UnitedHealthcare Agent Toolkit QUICK START GUIDE



NOTE: The Quick Start Guide was created using a UnitedHealth Producers account; however this guide applies to both UnitedHealth Producers and Advisors.

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Welcome to the UnitedHealthcare Agent Toolkit!

The UnitedHealthcare Agent Toolkit allows you to create customized marketing materials with targeted messages quickly and easily. The materials are designed to help you drive leads effectively while ensuring compliance with regulatory, CMS and branding standards.

Accessing the Toolkit through the UnitedHealth Producers Portal

To access the Toolkit, type www.unitedhealthproducers.com in your Internet browser. Then, enter your UnitedHealth Producers username and password in the lower right corner and click "Go".



Then, click on the "Product Information and Materials" tab on the top navigation bar.



Click on the Agent Toolkit navigation bar



Click on the "Agent Toolkit" details in the Agent Toolkit navigation bar



Click on the "click here to link to Agent Toolkit" hyperlink

Learning Product Information & & Materials	Online Applications Commission & Manage Court Center
Products and Materials Sales Material Admin Tool Product Information Authorized to Offer Materials Agent Toolkit Agent Toolkit Details	Agent Toolkit Click here to link to the Agent Toolkit Vhat is the Agent Toolkit is an online tool that allows you to create customized marketing materials with targeted messages quickly and easily. The materials are designed to help you drive leads effectively while ensuing compliance, regulatory, CMS and branding standards. All field agents licensed and certified to sell UntedHealthcare Medicare plans (MA, PDP, and Medicare Supplement) have access to the Agent Toolkit. Helpful Materials Other helpful Agent Toolkit materials include the following:
	图 Agent Toolkit Quick Start Guide

Navigating around the Toolkit

The Toolkit home page displays highlights, news and marketing best practices. Be sure to check the home page for updates on a regular basis.

Click on the "English Material" tab to access English language marketing material. Or you may select the "Other Languages" tab to access other language marketing material, such as Spanish, Chinese and Korean.



Material is separated by Plan-specific material, comprehensive marketing programs and informational sales support materials.. To promote a product or benefit, such as UnitedHealthcare Medicare Solutions, select a category under Plan-specific Marketing. To promote a specific message or campaign, such as Medicare Made Clear, select a category under Comprehensive Marketing Programs. To obtain informational sales material on products and programs offered by UnitedHealthcare, such as ancillary programs, select a category under Informational Sales Support Materials.To access material select the folder icon located next to the desired category.



Citrus Health Plan

Choose from an assortment of materials and campaigns for the Citrus Health Plan products in your market. Inside you will find materials for both the Dual and Non-Dual Medicare Advantage products. **What's Available?** Meeting and non-meeting flyers, ads, direct mail, postcards and posters. Additional support pieces such as the pharmacy saver flyer and brochures are also available.



Medicare Supplement & Prescription (PDP)

Medicare Supplement and Part D plans are a natural combination. Use these materials to sell the two plans as a complete package. What's available? Flyers, mailers, free standing inserts, advertisements, and letters with meeting and non-meeting versions as well as other support materials.



Physicians Health Choice

Choose from an assortment of materials and campaigns for the Physicians Health Choice products in your market. Inside you will find materials for both the Dual and Non-Dual Medicare Advantage products. What's Available? Meeting and non-meeting flyers, ads, direct mail, postcards and posters. Additional support pieces such as the pharmacy saver flyer and brochures are also available.



Prescription Drug Plans (PDP)

Material available to help advertise upcoming community meetings and encourage prospects to set up a meeting to discuss Part D options. What's available? Meeting and non-meeting flyers, including the Pharmacy Saver Flyer



UnitedHealthcare Dual Complete

Choose from an assortment of materials and campaigns for the UnitedHealthcare Dual Complete products in your market. What's Available? Meeting and non-meeting flyers, ads and posters. Additional support pieces such as the pharmacy leave behind flyer, pocket folder and brochures are also available.



UnitedHealthcare Medicare Solutions

Choose from an assortment of materials and campaigns for the UnitedHealthcare MedicareComplete products in your market.

What's Available? Meeting and non meeting ads, flyers, postcards, and posters

To view material options, select a message or campaign using the icons located to the left of the screen.

UHP	UnitedHealth PRODUCERS [*]
Home	inglish Material Other Languages In Progress Archive Profile Support
Start a doo	cument
To build your	piece, dick on a category or piece of media below
English Materia	I > UnitedHealthcare Medicare Solutions
	General Newspaper Ads Looking to sell any of the Medicare products within the UnitedHealthcare Medicare Portfolio? Use these pieces to help drive traffic to community meetings or 1 on 1 appointments. These materials are a great way to maintain your book of business throughout the year. What's available Quarter page, half page and full page meeting and non-meeting ads
	Losing your Medicare health plan? Did a major competitor exit from your market? Is there an employer group in your area who has decided not to offer retiree coverage? Reach those prospects that are losing their Medicare health plan and encourage them to enroll in a UnitedHealthcare Medicare plan. What's available? Meeting and non-meeting flyers, direct mail, postcards and posters
	More Benefits than Original Medicare Medicare Advantage or Original Medicare? Help beneficiaries understand what additional benefits they get from enrolling in a Medicare Advantage plan from UnitedHealthcare. What's available? Meeting and non-meeting flyers, direct mail, postcards and posters
	Plan Expansion Is there a new plan offering in your area? If so, reach out to prospects in these markets and encourage them to enroll in an UnitedHealthcare MedicareComplete plan. What's Available? Meeting and non-meeting flyers, direct mail, postcards and posters

At any time you may search for material using the search field at the top right corner of the page. Enter a keyword and click "Search" to populate results.

UnitedHealth PRODUCERS*

Home	English Material Other Languages In Progress Archive Profile Support
Start a do	cument piece, click on a category or piece of media below
English Materi	al
Plan-sp	ecific Marketing
C	What's Available? Meeting and non meeting flyers, postcards, and posters
	AARP Medicare Supplement AARP Medicare Supplement AARP Medicare Supplement - Grow your book of business throughout the year with AARP Medicare Supplement lead generation materials for authorized to offer (A2O) Level 1 and Level 2 agents. Campaigns are available with a variety of messages to reach your target audience. What's available? Flyers, mailers, ads, postcards and letters in both meeting and non-meeting versions. Additional support pieces such as fact sheets and brochures are also available
	Citrus Health Plan Choose from an assortment of materials and campaigns for the Citrus Health Plan products in your market. Inside you will find materials for both the Dual and Non-Dual Medicare Advantage products. What's Available? Meeting and non-meeting flyers, ads, direct mail, postcards and posters. Additional support pieces such as the pharmacy saver flyer and brochures are also available.

Profile

To access your Toolkit account information select the "Profile" tab. Click "Edit Profile" to update your profile information. Please note your profile information is used to populate marketing pieces available on the Toolkit.

UnitedHealth PRODUCE	R S*	
Home English Material Other Languages	In Progress Archive Profile Support Logout	
My Profile 🥈		
Review your personal information. Click 'Edit Profile' to mak	te changes.	
Edit Profile Change Password Address Book		
Changes to your profile only apply to materials you o UnitedHealthcare, please contact the Producer Help I	reate on the Agent Toolkit. To change your information on file with Desk.	
Full Name:	John Smith	
First Name:	John	
Last Name:	Smith	
Company Name:	UnitedHealthcare	
Hue: Bhope Number: (Example: 122-456-7990)	UnitedHealthcare Medicare Solutions	
E-mail Address: (Example: iohn_smith@aol.com)	iohn smith@aol.com	
Address 1:	123 Main Street SE	
Address 2:		
City:	Eden Prairie	
State/Province:	MN	
Postal Code: (Example: 55344)	55344	
Toll Free Number:		
Optional Image Assets:		
Upload Photo File	Upload Logo File	
Requirements: Sample	Requirements: Sample	
 2 in x 2 in Photo presents full head from top of hair to shoulders Take the photo in a plain white or off-white background File Resolution - 300dpi JPEG - Color 	• Size - 3in x 3in - (whichever size width or height at 3 inches is met first) • File Resolution - 300dpi JPEG - Color	
Current Files:		
Upload Service Agreement: Uploads will be approved for use within 2 business day via email if your upload is approved or requires change	rs. Upload requirements must be met to obtain approval. You will be notified s. Please be sure the email address in your Toolkit profile is accurate and up to	

After changing your information, click "Accept" to save the changes.

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OTTE PRODUCERS	
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Hollie English Material Other Languages In Progress Archive Prolife Support	
Edit My Profile 🥈	
Edit your personal information. Click Accept to confirm your updates or Cancel to ignore them.	
Accept Cancel	
Changes to your profile only apply to materials you create on the Agent Toolkit. To change your information on file with UnitedHealthcare, please contact the Producer Help Desk.	
Full Name:	
John Smith	
First Name:	
John	
Last Name:	
Smith	
Company Name:	
UnitedHealthcare Medicare & Re	
Title:	
UnitedHealthcare Medicare & Re	
Phone Number: (Example: 123-456-7890)	
123-456-7890	
E-mail Address: (Example: john_smith@aol.com)	
john_smith@aol.com	
Address 1:	
123 Main Street SE	
Address 2:	

Please note changes to your profile only apply to materials you create on the Agent Toolkit. To change your information on file with UnitedHealthcare, please contact the Producers Help Desk.

You may also upload your photo and company logo (if applicable) in your Profile. Click "Upload Photo File" to locate and submit your photo for approval. Then click "Upload Logo File" to locate and submit your logo for approval. Uploads will be approved for use within 2 business days. Please note, upload requirements must be met to obtain approval.



In Progress

The "In Progress" tab contains your saved orders that are not completed. Click on a thumbnail image to continue working on a piece. The buttons at the top and bottom of the cart allow you to proceed to checkout and continue shopping. Under the options column on the right side of the screen you can edit your piece, preview your piece as a low resolution PDF, duplicate a piece, hold a piece until you are ready to process it, or delete it.

Home En	plish Material Other Languag	es In Progress Ard	vive Profile Su	pport		Logost
Shopping C Items to buy no	Cart 🐖 w: dick Proceed to Checkout' to or	der the contents of your shop	ang cart			
Proceed to Check	Continue Shopping		and Area and a			
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Proceed to Check Hold for La Rems to buy lat	ter er: dick Move to Cart' to move an i Description	tem back to the shopping cart Product	for purchase Date Modified	Quan	Subto	tal: \$0.00
	8 1/2 = 31 Non-Meeting Flyer	8 1/2 × 11 Non-Reeting	9/22/2010 4:19 PM	1	Edit POF Preview Duplicate	i Delete

Items in the "Hold for Later" section are incomplete or are waiting to be processed. Once the items are completed or ready to be processed select "Move to Cart" under the options column.

Archive

The "Archive" tab contains completed marketing pieces. Go to the "Archive" tab to re-order a piece, submit an Ad to a publication, download a piece, or review past order history. Click "Details" in the options column of the piece you want to view.

All of your recent and pa View: All Orders Order	ist order submissions can	be found here.			
Order					
order	Countered	Manage	Total Pales	Status .	Custores
G-OVATIONS-F92D66F5	9/22/2010 3:54 PM	8 1/2 x 11 Non-Meeting Flyer	\$0.00	Completed	Detais
G-OVATIONS-81967DCC	9/17/2010 11:19 AM	7 1/2 x 12 Non-Meeting Newspaper Ad	\$0.00	Completed	Details

On the next screen, you can submit your piece to publication, reorder a piece or download your piece for printing. Simply click on the action you desire under the "Options" column.

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G-OVATIONS	S-B1567DCC 🆚							
Order summary								
Go Back								
Order G-OVATIONS	-B1567DCC, created 9/1	7/2010 11:19 AM						
	14500 Martin Drive Ste 1000 Eden Prairie, MN 553	44						
Item	Description	Product	Quantity	Status	Comments	Options	Destination	Price
Anno?	7 1/2 x 12 Non- Meeting Newspaper	7 1/2 x 12 Non- Meeting Newspaper Ad	1	Shipped		Publication Submit Reorder Details	Lindsey Bechstein	\$0.00
D-OVATIONS-F91	LFF33E					Download		
D-OVATIONS-F91	JFF33E					Download Subt Shipj Tax	otal ping	\$0.00 +\$0.00 +\$0.00
D-OVATIONS-F91	IFF33E					Download Subb Shipy Tax Total	otal ping Price	\$0.00 +\$0.00 +\$0.00 \$0.00

Building an Ad

To begin, click on the "English Material" tab to access English language marketing material. Select the folder icon located next to the desired category.

UHP	UnitedHealth PRODUCERS*
Home	inglish Material Other Languages In Progress Archive Profile Support
Start a doo	cument Search
English Materia	piece, click on a category or piece of media below
Plan-spe	ecific Marketing
	AARP MedicareComplete Choose from an assortment of materials and campaigns for the AARP MedicareComplete products in your market. What's Available? Meeting and non meeting flyers, postcards, and posters
	AARP Medicare Supplement AARP Medicare Supplement - Grow your book of business throughout the year with AARP Medicare Supplement lead generation materials for authorized to offer (A2O) Level 1 and Level 2 agents. Campaigns are available with a variety of messages to reach your target audience. What's available? Flyers, mailers, ads, postcards and letters in both meeting and non-meeting versions. Additional support pieces such as fact sheets and brochures are also available.
	Citrus Health Plan Choose from an assortment of materials and campaigns for the Citrus Health Plan products in your market. Inside you will find materials for both the Dual and Non-Dual Medicare Advantage products. What's Available? Meeting and non-meeting flyers, ads, direct mail, postcards and posters. Additional support pieces such as the pharmacy saver flyer and brochures are also available.

Next, select a piece from the available options. You are now ready to customize your Ad using the form fill screen.



Beginning at the top of the form fill screen, use the pull down menu to select the desired Ad output size. Select the Ad size that is closest to, but no larger than, the Ad size required by the publication. You can increase your Ad size up to 120%.

Next, select the desired headline and subheadline if available. If you have selected a piece with variable information, fill in the box as prompted. Please note that if there is only one headline option or no variable information, no fields will appear.

If available, select the benefits you want to promote. Choose by clicking on the boxes to the left of the benefit to select or deselect.



Next, check your contact information, again making sure it is formatted correctly.

Note: Depending on the piece, you may have the option to include your photo and logo. If you choose not to display your photo and/or logo, deselect the checkbox next to "Use Agent Photo" and/or "Use Agent Logo". Please note, if you have not uploaded your photo and/or logo you may do so in your Profile.

After you have completed all the information on the form fill screen, click the "Update" button located at the top or bottom of the screen. If any information is incorrect or if a field requiring a value is left blank, the field will be flagged in red.

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learn more about your			
Medicare options.			
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Name			
Lora Johson			
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		NEXT STEP	

Correct the information and click "Update".

C Learn more about	enerali at 3-550-161-1364, TTY 713, from 8 a.m. to 8 p.m. local time, 7 shows week. Or visit our websits at	No.
Medicare.	www.UFICMidiandolutona.com. Y0266 120120 184446 File & Une 01992012 3595268 8902	
O Are you ready for		
Medicare?		
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Lora Johnson		
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When your piece has no errors, click "PDF Preview". A low resolution PDF will appear. Use the PDF to review your piece carefully, making sure there are no spelling or punctuation errors. Remember, this PDF proof is low resolution and not suitable for print. To obtain a print ready PDF without watermark you must continue through the process.



To continue and complete your piece, select "Next Step" on the right top or bottom corner of your screen. The next screen summarizes your order.

UHP UnitedHealth	S*
Home English Material Other Languages In Progr Editing Steps Create a Document 🔀	ress Archive Profile Support
1 Form Filling Finish Form Filling: Fill out the form to change the Preview' to view changes.	ne document. Click on 'Update' or 'PDF *** STAGED CONTENT ** Step 1 of 2
Update PDF Preview Select ad output size: Choose the ad size closest to, but no larger than, the actual ad size required by the publication 100% - 8 1/2 x 11 ✓	Constant and the set of the
Select an image: Image 1	Constraints of the set of th
Image 1 Image 2 Choose your headline: () Learn more about	The order of A. A.B. Markans. Plans related the PLIC Proceedings Tong Plans, Mathicans Experiment, Instrument The first of A.B. Markans. Plans related the PLIC Proceedings of the PLIC Plans, Planting and Plans, Planting Plans, Plans, Planting and Plans, Planting and Plans, Planting and Plans, Planting Plans, Plans, Planting Plans, Plans, Planting Plans, Plans, Planting and Plans, Planting Plans, Planting Plans, Plans, Planting Plans, Plans, Planting Plans, Plans, Planting Plans, Planting Plansi, Planting Planting Plansi, Planting Planting Planting Plansi, Planting Plan

You can re-name the description of your piece on this screen by highlighting the name in the description field and entering the new name.



When you are satisfied with your piece and are ready to place the order click "Add to Shopping Cart". Then, on the shopping cart screen click "Proceed to Checkout" at the top or bottom left.

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Home Engl	ish Material Other Langua	ges In Progress Archive	Profile Su	pport		Logout
Shopping Car	t 🛒	• • •				
Items to buy now	I: click 'Proceed to Checkout' to c	order the contents of your shopping cart				
If you have a dis	count code, please enter it l	nere:				
Apply Discount						
Apply Discount						
18 1/.	2 x 11 AARP New to Medi	care "Learn More" Ad' has beer	n added to t	he Shonnir	nd (art	
Proceed to Checko	ut Continue Shopping				ig care.	
Proceed to Checko	Continue Shopping		Data		ig care.	
Proceed to Checko	Continue Shopping Description	Product	Date Modified	Quantity	Options	Price
Proceed to Checko	Description	Product	Date Modified	Quantity	Options	Price
Proceed to Checko	Description	Product 8 1/2 x 11 AARP New to	Date Modified	Quantity	Options Edit PDF Preview	Price

Review your order and then select "Place Order" at the top or bottom left of the screen and your piece will be added to the "Archive Tab". Please note that your order is not complete until you click "Place Order".

🧿 1 Order	Order: Review and place y	our order for production				Step 1 o
	Please note: Toolkit charges credit card statement as com Cancellation Policy: Orders that have been place within one business day after We require you to check you responsibility for the order. O given. We cannot issue refur	will be identified on your ing from Brandspring Soluti d can only be cancelled if the r your order is placed. r online proof thoroughly bel once an order is printed as t ds on cutsom printed produ	ons who manages the toolkit a job has not been printed. Plea fore submitting your order. By pl he customer ordered, no return a ts due to customer typos, or or	and transactions se note, print pr lacing your order will be accepted missions.	s, oduction begins you assume and no refund wi	day of or II be
	Place Order		Cancel Checkout			
	Item	Description	Product	Date Modified	Quantity	Price
		8 1/2 x 11 AARP New to Medicare "Learn More" Ad	8 1/2 x 11 AARP New to Medicare "Learn More" Ad, black and white	4/4/2012 2:56 PM	1	\$0.00
	D-OVATIONS-10CA39AB					
					Subtotal Shipping	\$0.00 +\$0.00

Once you click "Place Order", you will be directed to your order summary, located in the "Archive" tab.

Your piece is available for download immediately after you place your order. If you have trouble accessing your item, refresh the page to view an active download link.

Home English Mai	itedHeal	th UCERS [*] Languages In Progress Archive Profile St	upport		Logout
All of your recent and pa /iew: All Orders	st order submissi	ons can be found here.			
Order	Created	Items	Total Price	Status	Options
G-OVATIONS-9D467E4A	4/4/2012 2:57 PM	8 1/2 x 11 AARP New to Medicare "Learn More" Ad	\$0.00	𝗭 Completed	Details
G-OVATIONS-0EC009A5	4/3/2012 11:51 AM	9 x 6 Low Income Subsidy Postcard	\$0.00	Completed	Details
G-OVATIONS-9CC409AF	4/2/2012 11:23 AM	VIETNAMESE 8 1/2 x 11 Dual SNP Flyer, with benefits	\$0.00	𝒞 Completed	<u>Details</u>
G-OVATIONS-283609A5	4/2/2012 10:15 AM	<u>8 1/2 x 11 Physicians Health Choice Referral Letter</u> <u>8 1/2 x 11 Citrus Health Care Referral Letter</u>	\$0.00	𝒞 Completed	<u>Details</u>
G-OVATIONS-9EB0D968	3/30/2012 8:27 AM	8 1/2 x 11 UnitedHealthcare Dual SNP Sales Flyer with ID Card 8 1/2 x 11 UnitedHealthcare Dual SNP Sales Flyer with ID Card 8 1/2 x 11 UnitedHealthcare Dual SNP Sales Flyer with ID Card	\$0.00	𝗭 Completed	<u>Details</u>

To download your item, click on the item name. Click Open to view the PDF or Save to save the PDF to your computer. The Proof watermark will no longer appear on the document.



Submitting an Ad to a Publication

After you place your order, you have the option to submit your Ad directly to the publication. First, click on the "Archive" tab to access your Ad. Locate your Ad in the order summary. Then, select the "Details" link under the "Options" column.

Home English Mat	terial Other L	anguages In Progress Archive Profile Su	pport		Logou
All of your recent and pa /iew: All Orders	st order submissio	ns can be found here.			
Order	Created	Items	Total Price	Status	Options
G-OVATIONS-9D467E4A	4/4/2012 2:57 PM	8 1/2 x 11 AARP New to Medicare "Learn More" Ad	\$0.00	𝗭 Complete	Details
G-OVATIONS-0EC009A5	4/3/2012 11:51 AM	9 x 6 Low Income Subsidy Postcard	\$0.00	S Completed	Details
G-OVATIONS-9CC409AF	4/2/2012 11:23 AM	VIETNAMESE 8 1/2 x 11 Dual SNP Flyer, with benefits	\$0.00	𝒞 Completed	<u>Details</u>
G-OVATIONS-283609A5	4/2/2012 10:15 AM	8 1/2 x 11 Physicians Health Choice Referral Letter 8 1/2 x 11 Citrus Health Care Referral Letter	\$0.00	𝒞 Completed	<u>Details</u>
G-OVATIONS-9EB0D968	3/30/2012 8:27 AM	8 1/2 x 11 UnitedHealthcare Dual SNP Sales Flyer with ID Card 8 1/2 x 11 UnitedHealthcare Dual SNP Sales Flyer with ID Card	\$0.00		Details

Next, select "Publication Submit". In the "publication submittal" pop up window, enter the publication's email address and any special instructions such as Ad placement and specs.

pts Performed Page - Windows Internet Fynlorer	rings 🥭 ** STAGED CON	ITENT ** 🗙 [🚫 Webvant	age - The Advanta	g		
	J C E R	S*	hive F	Profile Su	pport		Logout
Publication Submittal Enter the email address of the publication you would like to send the ad to and any placement notes required: Larry@plublications.net Enter any special instructions you may have regarding the placement of your ad:	2012 2:57 PM						
Special instructions here	4 Product	Quantity	Status	Comments	Options	Destination	Price
Process Internet D-OVATIONS-10CA39AB	8 1/2 x 11 AARP New to Medicare "Learn More" Ad, black and white	1	Shipped	(Publication Submit Reorder Details Download	Lora Chapman	\$0.00
					Subto Shipp Tax Total Paym	otal bing Price ent Received	\$0.00 +\$0.00 +\$0.00 \$0.00
					Balar	ice Due	\$0.00

Click "Process" to review the Ad before you submit the piece. If everything is correct, click "Submit to Publication". The Ad will be e-mailed to the publication.



Building a Flyer, Postcard, or Mailer

To begin, click on the "English Material" tab to access English language marketing material. Select the folder icon located next to the desired category.

nome	English Material Other Languages In Progress Archive Profile Support
Start a do	ocument 📝
To build you	r piece, click on a category or piece of media below
English Mater	ial
Plan-sp	ecific Marketing
	What's Available? Meeting and non meeting flyers, postcards, and posters
	AARP Medicare Supplement AARP Medicare Supplement - Grow your book of business throughout the year with AARP Medicare Supplement lead generation materials for authorized to offer (A2O) Level 1 and Level 2 agents. Campaigns are available with a variety of messages to reach your target audience. What's available? Flyers, mailers, ads, postcards and letters in both meeting and non-meeting versions. Additional support pieces such as fact sheets and brochures are also available.
6	Citrus Health Plan Choose from an assortment of materials and campaigns for the Citrus Health Plan products in your market. Inside you wi find materials for both the Dual and Non-Dual Medicare Advantage products. What's Available? Meeting and non-meeting flyers, ads, direct mail, postcards and posters. Additional support pieces such as the pharmacy saver flyer and brochures are also available.
	Medicare Supplement & Prescription (PDP) Medicare Supplement and Part D plans are a natural combination. Use these materials to sell the two plans as a

If available, select a message or campaign to view material options.

Description Description Home English Material Other Languages Archive Profile Support Logout Start a document Image Image Archive Profile Support Logout To build your piece, click on a category or piece of media below: Image	Como	
Start a document Search To build your piece, click on a category or piece of media below Search To build your piece, click on a category or piece of media below Search Start a valuable click on a category or piece of media below Search Start a valuable click on a category or piece of media below Search Start a valuable click on a category or piece of media below Search Start a valuable click on a category or piece of media below Search valuable Start a valuable click on a category or piece of media below Search valuable Start a valuable click on a category or piece of media below Search valuable Start a valuable click on a valuable click on a valuable piece piece of piece of piece of piece of piece piece of piece of piece of piece of piece of piece piece click and piece piece of piece piec	UH	PRODUCERS [®]
To build your piece, click on a category or piece of media below English Material > UnitedHealthcare Medicare Solutions Image: Start a document is presented by the medicare solutions Image: Start a document is presented by the medicare products within the UnitedHealthcare Medicare Portfolio? Use these pieces to help drive traffic to community meetings or 1 on 1 appointments. These materials are a great way to maintain your book of business throughout the year. Image: What's available Quarter page, half page and full page meeting and non-meeting ads Image: Start a document is presented by the page and full page meeting and non-meeting ads Image: Start a document is presented by the page and full page meeting and non-meeting ads Image: Start a document is presented by the page and full page meeting and non-meeting ads Image: Start a document is presented by the page and full page meeting and non-meeting ads Image: Start a document is presented by the page and full page meeting and non-meeting ads Image: Start a document is presented by the page and full page meeting and non-meeting ads Image: Start a document is presented by the page and full page meeting and non-meeting ads Image: Start a document is presented by the page and full page meeting and non-meeting ads Image: Start a document is presented by the page and full page meeting and non-meeting flyers, direct mail, postcards and posters Image: Start a document is presented by the page of Original Medicare? Help beneficiaries understand what additional benefits	Start a	degument
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		Plan Expansion Is there a new plan offering in your area? If so, reach out to prospects in these markets and encourage them to enroll in an UnitedHealthcare MedicareComplete plan. What's Available? Meeting and non-meeting flyers, direct mail, postcards and posters



Strength and Stability For 20 years, UnitedHealthcare has provided Medicare health plans to people over age 65. Use the company's exercises and dedication to soming our members to help hereficiation in your area choose a health plan from a

Next, select a piece from the available options. You are now ready to customize your flyer using the form fill screen.



Competitor Exits Flyer

meetings



Competitor Exits Mailer, 1-9 meetings

Beginning at the top of the form fill screen, select the desired headline and subheadline if available. If you have selected a piece with variable information, fill in the box as prompted. Please note that if there is only one headline option or no variable information, no fields will appear.

If available, select the benefits you want to promote. Choose by clicking on the boxes to the left of the benefit to select or deselect.



Next, check your agent contact information, again making sure it is formatted correctly.

Note: Depending on the piece, you may have the option to include your photo and logo. If you choose not to display your photo and/or logo, deselect the checkbox next to "Use Agent Photo" and/or "Use Agent Logo". Please note, if you have not uploaded your photo and/or logo you may do so in your Profile.

3 Finish	Update PDF Preview	
	Choose your subhead: O losing your Medicare plan? O over 9 million Medicare members	bosing your Medicare plan?
	Select call out (optional):	
	Pharmacy Saver offers prescriptions for as low as \$2	Discover the benefits of UnitedHealthcare®
	Agent Information:	write you may be concerned about 6 sing your pan, miss a great opportunity to review your health can needs and find a plan that's a better fit for you. Our plans offer easy access to your dectors. A large network of pharmacies for your convenience. And plans that not only treat you when write side hubbaryut are bealthow _ through wellbars concerners and decourse on
	Name	health products.
	Lora Johnson	Call United Healthcare to get more information, reserve your seat at a neighborhood meeting or set up a one-on-one appointment. Jora Johnson
	Phone	(C) 123-456-7890, TTY 711 (G) www.UHCMedicareSolutions.com
	123-456-7890	Contractal, independent hemsedagent as thorized to sell predacts within the UnivedHeathcare® Markeane Solutions portfolio.
	Update PDF Preview	Pharmacy Saver afters prescriptions for as low as \$2 United Healthcare' Itedicare Solutions
		The tenefit information provided bracin is a brief summary, not a comprehensive description of tenefits. For more information contact the plan. If you prefix you can contact United Healthcare® Malitzers Solutions directly for more information or toernoll at 1-1000 805 01977, TTY ATI from \$10 ab 5 pm. Acad united Applications whee Christian Web Site at
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		NEXT STEP

After you have completed all the information on the form fill screen, click the "Update" button located at the bottom of the screen. If any information is incorrect or if a field requiring a value is left blank, the field will be flagged in red.

Editing Steps 1 Form Filling 2 Printing	8 1/2 x 11 UnitedHealthcan Form Filling: Fill out the form to char Preview' to view changes.	e Competitor Exits Flyer
3 Finish	Update PDF Preview	
	Choose your subhead: losing your Medicare plan? over 9 million Medicare members Select call out (optional): Pharmacy Saver offers prescriptions for as low as \$2 Agent Information: Name 	<image/> <section-header><section-header><section-header><section-header></section-header></section-header></section-header></section-header>
	Required	neighborhood meeting or set up a one-on-one appointment.
	123-456-7890	Pharmacy Saver offens prescriptions for as lowas \$2 United Healthcare' Medicate Solutions

Correct the information and click "Update".



When your piece has no errors, click "PDF Preview". A low resolution PDF will appear. Use the PDF to review your piece carefully, making sure there are no spelling or punctuation errors. Remember, this PDF proof is low resolution and not suitable for print. To obtain a print ready PDF, you must continue through the process.



To continue and complete your piece, select "Next Step" on the right top or bottom corner of your screen.

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3 Finish Update PDF Preview	
Choose your subhead:	plan? re
Select call out (optiona Pharmacy Saver offer prescriptions for as low a	al): ^{rs} ^{ss} Discover the benefits of UnitedHealthcare*
Agent Information:	While you may be concerned about b sing your plan, thirs is a great opportunity to review your health can needs and find a plan thar's a there fir for your. Conc plans offer easy acces is to your dectors. A large net work of pharmactes for your convertence. And plans that not only treat you when you're sick, but help you any healthy — through wellness programs and classounts on health products.
Lora Johnson	Call United Healthcare to get more information, reserve your seat at a neighborhood meeting or set up a one-on-one appointment. Lora Johnson
Phone	Image: Contracted, undergread-on location and index of the self products and solution reacom Contracted, undergread-on location and product to self products within the
123-456-7890 Update PDF Preview	UmitedHealthcare ⁴ Malkar Solitons portiolo. Pharmacy Saver offen prescriptions for as lowas \$2 UnitedHealthcare ⁴ Malkare Solitons

Printing or Downloading a Flyer or Direct Mail Piece

After completing the form fill screen of your flyer or direct mail piece, select "Next Step" at the top or bottom right side of your screen. The next screen provides two options for your completed piece --- "Download" or "Order Printed Items".



To download a piece, select "Download" and then "Next Step". You can re-name the description of your piece on this screen by highlighting the name in the description field and entering the new name. Then, select "Add to Shopping Cart".

Home English	nitedHealth RODUCERS [*] Material Other Languages In Progress Archive Profile Suppor	Logout
Editing Steps 1 Form Filling 2 Printing	8 1/2 x 11 UnitedHealthcare Competitor Exits Flyer Finish: Save your work by adding this document to your shopping cart	PREVIOUS ** STAGED CONTENT ** Step 3 of 3
3 Finish	Description: 8 1/2 x 11 UnitedHealthcare Competitor Exits Flyer Product: 8 1/2 x 11 UnitedHealthcare Competitor Exits Flyer ID: D-OVATIONS-10D539AC Add to Shopping Cart Quit Without Saving PDF Preview	
©2010 Brandspring Solution	I Customer Service Index	

When you are at the shopping cart, click "Proceed to Checkout" at the top of the screen.

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Home English M Shopping Cart 🦨	aterial Other Languages	In Progress Archive	Profile Su	pport		Logout
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Review your order and then select "Place Order" at the top or bottom left of the screen. Your piece will now be placed in the "Archive" tab.

🕑 1 Order –	Order: Review and place	your order for production				Step I o
	Please note: Toolkit charge credit card statement as co Cancellation Policy: Orders that have been place	es will be identified on your ming from Brandspring Solut ed can only be cancelled if th	ions who manages the toolkit e job has not been printed. Plea	and transactions. se note, print pro	duction begins	day of or
	within one business day aft We require you to check yo responsibility for the order. given. We cannot issue ref	er your order is placed. ur online proof thoroughly be Once an order is printed as t unds on custom printed produ	fore submitting your order. By p the customer ordered, no return ucts due to customer typos, or or	lacing your order y will be accepted ar missions.	rou assume nd no refund wi	ll be
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After you click "Place Order", you will be directed to your order summary. Your piece is available for download immediately after you place your order. If you have trouble accessing your item, refresh the page to view an active download link.

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r ders () Il of your recent and pa	st order submissic	ons can be found here.			
ew: All Orders	~				
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-OVATIONS-9D467E4A	4/4/2012 2:57 PM	8 1/2 x 11 AARP New to Medicare "Learn More" Ad	\$0.00	𝗭 Completed	Details
-OVATIONS-0EC009A5	4/3/2012 11:51 AM	9 x 6 Low Income Subsidy Postcard	\$0.00	𝗭 Completed	Details
-OVATIONS-9CC409AF	4/2/2012 11:23 AM	VIETNAMESE 8 1/2 x 11 Dual SNP Flyer, with benefits	\$0.00	𝗭 Completed	<u>Details</u>
-OVATIONS-283609A5	4/2/2012 10:15 AM	8 1/2 x 11 Physicians Health Choice Referral Letter	\$0.00	𝗭 Completed	<u>Details</u>
-OVATIONS-9EB0D968	3/30/2012 8:27 AM	8 1/2 x 11 UnitedHealthcare Dual SNP Sales Flyer with ID Card 8 1/2 x 11 UnitedHealthcare Dual SNP Sales Flyer with ID Card 8 1/2 x 11 UnitedHealthcare Dual SNP Sales Flyer with ID Card	\$0.00	𝗭 Completed	Details
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To download your item, click on the item name. Click Open to view the PDF or Save to save the PDF to your computer.

UnitedHealth PRODUCERS^{*}

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To order printed items, select "Next Step" after completing the form fill.

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Editing Steps I Form Filling Printing 	8 1/2 × 11 UnitedHealthcard Form Filling: Fill out the form to chan Preview' to view changes.	e Competitor Exits Flyer ge the document. Click on 'Update' or 'PDF ** STAGED CONTENT ** Step 1 of 3
3 Finish	Update PDF Preview	
	Choose your subhead: losing your Medicare plan? over 9 million Medicare members Select call out (optional): Pharmacy Saver offers prescriptions for as low as \$2 Agent Information: Name 	Josing your Medicare plan? Discover the benefits of UnitedHealthcare* While you may be concerned about boing your plan, this is a great opportunity to review your health care needs and find a plan that's a lener fit for you. Our plansoffer easy access to your decises. A large network of planmates for your convenience. And plans that not only treat you when you're sick, but helpyou is ay healthy — through wellness programs and discounts on health products.
	Lora Johnson Phone	Call UnitedHealthcare to get more information, reserve your seat at a neighborhood meeting or set up a one-on-one appointment. Lora Chapman (1) 123-456-7890, TTY 711 (2) www.UHCMedicareSolutors.com
	123-456-7890	Contracted, independent lecensed agent as thorized to sell prech ets within the United-lealthcare ⁹ Medicare Solutions portfolio.
	Update PDF Preview	UnitedHealthcare

At the next screen select "Order Printed Items", enter any "Special Instructions" and select your quantity using the pull down menu. Then, click "Next Step".

Home English	RODUCERS* Material Other Languages In Progress Archive Profile Supp	ort Logout
Editing Steps 1 Form Filling 2 Printing 3 Finish	8 1/2 x 11 UnitedHealthcare Competitor Exits Flyer Printing: Set printing options Print or Download: O Download Order Printed Items Special Instructions:	PREVIOUS NEXT STEP
	Special instructions here Quantity: 100 200 300 400 500 600 700 800 900 1000	PREVIOUS NEXT STEP

On the following screen, you can re-name the description of your piece by highlighting the name in the description field and entering the new name. Then, select "Add to Shopping Cart".

UHP P	nitedHealth RODUCERS *	
Home English Editing Steps 1 Form Filling 2 Printing 3 Finish	Material Other Languages In Progress Archive Profile Support 8 1/2 x 11 UnitedHealthcare Competitor Exits Flyer Support Finish: Save your work by adding this document to your shopping cart Description: 3 1/2 x 11 UnitedHealthcare Competitor Exits Flyer Product: 8 1/2 x 11 UnitedHealthcare Competitor Exits Flyer	PREVIOUS ** STAGED CONTENT ** Step 3 of 3
	ID: D-OVATIONS-10CB39AE Add to Shopping Cart Quit Without Saving PDF Preview	PREVIOUS

When you are at the shopping cart screen, review your order and costs and click on "Proceed to Checkout".

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Shopping Cart 🧋	i .	• •				
Items to buy now: clic	k 'Proceed to Checkout' to order	r the contents of your shopping c	art			
Apply Discount						
Proceed to Checkout	Continue Shopping		Data			
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Proceed to Checkout	Continue Shopping Description 8 1/2 x 11 UnitedHealthcare Competitor Exits Flyer	Product 8 1/2 x 11 UnitedHealthcare Competitor Exits Flyer	Date Modified 4/4/2012 3:18 PM	Quantity	Options Edit PDF Preview Duplicate Delete Hold	Price \$253.00

After you click "Proceed to Checkout" you will be automatically directed to the shipping step unless you chose the download option. Shipping information populates from your User Profile Address Book. To add or edit your shipping address select the address book icon.

UHP P	RODUCERS [*]
Home English	Material Other Languages In Progress Archive Profile Support
Checkout Steps	Checkout 📷 NEXT STEP
1 Shipping2 Payment	Shipping: Shipping information populates from your User Profile. To add or edit your shipping addresses select the address book icon.
3 Order	Cancel Checkout
	Ship To Lora Johnson Lora Johnson 123 Able St Suite 1000 Eden Prairie, MN 55344
	Notice: We cannot ship to Post Office Boxes. Please make sure you choose a business or residential address above.
	Address Type: Ommercial Residential
	☑ I have verified my shipping address
	NEXT STEP

Select your address using the pull down menu. Click "Edit" to make changes to an existing address or "Add New" to create a new shipping location.

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Home Address B	English Material Other Languages In Progress Archive Profile Support
Edit your add	Jress book
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Complete the fields and click "Accept" to save changes. Click "Back to Shipping Step" when you are finished.

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Next, fill in the payment information and click "Next Step".

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			Handling:	0.00
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	14500 Martin Drive			
	Address 2:			
	Suite 1000			

Review all order information to make sure it is correct. Your total price for any print orders can be found in the bottom right corner of the page. If you are ready to place your order, click "Place Order".

1 Shipping	Order: Review and place ye	our order for production	PREVIOUS			Step 3 o
3 Order	Please note: Toolkit charges will be identified on your credit card statement as coming from Brandspring Solutions who manages the toolkit and transactions. Cancellation Policy: Orders that have been placed can only be cancelled if the job has not been printed. Please note, print production begins day of or within one business day after your order is placed. We require you to check your online proof thoroughly before submitting your order. By placing your order you assume responsibility for the order. Once an order is printed as the customer ordered, no return will be accepted and no refund will be given. We cannot issue refunds on custom printed products due to customer typos, or omissions.					
	Place Order		Cancel Checkout)		
	Item	Description	Product	Date Modified	Quantity	Price
		8 1/2 x 11 UnitedHealthcare Competitor Exits Flyer	8 1/2 x 11 UnitedHealthcare Competitor Exits Flyer	4/4/2012 3:18 PM	500	\$253.00
	D-0VA110N3-10CB39AE				Subtotal Shipping Tax	\$253.00 + \$20.95 + \$19.93
					Total Price	\$293.88

After you click "Place Order", you will be directed to your order summary. Your order will be processed, shipped and will arrive within 10 business days.

Re-ordering a Piece

If you would like to re-order a previously ordered document, click on the "Archive" tab. In the order summary select the "Details" link under the option column.

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	st order submiss	ions can be found here.			
View: All Orders	* Created	Items	Total	Status	Options
G-OVATIONS-9D497E40	4/4/2012 3:26 PM	8 1/2 x 11 UnitedHealthcare Competitor Exits Flyer	\$293.88	In Process	Details
G-OVATIONS-9D3C7E41	4/4/2012 3:14 PM	8 1/2 x 11 UnitedHealthcare Competitor Exits Flyer	\$0.00	In Process	<u>Details</u>
G-OVATIONS-9D467E4A	4/4/2012 2:57 PM	8 1/2 x 11 AARP New to Medicare "Learn More" Ad	\$0.00	Completed	<u>Details</u>
G-OVATIONS-0EC009A5	4/3/2012 11:51 AM	9 x 6 Low Income Subsidy Postcard	\$0.00	𝗭 Completed	Details
G-OVATIONS-9CC409AF	4/2/2012 11:23 AM	VIETNAMESE 8 1/2 x 11 Dual SNP Flyer, with benefits	\$0.00	S Completed	<u>Details</u>
G-OVATIONS-283609A5	4/2/2012 10:15 AM	<u>8 1/2 x 11 Physicians Health Choice Referral</u> Letter 8 1/2 x 11 Citrus Health Care Referral Letter	\$0.00	𝗭 Completed	Details
		8 1/2 x 11 UnitedHealthcare Dual SNP Sales Flyer with ID Card			

In the detail summary click "Reorder". This will add the item to "In Progress" tab

G-OVATIONS-9D3C7 Order summary Go Back Order G-OVATIONS-9D3C7E4	E41 👘							
Order summary Go Back Order G-OVATIONS-9D3C7E4	41. created 4/4/							
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Order G-OVATIONS-9D3C/E-	4), CIERIEC 4/4/	0010 0.14 DM						
	,	2012 3:14 PM						
Shipping Destination Lora 1450	Chapman 10 Martin Drive							
Suite Eden	a 1000 I Prarie, MN 5534	14						
Item D	Description	Product	Quantity	Status	Comments	Options	Destination	Price
						Publication		
8	3 1/2 x 11	8 1/2 x 11			(Submit		
	JnitedHealthcare Competitor Exits Elver	Competitor Exits	1	Process		Reorder	Chapman	\$0.00
	iyer	rije.				Details		
						Download		

From there you can select Edit and return to the form filling step of the ordering process. All information from the previous order will be included.

		ges In Progress Archi	ve Profile S	Support	Logou
Shopping Ca	art 🛒				
Items to buy no	ow: click 'Proceed to Checkout' to o	rder the contents of your shoppi	ng cart		
If you have a di	liscount code, please enter it h	ere:			
Analypias					
Apply Discount					
Proceed to Check	kout Continue Shopping				
Proceed to Check	kout Continue Shopping		Date		
Proceed to Check	Continue Shopping Description	Product	Date Modified	Quantity	Options Price
Proceed to Check	Kout Continue Shopping Description	Product	Date Modified	Quantity	Options Price
Proceed to Check	Continue Shopping	Product	Date Modified	Quantity	Options Price
Proceed to Check	Baseline Baseline 8 1/2 x 11 UnitedHealthca Competitor Exits Flyer	Product re 8 1/2 x 11 UnitedHealthc Competitor Exits Flyer	Date Modified are 4/4/2012 3:27 PM	Quantity	Options Price
Proceed to Check	Backwort Continue Shopping Description 8 1/2 × 11 UnitedHealthca Competitor Exits Flyer	Product re 8 1/2 x 11 UnitedHealthc Competitor Exits Flyer	Date Modified are 4/4/2012 3:27 PM	Quantity	Options Price Edit PDF Preview Duplicate Delete Hold

Complete or update the fields and select "Update". Once you have completed the form fill step continue through the order process.



Support

If you have questions about using the Agent Toolkit, building a piece, material availability or would like to make a suggestion for improvement or site enhancements click on the "Support" tab on the top right side of the page. You will find customer service contact information along with other resource links.



Toolkit customer service is available Monday-Friday 8am to 5pm central standard time at

customerservice@uhcagenttoolkit.com or toll free at 1-877-249-5419. For further instruction please reference the Demo and/or Frequently Asked Questions.

UnitedHealth		<u> </u>
UIII PRODUCER	S″	
Home English Material Other Languages In Prog	ress Archive Profile Support	-
Toolkit Customer Support		
Toolkit Customer Support		
Contact Toolkit customer service if you need help pavingting the	website or customizing your marketing material	
Email: customerservice@uhcagenttoolkit.com	record or concomining your manceing material.	
Toll Free: 1-877-249-5419		
Toolkit User Feedback <u>Click Here</u> to provide feedback about this website. We will take y to this site and our material.	our comments into consideration as we continue to make improvements	
Still don't see what you need? Complete and submit the <u>Agent Marketing Exception Request Fon</u> created for review.	$\underline{\mathrm{m}}$ to request custom use of a logo or submit a marketing piece you have	
Agent Toolkit Cancellation Policy Orders that have been placed can only be cancelled if the job ha one business day after your order is placed.	s not been printed. Please note, print production begins day of or within	
We require you to check your online proof thoroughly before subr order. Once an order is printed as the customer ordered, no retur on custom printed products due to customer typos, or omissions.	nitting your order. By placing your order you assume responsibility for the m will be accepted and no refund will be given. We cannot issue refunds	
and the second of the second second second		
Toolkit Training Material		
Quick Start Guide		
Click here to download the printable Quick Start Guide.		
Online Tutorial		
Click on Complete Online Tutorial below to access an online demo	nstration of how you can use the UnitedHealthcare Agent Toolkit to	
create customized marketing collateral. Or click on one of the link	is below for a quick 2 to 3 minute highlight of a specific activity.	
Complete Online Tutorial		
Section 1: <u>Introduction to the UnitedHealthcare Agent Toolkit</u> Section 2: Signing on to the UHC Agent Toolkit	Section 7: <u>How to create an Ad</u> Section 8: How to submit an ad to a publication	
Section 3: <u>Finding your way around the UHC Agent Toolkit</u> Section 4: Changing your profile	Section 9: How to create a flyer, postcard or directmail piece Section 10: Download or print a completed piece	
Section 5: In Progress Material Section 6: Accessing completed Orders	Section 11: <u>Reordering a completed piece</u> Section 12: <u>Support</u>	
Click on <u>Downloadable Online Tutorial</u> to download a copy of the take a long time due to the size of the file.	complete tutorial to your desktop. Note: the downloading process may	
Frequently Asked Questions		
When I access the UHC Agent Toolkit I do not see all of the mark		
When I am creating a piece on the Toolkit I cannot select a state	e in the Plan Benefit pull down.	
L followed the correct steps to access the UHC Agent Toolkit but do?	still do not see all of the material I am certified to use. What should I	
My colleague has access to more/different material than I do, ca	n I be given access to this material?	
I am looking for pre-enrollment kits and sales supplies, where sho	uld I go?	
I need marketing materials that I can print from my desktop print	er or at my local printer, however this PDF says PROOF across it.	
I am trying to save my document to my shopping cart, however t	the Toolkit is telling me there are errors.	
What is the difference between downloading versus printing a pie	ce?	
I ordered a downloadable PDF through the Toolkit and it has not	been sent to me.	