



UnitedHealthcare Agent Materials Portal Users Guide

Version 5.4

6/30/2016

Welcome to the UnitedHealthcare Agent Materials Portal. This guide will help you locate, download and place orders for sales materials.

If you have questions that are not answered by this guide please contact the Producer Help Desk (PHD):

phd@uhc.com

888.381.8581

Table of Contents

UnitedHealthcare Materials Portal – Logging in.....	2
Welcome Screen.....	3
The Products Menu.....	4
Search Results.....	6
Advanced Search.....	7
Item Details Screen.....	8
Shopping Cart.....	9
Order Confirmation Screen.....	14
Account Dashboard Screen.....	15
Account Information Screen.....	17
My Orders Screen.....	17
Order Details Screen.....	19
Address Book.....	21
Tracking Your Orders.....	22
Personalization of Kits/Enrollment Guides.....	23
Downloading PDF's.....	26

UnitedHealthcare Materials Portal – Logging in

To order or download materials, enter the Agent Materials Portal (UHP-www.unitedhealthproducers.com or UHA-www.unitedhealthadvisors.com) using your current agent writing ID and password and click on the Product Information & Materials Tab. Once on the Product Information & Materials Tab, please select the Sales Materials tab (shown below).

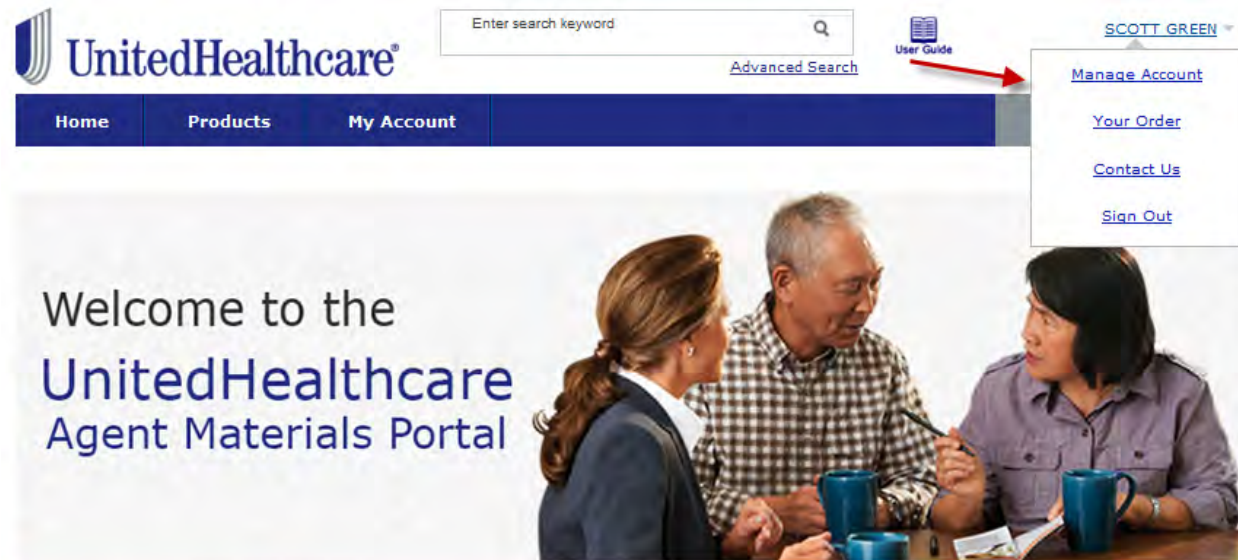
From here you will see a link (shown below) that will directly connect you to the Agent Materials Portal ordering site. No additional log in or password is needed.

The screenshot shows the UnitedHealthcare Materials Portal interface. At the top, there is a navigation bar with the UHP logo and links for Sign Out, Home, Contact Us, and Service Request. Below this is a secondary navigation bar with icons for Learning Center, Product Information & Materials, Electronic Enrollment, Applications & Enrollments, Commission Status, Manage Your Account, and Resource Center. The main content area is titled 'Product Information & Materials' and contains four tabs: Product Information, Sales Materials (selected), Authorized to Offer, and Agent Toolkit. A red arrow points to the Sales Materials tab. Below the tabs, the 'Sales Materials' section is displayed, featuring a link 'Click here for the Agent Materials Portal' which is circled in red. To the left of the main content, there is a sidebar with sections for Resources (Agent Toolkit), Top Documents, Links & Contacts, Quick Links (Training & Certification, Sales Materials), and Applications & Enrollments. The main content area also contains text explaining that all agent materials are ordered through the Agent Materials Portal and provides instructions on how to use the new ordering system.

Welcome Screen

This Welcome Screen is where you will be taken when you click the link from the Agent Materials Portal. From here you have a variety of options that can be done including: search for and order materials, download PDF's, and check out your account profile.

Clicking the Home button or logo will always take you back to this welcome screen. At the bottom you will see the items that you ordered previously. These can be used as quick links to add these same items back into your shopping cart. There is always a menu in the upper right corner for quick access to sign out, manage your account or view orders.



© 2014 United Health Group. All Rights Reserved Legal: The content of this site is private and only for use by approved brokers and Agents of United Health Group.

The Products Menu

This menu gives you quick shortcuts to search for all materials available on the Agent Materials Portal within a plan year and plan type. Note that only plan years that are available in the system will be shown. Clicking the Products button directly will return all materials for which you are licensed, appointed and certified to sell.

The screenshot displays the UnitedHealthcare Agent Materials Portal. At the top, there is a search bar with the text "Enter search keyword" and a magnifying glass icon. To the right of the search bar is a "User Guide" link. Below the search bar is a navigation bar with "Home", "Products" (circled in red), and "My Account" buttons. A shopping cart icon labeled "MY CART (1)" is visible on the right side of the navigation bar. The main content area is titled "Kit" and shows a grid of four enrollment materials. Each material has a purple header "Enrollment Materials", a thumbnail image of two people walking, and text describing the material: "AARP Medicare Supplement Alabama Enrollment Kit for Apr 1, 2016 - Dec 1, 2016 effective dates.", "AARP Medicare Supplement Alaska Enrollment Kit for Apr 1, 2016 - Dec 1, 2016 effective dates.", "AARP Medicare Supplement Arkansas Enrollment Kit for Apr 1, 2016 - Dec 1, 2016 effective dates.", and "AARP Medicare Supplement Arizona Enrollment Kit for Apr 1, 2016 - Dec 1, 2016 effective dates.". Each material has "Add To Cart" and "Download" buttons. On the left side of the main content area, there is a "Shop By" section with a red arrow pointing to the "States" dropdown menu. The "Shop By" section includes filters for "States", "Plan Years", "Plan Type", "Language", and "Doc Type", each with a "-- Select Option --" dropdown. A note above the "States" filter reads: "Not all Medicare Advantage plans are available in all countries in all states." The top of the main content area shows "View as:" with grid and list icons, "Items 1-12 of 6556", "Page: 1 2 3 4 5", and "Show 12 per page".

An alternate list view of materials is available by clicking the List view:

Shop By
Not all Medicare Advantage plans are available in all counties in all states.

States
-- Select Option --

Plan Years
-- Select Option --

Plan Type

View as: **List**

Items 1-12 of 6556 Page: 1 2 3 4 5 Show 12 per page

Kit	
 AARP Medicare Supplement Alabama Enrollment Kit for Apr 1, 2016 - Dec 1, 2016 effective dates.	 AARP Medicare Supplement Alaska Enrollment Kit for Apr 1, 2016 - Dec 1, 2016 effective dates.
Add To Cart	Add To Cart

Shop By
Not all Medicare Advantage plans are available in all counties in all states.

States
-- Select Option --

Plan Years
-- Select Option --

Plan Type

View as:

Items 1-50 of 6556 Page: 1 2 3 4 5 Show 50 per page

Kit	
AARP Medicare Supplement Alabama Enrollment Kit for Apr 1, 2016 - Dec 1, 2016 effective dates.	Add To Cart Download
AARP Medicare Supplement Alaska Enrollment Kit for Apr 1, 2016 - Dec 1, 2016 effective dates.	Add To Cart Download
AARP Medicare Supplement Arkansas Enrollment Kit for Apr 1, 2016 - Dec 1, 2016 effective dates.	Add To Cart Download
AARP Medicare Supplement Arizona Enrollment Kit for Apr 1, 2016 - Dec 1, 2016 effective dates.	Add To Cart Download

Search Results

This is the search results screen. Items will be listed based on the filter criteria you chose from the Products menu. On the left under the words ‘**Shop By**’ are a set of filter settings you can use to further filter your items to the exact item you wish to order or view. Not all filters are needed for all searches, so filter selection option will show as appropriate. Depending on your search, may see filter selections for:

- Plan Years,
- Plan Type,
- States,
- Counties,
- Language,
- Contract-PBP Code,
- Doc Type.

The screenshot shows the UnitedHealthcare search results interface. At the top, there is a search bar with the text "Enter search keyword" and a magnifying glass icon. Below the search bar is a navigation menu with "Home", "Products", "My Account", and "MY CART (0)". The main content area displays search results for "Kit", showing 12 items. The first item is "AARP Membership Form" with a "Download" button. The second item is "AARP Medicare Supplement Minnesota Enrollment Kit for Jan 1, 2015 - Dec 1, 2015 effective dates" with a "Download" button. The third item is "AARP Med Supp Enrollment Kit Part 2 - 2015 Choosing A Medigap Policy - Present With The AARP Medicare Supplement Enrollment Kit Part 1. (Available for order for a limited time only)" with "Add To Cart" and "Download" buttons. The left sidebar contains a "Shop By" section with filters for "Plan Type" (AEP - 2015 - MS) and "States" (Minnesota). The right side of the page has callout boxes with descriptions and buttons for "Description Verbiage", "Add To Cart", and "Download".

A brief description of the item is within each box on the right. Clicking the Description verbiage within any box will take you to a more detailed description screen. Clicking ADD TO CART will add the item to your shopping cart.

Advanced Search

Click the Advanced Search link just below the search box at the top of the screen. This screen allows you to enter in exact criteria for your search.

The screenshot displays the UnitedHealthcare website's search interface. At the top, there is a search bar with the text "Enter search keyword" and a magnifying glass icon. Below the search bar, the "Advanced Search" link is highlighted with a red box. The navigation bar includes links for "Home", "Products", and "My Account", along with a "MY CART (0)" icon. Below the navigation bar, the "Catalog Advanced Search" section is visible. The "Search Settings" form includes the following fields:

- Plan Years: --Please Select-- (dropdown menu)
- Plan Type: All (dropdown menu)
- States: All (dropdown menu)
- Counties: All (dropdown menu)
- Language: All (dropdown menu)
- Contract-PBP Code: All (dropdown menu)
- Kit Code: (text input field)

A "SEARCH" button is located at the bottom right of the form. Below the form, there is a note: "CTRL click to select or deselect items from the multiselect dropdowns."

Item Details Screen

Click on plan name for a full description of the material, or select 'Download' or 'Add to Cart'.

Home Products My Account

Shop
Not all Medicare Advantage plans are available in all states.

Page: 1 2 3 4 5

Kit

Enrollment Materials

AARP Medicare Supplement Alabama Enrollment Kit for Apr 1, 2015 - Dec 1, 2015 effective dates.

Enrollment Materials

AARP Medicare Supplement Arkansas Enrollment Kit for Apr 1, 2015 - Dec 1, 2015 effective dates.

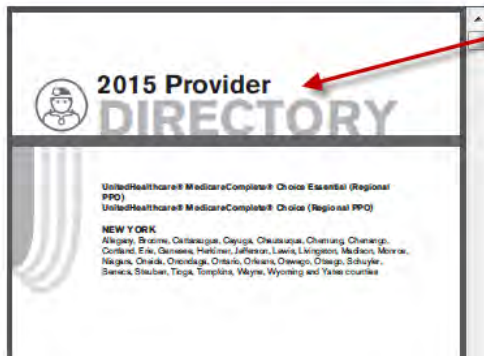
Click here for plan details.

Click here to either Download or Order material.

Add To Cart

Download

This screen shows more details for the item you are ordering. There are two tabs (Description and Additional Information) that you can click on to see all of the descriptive information available.

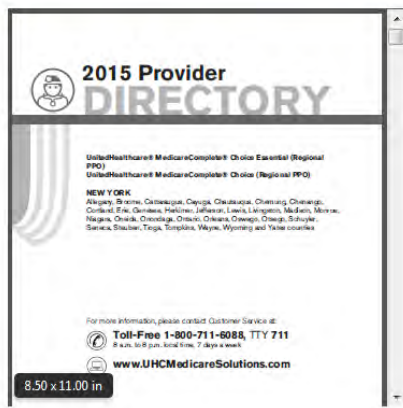


2015 English MA Full Provider Directory R5342-002

Download

Description Additional Information

2015 English MA Full Provider Directory R5342-002



2015 English MA Full Provider Directory R5342-002

Download

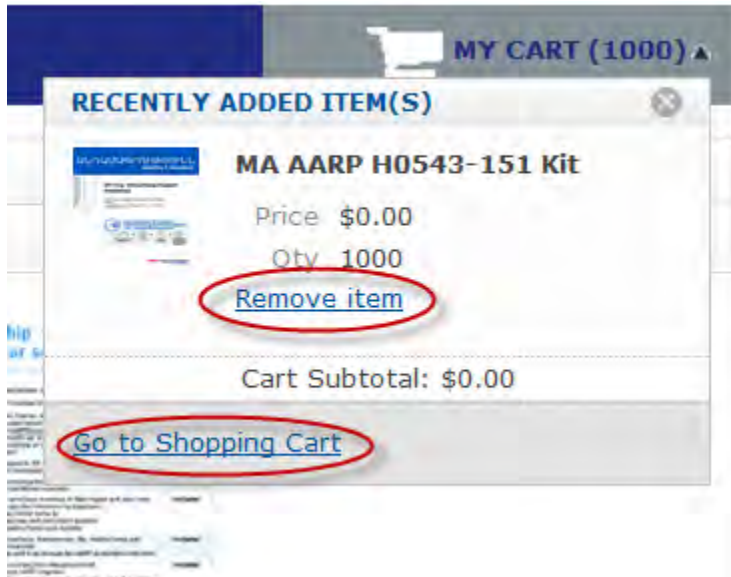
Description Additional Information

Doc Type	Directory
PBP#	002
H#	R5342
Product Type	MA
Year	2015
Brand	UnitedHealthcare
Kit Code	UHNY15RP3588450_000

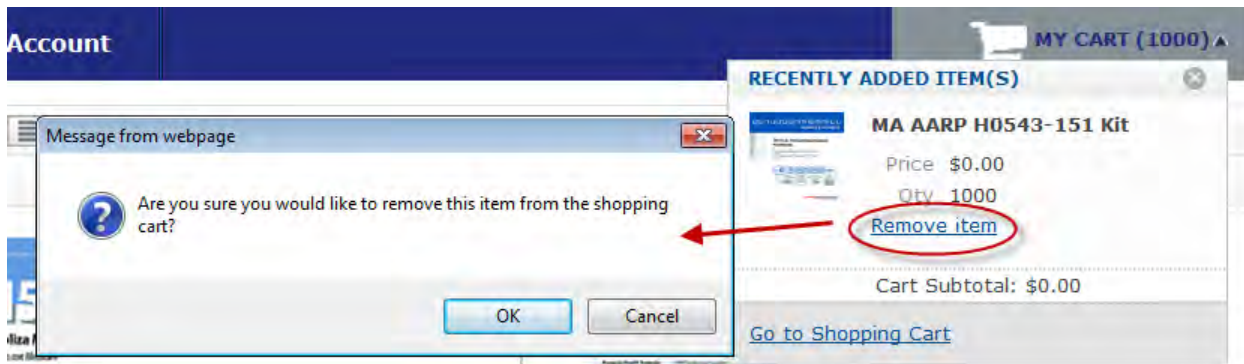
Shopping Cart

In the upper right hand corner of the toolbar is a quick link to your Shopping Cart. This dropdown opens up when you click on the 'My Cart' button. From here you will see 'Recently Added Items' and have the options to individually 'Remove Item' or 'Go to Shopping Cart'.

Selecting 'Go to Shopping Cart' will bring you to a screen to review the entire order, with the ability to update order quantities, delete any of the recently added items, 'Continue Shopping', or 'Proceed to Checkout'.



Selecting **'Remove Item'** will result in a pop-up screen prompting you to confirm you want to delete that item.



If you select **'Go to Shopping Cart'**, you will be able to review and modify your order.

Home Products My Account MY CART (1)

Shopping Cart

[Proceed To Checkout](#)

CHECK ALL ITEMS	QUANTITY	QUANTITY REQUESTED	TOTAL REQUESTED
<p>SKU: 2015081006493170 Description: 2015 English Enrollment Guide: AARP MedicareComplete SecureHorizons (HMO) H0543-019</p>	1	<input type="text" value="1"/> Must Click to Update	1

[Delete All Checked](#) Total 1 Orders

To update your quantity, proceed to your cart. I have confirmed my order totals and understand that I cannot change my order after I check out

[Continue Shopping](#) [Proceed To Checkout](#)

Need to ensure on this step that you have the correct quantity indicated for your order. One (1) equals one (1) piece unless otherwise indicated. To edit your quantity, you must change the number value and then click on **Must Click to Update**. If this step is not done, the change in quantity will not take place. If the quantity you have selected exceeds your order limit, enter a brief explanation on why your order exceeds the limit in the customer order comment field. Your order will be placed on hold until it is reviewed by a Regional approver. Orders placed on hold will be reviewed within 1-2 business days. Once your order has been reviewed, you will be notified via an e-mail notification of the order status.

Home Products My Account MY CART (1000)

Shopping Cart

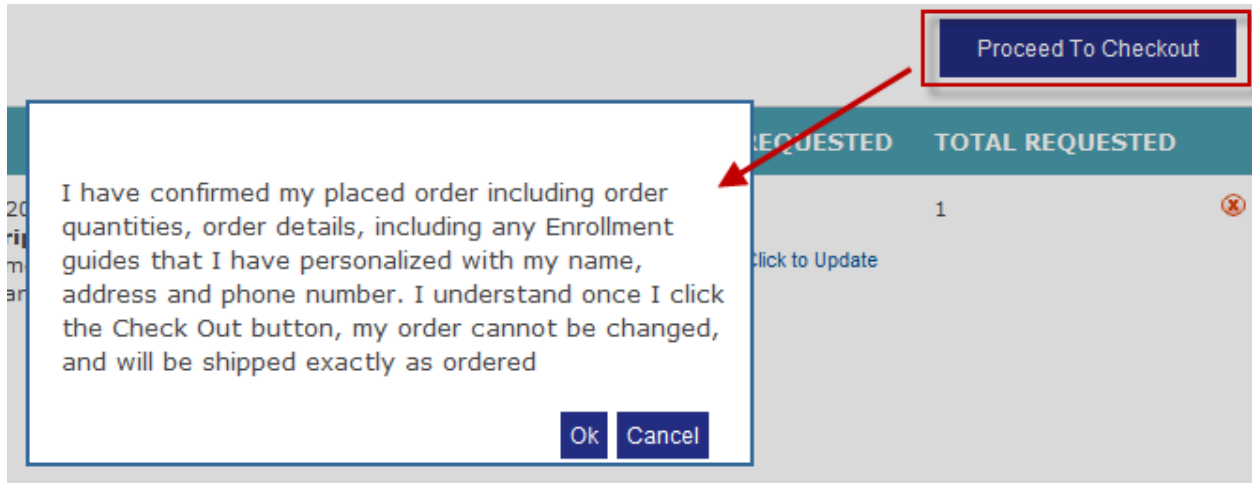
[Proceed To Checkout](#)

This order is over the limit for your role - **SKU:** 2015080716153158
Order Limit: 25, Quantity requested to date, including this order 1000, **Available Quantity:** 25

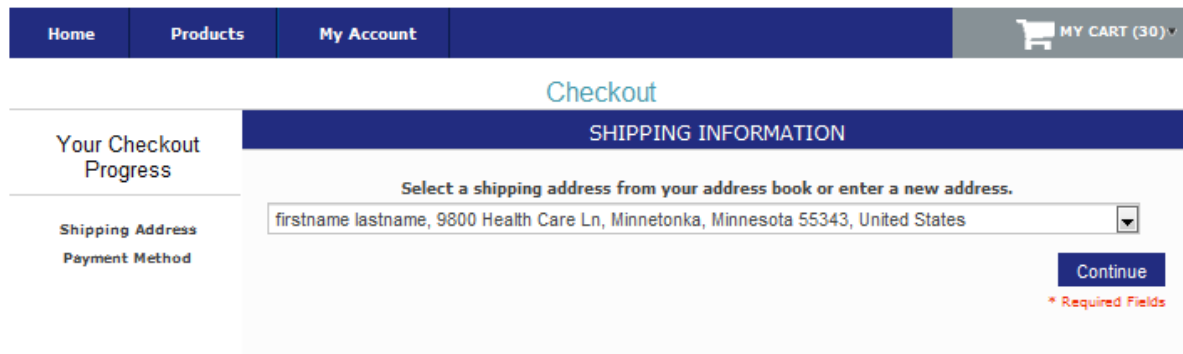
Please edit your order to reduce the quantity ordered to be at or below your limit. If you wish to request approval to order more than your order limit allows, please proceed to check out and your order will be placed on hold until an approver approves, denies, or modifies your order.

CHECK ALL ITEMS	QUANTITY	QUANTITY REQUESTED	TOTAL REQUESTED
<p>SKU: 2015080716153158 Description: 2015 English Enrollment Guide: AARP MedicareComplete (HMO) H0303-015</p>	1	<input type="text" value="1000"/> Must Click to Update	1000

The CONTINUE SHOPPING button will take you back to the welcome screen, where you can perform a new search. If you are ready to check out, check the box in the lower left to confirm your understanding that orders cannot be changed once you check out. Then click the PROCEED TO CHECKOUT button, which will take you to the checkout screens. You will again be prompted to confirm your order detail.



After selecting OK, you will be prompted to accept the default address that you are contracted under or one that you have previously entered. You will also be able to enter a new address at this time.. Please be sure that you verify any saved addresses before selecting one. This is extremely important as orders will NOT be shipped to incorrect addresses:



Checkout

SHIPPING INFORMATION

Select a shipping address from your address book or enter a new address.

Shipping Address
Payment Method

firstname lastname, 9800 Health Care Ln, Minnetonka, Minnesota 55343, United States
 firstname lastname, 9800 Health Care Ln, Minnetonka, Minnesota 55343, United States
 firstname lastname, 9800 Health Care Ln, Minnetonka, Minnesota 55343, United States
 New Address

Address Verification

To ensure that placed orders arrive to their destination, the Agent Materials Portal will verify the address for each order that is placed. This verification is done on the address attached to your order that has been placed.. If an address change is needed based on the address verification process, you will be prompted to choose the correct address for the order. You must select the **Select Suggested Address** at this point. If this is not done, your order will be cancelled and not shipped. No re-orders can be done unless a correct address is used when placing the order in the Agent Materials Portal.

Shipping Address Verification

The address provided is NOT a valid address per the US Postal Service database. Address needs to be corrected or select the Revised Address to ensure delivery of order and prevent the order from being cancelled!

YOU ENTERED:		WE FOUND:	
Address:	9800 Health Care Ln	Address:	9800 Health Care Ln
City:	Minnetonka	City:	Minnetonka
State:	Minnesota	State:	Minnesota
Zip Code:	55342	Zip Code:	55343
<input type="button" value="Keep This Address"/> <input type="button" value="Edit This Address"/>		<input type="button" value="Select Suggested Address"/>	

After confirming Address, you will review your order and may add any comments. Comments may be useful to justify orders in excess of your volume limits.

Your Checkout Progress

Shipping Address | [change](#)

firstname lastname
9800 Health Care Ln
Minnetonka, Minnesota,
55343
United States
T: 555-555-5555

Payment Method | [change](#)

No Payment Information Required

SHIPPING INFORMATION			
PAYMENT INFORMATION			
ORDER REVIEW			
PRODUCT NAME	PRICE	QTY	SUBTOTAL
2015 English Enrollment Guide: AARP MedicareComplete (HMO) H0303-015	\$0.00	1000	\$0.00

Customer Order Comment In this area, I can provide comments or justification for the Approver to consider.

.Order Confirmation Screen

Once you click the PLACE ORDER button, an Order Confirmation Screen will appear. The screen will show you your order number and will provide a link to print the confirmation of your order. Your order number is important to keep as it will link back to what items were placed on this order. As your order is processed, you will receive status update emails letting you know the status of each order that is placed..

Your Checkout Progress

Shipping Address | [change](#)

Monday House
111 New Street
Ocala, Florida, 32801
United States
T: 555-5555

Payment Method | [change](#)

No Payment Information Required

SHIPPING INFORMATION			
PAYMENT INFORMATION			
ORDER REVIEW			
PRODUCT NAME	PRICE	QTY	SUBTOTAL
MS AARP Brochure	\$0.00	2500	\$0.00
MS AARP Brochure	\$0.00	1	\$0.00

Customer Order Comment

Verify an Item? [Edit Your Cart](#)

PLACE ORDER

Confirmations Screen-

Your order has been received.

Thank you for your purchase!

Your order # is: [100001118](#)

You will receive an order confirmation email with details of your order and a link to track its progress.

Click [here to print](#) a copy of your order confirmation.

Continue Shopping

Account Dashboard Screen

Clicking on the MY ACCOUNT button will take you to your account dashboard. This will give you an overview of your recent orders, your contact information and shipping addresses on file. From here there are links to view all of your orders, view the details on a single specific order, manage your orders, place a reorder, manage and edit your addresses, and view your account information.

UnitedHealthcare®

Enter search keyword [Advanced Search](#) [User Guide](#) [firstname lastname](#)

Home Products **My Account** MY CART (0)

My Account

- Account Dashboard
- Account Information
- My Orders

My Dashboard

Hello, firstname lastname!

From your My Account Dashboard you have the ability to view a snapshot of your recent account activity and update your account information. Select a link below to view or edit information.

Recent Orders [view all](#)

ORDER #	DATE	SHIP TO	QUANTITY	STATUS	
100001131	8/17/2015	firstname lastname	210	On Hold	View Order Reorder
100001120	8/3/2015	firstname lastname	500	In Production	View Order Reorder
100001120	8/3/2015	firstname lastname	1000	Canceled	View Order Reorder
100001119	8/3/2015	firstname lastname	2	In Production	View Order Reorder
100001118	8/3/2015	firstname lastname	1	In Production	View Order Reorder

Account Information

100001119	8/3/2015	firstname lastname	2	In Production	View Order Reorder
100001118	8/3/2015	firstname lastname	1	In Production	View Order Reorder

Account Information

Contact Information | [edit](#)

firstname lastname
agentemail@uhc.com
[Change Password](#)

Address Book | [manage addresses](#)

Default Shipping Address | [edit address](#)

firstname lastname
9800 Health Care Ln
Minnetonka, Minnesota, 55343
United States
T: 555-555-5555

[« Return to Previous Page](#)

Account Information Screen

This screen shows you your basic account information. This is a view only screen; you are not able to edit these values. You get here by clicking the Account Information button on the left hand side of the My Account screen. If any of the information displayed needs to be changed, please contact the Producer Help Desk (PHD).

Home Products My Account MY CART (1)

My Account

- Account Dashboard
- Account Information**
- My Orders

Edit Account Information

Account Information

Name Agent name

Phone

Email Address Agent email

Role Non-Agent

[Go back](#) **SAVE**

* Required Fields

My Orders Screen

Under this selection, you will be able to view your orders within the following statuses:

- In Process-preparing for fulfillment and shipping
- On Hold-order is on hold pending to be approved
- Completed-order has been fulfilled and has shipped
- Cancelled-these orders have been cancelled and not shipped
- Approved-these orders have been approved and are processing for shipment
- All Orders-collection of all orders placed including each of the above..

Under each tab, your orders will have a link to view the details of that order. You will also have the ability to place a Reorder of the same order that was placed. This can be done by clicking on the Reorder link and then follow the directions to completion.

In Process Tab

On this screen, you are able to filter by order Number, Order To and From order dates, and Shipping Name. Each order includes itemized details.

Account Information

My Orders

IN PROCESS | **ON HOLD** | **COMPLETED** | **CANCELED** | **APPROVED** | **ALL ORDERS**

ORDER NO:

ORDER FROM DATE:

ORDER TO DATE:

SHIPPING NAME:

Search **Reset**

ORDER NO #	QUANTITY	ORDER DATE	SHIPPING NAME/DESC	ORDER STATUS	
100001120-1	500	2015-08-03	firstname lastname	In Production	View Order Reorder
	500		AARP Medicare Supplement Louisiana Enrollment Kit for Jan 1, 2015 - Dec 1, 2015 effective dates.		
00001119	2	2015-08-03	firstname lastname	In Production	View Order Reorder
	1		AARP Medicare Supplement Nebraska Enrollment Kit for Apr 1, 2015 - Dec 1, 2015 effective dates.		
	1		AARP Medicare Supplement Louisiana Enrollment Kit for Jan 1, 2015 - Dec 1, 2015 effective dates.		

Order details.

All Orders Tab

My Account

Account Dashboard

Account Information

My Orders

My Orders

IN PROCESS | **ON HOLD** | **COMPLETED** | **CANCELED** | **APPROVED** | **ALL ORDERS**

ORDER NO:

ORDER FROM DATE:

ORDER TO DATE:

SHIPPING NAME:

Search **Reset**

Download Order(s) Report

5 Item(s) Show 10 per page

ORDER NO #	ORDER QTY	ORDER DATE	SHIP TO	STATUS	TRACKING NO	KIT CODE
100001120	1000	8/3/2015	firstname lastname	On Hold		
	1000		AARP Medicare Supplement Louisiana Enrollment Kit for Jan 1, 2015 - Dec 1, 2015 - Dec 1.	Ordered		2015-AARP-KLA39

Approved Orders Tab

The information on this tab will show you all of your orders that have been approved and have been processed for shipment.

Note that, on Approved orders that have been modified, the modified order will have a “-1” added to the order number. You can click on the new order to see the order details.

Order Details Screen

Click any of the ‘View Order’ links on the My Accounts order listings. This will give you a brief description of your order and the items ordered.

The screenshot displays the 'My Orders' section of a user account. The top navigation bar includes 'Home', 'Products', 'My Account', and 'MY CART (52)'. The 'My Account' sidebar lists 'My Orders' as the active section. The main content area is titled 'In Process' and features a search filter for 'IN PROCESS' orders. Below the search filters, there is a table of orders with the following data:

ORDER NO #	QUANTITY	ORDER DATE	SHIPPING NAME/DESC	ORDER STATUS	
10000999	31	2015-07-15	Brian P Cosgrove	In Production	View Order
	30				
	1				
10000987	30	2015-07-13	Brian Cosgrove	In Production	View Order
	30				
10000986	65	2015-07-13	Brian Cosgrove	In Production	View Order

- My Account**
- Account Dashboard
 - Account Information
 - My Orders

Order #100009572 - Complete

[Print Order](#)

About This Order: **Order Information** Invoices Shipments

Order Date: August 29, 2014

Shipping Address

UNISOURCE LLC
 3012 SHAWNEE DRIVE
 FORT WAYNE, Indiana, 46807
 United States
 T: 2607058929

Shipping Method

Free Shipping - Free

Billing Address

UNISOURCE LLC
 3012 SHAWNEE DRIVE
 FORT WAYNE, Indiana, 46807
 United States
 T: 2607058929

Payment Method

No Payment Information Required

Items Ordered | [track your order](#)

PRODUCT NAME	SKU	PRICE	QTY	SUBTOTAL
2015 English Enrollment Guide: AARP MedicareComplete Choice (PPO) H1509-010	3737	\$0.00	Ordered: 30 Shipped: 30	\$0.00
			Subtotal	\$0.00
			Shipping & Handling	\$0.00
			Grand Total	\$0.00

About Your Order

Oct 1, 2014 5:22:38 AM

Status changed to In Production.

Aug 29, 2014 4:58:15 PM

Approved By Approver/Admin



Address Book

To access your Address Book, click on the following::

My Account, then

Account Dashboard, then

Address Book | [manage addresses](#).

This screen allows you to edit any of the existing addresses related to your account or add in new addresses that can be used for future orders. To do this, click the ADD NEW ADDRESS button to add a new address or click the change address buttons to change existing addresses associated with your account.

The screenshot shows the 'Address Book' page. On the left is a 'My Account' sidebar with links for 'Account Dashboard', 'Account Information', and 'My Orders'. The main content area is titled 'Address Book' and contains two sections: 'Default Addresses' and 'Additional Address Entries'. In the 'Default Addresses' section, there is one entry for 'Default Shipping Address' with a 'change shipping address' link. In the 'Additional Address Entries' section, there are two entries, each with 'Edit Address' and 'Delete Address' links. A blue 'ADD NEW ADDRESS' button is located in the top right corner. Green circles highlight the 'change shipping address' link, the 'Edit Address' and 'Delete Address' links for both additional entries, and the 'ADD NEW ADDRESS' button.

Tracking Your Orders

Below is an example of where to locate your delivery tracking information. You can find this after clicking track your order in the items ordered section, once you see the status of your order is "complete".

Items Ordered				
PRODUCT NAME	SKU	PRICE	QTY	SUBTOTAL
2015 English Enrollment Guide: AARP MedicareComplete Choice (PPO) H1509-010	3737	\$0.00	Ordered: 30 Shipped: 30	\$0.00
			Subtotal	\$0.00
			Shipping & Handling	\$0.00
			Grand Total	\$0.00

Tracking Information

Close Window

Shipment #100121524

Tracking Number:	1ZA8660E0360654528
Carrier:	United Parcel Service
Track:	http://wwwapps.ups.com/WebTracking/processInputRequest?HTMLVersion=5.0&error_carried=true&tracknums_displayed=5&TypeOfInquiryNumber=T&loc=en_US&InquiryNumber1=1ZA8660E0360654528&AgreeToTermsAndConditions=yes

Shipment #100121525

Tracking Number:	1Z8884RR0312694219
Carrier:	United Parcel Service
Track:	http://wwwapps.ups.com/WebTracking/processInputRequest?HTMLVersion=5.0&error_carried=true&tracknums_displayed=5&TypeOfInquiryNumber=T&loc=en_US&InquiryNumber1=1Z8884RR0312694219&AgreeToTermsAndConditions=yes

Shipment #100121920


Tracking Number:	1Z8884RR0312694773
Carrier:	United Parcel Service
Track:	http://wwwapps.ups.com/WebTracking/processInputRequest?HTMLVersion=5.0&error_carried=true&tracknums_displayed=5&TypeOfInquiryNumber=T&loc=en_US&InquiryNumber1=1Z8884RR0312694773&AgreeToTermsAndConditions=yes

Close Window


Personalization of Kits/Enrollment Guides:

This option is available for Medicare Supplement, MA and PDP materials. This is a feature that enables you to have your guides personalized with your name, your phone number and your email address.

The screenshot shows the UnitedHealthcare website interface. At the top, there is a navigation bar with "Home", "Products", and "My Account" links. Below this is a "Shopping Cart" section. The cart header includes a "CHECK ALL ITEMS" checkbox, "QUANTITY" labels, and "QUANTITY REQ" labels. A single item is listed in the cart:

Item	SKU	Quantity	Quantity Req
 Enrollment Materials	201508140659115 Description: AARP Medicare Supplement Minnesota Enrollment Kit for Jan 1, 2015 - Dec 1, 2015 effective dates.	1	10

Below the item description, there is a checkbox labeled "Do you want to Personalize this kit?". A red oval highlights this checkbox. To the right of the cart items, there is a "Delete All Che" button.

CHECK ALL ITEMS		QUANTITY	QUANTITY REQUESTED	TOTAL REQ	
	SKU: 201606270614112 Description: AARP Medicare Supplement Minnesota Enrollment Kit for July 1, 2016 - Dec 1, 2016 effective dates.	1	X <input type="text" value="1"/>	1	
Must Click to Update					
<input checked="" type="checkbox"/> Do you want to Personalize this kit?					
Agent 1:				<input type="button" value="Add More Agents"/>	
First Name	<input type="text"/>	Middle Initial	<input type="text"/>	Last Name	<input type="text"/>
PhoneNo	<input type="text"/>	Email	<input type="text"/>	Qty*	<input type="text"/>
Agent ID	<input type="text"/>				
<input type="button" value="Save Personalize Data"/>				<input type="button" value="Delete All Checked"/>	Total 1

Fill in Agent First Name, Agent Last Name, Phone Number, Email address, Quantity and Agent ID. Quantity is the number of your order that you would like to have personalized. This should equal your original quantity number placed on your order. Be sure to Save Personalized Data when complete. You may Add More Agents to personalize batches of the same Material within the order. The quantity will automatically be changed to match the number of pieces if multiple Agents are added.

Shopping Cart

Proceed To Checkout

CHECK ALL ITEMS	QUANTITY	QUANTITY REQUESTED	TOTAL REQUESTED
 SKU: 201508140655115 Description: AARP Medicare Supplement Minnesota Enrollment Kit for Jan 1, 2015 - Dec 1, 2015 effective dates.	1	30	30

Do you want to Personalize this kit?

Agent 1:

Name:
Qty:

PhoneNo:

Add More Agents

Agent 2:

Name:
Qty:

PhoneNo:

Save Personalize Data

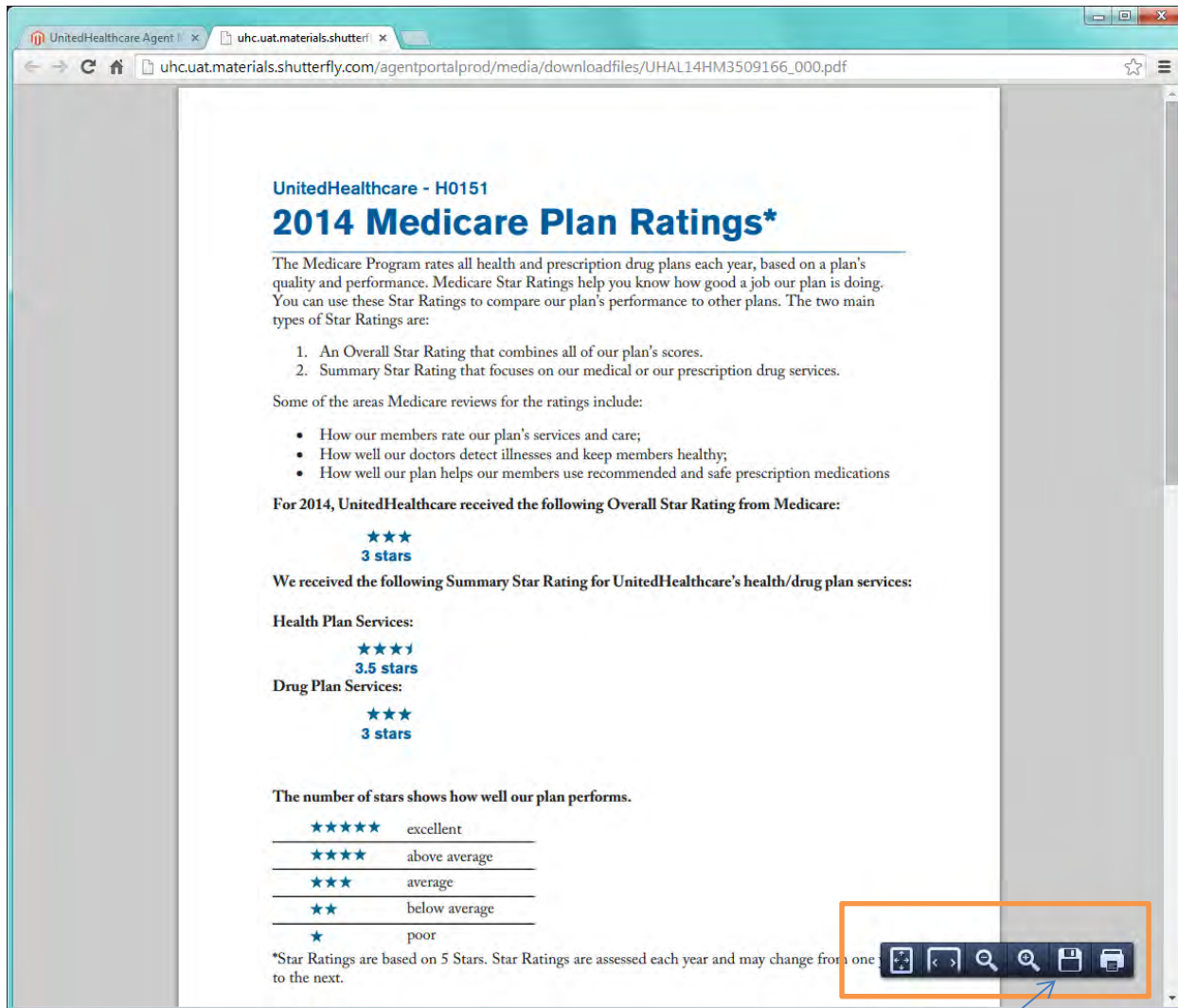


Downloading PDF's

If an item is available for download you will see a blue Download button. Click this button and the documents will open in a new tab or window in your browser. This will look slightly different depending on the browser you are using. Move your pointer towards the bottom of the page and you should see a popup menu with options for the file. One will be the option to save. Click the save option and a window will open to select the location you would like the file saved to. Be sure not to change the .pdf portion of the file name or you may not be able to open the document that you have saved. See examples on the next two pages using the two most popular browsers.



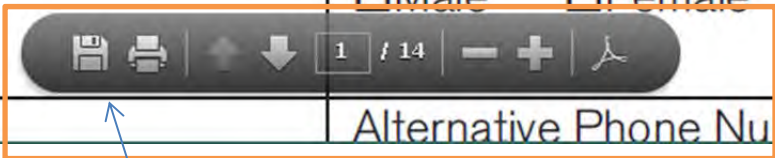
As seen when using Chrome:



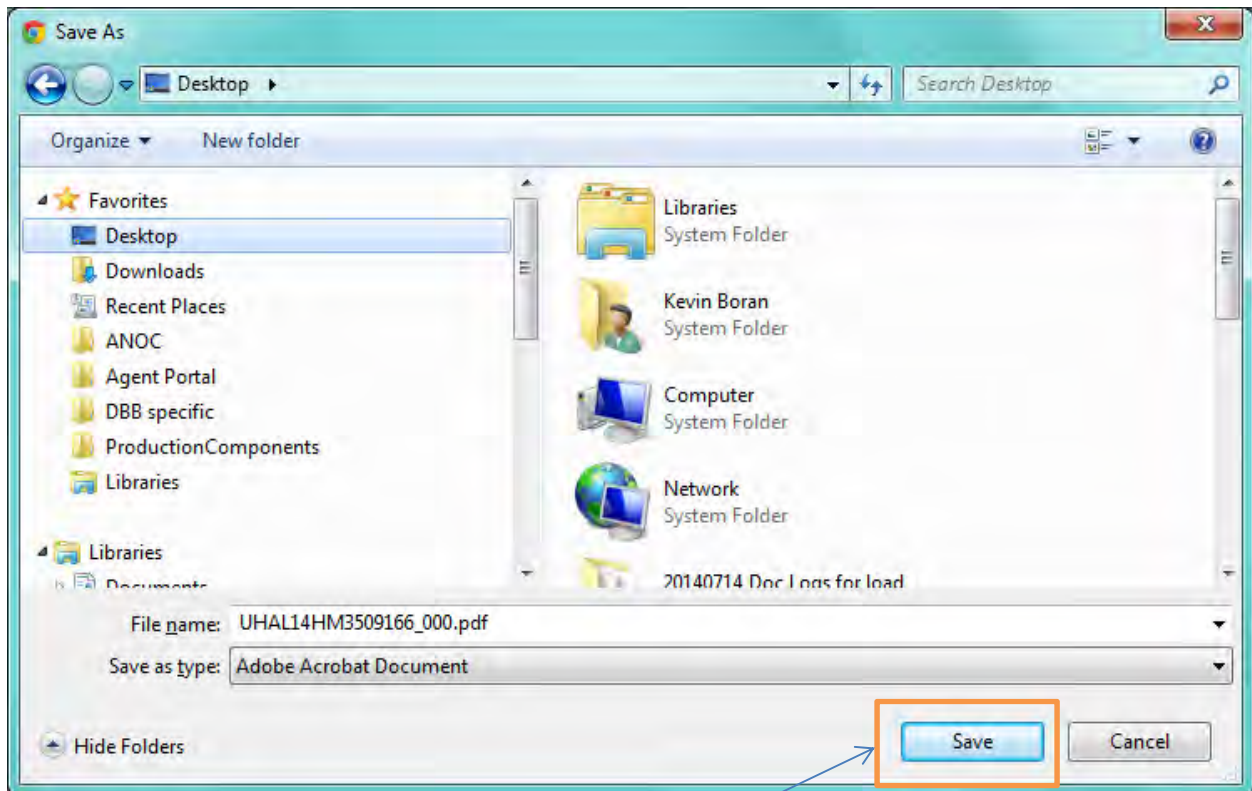
Chrome: Select the save option.

As seen when using Internet Explorer 10:

<input type="text"/>	First Name <input type="text"/>
<input type="text"/>	Sex <input type="checkbox"/> Male <input type="checkbox"/> Female
<input type="text"/>	Alternative Phone Number <input type="text"/>



Internet Explorer: Select the save option.



Select the location where you want to save your file and click the save button.