UnitedHealthcare[®]

2024 Certification User Guide

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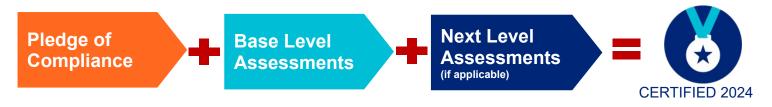
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2024 Annual Certification Requirements

UnitedHealthcare Certification Requirements

To solicit, present or sell any products in the UnitedHealthcare[®] Medicare plans (may 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.
- Complete <u>all</u> BASE LEVEL ASSESSMENTS by passing with a score of 85% or higher within 6 attempts (70% for AARP).
 - 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 plans 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 (80% for Events Basics) or you will not be allowed to sell the applicable product for the plan year.
 - Available Next Level assessments are:
 - Dual and Chronic Condition Special Needs 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.

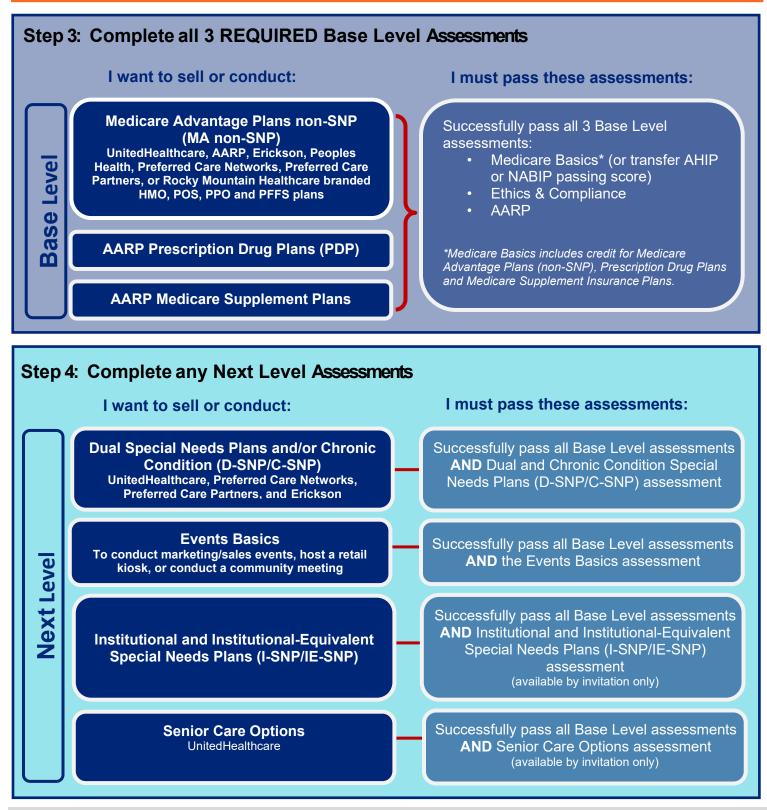
AHIP or NABIP Certification for our EDC Partners

America's Health Insurance Plan (AHIP) or National Association of Benefits and Insurance Professionals (NABIP) 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 instructions provided in this guide.

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



6-21-2023

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Certification Instructions

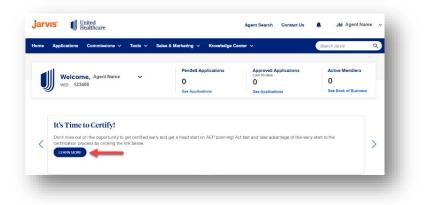


From Jarvis, click on the certification path link near the top of the screen (in the news article scroll). This will take you directly to Learning Lab and the courses you need to complete for certification. Spanish is also available once you enter the Learning Lab path.

Note for 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> or <u>NABIP</u> and UnitedHealthcare courses.

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 2024 Certifications in the Content Library tab.

Then select the learning path you need to complete (only complete one path).





2

When the path opens in Learning Lab, you will see a description and some instructions.

You will also find the links to Spanish, AHIP and NABIP. Select any of those options if you prefer and follow the instructions below.

If you select a link but decide that you would prefer to take the English version or non-AHIP/non-NABIP version of UnitedHealthcare Certifications, click the back button or exit and follow the instructions below.

You will first see 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.

UnitedHealthcare Certification Date on certification	TAKE THIS UNITEDHEALTHCARE PATH OR THE AHIP PATH OR THE NABIP PATH. NO NEED TO TAKE ALL. This path includes the following courses: . What's New and Instructions (tools to help you know what is new and required for certification) . Study Guide (all the content you need to study to pass the required assessments) . Base Level Courses: to sell MA (non-SNP), PDP and Medicare Supplement . D-SNP/C-SNP Course: to sell MA (non-SNP), PDP and Medicare Supplement . D-SNP/C-SNP Course: to sell D-SNP or C-SNP (must also complete all Base Level Courses) . Events Basics: to conduct any marketing/sales events (must also complete all Base Level Course) Note: If you have been invited to sell I-SNP/IE-SNP or Senior Care Options, you will see these courses on your Home Page.
	Haga clic aquí para ver la versión en español> <mark>Spanish</mark>
	AHIP Certification Path> AHIP Path
	NABIP Certification Path> NABIP Path

~	RECOMMENDED: 2024 Certification Instructions () Optional
	2024 Certification Instructions (j)
	Certification Decision Tree (j)
	2024 Certification User Guide (j)
	How To Certify (video 3:40) (
	How To Certify (course) () One My Score
~	STUDY GUIDE: 2024 Certification Content (to study for the assessments)
	2024 Certification Content Study Guide 3

NEW! The Study Guide is also available from the Home Page in the 2024 Certification Study Guide tab.

	vo 2024 Fast Trad	ck Certification		
Home	Content Library	Achievements	Live Sessions	2024 Certification Study Guide



- Pledge of Compliance 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 successfully passing all 3 base level assessments with 85% or higher passing score (70% for AARP) 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.

Complete any Next Level assessments if you wish to certify to sell more than the base level.

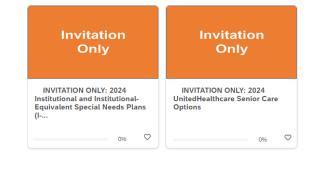
For example, if you want to sell D-SNP and/or C-SNP, complete that assessment; if you want to conduct any marketing events, complete the Events Basics assessment.

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

2024 Pledge of Compliance (i)	
2024 Pledge of Compliance Agreement	

~	REQUIRED: 2024 Base Level Certification (Medicare Advantage [Non-SNP], Prescription Drug and Medicare Supplement Plans) 🕕	
0	2024 Medicare Basics Assessment (Medicare Advantage (non-SNP), Prescription Drug and Medicare Supplement Plans) (Lookel) 🛈 1919 Resents (1919 My Score	Results
0	2024 Ethics and Compliance Assessment (Lucker) ① 85% Pasmark 105% My Score	Results
0	2024 AARP Assessment (Jockon) ① 70% Facinization 100% MJ Score	Results

~	REQUIRED TO SELL D-SNP/C-SNP: 2024 Dual and Chronic Special Needs Plans (D-SNP/C-SNP) 🚯
	2024 Dual and Chronic Condition Special Needs Plans (D-SNP/C-SNP) Assessment (j) 85% Passmark
~	REQUIRED TO CONDUCT EVENTS: 2024 Events Basics 🕕
	2024 Events Basics Assessment (j) 85% Passmark



AHIP Certification Instructions

We are pleased to once again accept the AHIP Medicare + Fraud, Waste and Abuse Training from American's Health Insurance Plans. Agents choosing to pursue AHIP via UnitedHealthcare are eligible to receive a \$50 discount 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 (UnitedHealthcare only acknowledges the initial two purchases).

All agents are required to sign the **Pledge of Compliance**. 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), Prescription Drug Plans (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 button.

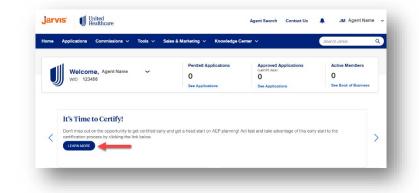
Welcome to Jarvis All your tools in one place hassle-free Sign in with One Healthcare ID Don't have a One Healthcare ID? Register Questions about One Healthcare ID and Mobile App? See our FAQ

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 Sign In Forgot One Healthcare ID Forgot Password Hr you'd like assistance, contact support at 1(888)/31-8581 or phd@uhc.com.

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 2024 Certifications.

Then select the learning path you need to complete (only complete one path).

Knowledge Center Learning Lab Training & Certif Training and Gui Resources	ications
2024 UnitedHealthcare Certificat	2024 UnitedHealthcare Certificat
REQUIRED: 2024 Pledge of Comp	oliance (i)
2024 Pledge of Compliance Incomplete (i
2024 Pledge of Compliance Agreement	Incomplete (i)

Click on the 2024 AHIP module.

Complete the Pledge of

Compliance.

REQUIRED: 2024 Base Level Certification for AHIP (Medicare Advantage (Non-SNP), Prescription Drug and Medicare Supplement Plans)
 2024 AHIP in Progress
 2024 Ethics and Compliance Assessment Incomplete
 2024 Ethics and Compliance Assessment Incomplete
 2024 ARIP Assessment Non-Myster
 2024 Ethics and Compliance Assessment Incomplete
 2024 ARIP Second Seco

Click on the link Click here to launch AHIP.



A new tab will open 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.

For assistance with the purchasing process, please refer to the User Guide located on the AHIP site.

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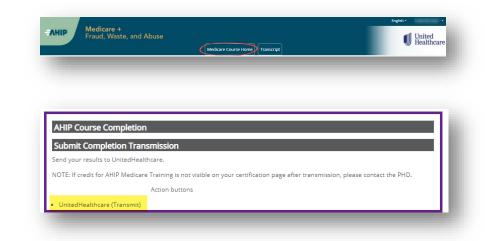
D 2023 AHIP

× 🚽 Login



AHIP	Medicare + Fraud, Waste, and Abuse
Quick Links	_
AHIP Insurance Educatio	n
AHIP Conferences	

To send your results to UnitedHealthcare go to the Medicare Course Home tab, scroll to the bottom of the screen to click the **UnitedHealthcare (Transmit)** link.



Log out of your AHIP account 🗙 🕂 Dashboard C 2023 AHIP and close the AHIP tab. CŴ https:/ A* Q 50 2 C 🖬 3 🖆 G Medicare + Fraud, Waste, and Abuse On the Learning Lab tab, click × + CA the **EXIT** button to return to nin 🔍 the main page where the 2024 2024 AHI AHIP will appear completed upon successful transmission. REQUIRED: 2024 Base Level Certification for AHIP (Medicare Advantage (Non-SNP), Prescription Drug and Medicare Supplement Plans) (1) Proceed with completing the 2024 AHIP remaining REQUIRED Base 2024 Ethics and Compliance Assessment (i) Level assessments as well as 2024 AARP Assessment (i) nark 096 My Sc any Next Level assessments 🔒 REQUIRED TO SELL D-SNP/C-SNP: 2024 Dual and Chronic Special Needs Plans (D-SNP/C-SNP) 🕕 if you wish to certify to sell more than the Base Level. ▲ REQUIRED TO CONDUCT EVENTS: 2024 Events Basics ③

REMINDER: For agents choosing to complete the 2024 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.

NABIP Certification Instructions

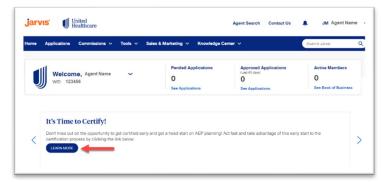
We are pleased to offer another third-party certification program as a way to earn credit for the UnitedHealthcare Basics Assessment with a passing score from the National Association of Benefits and Insurance Professionals (NABIP).

Per policy, agents choosing to certify via NABIP must obtain a minimum score of 85% within six attempts. Each purchase consists of six attempts.

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

All your tools in one place hassle-free Sign in with One Healthcare ID Don't have a One Healthcare ID? Register	-
Don't have a One Healthcare ID? Register	
Questions about One Healthcare ID and Mobile App? S	ee our FAQ
Sign In With Your One Healthcare	ID
Password Create One Manage yor Healthcare	Healthcare ID ur One
Forgot One Healthcare ID Forgot Password	}uhc.com.
	Password Password Sign In Sign In

From Jarvis, click on the NABIP 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.



Knowledge Center \land If you don't see the article, go to the Knowledge Center tab on the top bar. Then click on Learning Lab. That will Learning Lab open Learning Lab and you can search **Training & Certifications** for 2024 Certifications. **Training and Guides** Resources Then select the learning path you UnitedHealthcare UnitedHealthcare Certifications Certifications need to complete (only complete one Take one on path only for Multi-Carrier Call Center path). 2024 2024 UnitedHealthcare UnitedHealthcare Certificat... Certificat... Complete the Pledge of Compliance. **REQUIRED: 2024 Pledge of Compliance** (i) 2024 Pledge of Compliance Incomplete (i) 2024 Pledge of Compliance Agreement Incomplete (i)

Click on the 2024 NABIP module.

Click on the link Click here to launch NABIP.





A new tab will open on the NABIP landing page. In the upper right corner, it will say "Hello, Guest." Place your cursor on the text for the Sign In drop down menu to appear.



On the **Sign In** page, you can enter your login credentials or create a new account.

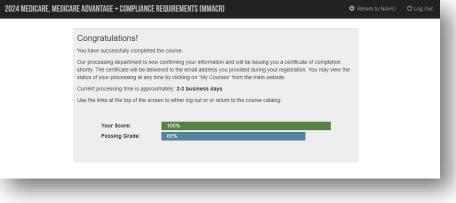
If you require assistance with your login credentials, please email professionaldevelopment@nabip.org or call the NABIP Student Services Helpdesk at 844-257-0990.

Sign In to Access Online Learning Institute	*PLEASE NOTE: NABIP strongly recommends clearing internet browser cookies for the best experience using the upgraded member portal
Username Password Keep me signed in Sign in Frenz Password	website. NABIP recently upgraded the member portal to offer members ner features and self service capabilities. Users will only need to clear internet browser cookies one time as a result of the website upgrade. Not sure how to clear browser cookies? <u>Click here for step by step</u> instructions.
No login? Click below to create an account online. CREATE YOUR ACCOUNT	

For assistance with the purchasing process, please refer to the **User Guide** located on the NABIP site.

Upon successfully completing the final exam the results will automatically be send to UnitedHealthcare. Log out of your NABIP account and close the NABIP tab.

	UHC 2024 Medicare, Medicare Advantage and Compliance Requirements
	BIP
Description Mate	f in 💟 S
reducing the time of market. The course Medicare, Medicare	course is to provide a quality certification that meets CMS requirements while commitment of veteran agents who are already well versed in the MA and Part D is affordable and provide an optimum number of continuing education credits. The Medicare certification course includes basic Advantage, and Fraud, Waste, and Abuse training. NABIP's Benefit Specialist institute provides a comprehensive online program the background to make informed decisions on Medicare, including plan options, marketing, and enrollment requirements.
This curriculum wi	Il cover:
Most Common	Compliance Issues Facing Plan Sponsors and Agents
 Changes in CM 	1S Guidelines
Trends in the M	Varketplace
Medicare Supp	plement
	t includes online presentations in three chapters, a final exam, and continuing education credits at no additional charge (status by ease check your state for CE credit approval before registration.
daily. It is importan	n sponsors accepting NABIP's Medicare, Medicare Advantage, and Compliance Requirements certification training increases It to contact our office before enroliment and ensure your plan sponsors participate in PY 2023. Student services staff respond ness hours 9 a.mS30 p.m. ET at professionaldevelopment[[mabip.org]
	is the NABIP Medicare Advantage Certification Training User Guide. The user guide outlines how to create an account, purchase, ning, and take the final exam in the Online Learning Institute.
Frequently Asked Click here to read of	Questions our FAQs on the NABIP Medicare Advantage Certification Training.



On the Learning Lab tab, click the EXIT button to return to the main page where the 2024 NABIP will appear completed upon successful transmission.	Image: Source Adminestration of the source
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 .	 2024 Base Level Certification for NABIP (Medicare Advantage (Non-SNP), Prescription Drug and Medicare Supplement Plans) () 2024 NABIP 2024 Ethics and Compliance Assessment () 89% Passmak 0% My Score 2024 AARP Assessment () 2024 AARP Assessment () 2024 AARP Assessment () REQUIRED TO SELL D-SNP/C-SNP: 2024 Dual and Chronic Special Needs Plans (D-SNP/C-SNP) () REQUIRED TO CONDUCT EVENTS: 2024 Events Basics ()

REMINDER: For agents choosing to complete the 2024 NABIP, either directly from the NABIP 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.

Registered Users

- Go to www.uhcjarvis.com
- Click on Sign in with One Healthcare ID

Sign in with One	Healthcare ID	-		
Don't have a One Healt Questions about One H		obile App? Se	e our FAQ	
Sign In With	Your One	Healthc	are ID)
-		Healthc	are ID)
-		Healthc	are ID)
Sign In With Dine Healthcare ID or Password		Healthc	are ID)
Dne Healthcare ID or		Healthc	are ID)
e Healthcare ID or		Healthc		>

 Enter your One Healthcare ID and password

Click on 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.

Knowledge Center \land	
Learning Lab	
Training & Certifications	
Training and Guides	
Resources	

Whether you're a new agent or a seasoned pro, Learning Lab is your one-stop shop for UnitedHealthcare Medicare Solutions training

Training & Certification

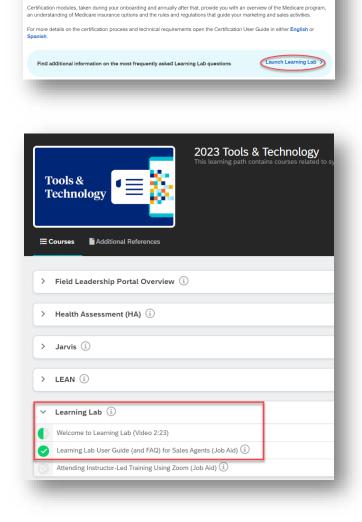
The Medicare industry and the value of UnitedHealthcare to members
 The suite of toole UnitedHealthcare offers to improve the agent experience
 Product and program for members with a UnitedHealthcare plan
 How to remain compliant while selling UnitedHealthcare
 How to grow your business through industry leading sales skills
 And so many model

Learning Lab

Continuing Education

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

For detailed information on using Learning Lab, please review the Learning Lab User Guide found on Learning Lab. It is located in the Tools and Technology path or search for it in the Content Library tab.



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.



RESULTS

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

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.

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

	Complete/ Passed	Passmark 85%	_
	REQUIRED: 2024 Base Level Certification (Medicare Advantage [Non-SNP], Prescription Drug and Med	dicare Supplement Plans) ①	ī
)			
)	2024 Medicare Basics Assessment (Medicare Advantage (non-SNP), Prescription Drug and Medicare Supplement Plans) (Locked 5% Passwork 2004 My Socie		

Attempts	Time Taken	Score (Passmark 85%)	
2	() 00:00:13:45	100% - Passed	

Achievements and Printing Certificates

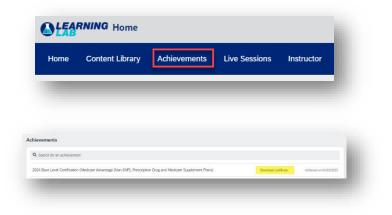
Note: certificates are available for Base Level, SNPs, and Events Basics assessments.

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

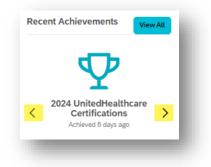
- Click on the Achievements tab.
- A list of all your achievements will appear with the achievement date.
- Click **Download certificate** to obtain a printable copy.
- A PDF of the certificate will appear. Open the PDF and print the certificate.

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.
- To view a list of your completed certifications on Jarvis, click on your name.







jarvıs	United Healthcare	Agent Search	Contact Us		Agent Name	~
	Manag	e Profile	Sign	Out	i.	

•	Click on	Certifications	on	the	left.
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Licensure & Appointments
Certifications

Certificate Name

Completion Date

<u>Year</u> ~

• A list of your current certifications will appear.

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+
 - o 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.