

Retail Reporting Tool (RRT) User's Guide August 2016

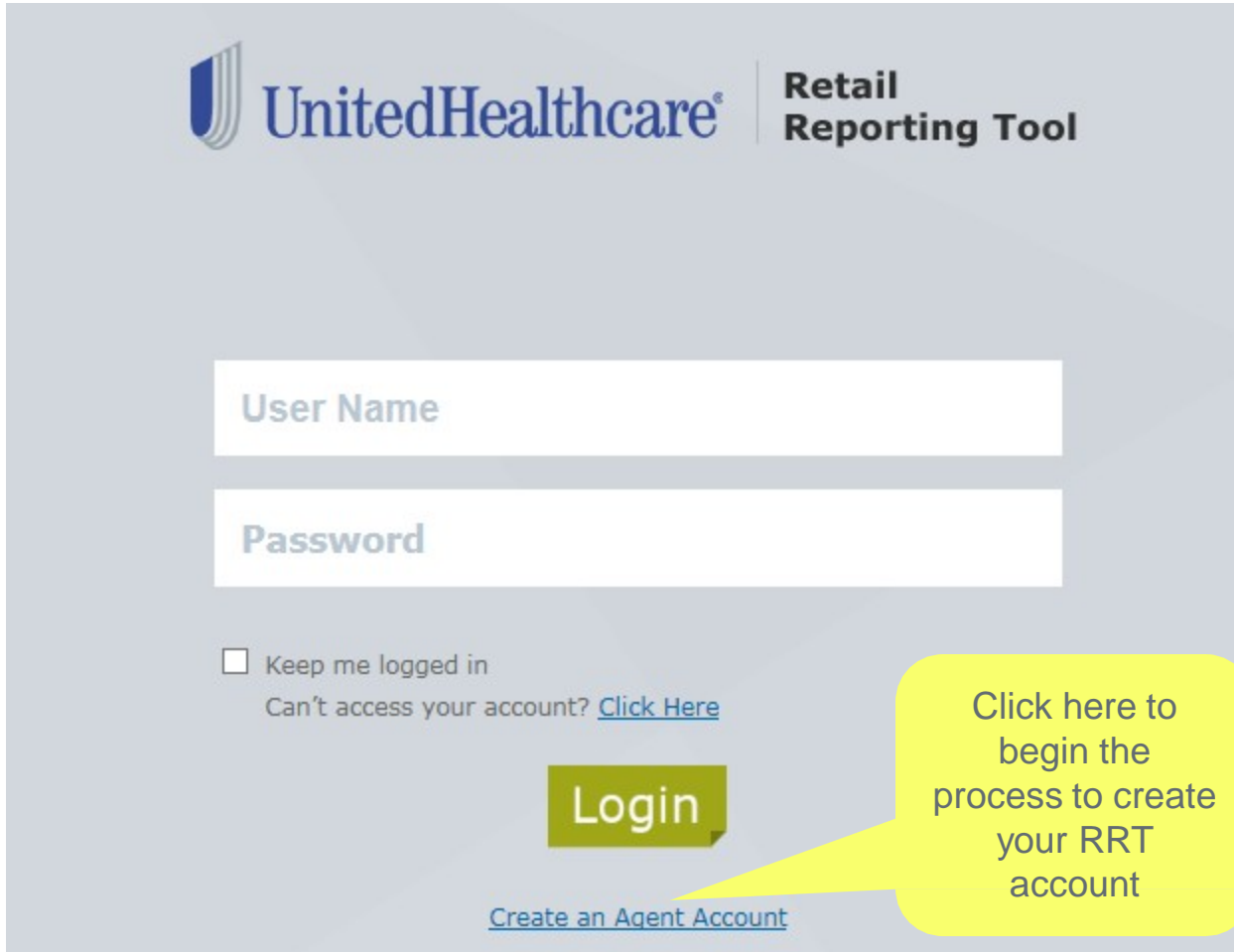
User Guide

- The retail reporting tool will be the location you will file all of your retail activity reports
- It is essential that accurate reporting is completed so we can measure the success of the program



Agent Account Creation

- After 9/1/2016, agents can create their own account in the RRT
- Go to URL: <https://www.uhcreportingtool.com>



UnitedHealthcare® | Retail Reporting Tool

User Name

Password

Keep me logged in
Can't access your account? [Click Here](#)

Login

[Create an Agent Account](#)

Click here to begin the process to create your RRT account

Agent Account Creation



Retail
Reporting Tool

User Registration

Registration

Basic Details:

Party ID:

1234567

Email :

YOUR E-MAIL HERE |

x

*

Submit

[Contact Support](#)

Enter your Party ID here. This is not the same as your writing number. If you do not know your Party ID, please contact your Agent Manager or the Producers Help Desk (PHD) phd@uhc.com
888 381 8581

Enter your e-mail address here. It must match the address on file with UnitedHealthcare

** New this year- Contact Support



Retail Reporting Tool

Fill in the required fields and hit save for support. You will receive an email back within 24-48 business hours regarding your issue

Contact Support is new this year and can be clicked on in the event you have issues with Registration, as well it's available in the Edit Profile section after you've registered

Registration Support

Party ID:

ail :

Registration Support

Party ID:

Email :

Query :

Security Code : B73B3P

Enter captcha

Save Cancel

[Contact Support](#)

Agent Account Creation- Registration



User Registration

Registration

Basic Details:

Party ID:	444959
Email :	contracting@salesperson.com
First Name :	Johanna
Last Name :	EDC
Job Role :	Field Sales <input type="checkbox"/>
Agent Manager :	Unknown <input type="checkbox"/>
Password :	<input type="password"/>
Confirm Password :	<input type="password"/>
Company :	<input type="text"/>

Information displayed in the greyed out fields is not editable. If there is an error click on the contact support link to report the error

Select your Agent Manager from the dropdown. If you cannot find them, select "Unknown" and notify your Agent Manager

Create your new password here. Password must contain 6 to 12 characters

If above information is incorrect please [Contact Support](#)

Agent Account Creation- Registration continued

Enter your street address here, this is the address we will ship your reward pens to. No PO Boxes please

Confirm Password :

Company :

Address :

Address 1 :

Address 2 :

State :

City :

Zip :

Select city and state from the dropdowns

Entering phone number is optional

Contact:

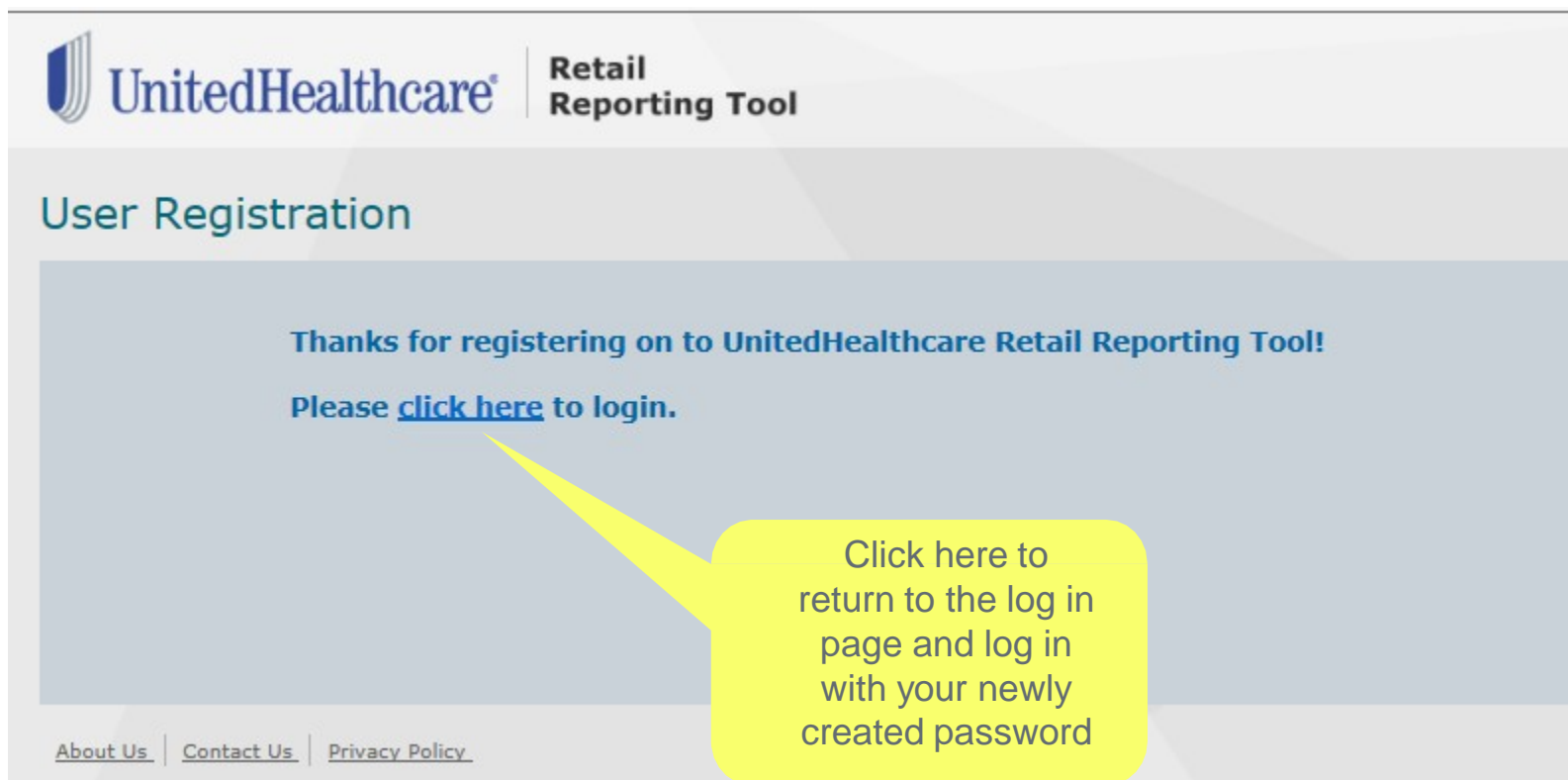
Phone Number :


Click save when you are done

Save

Agent Account Creation Confirmation

- You will receive the message below after you have completed your registration



 **UnitedHealthcare** | **Retail Reporting Tool**

User Registration

Thanks for registering on to UnitedHealthcare Retail Reporting Tool!

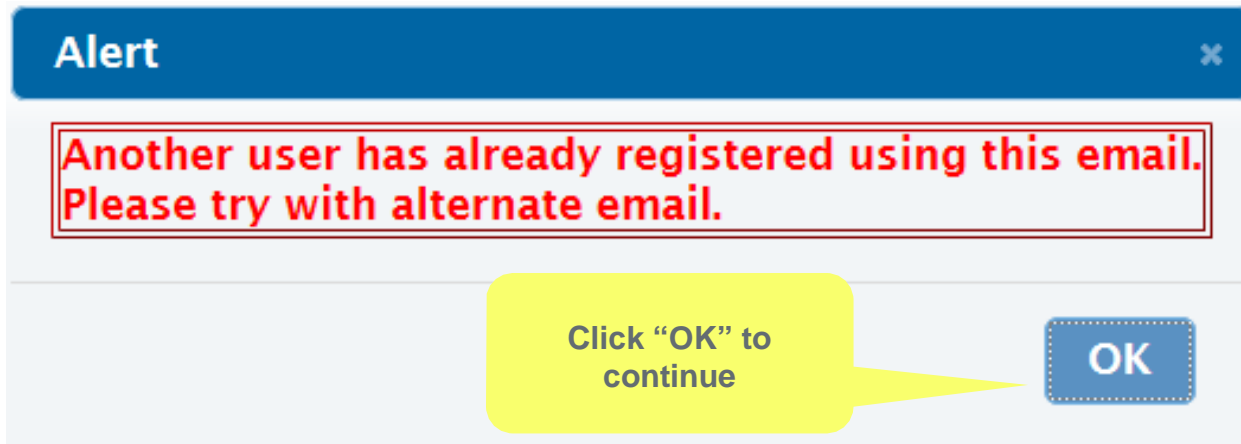
Please [click here](#) to login.

Click here to return to the log in page and log in with your newly created password

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Agent Account Creation- E-mail address already in use

Some agencies will use a common e-mail address on file with UnitedHealthcare for every agent in the agency. Since the RRT uses the e-mail address as the username, only one account can use that common e-mail. Any additional users must select an alternate e-mail address. If you receive the alert below, please follow the procedure outlined on the following slides



Alert ×

**Another user has already registered using this email.
Please try with alternate email.**

Click "OK" to continue

OK

Agent Account Creation- E-mail address already in use

User Registration

Registration

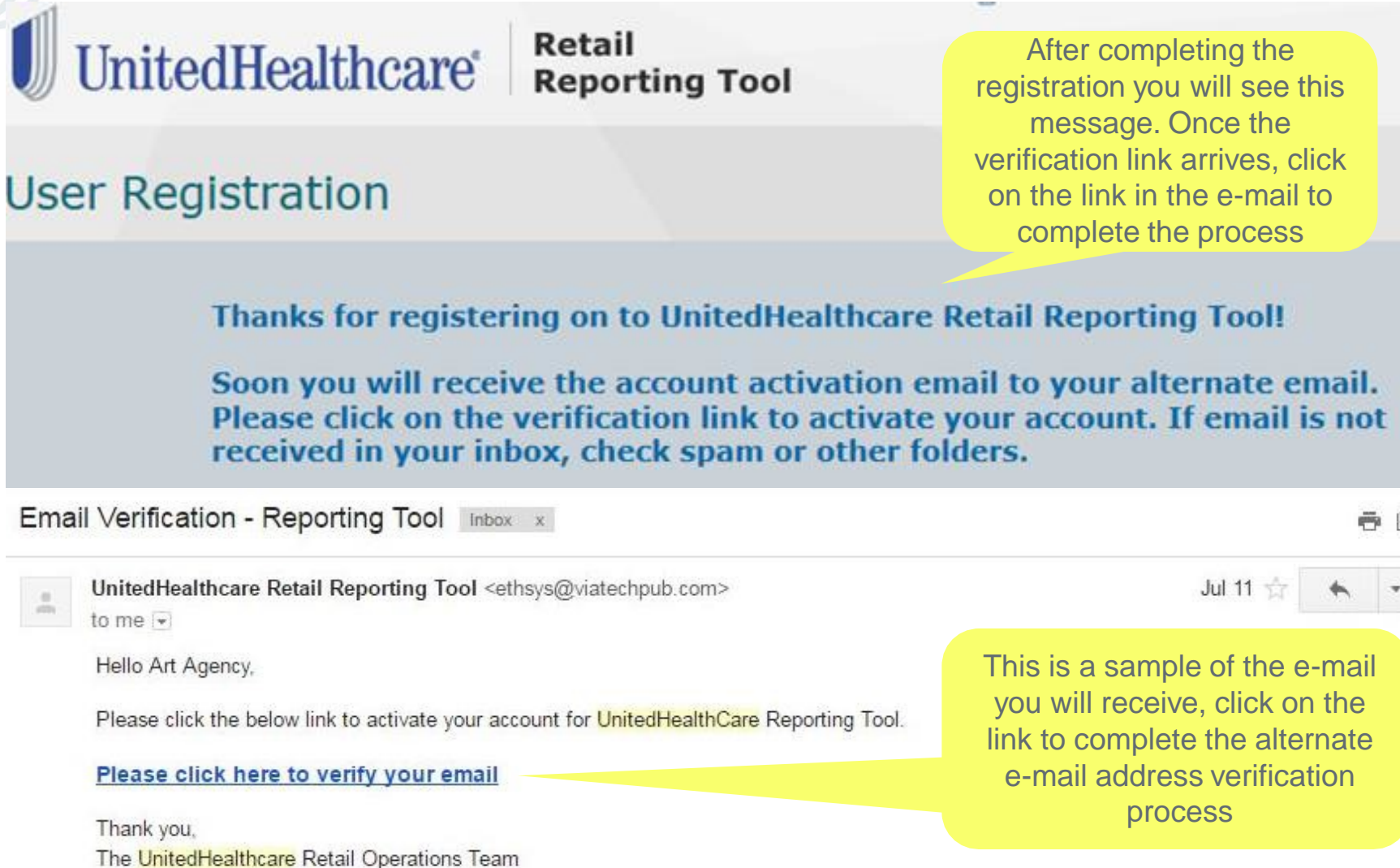
Basic Details:

Party ID:	612593
Email :	contracting@uiginc.com
Alternate Email :	<input type="text"/>
First Name :	<input type="text"/>
Last Name :	<input type="text"/>
Agent Role :	--Select Role-- <input type="button" value="v"/>
Agent Manager :	--Select Agent Manager-- <input type="button" value="v"/>

Enter an alternate e-mail address here. This e-mail will be the address we send an account verification link to. It will also be the e-mail used as the account user name, and will be the address used in the event you need to reset your password

After entering an alternate e-mail address, complete the rest of the registration form as indicated in slides 5 and 6

Agent Account Creation- E-mail address already in use




UnitedHealthcare | **Retail Reporting Tool**

User Registration

Thanks for registering on to UnitedHealthcare Retail Reporting Tool!

Soon you will receive the account activation email to your alternate email. Please click on the verification link to activate your account. If email is not received in your inbox, check spam or other folders.

Email Verification - Reporting Tool Inbox: x

 **UnitedHealthcare Retail Reporting Tool** <ethsys@viatechpub.com> Jul 11 ☆ ↩ ▾

to me ▾

Hello Art Agency,

Please click the below link to activate your account for UnitedHealthCare Reporting Tool.

[Please click here to verify your email](#)

Thank you,
The UnitedHealthcare Retail Operations Team

After completing the registration you will see this message. Once the verification link arrives, click on the link in the e-mail to complete the process

This is a sample of the e-mail you will receive, click on the link to complete the alternate e-mail address verification process

Agent Account Creation- E-mail address already in use



Email Verification

Email Verification

You will see this page when you click on the link in the verification e-mail

Your account has been verified.

Please [click here](#) to login.

Click here to return to the login page. Remember to use the alternate e-mail you just verified as your user name

First time log in

- After clicking on the link from the registration confirmation page you will be taken here
- Bookmark this page for future use
- Home Page web address:

www.uhcreportingtool.com



The screenshot shows the login interface for the UnitedHealthcare Retail Reporting Tool. It features the UnitedHealthcare logo and the title 'Retail Reporting Tool'. There are two input fields: 'User Name' and 'Password'. Below the fields is a checkbox labeled 'Keep me logged in' and a link 'Can't access your account? Click Here'. A green 'Login' button is at the bottom. Yellow callout boxes provide instructions: 'User name is your e-mail address' points to the User Name field; 'Enter the password you created during registration' points to the Password field; 'Click here to login' points to the Login button; and 'If you forget your password, click here to reset your password' points to the 'Click Here' link.

UnitedHealthcare | **Retail Reporting Tool**

User Name

Password

Keep me logged in
Can't access your account? [Click Here](#)

Login

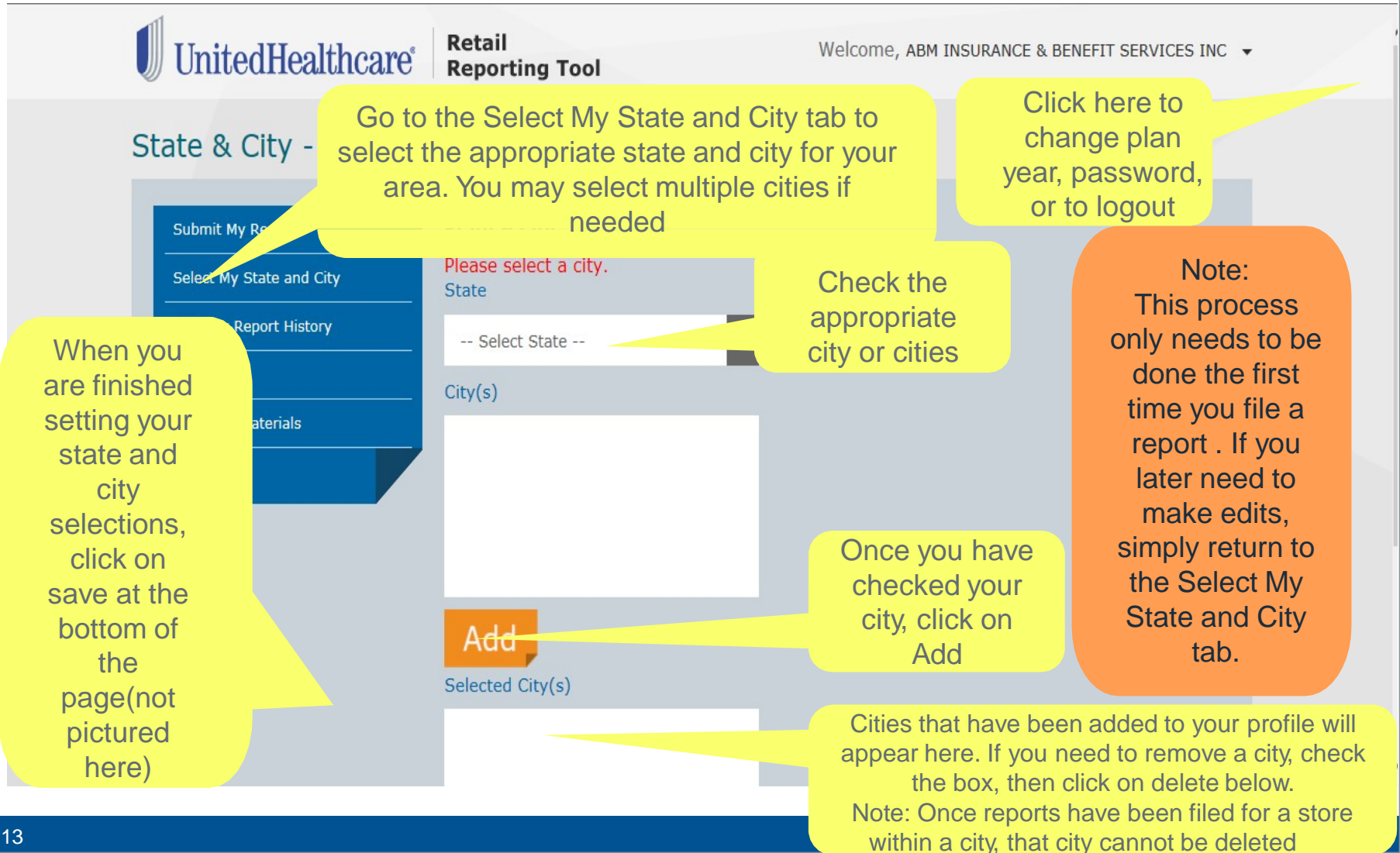
User name is your e-mail address

Enter the password you created during registration

Click here to login

If you forget your password, click here to reset your password

Selecting your city and state



The screenshot shows the 'Retail Reporting Tool' interface. At the top left is the UnitedHealthcare logo. To its right is the text 'Retail Reporting Tool'. Further right is a user greeting: 'Welcome, ABM INSURANCE & BENEFIT SERVICES INC'. Below the header is a navigation menu with options: 'Submit My Report', 'Select My State and City', 'Report History', and 'Materials'. The 'Select My State and City' option is highlighted. The main content area contains a form with the following elements:

- A red error message: 'Please select a city.'
- A 'State' dropdown menu with the text '-- Select State --'.
- A 'City(s)' text input field.
- An 'Add' button.
- A 'Selected City(s)' list area.

Yellow callout boxes provide instructions:

- One points to the 'Select My State and City' tab: 'Go to the Select My State and City tab to select the appropriate state and city for your area. You may select multiple cities if needed'.
- Another points to the top right: 'Click here to change plan year, password, or to logout'.
- A third points to the 'State' dropdown: 'Check the appropriate city or cities'.
- A fourth points to the 'Add' button: 'Once you have checked your city, click on Add'.
- A fifth points to the 'Selected City(s)' area: 'Cities that have been added to your profile will appear here. If you need to remove a city, check the box, then click on delete below. Note: Once reports have been filed for a store within a city, that city cannot be deleted'.

An orange callout box on the right contains a note: 'Note: This process only needs to be done the first time you file a report. If you later need to make edits, simply return to the Select My State and City tab.'

A large yellow callout box on the left states: 'When you are finished setting your state and city selections, click on save at the bottom of the page(not pictured here)'.

Submitting your report



Click on the Submit My Report tab Note: this will be your default page next time you log into the tool

SERVICES INC ▾

Submit My Report - 2017

- Submit My Report
- Select My State and City
- View My Report History
- Edit Profile
- Resource Materials

Submit My Report

Slide : 1

Select Time Period

Select Store

Enter Hours

Appointments Set

Enter Visitors ? :

Medicare Eligibles

Members

Calendar for August 2016:

August 2016						
Su	Mo	Tu	We	Th	Fr	Sa
	1	2	3	4	5	6
7	8	9	10	11	12	13
14	15	16	17	18	19	20
21	22	23	24	25	26	27
28	29	30	31			

Done

Click on the Select Time Period field, a calendar will appear. Click on the date that you want to file the report for. Note: you cannot select a date in the future

Submitting your report



Retail Reporting Tool

Welcome, ABM INSURANCE & BENEFIT SERVICES INC ▾

Submit My Report - 2017

Submit My Report

Select My State and City

View My Report History

Edit Profile

Resource Materials

Submit My Report

Select Time Period

08/18/2016

Select Store

(Kiosk) - Walgreens, 444 2ND

Enter Hours

Appointments Set

Enter Visitors ? :

Medicare Eligibles

Members

-- Select Store --

(Kiosk) - Walgreens, 444 2ND AVE NW, CULLMAN

(Kiosk) - Walgreens, 1700 2ND AVE SW, CULLMAN

Click on the Select Store dropdown

Click on the store that you are filing the report for

Submitting your report



The screenshot shows the 'Submit My Report - 2017' page. On the left is a navigation menu with options: Submit My Report, Select My State and City, View My Report History, Edit Profile, and Resource Materials. The main area contains a form with the following sections:

- Enter Leads ?:** Medicare Eligibles, Members, Medicare Leads, Other Leads.
- Enter Apps:** MA (Non SNP) Apps, PDP Apps, Med Supp Apps, MA (SNP) Apps, Other Apps.

 Below the form are 'Clear All', numbered buttons (1, 2, 3), a '+' button, and a large 'Save' button. A yellow callout points to the '?' icon: 'Hover over the "?" for the field definition'. Another yellow callout points to the input fields: 'Enter the requested information in this area. If an item is 0, you may leave it blank'. A third yellow callout points to the 'Save' button: 'When Reports are complete, click Save'. A fourth yellow callout points to the bottom of the page: 'To file additional reports, click here'. An 'Alert' box at the bottom right displays the message: 'Report(s) has been successfully saved.' with an 'OK' button.

Pens!!

Pen Shipment Address

Thank you for submitting the report. Minimum 3 reports have to be submitted to get pens, please verify your shipment address.

Shipment Address : 123 Help St

State : Alabama(AL) ▼

City : CULLMAN ▼

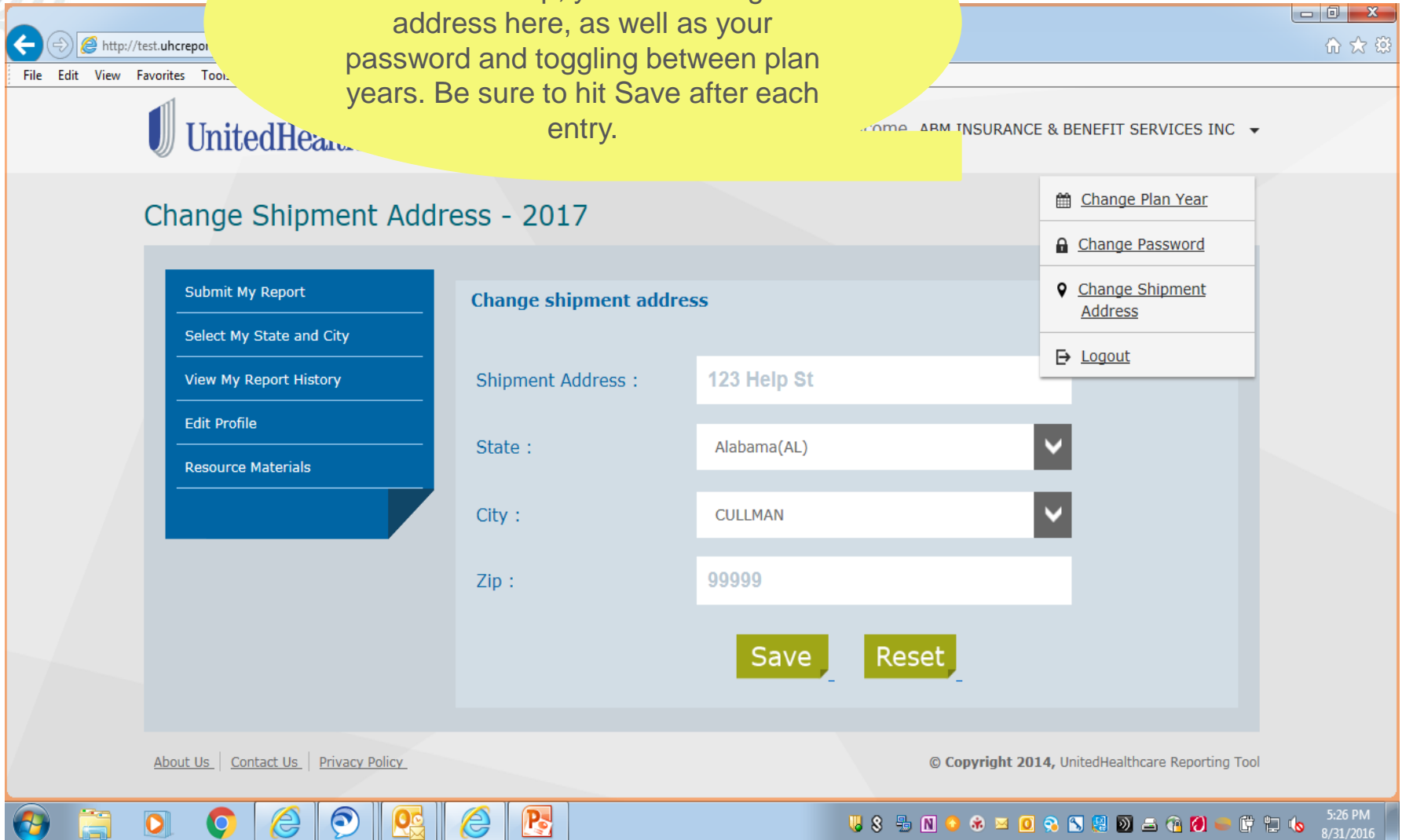
Zip : 35055

- After you create your account and file your first two weeks of reports, you will be rewarded with a box of UnitedHealthcare branded pens!
- The reward of pens can be earned two more times during the AEP selling season for a total of 3 boxes of pens

Each pen shipment consists of 25 pens

Pens!!

If you would like your pens shipped to a location other than what was entered in account set up, you can change the address here, as well as your password and toggling between plan years. Be sure to hit Save after each entry.



Change Shipment Address - 2017

[Submit My Report](#)
[Select My State and City](#)
[View My Report History](#)
[Edit Profile](#)
[Resource Materials](#)

Change shipment address

Shipment Address : 123 Help St

State : Alabama(AL) ▼

City : CULLMAN ▼

Zip : 99999

[Save](#) [Reset](#)

[Change Plan Year](#)
[Change Password](#)
[Change Shipment Address](#)
[Logout](#)

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5:26 PM
8/31/2016

Viewing your report history



Retail Reporting Tool

Welcome, ABM INSURANCE & BENEFIT SERVICES INC ▾

View My Report History - 2017

- Submit My Report
- Select My State and Plan
- View My Report History**
- Edit Profile
- Resource Materials

Click on View My Report History tab

View My Report History

Date

Store

By default you will see all reports you have filed. If you want to filter to a single store, select that store from the dropdown

Date	Store	Type	Hours	Medicare Eligibles	Members	Print Ads	Mail
08/02/2016	Walgreens, 444 2ND AVE NW, CULLMAN	Kiosk	5	5	0	-	-

1

Click the export to excel button to export your report to an excel spreadsheet

Export To Excel

Edit Profile



Retail
Reporting Tool

Greyed out areas are not editable, click here to request a change to those details that are greyed out

Edit Profile - 2017

Submit My Report

Select My State and City

View My Report History

Edit Profile

Resource Materials

Edit Profile

[Contact Support to change details](#)

Basic Details:

Party ID:

50243

Email :

mike.alexander@cobensrv

First Name :

ABM INSURANCE & BENE

Information below the address line can be edited. Be sure to hit Save at the bottom of the page after any changes have been made

Address :

Address 1 :

123 Help St

Resource materials



Retail
Reporting Tool

Welcome, ABM INSURANCE & BENEFIT SERVICES INC ▾

Resource Materials

Submit My Report

Select My State and City

View My Report History

Edit Profile

Resource Materials

2016 Kmart Summary.pdf | 2016 Kmart Summary

[Download](#)

25/08/2016

2015_Wegmans_Summary.pdf | Wegmans Summary

[Download](#)

30/09/2015

2015_Walgreens_Summary.pdf | Walgreens Summary

[Download](#)

30/09/2015

Summary

30/09/2015

Summary

30/09/2015

Click here to download
the described
document

Click on the Resource
Materials tab to access
valuable information
such as the Retailer
Summary sheets

Need help?

Please contact:

Shelly Fecht

shelly_j_fecht@uhc.com

608.206.0869

OR

PHD

phd@uhc.com

888.381.8581

OR

The new * Contact Support link