



Central & East

New sales bonus

For agents who sell new level-funded medical plans
with up to 50 eligible employees



UnitedHealthcare is offering a bonus to agents in the Central and East regions who sell new level-funded medical plans with up to 50 eligible employees with effective dates from Oct. 1, 2023, through Jan. 31, 2024, using the Benefitter quoting tool to complete Individual Medical Questionnaires (IMQs) or upload applications for underwriting. Eligible agents will receive a \$250 per case bonus for up to the first 5 eligible cases sold during the bonus period, for a maximum bonus payable per agency of one thousand two hundred and fifty dollars (\$1,250.00).

Bonus example: An eligible agent uses the Benefitter quoting tool to submit 3 eligible medical cases by submitting individual medical questionnaires to underwriting and sells those cases during the bonus period. That makes the agent eligible for a bonus of \$750.

Program details

1. Only Agents of Record permanently located in the following areas are eligible for this program:
 - a. Central Region: Illinois, Indiana, Iowa, Kansas, Michigan, Minnesota, Missouri, Nebraska, North Dakota, Ohio, Oklahoma, South Dakota, Texas, Wisconsin; and
 - b. East Region: Alabama, Arkansas, Connecticut, Delaware, District of Columbia, Florida, Georgia, Kentucky, Louisiana, Maine, Maryland, Massachusetts, Mississippi, New Hampshire, New Jersey, North Carolina, Pennsylvania, Rhode Island, South Carolina, Tennessee, Vermont, Virginia and West Virginia
2. This special bonus program applies only to new level-funded medical groups where the original proposal for medical coverage was requested and obtained using the Benefitter quoting tool to complete Individual Medical Questionnaires (IMQs) or upload applications for underwriting, and that:
 - a. Have up to 50 eligible employees;
 - b. Have effective dates from Oct. 1, 2023, through Jan. 31, 2024
3. Maximum bonus payable per agency is one thousand two hundred and fifty dollars (\$1,250.00)
4. All sold business must be active and the selling agent must remain the Agent of Record on Jan. 31, 2024, to be included in the bonus calculations.
5. Classification as a group “with up to 50 eligible employees” is determined by us considering several factors, including the enrollment at some point in time. We reserve the right to classify groups according to our rules, regardless of a group’s actual enrollment at any time.
6. The enrolled employee counts will be derived from the medical plan only and will be based on the number of enrolled medical employees as of the group’s effective date. UnitedHealthcare’s determination of group and enrolled employee count is final.
7. All bonus payments will be made to the agent or agency to which the commissions are paid. The bonus will be paid after the bonus period is over and when all information required for verification of enrollment data and calculation of the bonus is available.
8. For dual or multiple broker arrangements, the bonus will be allocated in the same proportion as the commissions are split on the case.
9. General Agents are not eligible for the bonus.
10. Cases transferring into the up to 50 eligible employee size segment from another UnitedHealth Group subsidiary, business segment, product or case size segment will not be considered new business for this bonus program. Agent of Record changes on existing UnitedHealthcare cases will not be credited as new business for this bonus program.
11. Special rules apply to payment of bonuses for non-commissionable customers and customers referred to as “Governmental Entities” in the UnitedHealthcare Agent/Agency Agreement. We require written customer acknowledgment and approval before paying bonuses on all non-commissionable customers, and on commissionable governmental entity customers. Any limits on compensation in the RFP, RFI, bid specifications or other written instructions for governmental entities cannot be exceeded. Please refer to the Producer Compensation Policies and Practices in the Producer Performance Guide for more information.

All terms and conditions of the UnitedHealthcare Agent/ Agency Agreement and the Producer Performance Guide apply to all compensation programs. This Bonus Program is offered at the sole discretion of UnitedHealthcare and can be terminated or modified by UnitedHealthcare at any time and without notice.