UnitedHealthcare[®]

2024 Certification User Guide

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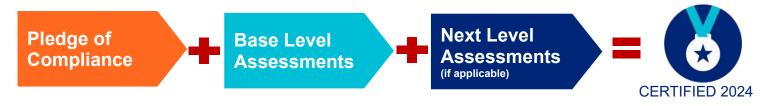
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2024 Annual Certification Requirements

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.

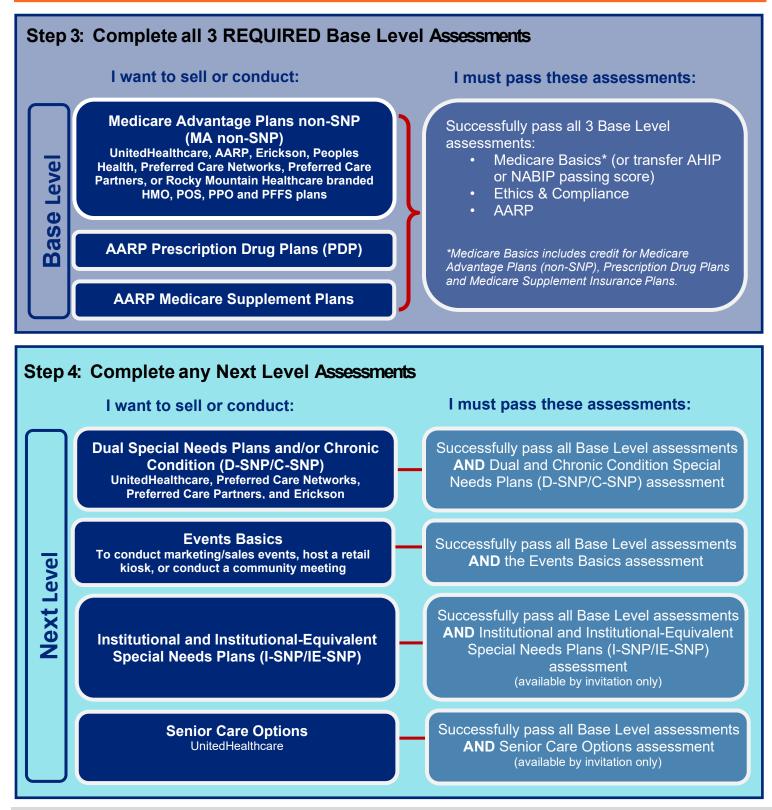
AHIP or NABIP Certification for our EDC Partners

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



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Certification Instructions

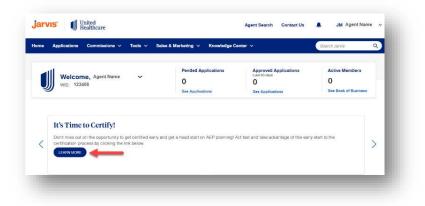


From Jarvis, click on the certification path link near the top of the screen (in the news article scroll). This will take you directly to Learning Lab and the courses you need to complete for certification. Spanish is also available once you enter the Learning Lab path.

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 Certifications Tax no certification at only	2024 UnitedHealthcare Certifications 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 dasessments) - Suby Guide (all the content you need to study to pass the required assessments) - Suby Guide (all the content you need to study to pass the required assessments) - Suby Course: to sell D-SNP or C-SNP (must also complete all Base Level Courses) - evel Courses; - evel Courses; - to share ben invited to sell t-SNP/IE-SNP or Senior Care Options, you will see these courses on your Hame Page evel Courses; - output: Courses; - output: Courses; - output: Care Page evel Course; - evel C
	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 (i)
	2024 Certification User Guide (j)
	How To Certify (video 3:40) (j)
	How To Certify (course) () Oth My Score
~	STUDY GUIDE: 2024 Certification Content (to study for the assessments)
	2024 Certification Content Study Guide 3 016 My Score

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

	© 2024 Fast Trac	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.

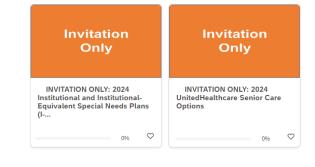
For example, if you want to sell D-SNP and/or C-SNP, complete that assessment; if you want to conduct any marketing events, complete the Events Basics assessment.

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	1
	.81

~	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) (Locies) 🕕	Results
0	2024 Ethics and Compliance Assessment (Lockel) ①	Results
0	2024 AARP Assessment (Looko) () 70% Passmak: 100% My Sone	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 👔 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.

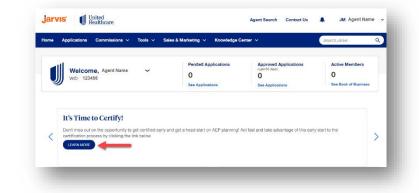


Enter your **One Healthcare ID** and **Password.**

Click on Sign In.

Sign In With Your One Healthcare ID One Healthcare ID or email address Password Sign In Forgot One Healthcare ID Forgot Password Forgot One Healthcare ID Forgot Password Manage your One Healthcare ID Torgot Password Manage your One Healthcare ID Torgot Password

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
Tex-interactions Take one certification path only	for Multi-Carrier Call Center
2024 UnitedHealthcare Certificat	2024 UnitedHealthcare Certificat
REQUIRED: 2024 Pledge of Comp	liance (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.

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.

Medicare + Fraud, Waste, and Abuse United Healthcan Quick Links Medicare + Fraud, Waste, and Abuse (MFWA) Medicare FAO Online Course AHIP Insurance Ed AHIP Conference AHIP Home Contact Us For Technical Suppo ne: 858.234.6909 Email: Support@WHIP Forgot your usernam Forgot your passwor

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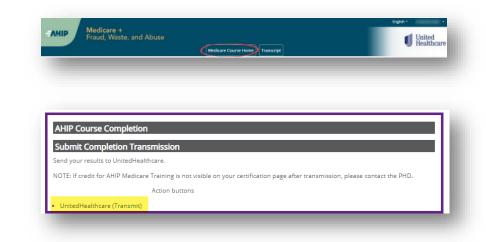
× 🕂 Login

A http:



АНІР	Medicare + Fraud, Waste, and Abuse
Quick Links	
AHIP Insurance Educati	on
AHIP Conferences	
AHIP Home	

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 C 2023 AHP 🗙 📑 Deshboard and close the AHIP tab. CA 2 . a ie 12 On the Learning Lab tab, click × + CO the **EXIT** button to return to the main page where the 2024 2024 AH AHIP will appear completed upon successful transmission. 🔨 REQUIRED: 2024 Base Level Certification for AHIP (Medicare Advantage (Non-SNP), Prescription Drug and Medicare Supplement Plans) 🕕 Proceed with completing the 2024 AHIP remaining REQUIRED Base 2024 Ethics and Compliance Assessment (i) t 096 My Sci Level assessments as well as 2024 AARP Assessment (i) nark 0% My Sc any Next Level assessments A 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 (1)

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

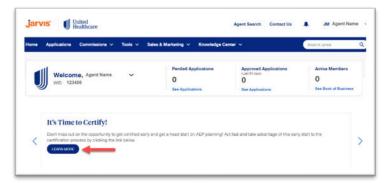
We are pleased to offer another third-party certification program as a way to earn credit for the UnitedHealthcare Basics Assessment with a passing score from the National Association of Benefits and Insurance Professionals (NABIP).

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.)

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
Sign In With Your One Healtheare ID
Sign In With Your One Healthcare ID One Healthcare ID or email address One Healthcare ID or email address Password Password Wati Sone Healthcare ID What is One Healthcare
Sign In
Forgot One Healthcare ID Forgot Password

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)

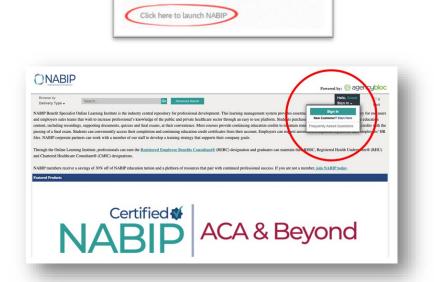
2024 NABIP

2024 Ethics and Compliance Assessment (1) 89% Passmark 0% My Score 2024 AARP Assessment (1) 70% Passmark 0% My Score

Click on the 2024 NABIP module.

Click on the link Click here to launch NABIP.





2024 NABIP

2024 Base Level Certification for NABIP (Medicare Advantage (Non-SNP), Prescription Drug and Medicare Supplement Plans) 🛈

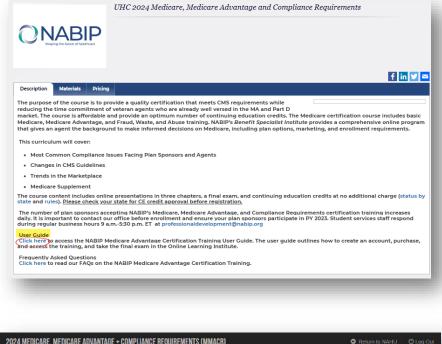
On the **Sign In** page, you can enter your login credentials or create a new account.

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.





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: Second system 2024 NABIP x + - Image: Second system X Image: Second system Image: Second system
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 () 2024 Ethics and Compliance Assessment () 2024 Ethics and Compliance Assessment () 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

	ome to Jarvis
All your tools	in one place hassle-free
Sign in wi	th One Healthcare ID
	ne Healthcare ID? Register
Questions abo	ut One Healthcare ID and Mobile App? See our FAQ
Sian In V	Nith Your One Healthcare ID
-	With Your One Healthcare ID
One Healthcar	
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One Healthcar	
One Healthcar	

 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 🔨
Learning Lab
Training & Certifications
Training and Guides
Resources

Training & Certification



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.

	ningLab
	r you're a new agent or a seasoned pro, Learning Lab is your one-stop shop for UnitedHealthcare Medicare Solutions training tifloations.
 The Proc How How 	Medicare industry and the value of UnitedHealthcare to members suite of tools UnitedHealthcare offers to improve the agent experience luct and grogram for members with a UnitedHealthcare plan to remain compliant while selling UnitedHealthcare to grow your business through industry leading sales skills so many more!
	ation modules, taken during your onboarding and annually after that, provide you with an overview of the Medicare program, erstanding of Medicare insurance options and the rules and regulations that guide your marketing and sales activities.
For mo Spanis	re details on the certification process and technical requirements open the Certification User Guide in either English or h.

Tools & Technology	to sy
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> Health Assessment (HA) ③	I
> Jarvis 🛈	
> LEAN (j)	1
✓ Learning Lab ③	
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Welcome to Learning Lab (Video 2:23)	-1
Learning Lab User Guide (and FAQ) for Sales Agents (Job Aid) (1) Attending Instructor-Led Training Using Zoom (Job Aid) (1)	
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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
	REQUIRED: 2024 Base Level Certification (Medicare Advantage [Non-SNP], Prescription Drug and Medicare Supplement Plans) 🕕
3	REQUIRED: 2024 Base Level Certification (Medicare Advantage (Non-SNP), Prescription Drug and Medicare Supplement Plans) () 2024 Metern Revs Assumet (Medicare Advantage (non-SNP), Prescription Drug and Medicare Supplement Plans) () ()
5	2024 Medicare Sevice Assessment (Medicare Astachage Incn-SAF), Prescription Drug and Medicare Supplement Plans) (Jocked) 🕧 Descin

Attempts 2	Time Taken (1) 00:00:13:45	Score (Passmark 85%) 100% - Passed	

Achievements and Printing Certificates

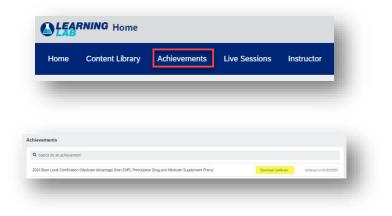
Note: certificates are available for Base Level, SNPs, and Events Basics assessments.

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

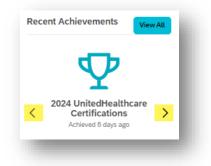
- Click on the Achievements tab.
- A list of all your achievements will appear with the achievement date.
- Click **Download certificate** to obtain a printable copy.
- A PDF of the certificate will appear. Open the PDF and print the certificate.

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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	Profile Licensure & Appointments Certifications
Current Certifications	

Certificate Name

Completion Date

• A list of your current certifications will appear.

Year ~

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.