



Small Business COBRA, Flexible Spending Account and Pre-Tax Premium Implementation Checklist

Thank you for selecting UnitedHealthcare to administer your COBRA, Flexible Spending Account and Pre-Tax Premium plans. Use this easy to use checklist to make sure your implementation runs smoothly.

- Received Welcome Letter - Once you have been assigned a New Business Group Number you will be sent a Welcome Letter containing information on the No Fee Services offered to you (COBRA, FSA, and PTP). If you provided an email address, the Welcome Letter will be sent to you from **UHC_notification@uhc.com** (please be sure to check your spam and junk folders to ensure the email is not filtered out), otherwise, it will be mailed.
- Save initial User Name & Password - Please make note of your login information on the Welcome Letter. This is a unique website for administration services. You can add additional users to this website once you activate your account.
- Sign up for the Pre-Implementation Webinar (optional) to help you navigate through **uhcservices.com**, we host a bi-weekly pre-implementation Webinar. You can sign up for the optional Pre-Implementation Webinar by contacting our Customer Advocate Center at **800-318-5311** or emailing us at **cac@uhcservices.com**.
 - Activate your COBRA Account
 - Activate your Flexible Spending Account
 - Activate your Pre-Tax Premium Account

Once requested services have been activated, the information that you provided online will be reviewed and used for the set up in our system. You may be required to return to the website to provide additional information (ie: Participant Data) before we complete the implementation of services.

- Provide additional requested information (if any)
- COBRA - Implementation Time-Frame 7-10 business days
- FSA - Implementation Time-Frame is 3-4 weeks
- Sign up for the UnitedHealthcare Bundled Services web demo (optional) - Once the installation has been completed, you will receive an invitation to attend the post-implementation website demonstration that will provide additional instructions on how to navigate and use **https://employer.uhcbs.com** for your selected services.



Employer Responsibilities

- ▶ COBRA
 - Enter COBRA take-over participants
 - Enter new Qualifying Event Notifications
 - Enter Status Change information
 - View participant data
 - View/print resource forms
 - Generate Reports/New Hire/General Notice
- ▶ FSA:
 - Upload FSA eligible employees at <https://employer.uhcbs.com>
 - Enter New Enrollee or Mid-Year Election Changes
 - View participant election information
 - Access weekly Employer Funding Notification report and other pertinent report
 - Access online resources



Participant Responsibilities

- ▶ COBRA:
 - Register Online at www.uhcservices.com
 - Enroll in Cobra (for new QENs)
 - View/Print Previously sent letters
 - Make Payments
- ▶ FSA:
 - Register Online at <https://member.uhcbs.com>
 - Submit Claims
 - View Account Information
 - Print Forms



UnitedHealthcare Responsibilities

- ▶ COBRA
 - Create initial billing for take over participants
 - Begin processing new Qualifying Event Notifications (QEN)
 - Collect Premiums
 - Send Eligibility to carriers
- ▶ FSA:
 - Issue participant debit cards
 - Process claims
 - Issue reimbursements
 - Enter New Enrollee or Mid-Year Election Changes
 - View participant election information
 - Provide Funding Notifications and access to a variety of reports on the website