



UPMC Health Plan e Solution Tips for Producers

How to identify a potential UPMC Health Plan e solution opportunity:

1. When the HR/benefits representative or owner (or benefit designate) is:
 - ✓ Comfortable using the Internet
 - ✓ Willing to be actively involved in the health insurance carrier selection process
 - ✓ Willing to complete ongoing benefit administration online, e.g., billing, employee changes, etc.
2. When all employees are able to use a computer, have a current e-mail address,* and have access to a computer with the Internet.

Employee e-mail address collection processes:

- **New sale, for groups with 2 to 50 lives** – Employer/producer will enter the employees' e-mail addresses when entering census information.
- **New sale, for groups with 51 or more lives** – Employer/producer provides an Excel spreadsheet with columns for the following required employee census information: First Name, Last Name, Date of Birth, Gender, Coverage Type, ZIP Code, and E-Mail Address.
- **Renewal, for groups of all sizes** – Employee must log in to the UPMC Health Plan member website, create a profile (if not already completed), and enter an e-mail address. Employees must complete this step 15 days prior to the renewal date. UPMC Health Plan is not permitted to provide details on whether a specific employee has or has not completed this step. **If 100% of employees have not completed this step 15 days prior to the renewal date, the rate reduction will no longer be applicable.**

The following are the unique steps for e solution for a quote within the producer portal:

Step 1: On the “Dashboard – Quote Summary” screen – Click on “Yes” to “Is this an e solution client?”

Step 2: On the “Census” screen – Enter e-mail addresses. (Alternatively, the employer can complete e-mail address fields prior to medical underwriting.)

Step 3: On the “Rates” screen – Illustrative rates are generated with the e solution discount. For non-e solution Illustrative Rates, click on “No” to “Is this an e solution client?” and new Illustrative Rates will be generated.

Step 4: On the “Submit” screen – Complete the “Company Contact Field” (if not previously completed), and click on the materials that you would like sent to the employer. Then click on “Submit.”

Step 5: Once the group accepts, direct the employer to complete the “Employer OnLine Registration” form. The form is located at www.upmcheathplan.com. Click on “New User Registration” and then click on “Employer Access Request Form.” **This form must be returned to UPMC Health Plan at time of sale for new sales and 15 days before renewal date for renewing groups. No exceptions. At least one contact from the employer group must be enrolled in Employer OnLine.** Producers can be a designate.

*It is recommended that employees have a work e-mail address to streamline the quoting process. Rates are not released with the e discount until all employee e-mail addresses are provided. Employees can change their e-mail address after the company has elected UPMC Health Plan.