How to do Business – United Healthcare

Agent Contracting:

Please contact igsmcontracts@igroupweb.com for information on contracting. This step requires the up line agent to make the request for a link to be sent. **Website:** www.unitedhealthproducers.com allows you to:

- Manage Your Account
- View Product Information & Materials
- Access Service Forms
- View Commission Status
- Submit enrollment applications electronically

Sales Support

www.unitedhealthproducers.com or www.unitedhealthadvisors.com

New Business:

Call for status, underwriting, customer service and claims at 888-381-

8581 Fax app submission at 888-836-3985 or 888-202-4340

Mailing Address:	Overnight Address:
United Healthcare Insurance	United Healthcare Insurance Company
Company	Enrollment Division
PO BOX 105331	4868 GA Hwy 85
Atlanta, GA 30348	Suite 100
	Forest Park, GA 30297

Web Upload: www.unitedhealthproducers.com

If you have any questions or need assistance with the submission process, please feel free to call the Agent Contact Center at 888-381-8581.







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Technical Requirements

2019 Annual Certification Requirements

To solicit, present or sell any products in the UnitedHealthcare Medicare Solutions portfolio (may include plans branded UnitedHealthcare, AARP, Medica HealthCare Plans, or Preferred Care Partners), 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 complete all the prerequisite tests and the individual product test(s) for the product(s) you wish to sell.

NOTE: While you may proceed directly to each test without completing the related module (except for AARP Course), it is strongly recommended that you review the module before attempting the test.



A summary of the steps to certify is as follows:

2 Complete the PRODUCT TEST(s) by Complete all PREREQUISITE TESTS by passing with a score of 85% or higher within passing with a score of 85% or higher within 6 attempts or you will not be allowed to sell 6 attempts. the applicable product for the plan year. • Failing any prerequisite test will block access Available product tests by type are: to any test and you will not be able to market or sell any UnitedHealthcare Medicare AARP[®] Medicare Supplement Insurance Solutions product for the plan year. Plans • Prerequisite tests must be taken in order: **Chronic Condition and Dual Special** Needs Plans (CSNP/DSNP) 1) Medicare Basics* Institutional and Institutional-Equivalent 2) Ethics and Compliance Special Needs Plans (ISNP/IESNP)** AARP Course Senior Care Options**

> * Medicare Basics includes credit for Medicare Advantage and Prescription Drug Plans. ** Available by invitation only

AHIP Certification for our EDC Partners

America's Health Insurance Plan (AHIP) Certification satisfies the requirement for the following UnitedHealthcare Medicare Solutions Certification Modules: Medicare Basics, Medicare Advantage Plans and Medicare Prescription Drug Plans. If you choose to certify via AHIP, you need to transmit the 2019 AHIP Certification before any other 2019 modules have been started. Failure to do so will result in AHIP score rejection. (See page 5 for instructions.)



6.14.18 User Guide

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This applies to EDC producers only and does not include Telesales and ICA producers.

AHIP Certification is not required. If you elect to do this, you will receive a \$50 discount off of the first AHIP purchase. You must <u>first</u> enter the site by going through the <u>www.uhcjarvis.com</u> Knowledge Center to access the AHIP link found on the certification page, which takes you to the co-branded site. Please note that once you select the 2019 AHIP link you will be unable to access the 2019 Medicare Basis Test. Conversely, if you initially begin the 2019 Medicare Basics Test, you will be unable to access the 2019 AHIP link.

AHIP Certification satisfies the requirement for the following UnitedHealthcare Medicare Solutions Certification: 2019 Medicare Basics Test (including Medicare Advantage and Part D). If you choose the AHIP option, you will also be required to complete the following prerequisites: 2019 Ethics and Compliance and 2019 AARP Course. UnitedHealthcare will accept your AHIP certification and display any other required tests. As with other requirements, you have six attempts to pass the assessments at 90% (UHG only recognizes the first two purchases).

<u>Note</u>: If you choose to certify via AHIP, you need to complete the 2019 AHIP Certification <u>before</u> any other 2019 Certification tests. Failure to do so will result in AHIP score rejection.

To begin 2019 UnitedHealthcare Medicare & Retirement certification using AHIP, complete the following steps:

- 1. Log into Jarvis (www.uhcjarvis.com)
- 2. Click Knowledge Center
- 3. Click on Certification (Left-hand navigation menu)
- 4. Click 2019 AHIP (EDC Only)
- 5. Select **OK** for the pop-up messages
- 6. Click Launch
- 7. Sign on with your AHIP username and password OR register if you are a new AHIP user
- 8. Select Medicare Course Home
- 9. Complete the assigned modules
 - Returning AHIP users will be assigned the recertification modules
 - New AHIP users will be assigned the full certification modules
- 10. Pass the test in 6 or fewer attempts with a score of 90% or higher
- 11. At the end of the test, go to the home page Click Transmit to United Healthcare
- 12. Select I Comply when the Pledge of Compliance Screen appears
- 13. Once the "Congratulations" screen appears, return to the certification page

Next, you *must* pass the following tests:

- 2019 Ethics and Compliance
- 2019 AARP[®] Course

REMINDER: For agents who choose to complete 2019 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 on your development plan. Again, this must be completed before access to any other 2019 tests. However, agents choosing to certify directly from the AHIP website or through another carrier will forfeit the UHC discount.

Logging In

Registered Users

- Go to www.uhcjarvis.com
- Enter your Agent or Party ID and password
- Click on Sign-In



Accessing Modules, Tests and Certificates



Welcome Page

The opening page of the Learning Center is the Welcome Screen. This page provides details about the annual certification.

We are pleased that you have chosen to become certified to sell our products. Our certification courses will educate you on Medicare, Compliance and Medicare health plans, giving you a strong foundation for making sales presentations, conducting meetings and helping Medicare-eligible consumers make the right choices.

Thank you for your business and good luck with your 2018 Certification!

Technical Requirements

*Modules and tests are not compatible with mobile technology such as smart phones. iPads or tablets.

- In order to take any of the certification modules and/or test, please make sure your computer meets the following require

 - Make sure that you have a reliable internet connection; a wired connection is optimal
 Do not open more than one browser window at a time
 Turn off all pop-up blockers
 Depending on your browser choice, you may need to turn on compatibility view. Do this by clicking Tools, then selecting Compatibility View. Make sure "<u>unitedhealthgroup.com</u>" is added to the Compatibility View Settings popup box
 If using IE, confirm you are using Internet Explorer 8 or higher
 Acrobat Reader version 8 or higher
 Macromedia Flash Player 9 or higher

If you have trouble launching a module, contact the Producer Help Desk (PHD): 888-381-8581 (Monday-Friday, 7 a.m. – 8 p.m., CST).

Certification Instructions

To solicit, present or sell any products in the UnitedHealthcare Medicare Solutions portfolio¹, 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 complete all the required prerequisite modules and the individual product module(s) for the product(s) you wish to sell.

PLEASE NOTE: While you may proceed directly to each test without completing the related course module, it is strongly recommended that you review the course module before attempting the test. Please remember that you must pass the test with a score of 85% within six attempts.

A summary of the steps to certify is as follows:

You must complete, in order, the following prerequisite tests (course modules are optional) and pass the corresponding assessment with a score of 85% or higher within six attempts.

2018 Medicare Basics (including Medicare Advantage and Prescription Drug Plans)
 2018 Ethics and Compliance
 2018 AARP Course

You must complete the product test(s) (course modules are optional) with a score of 85% or higher within six attempts, or you are not allowed to sell the applicable product for the applicable plan year. Available product modules by type are:

- 2018 AARP Medicare Supplement Plans
 2018 Chronic Condition and Dual Special Needs Plans
 2018 Institutional and Institutional-Equivalent Special Needs Plans (ISNP)²
 Cartiar Continued Special Needs Plans (ISNP)²
- Senior Care Options²

Note: Failure to meet the minimum requirement of 85% within six attempts on a prerequisite test, you will not be allowed to sell any UnitedHealthcare Medicare Solutions products for the applicable plan year.

³May include branded UnitedHealthcare, AARP, Care Improvement Plus, Medica HealthCare Plans, Preferred Care Partners, or Sierra. ² Available by invitation only

Navigation Panel

The Welcome Page provides several navigation choices, located on the left side of the screen.

– Welcome!

- Certifications
- Electives
- Invitation-Only
- Evaluations

Certification Modules/Tests

In the Navigation Panel, click on Certifications to view your modules and certifications by year.

- Each topic has two items listed: module and test.
 Review the module (optional) and then take the test (required).
- Prerequisite tests must be taken first and in order.
- Product tests should be completed after the prerequisite modules.
- The status and date completed are provided on this screen.
- Once you are certified to sell a product, you will see a gold medallion next to the date completed column.

19	2018	2017	2016	2015	2014	2013	2012	2011	201	0	
19 AH	IP (EDC On	ly)						c	tatua	Data	
019 AH	IP (EDC Only)						3	=	Completed	
H	f you do N Aj	OT want gents cho	to certify posing to	via AHIP certify vi	, please j a AHIP m	proceed to ust click l	o the Prem ink above	equisites FIRST!	s belov		
19 Pre	requisites	(including	Medicare /	Advantage	and Presci	ription Drug	g Plans)		4-4	Dete	
010 Mo	diagra Dagiag	(including)	fodiaaro Adu	antono and I	Dropperintion (3	tatus	Completed	
019 Me	disoro Dosios	Toot (including in	ling Modisory	Adventere	and Droparin	tion Drug Plans)	20)		-		
019 1010	uicale Dasics	liance	ing weucare	Auvantage	anu Frescrip	uon Drug Fla	115)		-		
2019 Eul	ics and Com	pliance Test							-		
2013 Lui		pliance rest							-		
									-		
019 AA	RP Medica	re Supplen	nent Plans	Certificatio	on						
								S	tatus	Date Completed	
2019 AA	RP Medicare	Supplement	Plans						-		
2019 AA	RP Medicare	Supplement	Plans Test						-		
019 Ch	ronic Cond	ition and E	ual Specia	I Needs Pl	ans Certific	cation					
								S	tatus	Date Completed	
2019 Chi	ronic Conditio	n and Dual	Special Need	is Plans (CS	NP-DSNP)				-		
	ronic Conditio	n and Dual	Special Need	is Plans (CS	NP-DSNP) T	est			22		

Certification Tests – Telesales Only

Telesales agents should work with their instructor/leader to ensure completion of the correct courses.

TELESALES PRODUCERS ONLY - 2019 Telesales Fundamentals (PSA, PDP EE, Group, C&	Status	Date
2019 Medicare Basics Assessment - TS	_	Completed
2019 Ethics and Compliance Assessment - TS	-	
2019 AARP Course - TS	-	
TELESALES PRODUCERS ONLY - 2019 Medicare Advantage (PSA, Group)		
	Status	Date
2019 Medicare Advantage Assessment - TS	-	Completed
TELESALES PRODUCERS ONLY 2019 Part D (PSA, PDP EE, Group, C&S)		
	Status	Date
2019 Medicare Part D Assessment - TS	-	Completed
TELESALES PRODUCERS ONLY - 2019 Special Needs Plans (PSA & Group Existing)		
	Status	Date Completed
2019 Chronic Condition and Dual Special Needs Plans Assessment - TS	-	
TELESALES PRODUCERS ONLY - 2019 AARP Medicare Supplement (Group)		
······································	Status	Date
2019 AARP Medicare Supplement Plans Assessment - TS	-	Completed
TELESALES PRODUCERS ONLY - 2019 Events Basics	Status	Date
2019 Events Basics Assessment - TS	otatua	Completed
2019 Eventa buaica maacaament - 10	-	

Elective Modules/Tests

There are additional modules available for your further education and/or other requirements. They are listed in the Electives section.

	Status Date Completed	
2019 Events Basics		
2019 Events Basics Test	-	

Note: The Events Basics course and test are required for agents that want to conduct any type of event (Educational or Marketing/Sales) for the plan year prior to reporting the event to UnitedHealthcare.

Invitation Only Modules/Tests

On occasion, you may be required to take a module and test that is not available to everyone. If you are assigned a specific module and test, it will be listed in the **Invitation Only** section and must be completed.

Invitation-Only Online Courses						
Plan and Product Knowledge Issues v4	Status	Date Completed				
Plan and Product Knowledge Issues Test v4	-					
Point-of-Sale and Post-Sales Issues v4	-					
Point-of-Sale and Post-Sales Issues Test v4	-					
Risks to Consumers and/or Organization v4	-					
Risks to Consumers and/or Organization Test v4	-					
Prohibited Activities v4	-					
Prohibited Activities Test v4	-					

Certificates

Upon successful completion of a test, a gold medallion will appear on your development plan indicating you are certified to sell the particular product.

Open the certificate as needed

by clicking on the ^{even} icon. Each certificate includes the product name, agent name and party ID, and date of certification. To **print** a copy of the product certificate, follow the instructions below.



Printing				
To print a copy of your certificate, click on the ^{Pont} icon.	2019 AARP Medicare Supplement Plans Certification 2019 AARP Medicare Supplement Plans 2019 AARP Medicare Supplement Plans Test	Status V	Date Completed 05/15/2018 05/15/2018	→ Print 05/15/2018
			-	_

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



Modules are not compatible with mobile technology such as smart phones, iPads or tablets.

In order to take any of the certification modules and/or tests, please make sure your computer meets the following requirements:

- Make sure that you have a reliable internet connection; a wired connection is optimal
- Do not open more than one browser window at a time
- Turn off all pop-up blockers
- Depending on your browser choice, you may need to turn on compatibility view. Do this by clicking Tools, then selecting Compatibility View. Make sure "<u>unitedhealthgroup.com</u>" is added to the Compatibility View Settings popup box
- If using IE, confirm you are using Internet Explorer 10 or higher
- Screen resolution of 1024 x 768
- Acrobat Reader version 6 or higher
- Macromedia Flash Player 9 or higher

If you have trouble launching a module or test, contact the Producer Help Desk (PHD):

888-381-8581

(Monday - Friday, 7 a.m. to 9 p.m., CT)

5. Enter a "Search Type" – You can search by "Applicant Name and State"; "Applicant Identification Numbers" or pull up all enrollments in a given state by selecting "Search by Applicant State."

Home Page M suggested sites •	Web Slice Gallery 👻	😭 Home 💌 🔯 Feeds ()) 💌 🖃 Read m	Jail I∰I Print ▼ Page ▼ Safety ▼ Too
Applicant Search	My Recent Activity		
Enter one or more search criter	a below, then select Search to see a list of applications	and enrollments that match your criteria.	
Required			
Agent ID:"	Application Received 0 Start Date: 08/14/2013	End Date 10/14/2013	
Choose a Search type (Clic	k the radio buttons to see criteria for each search type)		
Search by Applicant Name Applicant First Name*	e and State/US Territory	Applicant State# IS Territory *	
		WEST VIRGINIA	~
Search by Applicant Ident	ification Numbers		12.779.88.777.87.87.87.87.87.8
Search by Applicant State			
Clear X			Search

This will pull up a list of your enrollments based on your search specifications. The search will show the following:

Applicant Name	D.O.B.	Medicare #	AARP Member #	State	App Rcvd	Eff Dt 🕜	Product	Status 🕜	Reason

Make sure you pay special attention to the following categories:

- Effective Date Make sure this matches what was on the original enrollment
- Product Make sure this matches the desired plan selection
- <u>Status</u> You want to make sure everything shows as Enrolled:

• Accepted (Enrollment Received and In Process)



• Enrolled (Enrollment Processed; Member Enrolled)

• Denied (Enrollment Denied)*

*If the enrollment was Denied, there will be a Reason Code in the last column (i.e. Duplicate Application)

You can also click on each name for additional information.

UnitedHealthcare® Agent Toolkit

WHAT IS THE AGENT TOOLKIT?

The UnitedHealthcare Agent Toolkit allows you to create customized marketing materials with targeted messages quickly and easily while ensuring compliance with regulatory, CMS and branding standards.

ACCESSING THE AGENT TOOLKIT

- 1. Type www.unitedhealthproducers.com in your internet browser if you are an EDC agent. If you are an ICA or ISR, type www.unitedhealthadvisors.com.
- 2. Enter your username and password in the lower right corner and click "GO".



3. Click on the "Product Information and Materials" tab.



4. You can access the Agent Toolkit by clicking the link on the left or the Agent Toolkit tab.



Quick Start Guide

FINDING MATERIALS

Note: Materials are subject to location change through the year.

1. Shown below is the Agent Toolkit home page. Start by clicking on either the English or Other Languages tab.



- a. In the Product Specific Marketing section, you will find the materials available by product.
- In the Comprehensive Marketing Programs, you will find materials for community meetings, member materials, educational materials, retail materials and much more.



CREATING AND ORDERING MATERIALS

- 1. Click into a folder and you will find many options.
- UnitedHealthcare



* Manage

2. Select the material you want to order.



3. Once you select a material, you will be taken to an editing screen where you can customize the piece based on defined criteria.



4. Click "PDF Preview" to see how it will look before you order.

5.



NEXT STEP

 There are two options for receiving materials, Download or Order Printed Items. Select Download if you want a PDF to print on your own computer. Select Order Printed Items if you want your order professionally printed and shipped. There may be a charge for this option. Then, click NEXT STEP.



7. Click ADD TO CART

bit is a constrained with the set of the set o

8. When in the Shopping Cart tab, you have the option to edit your order, do another PDF preview or you can click **Proceed to Checkout.**



9. Click Place Order

UnitedHealthcare



 Select Order Printed Items if you want your order professionally printed and shipped. Select the quantity from the drop down box. It will list if there is a cost to have them printed. Shipping is extra. Click NEXT STEP.

(Note: There is never a cost if you select download.)



2. Click ADD TO CART



3. You will see the product and price in your shopping cart.



4. Confirm your shipping information. If the address is incorrect, you need to change it on the profile tab. Check the "I have verified" box and then click **NEXT STEP**.

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5. Enter payment information. Total price is shown on this page.

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VIEWING ORDERS

1. Click on **My Past Orders** tab to view your order or to download your PDF by clicking on the hyperlink

Uni	tedHe	althca	re					Favo
Home	English Ma	aterial Of	ther Languages	Shopping Cart	My Past Orders	My Profile	Resources	Logou
1y Past	Orders	t order submiss	sions can be found h	ere. Click on "Details	" next to your order to a	ccess the file down	oad links.	
/iew: All	Orders	Created	Items			Total	Status	Options
G-OVATION	45-98E9D88E	11/30/201 11:19 AM	s Esta	2 x 11 AARP Camp efits 2 x 11 AARP Camp efits	baign One Flyer with	\$0.00	D In Process	Details

DOWNLOADING YOUR MATERIALS

 Select **Download** if you want to print the item. Not all materials are available for download. Then click **NEXT STEP**.

(Remember: There is never a cost when you select download.)



3. You will see the product in your shopping cart. The quantity will be 1 and the price will be \$0.00. Click **Proceed to Checkout**.

	Ithcare [®]	Go to	Favorite Materials		~	📌 Manage Favorites
Home English Mate	rial Other Languages	Shopping Cart My Pas	t Orders My Pi	rofile R	esources	Logout
Shopping Cart	ceed to Checkout' to order the c	ontents of your shopping cart				
Your orde to finalize removed If you do	er is not complete until you e your order. You must finis from your marketing mate o not finalize your order, i	finish the checkout proces h the checkout process to rial. it will not be processed.	s.Click "Proceed have the waterm	d To Chec ark "PROC	kout" DF" Proceed to Ci	neckout
Item	Description	Product	Date Modified	Quantity	Options	Price
D-OVATIONS-A94550EB	8 1/2 x 11 AARP Campaign Two Flyer with Benefits	8 1/2 x 11 AARP Campaign Two Flyer with Benefits	3/28/2016 4:03 PM	1	Edit PDF Preview Duplicate Delete Hold	\$0.00
Empty Cart			Continue Shopp	bing	Subto	al: \$0.00

4. The checkout screen will appear. Click, PLACE ORDER.

UnitedHealthcare

Checkout Steps	Checkout 👸 Order: Review and place your order for production									
	Please note: Toolkit charge credit card statement as co	Please note: Toolic charges will be identified on your credit card statement as coming from Brandspring Solutions who manages the toolkit and transactions.								
	Place Order Cano									
	Item	Description	Product	Date Modified	Quantity	Price				
	D-OVATIONS-F538A0	8 1/2 x 11 AARP Campaign One Flyer with benefits	8 1/2 x 11 AARP Campaign One Flyer with benefits	11/10/2015 11:26 AM	1	\$0.00				
				S	ubtotal hipping	\$0.0				
				т	otal Price	\$0.00				

5. You will be taken to the My Past Orders tab where you can download your PDF <u>immediately</u> by clicking on the hyperlink. Even though the status says "In process" the item is completed and ready for use. The material will now have the "Proof" watermark removed from it.

	althcare				🚖 Hanaq Pavori
Home English Ma	aterial Other L	anguages Shopping Cart My P	ast Orders My Profile	Resources	Lopout
My Past Orders	order submissions c	in be found here. Click on "Details" next to	your order to access the file downle	oad links.	
View: All Orders	•		****		
Order	Created	Items	Price	Status	Options
G-OVATIONS-9859D885	11/30/2015 11:19 AM	 § 5.1/2 × 11 AARP Campaign One benefits § 1/2 × 11 AARP campaign Inv Benefits 	\$0.00 \$0.00	D In Process	Details

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