

I want to sell or conduct:

I must pass these assessments:

Base Level

Medicare Advantage Plans non-SNP (MA non-SNP)

UnitedHealthcare, AARP, Erickson, Peoples Health, Preferred Care Partners, Preferred Care Networks, or Rocky Mountain Healthcare branded HMO, POS, PPO and PFFS plans

AARP Prescription Drug Plans (PDP)

AARP Medicare Supplement Plans

Successfully pass all 3 Base Level assessments:

- Medicare Basics* (or transfer AHIP or NABIP passing score)
- Ethics & Compliance
- AARP

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

Next Level

Dual Special Needs Plans and/or Chronic Condition (D-SNP/C-SNP)

UnitedHealthcare, Preferred Care Networks, Preferred Care Partners, and Erickson

Events Basics

To conduct marketing/sales events, host a retail kiosk, or conduct a community meeting

Institutional and Institutional-Equivalent Special Needs Plans (I-SNP/IE-SNP)

Senior Care Options UnitedHealthcare

Successfully pass all Base Level assessments **AND** Dual and Chronic Condition Special Needs Plans (D-SNP/C-SNP) assessment

Successfully pass all Base Level assessments **AND** the Events Basics assessment

Successfully pass all Base Level assessments **AND** Institutional and Institutional-Equivalent Special Needs Plans (I-SNP/IE-SNP) assessment (available by invitation only)

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

All agents must first agree to the Pledge of Compliance before taking any assessments.



2024 Certifications

What's New and Instructions

Important Changes in 2024

Conflict of Interest removed from Certification into a separate process

- You will no longer need to complete the Conflict of Interest disclosure or attestation as a part of Certification.
- The new Conflict of Interest process will begin July 1; you will be notified via email when you need to complete the disclosure and attestation. The email will arrive on the anniversary of your Party ID (PID) date.

Content Changes / CMS Ruling Changes

- **Scope of appointment changes** (*Study Guide section 3.4, Appointment Contact*):
 - Must be obtained no less than 48 hours before the start of the appointment, unless a 48-hour exception applies.
 - Must be obtained for all consumers, including current members.
 - **At educational events**, you are prohibited from collecting Scope of Appointments or setting up future marketing appointments.
- **Third party marketing organizations (TPMO) changes** (*Study Guide section 3.2, TPMO*):
 - Must record all marketing, sales, and enrollment calls, including the audio portion of calls via web-based technology and maintain those recordings for 10 years.
 - Required to use, where appropriate, a standardized disclaimer. Review Study Guide section 3.2 for details on the disclaimer wording.
- **Enrollment changes** (*Study Guide section 3.7, Enrollment Details*):
 - Provide the Pre-Enrollment Checklist (PECL) to the consumer with the enrollment form.
 - For telephonic enrollments, the contents of the PECL must be reviewed with the consumer prior to the completion of the enrollment.
- **Marketing/Sales Events** (*Study Guide section 5.5, Marketing/Sales Events*):
 - Must not conduct a marketing/sales event (formal or informal) within 12 hours of the completion of an educational event at the same location (i.e., same building or adjacent buildings).

Assessment and Study Guide Improvements

- Many questions rewritten for readability and removed some of the scenario-based questions.
- The Events Basics assessment is shorter! It is now 13 questions instead of 19.
- Feedback is now provided on assessments when you get a question wrong. It will direct you to the section of the study guide you should review.
- The Study Guide is located within the course as always, but it is now available on a tab on the home page for easy access all year.



2024 Certifications

What's New and Instructions

Follow the instructions below to help access the right courses and modules.
(All modules are also available in Spanish.)

1 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.

2 When the path opens in Learning Lab, you will find 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.

3 Complete all the **REQUIRED courses**: **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 will certify you to sell Medicare Advantage (non-SNP), Prescription Drug, and Medicare Supplement Plans.

4 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/sales events, complete the **Events Basics** assessment. If you have been invited to sell any other products, those assessments will appear on your Home Page.

i For more detailed instructions, review the **Certification User Guide** located on Jarvis>Knowledge Center or in Learning Lab>any Certification Path>Instructions course. You may also use the **Decision Tree** to help you understand which certifications are required.

* An attempt is counted when you complete the assessment or if you restart a previous attempt.



2024 Certification User Guide

Table of Contents

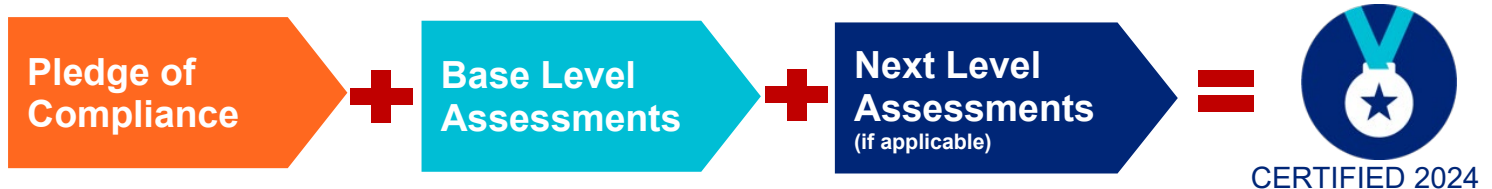
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2024 Annual Certification Requirements

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 all **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.
 - 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

Step 3: Complete all 3 REQUIRED Base Level Assessments

I want to sell or conduct:

I must pass these assessments:

Base Level

Medicare Advantage Plans non-SNP (MA non-SNP)

UnitedHealthcare, AARP, Erickson, Peoples Health, Preferred Care Networks, Preferred Care Partners, or Rocky Mountain Healthcare branded HMO, POS, PPO and PFFS plans

AARP Prescription Drug Plans (PDP)

AARP Medicare Supplement Plans

Successfully pass all 3 Base Level assessments:

- Medicare Basics* (or transfer AHIP or NABIP passing score)
- Ethics & Compliance
- AARP

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

Step 4: Complete any Next Level Assessments

I want to sell or conduct:

I must pass these assessments:

Next Level

Dual Special Needs Plans and/or Chronic Condition (D-SNP/C-SNP)

UnitedHealthcare, Preferred Care Networks, Preferred Care Partners, and Erickson

Events Basics

To conduct marketing/sales events, host a retail kiosk, or conduct a community meeting

Institutional and Institutional-Equivalent Special Needs Plans (I-SNP/IE-SNP)

Senior Care Options

UnitedHealthcare

Successfully pass all Base Level assessments **AND** Dual and Chronic Condition Special Needs Plans (D-SNP/C-SNP) assessment

Successfully pass all Base Level assessments **AND** the Events Basics assessment

Successfully pass all Base Level assessments **AND** Institutional and Institutional-Equivalent Special Needs Plans (I-SNP/IE-SNP) assessment (available by invitation only)

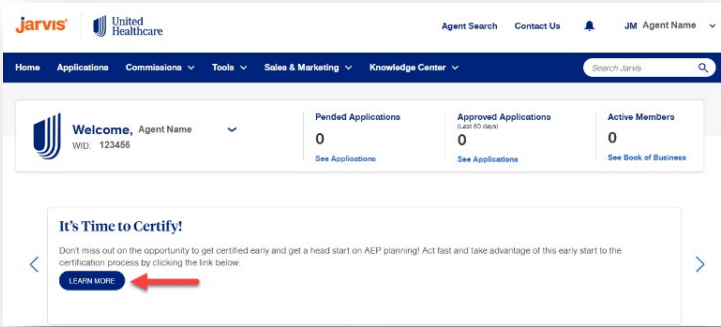
Successfully pass all Base Level assessments **AND** Senior Care Options assessment (available by invitation only)

Certification Instructions

1

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 UnitedHealthcare modules **OR** if you will be using a combination of AHIP or NABIP 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.

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

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 assessments)
- Base Level Courses: to sell MA (non-SNP), PDP and Medicare Supplement
- D-SNP/C-SNP Course: to sell D-SNP or C-SNP (must also complete all Base Level Courses)
- Events Basics: to conduct any marketing/sales events (must also complete all Base Level Courses)

Note: If you have been invited to sell I-SNP/IE-SNP or Senior Care Options, you will see these courses on your Home Page.

Haga clic aquí para ver la versión en español --> [Spanish](#)

AHIP Certification Path --> [AHIP Path](#)

NABIP Certification Path --> [NABIP Path](#)

RECOMMENDED: 2024 Certification Instructions

Optional

- 2024 Certification Instructions
- Certification Decision Tree
- 2024 Certification User Guide
- How To Certify (video 3:47)
- How To Certify (course)

0% My Score

STUDY GUIDE: 2024 Certification Content (to study for the assessments)

Optional

- 2024 Certification Content Study Guide

0% My Score

LEARNING LAB 2024 Fast Track Certification

Home Content Library Achievements Live Sessions **2024 Certification Study Guide**

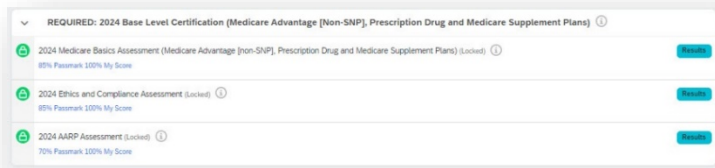
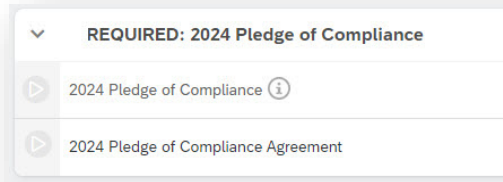
3 Complete all the REQUIRED courses:

- Pledge of Compliance and
- the 3 Base Level Assessments (Medicare Basics, Ethics & Compliance, and AARP).

Six attempts* are allowed on each assessment.

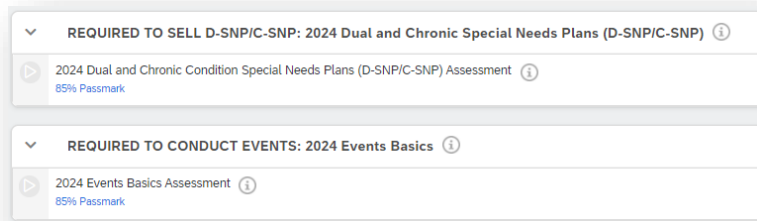
Completing the Pledge of Compliance and successfully passing all 3 base level assessments with 85% or higher passing score (70% for AARP) will certify you to sell Medicare Advantage (non-SNP), Prescription Drug, and Medicare Supplement Plans.

**An attempt is counted when you complete the assessment or if you restart a previous attempt.*

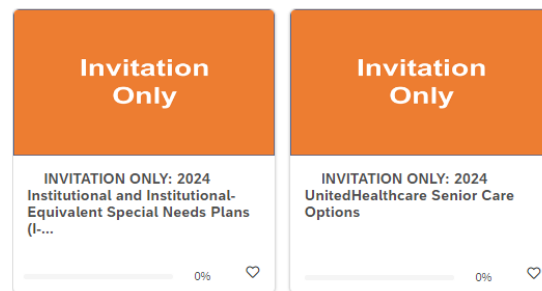


4 Complete any Next Level assessments if you wish to certify to sell more than the base level.

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.



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.

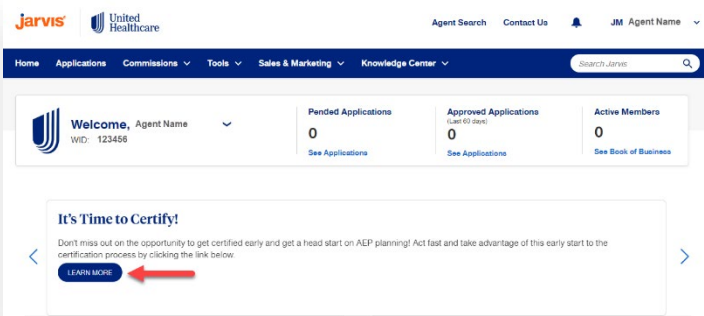


Enter your **One Healthcare ID** and **Password**.

Click on **Sign In**.



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.



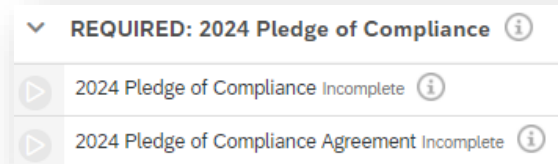
If you don't see the article, go to the [Knowledge Center](#) tab on the top bar. Then click on [Learning Lab](#). That will open Learning Lab and you can search for 2024 Certifications.



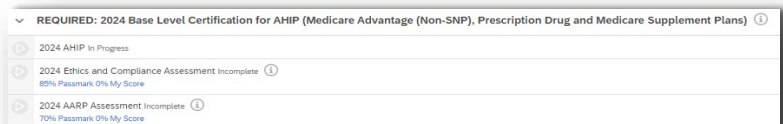
Then select the learning path you need to complete (only complete one path).



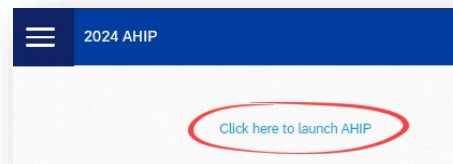
Complete the [Pledge of Compliance](#).



Click on the [2024 AHIP](#) module.

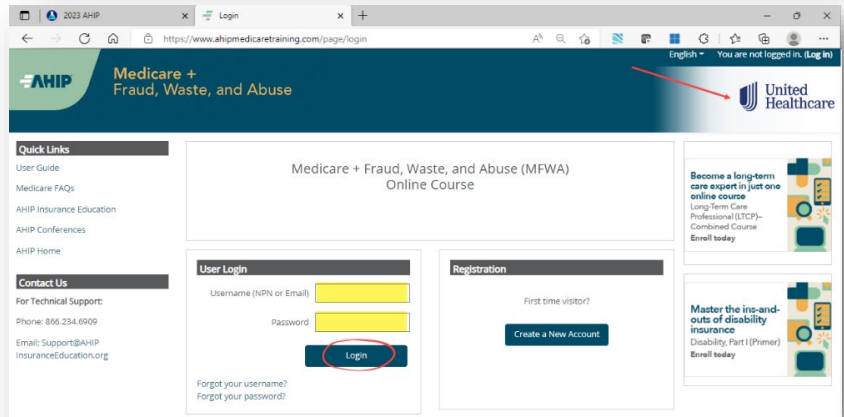


Click on the link [Click here to launch AHIP](#).

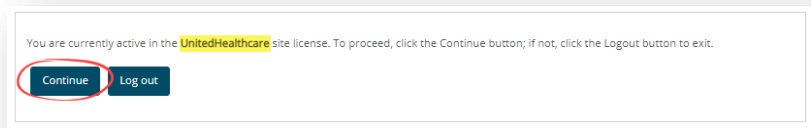


A new tab will open allowing you to log in with your **AHIP Username and Password** OR register if you are a new AHIP user.

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.



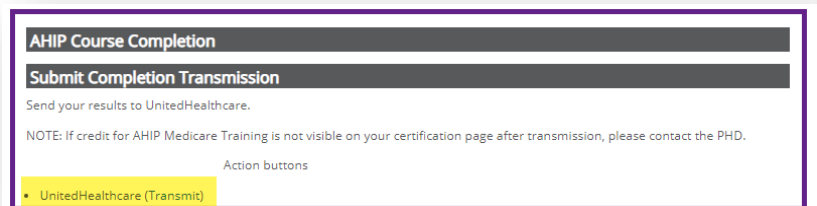
A pop-up message will appear to confirm you are active in the UnitedHealthcare site license, click **Continue**.



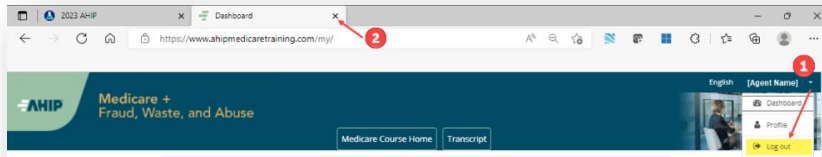
For assistance with the purchasing process, please refer to the **User Guide** located on the AHIP site.



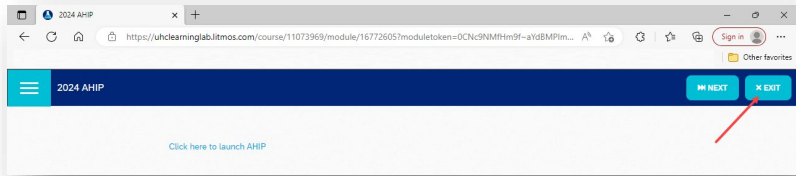
To send your results to UnitedHealthcare go to the **Medicare Course Home** tab, scroll to the bottom of the screen to click the **UnitedHealthcare (Transmit)** link.



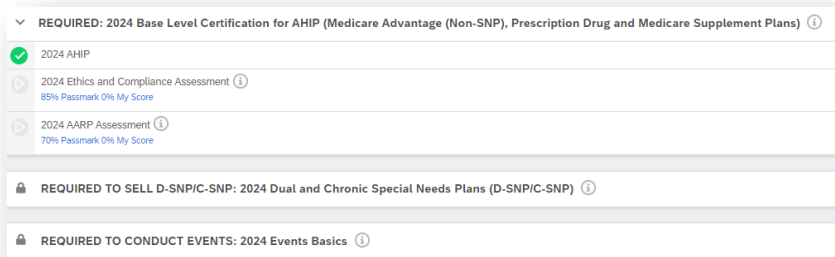
Log out of your AHIP account and close the AHIP tab.



On the Learning Lab tab, click the EXIT button to return to the main page where the 2024 AHIP will appear completed upon successful transmission.



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**.



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.)*

Go to www.uhcjarvis.com

Click on **Sign in with One Healthcare ID** button.

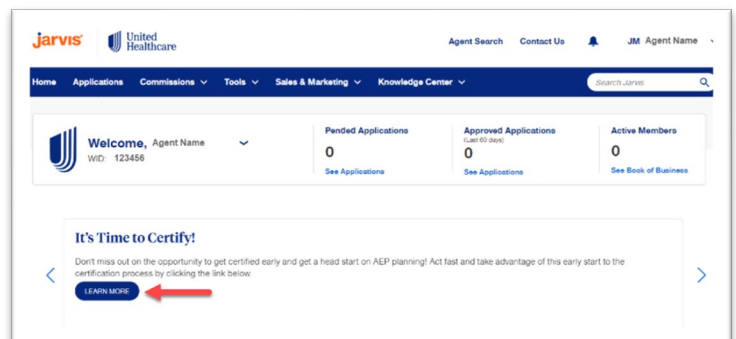


Enter your **One Healthcare ID** and **Password**.



Click on **Sign In**.

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.



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).



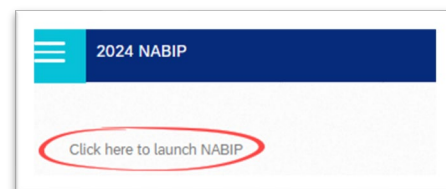
Complete the [Pledge of Compliance](#).



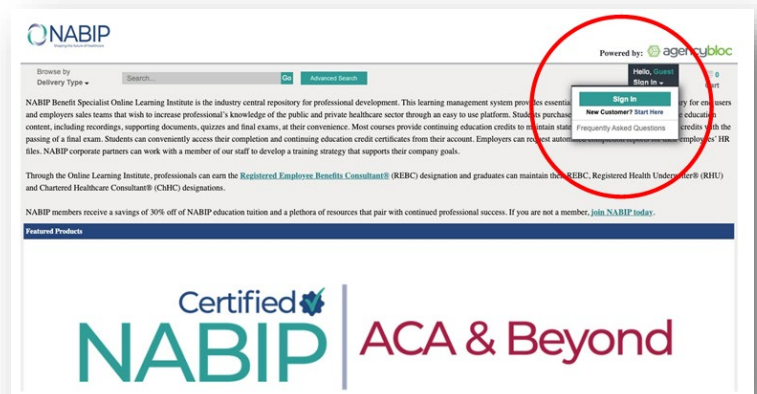
Click on the [2024 NABIP](#) module.



Click on the link [Click here to launch NABIP](#).

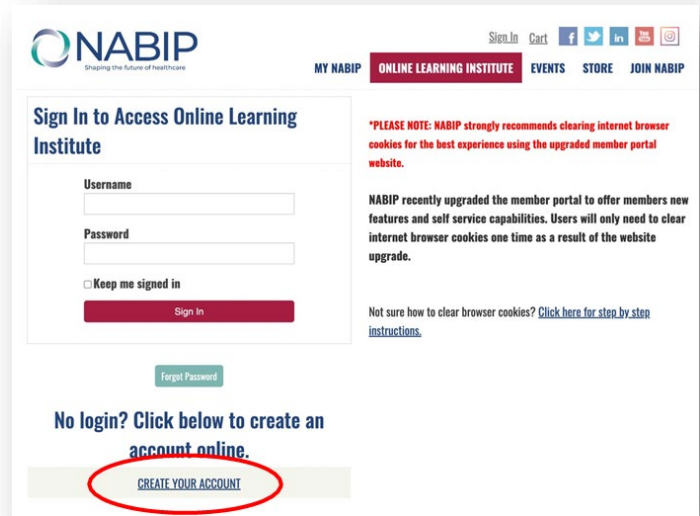


A new tab will open on the NABIP landing page. In the upper right corner, it will say "Hello, Guest." Place your cursor on the text for the [Sign In](#) drop down menu to appear.



On the [Sign In](#) page, you can enter your login credentials or create a new account.

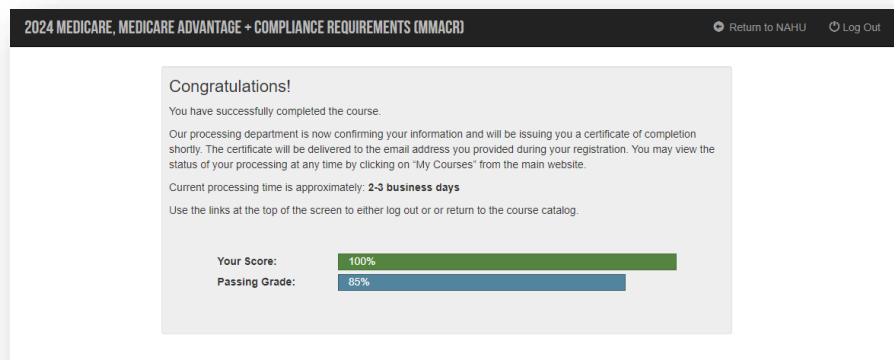
If you require assistance with your login credentials, please email professionaldevelopment@nabip.org or call the NABIP Student Services Helpdesk at 844-257-0990.



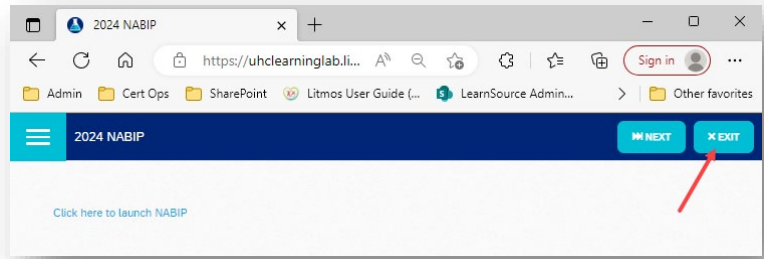
For assistance with the purchasing process, please refer to the [User Guide](#) located on the NABIP site.



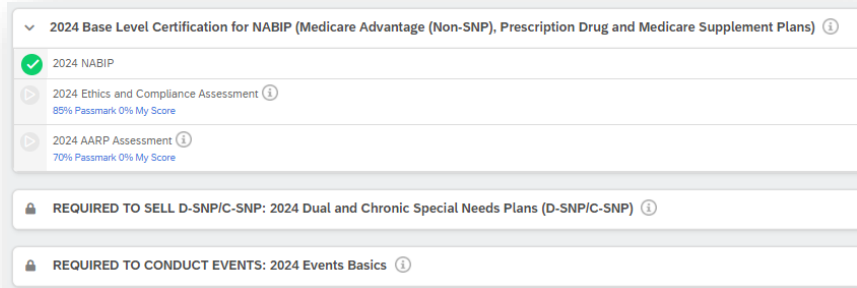
Upon successfully completing the final exam the results will automatically be send to UnitedHealthcare. [Log out](#) of your NABIP account and close the NABIP tab.



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.



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**.

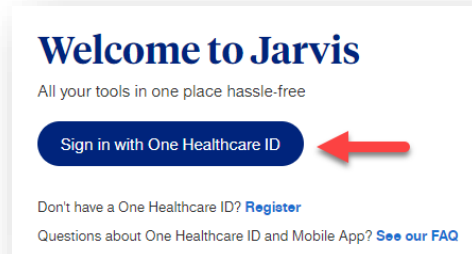


REMINDER: For agents choosing to complete the 2024 NABIP, either directly from the NABIP website or through another carrier, you are still required to follow the above directions in order to transmit your results to UnitedHealthcare and receive credit for the equivalents.

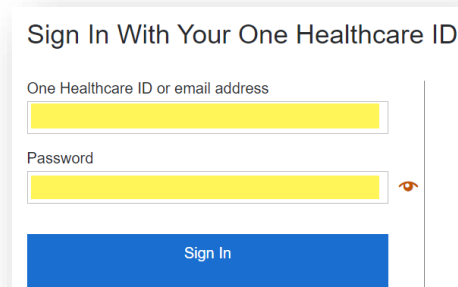
Logging into Jarvis

Registered Users

- Go to www.uhcjarvis.com
- Click on [Sign in with One Healthcare ID](#)



- 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**.



Note: if you click on the **Training and Certifications** option, you will also find a link to Learning Lab.

Training & Certification

Learning Lab
Continuing Education

Learning Lab

Whether you're a new agent or a seasoned pro, Learning Lab is your one-stop shop for UnitedHealthcare Medicare Solutions training and certifications.

- The Medicare industry and the value of UnitedHealthcare to members
- The suite of tools UnitedHealthcare offers to improve the agent experience
- Product and program for members with a UnitedHealthcare plan
- How to remain compliant while selling UnitedHealthcare
- How to grow your business through industry leading sales skills
- And so many more!

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.

For more details on the certification process and technical requirements open the Certification User Guide in either [English](#) or [Spanish](#).

Find additional information on the most frequently asked Learning Lab questions [Launch Learning Lab >](#)

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.

2023 Tools & Technology

This learning path contains courses related to sy

Tools & Technology

Courses Additional References

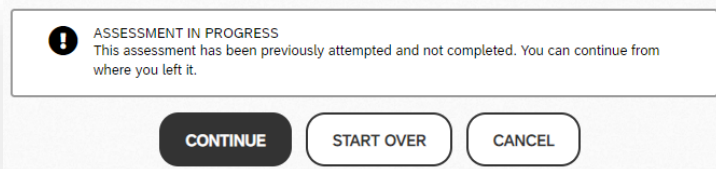
- > Field Leadership Portal Overview ⓘ
- > Health Assessment (HA) ⓘ
- > Jarvis ⓘ
- > LEAN ⓘ
- ▼ Learning Lab ⓘ
 - Welcome to Learning Lab (Video 2:23)
 - ✓ Learning Lab User Guide (and FAQ) for Sales Agents (Job Aid) ⓘ
 - ▶ Attending Instructor-Led Training Using Zoom (Job Aid) ⓘ

Attempts, Results and Progress

ATTEMPTS

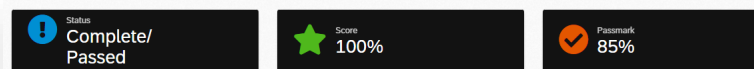
Attempts are counted when you complete an assessment. However, if you exit an assessment early and return to take it again, you will have **two options** which affect attempt counts: **Continue** or **Start Over**.

- Selecting Continue resumes the prior attempt.
- Selecting Start Over begins a new attempt and counts the previous early exit attempt.

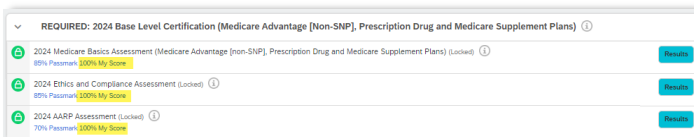


RESULTS

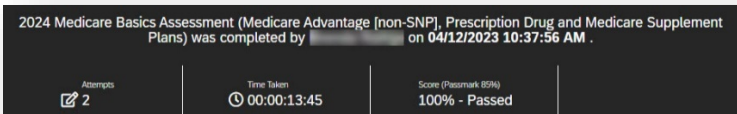
When you complete an assessment (either pass or fail), you will see the results.



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.

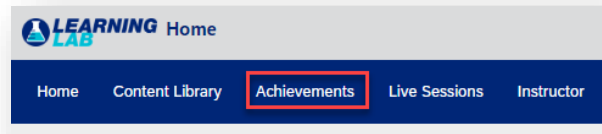


Achievements and Printing Certificates

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

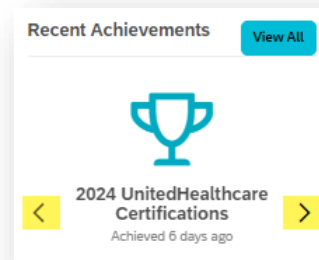
To view a list of your completed courses and modules from the [Home Page](#):

- 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.

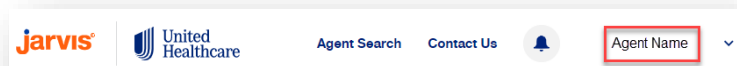


For a quick view of your most recent achievements:

- 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.



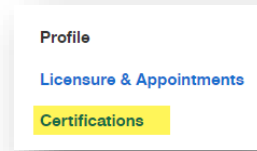
- To view a list of your completed certifications on [Jarvis](#), click on your [name](#).



- 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
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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+
 - 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.