UnitedHealthcare®
Medicare Solutions

Product Information & Materials Tab
Sales Material ~ Order Fulfillment
"How To" Guide

Are you interested in ordering sales and other materials but don't know where to look?

This guide will walk your through the **Product Information & Materials** tab in the Distribution Portal and show you two simple methods for ordering materials, the ***Direct Method*** and the ***Plan Search Method***. This tab makes ordering easy!

(This is not the same as the Agent Toolkit where you order customized,
approved marketing materials with targeted messages.)

Begin by logging into the Distribution Portal at:
www.UnitedHealthProducers.com   or   www.UnitedHealthAdvisors.com

Then follow the steps in the sections below:

Distribution Portal Sign-In

- Sign in to the Distribution Portal at:

  www.UnitedHealthProducers.com
  or
  www.UnitedHealthAdvisors.com

- Select **Agent ID** (only agents accessing with an 'Agent ID' will be able to order materials)

- Enter your Username and password

- Click **Go**

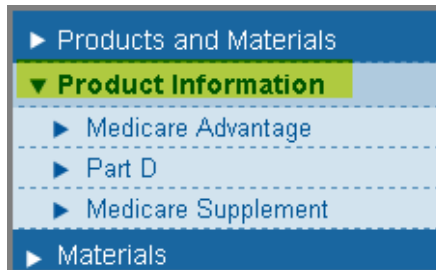# Product Information & Materials Tab

- Click on the **Product Information & Materials** tab

- Click **Product Information** to select product materials

  Or

- Click **Materials** to find sales materials, order history or your shopping cart

Confidential property of UnitedHealth Group. For Agent use only. Not intended for use as marketing material for the general public.

8.14.11   Do not distribute, reproduce, edit or delete any portion without the express permission of UnitedHealth Group.   Page 2 of 10

Plan Search Method (Product Information Section)

- Click **Product Information**

- Click on desired product; for our example we'll click **Medicare Advantage**

  Note: Notice that of the 3 product categories that display, only Medicare Advantage and Part D are available through the Plan Search Method. To order Medicare Supplement materials, use the Direct Method shown later in this course.

- Click on **Plan Search**

▶ Products and Materials
▼ **Product Information**
  ▼ Medicare Advantage
    HMO and PPO
    PFFS
    Special Needs Plans (SNPs)
    Plan Search
    Provider Search
    Drug Search
    Pharmacy Search
  ▶ Part D
  ▶ Medicare Supplement
▶ Materials

- Click the **Plan year** drop-down arrow and select the year

- Click the **State** drop-down arrow and select the state

- Click the **County** drop-down arrow and select the county (if applicable)

- Click **Search**

Plan Search

This site provides visibility to all plans and product materials offered by UnitedHealthcare Medicare Solutions, to ensure the best options are available to Medicare beneficiaries. There are plans and materials available in some areas that are non-commissionable for agents. For additional information on non-commissionable areas, please refer to your agent contract or click here.

Plan search allows you to explore all available plans. Please select the plan year. Select the state or zip code of your search, and select the county. Click on the search button

Select Plan year
2011

Select a State   **Enter Zip code**
ALABAMA   OR

County
AUTAUGA

Search

The plans available for that county/state will appear. For our example, we'll order materials for the first plan listed.

- Click **Plan Materials** to begin your order

Plans for County AUTAUGA, State ALABAMA

To view more details for any plan, click the plan name.
To download or order materials, Click the **Plan materials** button.

AARP MedicareComplete (HMO)
H0151-001

Medical Benefits

Monthly Premium	Annual Deductible	Annual Out of Pocket Limit	Network of Doctors/Hospitals	Nationwide Coverage	Optional Coverage Available
$0.00	$0.00	$3950.00	Plan Doctors Only	No	Dental

Rx Benefits

Monthly Premium	Annual Deductible	Coverage Gap Level	Tier 1	Tier 2	Tier 3	Specialty
$0.00	$0.00	No	$5.00	$45.00	$85.00	33%

PLAN MATERIALS

Confidential property of UnitedHealth Group. For Agent use only. Not intended for use as marketing material for the general public.

8.14.11   Do not distribute, reproduce, edit or delete any portion without the express permission of UnitedHealth Group.   Page 3 of 10

- Type in the quantity you want in the **Order Qty** field

- Click **Add to Cart**

- Click **View Cart** to see your materials

Note: Only items with a box in the "Order Qty" field are available for order. If the item does not have a box, the material cannot be ordered but is available via download.

Direct Method (Materials Section)

The Direct Method of ordering materials allows you to bypass Plan Search to locate the Sales Materials you need. In this area you'll find a wide variety of sales, marketing and retail materials to support your business needs (i.e., kits, sales detailers, benefit guides, plan formularies and other briefcase items). *Note: Medicare Supplement materials can only be ordered using this Direct Method.*

You must be logged on to the Distribution Portal.

- Click **Materials**

- Click **Sales Materials**

Decide if you want to search by location or by item number. For our example, we'll search by location.

- Click the **Plan year** drop-down arrow and select the year
- Click the **State** drop-down arrow and select the state
- Click the **County** drop-down arrow and select the county (applicable only for Medicare Advantage)
- Click **Search**

The plans available for that county/state will appear. For our example, we'll order materials for the first plan listed.

- Click **Plan Materials** to begin your order

Plans for County AUTAUGA, State ALABAMA

To view more details for any plan, click the plan under the plan name.
To download or order materials, Click the **Plan materials** button.

AARP MedicareComplete (HMO)
H0151-001

Medical Benefits

Monthly Premium	Annual Deductible	Annual Out of Pocket Limit	Network of Doctors/Hospitals	Nationwide Coverage	Optional Coverage Available
$0.00	$0.00	$3950.00	Plan Doctors Only	No	Dental

Rx Benefits

Monthly Premium	Annual Deductible	Coverage Gap Level	Initial Coverage Co-pays			
			Tier 1	Tier 2	Tier 3	Specialty
$0.00	$0.00	No	$5.00	$45.00	$85.00	33%

PLAN MATERIALS

- Type in the quantity you want in the **Order Qty** field

- Click **Add to Cart**

- Click **View Cart** to see your materials

Note: Only items with a box in the "Order Qty" field are available for order. If the item does not have a box, the material cannot be ordered but is available via download.

AARP MedicareComplete (HMO)
H0151-001

Directory

Description	Item #	Download	Order Qty
2011 Provider Directory H0151-001	AAAL11HM3243862_004	📕	
2011 Spanish Provider Directory H0151-001	AAAL11HM3244755_004	📕	

Evidence of Coverage

Description	Item #	Download	Order Qty
2011 EOC H0151-001	AAAL11HM3244334_002	📕	

Formulary

Description	Item #	Download	Order Qty
2011 Comprehensive Formulary H0151-001	AAEX11HM3251364_001	📕	

Kit

Description	Item #	Download	Order Qty
2011 Enrollment Kit (Includes App. and SB) H0151-001	AAAL11HM3242023_000	📕	

ADD TO CART

BACK TO AVAILABLE PLANS

View Cart
Materials: 0

BACK TO SALES MATERIALS

Shopping Cart and Order Summary

From the Cart you can:

- Update quantities

- Remove items

- Clear the cart

- Add more items

- Proceed to checkout

Cart

Step 1 of 3 of ordering process

Total Order Items: 2

Medicare Advantage

Type	Description	Item #	Order Qty	
Kit	2011 Enrollment Kit (Includes App. and SB) H0151-001	AAAL11HM3242023_000	3	REMOVE
Directory	2011 Provider Directory H0151-001	AAAL11HM3243862_004	4	REMOVE

CLEAR SHOPPING CART   ADD MORE ITEMS   PROCEED TO CHECKOUT

In Checkout,

- Click in the **check box** to populate the Sales Agent ID on enrollment forms (if it appears)

- Complete the **Ship To** section; fields with a red * are required

- Click **Submit Order**

Checkout

Step 2 of 3 of ordering process

You are now ready to checkout. Please review the information below for accuracy, then submit your order.

Ship To:

☐ Check here to populate Sales Agent ID on enrollment forms included with my requested Part D pre-enrollment kits.

* Required

Sales Agent ID:	12345		
First Name:*	Joe	Last Name:*	Broker
Company Name:	UnitedHealthcare		

Address1:*	Address2:	City:*	State:*	Zip Code:*
5959 Plaza Drive		Birmingham	AL	35203

Phone Number: * 555 - 123 - 4567

CANCEL AND RETURN TO CART   SUBMIT ORDER

You will receive an order confirmation number. Notice the confirmation lists the number of items you have ordered.

- Click **Print this page** if you want your order confirmation printed

BACK TO SALES MATERIALS   🖨 Print this page

Order Confirmation

🛒 View Cart
Materials: 0

Step 3 of 3 of ordering process

Thank you for your order.

Your order# is

146525

Submitted: 07/22/2011 16:19:37

Shipping

Name:	Joe Broker
Company :	UnitedHealthcare
Address :	5959 Plaza Drive, Birmingham, AL, 35203
Phone:	555-123-4567

Order Summary

Total Order Items: 2

Medicare Advantage

Type	Description	Item #	Order Qty
Kit	2011 Enrollment Kit (Includes App. and SB) H0151-001	AAAL11HM3242023_000	3
Directory	2011 Provider Directory H0151-001	AAAL11HM3243862_004	4

If you want to review all of your order history,

- Click the **Order History** from the main Materials menu

▶ Products and Materials
▶ Product Information
▼ **Materials**
    Sales Materials
    Order History
    Shopping Cart

- You will receive your order approximately seven to ten business days from the day it is submitted.

- Shipment of orders will be fulfilled through DHL or standard UPS (includes tracking numbers).

- Please access the UPS site www.ups.com for the status of your shipment.

- Orders without tracking numbers are shipped through DHL.

Order Submitted Date

Start Date:* 06/22/2011

End Date:* 07/22/2011

Submit ➡

Please note: upon initial entry into this page, below are your most recent orders.
If you do not see the order you are looking for below, please enter, in the fields above, a date range (30 days or less) of when the order was placed and click submit.

Medicare Advantage

Displaying values 1 to 2 of 2

Submitted	Order #	Description	Qty	Status	Tracking #	
07/22/2011	146525	2011 Enrollment Kit (Includes App. and SB) H0151-001	3	Submitted		REORDER
07/22/2011	146525	2011 Provider Directory H0151-001	4	Submitted		REORDER

Displaying values 1 to 2 of 2

Other Search Engines

You can also search by Provider, Drugs and Pharmacy.

Provider Search

- Click **Product Information**

- Click on desired product; for our example we'll click **Medicare Advantage**

- Click on **Provider Search**

Note: This search method opens a new browser window.

- Select the way you want to search: by Physician, Facility or Group

- Enter **Zip Code**

- Click **Continue**

- Complete the remaining screens as they appear

Drug Search

- Click **Product Information**

- Click on desired product; for our example we'll click **Medicare Advantage**

- Click on **Drug Search**

▶ Products and Materials
▼ **Product Information**
  ▼ Medicare Advantage
    HMO and PPO
    PFFS
    Special Needs Plans (SNPs)
    Plan Search
    Provider Search
    Drug Search
    Pharmacy Search
  ▶ Part D
  ▶ Medicare Supplement
▶ Materials
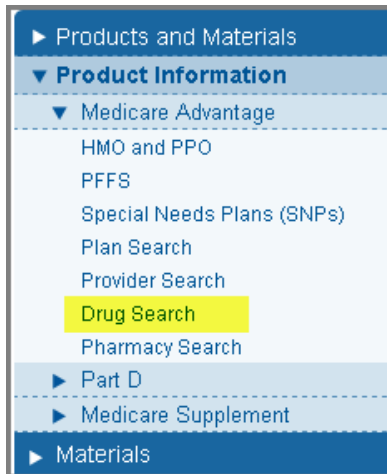
- Click on the drop down arrow for year and select the **plan year**

- Enter **Zip code**

- Click **Submit**

- Complete the remaining screens as they appear

Note: The steps for this search process are indicated across the top of the screen beginning with step #1 – Get Started.

Look Up Prescription Drugs

Use this tool to estimate your drug costs based on the drugs you take.

| **1** Get Started | **2** Enter Drugs | **3** Select Generics | **4** Enter Drug Details | **5** View Drug Costs |

You'll need your prescription information, dosage and frequency.

Please select the plan year:
2011

Enter your ZIP code:

submit ▶

Look up ZIP code

Pharmacy Search

- Click **Product Information**

- Click on desired product; for our example we'll click **Medicare Advantage**

- Click on **Pharmacy Search**

▶ Products and Materials
▼ **Product Information**
  ▼ Medicare Advantage
    HMO and PPO
    PFFS
    Special Needs Plans (SNPs)
    Plan Search
    Provider Search
    Drug Search
    Pharmacy Search
  ▶ Part D
  ▶ Medicare Supplement
▶ Materials

- Complete **City and State** or **Zip Code** fields

- Select **All Types** or select specific **Services**

- Click **Search**

- A list of pharmacies will appear

Locate a Pharmacy

We have contracted with over 60,000 pharmacies nationwide, including:

• Brooks/Eckerd	• Safeway
• CVS Pharmacy	• Sam's Club
• Kmart	• Target Pharmacy
• Kroger	• Walgreens
• Longs Drugs	• Wal-Mart
• Rite Aid	**Plus many more!**

Your client can enjoy the convenience, service and savings as a plan member by using the Preferred Mail Service Pharmacy through Prescription Solutions.

Use our online directory to locate a pharmacy now.

Tell us where to look for a pharmacy. More information will help us to provide better results.

* Required field

Address:
City:*
State:* ALABAMA
or
ZIP Code:* 35203
Show results within 2 miles

⦿ Show Pharmacies for All Types
○ Show Pharmacies for these Services ❓

☐ Retail
☐ Open 24 hours
☐ Indian / Tribes / Urban
☐ Home Infusion and Specialty
☐ Long-term Care
☐ Retail 90-day
☐ Mail order

Search 🔍