

Slide 1 - Slide 1

Employer eServices®

Welcome to the Change Enrollment tutorial

Audience: Employers

Module Length: Approximately 7 minutes

Last Updated: 08/01/2007

1. Introduction 3. Change
2. Select 4. Try It!

Welcome to the Change Enrollment tutorial. In this tutorial, you'll learn how to change an enrollee's information using Employer eServices.

Text Captions

Welcome to the Change Enrollment tutorial. In this tutorial, you'll learn how to change an enrollee's information using Employer eServices.

Welcome to the Change Enrollment tutorial

Audience: Employers

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Last Updated: 08/01/2007

Slide 2 - Slide 2

The screenshot shows a presentation slide with a blue header bar containing the text 'Employer eServices®'. The main content area is white and contains the following text: 'Welcome to the Change Enrollment tutorial', 'Audience: Employers', 'Module Length: Approximately 7 minutes', and 'Last Updated: 08/01/2007'. At the bottom, there is a grey navigation bar with four buttons: '1. Introduction', '2. Select', '3. Change', and '4. Try It!'. To the right of the navigation bar is a blue-bordered box containing the text: 'As you proceed, you may use the controls at the bottom of this window to rewind, pause, or skip ahead during playback.'

Text Captions

As you proceed, you may use the controls at the bottom of this window to rewind, pause, or skip ahead during playback.

Welcome to the Change Enrollment tutorial

Audience: Employers

Module Length: Approximately 7 minutes

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Slide 3 - Slide 3

The screenshot shows a presentation slide with a blue header bar containing the text 'Employer eServices®'. The main content area is white and contains the following text: 'Welcome to the Change Enrollment tutorial', 'Audience: Employers', 'Module Length: Approximately 7 minutes', and 'Last Updated: 08/01/2007'. At the bottom, there is a grey navigation bar with four buttons: '1. Introduction', '2. Select', '3. Change', and '4. Try It!'. To the right of the navigation bar is a blue-bordered box containing the text: 'To move from one section to another, click the menu buttons found above the playback controls.'

Text Captions

Welcome to the Change Enrollment tutorial

To move from one section to another, click the menu buttons found above the playback controls.

Audience: Employers

Module Length: Approximately 7 minutes

Last Updated: 08/01/2007

Slide 4 - Slide 4

Employer eServices®

Welcome to the Change Enrollment tutorial

Audience: Employers

Module Length: Approximately 7 minutes

Last Updated: 08/01/2007

1. Introduction 3. Change
2. Select 4. Try It!

Also, please note that your screens may be a bit different from the ones you'll see in this tutorial. The difference depends on your contractual agreement.

Text Captions

Also, please note that your screens may be a bit different from the ones you'll see in this tutorial. The difference depends on your contractual agreement.

Welcome to the Change Enrollment tutorial

Audience: Employers

Module Length: Approximately 7 minutes

Last Updated: 08/01/2007

Slide 5 - Slide 5

The screenshot shows a presentation slide with a blue header bar containing the 'Employer eServices®' logo. The main content area is white and features the title 'Welcome to the Change Enrollment tutorial' in bold. Below the title, there are three lines of text: 'Audience: Employers', 'Module Length: Approximately 7 minutes', and 'Last Updated: 08/01/2007'. At the bottom left, there is a grey navigation bar with four buttons: '1. Introduction', '2. Select', '3. Change', and '4. Try It!'. At the bottom right, there is a blue-bordered text box containing a disclaimer: 'Finally, remember that all sample information you'll see in this tutorial is fictitious. Any resemblance to existing individuals or companies is purely coincidental.'

Text Captions

Finally, remember that all sample information you'll see in this tutorial is fictitious. Any resemblance to existing individuals or companies is purely coincidental.

Welcome to the Change Enrollment tutorial

Audience: Employers

Module Length: Approximately 7 minutes

Last Updated: 08/01/2007

Slide 1 - Slide 1

Text Captions

The change process involves a series of pages on which you may update an enrollee's information.

Slide 2 - Slide 2

Text Captions

Keep in mind that an enrollee may be either an employee or an employee's dependent.

Slide 3 - Slide 3

The screenshot shows the Employer eServices website. At the top, there is a blue navigation bar with the logo 'Employer eServices®' on the left and 'Help Training Tutorials' on the right. A 'Log Out' button is also present. Below the navigation bar, a red box highlights the 'Highlight Box' menu item. A callout box with a blue border and white background points to this menu item, containing the text 'Select the Enrollment menu option'. The main content area features a 'Welcome User,' message, a paragraph about the service, and a 'Hot Topics!' section with several links. Below this are three columns of links under the headings 'Resources', 'Network Information', and 'Programs & Services'. At the bottom of the screenshot, there is a grey box containing four numbered buttons: '1. Introduction', '2. Select', '3. Change', and '4. Try It!'. To the right of this box is a white box with a blue border containing the text 'To begin, select the Enrollment menu option.'

Text Captions

To begin, select the Enrollment menu option.

Select the **Enrollment** menu option

Slide 4 - Slide 4

The screenshot shows the Employer eServices website interface. At the top, there is a navigation bar with links for [Enrollment](#), [ID Cards](#), and [Claims](#). On the right side of this bar are links for [Help](#), [Training](#), and [Tutorials](#). Below this is a secondary menu bar with options: [Add](#), [Terminate](#), [Reinstate](#), [Change](#) (highlighted with a red box), and [Inquire](#). A [Log Out](#) button is also present. The main content area starts with a "Welcome User," message and a callout box that says "Click the **Change** option". Below this is a "Hot Topics!" section with several news links. At the bottom, there are three columns of links under the headings "Resources", "Network Information", and "Programs & Services". A navigation bar at the bottom of the slide contains four buttons: "1. Introduction", "2. Select", "3. Change", and "4. Try It!". To the right of this bar, a text box states: "A second menu bar appears. Click the Change menu option."

Text Captions

A second menu bar appears. Click the Change menu option.

Click the **Change** option

Slide 5 - Slide 5

Text Captions

The Select Group screen displays.

Slide 6 - Slide 6

The screenshot shows the 'Employer eServices' interface. At the top, there are navigation tabs for 'Enrollment', 'ID Cards', and 'Claims'. Below these are links for 'Add', 'Terminate', 'Reinstate', 'Change', and 'Inquire'. A 'Log Out' button is in the top right. The main content area is titled 'Select Group from list, enter Employee Search criteria and select Search.' It contains a 'Select Group' dropdown menu with a red box around it and a callout box that says 'Click the Select Group menu'. Below this are search options: 'By Employee ID' (selected) and 'By Last Name', with input fields for 'Employee ID' and 'First Initial', and a 'Search' button. At the bottom of the main area are 'Help' and 'Continue' buttons. A footer contains links for 'Internet Service Agreement' and 'Contact Us'. A navigation bar at the bottom left has buttons for '1. Introduction', '2. Select', '3. Change', and '4. Try It!'. A large text box on the right side of the slide contains the instruction 'Click the Select Group drop-down menu.'

Text Captions

Click the Select Group drop-down menu.

Click the **Select Group** menu

Slide 7 - Slide 7

Text Captions

The Select Group drop-down menu appears. Select the group name with which the enrollee is associated.

Select Group Name

Slide 8 - Slide 8

Text Captions

After you select the group, you will need to identify the employee. You may search for an employee by employee ID or by last name.

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Text Captions

In this example, we will search by employee last name.

Click the **Last Name** button

Slide 10 - Slide 10

Text Captions

Enter the employee's last name. Note that you may do a wild card search by entering the first three characters of the last name, followed by an asterisk.

Slide 11 - Slide 11

Text Captions

Click the Search button.

Click the **Search** button

Slide 12 - Slide 12

The screenshot shows the 'Employer eServices' interface. At the top, there are navigation tabs for 'Enrollment', 'ID Cards', and 'Claims'. Below these are links for 'Add', 'Terminate', 'Reinstate', 'Change', and 'Inquire'. A 'Log Out' button is in the top right. The main content area is titled 'Select Group from list, enter Employee Search criteria and select Search.' It contains a 'Select Group' dropdown menu set to 'REED'S BUSINESS 0231110'. Below this are two search options: 'By Employee ID' (with a text input) and 'By Last Name' (with a text input containing 'DOE' and a 'First Initial' input). A 'Search' button is to the right. Below the search options is a 'Select Enrollee' dropdown menu, which is highlighted with a red box. A blue callout box with an arrow points to this dropdown, containing the text 'Click the **Select Enrollee** menu'. At the bottom left, there are four numbered buttons: '1. Introduction', '2. Select', '3. Change', and '4. Try It!'. At the bottom right, a text box contains the instruction: 'Click the Select Enrollee drop-down menu to select the employee's name from a list of matching search results.'

Text Captions

Click the Select Enrollee drop-down menu to select the employee's name from a list of matching search results.

Click the **Select Enrollee** menu

Slide 13 - Slide 13

The screenshot shows the 'Employer eServices' interface. At the top, there are navigation tabs for 'Enrollment', 'ID Cards', and 'Claims'. Below these are buttons for 'Add', 'Terminate', 'Reinstate', 'Change', and 'Inquire'. A 'Log Out' button is in the top right. The main content area is titled 'Select Group from list, enter Employee Search criteria and select Search.' It includes a 'Select Group' dropdown set to 'REED'S BUSINESS 0231110'. Under 'Employee Search', there are radio buttons for 'By Employee ID' and 'By Last Name', with the latter selected. A search box contains 'DOE' and a 'Search' button. Below this is a 'Select Enrollee' dropdown menu that is open, showing a list of employees. The entry 'DOE, JAMES (Employee) 987654123' is highlighted with a red box. A blue callout box with an arrow pointing to the highlighted entry contains the text 'Select Employee'. At the bottom left, there are four buttons: '1. Introduction', '2. Select', '3. Change', and '4. Try It!'. At the bottom right, a text box contains the instruction: 'The Select Enrollee menu displays. Select the correct employee from the list.'

Text Captions

The Select Enrollee menu displays. Select the correct employee from the list.

Select Employee

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Text Captions

The employee name you selected now appears in the Select Enrollee field. Click the Continue button.

Click the **Continue** button

Slide 1 - Slide 1

Text Captions

While in the change mode, you may update data on any of the tabs shown here.

Slide 2 - Slide 2

Employer eServices®

Enrollment ID Cards Claims Help Training Tutorials

Add Terminate Reinstatement **Change** Inquire Log Out

Enrollee: **JOHN DOE** Policy: **0011223** Insured ID: **111222333-01**
Policy Status: **A** Policy Anniversary: **08/01**

Employee Information **Demographic Information** Product Information Other Insurance Cobra (Optional)

Step 1 Employee Information Click the **Demographic Information Tab**

* Required Field

Date of Hire * 08/15/2006 SSN * 987654123

Date of Retirement MM / DD / CCYY

Print Help Continue

By using this web site you agree to our [Internet Service Agreement](#) [Contact Us](#)

1. Introduction 2. Select 3. Change 4. Try It!

In this example, we will begin by updating an employee's address.

Text Captions

In this example, we will begin by updating an employee's address.

Click the **Demographic Information Tab**

Slide 3 - Slide 3

Employer eServices®

Enrollment ID Cards Claims Help Training Tutorials

Add Terminate Reinstater **Change** Inquire Log Out

Scroll Up-U Scroll Down-D

Enrollee: **JOHN DOE** Policy: **0011223** Insured ID: **111222333-01**
Policy Status: **A** Policy Anniversary: **08/01**

Employee Information **Demographic Information** Product Information Other Insurance Cobra (Optional)

Step 2 Enter Demographic Information and select Continue or Submit. ** Required Field*

Original Effective

SSN Date of Hire *

Date of Birth * / /

Last Name * MI

First Name *

Address 1 *

1. Introduction **3. Change**
2. Select **4. Try It!**

The Demographic Information tab displays. Note that only fields displayed in white are eligible for updates while in change mode.

Text Captions

The Demographic Information tab displays. Note that only fields displayed in white are eligible for updates while in change mode.

Slide 4 - Slide 4

Employer eServices®

Enrollment ID Cards Claims Help Training Tutorials

Add Terminate Reinstate **Change** Inquire Log Out

Scroll Up-U Scroll Down-D

Enrollee: **JOHN DOE** Policy: **0011223** Insured ID: **111222333-01**
Policy Status: **A** Policy Anniversary: **08/01**

Date of Birth * 01 / 01 / 1975

Last Name * DOE

First Name * JAMES MI

Address 1 *
Address 2 *

City * ANYTOWN

State * MISSOURI Zip * 63301 -

Home Phone - -

Gender * MALE

Help Continue Submit

1. Introduction 2. Select 3. Change 4. Try It!

Update information as necessary.

Text Captions

Update information as necessary.

Slide 5 - Slide 5

Text Captions

Next, we will update Product Information for this Enrollee.

Click the **Continue** button

Slide 6 - Slide 6

The screenshot shows the Employer eServices interface. At the top, there are navigation links for Enrollment, ID Cards, and ManageAccess. The main header includes 'Enrollment ID Cards ManageAccess' and 'Help Training Tutorials'. Below this, there are buttons for 'Add', 'Terminate', 'Reinstate', 'Change', and 'Inquire', along with a 'Log Out' button. The user information section displays: Enrollee: JOHN DOE, Policy: 0011223, Insured ID: 111222333-01, Policy Status: A, and Policy Anniversary: 08/01. A tabbed interface shows 'Employee Information', 'Demographic Information', 'Product Information' (highlighted with a red box and labeled 'Highlight Box'), 'Other Insurance', and 'Cobra (Optional)'. The 'Product Information' tab is active, showing 'Step 3 Enter Product Information and select Continue or Submit.' Below this, there are fields for 'Effective Date of Change *' (MM / DD / CCYY) and a 'Get Coverage Period' button. A table lists coverage lines: MEDICAL, OCI, N, with a checked box and a date of 05/30/2007. Below the table are fields for Status (ACTIVE), Relationship* (EMPLOYEE), Dependent Coverage (SPOUSE ONLY), Medicare Eligible (NO), Primary Provider* (NOT SELECTED X), and Primary Provider Effective Date* (05/30/2007). At the bottom of the form are buttons for 'Help', 'Assign Primary Provider', 'Continue', and 'Submit'. A navigation bar at the bottom left contains buttons for '1. Introduction', '2. Select', '3. Change', and '4. Try It!'. A text box on the right contains the caption: 'The Product Information tab displays.'

Text Captions

The Product Information tab displays.

Slide 7 - Slide 7

Employer eServicesSM

Enrollment ID Cards ManageAccess Help Training Tutorials

Add Terminate Reinstatement **Change** Inquire Log Out

Scroll Up-U Scroll Down-D

Enrollee: JOHN DOE Policy: 0011223 Insured ID: 111222333-01
Policy Status: A Policy Anniversary: 08/01

Employee Information Demographic Information **Product Information** Other Insurance Cobra (Optional)

Step 3 Enter Product Information and select Continue or Submit. ** Required Field*

Effective Date of Change *: MM / DD / CCYY Get Coverage Period

Coverage Line	Coverage Description	Req'd	Coverage Select	Coverage Period Begin Date	Coverage Period End Date
MEDICAL	OCI	N	<input checked="" type="checkbox"/>	05/30/2007	

Status: ACTIVE Relationship*: EMPLOYEE
Dependent Coverage: SPOUSE ONLY Medicare Eligible: NO
Primary Provider*: NOT SELECTED X Primary Provider Effective Date*: 05/30/2007

Help Assign Primary Provider Continue Submit

1. Introduction 2. Select 3. Change 4. Try It!

From this tab, you may add, edit, or remove product selections.

Text Captions

From this tab, you may add, edit, or remove product selections.

Slide 8 - Slide 8

Employer eServicesSM

Enrollment ID Cards ManageAccess Help Training Tutorials

Add Terminate Reinstatement **Change** Inquire Log Out

Scroll Up-U Scroll Down-D

Enrollee: **JOHN DOE** Policy: **0011223** Insured ID: **111222333-01**
Policy Status: **A** Policy Anniversary: **08/01**

Employee Information Demographic Information **Product Information** Other Insurance Cobra (Optional)

Step 3 Enter Product Information and select Continue or Submit. ** Required Field*

Effective Date of Change *: MM / DD / CCYY

Coverage Line	Coverage Description	Req'd	Coverage Select	Coverage Period Begin Date	Coverage Period End Date
MEDICAL	OCI	N	<input checked="" type="checkbox"/>	05/30/2007	

Status: ACTIVE Relationship*: EMPLOYEE
Dependent Coverage: SPOUSE ONLY Medicare Eligible: NO
Primary Provider*: NOT SELECTED X Primary Provider Effective Date*: 05/30/2007

1. Introduction 2. Select 3. Change 4. Try It!

Keep in mind that changes to coverage are subject to the terms of your contractual agreement.

Text Captions

Keep in mind that changes to coverage are subject to the terms of your contractual agreement.

Slide 9 - Slide 9

Employer eServicesSM

Enrollment ID Cards ManageAccess Help Training Tutorials

Add Terminate Reinstatement **Change** Inquire Log Out

Scroll Up-U Scroll Down-D

Enrollee: **JOHN DOE** Policy: **0011223** Insured ID: **111222333-01**
Policy Status: **A** Policy Anniversary: **08/01**

Employee Information Demographic Information **Product Information** Other Insurance Cobra (Optional)

Step 3 Enter Product Information and select Continue or Submit. * Required Field

Effective Date of Change *: MM / DD / CCYY **Get Coverage Period**

Coverage Line	Coverage Description	Req'd	Coverage Select	Start Date
MEDICAL	OCI	N	<input checked="" type="checkbox"/>	

Status: ACTIVE Relationship*: EMPLOYEE
Dependent Coverage: SPOUSE ONLY Medicare Eligible: NO
Primary Provider*: NOT SELECTED X Primary Provider Effective Date*: 05/30/2007

Help Assign Primary Provider Continue Submit

1. Introduction 2. Select 3. Change 4. Try It!

To update product selections, enter the effective date of the change and click the "Get Coverage Period" button.

Text Captions

Click the **Get Coverage Period** button

To update product selections, enter the effective date of the change and click the "Get Coverage Period" button.

Slide 10 - Slide 10

The screenshot shows the 'Employer eServices' interface for a 'Change' operation. At the top, there are navigation tabs for 'Enrollment', 'ID Cards', and 'ManageAccess', along with 'Help', 'Training', and 'Tutorials'. Below this, there are buttons for 'Add', 'Terminate', 'Reinstate', 'Change', and 'Inquire', and a 'Log Out' button. The user information section displays: Enrollee: JOHN DOE, Policy: 0011223, Insured ID: 111222333-01, Policy Status: A, and Policy Anniversary: 08/01. A tabbed interface shows 'Product Information' is selected. The main content area is titled 'Step 3 Enter Product Information and select Continue or Submit.' It includes a date selection field for 'Effective Date of Change *' (MM/DD/CCYY) and a 'Get Coverage Period' button. A table lists coverage lines: MEDICAL (OCI, N, checked, 05/30/2007). Below the table are fields for Status (ACTIVE), Relationship* (EMPLOYEE), Dependent Coverage (SPOUSE ONLY), Medicare, Primary Provider* (NOT SELECTED X), and Primary Provider Effective Date* (05/30/2007). Buttons for 'Help', 'Assign Primary Provider', 'Highlight Box', and 'Submit' are present. A blue callout box points to the 'Continue' button with the text 'Click the Continue button.' A red box highlights the 'Highlight Box' button. A bottom navigation bar contains buttons for '1. Introduction', '2. Select', '3. Change', and '4. Try It!'. A large white box at the bottom right contains the text 'Click the Continue button.'

Text Captions

Click the Continue button.

Click the **Continue** button

Slide 11 - Slide 11

The screenshot shows the 'Employer eServices' interface. At the top, there are navigation tabs for 'Enrollment', 'ID Cards', and 'Claims'. Below these are links for 'Add', 'Terminate', 'Reinstate', 'Change', and 'Inquire'. A 'Log Out' button is in the top right. The main header area displays enrollee information: 'Enrollee: JOHN DOE', 'Policy: 0011223', 'Insured ID: 111222333-01', 'Policy Status: A', and 'Policy Anniversary: 08/01'. Below this is a tabbed interface with 'Other Insurance' selected and highlighted in a red box. The 'Other Insurance' tab contains the following text: 'Step 4 Enter other insurance information and select Continue or Submit. Any changes or updates to the member's Other Medical Health Insurance (Non-Medicare) information cannot be completed on-line. Other Medical Health Insurance information changes or updates can be sent directly to your eligibility remit address or can be submitted by the employee through myuhc.com. Any changes or updates to the member's Medicare information, can be made on-line or can be submitted by the employee through myuhc.com. On the day this coverage begins, will the enrollee be covered under any other medical plan or policy, including another UnitedHealthcare plan? Other Insurance [Unknown]. Other Health (Non-Medicare) Information: Other Insurance Effective [] Expiration []'. At the bottom left, there are four numbered buttons: '1. Introduction', '2. Select', '3. Change', and '4. Try It!'. At the bottom right, a blue-bordered box contains the text 'The Other Insurance Tab displays.' A blue arrow points from this box to the 'Other Insurance' tab.

Text Captions

The Other Insurance Tab displays.

Slide 12 - Slide 12

Employer eServices®

Enrollment ID Cards Claims Help Training Tutorials

Add Terminate Reinstate **Change** Inquire Log Out

Scroll Up-U Scroll Down-D

Enrollee: **JOHN DOE** Policy: **0011223** Insured ID: **111222333-01**
Policy Status: **A** Policy Anniversary: **08/01**

Not Enrolled in Medicare Part B

Medicare Part D: Can only be enrolled in Part D, if enrolled in part A and/or Part B

Enrolled in Medicare Part D: Effective Date [] / [] / [] Expiration Date [] / [] / []

Ineligible for Medicare Part D

Not Enrolled in Medicare Part D

Medicare Eligibility: Unknown

Help Continue **Submit**

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This is a private web site containing confidential information. Authorized site users should use this information for business purposes only. Any unauthorized use of

1. Introduction 3. Change
2. Select 4. Try It!

Update this information as necessary, then click the Submit button.

Text Captions

Update this information as necessary, then click the Submit button.

Click the **Submit** button

Slide 13 - Slide 13

The screenshot displays the Employer eServices interface. At the top, the logo 'Employer eServices®' is visible. Below it, a navigation bar includes 'Enrollment', 'ID Cards', and 'Claims', with 'Enrollment' highlighted. To the right are links for 'Help', 'Training', and 'Tutorials'. A secondary bar contains 'Add', 'Terminate', 'Reinstate', 'Change', and 'Inquire' (highlighted), along with a 'Log Out' button and 'Scroll Up-U' / 'Scroll Down-D' options. The main content area shows employee details: Enrollee: JOHN DOE, Policy: 0011223, Insured ID: 111222333-01, Policy Status: A, and Policy Anniversary: 08/01. A tabbed interface below has 'Employee Information' selected. Under this tab, a red-bordered box highlights the message 'Transaction Successful.' with the text 'Highlight Box' below it. To the right of this message is the text '* Required Field'. Below the message are input fields for 'Date of Hire *' (08/15/2006) and 'SSN *' (987654123), and a 'Date of Retirement' field. At the bottom of the form are 'Print', 'Help', and 'Continue' buttons. A footer contains the text 'By using this web site you agree to our Internet Service Agreement' and 'Contact Us'. A blue-bordered box at the bottom right contains the text: 'An inquiry-only screen will display a "Transaction Successful" message.' To the left of this box is a navigation menu with buttons for '1. Introduction', '2. Select', '3. Change', and '4. Try It!'.

Text Captions

An inquiry-only screen will display a "Transaction Successful" message.