



# 2025 Certification User Guide

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# 2025 Annual Certification Requirements

## UnitedHealthcare Certification Requirements

To solicit, present or sell any products in the UnitedHealthcare® Medicare products (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** (as required by the state) 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 the content needed to pass the assessments.

- Review the **WHAT'S NEW** document.
- Complete the **PLEDGE OF COMPLIANCE**.
- Complete all **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.
  - Base Level assessments must be taken in order:
    - Medicare Basics
    - Ethics and Compliance
    - AARP
- Complete the **NEXT LEVEL MODULES and/or ASSESSMENTS**:
  - Next Level assessments (require passing at **85% or higher within 6 attempts**):
    - Dual Eligible and Chronic Condition Special Needs Plans (D-SNP/C-SNP)
    - Institutional and Institutional-Equivalent Special Needs Plans (I-SNP/IE-SNP)\*
    - Senior Care Options\*
  - Next Level Module (no assessment):
    - Events Basics (required for conducting any marketing/sales events)

*\*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* WHAT'S NEW and PLEDGE OF COMPLIANCE documents**

**Step 3: Complete all 3 REQUIRED Base Level Assessments**

**Step 4: Complete any Next Level Modules and/or Assessments**



All agents must first agree to the Pledge of Compliance before taking any assessments.

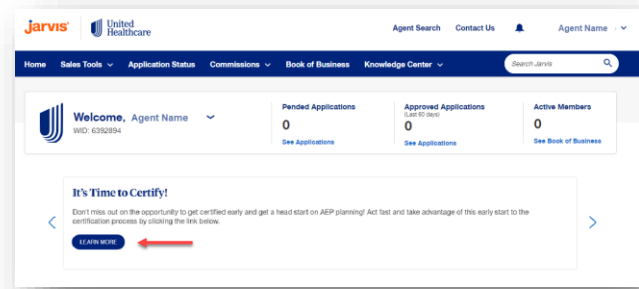
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**United  
Healthcare**

# Certification Instructions

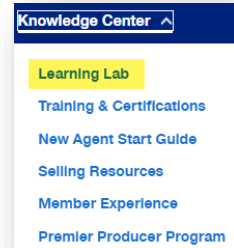
1

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.



*Note for Field Sales agents: Before you begin your certifications, decide if you are taking your certifications entirely via UnitedHealthcare modules **OR** if you will be using a combination of AHIP or NABIP 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 2025 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.

Below the description, you will first see the **Study Guide** which has the content you need to know to pass the assessments. Then you'll see some **RECOMMENDED** courses. These are optional but highly recommended.

**NOTE!** The Study Guide is also available from the Home Page in the 2025 Certification Study Guide tab for easy access all year long as a reference.

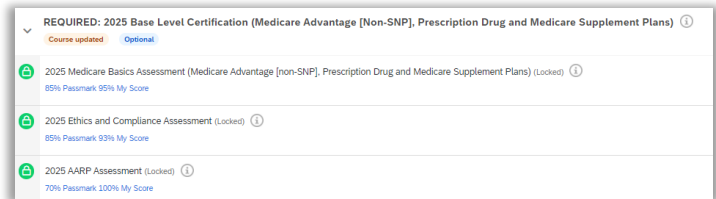
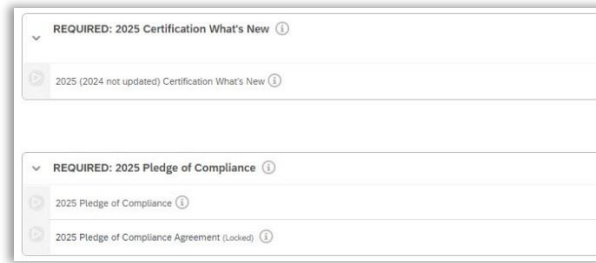
### 3 Complete all the REQUIRED courses:

- What's New document
- Pledge of Compliance and
- 3 Base Level Assessments (Medicare Basics, Ethics & Compliance, and AARP).

Six attempts\* are allowed on each assessment.

Reviewing the What's New document, 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) Plans, Prescription Drug Plans, Medicare Supplement Plans, and Standalone Dental, Vision and Hearing Plans.

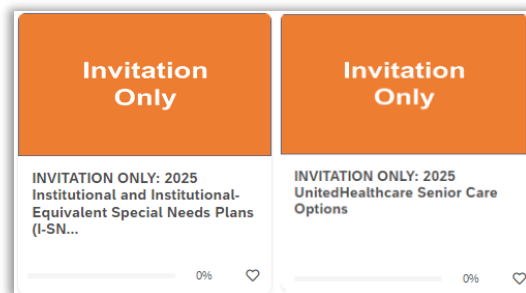
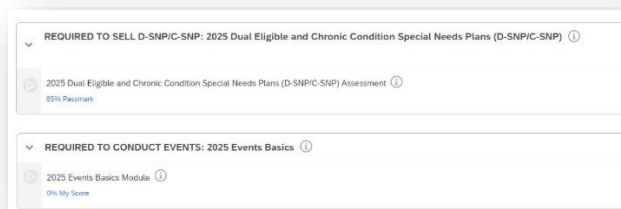
*\*An attempt is counted when you complete the assessment or if you restart a previous attempt.*



### 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 module.

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

**Important Note:** AHIP is currently updating their system and has not yet provided instructions and screen shots. We expect to have this information by June 24, 2024, and will provide an updated User Guide at that time.

## NABIP Certification Instructions

**Important Note:** NABIP is currently updating their system and has not yet provided instructions and screen shots. We expect to have this information by June 20, 2024, and will provide an updated User Guide at that time.

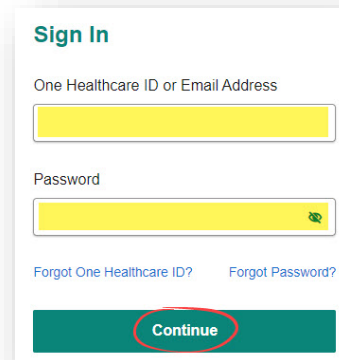
# Logging into Jarvis

## Registered Users

- Go to [www.uhcjarvis.com](http://www.uhcjarvis.com)
- Click on [Sign in with One Healthcare ID](#)



- Enter your One Healthcare ID and password
- Click on [Continue](#)



*For log in or other assistance with Jarvis, contact the Producer Help Desk (PHD):*



### Need Help?

Contact the Producer Help Desk (PHD)

Monday – Friday 7am – 9pm CT

[phd@uhc.com](mailto:phd@uhc.com) [888-381-8581](tel:888-381-8581)

866-235-5990 (Spanish)

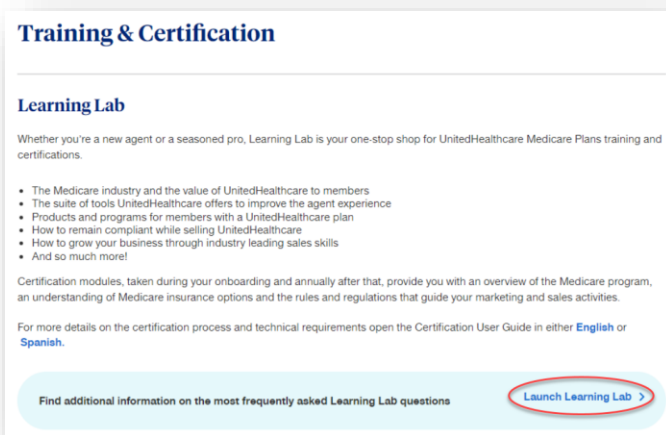


# Accessing Learning Lab

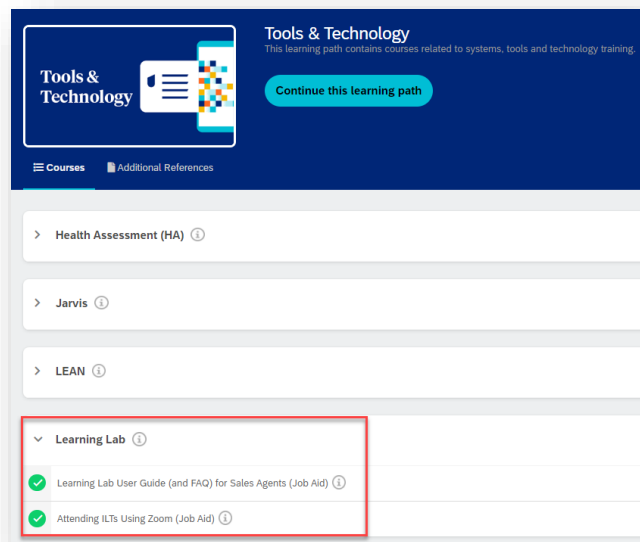
Once you are logged into *Jarvis*, hover your mouse over the **Knowledge Center** tab and click on **Learning Lab**.



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 in the Tools and Technology path or search for it in the Content Library tab.

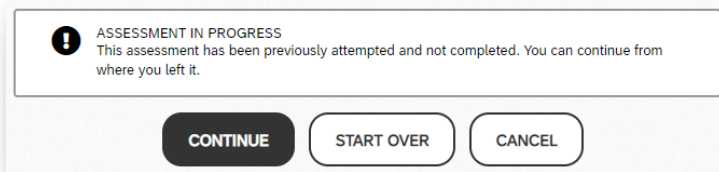


# Attempts, Results and Progress

## ATTEMPTS

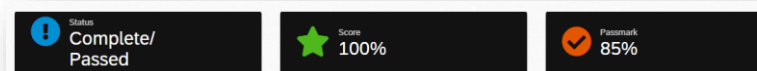
Attempts are counted when you complete an assessment. However, if you exit an assessment early and return to take it again, you will have **two options** which affect attempt counts: **Continue** or **Start Over**.

- Selecting Continue resumes the prior attempt.
- Selecting Start Over begins a new attempt and counts the previous early exit attempt.

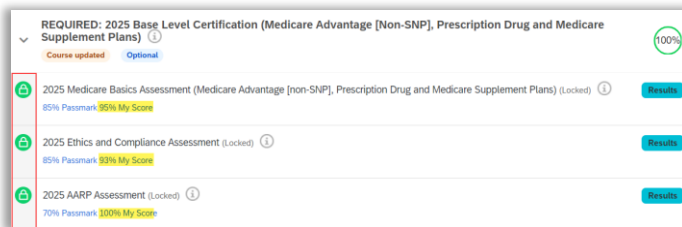


## RESULTS

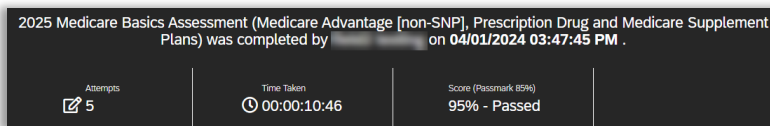
When you complete an assessment (either pass or fail), you will see the results.



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.

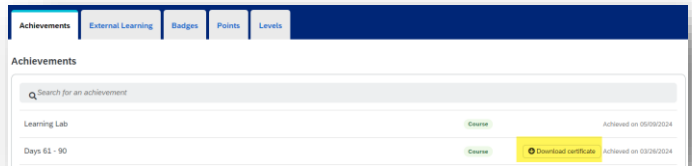
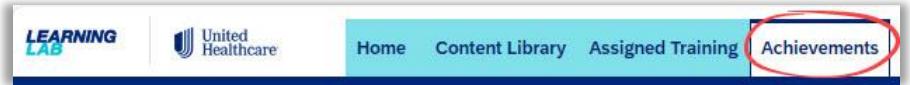


# Achievements and Printing Certificates

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

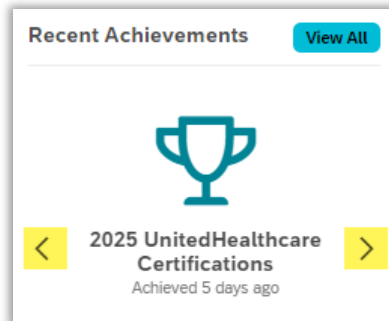
To view a list of your completed courses and modules from the [Home Page](#):

- 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.

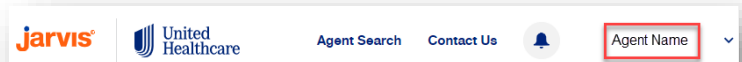


For a quick view of your most recent achievements:

- 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.



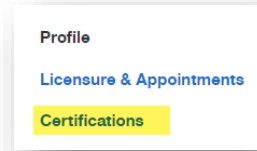
To view a list of your completed certifications on [Jarvis](#), click on your [name](#).



- Click on Manage Profile.



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



- A list of your current certifications will appear.

Current Certifications		
Year	Certificate Name	Completion Date

# Learning Lab System Requirements

For optimized viewing, broadband internet connection is recommended.

## Desktop

- Web browser:
  - Microsoft Edge
  - Google Chrome
  - Mozilla Firefox
  - Apple Safari
- JavaScript and cookies enabled

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

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

## Mobile Devices

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



### Need Help?

Contact the Producer Help Desk (PHD)

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866-235-5990 (Spanish)

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