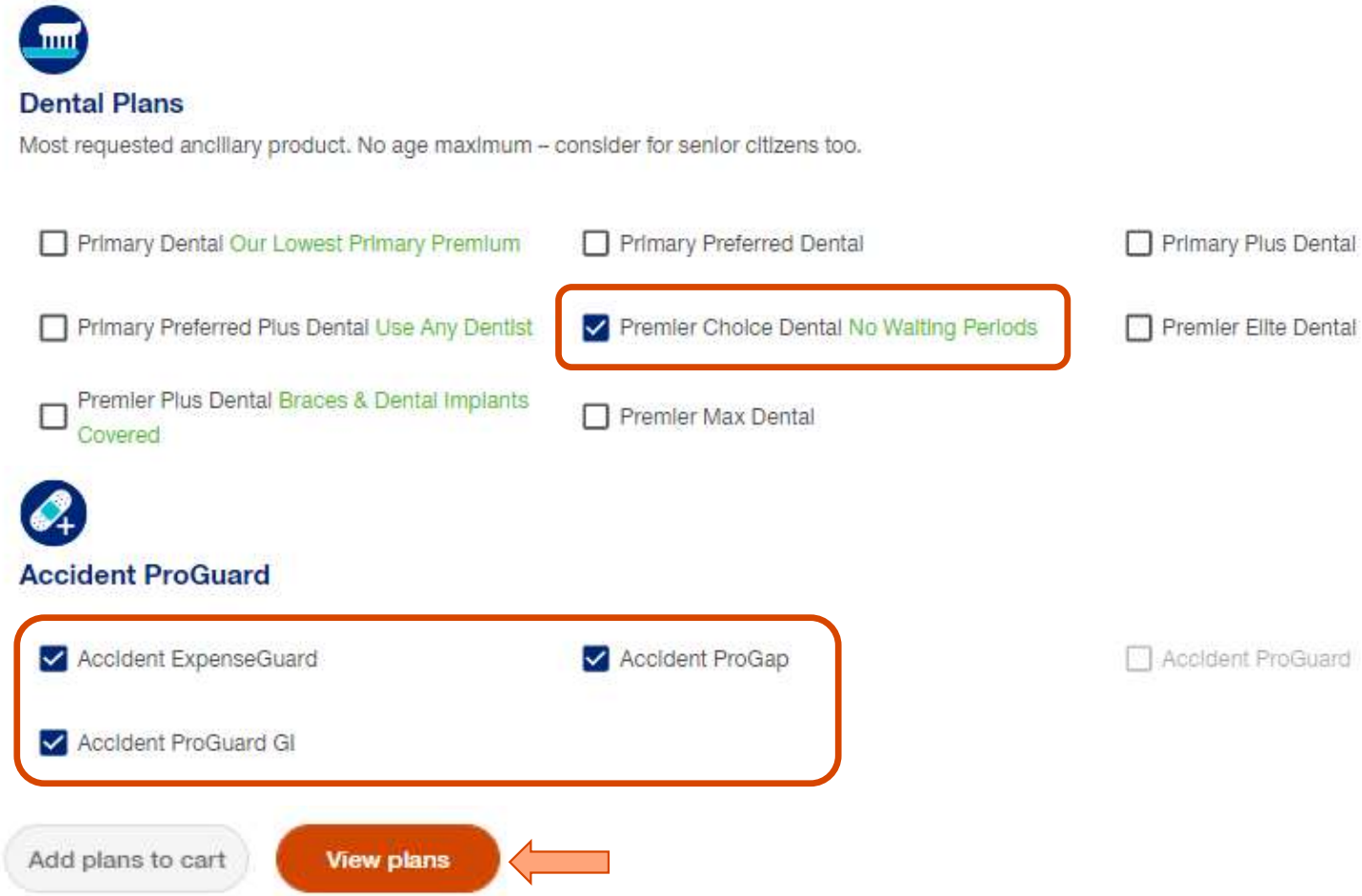
Quote & Enroll – Demographics



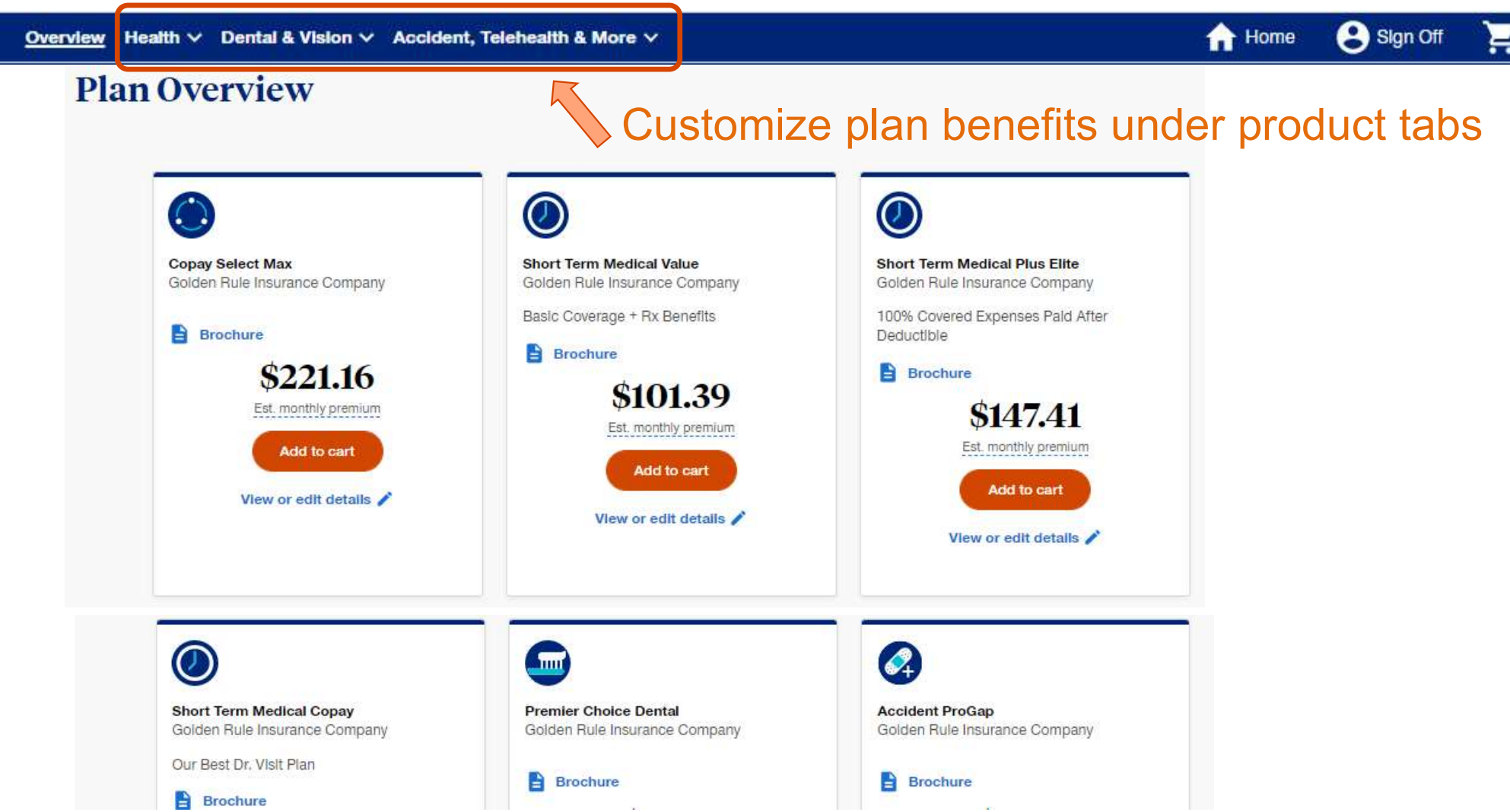
Quote & Enroll – Plan Selection



Quote & Enroll – Plan Selection



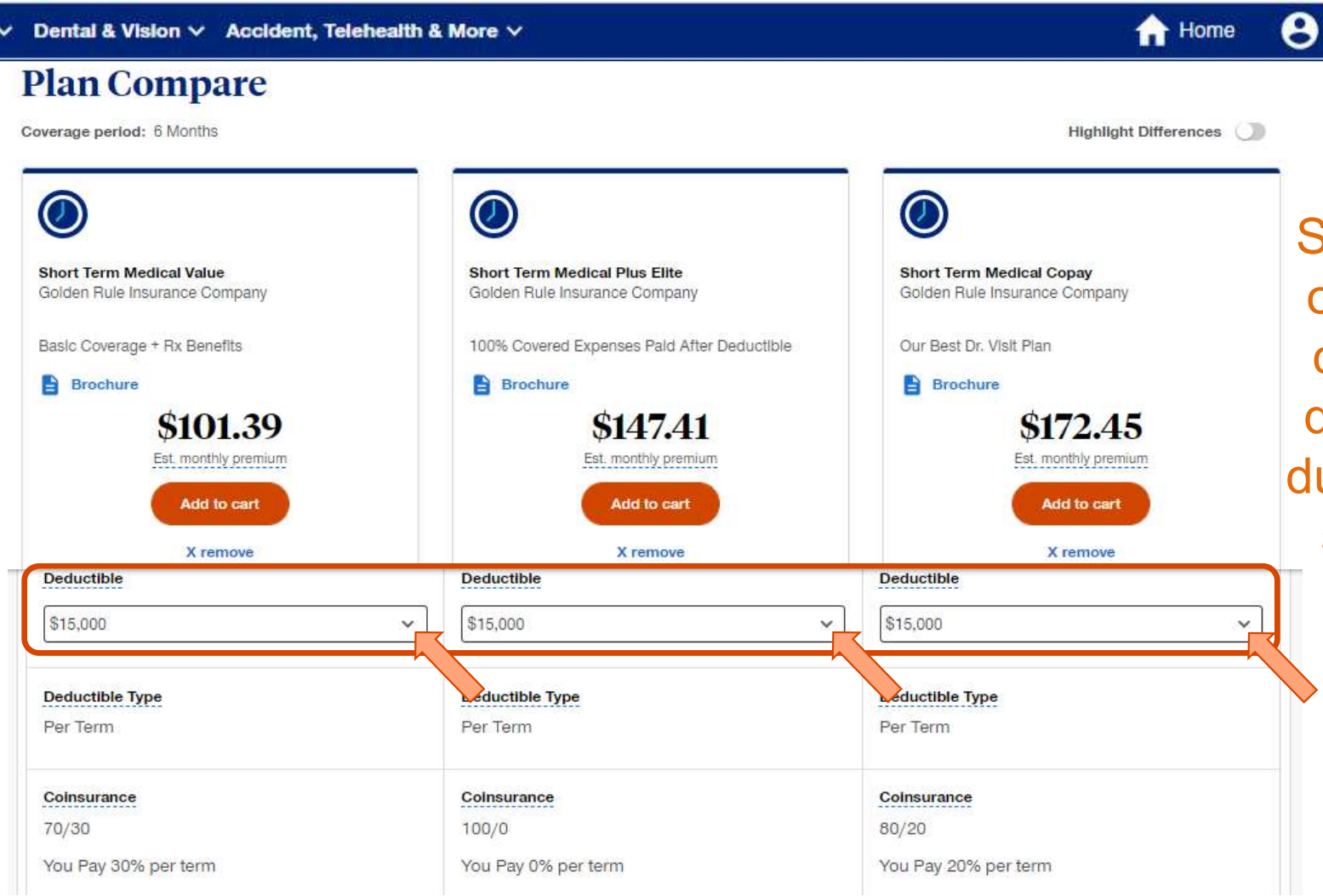
Quote & Enroll – Quote Overview



Quote & Enroll – Quote Customization



Quote & Enroll – Quote Customization / Short Term Example



Scroll down on page to customize deductible, duration and start date

Application Submission Options

1. **Send the Quote/Cart to Prospect**
   - Client adds product to cart and does application

2. **Broker Assisted Application: Send to Prospect (Email or Text)**
   - Broker fills cart and can start application before sending to client for their own signature

3. **Broker Assisted Application: Broker Submits Application via Security Question pathway *(New March 24, 2023)***
   - Broker completes entire application for client

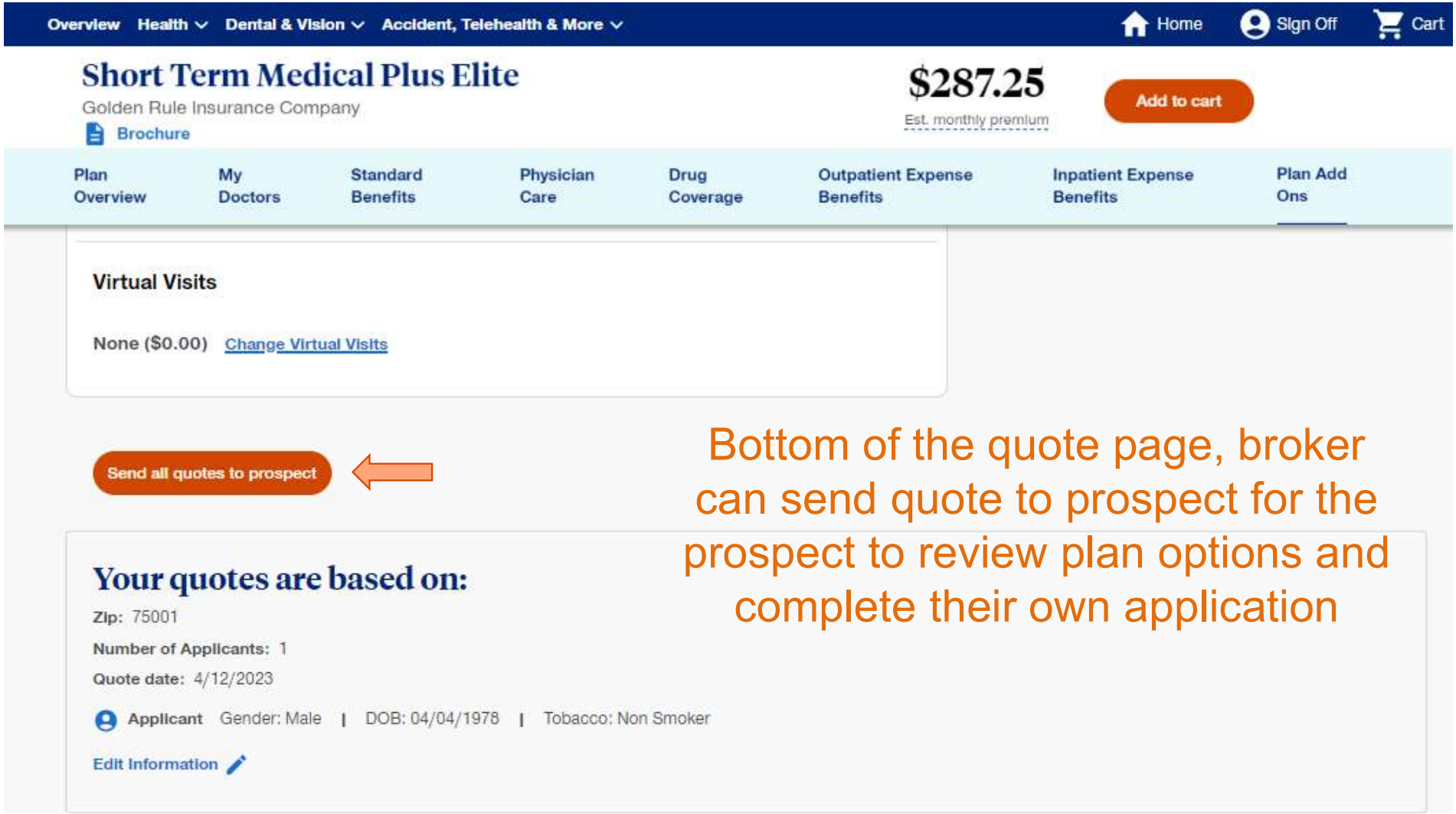
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Send the Quote/Cart to Prospect



Bottom of the quote page, broker can send quote to prospect for the prospect to review plan options and complete their own application

Send the Quote/Cart to Prospect

Client Opens Quote Email via Multi-Factor Authentication

When you send a broker-assisted application or application signature link, your clients will be asked to verify their identity.

- Enter a valid phone number belonging to your client when entering their application information. This the number that will be used for the validation process.
- Send your clients the link to their application for completion or signature.
- When your client clicks/taps the link in their email or text, they will receive the prompt for verification.
- Your client will select how they want to receive their unique verification code – by text or phone call.

Upon receiving the code, they will enter it into the prompt and then be taken to their application.



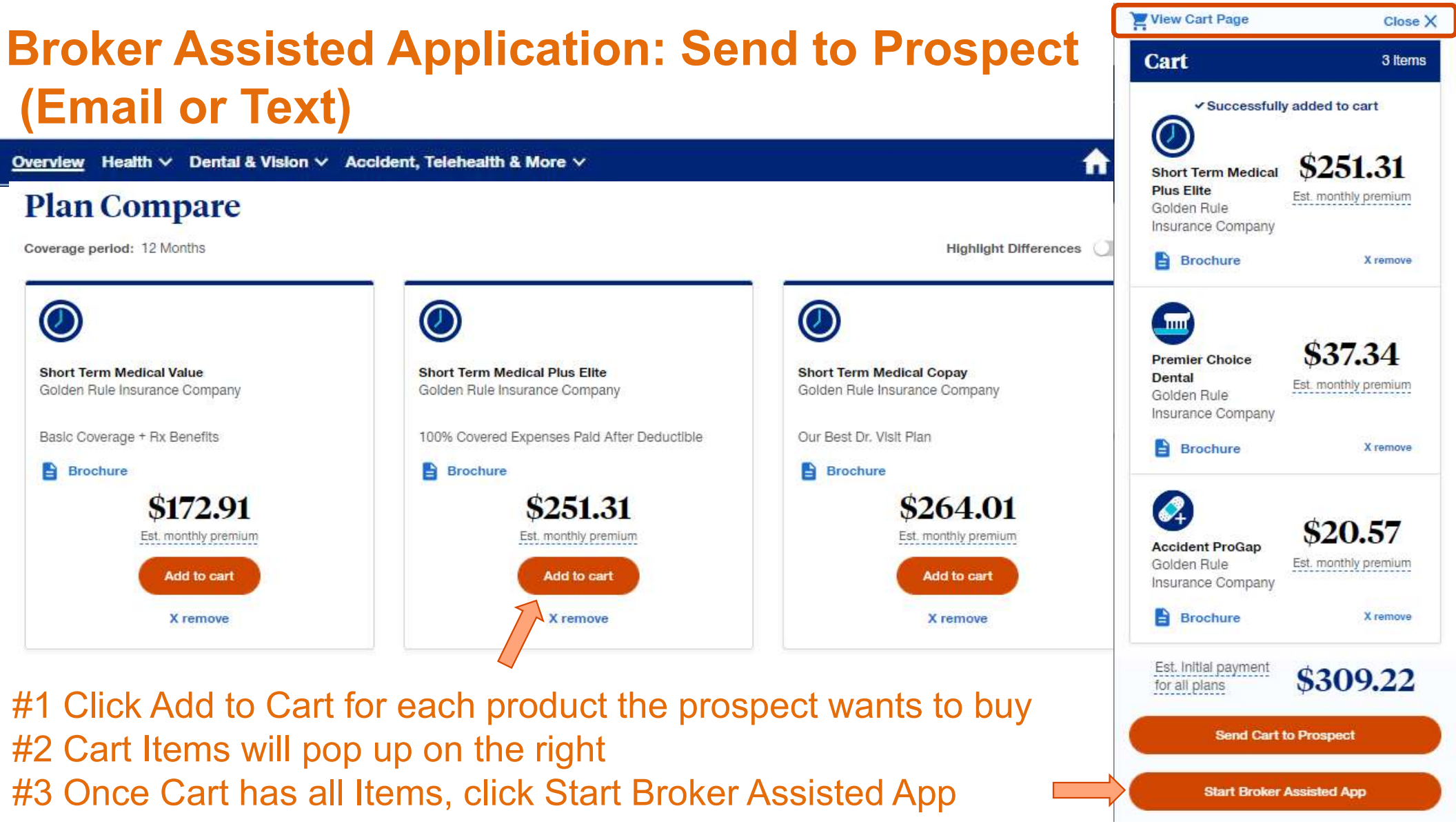
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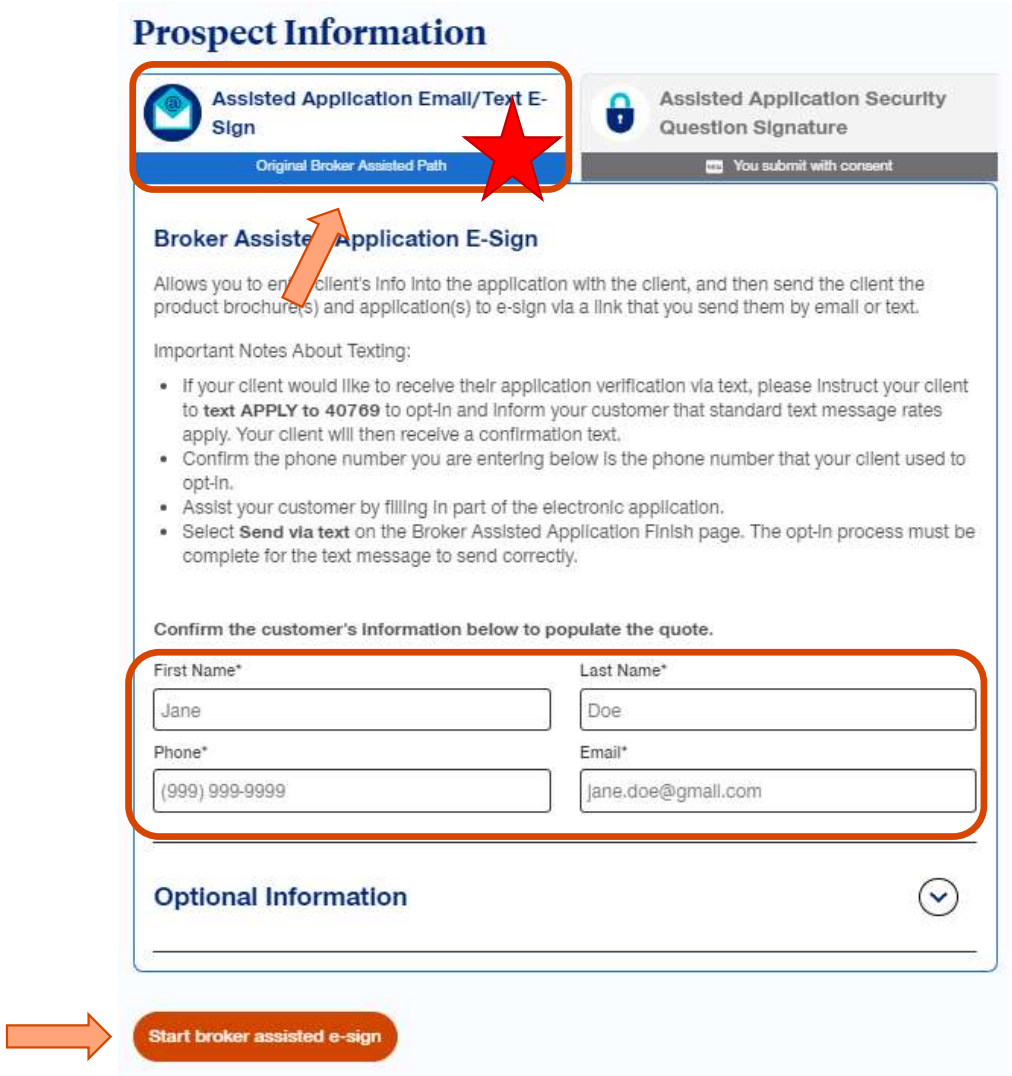
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Broker Assisted Application: Send to Prospect (Email or Text)

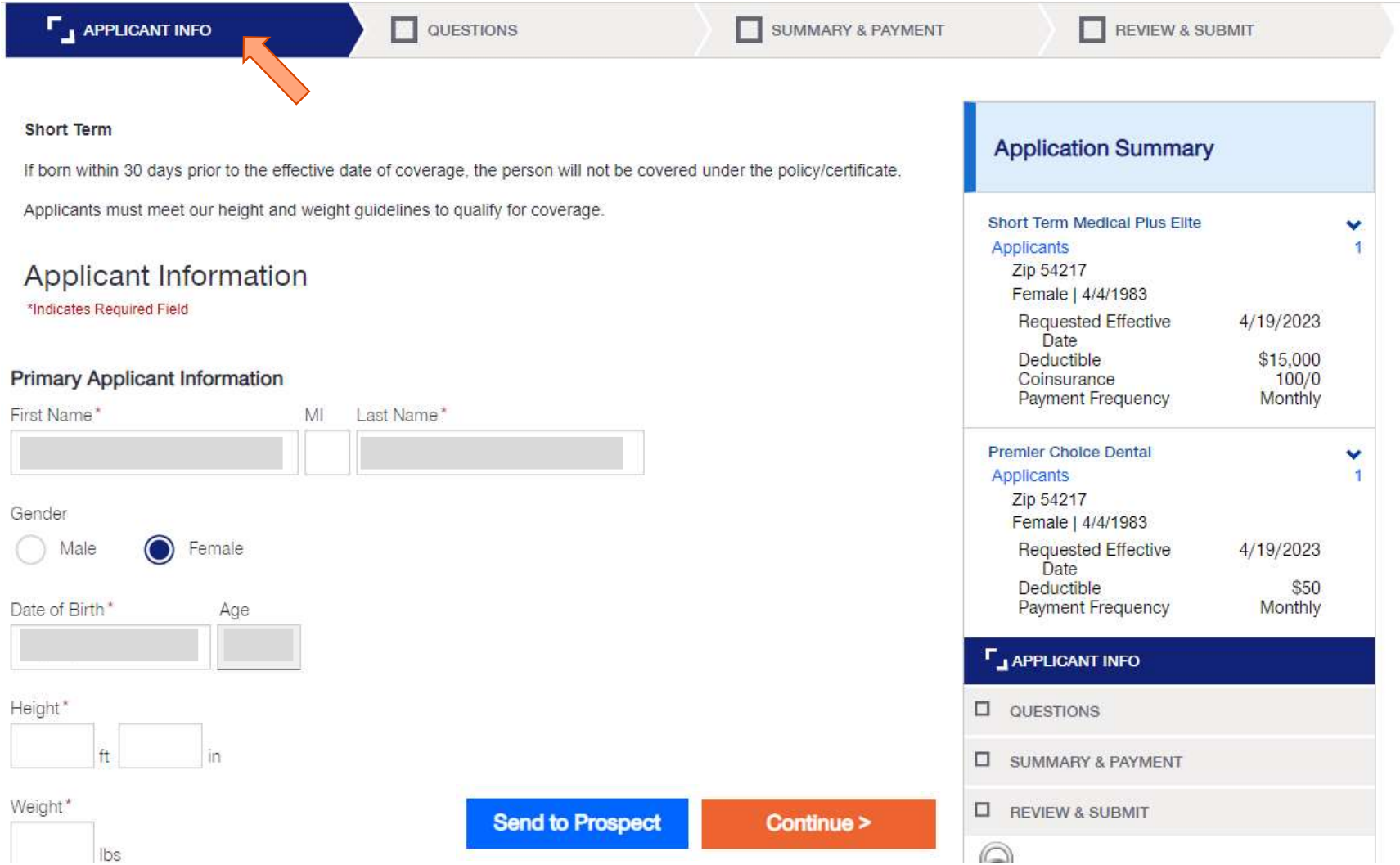


#1 Click Add to Cart for each product the prospect wants to buy
#2 Cart Items will pop up on the right
#3 Once Cart has all Items, click Start Broker Assisted App

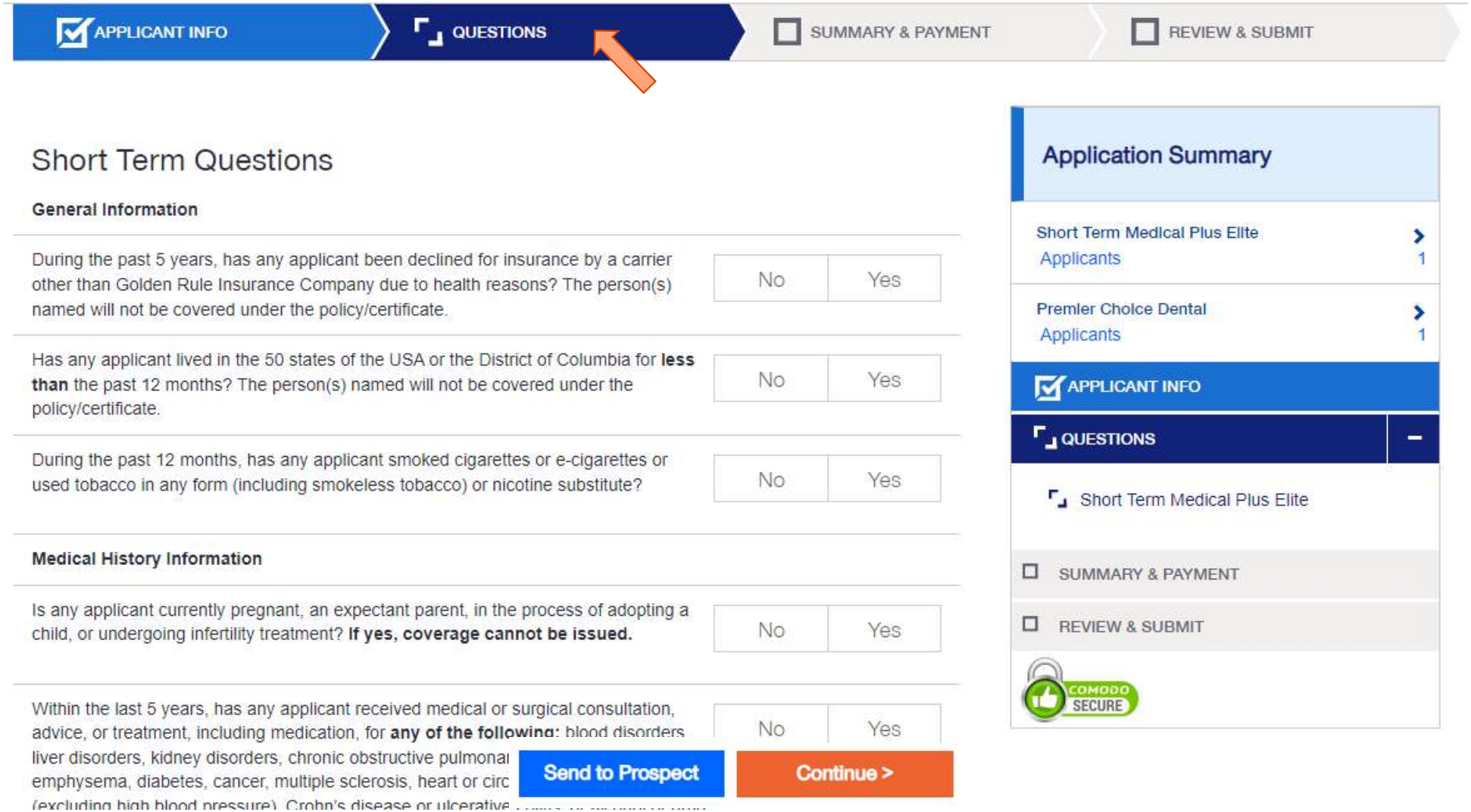
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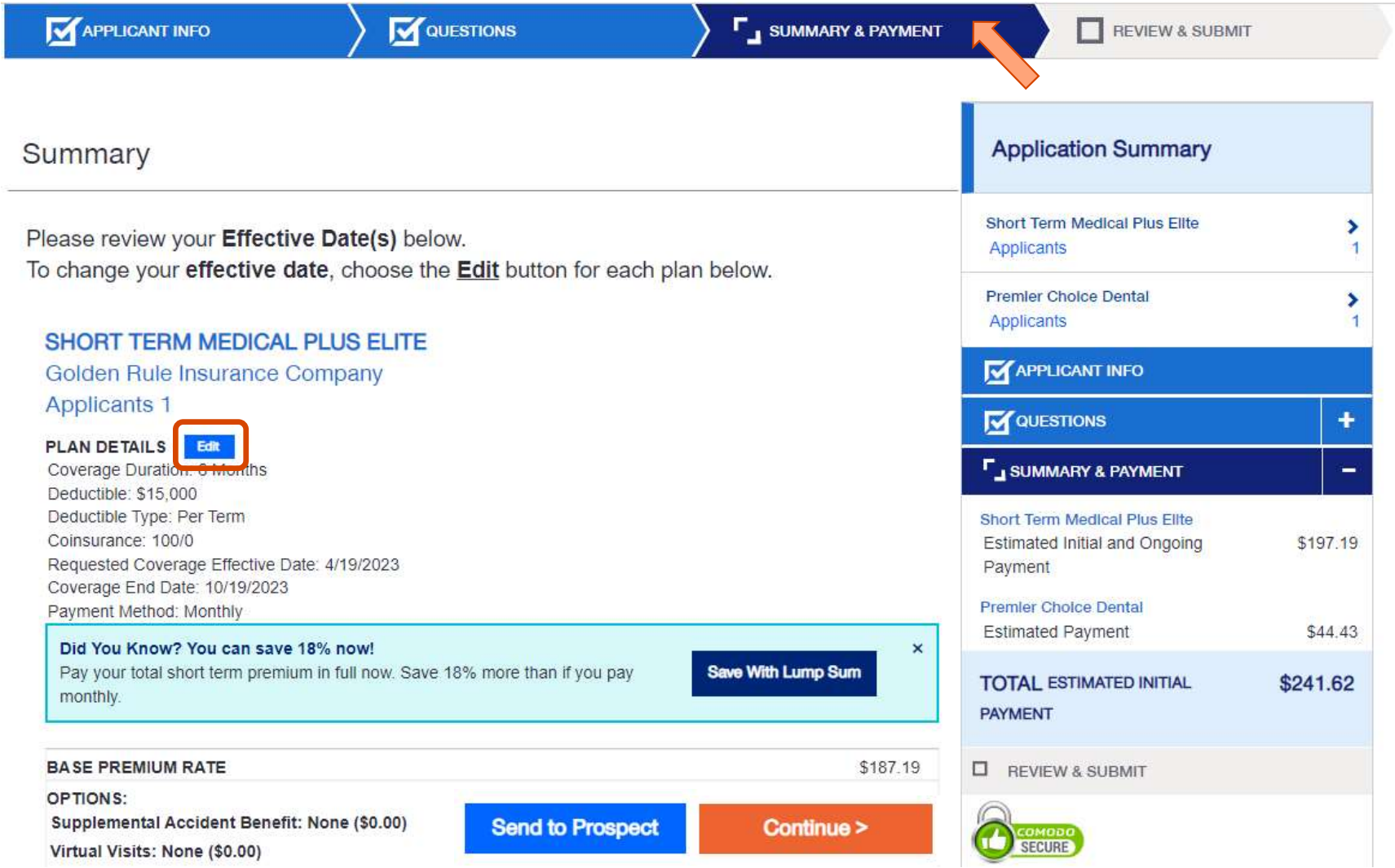
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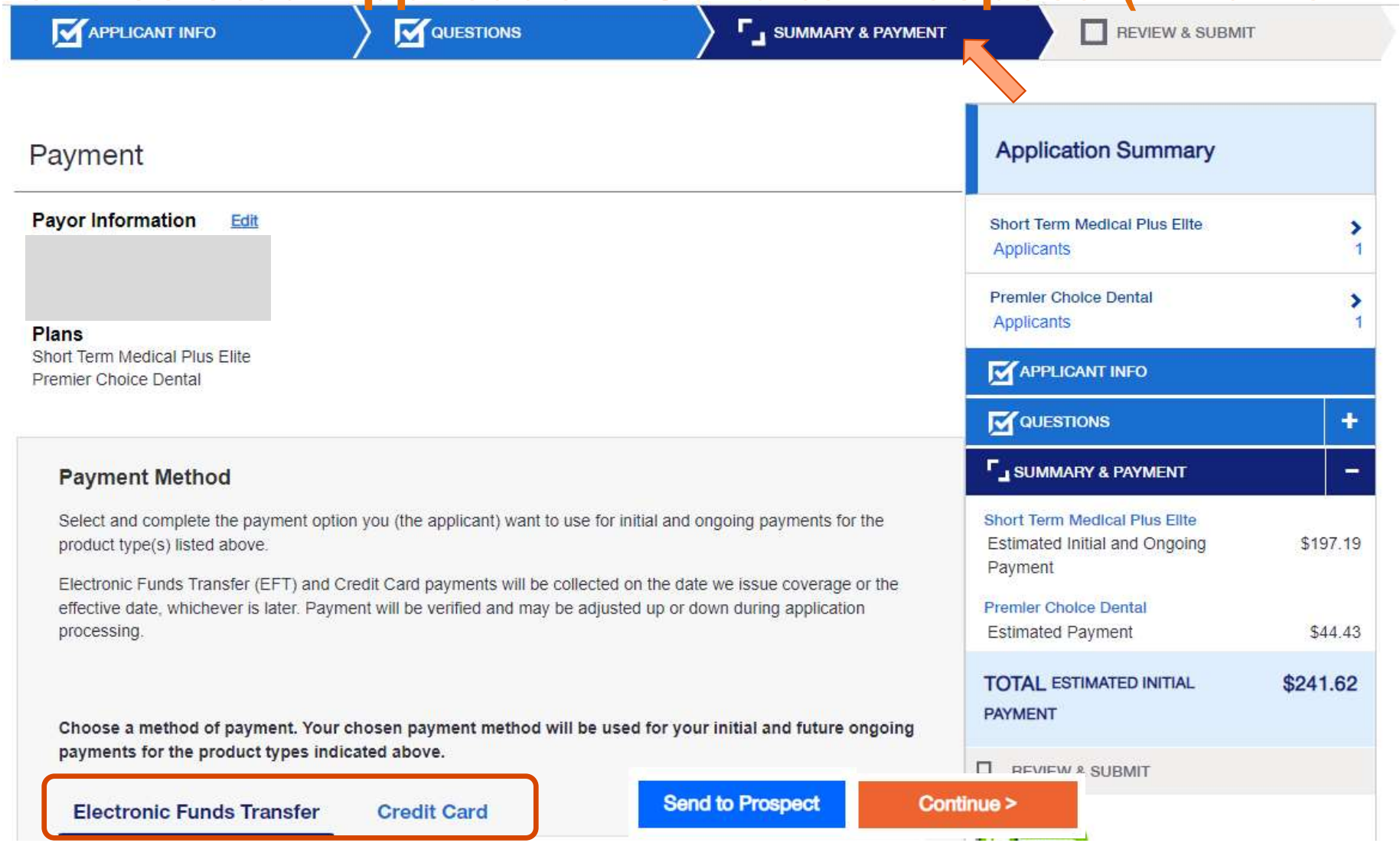
Broker Assisted Application: Send to Prospect (Email or Text)



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Broker Assisted Application: Send to Prospect (Email or Text)

Broker Assisted Application Finish

You will need to select one of the Send buttons at the bottom of this page to give control of this application to your prospect.

Before selecting **Send via Text**

- You certify that you offered your client the choice of email or text and received verbal approval from your client to receive their application via text and they have been notified that standard text messages apply.
- Your client must opt-in by texting the word **APPLY** to **40769** and receive a confirmation text message back before you can Send via Text.
- Confirm the phone number entered below is the phone number that your client used to opt-in.

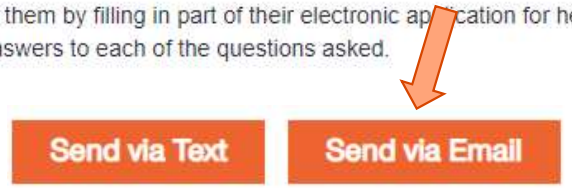
WARNING!

Insurance applications must be personally signed by the applicant, either electronically or by hand. Signature(s) by anyone else constitutes fraud against the company, for which we hold you responsible. Should this occur:

1. Your Independent Broker's Contract will be immediately terminated "for cause";
2. You will forfeit all future compensation; and,
3. You may be subject to criminal or civil prosecution.

Electronic Submission is the fastest, most convenient way for your client to apply. You can send your client a link to their application, which they will review and electronically sign. By clicking the Send to Prospect button you certify that:

1. Your client specifically requested that you assist them by filling in part of their electronic application for health insurance.
2. You accurately and completely recorded their answers to each of the questions asked.



Broker Assisted Application: Send to Prospect (Email)

Your Application - sent on behalf of *Broker Name Here*

U

UnitedHealthOne <no-reply@email.uhone.com>
To *Client Name / Email Here*
Retention Policy UHGInbox (90 days)

Dear *Client Name Here*

Here is the information you requested. To assist you, I have started the application process for you.

In order to view your quote and application, please click here, and provide your unique id 11831213.

To submit your application please:

1. Verify the answers on your application are correct.
2. Provide any missing information.
3. Electronically sign and submit your application.

Please proceed by clicking the link above to view your application and contact me if you have any questions.

Sincerely,

Broker Name & Contact Information Here

Broker Assisted Application: Send to Prospect (Email)

Client Opens Broker Assisted Application via Multi-Factor Authentication

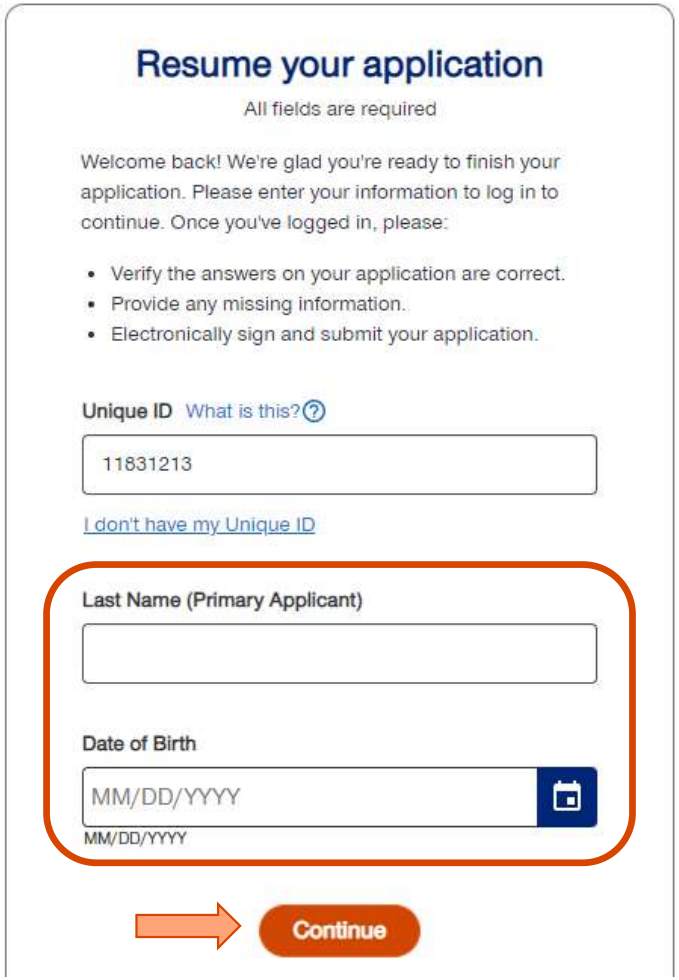
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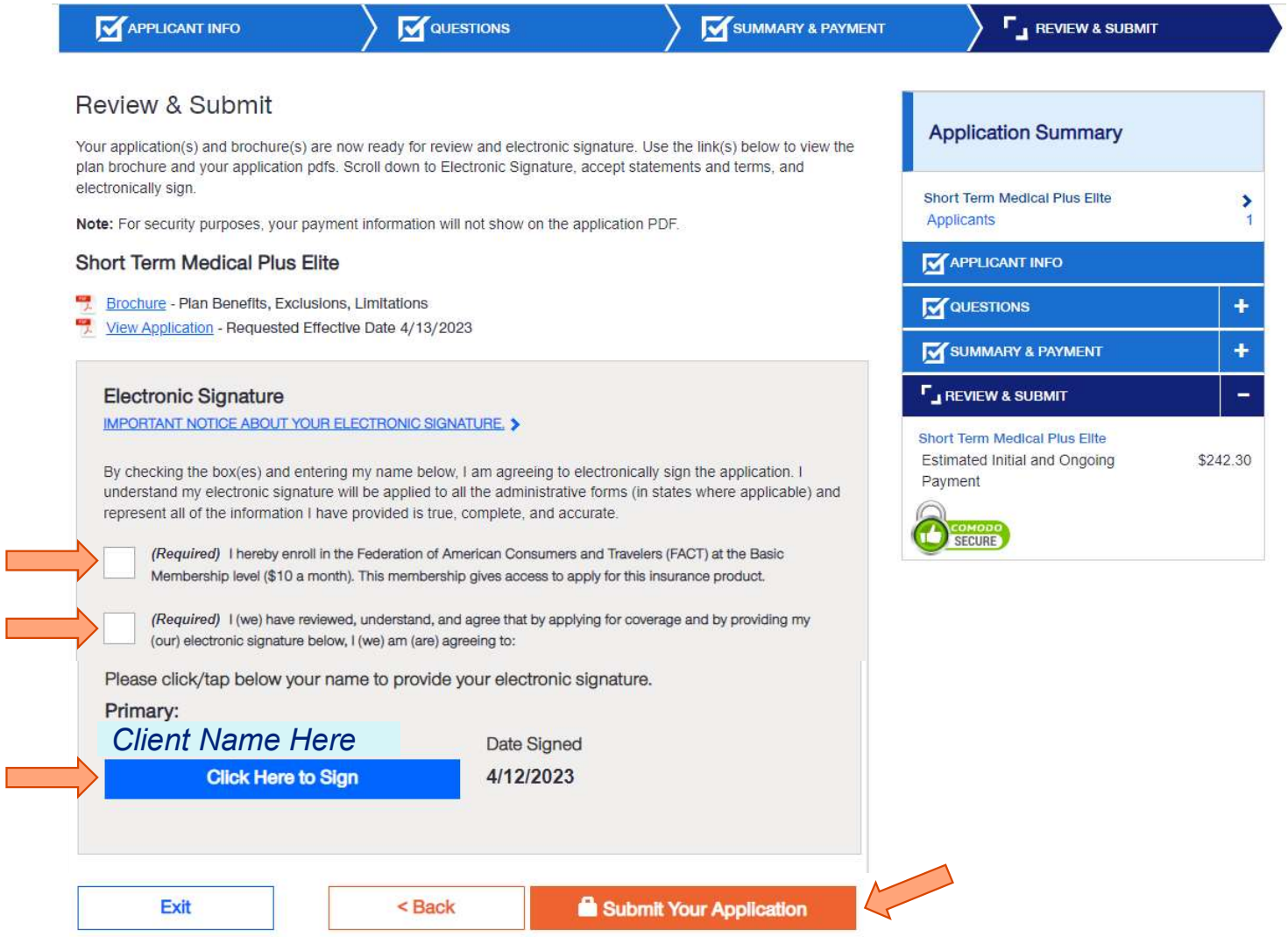
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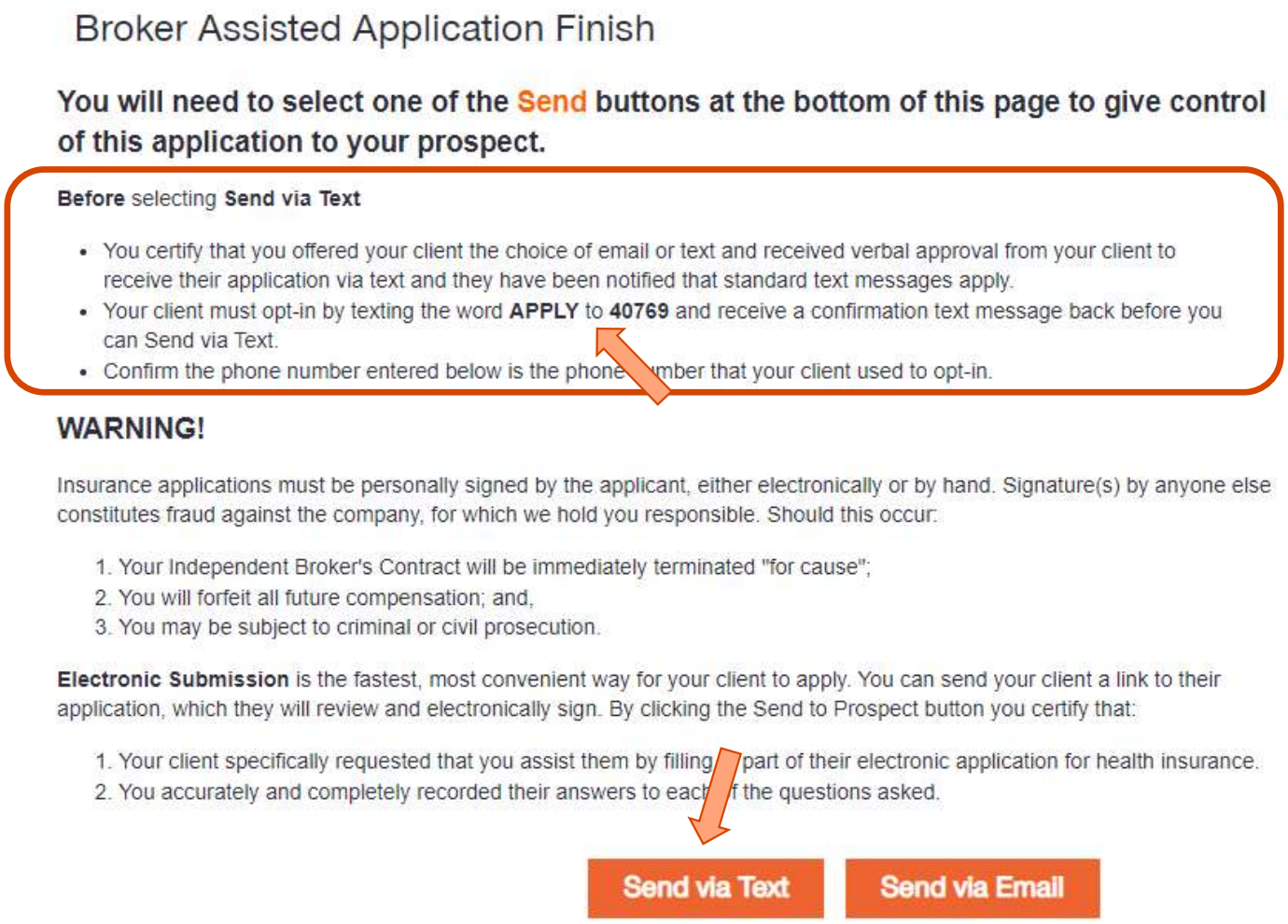
Broker Assisted Application: Send to Prospect (Email)



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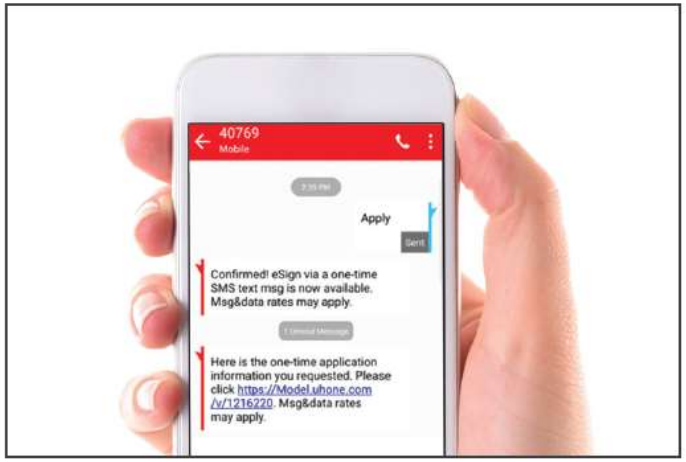
Broker Assisted Application: Send to Prospect (Text)



Broker Assisted Application: Send to Prospect (Text)

CLIENT PROCESS:





1. Client must text APPLY to 40769 for opt-in. Client will then receive a confirmation message. No reply is required.
2. Client receives application URL via text, verifies all questions are answered correctly, and enters missing information including credit card details (if needed).
3. Client reads and agrees to all disclaimers, E-Signs, and selects **Submit Your Application**
4. Client reaches the "Thank You" page to receive a plan number and a completed PDF for each product application.
5. Client receives an email from UnitedHealthOne to let them know the application has been received.

Broker Assisted Application: Send to Prospect (Text)

Client Opens Broker Assisted Application via Multi-Factor Authentication

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Application Submission Options

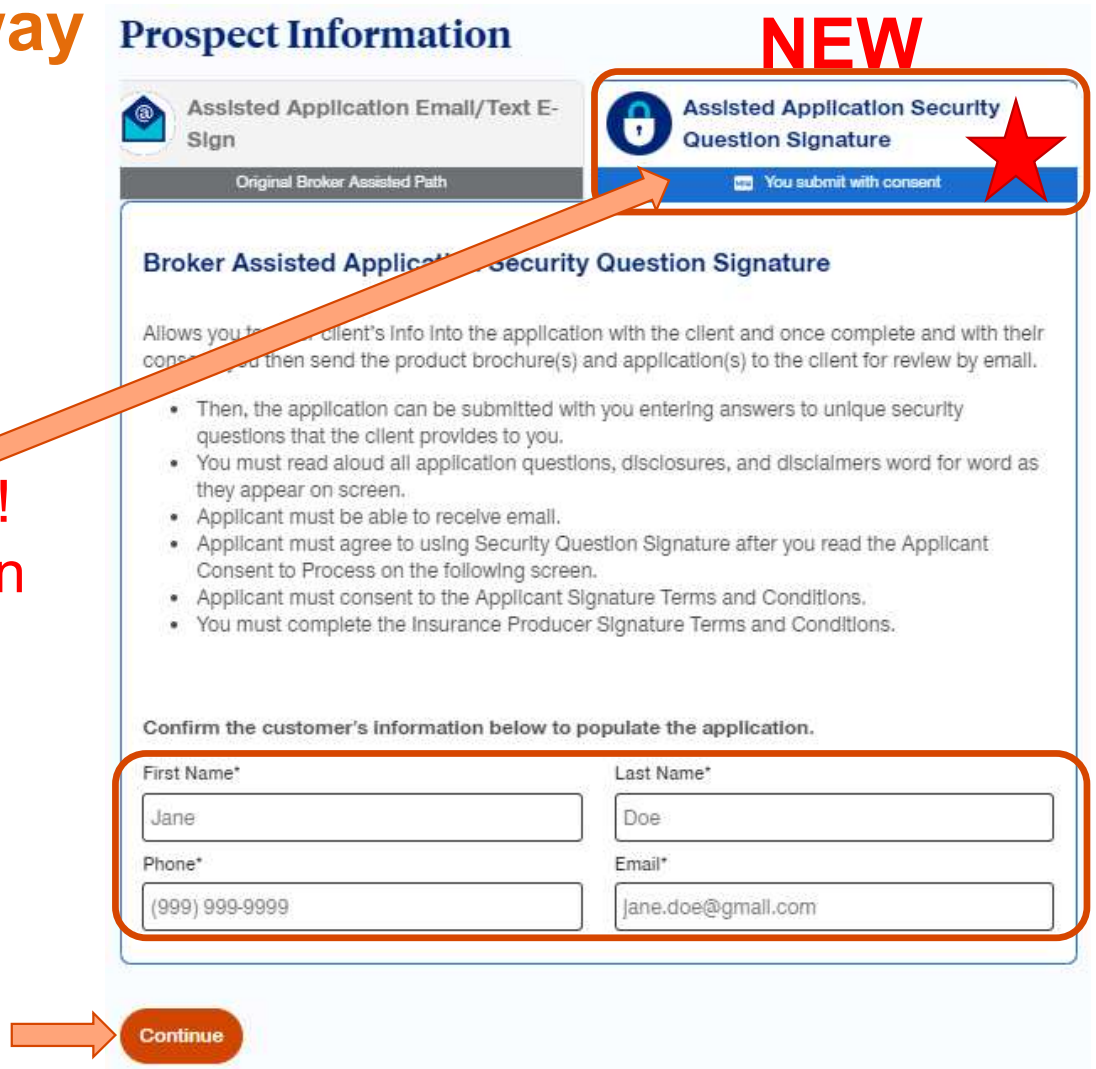
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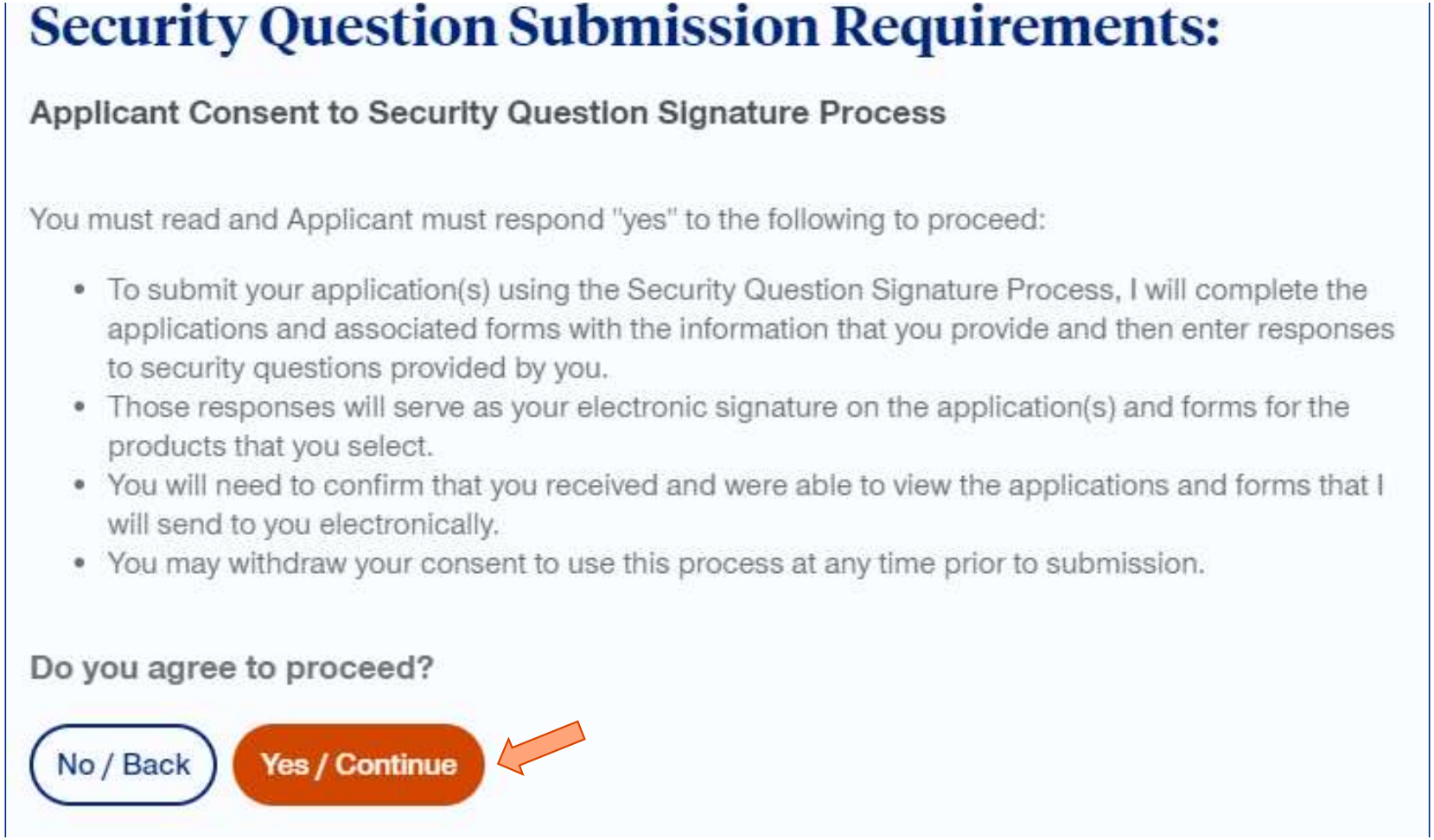
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Broker Assisted Application: Broker Submits Application via Security Question pathway

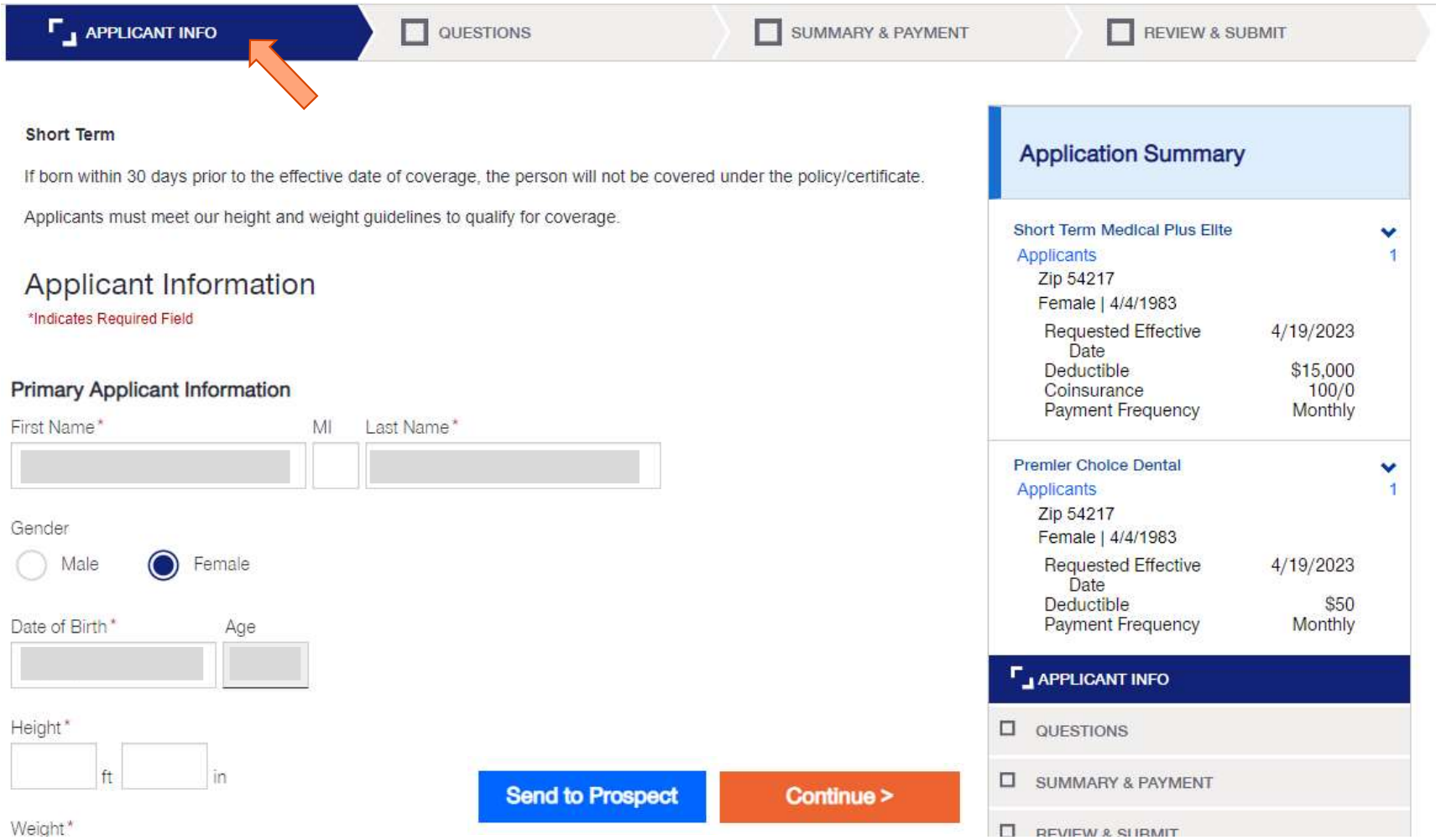
Pay attention on this page!
You must choose the option to the right.



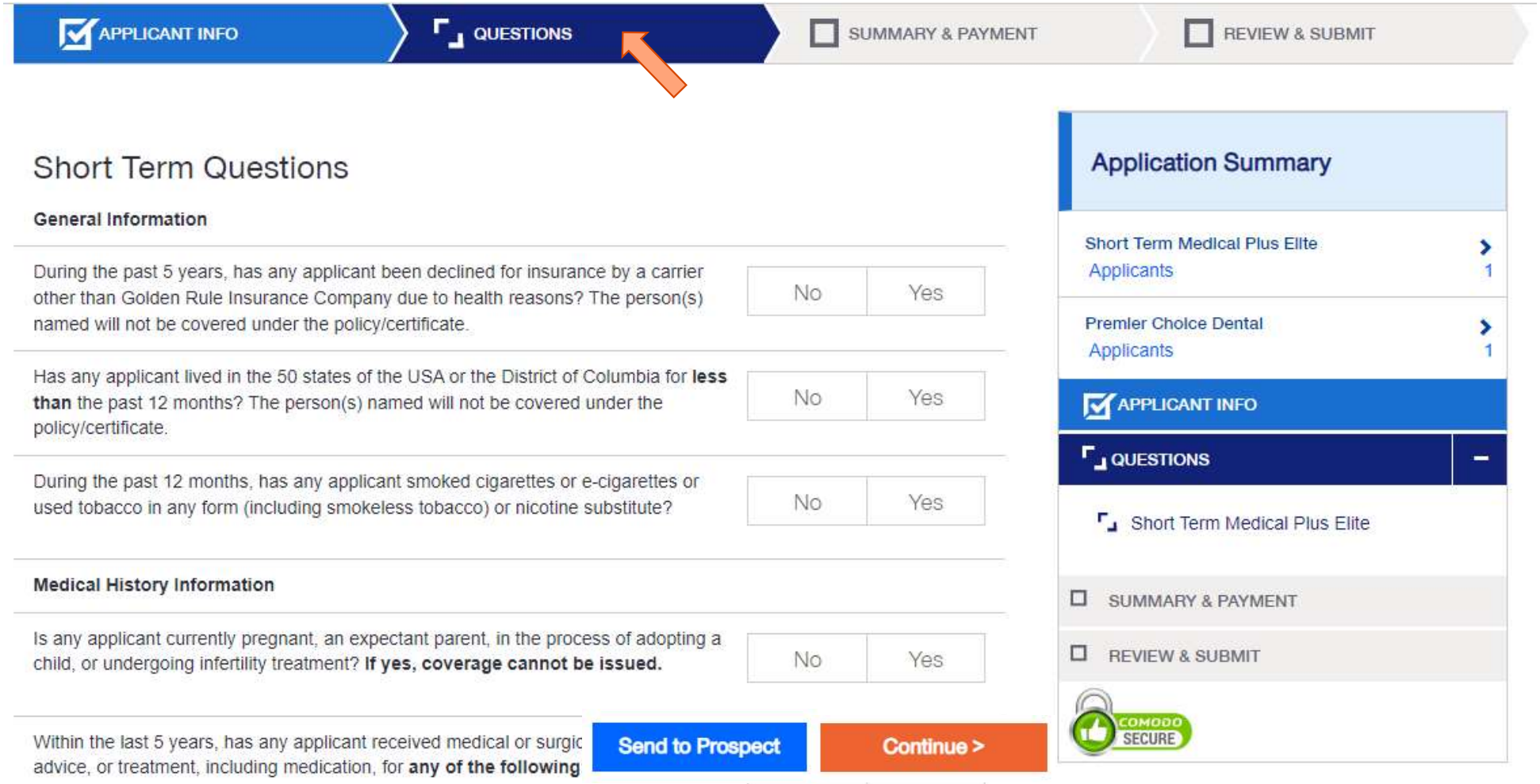
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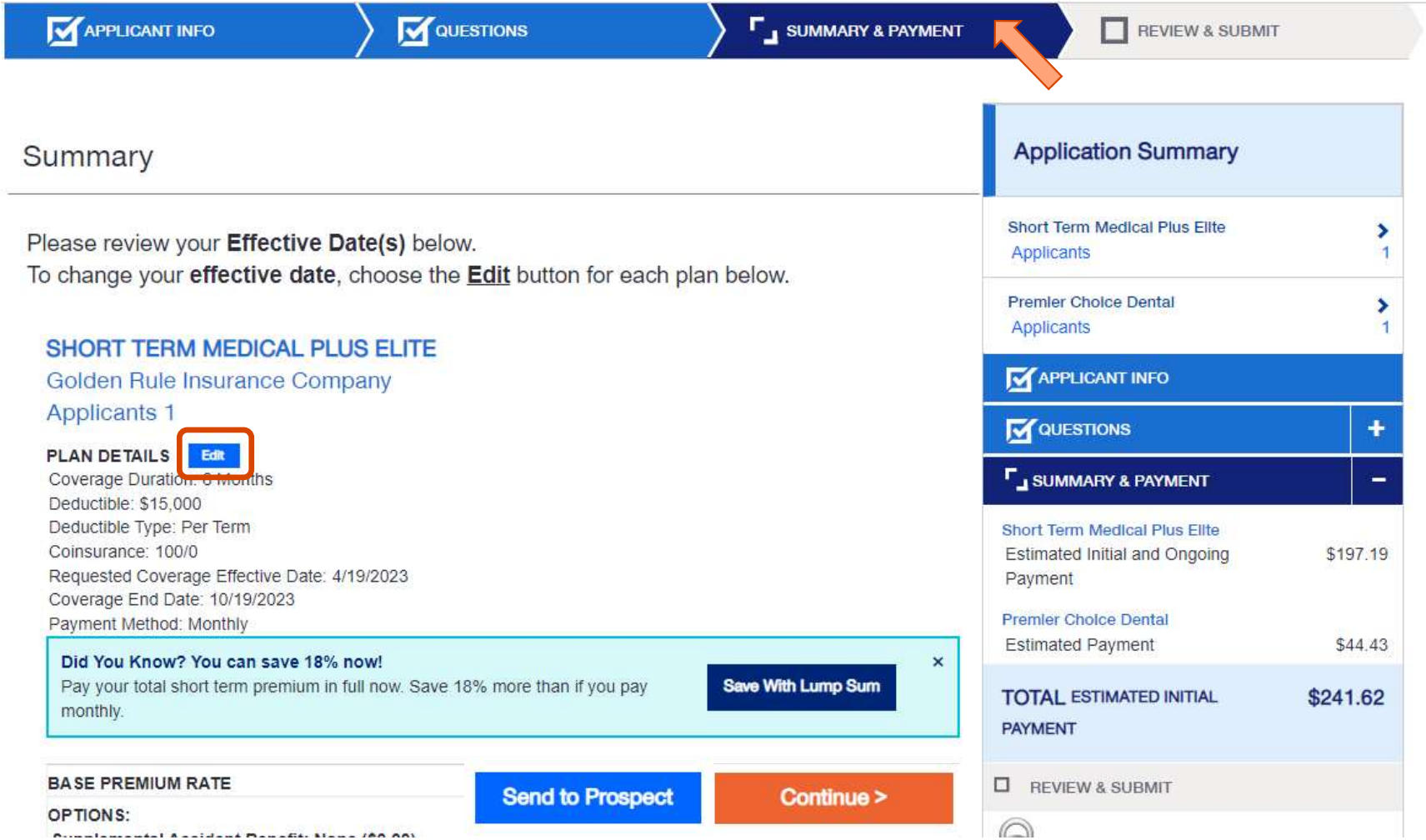
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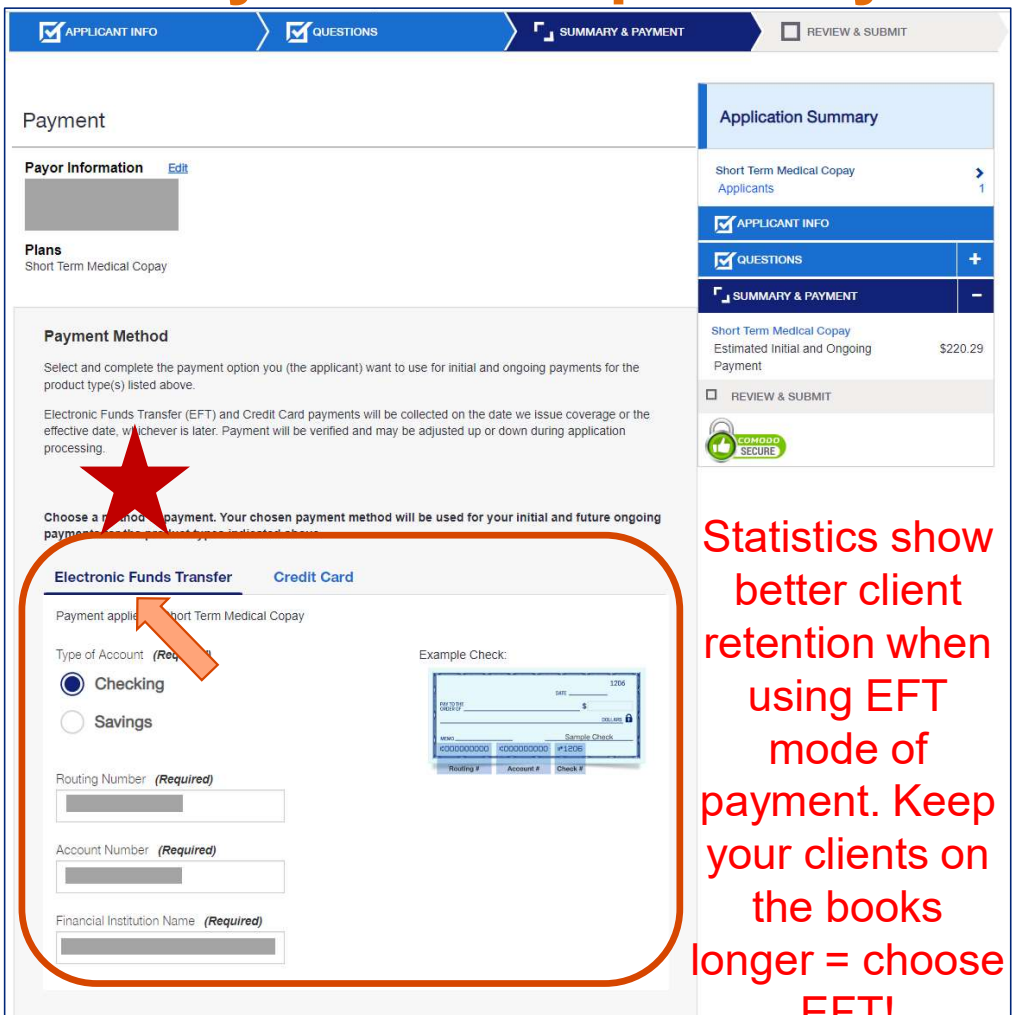
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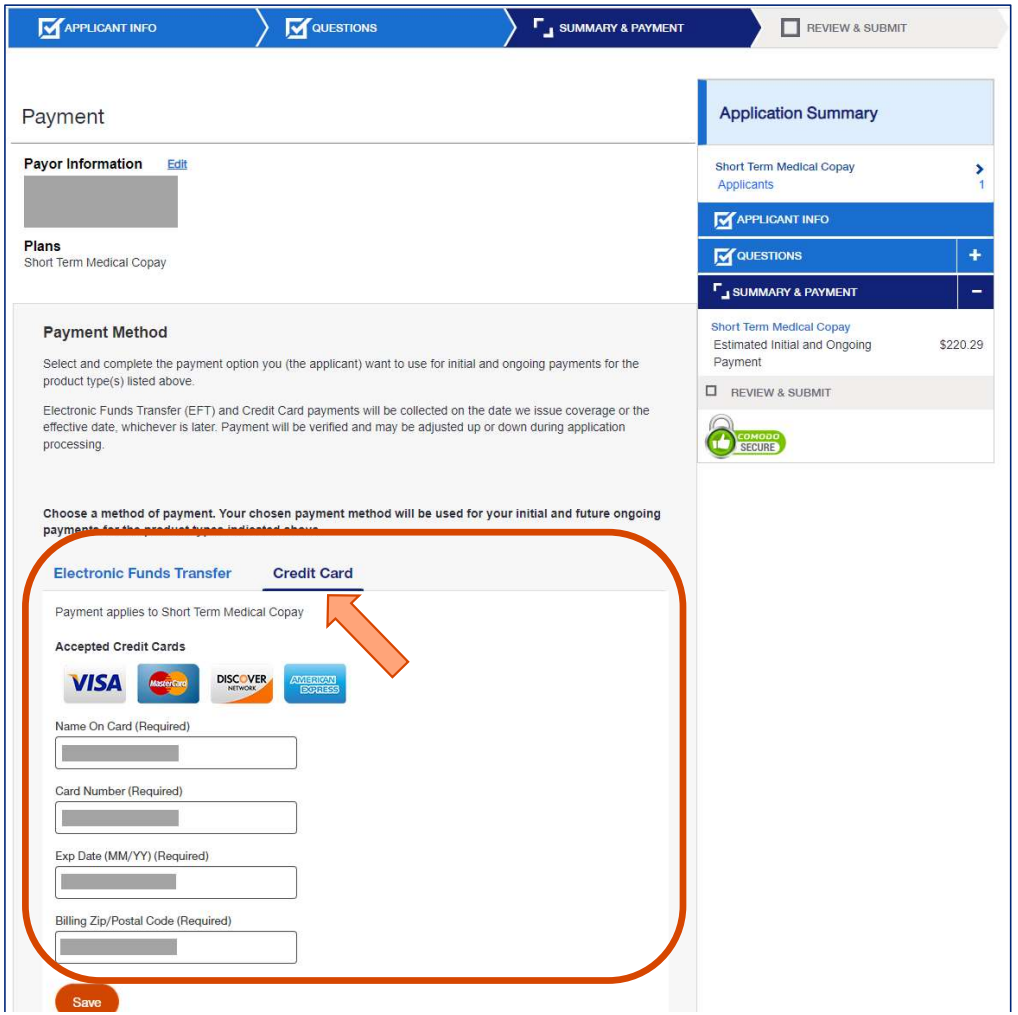
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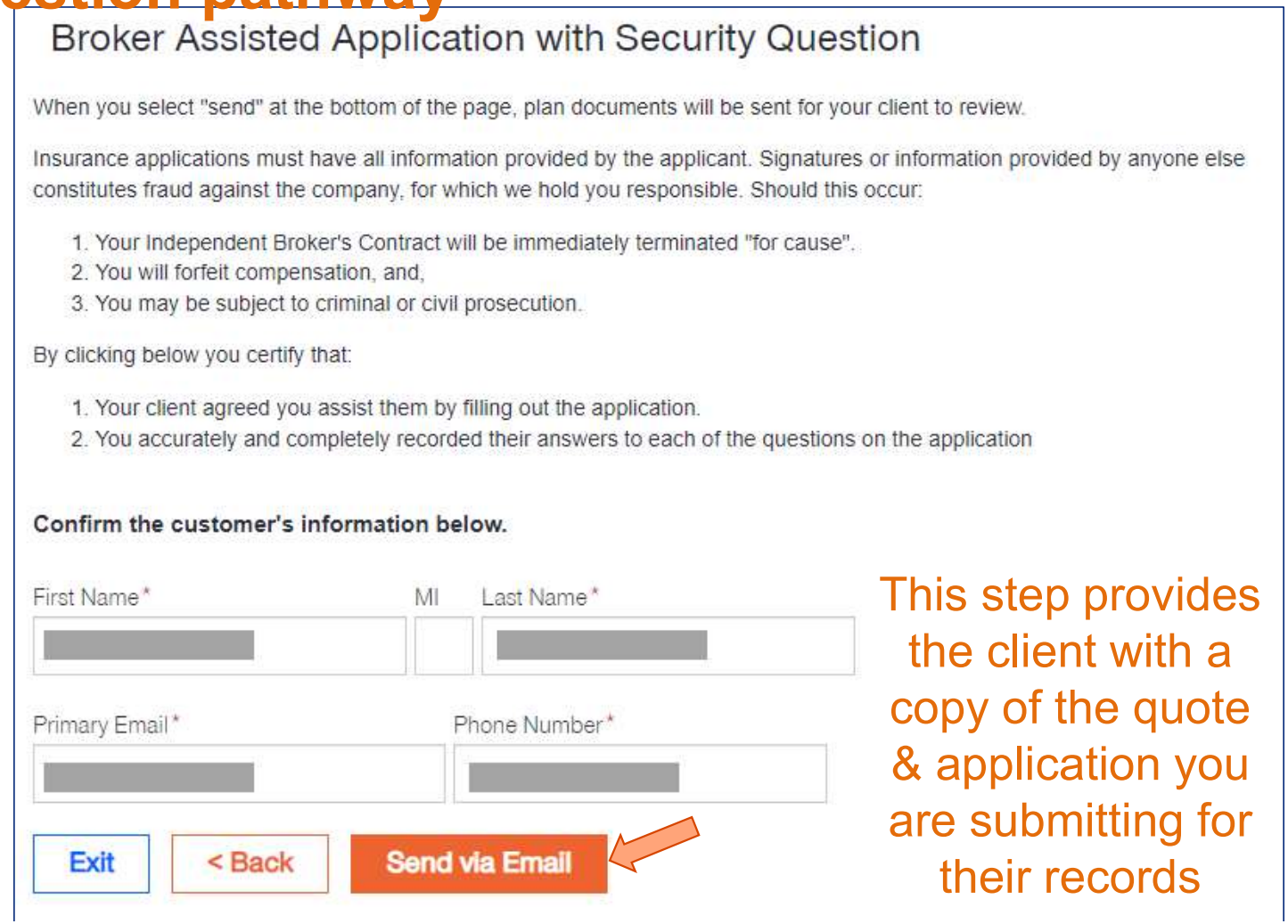
Broker Assisted Application: Broker Submits Application via Security Question pathway



Statistics show better client retention when using EFT mode of payment. Keep your clients on the books longer = choose EFT!



Broker Assisted Application: Broker Submits Application via Security Question pathway



This step provides the client with a copy of the quote & application you are submitting for their records

Broker Assisted Application: Broker Submits Application via Security Question pathway

Client Opens Email via Multi-Factor Authentication

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Broker Assisted Application: Broker Submits Application via Security Question pathway

Dear *Client Name Here*

Here is the information you requested.

In order to view your quote and application, please click here, and provide your unique id

Please proceed by clicking the link above to view your application and contact me if you have any questions.

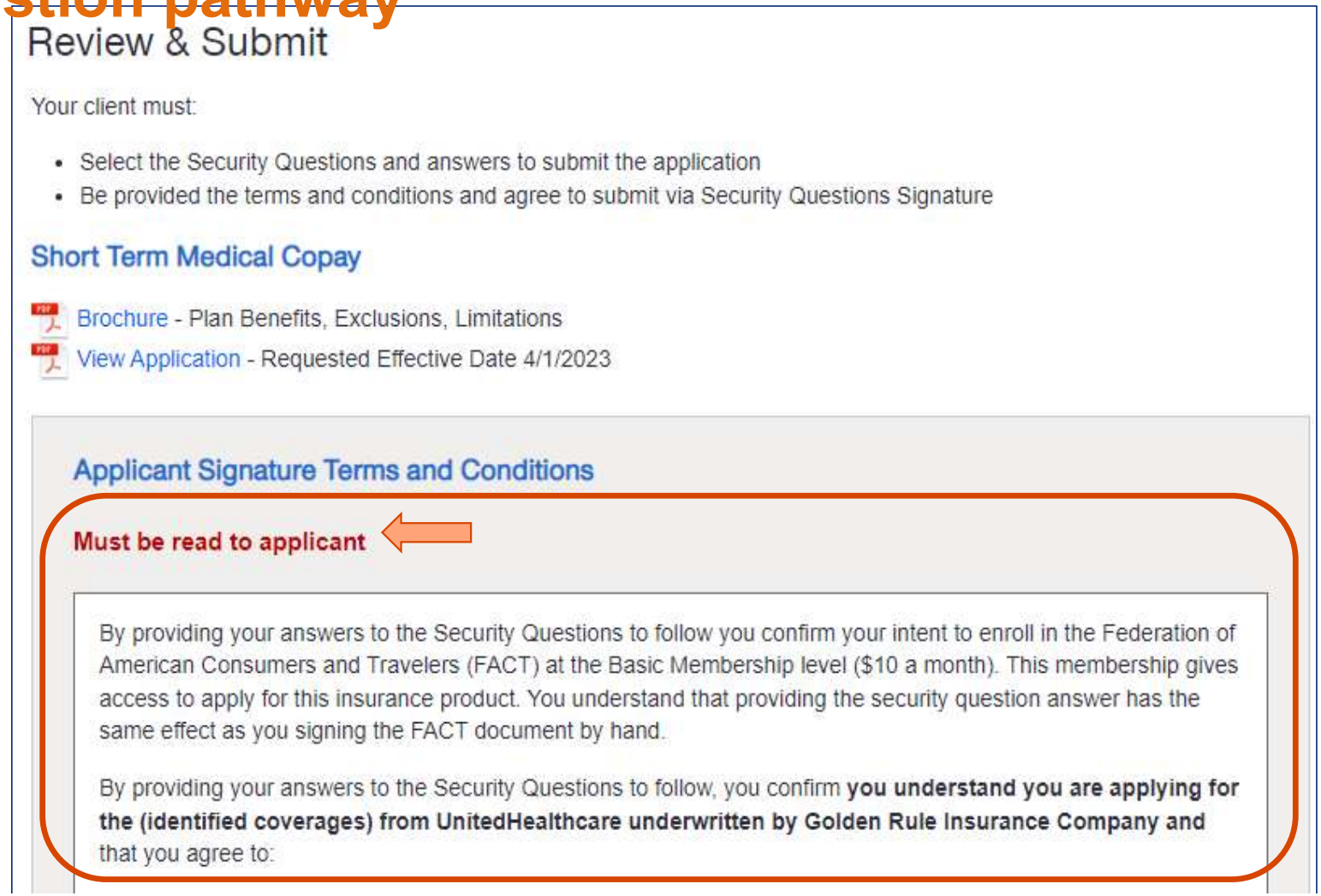
Sincerely,

Broker Name & Contact Information Here

41176-G-1218

Most products and services are underwritten by Golden Rule Insurance Company.
References to UnitedHealthcare pertain to each individual company or other UnitedHealthcare affiliated companies.
Administrative services are provided by United Healthcare Services, Inc.
UnitedHealthOne is a brand name that represents a portfolio of insurance options for individuals and families.
All products require separate applications. Separate policies or certificates are issued. Medical plans are medically underwritten– see the product brochures and applications.
Product availability varies by state.
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Broker Assisted Application: Broker Submits Application via Security Question pathway



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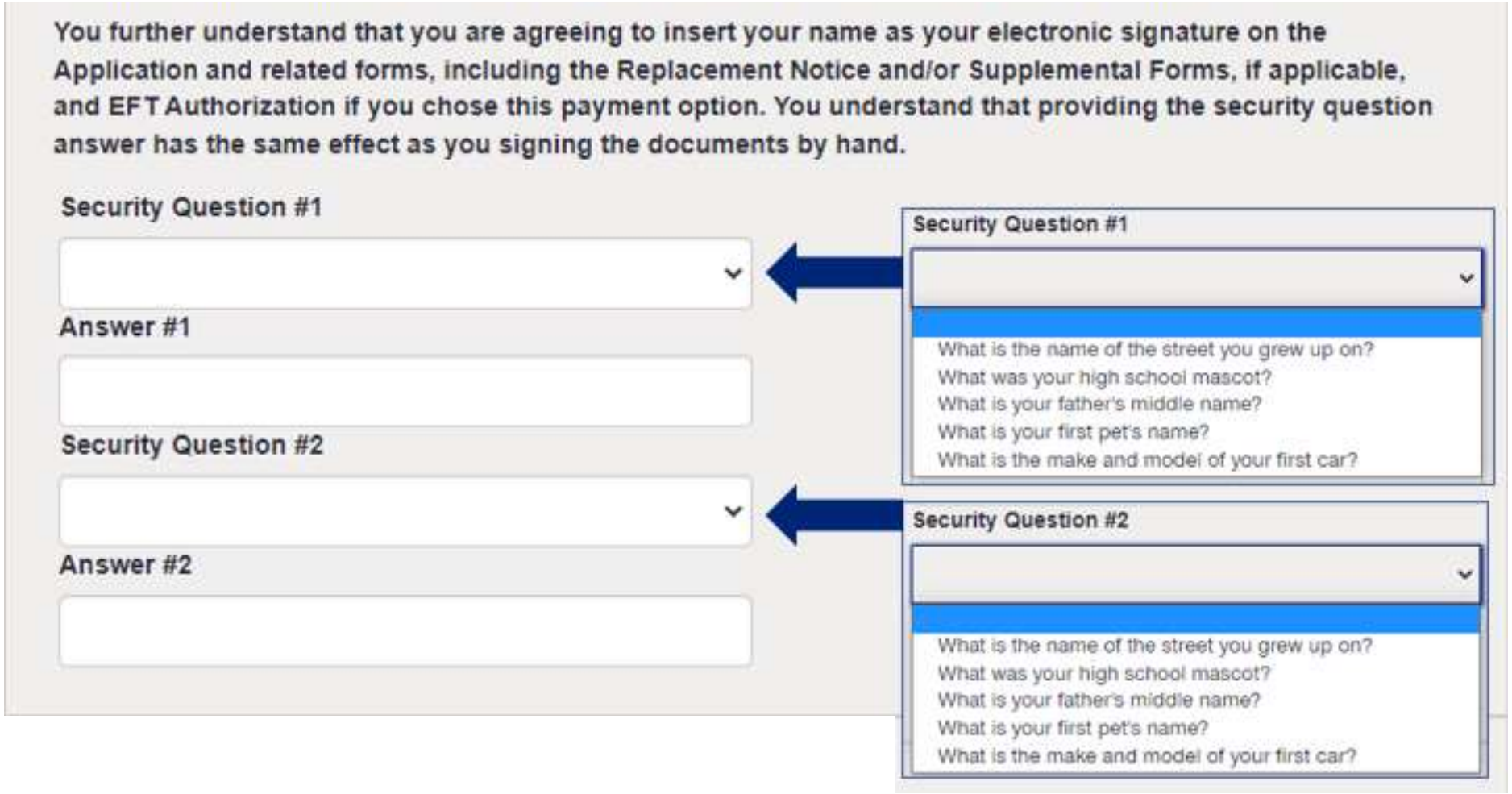
Must be read to applicant

- The terms and condition of your application and in the Statement of Understanding.
- The Consent to Receive Electronic Records and Conduct Transactions Electronically. You recognize that you are able to revoke this consent at any time by calling Customer Service directly, or by changing your preferences on the member portal.
- The Electronic Funds Transfer Authorization or Credit Card Authorization (based on method of payment).
- The Authorization to Obtain and Disclose Nonmedical information and Authorization to Obtain and Disclose Medical information (when applicable). The Notice to Application Regarding Replacement (when applicable).

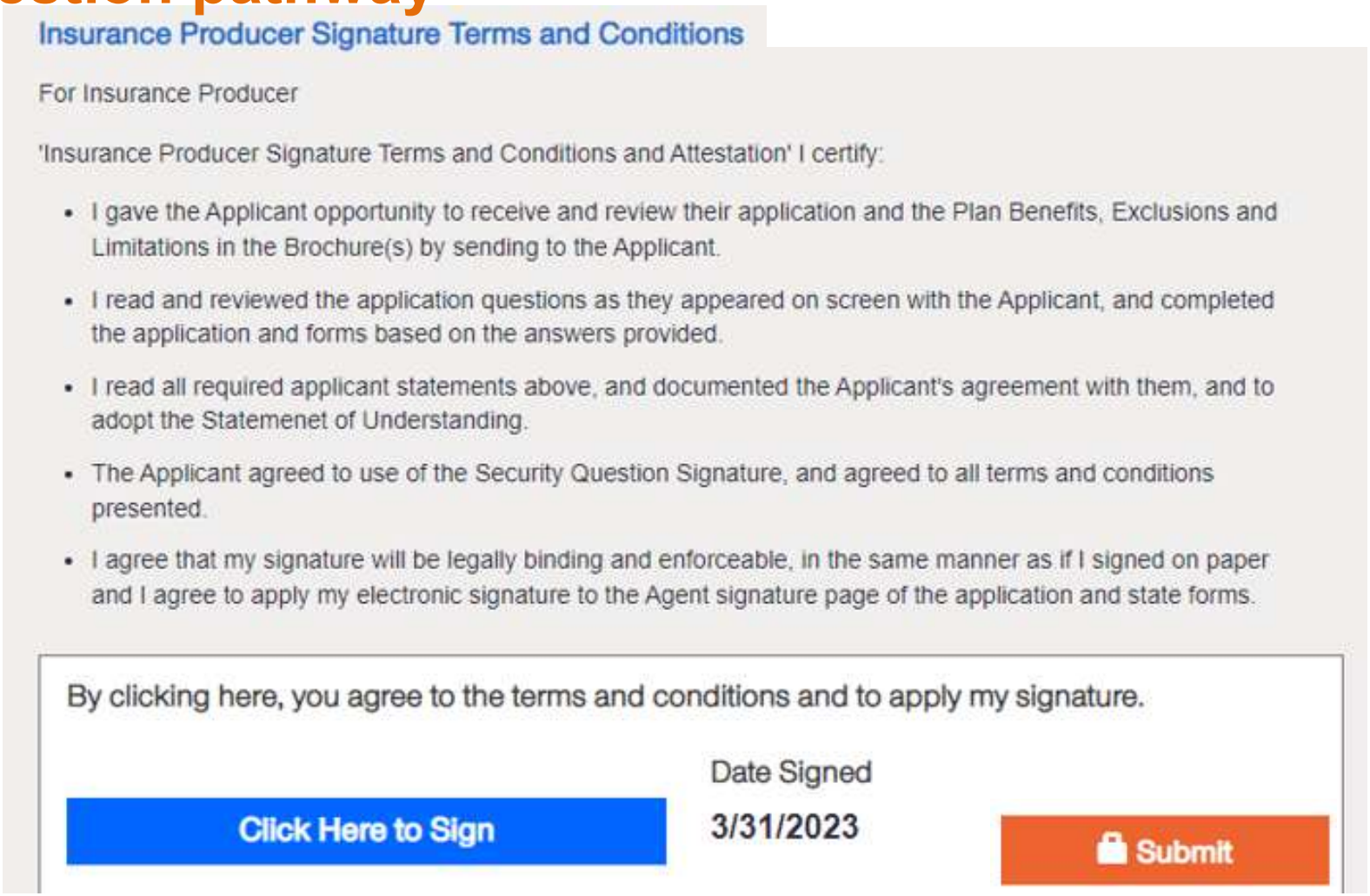
You further acknowledge that you have received and had the opportunity to review your completed application and understand the Plan Benefits, Exclusions and Limitations contained in the provided Brochure(s) and consent to receiving your records electronically.

You understand that by answering the security question, you are agreeing to all preceding disclosures and authorizations.

Broker Assisted Application: Broker Submits Application via Security Question pathway



Broker Assisted Application: Broker Submits Application via Security Question pathway



Thank You!



Bobbi Jo Massey
National Broker Account Executive
(920) 661-3003
bobbijo.massey@uhc.com

Broker Services: 800-474-4467

www.uhone.com/broker