



2026 Certification User Guide

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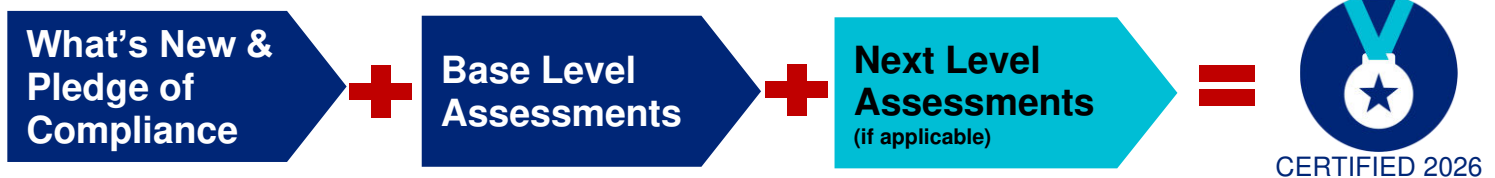
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2026 Annual Certification Requirements

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 4-step summary of how to certify is as follows:

Step 1: Review any *recommended* courses needed:

- The **STUDY GUIDE** which contains the content needed to pass the assessments
- The **DECISION TREE** to help you 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

Step 2: Complete the *required* courses

- Review the **WHAT'S NEW** document which summarizes key topics that are new for the year
- Review and sign the **PLEDGE OF COMPLIANCE**

Step 3: 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

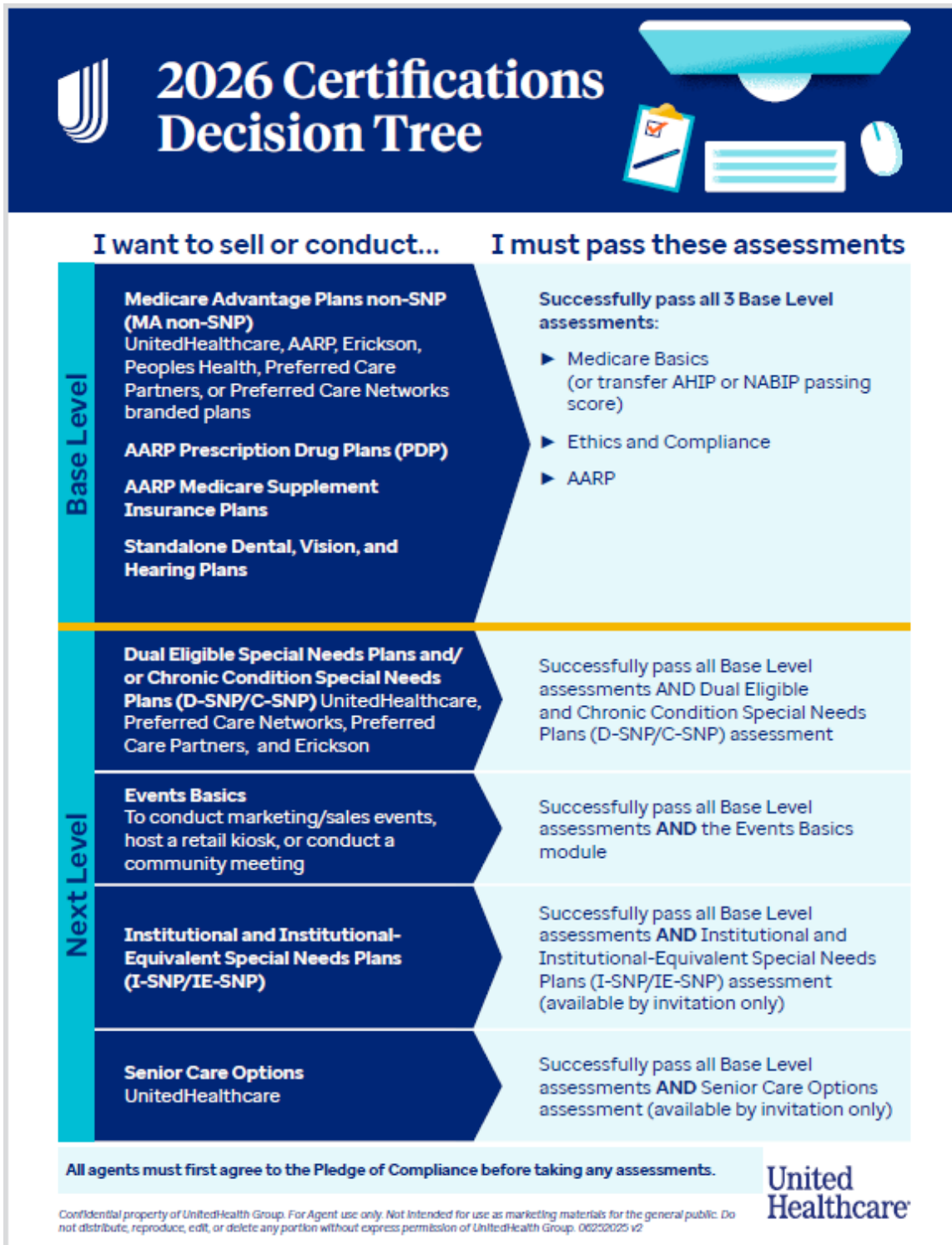
** Medicare Basics includes credit for Medicare Advantage Plans (non-SNP), Prescription Drug Plans, Medicare Supplement Insurance Plans and Standalone Dental, Vision and Hearing.*

Step 4: 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)
 - Massachusetts Senior Care Options
 - Massachusetts One Care



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



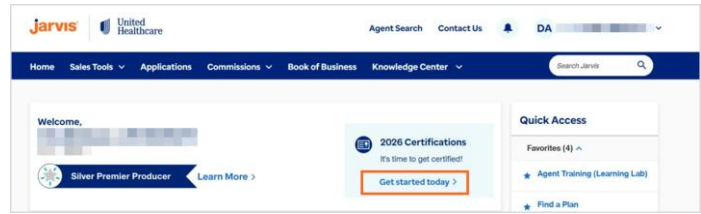
AHIP or NABIP Certification for our EDC Partners

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.

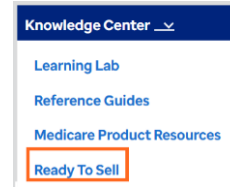


Certification Instructions

1 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.

Once you determine your path, click on the **Launch Learning Lab** button to take you to the Certification page.

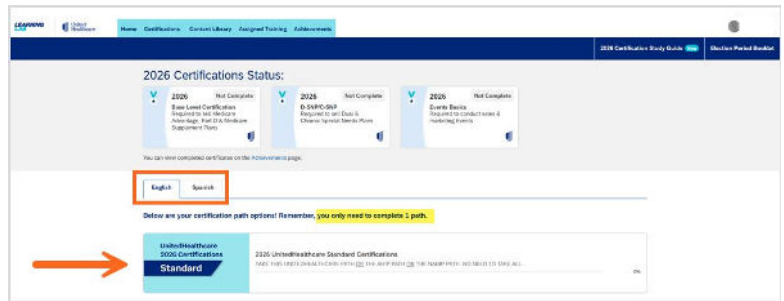
	Fast Track	Standard	AHIP	NABIP
Launch Date	06/01/2025	06/09/2025	Late June	Late June
Overview	Fast Track Combines Base Level & Next Level Assessments into one	Standard Certifications Path	Agents who want to transfer AHIP use this path	Agents who want to transfer NABIP use this path
Eligibility	Premier Agents and Fast Track Qualified Agents	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	All-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.



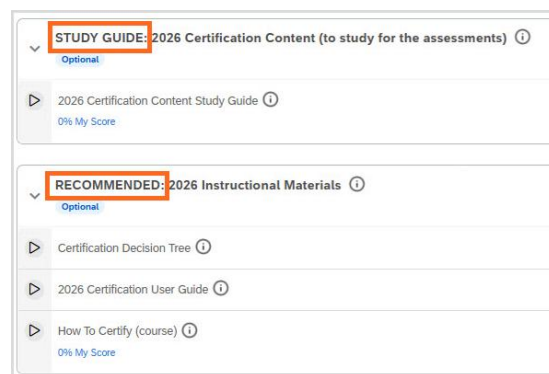
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When the path opens in Learning Lab, you will see a description and some instructions.

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



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.



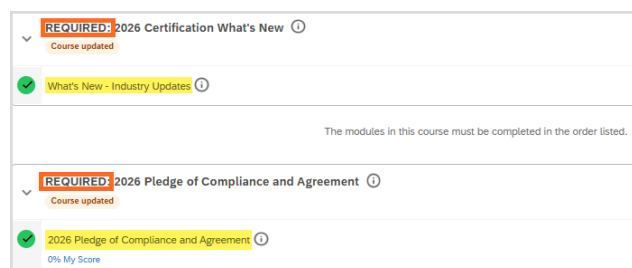
NOTE! The Study Guide is also available from the Home Page in the Certification Study Guide tab all year long as a reference.



3

Complete all the **REQUIRED** courses:

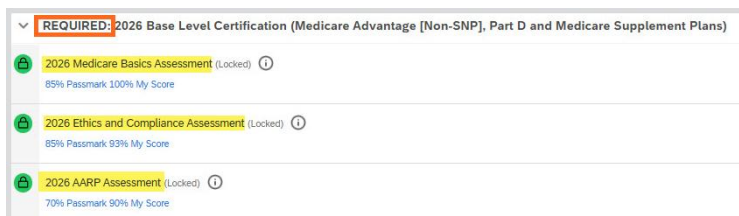
- What's New document
- Pledge of Compliance
- 3 Base Level Assessments (Medicare Basics, Ethics & Compliance, and AARP).



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.*

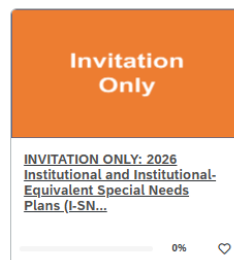
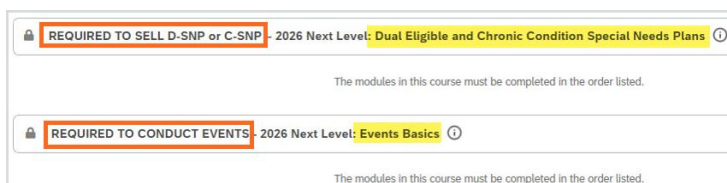


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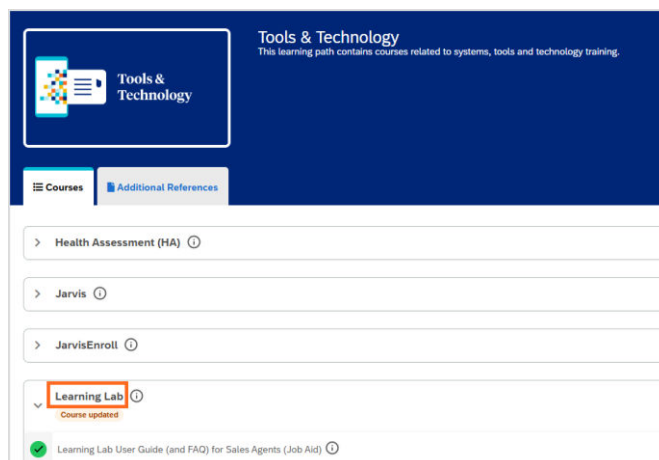
Complete any Next Level assessments if you wish to certify to sell more than the base level.

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.



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.



AHIP Certification Instructions

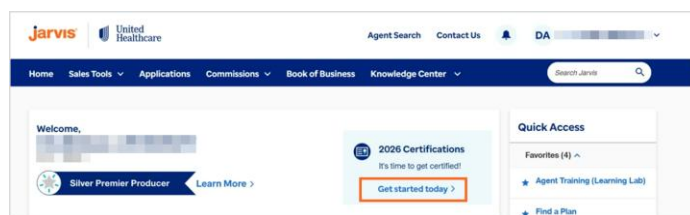
We are pleased to once again accept the AHIP Medicare + Fraud, Waste and Abuse Training from American’s Health Insurance Plans. Agents choosing to pursue AHIP via UnitedHealthcare are eligible to receive a \$50 discount by using our custom link in Learning Lab.

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).

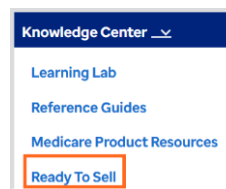
All agents are required to review the **What’s New** document and sign the **Pledge of Compliance**. Agents certifying via the AHIP path must transfer a passing AHIP score (via our custom link) and then complete the remaining **Base Level** certification assessments: Ethics & Compliance and AARP. Passing all three will certify you to sell MA (non-SNP) Plans, Prescription Drug Plans (PDP), Medicare Supplement Plans, and Standalone Dental, Vision and Hearing Plans. (AHIP Certification satisfies the requirement for the UnitedHealthcare Medicare Basics Assessment.)

REMINDER: For agents choosing to complete the 2026 AHIP, either directly from the AHIP website or through another carrier, you are still required to follow the below directions to transmit your results to UnitedHealthcare and receive credit for the equivalents. The UnitedHealthcare discount will be forfeited if you choose to certify directly from the AHIP website or through another carrier.

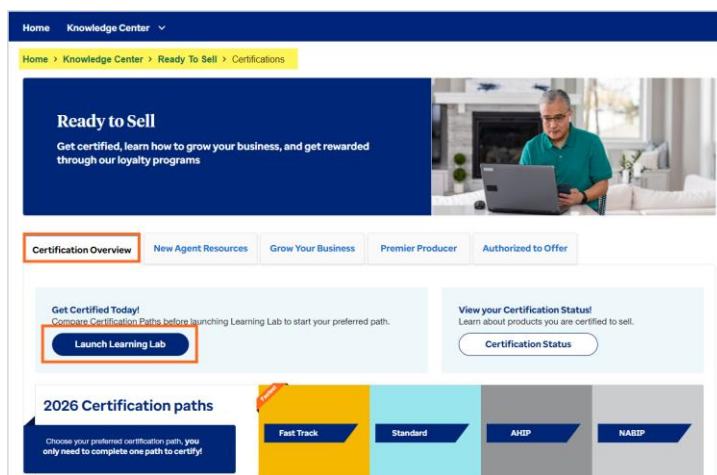
From Jarvis, click on the Certification **Get Started** tile to begin.



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



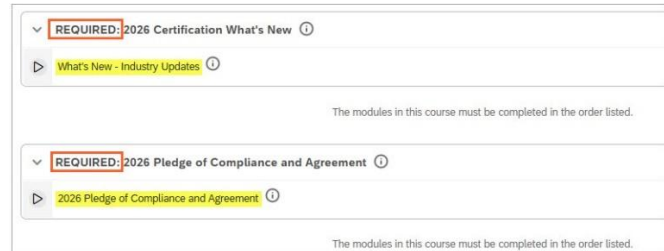
Click on the **Launch Learning Lab** button to take you to the Certification paths.



You will see the AHIP Certification learning path. Click on the AHIP path to open it.



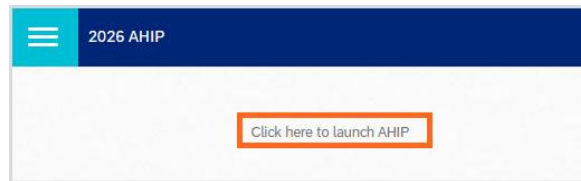
Review the **What's New** and complete the **Pledge of Compliance**.



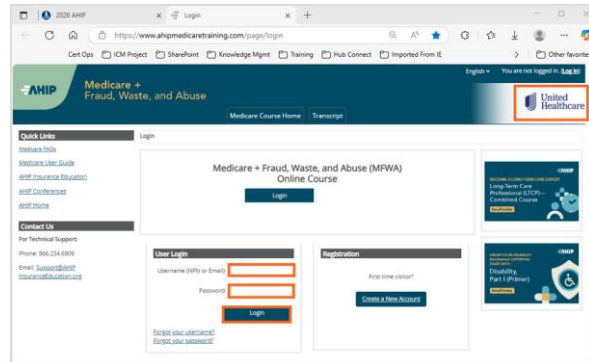
Click on the **2026 AHIP** module.



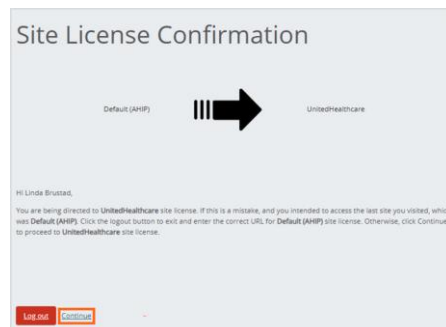
Click on **Click here to launch AHIP**.



A new tab will open on the AHIP website displaying the UnitedHealthcare logo in the upper right corner where you will enter your **AHIP Username** and **Password** and click the **Login** button.



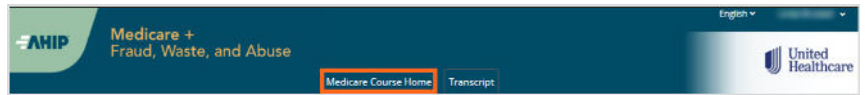
If you receive a pop-up message directing you to the UnitedHealthcare site license, click **Continue**.



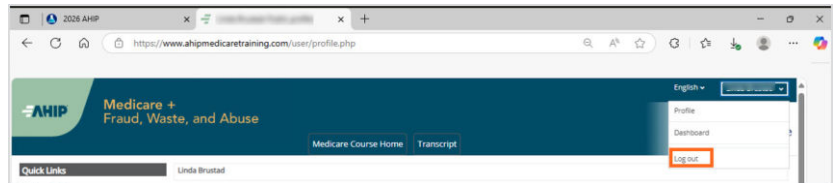
If you require assistance with your AHIP purchase, please refer to the **Medicare User Guide** located on the AHIP site.



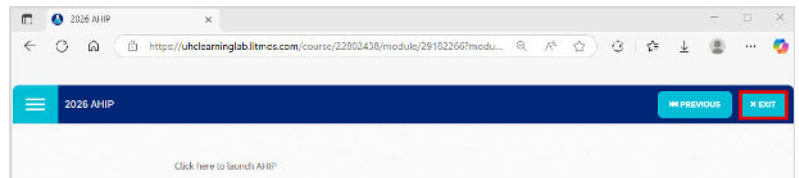
To send your results to UnitedHealthcare go to the **Medicare Course Home** tab, scroll to the bottom of the screen to click the **UnitedHealthcare (Transmit)** link.



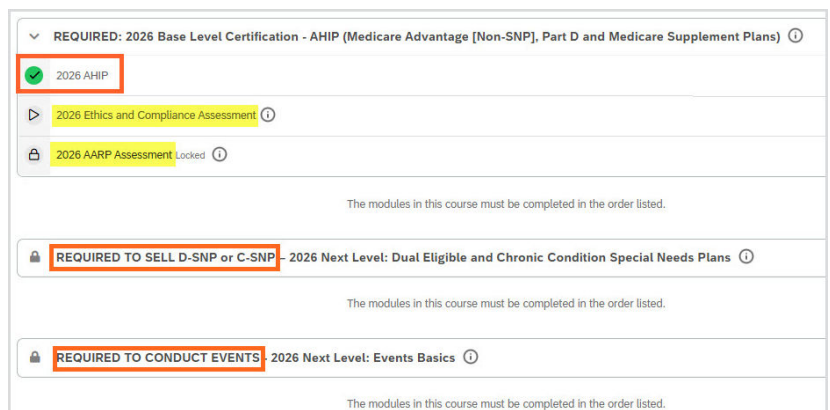
Log out of your AHIP account and close the AHIP tab.



On the Learning Lab tab, click the **EXIT** button to return to the main page where the 2026 AHIP will appear completed upon successful transmission.



A green checkmark will indicate that your AHIP score was transferred to UnitedHealthcare.



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**.



NABIP Certification Instructions

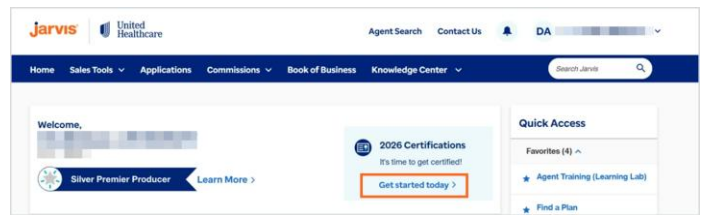
We are pleased to offer another third-party certification program as a way to earn credit for the UnitedHealthcare Medicare Basics Assessment with a passing score from the National Association of Benefits and Insurance Professionals (NABIP).

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 review the **What's New** document and 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 remaining **Base Level** certification assessments: Ethics & Compliance and AARP. Passing all three will certify you to sell MA (non-SNP), Prescription Drug Plans (PDP), Medicare Supplement Plans, and Standalone Dental, Vision and Hearing Plans. *(NABIP Certification satisfies the requirement for the UnitedHealthcare Medicare Basics Assessment.)*

REMINDER: For agents who purchase the 2026 NABIP training through the UnitedHealthcare link, the completion will be reported to UnitedHealthcare upon passing the final exam. However, agents who choose to purchase and complete their 2026 NABIP training outside of UnitedHealthcare (e.g., either directly from the NABIP website or another carrier) will need to contact the Producer Help Desk (PHD) to submit a request to transfer their results.

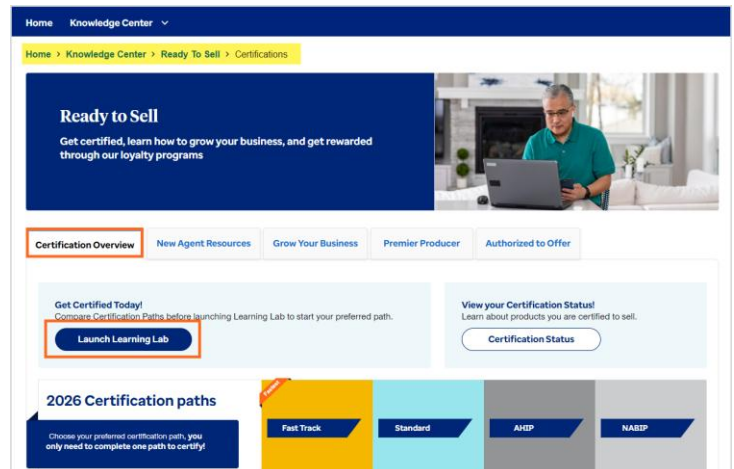
From Jarvis, click on the Certification **Get Started** tile to begin.



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



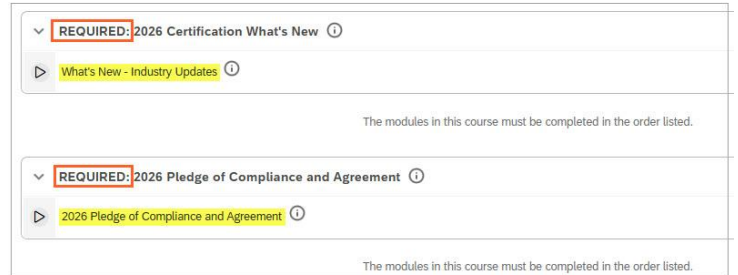
Click on the **Launch Learning Lab** button to take you to the Certification paths.



You will see the NABIP Certification learning path. Click on the NABIP path to open it.



Review the **What's New** and complete the **Pledge of Compliance**.



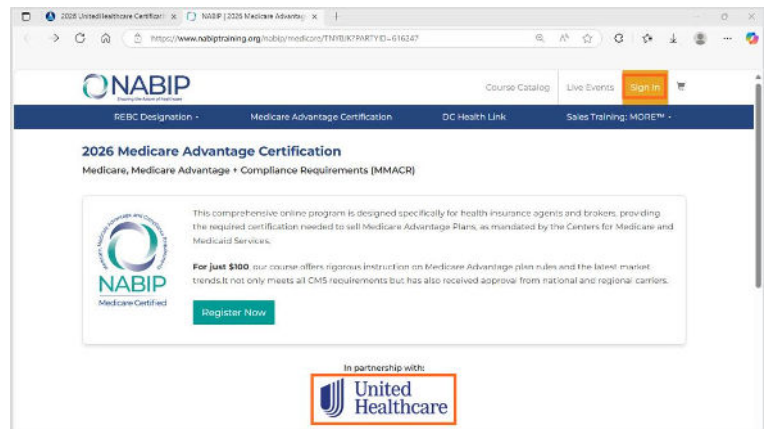
Click on the **2026 NABIP** module.



Click on **Click here to launch NABIP**.

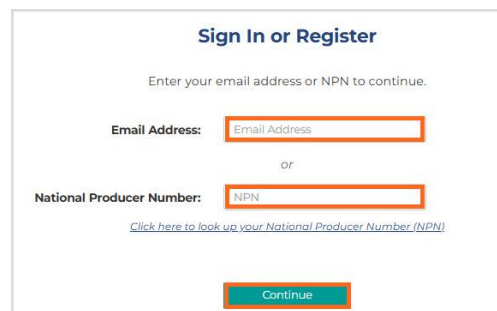


A new tab will open on the NABIP website displaying the UnitedHealthcare logo. Click the **Sign In** button appearing in the upper right corner.



On the **Sign In** page, you can enter your login credentials.

If you require assistance with your login credentials, please email support@nabiptraining.org or call the NABIP Student Services Helpdesk at 844-257-0990 (Option 6).



To purchase NABIP training, click on the **Register Now** button.

2026 Medicare Advantage Certification
Medicare, Medicare Advantage + Compliance Requirements (MMACR)

This comprehensive online program is designed specifically for health insurance agents and brokers, providing the required certification needed to sell Medicare Advantage Plans, as mandated by the Centers for Medicare and Medicaid Services.

For just **\$100**, our course offers rigorous instruction on Medicare Advantage plan rules and the latest market trends. It not only meets all CMS requirements but has also received approval from national and regional carriers.

Register Now

In partnership with:
United Healthcare

Click the **Add to Cart** button.

NABIP Certified
Medicare, Medicare Advantage and Compliance Requirements (MMACR)

Add to Cart
\$100.00

The purpose of the three part course is to provide a quality certification that meets CMS requirements while reducing the time commitment of veteran agents who are already well versed in the MA and Part D market. This training is at an affordable price, with an optimum number of continuing education credits awarded. NABIP's Benefits Specialist Institute provides a comprehensive online program that gives an agent the background to make informed decisions on Medicare, including plan options, marketing, and enrollment requirements.

Learning Objectives:

- All CMS requirements for Medicare Certification
- Most Common Compliance Issues Facing Plan Sponsors and Agents
- Changes in CMS Guidelines
- Trends in the Marketplace
- Medicare Supplement

Follow the prompts to Add or Decline insurance continuing education (CE).

Insurance CE

You must now **Add** or **Decline** insurance continuing education (CE).

- There is no additional cost for this credit to be applied.
- Some states may require a proctored exam if insurance CE is selected.
- You must be a licensed insurance producer to add this credit type.

To **Add** credit, choose your state from the dropdown menu and then click the green Add button.

*If your state is not listed in the dropdown then it is **not** currently approved for Insurance CE. If you would like Insurance CE then please contact our office at support@nahiptraining.org to find out the status of CE in your state. CE cannot be granted in states that are not approved and cannot be added after the fact so you must elect your credit now prior to completing the course.*

To **Decline** credit, click the red Decline button.

After you have made your selection for insurance CE, click on the **Continue with these Credit Choices** button which will add the course to your cart.

2025 Medicare, Medicare Advantage + Compliance Requirements (MMACR)

Completion of this course can earn you multiple types of credit towards licenses you hold. Please tell us which credits you wish to receive.

For each credit option below you must click either the green or red button to add or decline that credit. Upon completion of your course you will receive all of the credits that you select here, but any declined credits will NOT be earned.

Added to Cart	NABIP Education	\$100.00
	For credit, course must be completed by: 06/30/2025	
Declined	Insurance Continuing Education	
Click To Add	Do I Need This Credit? Are you a licensed insurance producer? If you would like your course credit reported to your state and posted to your insurance license transcript then you must select this credit type. click to learn more.	

Continue With These Credit Choices

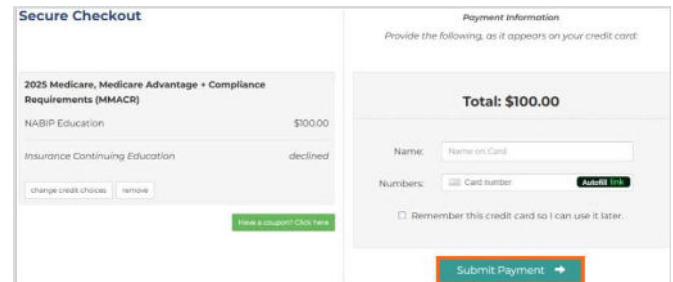
You may now continue to browse the training catalog or complete the checkout process.



To finish your purchase, click the **Proceed to Checkout** button.



You are now on a secure checkout screen. Enter your name and credit card information in the boxes on the right side of the screen and click the **Submit Payment** button.

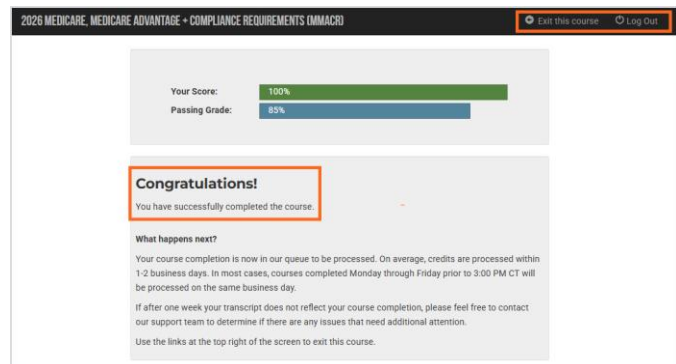


Your course has now been purchased. After a successful transaction, you will be shown a summary screen of your purchase and confirmation email will be sent to you. From here you can launch the course by clicking on the **Launch Course** button.



If you require assistance with your purchase transaction, please email support@nabiptraining.org or call the NABIP Student Services Helpdesk at 844-257-0990 (Option 6).

Upon successfully completing the final exam the results will automatically be sent 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 2026 NABIP will appear completed upon successful transmission.



A green checkmark will indicate that your NABIP score was transferred to UnitedHealthcare.

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**.

The screenshot shows a list of certification requirements. The first item, '2026 NABIP', is marked with a green checkmark and highlighted with a red box. Below it are '2026 Ethics and Compliance Assessment' and '2026 AARP Assessment', both with yellow highlights. A note states 'The modules in this course must be completed in the order listed.' The next section is 'REQUIRED TO SELL D-SNP or C-SNP' with a red box, followed by '2026 Next Level: Dual Eligible and Chronic Condition Special Needs Plans'. Another note about module order is present. The final section is 'REQUIRED TO CONDUCT EVENTS' with a red box, followed by '2026 Next Level: Events Basics'. A final note about module order is at the bottom.



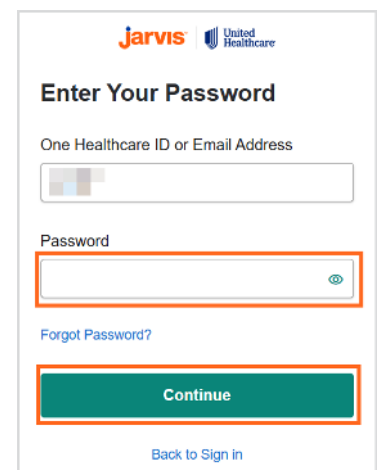
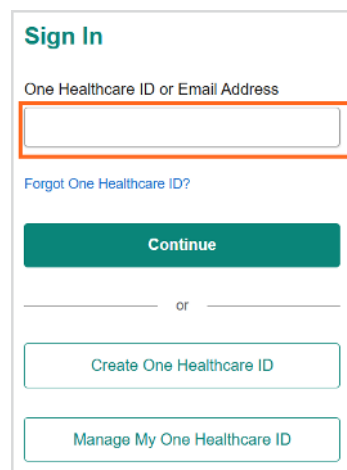
Logging into Jarvis


Accessing Jarvis – Registered Users

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




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







Need Help?

Contact the Producer Help Desk (PHD)
Monday - Friday 7am - 9pm CST

 **PHD Chat**

 **English 888-381-8581**

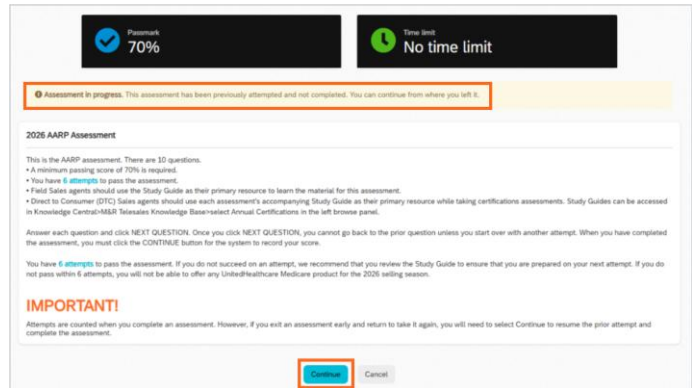
 **Español Preslone la opción 2**



Attempts, Results and Progress

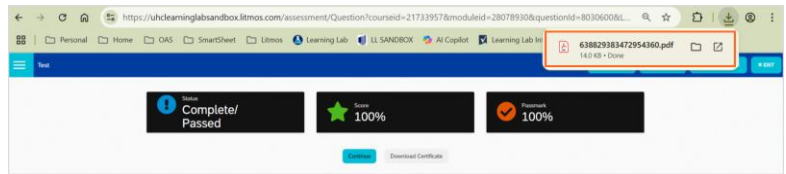
ATTEMPTS

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.

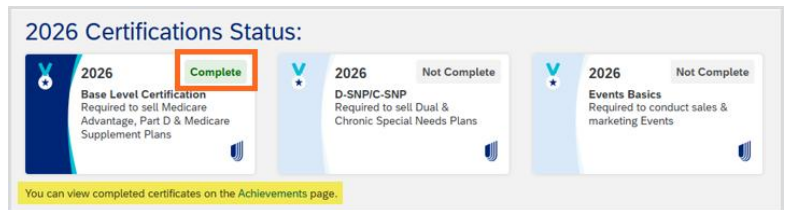


RESULTS AND ACHIEVEMENTS

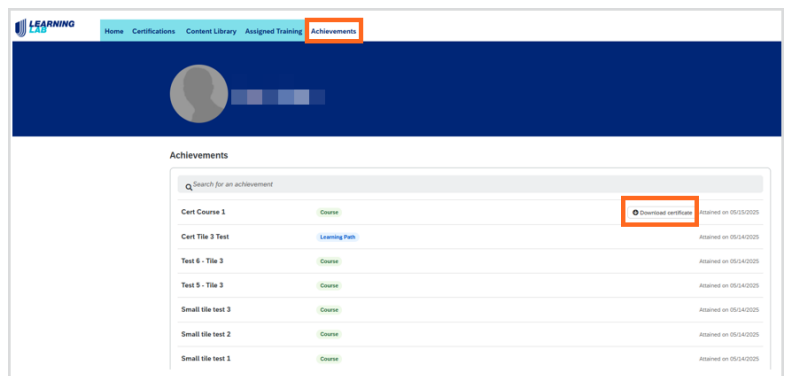
When you complete an assessment (either pass or fail), you will see the results. You will also be able to download a certificate of completion if the assessment completed the certification path.



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.

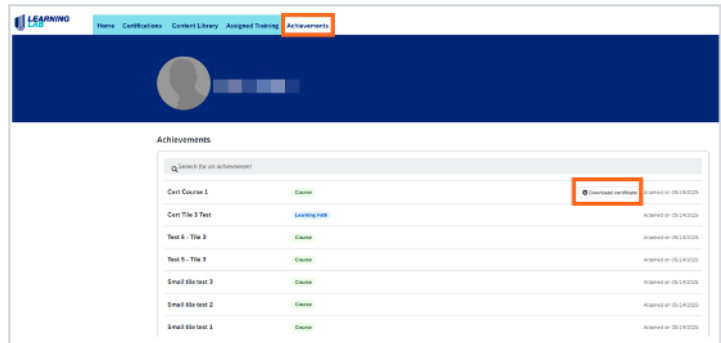


Achievements and Printing Certificates

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.

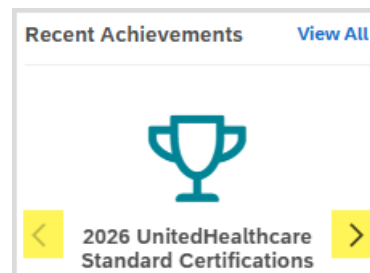


- A PDF of the certificate will appear. Open the PDF and print the certificate.



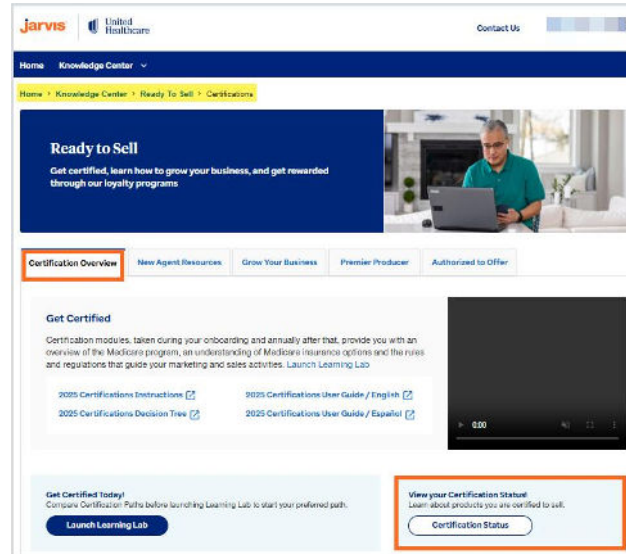
For a quick view of your most recent achievements:

- 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



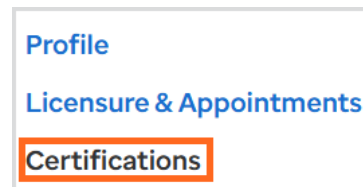
From any page in Jarvis, click on your **name** on the top menu bar.



- Click on Manage Profile.



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



- A list of your current certifications will appear.

Current Certifications		
Year	Certificate Name	Completion Date

Note: If you took 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

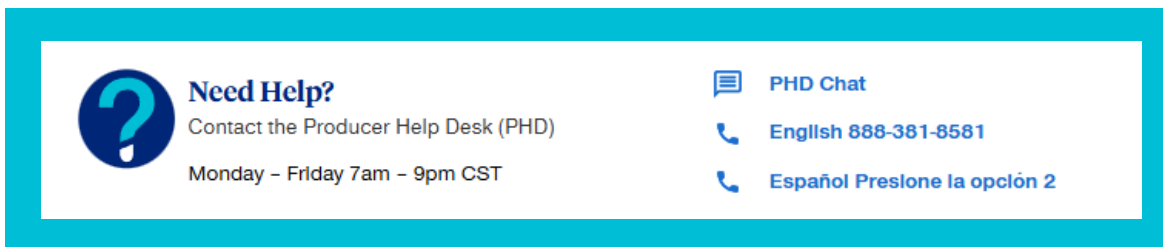
- Web browser:
 - Microsoft Edge
 - Google Chrome
 - Mozilla Firefox
 - Apple Safari
- JavaScript and cookies enabled

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.

