

UnitedHealthcare

**SAM**

Sales Automation  
Management



## Small Group Quoting

Get online quotes for your small group clients — in minutes

# SAM provides an efficient, clear and simple way to quote and enroll small group business with UnitedHealthcare.

Now you can quickly and easily comparison shop products and prices for your clients and access benefit details by plan — faster than ever — with SAM.

**More control. Easy to use. And faster than ever. With SAM, you can:**

- ▶ Input minimal group data and plan requirements
- ▶ Filter and compare multiple plan options for your client
- ▶ Quote, generate and email medical and specialty proposals in minutes
- ▶ Continue the process using the online enrollment functionality when your client is ready to move forward



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## Simple Login:

- ▶ Go to [www.UnitedeServices.com](http://www.UnitedeServices.com)
- ▶ Enter User ID and Password, Click **Login**
- ▶ Choose **SAM**

Your SAM Dashboard allows you to monitor and manage sales pipeline and case progress.



## Run quotes quickly and simply – in four easy steps



COMPANY PROFILE



EMPLOYEE CENSUS



PLAN SELECTION



QUOTE SUMMARY

## TO START

Click **Activities** on the top navigation bar, Select **New Quote**



### COMPANY PROFILE

- ▶ Enter all required **Company Profile** information (fields marked with an asterisk\*) including Company Name, ZIP Code, Requested Effective Date, Total Eligible Employees, Total Employees Applying, and SIC Code
- ▶ Click **Continue** to proceed to the next screen
- ▶ Confirm **Primary Location** information and answer the questions on this page
- ▶ Click **Continue**

To make the sales process as efficient as possible, the information you enter here is carried through from quote to enrollment in SAM.



Hover over this icon for more information on a specified data field

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## EMPLOYEE CENSUS

You have two options for completing the Employee census:

### OPTION 1: Enter Employee Census Manually, One at a Time

- ▶ To enter the census manually, simply Click **Add Employee** and complete all required fields for each employee (including Age, Smoker, Gender and Employment Status; Note that Salary and Date of Birth are required if quoting Life & Disability)
- ▶ Click **Add Employee** to add another employee
- ▶ During this process, you can Click **Save** to save your census and return to finish it later
- ▶ When you have finished entering all employees, Click **Save**

### OPTION 2: Import Census from a Template

- ▶ Click **Download Census template** and add the employee information to the Excel template (*there is a link with instructions for working with the census template*)
- ▶ When your census file is complete, Click **Upload Census**
- ▶ Locate your census file, select it and Click **Open**

Your census data are displayed and will carry forward to enrollment later in the process

Click **Continue** to shop for medical plans

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## PLAN SELECTION

Plan options are laid out in a style similar to other modern online shopping experiences. You can choose to Show All Plans, Compare Plans, or view Plan Details. You can sort plans by Premium and even mark specific plans as Favorites.

- ▶ Use the **Filters** on the Left navigation bar to sort plans and narrow selections based on your criteria
- ▶ Click **Add to Quote** to add a plan to your quote
- ▶ Click **Remove from Quote** to remove a plan
- ▶ You must quote a Vision plan with your medical quote. To add specialty products, like Vision or Dental, Click that product line from **Available Products** on the left navigation bar.
- ▶ When you're finished selecting the plan and product options you want to quote, Click **Continue**.

### Plan Display Options



- Show all plans
- Compare plans
- View plan details

Simply add plans to or remove plans from your quote

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## QUOTE SUMMARY and Generate a Proposal

- ▶ If you want to share employer contribution comparisons in your quote, Click **Employer Contribution Amount** to enter the dollar amount or percentage the employer will contribute
- ▶ Review plan selections
- ▶ Click **Generate Proposal**
- ▶ To personalize and email your proposal: Note Recipients; Add your Subject line and message
- ▶ Choose **Document Type**: PDF or Excel
- ▶ Choose from **Optional Proposal Documents** (+) including cover page and product grids
- ▶ Click **Preview Proposal** to review it before you send it, close the window when you are done
- ▶ Click **Send Proposal** to send to the email recipients noted earlier and you are done!

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## GET STARTED USING SAM — AND BEGIN ENJOYING THE BENEFITS OF FASTER CASE SUBMISSION TODAY!

- ▶ Go to **www.UnitedeServices.com**
- ▶ Enter User ID and Password, Click **Login**
- ▶ Choose **SAM**

If you have any questions about how to enroll a group online, please contact your UnitedHealthcare representative.

Insurance coverage provided by or through UnitedHealthcare Insurance Company or its affiliates.  
Administrative services provided by United HealthCare Services, Inc. or their affiliates.

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