UnitedHealthcare®

2023 Certification User Guide

Table of Contents

6-24-2022
Confidential property of UnitedHealth Group. For Agent use only.
Do not distribute, reproduce, edit or delete any portion without the express permission of UnitedHealth Group.
Page 1

UnitedHealthcare Certification Requirements

To solicit, present or sell any products in the UnitedHealthcare® Medicare Solutions portfolio (m*ay include plans branded UnitedHealthcare, AARP, Erickson, Peoples Health, Preferred Care Networks, Preferred Care Partners, or Rocky Mountain Healthcare)*, you must be **licensed** and **appointed** (if applicable) in the state in which the consumer resides and **certified** in the product(s) you are presenting to and/or enrolling the consumer. To become certified for the plan year, you must successfully pass all the Base Level assessments and the Next Level assessments for the product(s) you wish to sell or events you wish to conduct.

NOTE: While you may proceed directly to each assessment without reviewing the certification content, it is strongly recommended that you review the Certification Study Guide before attempting the assessment.
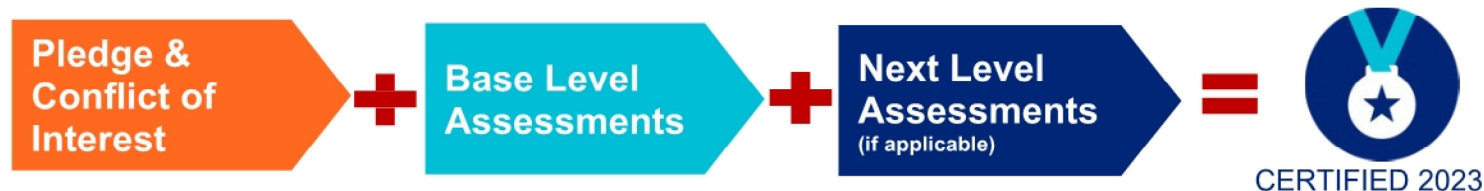
- Review any needed **RECOMMENDED COURSES**, including the **STUDY GUIDE** which contains all the content needed to pass the assessments.

- Complete the **PLEDGE OF COMPLIANCE** and attest to any **CONFLICTS OF INTEREST**.

- Complete all **BASE LEVEL ASSESSMENTS** by passing with a score of **85% or higher within 6 attempts.**

  o Failing any Base Level assessment will block access to any other assessments, and you will not be able to market or sell any UnitedHealthcare Medicare Solutions product for the plan year.
  o Base Level assessments must be taken in order:
    - Medicare Basics*
    - Ethics and Compliance
    - AARP

- Complete the **NEXT LEVEL ASSESSMENTS** by passing with a score of **85% or higher within 6 attempts** or you will not be allowed to sell the applicable product for the plan year.

  o Available Next Level assessments are:
    - Dual Special Needs and/or Chronic Condition Plans (D-SNP/C-SNP)
    - Institutional and Institutional-Equivalent Special Needs Plans (I-SNP/IE-SNP)**
    - Senior Care Options**
    - Events Basics (required for conducting any marketing/sales events)

    * Medicare Basics includes credit for Medicare Advantage Plans (non-SNP), Prescription Drug Plans and Medicare Supplement Insurance Plans.
    **Available by invitation only. These will only appear on your Home Page in Learning Lab if you have been invited to sell these products.

AHIP Certification for our EDC Partners
America's Health Insurance Plan (AHIP) Certification satisfies the requirement for the following UnitedHealthcare Certification assessment: Medicare Basics Assessment (including Medicare Advantage [non-SNP], Prescription Drug and Medicare Supplement Plans). *See page 6 for instructions.*

A summary of the steps to certify is as follows:

Step 1: Review any RECOMMENDED courses needed such as the STUDY GUIDE

Step 2: Complete the REQUIRED Pledge of Compliance and Conflict of Interest

Step 3: Complete all 3 REQUIRED Base Level Assessments

Base Level

I want to sell or conduct:

I must pass these assessments:

Medicare Advantage Plans non-SNP (MA non-SNP)
UnitedHealthcare, AARP, Erickson, Peoples Health, Preferred Care Networks, Preferred Care Partners, or Rocky Mountain Healthcare branded HMO, POS, PPO and PFFS plans

AARP Prescription Drug Plans (PDP)

AARP Medicare Supplement Plans

Successfully pass all 3 Base Level assessments:
- Medicare Basics* (or transfer AHIP passing score)
- Ethics & Compliance
- AARP

*Medicare Basics includes credit for Medicare Advantage Plans (non-SNP), Prescription Drug Plans and Medicare Supplement Insurance Plans.

Step 4: Complete any Next Level Assessments

Next Level

I want to sell or conduct:

I must pass these assessments:

Dual Special Needs Plans and/or Chronic Condition (D-SNP/C-SNP)
UnitedHealthcare, Preferred Care Networks, Preferred Care Partners, and Erickson

Successfully pass all Base Level assessments **AND** Dual Special Needs Plans and Chronic Condition (D-SNP/C-SNP) assessment

Events Basics
To conduct marketing/sales events, host a retail kiosk, or conduct a community meeting

Successfully pass all Base Level assessments **AND** the Events Basics assessment

Institutional and Institutional-Equivalent Special Needs Plans (I-SNP/IE-SNP)

Successfully pass all Base Level assessments **AND** Institutional and Institutional-Equivalent Special Needs Plans (I-SNP/IE-SNP) assessment
(available by invitation only)

Senior Care Options
UnitedHealthcare

Successfully pass all Base Level assessments **AND** Senior Care Options assessment (available by invitation only)

6-24-2022
Confidential property of UnitedHealth Group. For Agent use only.
Do not distribute, reproduce, edit or delete any portion without the express permission of UnitedHealth Group.
Page 3

1 From Jarvis, click on the **certification path link near the top of the screen** (in the news article scroll). This will take you directly to Learning Lab and the courses you need to complete for certification.
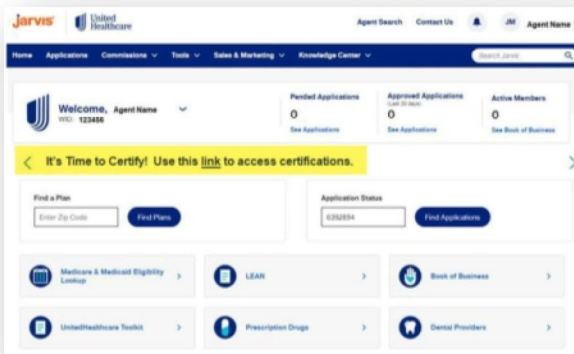
(Spanish is also available once you enter the Learning Lab path.)

Field Sales Agents:

Before you begin your certifications, decide if you are taking your certifications entirely via <u>UnitedHealthcare</u> *modules* **OR** *if you will be using a combination of* <u>AHIP</u> *and UnitedHealthcare courses.*
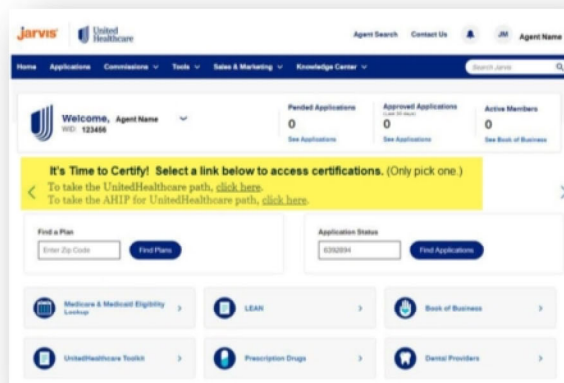
Telesales and Multi-Carrier Call Center agents:

If you don't see the article, go to the **Knowledge Center** tab on the top bar. Then click on Learning Lab. That will open Learning Lab and you can search for 2023 Certifications.
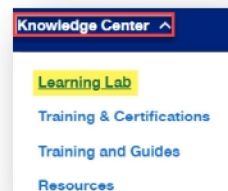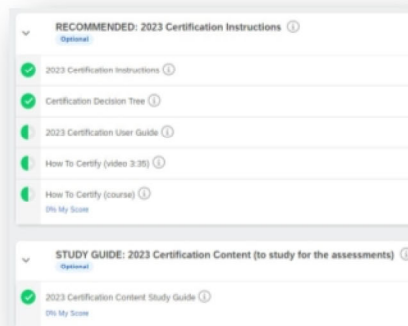
Then select the learning path you need to complete (only complete one path).

2 When the path opens in Learning Lab, you will find some RECOMMENDED courses. These are optional but highly recommended.

There is a **Study Guide** where you'll find all the content you need to know to pass the assessments.


3 Complete all the REQUIRED courses:

- Pledge of Compliance, Conflict of Interest, and
- the 3 Base Level Assessments (Medicare Basics, Ethics & Compliance, and AARP).

Six attempts* are allowed on each assessment.

Completing the Pledge of Compliance and the Conflict of Interest (COI) and successfully passing all 3 base level assessments with 85% or higher passing score will certify you to sell Medicare Advantage (non-SNP), Prescription Drug, and Medicare Supplement Plans.
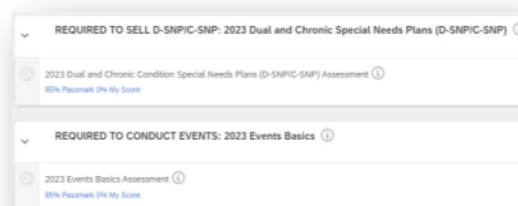
An attempt is counted when you complete the assessment or if you restart a previous attempt.
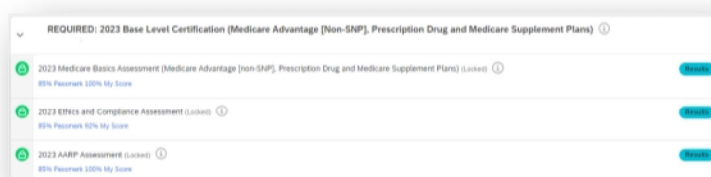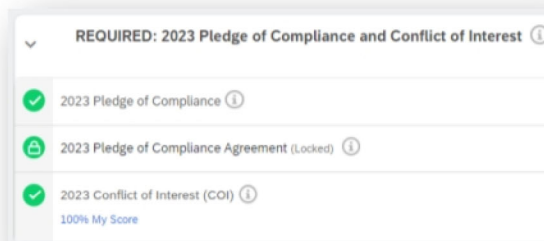
4 Complete any Next Level assessments if you wish to certify to sell more than the base level.

For example, if you want to sell D-SNP and/or C-SNP, complete that assessment; if you want to conduct any marketing events, complete the Events Basics assessment.

If you have been invited to sell any other products, those assessments will appear on your Home Page in a separate course.

AHIP Certification Instructions

AHIP Certification is NOT required. Agents choosing to pursue AHIP via UnitedHealthcare are eligible to receive a $50 discount off the first AHIP purchase by using our custom link in Learning Lab.

Per policy, agents choosing to certify via AHIP must obtain a minimum score of 90% within six attempts. Each purchase consists of three attempts (UHC only acknowledges the initial two purchases).

All agents are required to sign the **Pledge of Compliance** and attest to the **Conflict of Interest**. Agents certifying via the AHIP path must transfer a passing AHIP score (via our custom link) and then complete the **Base Level** certification assessments: AHIP, Ethics/Compliance, and AARP. Passing all three will certify you to sell MA (non-SNP), PDP, and Medicare Supplement plans. *(AHIP Certification satisfies the requirement for the UnitedHealthcare Medicare Basics Assessment.)*

Go to www.uhcjarvis.com

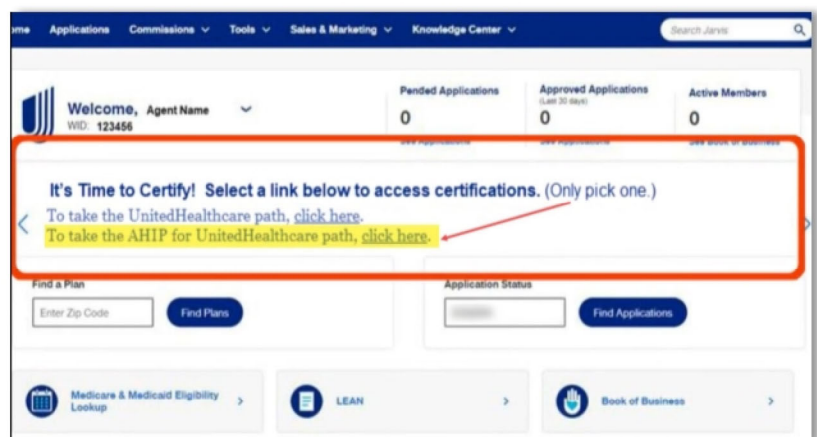Click on **Sign in with One Healthcare ID**.

Enter your **One Healthcare ID** and **Password**.

Click on **Sign In**.

From Jarvis, click on the **AHIP certification path link near the top of the screen** (in the news article scroll). This will take you directly to Learning Lab and the courses you need to complete for certification.
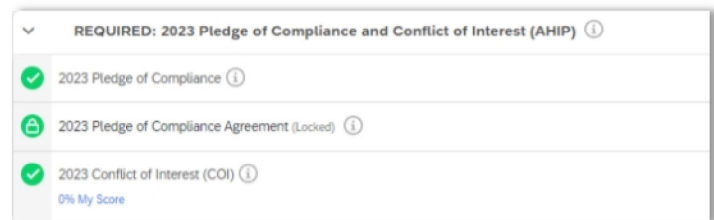
If you don't see the article, go to the **Knowledge Center** tab on the top bar. Then click on **Learning Lab**. That will open Learning Lab and you can search for 2023 Certifications.

Then select the learning path **2023 UnitedHealthcare Certifications for AHIP**.
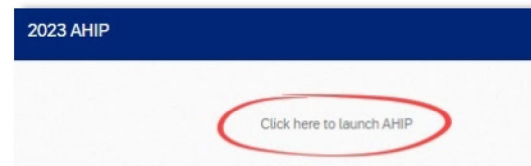

Complete the **Pledge of Compliance and Conflict of Interest**.


Click on the **2023 AHIP** module.

Click on the link **Click here to launch AHIP**.

A new tab will open up allowing you to log in with your **AHIP UserName** and **Password** OR register if you are a new AHIP user.

Important: Pay close attention to the website masthead because it confirms you are entering the UnitedHealthcare site license by displaying the UnitedHealthcare logo in the upper right-hand corner of the screen.
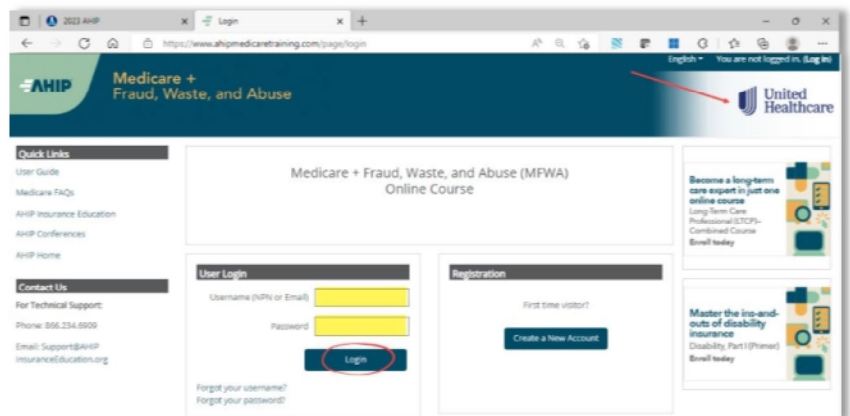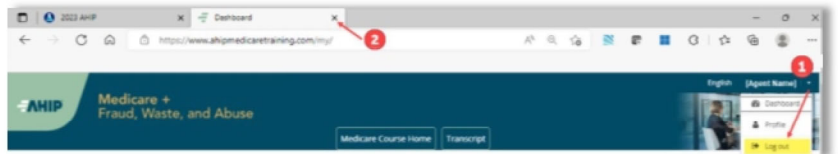

A pop-up message will appear to confirm you are active in the UnitedHealthcare site license, click **Continue**.
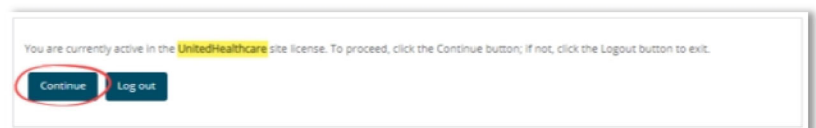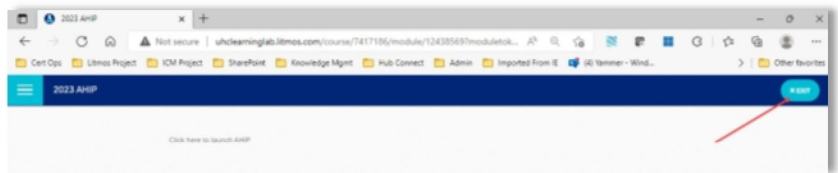
On the **Medicare Course Home** tab, scroll to the bottom of the screen to click the **UnitedHealthcare (Transmit)** link to send your results to UnitedHealthcare.
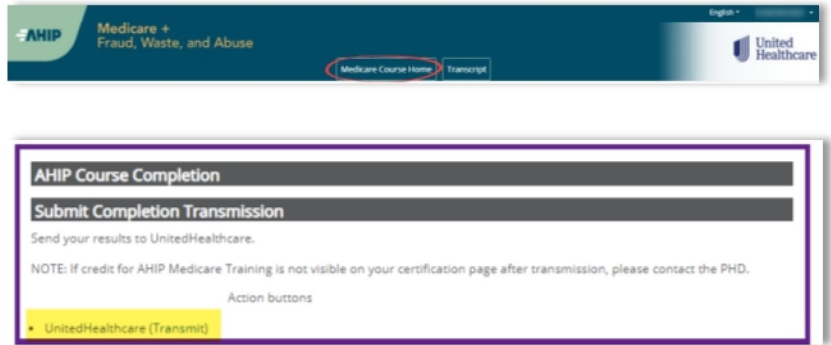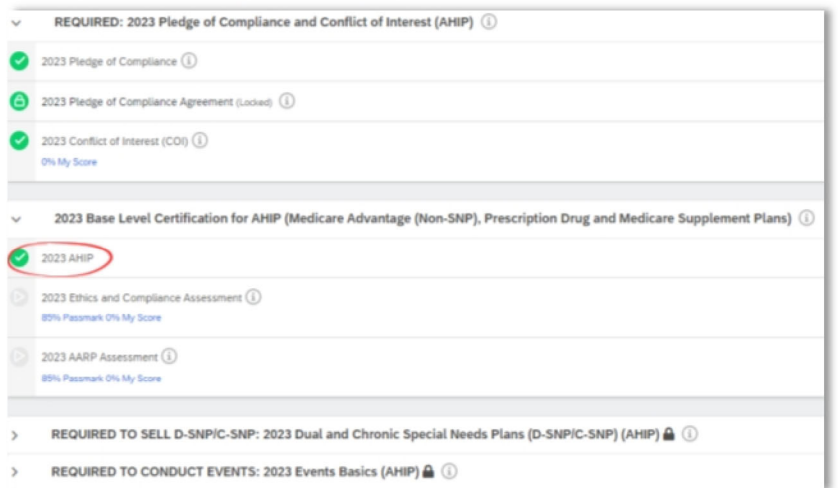

Log out of your AHIP account and close the AHIP tab.

On the Learning Lab tab click the **EXIT** button to return to the main page where the 2023 AHIP will appear completed upon successful transmission.

Proceed with completing the remaining **REQUIRED Base Level** assessments as well as any **Next Level** assessments if you wish to certify to sell more than the **Base Level**.

REMINDER: *For agents choosing to complete the 2023 AHIP, either directly from the AHIP website or through another carrier, you are still required to follow the above directions in order to transmit your results to UnitedHealthcare and receive credit for the equivalents. The UHC discount will be forfeited if you choose to certify directly from the AHIP website or through another carrier.*

Logging into Jarvis

Registered Users

- Go to **www.uhcjarvis.com**

- Click on **Sign in with One Healthcare ID**

Welcome to Jarvis
All your tools in one place hassle-free

Sign in with One Healthcare ID

Don't have a One Healthcare ID? **Register**

Questions about One Healthcare ID and Mobile App? **See our FAQ**

- Enter your One Healthcare **ID** and **password**

- Click on **Sign-In**

Sign In With Your One Healthcare ID

One Healthcare ID or email address

Password

Sign In

For log in or other assistance with Jarvis, contact the Producer Help Desk (PHD):
888-381-8581 *Monday – Friday 7 a.m. to 9 p.m. CT*

Accessing Learning Lab

Once you are logged into *Jarvis*, hover your mouse over the **Knowledge Center** tab and click on **Learning Lab**.

Note: if you click on the **Training and Certifications** option, you will also find a link to Learning Lab.

.
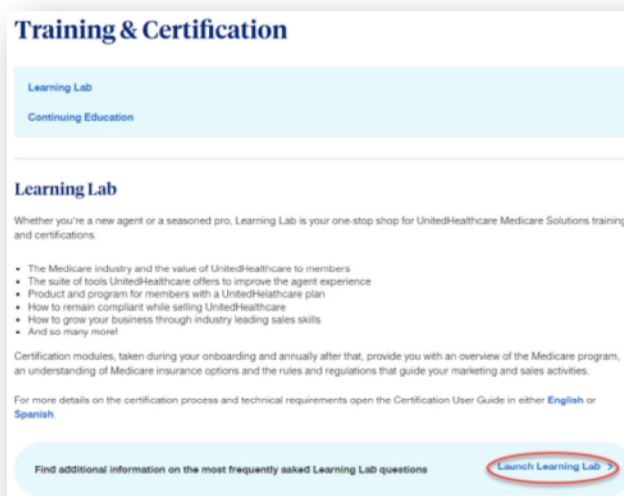
For detailed information on using Learning Lab, please review the Learning Lab User Guide found on Learning Lab. It is located on the top of the Learning Lab home page.
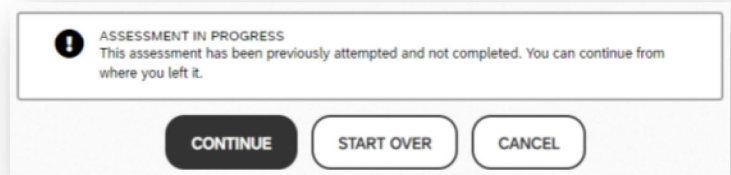
Attempts, Results and Progress

ATTEMPTS

Attempts are counted when you complete an assessment. However, if you exit an assessment early and return to take it again, you will have two options which affect attempt counts: **Continue** or **Start Over**.
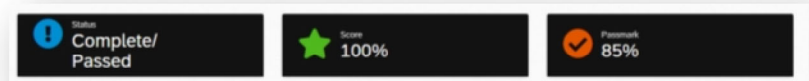
- Selecting Continue resumes the prior attempt.
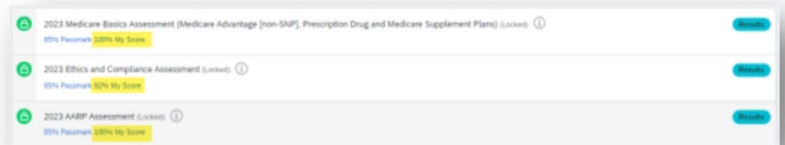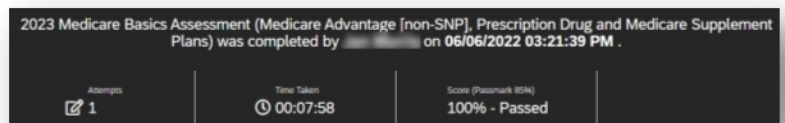- Selecting Start Over begins a new attempt and counts the previous early exit attempt.

ASSESSMENT IN PROGRESS
This assessment has been previously attempted and not completed. You can continue from where you left it.

CONTINUE   START OVER   CANCEL

RESULTS

When you complete an assessment (either pass or fail), you will see the results.

| Status Complete/Passed | Score 100% | Passmark 85% |

Back on the course page, you will also see a status for each module. On the left, a green filled circle means you have completed that assessment. You will also see your score in percentage.

2023 Medicare Basics Assessment (Medicare Advantage [non-SNP], Prescription Drug and Medicare Supplement Plans) (Locked)
85% Passmark 100% My Score

2023 Ethics and Compliance Assessment (Locked)
85% Passmark 92% My Score

2023 AARP Assessment (Locked)
85% Passmark 100% My Score

Click on the **Results** button to see the number of attempts used.

2023 Medicare Basics Assessment (Medicare Advantage [non-SNP], Prescription Drug and Medicare Supplement Plans) was completed by _____ on 06/06/2022 03:21:39 PM .

| Attempts | Time Taken | Score (Passmark 85%) |
| 1 | 00:07:58 | 100% - Passed |

Achievements and Printing Certificates

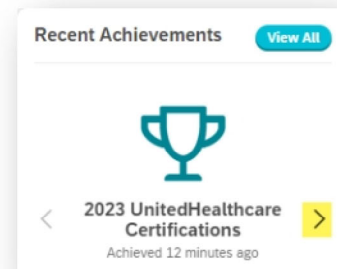Note: certificates are available for Base Level, SNPs, and Events Basics assessments.

To view a list of your completed courses and modules from the **Home Page:**

- Click on the **Achievements** tab.

- A list of all your achievements will appear with the achievement date.

- Click **Download certificate** to obtain a printable copy.

- A PDF of the certificate will appear. Open the PDF and print the certificate.
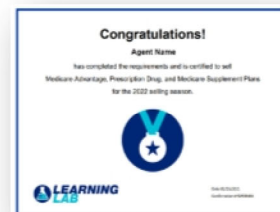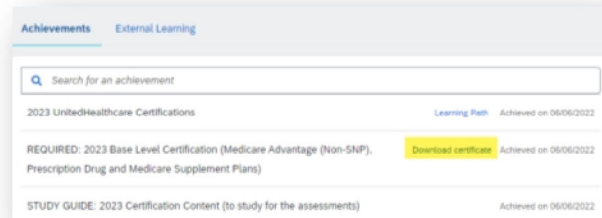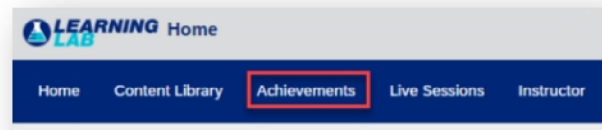
For a quick view of your most recent achievements:

- From the Home page, scroll down to find your recent achievements tile. You can click the forward and back arrows to see the most recent achievements.

- Click on **View All** in the **Recent Achievement** tile to see all achievements.

6-24-2022   Confidential property of UnitedHealth Group. For Agent use only.   Page 12

Do not distribute, reproduce, edit or delete any portion without the express permission of UnitedHealth Group.

- To view a list of your completed certifications on **Jarvis.** Click on your **name.**
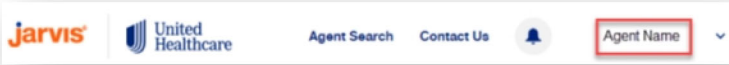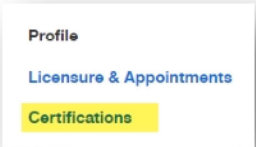

- Click on Manage Profile.

- Click on **Certifications on the left.**

- A list of your current certifications will appear.

6-24-2022   Confidential property of UnitedHealth Group. For Agent use only.   Page 13

Do not distribute, reproduce, edit or delete any portion without the express permission of UnitedHealth Group.

Technical Requirements

Make sure you have a strong internet connection before you begin taking an assessment. A disconnection may result in a used attempt.

Desktop

- Broadband Internet Connection
- Web Browser:
    - Google Chrome *(recommended for optimal usage)*
    - Microsoft Edge
    - Firefox 2+
    - Safari

Note: Internet Explorer is not recommended for use with Learning Lab due to compatibility issues.

Mobile Devices

- Apple iOS devices using Safari mobile web browser
- Android devices using Google Chrome mobile web browser

While not a requirement, Learning Lab is best viewed using a minimum screen resolution of 1024 x 768

If you have trouble launching any modules, contact the Producer Help Desk (PHD):

888-381-8581

(Monday – Friday, 7 a.m. to 9 p.m. CT)

Note: Screen shots are for illustrative purposes only and are subject to change without notice.

6-24-2022
Confidential property of UnitedHealth Group. For Agent use only.
Do not distribute, reproduce, edit or delete any portion without the express permission of UnitedHealth Group.
Page 14