



2027

Certification Checklist



Get certified with UnitedHealthcare and be prepared for the 2027 selling season! Whether you're new to certifications or a seasoned agent, this checklist helps you stay on track and complete the certifications required to sell the products in your portfolio.

Prepare

- Review 2027 Certification paths comparison table and Certification Decision Tree (see page 3) available in Jarvis
 - *Jarvis > Knowledge Center > Ready to Sell > Certification Overview*
- Read and review 2027 Certification Study Guide located in Learning Lab
 - *Jarvis > Quick Access > Agent Training (Learning Lab) > 2027 Certification Study Guide (tab at the top)*
- Attend a UnitedHealthcare Certification Readiness National Webinar
 - *Register in Jarvis > Knowledge Center > Agent Training > National Webinar Schedule*

Complete

In Learning Lab, complete the following:

- Step 1:** What's New – Industry Updates
- Step 2:** Certification Attestations (including state specific D-SNP attestations)
- Step 3:** Medicare Basics Assessment
- Step 4:** Ethics and Compliance Assessment
- Step 5:** AARP Assessment
- Complete Next Level certifications and/or modules (if applicable)
 - Dual Eligible and Chronic Special Needs Plans assessment (D-SNP/C-SNP)
 - *Required to Sell D-SNP or C-SNP*
 - Events Basics module (no assessment, attestation only)
 - *Required to conduct marketing/sales events*
 - Institutional and Institutional-Equivalent Special Needs Plans (I-SNP/IE-SNP) (available by invitation only)
 - Massachusetts Senior Care Options and Massachusetts One Care (available by invitation only)

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Next Steps

- Become familiar with UnitedHealthcare products and portfolio
 - *Jarvis > Quick Access > Medicare Product Portal*
 - *Jarvis > Quick Access > Find a Plan*
 - *Jarvis > Knowledge Center > Medicare Product Resources*
- Review your Agent Guide in Jarvis
 - *Jarvis > Knowledge Center > Reference Guides > Agent Guide*
- Attend National Webinars and local product trainings to expand your knowledge and selling opportunities
 - *Register in Jarvis > Knowledge Center > Agent Training > National Webinar Schedule and Local Training Schedule*



2027 Certifications Decision Tree



Agents must first review the “What’s New – Industry Updates” and agree to the Attestations before taking any assessments.

I want to sell or conduct...

I must pass these assessments

Base Level

Medicare Advantage Plans (MA) non-SNP
UnitedHealthcare, AARP, Erickson, Peoples Health, Preferred Care Networks or Preferred Care Partners branded plans

AARP Prescription Drug Plans (PDP)

AARP Medicare Supplement Insurance Plans

Successfully pass all 3 Base Level assessments:

- ▶ Medicare Basics (or transfer AHIP or NABIP passing score)
- ▶ Ethics and Compliance
- ▶ AARP

Next Level

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

Successfully pass all Base Level assessments **AND** Dual Eligible and Chronic Condition Special Needs Plans (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 module

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)*

One Care
UnitedHealthcare

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