

New Producer Licensing & Appointment Checklist

Sales offices are responsible to ensure that all producers—both internal and external—are properly licensed and appointed in each state in which UHC business is sold. Please use this checklist to ensure that each producer who wants to establish a relationship with UHC and solicit and negotiate business for the company has submitted the correct information to become appointed by UHC.

Please submit appointment paperwork to Producer Credentialing when the external producer begins quoting business to ensure that commissions payments will not be delayed.

- Agent/Agency Agreement**
Each external producer (internal producers do not need to sign an agreement) must sign an Agent/Agency Agreement. If an agent works for an agency that is also seeking an UHC appointment, a separate agreement must be completed and signed by the individual agent and agency representative. **Reminder: Local Sales Vice Presidents must countersign the agreement to make it valid.**
- Request for Appointment of Insurance Producer Form (RFA)**
Individual and business entity producers seeking UHC appointment must complete and submit the RFA. (Please use the correct RFA depending on whether the producer is internal or external to UHC.) Check that all information on the form is complete, accurate, and legible.
- Florida Non-Resident County Appointment Form**
Agents who are non-residents of Florida and who physically enter the state of Florida to conduct business must be appointed in each county in which they enter.
- Compensation Assignment Form**
External producers seeking to assign commissions to an individual or business entity other than themselves must complete and submit the Compensation Assignment Form.
- License Copies**
All producers (internal and external) seeking UHC appointment must provide a current copy of their Accident, Life, and Health (or equivalent) license for each state in which they want to sell UHC products.
- Direct Deposit Authorization/Maintenance Form (Mandatory for All Payees)**
Commissions payments will be electronically deposited in the bank account of the payee's choice. All new producers must complete and submit the Direct Deposit Authorization/Maintenance Form.

Send all completed forms and license copies to the Credentialing Analyst in Producer Credentialing who is assigned to the resident state in which the producer is seeking appointment. Appointment information may be faxed, emailed to appointment_credentialing@uhc.com, or mailed.

Fax #: (860) 221-0069

**United Healthcare—Producer Credentialing
400 Capital Blvd, FL 2
Rocky Hill, CT 06067-3576**