



California

# New sales and retention bonus

For new fully insured or level-funded medical cases with up to 100 eligible employees



UnitedHealthcare is offering a bonus to agents in California who sell new fully insured or level-funded medical groups with up to 100 eligible employees with effective dates of April 1, 2022, through March 31, 2023.

Eligible groups are new fully insured or level-funded medical groups with up to 100 eligible employees in California that have effective dates of April 1, 2022, through March 31, 2023, and at least 10 employees enrolled for UnitedHealthcare medical coverage. Only agents permanently located in California are eligible for the bonus.

**New sales bonus:** California agents who meet the qualification requirements of this bonus will receive a bonus of \$100 for each enrolled employee in eligible medical groups sold during the bonus period.

**Renewal bonus:** An additional bonus of \$100 per enrolled employee will be paid if a group that receives the new sales bonus renews coverage the following year. Another bonus of \$100 for each enrolled employee will be paid if the group renews coverage again in the subsequent year.

**Bonus example:** An eligible agent sells an eligible medical group with 60 enrolled employees with an original effective date with UnitedHealthcare of March 1, 2023. That makes the agent eligible for a new sales bonus of \$100 for each enrolled employee, so they earn a new sales bonus of \$100 times 60 employees, or \$6,000.

This group renews fully insured medical coverage on March 1, 2024, with 65 enrolled employees and is active on March 31, 2024. The agent will receive a 2024 renewal bonus of \$100 times 65 employees, or \$6,500.

The same group then renews fully insured medical coverage on March 1, 2025, with 70 enrolled employees and is active on March 31, 2025. The agent will receive a 2025 renewal bonus of \$100 times 70 employees, or \$7,000.

| Program              | Bonus paid      |
|----------------------|-----------------|
| 2023 new sales bonus | \$6,000         |
| 2024 renewal bonus   | \$6,500         |
| 2025 renewal bonus   | \$7,000         |
|                      | <b>\$19,500</b> |

## Program details

1. Only Agents of Record permanently located in California are eligible for this program.
2. To be eligible for this bonus program, a group must be a new UnitedHealthcare fully insured or level-funded medical group that:
  - a. Has up to 100 eligible employees;
  - b. Has at least 10 employees enrolled for UnitedHealthcare medical coverage;
  - c. Has original effective dates with UnitedHealthcare from April 1, 2022, through March 31, 2023, and
  - d. Is permanently located in California
3. All sold business must be active and the selling agent must remain the Agent of Record on March 31, 2023, to be included in the New Sales Bonus calculations.
4. Only groups that qualify for the New Sales bonus as detailed above are eligible for the Renewal Bonus payments.
  - a. To be included in the first Renewal Bonus calculation the eligible renewing business must have an active UnitedHealthcare fully insured or level-funded medical group, and the original selling agent must remain the Agent of Record, on March 31, 2024.
  - b. To be included in the subsequent Renewal Bonus calculation the eligible renewing business must have an active UnitedHealthcare fully insured or level-funded medical group, and the original selling agent must remain the Agent of Record, on March 31, 2025.
5. 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 or renewal date for the applicable year. UnitedHealthcare's determination of group and enrolled employee count is final.
6. Classification as a group "with up to 100 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.
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, enrolled employee credit for payment calculations will be allocated in the same proportion as the commissions are split on the case. Fractional credits will be used in the calculation, and credits will not be rounded to the nearest integer. Full enrolled employee credit will be given for meeting the "have at least 10 employees enrolled for UnitedHealthcare medical coverage" requirement.
9. General Agents are not eligible for the bonus.
10. Cases transferring into the up to 100 eligible employee segment from another UnitedHealth Group subsidiary, business segment 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

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.