



Manager Orientation

WESTMED Practice Partners

June 11, 2019



Today's Speakers

- **Renee Ruffin**
Human Capital Partner
- **Melissa Gonzales**
Human Capital Partner
- **Kathleen Hesseltine**
Total Rewards, Compensation

Welcome!



You will attend the employee orientation for information about benefits, pay and more

- Onboarding Resources
- Our company
- Human Capital service delivery model
- Manager responsibilities
- Pay and time reporting
- Compensation
- Performance management
- Learning
- Onboarding Activities

Onboarding Resources

What to Expect from your Transition Team

The support and information you'll need for a smooth, successful transition.

- Customized Website for WPP Transition
 - FAQs (updated regularly as needed)
- Regular Transition Update Emails
- Virtual Office Hours – Thursdays beginning June 20
- Employee Orientation
- Onboarding Process
 - FLSA Employment Status and Comp Change Talking Points
 - Employment Transition Letter
 - Background Check
 - Onboarding Checklist
 - Form I-9 Completion
 - Enrollment Reminder Emails After Transition

Your Journey to Optum360 – WPP Transition Website

The place to go for transition related information.

Here is where you'll find all the information you need to get you and your employees through the human capital transition



Access on the Internet

<https://welcome.optum360.com/westmed>

Manager Only Link

<https://welcome.optum.com/content/ma/westmed/en/managers.html>



Password (case sensitive)


WPP2019!

- Journey Map
- Our Companies
- Total Rewards and Resources
- FAQs
- Key Dates
- Our Values and Culture
- Communications Archive/Transition Updates
- Employment Transition Questions Email Box

Onboarding Checklist



Give employees time to complete courses and other onboarding activities

 **Onboarding Checklist**

For WESTMED Practice Partners employees joining Optum360 in the U.S. on July 21, 2019

Please use this checklist daily during your first weeks as an employee. You will want a copy of the [WPP Login Instructions](#) found under *Quick Links* on the WESTMED Practice Partners (WPP) transition website (WPP2019! is the case-sensitive password) to complete most of these activities, so please have the instructions close by and log in first.

Dates and Information	Instructions
<input type="checkbox"/> July 19, 2019 (after business hours) Receive your systems access credentials via two separate emails from No Reply Necessary-Secure@UHG.com with the subject line <i>IMPORTANT System Credentials</i> . Your credentials give you access to the UnitedHealth Group applications you will use to complete your I-9, report your time, and more. Your credentials give you access to the UnitedHealth Group applications you will use to complete your I-9, report your time and more. Follow the WPP Login Instructions on the WPP transition website and log in to the UnitedHealth Group network.	<p>These credentials are your:</p> <ul style="list-style-type: none">• Employee ID• MS ID• MS initial password <p>If you do not receive these credentials by Sunday, July 21 or Monday, July 22 (if you are working those days), or by Tuesday, July 9, call the Technology Support Center (Optum's Help Desk) at 1-888-848-3375.</p>

Your guide for onboarding tasks in the first 30 days

- Benefits enrollment dates
- I-9 due date
- Payroll dates
- And more

Posted on the onboarding website on July 19

Our Company

UNITEDHEALTH GROUP

Ranked **5th**
of the Fortune 500

\$226B
FY18 revenue



Health Benefits

A diversified enterprise with
complementary but distinct
business platforms



Health Services



WESTMED Practice Partners

OUR MISSION

Helping people live healthier lives and helping make the health system work better for everyone

OUR VALUES

Integrity

Compassion

Relationships

Innovation

Performance

Optum360



End-to-End
Revenue
Cycle
Mgmt.

Managed
Services

Technology

Consulting

11,000+

Highly skilled staff
focused on:

- Patient Access
- Health Information Mgmt.
- Patient Financial Services
- Health Technology Innovation
- Systems Implementation
- Advisory Services, including ICD-10



2500+
FACILITIES

using revenue cycle services

\$65B



Managed Billings

Technology solutions for



1600
CLIENTS



450

**Managed
Services Clients**

4 OUT OF 5

**U.S Hospitals use
Optum360 Products
and Services**

Human Capital

Our term for Human Resources. We emphasize self service and provide resources to help.

UnitedHealth Group Human Capital Service Delivery Model



Human Capital is broken out into three main categories to support the organization

HRdirect/ Self Service

- ✓ Answer HR questions
- ✓ Process transactions
- ✓ Resolve issues

Human Capital Partners & Consultants

- ✓ Organizational design
- ✓ Employee engagement and retention activities
- ✓ Team building
- ✓ Leader and employee development

Centers of Expertise (COEs)

HRdirect Contact Center

We promote a self-service model

Submit an online question/use
online chat through The Hub

Call HRdirect at 800-561-0861



Access beginning
July 21, 2019



Manager Employee Relations urgent questions

Use Option 0, 3, 1



Report a One Breath emergency

Use Option 0, 3, 1

Human Capital Partners & Consultants (HCPs and HCCs)

A group of business advisors and change agents

Strategic support for managers

- Identify, develop and implement HC strategies
- Broker services from HC Centers of Excellence in support of the business
- Foster employee engagement
- Enhance workforce capability
- Create a performance culture

Human Capital Centers of Excellence

A group of business advisors and change agents

Human Capital **subject matter experts** in specialized areas:



Talent
Acquisition



Talent
Development



Total
Rewards



Workplace
Strategy &
Analytics







Human
Capital
Services


Accessing HRdirect/ Self Service




Access beginning
July 21, 2019

 UnitedHealth Group  Optum  UnitedHealthcare


 Hello, Mary | MN008 | United States ▾ | UNH \$221.75 +4.91





[Our Culture](#) [Manager Center](#) [Pay & Benefits](#) [Policies](#) [Career & Learning](#) [Technology Services](#) [Resources](#) [Customize Dashboard](#)


News for Optum ([Change](#)) [View All News](#)



Memo from Ellen Wilson
Your Voice Matters.


Your Voice Matters – Your Opportunity to Provide Meaningful Feedback

Our Chief Human Resources Officer Ellen Wilson introduces a new approach for gathering your feedback.




CEO Conversation
VIDEO REPLAY

A Conversation with Andrew Witty




Uninstall Unused Software From Your Devices




RECAP ALL UNITEDHEALTH GROUP TOWN HALL
Hosted by Dave Wichmann, Chief Executive Officer, UnitedHealth Group

Watch the Highlights: All-Employee Town Hall




Memo from Dave Wichmann
CEO, UnitedHealth Group

Thank You for a Strong Start to 2019



Virtual Treatment Program Launching

Alcohol Awareness Month: Expanding Access to ...



stride Jinger's Journey

Jinger's Journey to Healthy Living

The Hub Menus



Access beginning
July 21, 2019

Our Culture **Pay & Benefits** Policies Career & Learning

Time & Pay <ul style="list-style-type: none">Time Reporting InformationPay InformationTax FormsCompensationPay and Holiday Calendars	Benefits <ul style="list-style-type: none">Life Events<ul style="list-style-type: none">Personal InformationMarriage & Domestic PartnershipsIllness & DeathBaby, Adoption & GuardianshipEmployee Assistance ProgramEmployee Discount Site<ul style="list-style-type: none">Discounts OverviewDiscounts Overview – Optum360
---	---

HR Transactions

- Global Self Service
- Report Your Time
- View Paycheck

Benefits Policies **Career & Learning** Technology Services Resources

Careers <ul style="list-style-type: none">Know YourselfDiscover RolesDevelop YourselfApply for a JobEmployee Referral	New Employees <ul style="list-style-type: none">During First DayWithin First WeekWithin First MonthWithin First 90 Days
Learning <ul style="list-style-type: none">Featured Learning CatalogLearnSource	Performance & Goals <ul style="list-style-type: none">Values Based CompetenciesCoachingGoalsCommon Review

Benefits **Policies** Career & Learning Technology Services Resources

Human Capital <ul style="list-style-type: none">Compliance & EthicsEmployee HandbookEmployee VolunteeringHiring & EmploymentLeaves & DisabilityPersonal ConductTime & AttendanceWorkplace Policies	Brand & Communications <ul style="list-style-type: none">Governance, Risk & Compliance Policy Center (eGRC)<ul style="list-style-type: none">Business Policies & ProceduresInformation Security Policy & StandardsSocial MediaTravel & Expense
--	---

The Hub's Global Self Service



Access beginning
July 21, 2019

Report & Approve Time

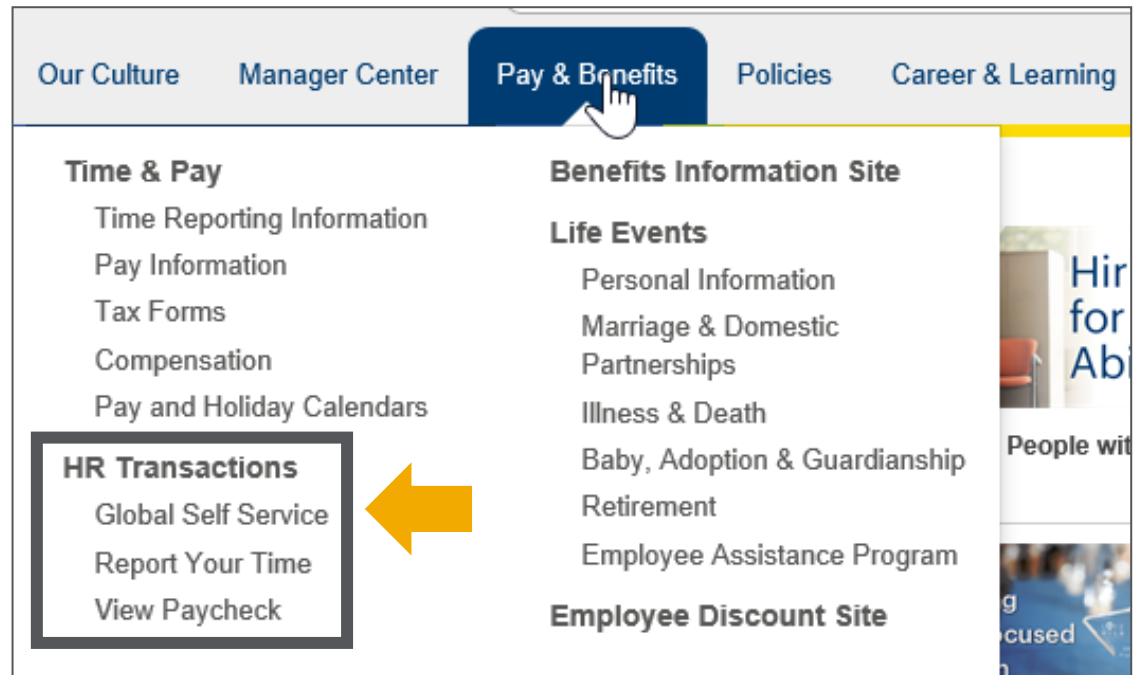
Personal Info

Report PTO

View Paycheck

Performance Review

And More!



The Hub: Manager Center



Access beginning
July 21, 2019

UnitedHealth Group Optum UnitedHealthcare 0

Search people, news, group

[Our Culture](#) **Manager Center** [Pay & Benefits](#) [Policies](#) [Career & Learning](#) [Technology Services](#) [Resources](#)

Manager Calendar
Manage the Work

- Time & Leave
- Pay & Compensation
- Workplace Issues
- Work Arrangements
- Terminations
- GSS Actions

Common Review

Lead Others

- Hire Talent
- Orient New Employees
- Develop Team

Develop as a Leader

- Common Language of Leadership
- Leadership Profile 2.0
- New Manager Roadmap
- Take Action on Vital Signs Results
- Tools & Resources

Health Alliance
eliminary P...

EMPLOYEE REFERRAL PROGRAM
Refer Your Talented Friends for a Job

Optum Gig
m is Thinking

Academic Partnerships
Optum and UnitedHealthcare

Riverside
Your family's complete medical home

OptumCare's RMG Recognized by NJ C

AWARD RECOGNIZES PARTNERSHIP
Program Helps Min...

Manager Responsibilities

We're here to help. Learn about the employment cycle, Form I-9s and Background Checks.

Form I-9

Employment Eligibility and Verification

- **Employee**
 - Review list and gather acceptable documents
 - Advise of PTO
 - Finish/submit Section 1
 - Change approver if instructed
- **Manager**
 - Communicate process
 - Convey PTO/designated approver
 - Examine documents
 - Complete and approve Section 2
- **Other Designated Approvers**
 - Examine documents
 - Complete and approve Section 2 of Form I-9
- **Employee Relations**
 - Monitor I-9 compliance
 - Partner with Human Capital project team on questions, etc.

Form I-9

All company employees must complete a Form I-9

- Employee completes section 1
- Manager/designated approver completes section 2

Complete and approve Form I-9 between July 21 and July 25 by 3 p.m. CT

Employment will be terminated if this deadline is not met

You'll follow these same steps with future new hires



Complete instructions and FAQs are on your transition website.

Employment Cycle

There are three stages to the employment cycle.

Pre-Employment

- Requisition creation and approval
- Posting
- Sourcing
- Interview and selection
- Offer letter
- Employment screening
(background, drug, TB test)
- Systems access request

Employment

Start Date

New Hires

- Complete Form I-9
- Complete orientation checklist (The Hub)

Ongoing

- Performance Mgmt.
- Common Review
- LearnSource
- Annual background check

Termination

Voluntary

- Employees use The Hub

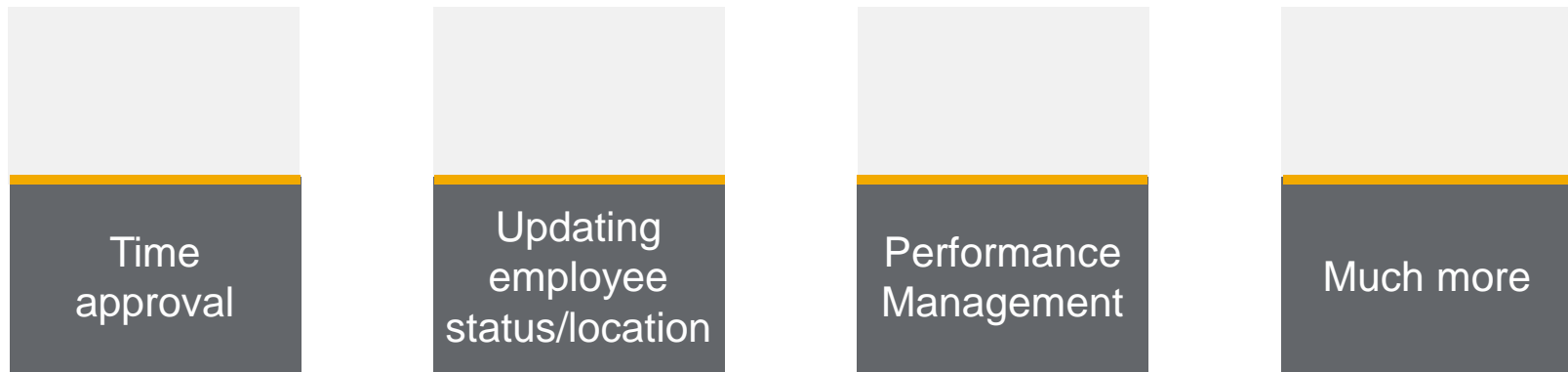
Involuntary

- Manager contacts HRdirect

Required Manager Actions

UnitedHealth Group takes a self-service approach to many manager functions

These functions include



Learn more on the Manager Center on The Hub

Manager Center on The Hub



Access beginning
July 21, 2019

UnitedHealth Group Optum UnitedHealthcare

1 Hello, Mckenna | MN008 | United States ▼ | UNH \$237.07 -2.00

Search people, news, groups, expertise and information

Our Culture Manager Center Pay & Benefits Policies Career & Learning Technology Services Resources

Manager Center ▼
[Develop As A Leader](#) >
[Lead Others](#) >
[Manage the Work](#) >
[Manager Calendar](#)

Manager Center

The Manager Center is your destination to find current Human Capital news, required actions to take as a manager and important resources to help you support your employees to foster development and drive business results.

News for Managers

Tara Thorson modified **Complete Performance, Compensation & Development Conversations by Feb. 19** in **Manager Center News**
2 weeks ago

Have you completed your performance reviews and compensation conversations with your team? You hav..[read more](#)

0 1

Resources For Leaders

Manage the Work
Resources for actions you need to take as a manager.

Annual Core Processes –

An overview of the core processes for managers



- Set business goals
- Plan employees goals and development
- Communicate performance

- Execute action plan and communication
- Performance and development plan check

- MAP tool opens/MAP ratings
- Plan employee compensation

- Performance and development plan checkpoint

Pay

Payroll Schedule, Time Reporting and
Paid Time Off

U.S. Payroll Schedule

UnitedHealth Group pay cycle

- Paid biweekly
- One week in arrears
- WPP and UnitedHealth Group pay cycles are the same – no gap in the timing of your paychecks at transition
- **July 26, 2019:** Final check from WPP covering July 7 – 20
- **Aug. 9, 2019:** First UnitedHealth Group check covering July 21 – Aug. 3



The payroll calendar is located on the onboarding website.

July 2019							August 2019						
S	M	T	W	T	F	S	S	M	T	W	T	F	S
	1	2	3	4	5	6					1	2	3
7	8	9	10	11	12	13	4	5	6	7	8	9	10
14	15	16	17	18	19	20	11	12	13	14	15	16	17
21	22	23	24	25	26	27	18	19	20	21	22	23	24
28	29	30	31				25	26	27	28	29	30	31

Time Reporting and Payroll



Take the manager training
on The Hub.



Employees

Enter time through The Hub

- **Non-exempt:** report time every day, up-to-the-minute
- **Exempt:** report exception time only
- **Deadline:** Monday before payday **by 12 pm CT**



Managers

Approve time through The Hub

- Review and approve time each payroll cycle
- You may delegate time approval
- **Deadline:** Monday before payday **by 6 pm CT**
- Employees will be paid even if time is not approved

Paid Time Off

What you need to know about PTO and how to handle as a manager



Access beginning
July 21, 2019

Learn about the
PTO Policy

Approve PTO

Approve Borrowed
PTO

The screenshot shows the 'the hub' portal for UnitedHealth Group. The top navigation bar includes logos for UHG, Optum, and UnitedHealthcare, along with a user profile for 'Hello, McKenna' and a balance of 'UNH \$238.40 -2.67'. A search bar is located on the right. The main navigation menu includes 'Our Culture', 'Manager Center', 'Pay & Benefits', 'Policies', 'Career & Learning', 'Technology Services', and 'Resources'. The 'Manager Center' dropdown menu is open, showing options like 'Develop As A Leader', 'Lead Others', 'Manage the Work', 'GSS Actions', 'Pay & Compensation', 'Terminations', and 'Time & Leave'. The 'Time & Leave' section is highlighted, showing 'Leave & Pay' and 'Time & Attendance'. The main content area is titled 'Paid Time Off (PTO) - United States' and contains the following text: 'The information below pertains to managers with direct reports in the United States. In addition to understanding the base policies for PTO, there are some special considerations that you need to be able to handle as a manager. Review PTO Policies Familiarize yourself with the basics of these policies for the US:'. A list of links is provided: 'Paid Time Off (PTO)', 'Paid Time Off (PTO) - California Employees', 'Purchasing Additional Paid Time Off (PTO)', 'Time Off Donation Bank', and 'Manager's Guide to Employee Relations Issues - See the section on Managing Time Away from Work (TAFW)'.

Employees will no longer need to request PTO online, but will need to get manager approval.

Compensation

Competitive Compensation

UnitedHealth Group attracts and retains top talent **like you** through competitive compensation.



We **compensate** our team members competitively



We **reward** top performers through incentives



We **pay for performance** so you can make a real impact on your total compensation

What May be New for Managers



We share our **salary ranges with our employees.**

Acquired employees may fall below or above salary ranges.
This will spur new discussions.



Managers must work with Human Capital and Compensation to change employee's **system titles.**

You may change business titles (business cards)



Salary increases require a **review process.**

Our Framework of Fixed and Variable Compensation



Select managers play a role in determining merit, variable pay and equity awards

All team members receive base pay

Base Pay

All team members have a variable pay component

Rewarding Results Plan (RRP) Annual Award

Quarterly Variable Compensation (QVC)

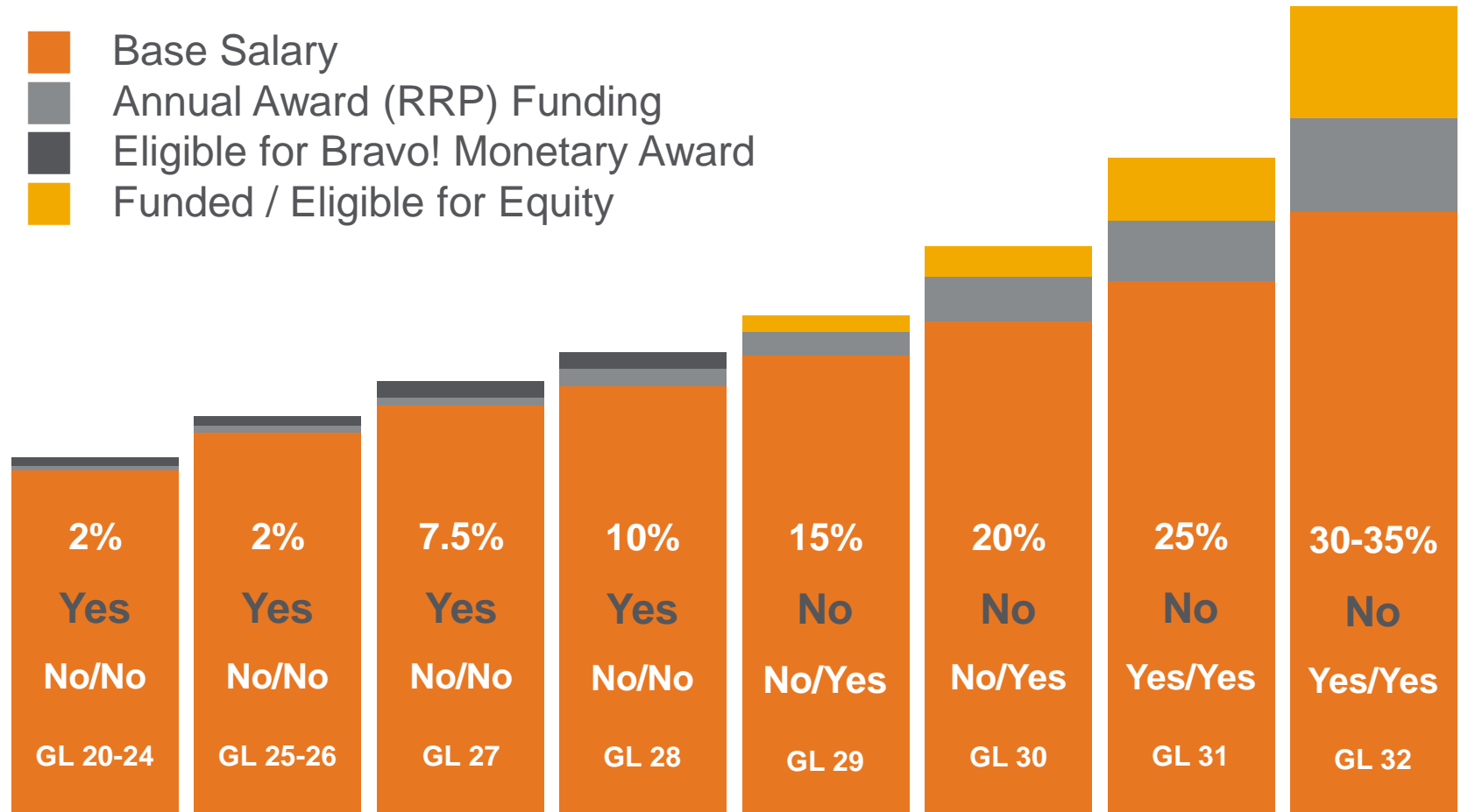
Sales Incentive Plan (SIP)

Grades 21-28

Bravo! Monetary Awards

If you are a contact center representative or supervisor currently on a WPP contact center incentive plan, you will remain on that plan through 2019.

As Salary Grades Increase, the Pay Mix and Earnings Potential Grows

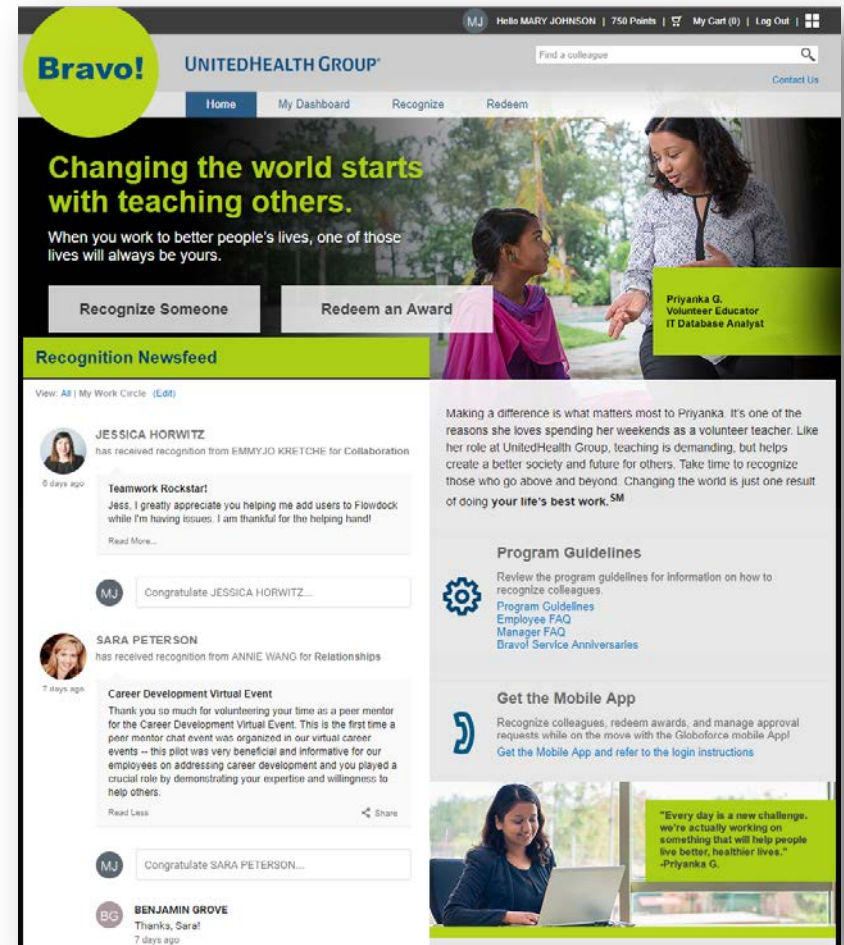


Culture of Recognition: Bravo!

Recognition delivered in a consistent, meaningful and timely way

Recognize a peer, colleague, direct report or your manager through the Bravo! website or mobile app.

Service anniversaries can be celebrated through Bravo!



Performance Management

Performance Management

As a manager, you play an important role in how your employees develop and perform

Set, focus and execute goals

Use values-based competencies

Coach performance

Support employee development

Reward performance



Learning

Learning Resources

LearnSource is our learning management system

- Contains 20,000 classes

SkillSoft

- 3,700 SkillSoft courses you can access via LearnSource
- Courses will be charged to employee's GL
 - 36 free SkillSoft courses available
- Manager approval required

Post-Integration Human Capital Manager Training

Managers will receive additional onboarding training post-integration

Talent

- Requisition and Governance Process

Employee Relations (ER)

- Handling Employee Relations Issues
- Correction Action Process (CAP)
- Leave and Accommodations Training

Required Learning

Employee Courses	Days to Complete	Length
Time Reporting for Employees - US	30	15 min.
ERIM and You	30	30 min.
Sexual and Other Harassment: Our Expectations for a Respectful Workplace	30	60 min.
Workplace Violence Prevention Course	30	45 min.
C&E@Work Lesson - Intellectual Property	60	45 min.
Valuing Diversity and Inclusion II	120	45 min.
Manager Courses	Days to Complete	Length
Time Reporting for Managers - US	30	15 min.
Sexual and Other Harassment: What Leaders Need to Know	30	60 min.
The Manager's Role in Affirmative Action	60	45 min.
New Manager Orientation II	90	20 min.
10-Minute Tips: Behavioral Interviewing Skills Overview	90	10 min.
FLSA	180	60 min.

Required Learning Notices

Required learning notices

- You and your employees will receive many notices
- Ask them to focus on the deadlines and file notices for future use
- Remind them to use the Internet links in the messages to take training



Give employees time to complete courses and other onboarding activities

IT Systems and Access

Accessing UnitedHealth Group Systems,
Accessing Links in Emails and
Secure Access Requests

Accessing UnitedHealth Group's Network

Keep using your existing log in credentials, systems and application for day-to-day business

You must login to UnitedHealth Group systems to complete many actions

To access The Hub, you must log in via Citrix

- System credentials will be sent to all by July 21
- On Demand Access (ODA) Tokens will be set up by employees at their first login

Login instructions found on onboarding site on July 19

Accessing Links in Emails

Some links may require you to be logged into the UnitedHealth Group network

You will begin receiving many messages from UnitedHealth Group and Optum or UnitedHealthcare (i.e. secure@optum.com)

These emails may contain links into UnitedHealth Group's systems

- These links do not work outside the network

To access the links, log into UnitedHealth Group's system then cut and paste the link into your browser

Secure Access Approval Email



Complete Secure requests by the due dates or your employees will lose system access

Open a Citrix session and paste links into your browser

An Access Review has been initiated for **JENNIFER SLOPE**.
Completion of this Access Review is due by **12/20/2018**.

To complete this review click on the below Access Review ID:

Note: Action on this request ONLY needs to be completed by the Manager or Approval Delegate(s).

Access Review ID:	465521
Access Review Reason:	New employee
Manager:	CAROLYN THOMAS

Approval Delegate(s):

You may also visit **Secure's** [Access Review Dashboard](#) to view all Access Reviews to which you have been assigned.

For instructions you can refer to the [Secure Access Review User Guide](#) or take the "**Secure** Access Review Training" course through LearnSource.

By completing the Access Review, you ensure your team member will continue to have access to the tools and resources they require to perform their duties.

Please submit questions to [Access Administration Related Questions](#).

Thank you,
Identity Access Management Team

Onboarding Activities

Telecommuter Agreements

Sent to anyone with a telecommuter status after July 21, 2019

- Employee should complete agreement
- Manager and a second manager must sign off



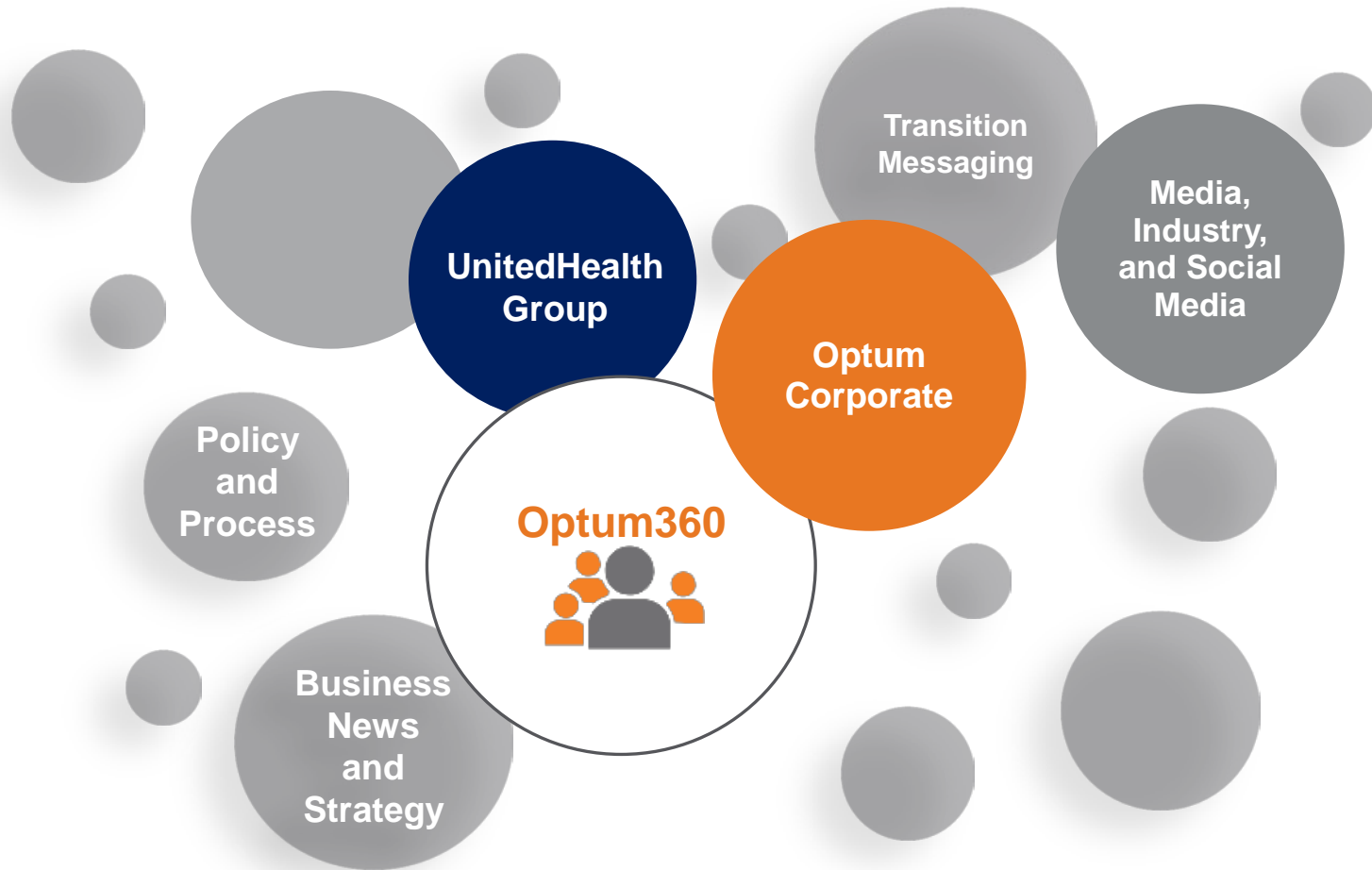
Direct manager and a second manager must sign off

Annual attestation

- Each year managers must confirm that the employee still qualifies as a telecommuter

Welcome to the Optum Family

You'll begin receiving company communications July 21, 2019



**If you have an Optum360 email address now,
remember that we send all company communications to that address**

What to Expect Next



Attend the employee orientation for information about benefits, pay and more

Visit the onboarding site often during this period for up-to-date information

Date	Action Item
June 20	<ul style="list-style-type: none">• Employment Transition Ltr – Compensation & Grade• Background Check email
Week of July 15	<ul style="list-style-type: none">• Employee Orientation
July 19	<ul style="list-style-type: none">• Onboarding checklist available
July 21	<ul style="list-style-type: none">• First day as an employee of UnitedHealth Group employee• Receive system credentials
July 22	<ul style="list-style-type: none">• First time login• Complete Form I-9
July 22 – Aug. 20	<ul style="list-style-type: none">• Enrollment period for UnitedHealth Group elected benefits

A background image showing a female doctor in a white coat with a stethoscope, smiling and looking down at a young woman who is holding a baby. The woman and baby are also smiling. The scene is set in a clinical or hospital environment.

Thank you.

Statements made herein are general summaries. UnitedHealth Group reserves the right to amend, modify, or terminate the benefits discussed herein at any time. If there are any differences between the official plan document for any benefit plan and this summary, the official plan document governs. See the 2018 Benefits Handbook on the Hub for plan provisions. Visit the 2019 Benefits Website for 2019 plan details.



