

United eServices®

# Registration FAQs for Unlicensed Agency Personnel



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## 1. I'm not a broker but I work for an agency and/or broker. Can I use United eServices?

Yes, but you will need to be granted access by your Agency Administrator to see information for that Tax Identification Number (TIN) and/or your broker to see information tied to his or her social security number. After the broker and/or Agency Administrator have granted you access you will receive email(s) with instructions for accepting your pending permissions. The email(s) come from [UnitedeServices@uhc.com](mailto:UnitedeServices@uhc.com) with the subject line "United eServices Delegate Invitation". Please look for the email(s) in your spam filtering as they cannot be regenerated. If you don't receive the emails, call the Help Desk at 866-336-9369.

## 2. My broker or Agency Administrator doesn't know how to give me access.

- Brokers should login and select the My Account link and then click on Manage My Delegates.
- Agency Administrators should login and click the Administration link and then Manage Organization Users.

Brokers and Agency Administrators can also find Delegation Management Quick Reference Cards and eTraining in the Help & Training section on United eServices.

## 3. I need to act on behalf of my agency but we don't have an Administrator to give me access.

Agencies can have up to three Agency Administrators for United eServices. The agency Principal/Owner should fill out a United eServices Agency Administrator Add/Removal Form [add link to form] for the person(s) selected to be an administrator for the agency. Additional information about the process can be found in the Help & Training section of United eServices. After the Administrator is set up, he/she can grant access for others.

## 4. What's the difference between Agency Administrator, Agency Delegate and Broker Delegate?

### Agency Administrators

- Selected by an agency principal/owner and can see all information pertaining to the agency's TIN.
- Can grant United eServices access to other agency employees (who become Agency Delegates) and select permissions for each user.

### Agency Delegates

- Granted access to United eServices for the agency's TIN.
- Access may be limited to certain functions by the Agency Administrator.
- Cannot grant access to others.
- May also be a Broker Delegate for one or more brokers.

### Broker Delegates

- Granted access by one or more brokers to see information pertaining to specific Social Security Number(s).
- Access may be limited to certain functions by the broker.
- Cannot grant access to others.
- May also be an Agency Delegate or Administrator

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## 5. I currently have access as a delegate for one broker, can I add another?

Yes, other brokers can also give you delegate access. They will need your current User Name to set you up.

## 6. I am the Administrator for United Advantage; does that mean I'm the Administrator for United eServices?

No, the access is entirely separate.

## 7. I have a username and password already. Why can't I see info for broker X?

There are a few possible reasons:

### • Has the broker in question given you broker delegate access?

You may only have access as a delegate of your agency or for other brokers. Broker John D. will have to appoint you as his delegate as well in order for you to act on his behalf and see his information.

### • Did you accept your pending relationship?

After the broker assigns you delegation privilege in UeS you will receive an email with instructions for accepting the pending relationship. Until you accept the pending relationship you will not see the broker's information.

### • Did you select the broker in the "acting on behalf of" drop down box?

If you have multiple delegation roles (agency and broker for example) you will need to select who you are "acting on behalf of" to see the corresponding information.

### • Has the broker given you all the functionality you need?

Ask your broker for additional permissions if needed. Available permissions to a broker delegate are:

Permissions	Select
<b>Quoting</b> View and copy existing quotes and create new quotes on my behalf.	<input type="checkbox"/>
<b>Commissions</b> View book of business and renewal package; generate ARQs.	<input type="checkbox"/>
<b>License and Appointments</b> View my Licenses & Appointments with UnitedHealthcare.	<input type="checkbox"/>
<b>Late Premium &amp; Cancel Case Alerts</b> Allow delegate to receive my Late Premium & Cancel Alerts.	<input type="checkbox"/>
<b>Receive Messages</b> Allow user to receive messages on behalf of their broker.	<input type="checkbox"/>

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**8. I have been given access to United eServices by broker Jane D. Why can't I see commission statements for our agency?**

There are a few possible reasons:

- **Has the Agency Administrator granted you agency delegate access or do you only have broker delegate access?**

You are currently a broker delegate of Jane D's. Your Agency Administrator must grant you access as an Agency Delegate as well in order for you to act on behalf of the agency.

- **Did you accept your pending relationship?**

After the Agency Administrator assigns you delegation privilege in UeS you will receive an email with instructions for accepting the pending relationship. Until you accept the pending relationship you will not see the agency's information.

- **Did you select the agency in the "acting on behalf of" drop down on the home, renewal or commissions page?**

If you have multiple delegation roles (agency and broker for example) you will need to select who you are "acting on behalf of" to see the corresponding information.

- **Has the agency given you all the functionality you need?**

Ask your Agency Administrator for additional permissions if needed. Available permissions to an agency delegate are:

Permissions	Select
<b>Quoting</b> View and copy existing quotes and create new quotes on my behalf of your organization.	<input type="checkbox"/>
<b>Commissions</b> View all commission statements made payable to your organization.	<input type="checkbox"/>
<b>Renewals</b> View and download renewal policy information and packages on behalf of your organization.	<input type="checkbox"/>
<b>General Agent Sales Representative</b> Allows the user to be selected as the General Agent Sales Representative on a new business quote.	<input type="checkbox"/>
<b>Late Premium &amp; Cancel Case Notifications</b> Users with Late Premium cancel Case Permissions will be able to view Late Premium and cancellation Notifications.	<input type="checkbox"/>
<b>Late Premium &amp; Cancel Case Notifications</b> Users with Late Premium cancel Case Permissions will be able to view Late Premium and cancellation Notifications.	<input type="checkbox"/>