



AEP Agent Playbook

2025 Edition

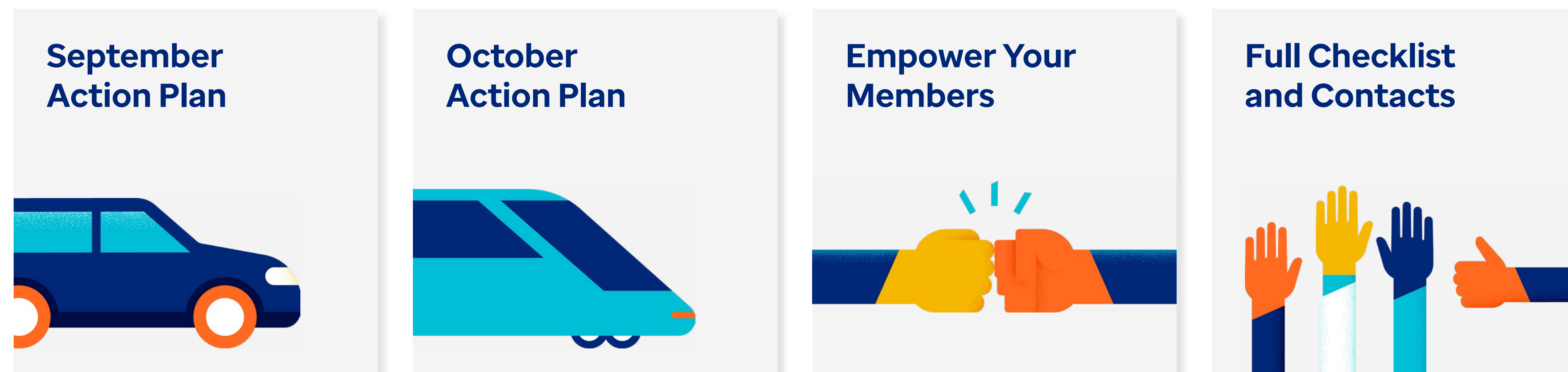




Introduction

As the industry enters a new chapter, we're excited to partner with you on The Way Forward to grow your business and advance the UnitedHealth Group mission to help people live healthier lives and help make the health system work better for everyone.

This playbook is designed to prepare you for the Annual Enrollment Period (AEP) by sharing key information and resources. View the topics below to learn more.



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Your Members**

**Full Checklist
and Contacts**

September

Engage with your existing Book of Business and get ready to sell



It's time to dig in and prepare for the upcoming AEP. UnitedHealthcare is here to help you focus on your current Book of Business and create a marketing plan.

Let's get started!

DEVELOP YOUR RETENTION STRATEGY

PREPARE FOR AEP

SALES MATERIALS PORTAL

UNDERSTAND 2025 PLANS

GET INTO GEAR TO HOST EVENTS

MEDICARE PRODUCT PORTAL



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Develop your retention strategy

Retention is an important strategy for growing your business. Checking in with your clients can help to make sure they are satisfied with their coverage, and retaining clients helps with income stability with renewal commissions.

Existing members will receive educational materials from UnitedHealthcare in September, including their Annual Notice of Change.

CLICK
HERE!

Start connecting with clients to see if their health needs have changed. Utilize the 2025 Medicare Plan Checkup to gather what is most important for your member.

Go the [UHC Agent Toolkit](#) ▶ Search MA/DSNP Plan Checkup

Schedule in-person and virtual Annual Notice of Change (ANOC) meetings for existing clients. Make sure to file the event as a Sales/Marketing Event so you can take a plan change or capture a new enrollment, as necessary.

Remember, you cannot discuss 2025 plans or benefit information with clients until October 1, 2024. The appointments can be scheduled prior to Oct. 1 and SOAs can be obtained at any time prior to the scheduled appointment.

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Create a calendar to stay on task with events you are hosting.

Remember, you must have completed Fast Track or the Events Basics course before you can file a marketing/sales event.

Send the Member ANOC Relationship Letter found in the UHC Agent Toolkit.

Go to the UHC Agent Toolkit ▶ Search ANOC Relationship

Register for the 2025 AEP Retention Strategy National Webinar to learn how to retain your book of business this AEP!

Go to the National Webinar Schedule on Jarvis to find a course and register



Prepare for AEP

Make sure you are certified and ready to sell in your market. Then it's time to make a splash! Start thinking about how you can engage in your community.

Complete your UnitedHealthcare Certifications.

Go to Jarvis ▶ [Ready to Sell](#) for more information

Confirm you are appointed in the states you are licensed in.

Develop your marketing plan. Include your targeted geographical area, targeted member demographic, approved marketing materials and plan for generating leads.

Pre-order your enrollment guides on the Sales Materials Portal (see [page 8](#)).

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Set goals to hold yourself accountable and to stay on track for a successful AEP.

Get to know your Jarvis tools and how to use them – Find a Doctor, Find a Pharmacy, Drug Cost Estimator, OTC Store Locator and more – so you can help clients.

Get familiar with JarvisEnroll, the UnitedHealthcare electronic enrollment tool, by registering for a National Webinar or taking advantage of the on-demand training materials. Pro tip: you can start a Medicare Advantage application directly from your Book of Business on Jarvis. Reminder, LEAN will be decommissioned on Sept. 16, 2024.

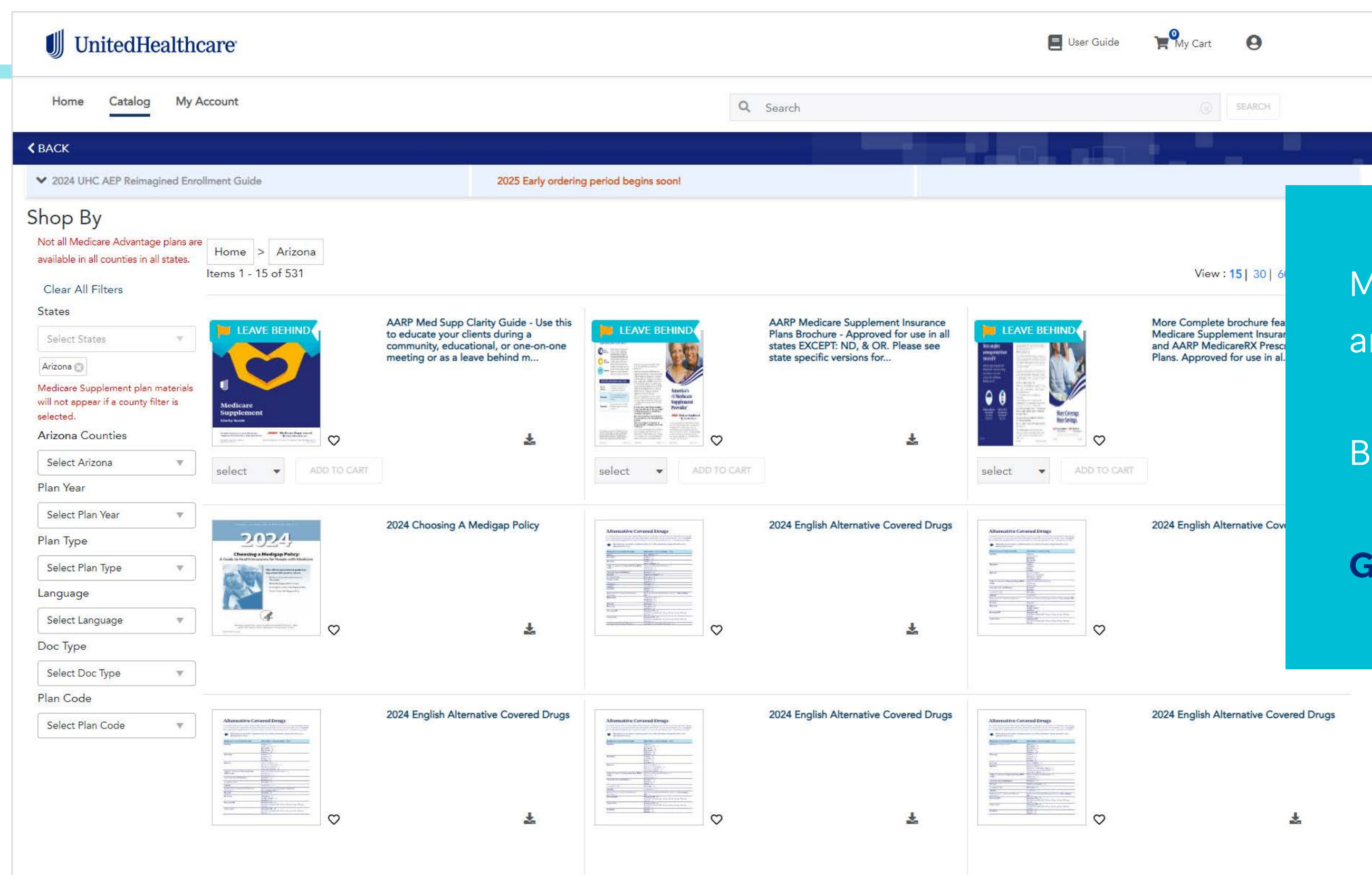
**Go to Jarvis ▶ [National Webinar Schedule](#) or [On-Demand Training](#) ▶
JarvisEnroll (under Tools & Technology).**



UNITEDHEALTHCARE TOOLS SPOTLIGHT

Sales Materials Portal

The Sales Materials Portal makes it easy to order or download sales materials, including enrollment guides and kits, benefit highlight brochures, drug formularies, evidence of coverage documents and more.



Materials are available for MA, PDP and Medicare Supplement products. Be sure to get your orders in!
Go to Jarvis ▶ [Sales Materials](#)

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Understand 2025 plans

Attend a local rollout meeting to learn about the 2025 UnitedHealthcare portfolio.

Review and get familiar with each plan's upcoming changes, including some that may have new plan names.

Go to [Product Guides](#) ▶ [2025 Plan Names to learn more](#)

Check out the Medicare Product Portal to easily view and compare UnitedHealthcare Medicare Advantage Plans available in your market.

Go to [Jarvis](#) ▶ [Quick Access](#) ▶ [Medicare Product Portal](#)

Check out the 2025 Quick Reference Guides for Dental, OTC, Rewards and more.

Go to [Jarvis](#) ▶ [Product Guides](#)

Learn more about your market by joining a local market training.

Go to [Jarvis](#) ▶ [National Webinar Schedule](#) and click “Local Trainings” in the upper right corner

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Get into gear to host events

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Prepare and practice your sales presentations.

Call meeting locations to verify date and time for events that you are hosting.

Make sure you have a full supply of materials on hand – business cards, shopping sheets, brochures, flyers and other marketing materials.

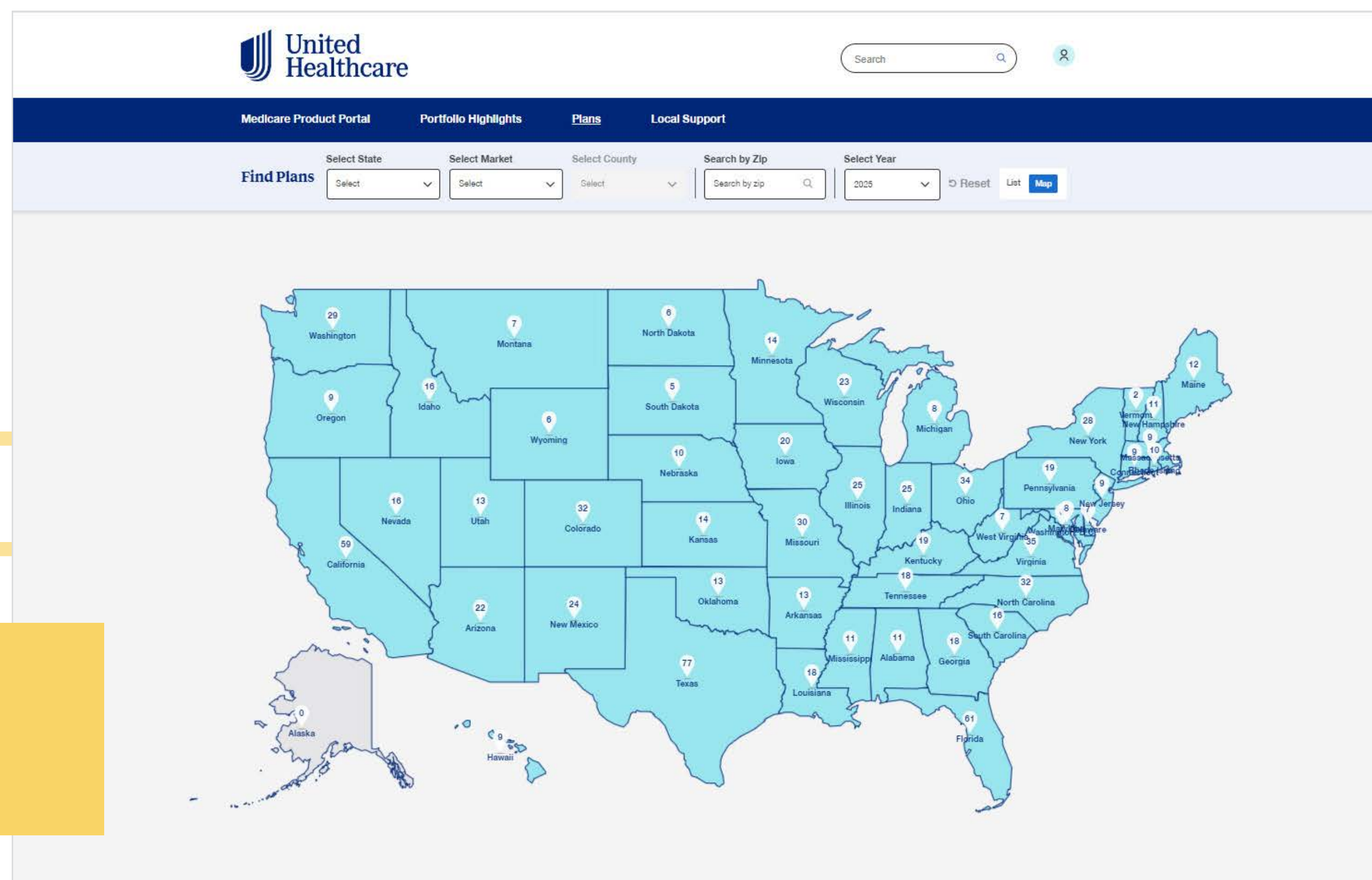
Strategize with your local UnitedHealthcare Sales Leader on how to handle when clients stall and object.



UNITEDHEALTHCARE TOOLS SPOTLIGHT

Medicare Product Portal

The Medicare Product Portal is your resource for all UnitedHealthcare Medicare Advantage plan information. With just a click, everything you need is at your fingertips. You can easily search plans by market to view and compare benefits and plan details or save them to your profile for quick reference later. Within the Medicare Product Portal, you can also search for your local UnitedHealthcare leadership who are available for support.



Go to [Jarvis](#) ▶ Quick Access ▶ Medicare Product Portal

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Inform your existing Book of Business and set appointments with new clients

You're almost there! It's your last chance to solidify your strategy before AEP starts on October 15.

KEEP CONNECTING WITH YOUR MEMBERS

START OCTOBER 1

UHC AGENT TOOLKIT



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Keep connecting with your members

Conduct your events:

- Go through the new Member Retention presentation (in-person / virtual nuances).
- Close with offering appointments to discuss the best course of action for 2025.

It's still a good time to send the Member ANOC Relationship Letter found in the UHC Agent Toolkit to encourage members to be thinking about the upcoming enrollment.

Get in front of your Book of Business to discuss plan options (remember not to start the enrollment until October 15).

Itemize your meetings – ANOC, Service Area Reduction (SAR) Impacts, New Market Plans available (you built your pipeline, now is the time to follow up with people you connected with all year).

Goal: Fill your AEP calendar

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Start October 1

Reach out to your local support to find out how they are going to be supporting you during AEP (chats, channels, meetings, emails).

Dig into how the benefits will work with the plans you are selling. What do clients need to know?

Familiarize yourself with the Enrollment Guides and drug coverage (formularies).

Review network changes. Know the providers in the UnitedHealthcare network.

Gather UnitedHealthcare videos to show clients.

Reach out to your local UnitedHealthcare support to see what resources they have to support you. For example, Q&A sessions, discussion meetings and ongoing conversations.

Check your market for any additional AEP Rollout Sessions in case you need a refresher.

Connect with Providers, Pharmacies, Health Organizations, and Business Partners to educate them on industry and plan updates for 2025.

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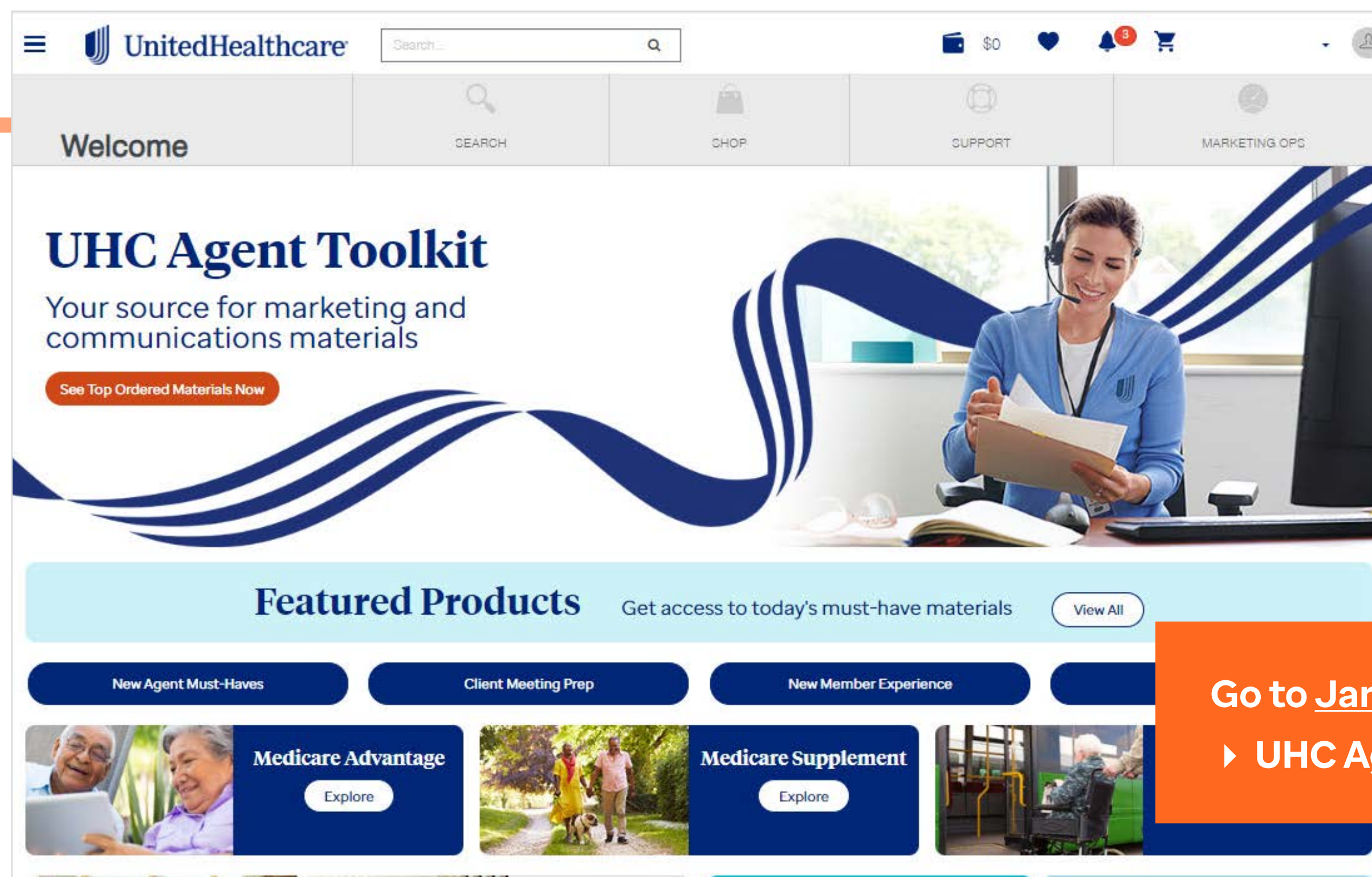
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UNITEDHEALTHCARE TOOLS SPOTLIGHT

UHC Agent Toolkit

The UHC Agent Toolkit provides lead generation marketing, retention and plan materials that can be customized with your contact info, plan details and more. These materials help promote and grow your business and retain your members while remaining compliant with the Centers for Medicare & Medicaid Services requirements and other applicable federal and state requirements.



Go to [Jarvis](#) ▶ Quick Access
▶ UHC Agent Toolkit

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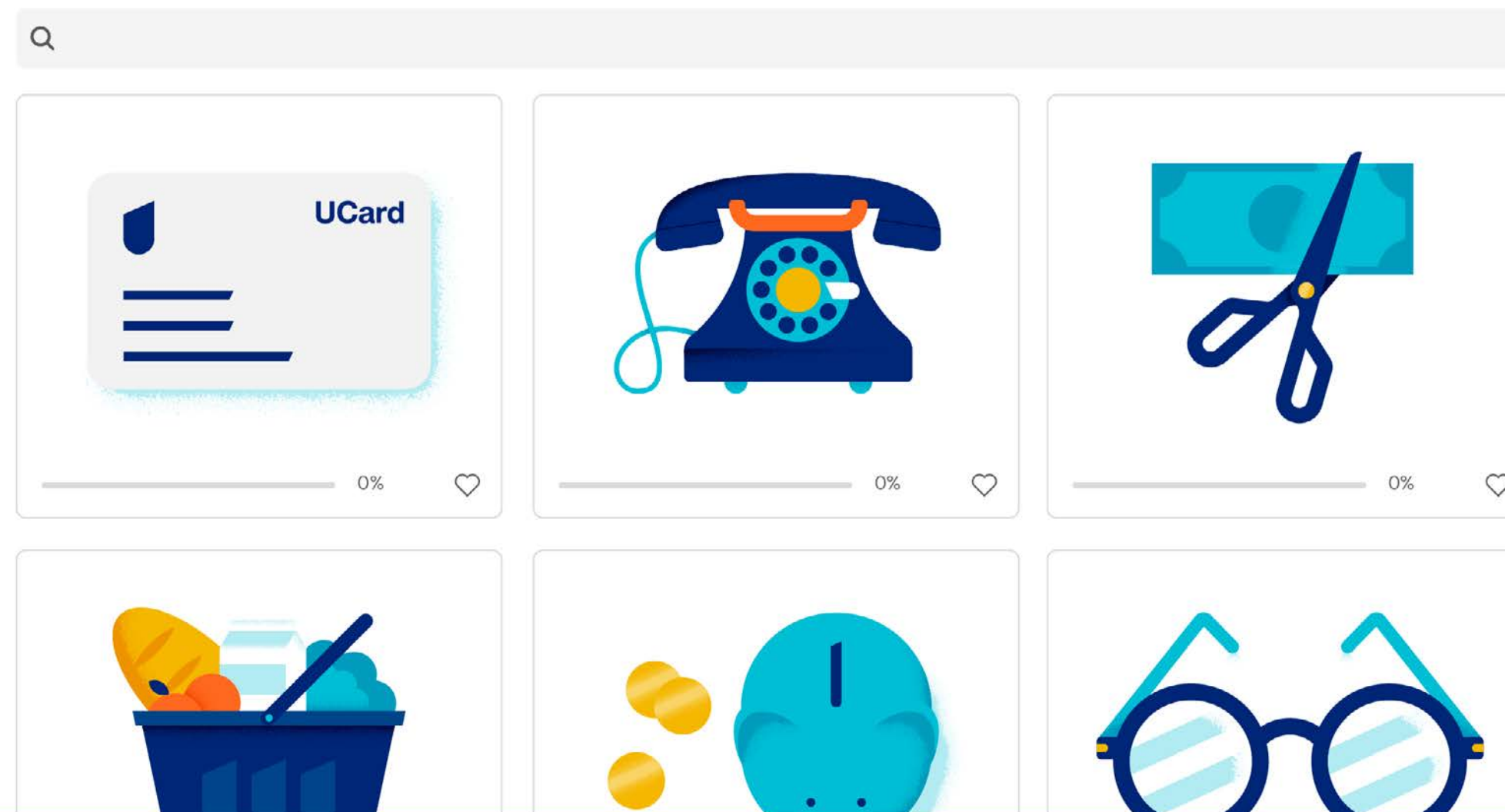


Last call

Download the Jarvis mobile app to be able to access Jarvis tools on the go.



Explore learning resources in Learning Lab!



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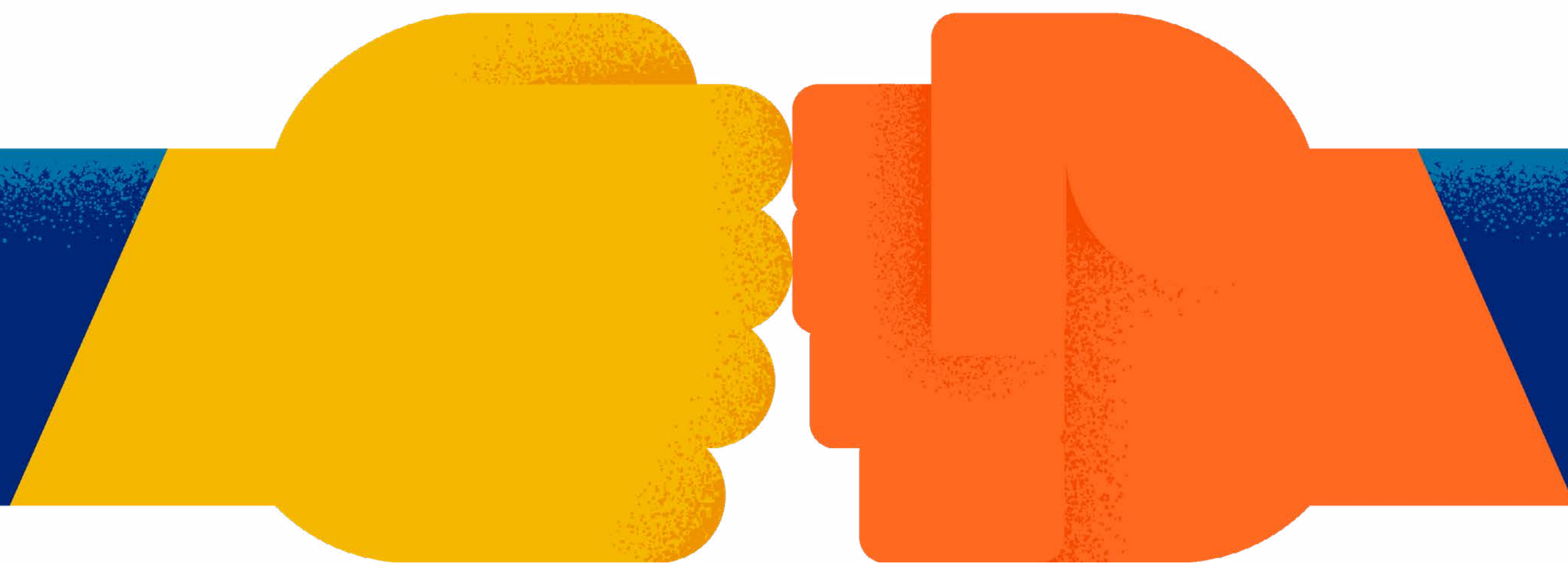
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Empower Your Members



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With the **UnitedHealthcare app**, members can view the Drug Price Estimator, claims, Rewards, OTC benefits and more. Plus, early engagement on the mobile app allows members to track their enrollment application!



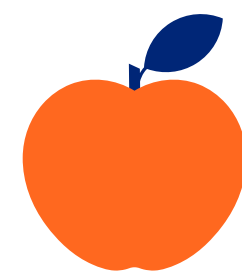
Enrolling a consumer requires your support, service and willingness to help them understand their plan and navigate their experience early on. Once enrolled, encourage members to download the UnitedHealthcare mobile app and engage early with all the features:



Track the status of their application with the Enrollment Tracker on the mobile app



Use the UCard Hub on the member website



Spend their OTC/Healthy Food/Utilities benefit credits (if applicable)



Opt-into and earn Rewards



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And don't forget to have a conversation about the **UnitedHealthcare UCard®**. The UCard is the member ID card and so much more for nearly all UnitedHealthcare individual Medicare Advantage members in 2025. It combines plan benefits and reward programs into a simpler, integrated experience with access to more than what members get with a traditional ID card.



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Want to learn more? Check out the Member Website and App Demo Experience course on Learning Lab for an interactive training that will walk you through the digital member experience.



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Full checklist

Use the 2025 Medicare Plan Checkup to connect with clients to see if their health needs have changed

Schedule Annual Notice of Change (ANOC) meetings for existing clients

Create a calendar to stay on task with events you are hosting

Send the Member ANOC Relationship Letter

Register for the 2025 AEP Retention Strategy National Webinar

Complete your UnitedHealthcare Certifications

Confirm you are appointed in the states you are licensed in

Develop your marketing plan

Pre-order your enrollment guides

Set goals to hold yourself accountable

Get to know your Jarvis tools and how to use them

Get familiar with JarvisEnroll

Attend a local rollout meeting

Get familiar with each plan's upcoming changes

Check out the Medicare Product Portal

Check out the 2025 Quick Reference Guides

Join a local market training

Prepare and practice your sales presentations

Call meeting locations to verify date and time for events

Strategize with your local UnitedHealthcare Sales Leader

Make sure you have a full supply of materials on hand

Review network changes

Gather UnitedHealthcare videos to show clients

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Need additional help?

Our dedicated Producer Help Desk (PHD) is here for you every step of the way.

Monday – Friday, 7am – 9pm CT



Live Chat via Jarvis



English 1-888-381-8581

Español 1-866-235-5990



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