



# Small Business Case Submission Checklist

## Case Submission Options

Format		Expected Turnaround
Self-service SAM (Sales Automation Management)	<a href="https://unitedservices.com">UnitedeServices.com</a>	<b>Same Day/24 Hours</b> (Click <a href="#">here</a> for SAM training info.)
CO Installation Department email	<a href="mailto:co_sb_new_groups@uhc.com">co_sb_new_groups@uhc.com</a> Be sure to include customer name in subject line.	<b>2–4 Business Days</b> 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

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







Contact your local UnitedHealthcare representative with any questions.

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MT-1175172.0 9/18 ©2018 United HealthCare Services, Inc. 18-8234

