



2027 Certification User Guide

Table of Contents

Annual Certification Requirements

UnitedHealthcare Certification Requirements	2
Certification Instructions – Standard.....	4
Certification Instructions – Fast Track	7

Logging into Jarvis

Accessing Jarvis – Registered Users	8
Attempts, Results and Progress	9
Achievements and Printing Certificates.....	10

Learning Lab System Requirements

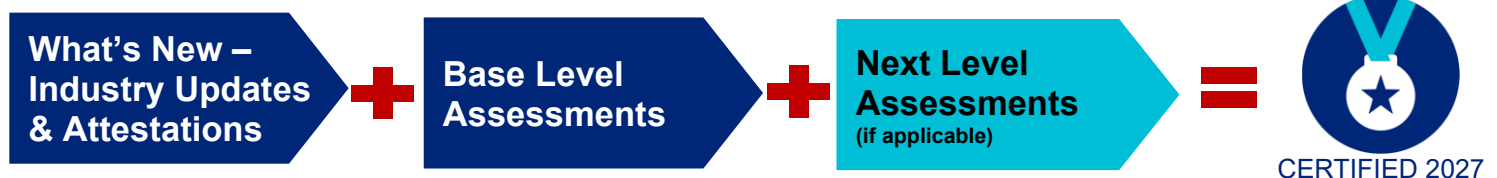
Desktop	12
Mobile Devices	12

2027 Annual Certification Requirements

UnitedHealthcare Certification Requirements

To solicit, present or sell any UnitedHealthcare Medicare products (*may include plans branded UnitedHealthcare, AARP, Erickson, Peoples Health, Preferred Care Networks or Preferred Care Partners*), 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.



A summary of how to certify is as follows:

Review any *recommended* courses needed:

- The **Study Guide** which contains the content needed to pass the assessments
- The **Certification Checklist and Decision Tree** to help you prepare and determine which courses to take
- The **User Guide** (you are reviewing now) with detailed step-by-step certification instructions
- The **Path Comparison Video** for a visual demonstration of everything you need to complete

Complete the *required* courses

- Review the **What's New – Industry Updates** document which summarizes key topics that are new for the year
- Review and sign the **2027 Certification Attestations**

Complete all 3 **REQUIRED** Base Level Assessments

- A passing score of **85% or higher within 6 attempts (70% for AARP)** is required
- 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: 1) Medicare Basics*, 2) Ethics & Compliance, 3) AARP


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

Complete any Next Level Modules and/or Assessments


- Events Basics module completion is required to conduct any marketing/sales events
- Dual Eligible and Chronic Condition Special Needs Plans (D-SNP/C-SNP) require a passing score of **85% or higher within 6 attempts**
- You may also be invited to sell other plans. These will appear on your Home Page in Learning Lab if you have been invited.
 - Institutional and Institutional-Equivalent Special Needs Plans (I-SNP/IE-SNP)
 - Senior Care Options
 - One Care



Here is a Decision Tree to help you understand your options:




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	<p>Medicare Advantage Plans (MA) non-SNP UnitedHealthcare, AARP, Erickson, Peoples Health, Preferred Care Networks or Preferred Care Partners branded plans</p> <p>AARP Prescription Drug Plans (PDP)</p> <p>AARP Medicare Supplement Insurance Plans</p>	<p>Successfully pass all 3 Base Level assessments:</p> <ul style="list-style-type: none"> ▶ Medicare Basics (or transfer AHIP or NABIP passing score) ▶ Ethics and Compliance ▶ AARP
Next Level	<p>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</p>	<p>Successfully pass all Base Level assessments AND Dual Eligible and Chronic Condition Special Needs Plans (D-SNP/C-SNP) assessment</p>
Next Level	<p>Events Basics To conduct marketing/sales events, host a retail kiosk, or conduct a community meeting</p>	<p>Successfully pass all Base Level assessments AND the Events Basics module</p>
Next Level	<p>Institutional and Institutional-Equivalent Special Needs Plans (I-SNP/IE-SNP)</p>	<p>Successfully pass all Base Level assessments AND Institutional and Institutional-Equivalent Special Needs Plans (I-SNP/IE-SNP) assessment <i>(available by invitation only)</i></p>
Next Level	<p>Senior Care Options UnitedHealthcare</p>	<p>Successfully pass all Base Level assessments AND Senior Care Options assessment <i>(available by invitation only)</i></p>
Next Level	<p>One Care UnitedHealthcare</p>	<p>Successfully pass all Base Level assessments AND One Care assessment <i>(available by invitation only)</i></p>

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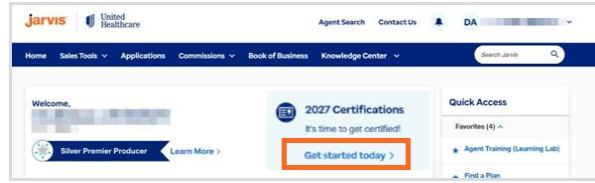
AHIP or NABIP Certification for our EDC Partners

America's Health Insurance Plans (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 Insurance Plans). *See instructions provided in this guide.*



Certification Instructions – Standard

From Jarvis, click on the Certification **Get Started** tile to begin.



If you don't see the tile, go to **Knowledge Center** and then click on **Ready to Sell**.



From the **Certification Overview** tab, review the Certification Path **comparison chart** to determine your path.

Ready to Sell
Get certified, learn how to grow your business, and get rewarded through our loyalty programs

Certification Overview | New Agent Resources | Grow Your Business | Premier Producer

Get Certified Today!
Compare Certification Paths before launching Learning Lab to start your preferred path.
Launch Learning Lab

View your Certification Status!
Learn about products you are certified to sell.
Certification Status

Get Certified
Certification modules, taken during your onboarding and annually after that, provide you with an overview of the Medicare program, an understanding of Medicare insurance options and the rules and regulations that guide your marketing and sales activities.

2027 Certifications Instructions [🔗](#) | 2027 Certifications User Guide / English [🔗](#)
2027 Certifications Decision Tree [🔗](#) | 2027 Certifications User Guide / Español [🔗](#)

2027 Certification paths
Choose your preferred certification path, you only need to complete one path to certify!

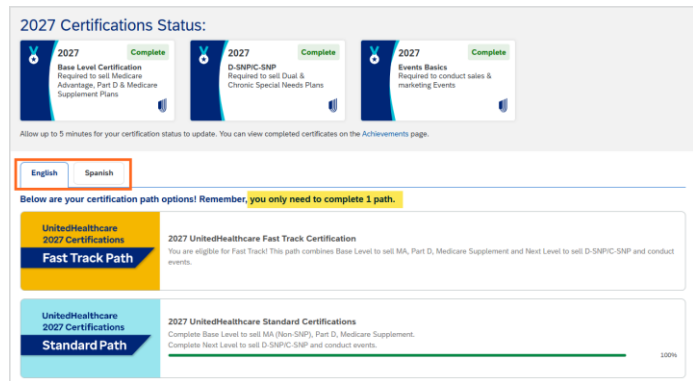
	Fast Track	Standard	AHIP	NABIP
Launch Date	06/01/2026	06/08/2026	Late June	Late June
Overview	Fast Track Combines Base Level & Next Level Assessments into one	Standard Certifications Path	Agents who want to transfer AHIP use this path	Agents who want to transfer NABIP use this path
Eligibility	Premier Agents and Fast Track Qualifications	All Agents	Agents transferring AHIP	Agents transferring NABIP
Language Available	English	English/Español	English/Español	English/Español
Attempts Allowed per Assessment	2	6	6	6
Base Level Assessments: Certifies you to sell UnitedHealthcare Medicare Advantage (non-SNP), Part D and Medicare Supplement Plans	Fast track	Standard	AHIP	NABIP
Medicare Basics Assessment	AI-In-One Assessment 85% Passing Score	85% Passing Score	Credit with AHIP Transfer	Credit with NABIP Transfer
Ethics and Compliance Assessment		85% Passing Score	85% Passing Score	85% Passing Score
AARP Assessment		70% Passing Score	70% Passing Score	70% Passing Score
Next Level Assessments/Modules: After you successfully pass all Base Level assessments, you may then take any of the Next Level requirements to sell D-SNP/C-SNP and conduct sales/marketing events		85% Passing Score	85% Passing Score	85% Passing Score
D-SNP /C-SNP Assessment		85% Passing Score	85% Passing Score	85% Passing Score
Events Basics (Module Only)		Complete Module	Complete Module	Complete Module

*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. See below for AHIP and NABIP instructions.*

You will land on the Certification page in Learning Lab.

You will see your certification status at the top of the page. If you haven't started yet, click on the path that you want to take.

Remember, you only need to complete one path. You may select the Spanish tab if that is your preferred language.



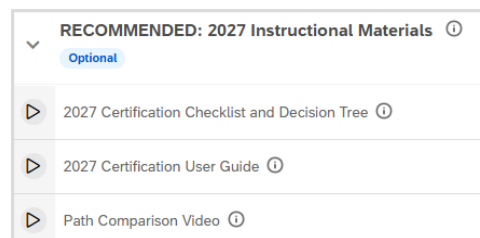
When the path opens in Learning Lab, you will see a description and some instructions.

If you select a path but decide that you would prefer a different path, click the back button and select a different path.

*Note: If you are eligible for **Fast Track Certification**, please see the instructions at the end of this section.*

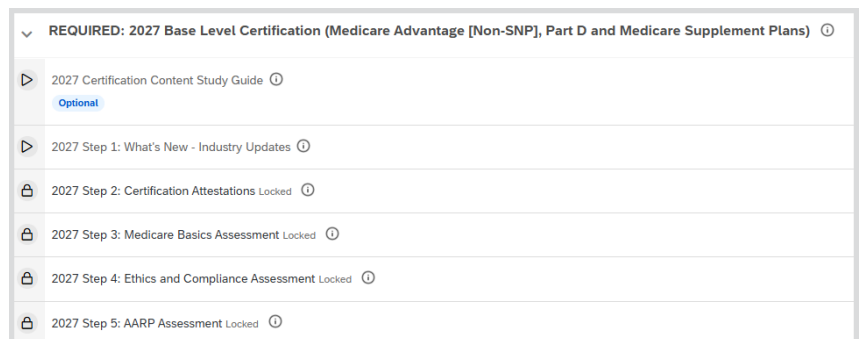


Below the description, you will see some **RECOMMENDED courses**. These are optional but highly recommended.



Complete all the **REQUIRED courses**:

- Certification Content Study Guide (optional)
- What's New – Industry Updates document
- Certification Attestations
- 3 Base Level Assessments (Medicare Basics, Ethics & Compliance, and AARP).



Six attempts are allowed on each assessment. (An attempt is counted when you complete the assessment.)

Reviewing the What's New – Industry Updates document, completing the Attestations 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 and Medicare Supplement Plans.



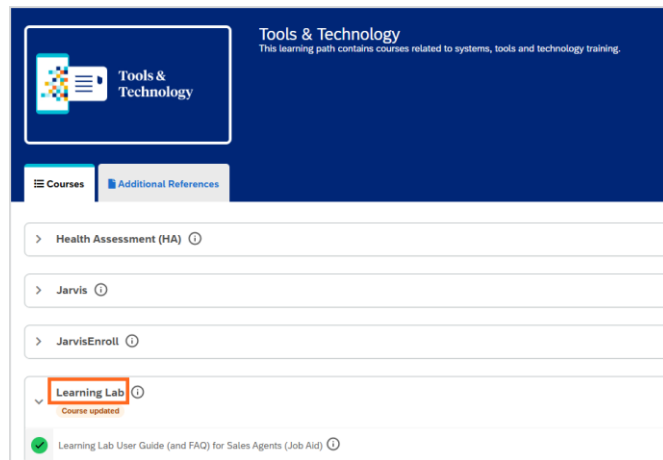
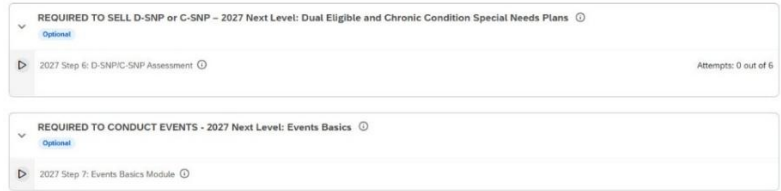
NOTE! The Study Guide is also available from the Home Page in the Certification Study Guide tab all year long as a reference.

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 called Invitation Only.

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.



Certification Instructions – Fast Track

If you are eligible for Fast Track Certification, use the Fast Track Path in Learning Lab.

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



2027 UnitedHealthcare Fast Track Certification
Congratulations! You are eligible and invited to take a single Fast Track certification assessment. You have 2 attempts to pass this assessment with a score of 85% or higher.

Successfully passing this assessment will give you credit for all Base Level and Next Level assessments and will certify you:

- To sell Medicare Advantage (non-SNP), Part D, Medicare Supplement, Dual Eligible Special Needs and Chronic Condition Special Needs Plans
- To conduct and report marketing/sales events

By passing the Fast Track assessment, you do not need to take the Standard Path or transfer AHIP/NABIP.

However, if you fail both attempts of the Fast Track assessment, you are entitled to 6 attempts of each assessment within the Standard Certification Path (or AHIP/NABIP). Agents who fail all attempts of an assessment in the standard certification path are not permitted to take the Fast Track option.

Note: You are not required to take the Fast Track assessment and may elect to take the Standard Certification Path instead (or the AHIP or NABIP Path). If you have been invited to sell I-SNP/IE-SNP, Senior Care Options or One Care, you will see these courses on your Certifications Page.

Below the description, you will see some courses. Complete all the **REQUIRED** courses:

- Certification Content Study Guide (optional)
- What's New – Industry Updates document
- Certification Attestations
- Fast Track Assessment



2027 UnitedHealthcare Fast Track Certification (Base Level: Medicare Advantage, Part D, Medicare Supplement and Next Level: D-SNP/IC-SNP, Events Basics)	
2027 Certification Content Study Guide	Optional
2027 Step 1: What's New - Industry Updates	
2027 Step 2: Certification Attestations	
2027 Step 3: Fast Track Assessment	Attempts: 0 out of 2

Reviewing the What's New – Industry Updates document, completing the Attestations and successfully passing the Fast Track Assessment with an 85% or higher score will give you credit for all Base Level and Next Level assessments and will certify you:

- To sell Medicare Advantage (non-SNP), Part D, Medicare Supplement, Dual Eligible Special Needs and Chronic Condition Special Needs Plans
- To conduct and report marketing/sales events

Successfully passing Fast Track does not provide credit for any invitation only modules such as I/IE-SNP, Senior Care Options or One Care.



Logging into Jarvis

Accessing Jarvis – Registered Users

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

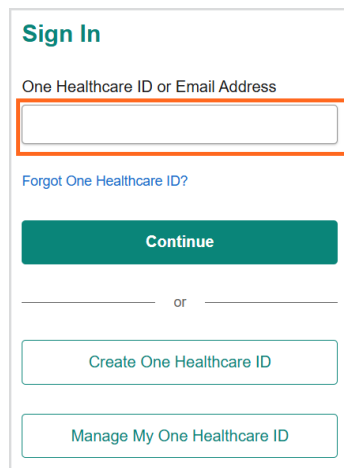


Welcome to Jarvis
All your tools in one place hassle-free. Agents/Brokers sign in:

[Sign in with One Healthcare ID](#)

[Don't have a One Healthcare ID? Register](#)

- Enter your **One Healthcare ID** and click **Continue**.
- Enter your **password** and click **Continue**



Sign In

One Healthcare ID or Email Address

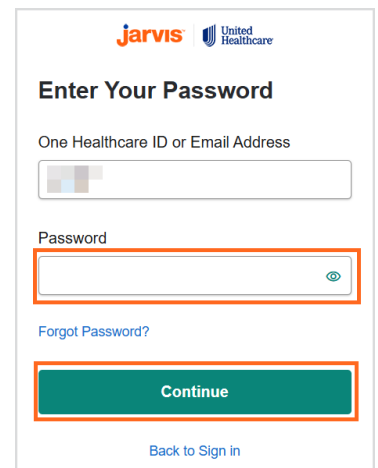
[Forgot One Healthcare ID?](#)


[Continue](#)

or

[Create One Healthcare ID](#)

[Manage My One Healthcare ID](#)



jarvis 

Enter Your Password

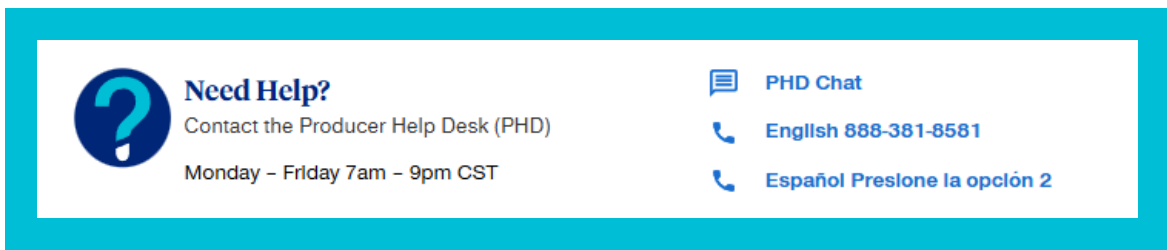
One Healthcare ID or Email Address


Password


[Forgot Password?](#)


[Continue](#)


[Back to Sign in](#)



 **Need Help?**
Contact the Producer Help Desk (PHD)
Monday – Friday 7am – 9pm CST

 [PHD Chat](#)

 [English 888-381-8581](#)

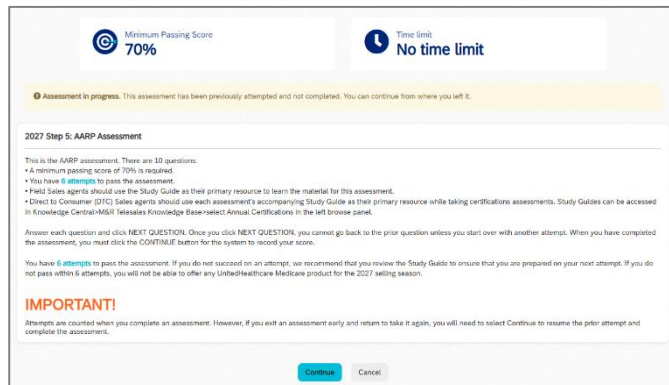
 [Español Preslone la opción 2](#)



Attempts, Results and Progress

ATTEMPTS

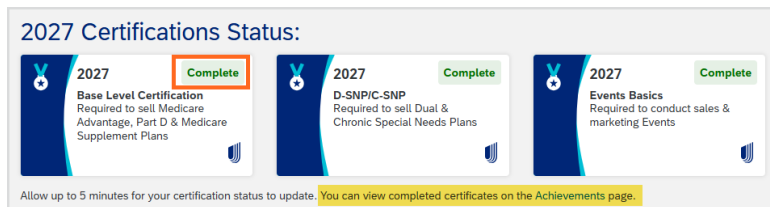
Attempts are counted when you complete an assessment. If you exit an assessment early and return to take it again, you will need to select **Continue** to resume the prior attempt and complete the assessment.



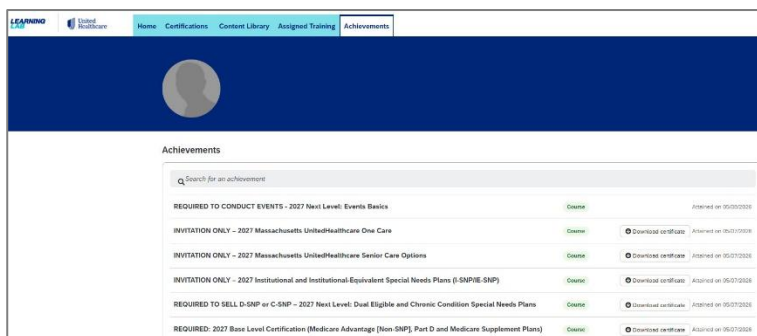
RESULTS AND ACHIEVEMENTS

When you complete an assessment (either pass or fail), you will see the results. You will also be able to download a certificate of completion if the assessment completed the certification path.

On the certifications page, you will see your status. You will also see a link to the achievements page.



You can also click on the Achievements page tab to see your list of completions and download a certificate.



Field and eAlliance agents will receive email confirmation when the following certification steps or paths are complete:

- AHIP/NABIP score has been successfully transmitted
- Fast Track Path has been successfully completed
- Standard, AHIP or NABIP Path has been successfully completed (sent when the last module, Events Basics, is complete)

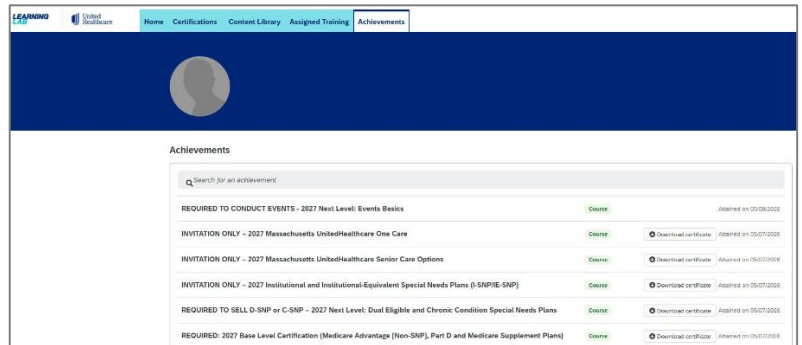


Achievements and Printing Certificates

Note: Certificates are available for Fast Track, Base Level, C/D-SNPs, Events Basics, and invitation only assessments.

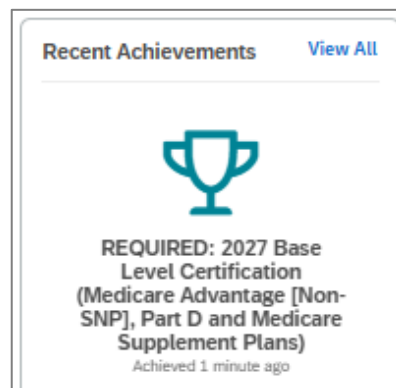
To view a list of your completed courses and modules:

- 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.

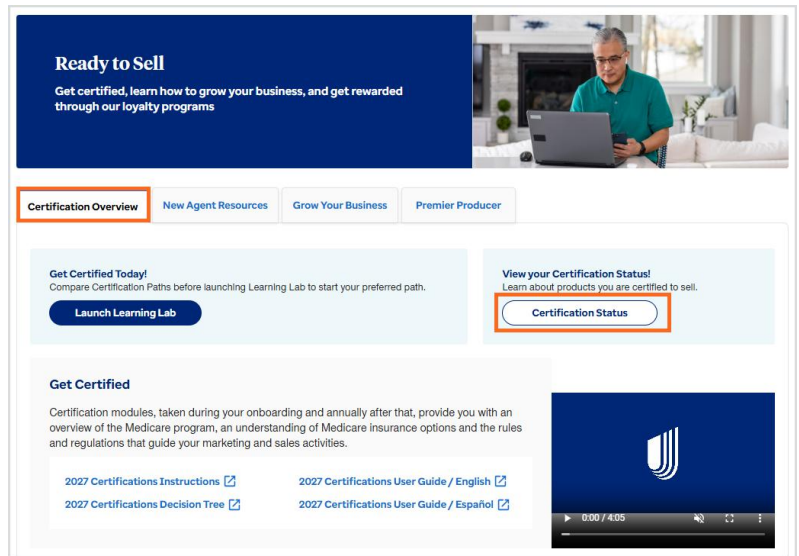


For a quick view of your most recent achievements:

- From the Learning Lab 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, go to **Ready to Sell** and click on the **Certification Overview** tab. Then click on the **Certification status**.



OR

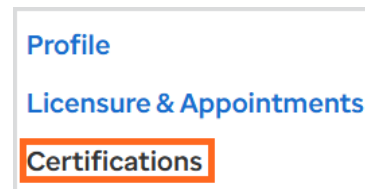
From any page in Jarvis, click on your **name** on the top menu bar.



- Click on Manage Profile.



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



- A list of your current certifications will appear.

Current Certifications			Results per page 15
Year	Certificate Name	Completion Date	

Note: If you take Fast Track, you will also see the Base Level and Next Level certifications listed in Jarvis.



Learning Lab System Requirements

For optimized viewing, broadband internet connection is recommended.

Desktop

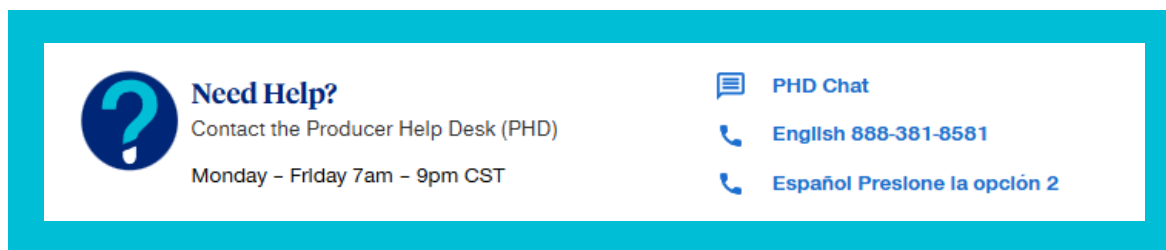
- Web browser:
 - Microsoft Edge
 - Google Chrome
 - Mozilla Firefox
 - Apple Safari
- JavaScript and cookies enabled


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)
Monday - Friday 7am - 9pm CST

 **PHD Chat**

 **English 888-381-8581**

 **Español Presione la opción 2**

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

