UnitedHealthcare®

2022 Certification User Guide

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8.9.21

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2022 Annual Certification Requirements

UnitedHealthcare Certification Requirements

To solicit, present or sell any products in the UnitedHealthcare® Medicare Solutions portfolio (m*ay include plans branded UnitedHealthcare, AARP, Erickson, Medica HealthCare Plans, Peoples Health, 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 complete all the prerequisite assessments and the individual product assessments 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 Module), it is strongly recommended that you review the Certification Reference Guide before attempting the test.

Prerequisite Tests + **Product Tests** =

CERTIFIED 2022

A summary of the steps to certify is as follows:

1
- Complete all **PREREQUISITE TESTS** by passing with a score of **85% or higher within 6 attempts.**
- Failing any prerequisite test will block access to any other test and you will not be able to market or sell any UnitedHealthcare Medicare Solutions product for the plan year.
- Prerequisite tests must be taken in order:
  1) Medicare Basics*
  2) Ethics and Compliance
  3) AARP Module

2
- Complete the **PRODUCT TEST(s)** by passing with a score of **85% or higher within 6 attempts** or you will not be allowed to sell the applicable product for the plan year.
- Available product tests by type are:
  – Chronic Condition and Dual Special Needs Plans (CSNP/DSNP)
  – Institutional and Institutional-Equivalent Special Needs Plans (ISNP/IESNP)
  – Senior Care Options**
  – Events Basics (required for conducting any sales/marketing events)

* *Medicare Basics includes credit for Medicare Advantage Plans (non-Special Needs Plans), Prescription Drug Plans and Medicare Supplement Insurance Plans.*
***Available by invitation only. An attestation is provided for this invitation-only course. You must attest that you were invited to sell this plan/product.*

AHIP Certification for our EDC Partners
America's Health Insurance Plan (AHIP) Certification satisfies the requirement for the following UnitedHealthcare Medicare Solutions Certification Module: Medicare Basics Test (including Medicare Advantage, Prescription Drug and Medicare Supplement Plans). *See page 6 for instructions.*

Step 1: Complete all 3 Prerequisite Assessments

| Medicare Basics* | Ethics & Compliance | AARP Module*** |

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

*** AARP for 2022: all agents must complete the AARP Module to meet the AARP portion of the certification requirement.

Step 2: Complete Product Assessment(s) and/or Module(s)

I want to sell:

Medicare Advantage (MA) Plans
UnitedHealthcare, AARP, Medica HealthCare Plans, Preferred Care Partners, and Erickson branded HMO, POS, PPO and PFFS plans

AARP Prescription Drug Plans (PDP)

AARP Medicare Supplement Plans

Chronic Condition and Dual Special Needs Plans (CSNP/DSNP)
UnitedHealthcare, Medica HealthCare Plans, Preferred Care Partners, and Erickson

Institutional and Institutional-Equivalent Special Needs Plans (ISNP/IESNP)

Senior Care Options
UnitedHealthcare

I must complete this test:

Completion of all 3 prerequisite assessments provides certification for MA (non-SNP), PDP and Medicare Supplement Plans

Completion of all 3 prerequisite assessments AND Chronic Condition and Dual Special Needs Plans (CSNP/DSNP) assessment

Completion of all 3 prerequisite assessments AND Institutional and Institutional-Equivalent Special Needs Plans (invitation onlv)

Completion of all 3 prerequisite assessments AND Senior Care Options (invitation only)

Certification Instructions

1 Select the **Prerequisites Required Path** first (from your dashboard). These are the required modules that must be completed by all agents. *(Spanish is also available.)*
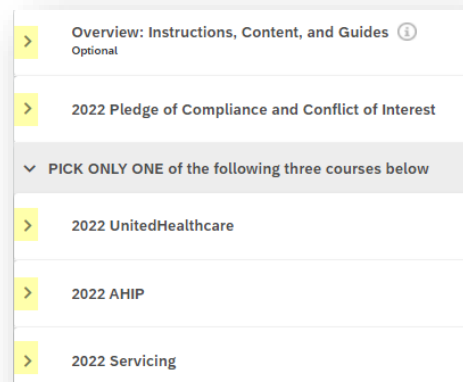

2022 UnitedHealthcare Certifications *(Prerequisites Required)*

2022 Certifications (Prerequisites Required)

Learning Path

2 Once you complete the Prerequisites Required Path, you may take the optional **Products and Events Paths** (from your dashboard). *Events Basics is required for conducting any sales/marketing events. (Spanish is also available.)*

2022 UnitedHealthcare Certifications *(Products & Events)*

2022 Certifications (Products and Events)

Learning Path

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> and UnitedHealthcare courses and modules **OR** <u>Servicing</u> only.

Clicking the **>** will show the modules required within each course.

Note: Servicing modules are for agents who are servicing plans only; completing these modules does NOT authorize you to sell any plans. When you begin this course, you must attest that you will be providing service only.


> Overview: Instructions, Content, and Guides ⓘ
> Optional

> 2022 Pledge of Compliance and Conflict of Interest

∨ PICK ONLY ONE of the following three courses below

> 2022 UnitedHealthcare

> 2022 AHIP

> 2022 Servicing

Start with the Overview! This course is where you will find **instructions** and ALL **content** needed to understand the prerequisites and product assessments.

- **Instructions:** This is a summary of the steps to certify that are covered in detail in this guide.
- **User Guide:** This is what you are reading now. The guide provides detailed certification requirements, instructions, and Learning Lab log in.
- **Reference Guide:** This guide provides all the content you need to learn for certifications. (There are no longer individual content modules.) It is organized by assessment topic; just click on the menu item you need to review. Especially good for new agents. You can access this eBook all year long anytime you need information.
    - **Navigation note:** The navigation in the top bar moves you through Learning Lab. It does not move you through the current module (Reference Guide). Be sure to use the menu on the left of the Reference Guide to move to different pages or sections.
- **What's New:** This highlights notable changes for the year.
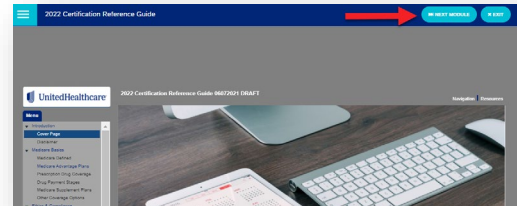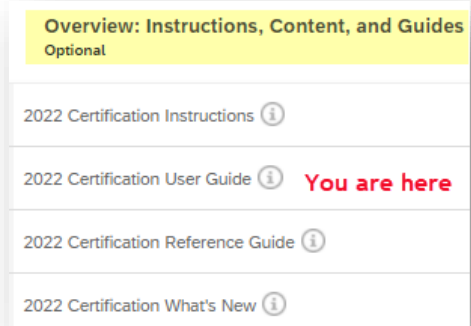
Begin the **required certifications** by clicking on the **2022 Certifications (Prerequisites Required)**. Six attempts* allowed.

1. Click on the **Pledge of Compliance and Conflict of Interest** course. You must complete these 3 modules before moving on.

   Conflict of Interest scoring is noted for internal purposes only. None of the scores will impact your ability to continue on with your certifications. Here is what the scoring means:
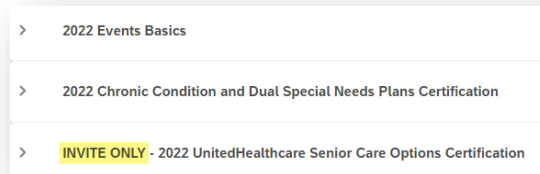   - You will not see a score if you indicated "No" conflict to report.
   - You will see a score of 50% if you indicated you had "previously" reported a conflict.
   - You will see a score of 100% if you indicated that you have a "new" conflict to report.

2. Click on **ONLY ONE** of the next 3 courses (UnitedHealthcare or AHIP or Servicing) in order to complete the remaining required modules such as Medicare Basics, Ethics and Compliance, and the AARP Module.

Note: Servicing modules are for agents who are servicing plans only; completing these modules does NOT authorize you to sell any plans. When you begin this course, you must attest that you will be providing service only.
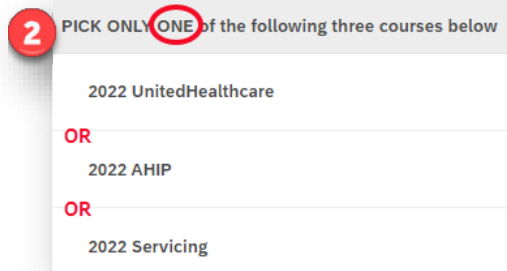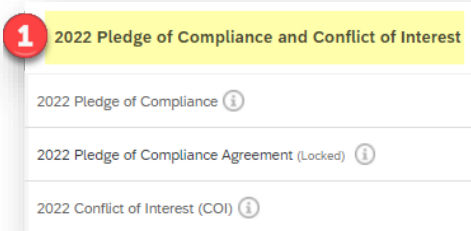
Access any **optional product or event assessments** by clicking on the **2022 Certifications (Products and Events)** path. Six attempts* allowed.

Note: Senior Care Options is by invitation only. You must attest to the invitation when you start this module.

>	2022 Events Basics
>	2022 Chronic Condition and Dual Special Needs Plans Certification
>	INVITE ONLY - 2022 UnitedHealthcare Senior Care Options Certification

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

AHIP Certification Instructions

AHIP Certification is NOT required. If you elect to do this, you will receive a $50 discount off the first AHIP purchase. Per policy, agents choosing to certify via AHIP must obtain a minimum score of 90% within six attempts. Each purchase consists of three attempts (UHC only acknowledges the initial two purchases). Prior to starting any course work you must follow the instructions below to access the AHIP/UHG co-branded website.

AHIP Certification satisfies the requirement for the following UnitedHealthcare Medicare Solutions Module: 2022 Medicare Basics Test (including Medicare Advantage, Medicare Prescription Drug and Medicare Supplement Insurance Plans). Agents certifying via AHIP are not considered certified in the AHIP equivalent products until they complete the remaining prerequisites:

- 2022 Pledge of Compliance and Conflict of Interest
- 2022 Ethics and Compliance
- 2022 AARP Module

If you elect AHIP, you do not need to complete the UnitedHealthcare Medicare Basics test.

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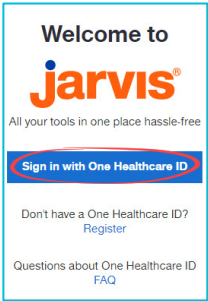
- Click on **Sign In with One Healthcare ID.**

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
FAQ

- 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

Additional options:
Create One Healthcare ID
Manage your One Healthcare ID
What is One Healthcare ID?

Sign In

Forgot One Healthcare ID | Forgot Password
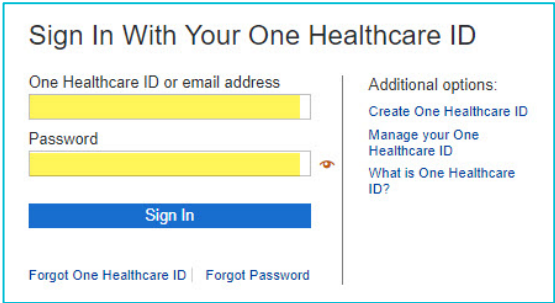
- Once you are logged into *Jarvis,* hover your mouse over the **Knowledge Center** tab and click on **Learning Lab.**
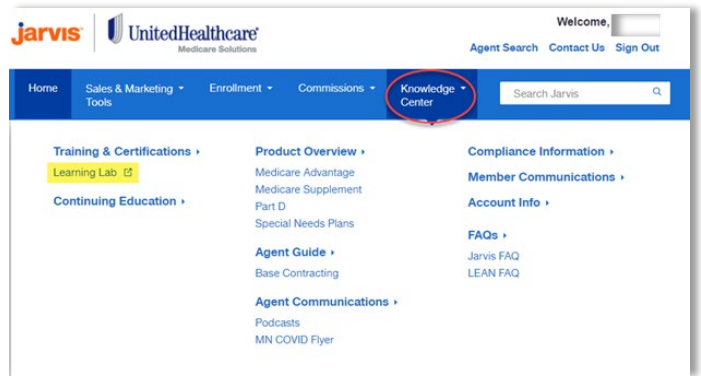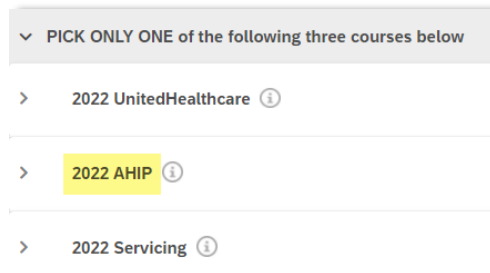

- Click on the **2022 Certifications** Learning Path (English or Spanish).
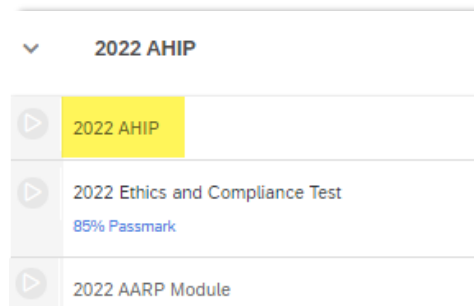

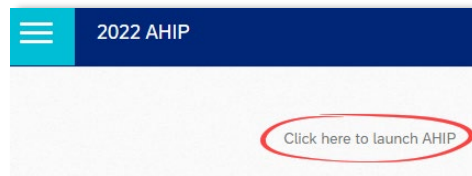- Complete the Pledge of Compliance and Conflict of Interest.

- Click on the **2022 AHIP** course.
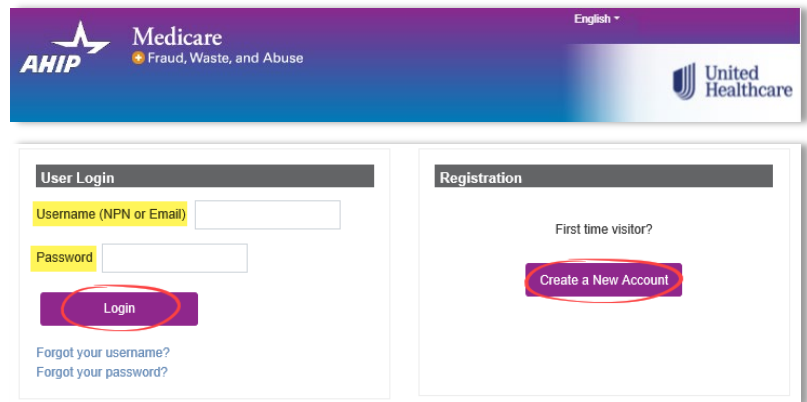

- Click on the **2022 AHIP** module.

- Select the link **Click here to launch AHIP.**
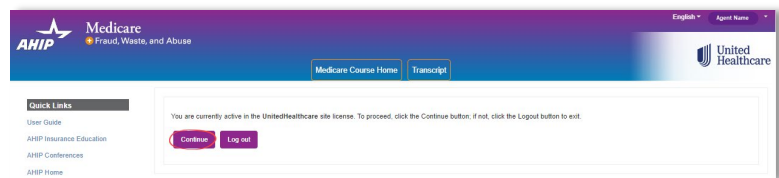

- Login with your **AHIP UserName** and **Password** OR register if you are a new AHIP user.

Important: Pay close attention to the website masthead because it confirms you are entering the UnitedHealthcare site license by displaying the UnitedHealthcare logo.

- Click **Continue** to confirm you are entering the active UnitedHealthcare site license.

- Click **Transmit** to send your results to UnitedHealthcare.
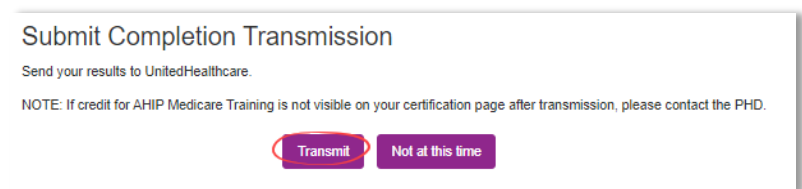
- Click **Logout** and return to Learning Lab. The 2022 AHIP will appear completed upon a successful transmission.
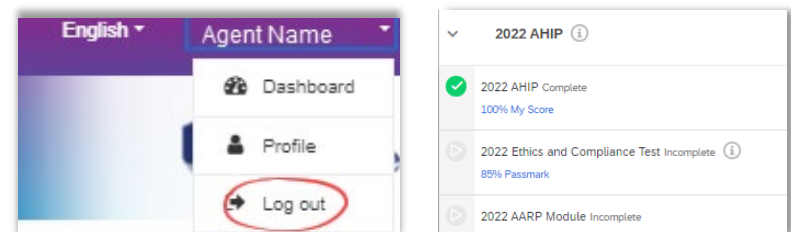
REMINDER: *For agents choosing to complete the 2022 AHIP, either directly from the AHIP website or through another carrier, you are still required to follow the above directions in order to transmit your results to UnitedHealthcare and receive credit for the equivalents. The UHC discount will be forfeited if you choose to certify directly from the AHIP website or through another carrier.*

Logging In

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**
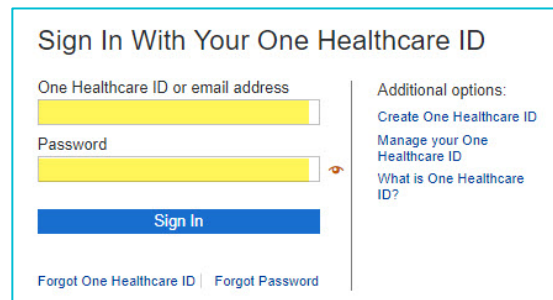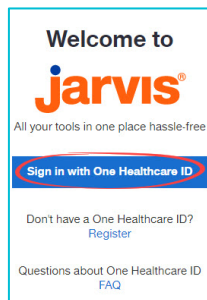
For log in or other assistance with Jarvis, contact the Producer Help Desk (PHD):
888-381-8581 *Monday – Friday 7 a.m. to 9 p.m. CT*

Accessing Learning Lab

Once you are logged into *Jarvis*, hover your mouse over the **Knowledge Center** tab and click on **Learning Lab**.
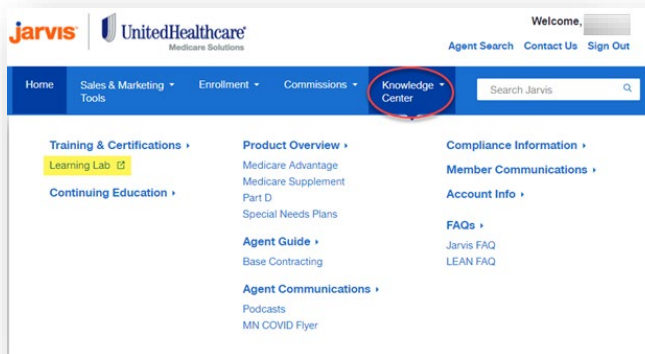
Note: if you click on the **Training and Certification** header, you will also find a link to Learning Lab.
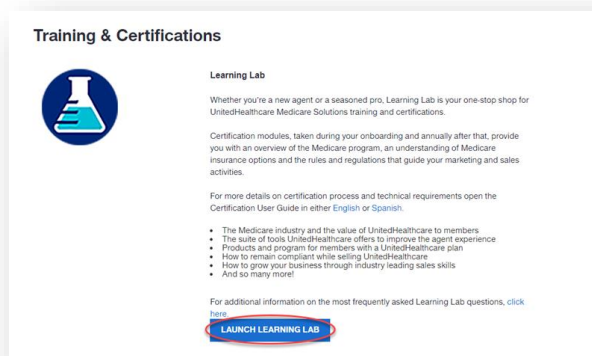
Learning Lab

Welcome Page

The opening page of the Learning Lab is the Welcome Screen. Click **Continue to my dashboard**.

Note: If you don't want to see this screen each time you log in, uncheck the box at the bottom of the screen.

Hello,

Welcome to Learning Lab! If this is your first time logging into the system be sure to check out the "Welcome Video!" for a quick overview of the tool. Additional training will be assigned based on how you will use the system.

Continue to my dashboard

☑ Always show this message on the Home page
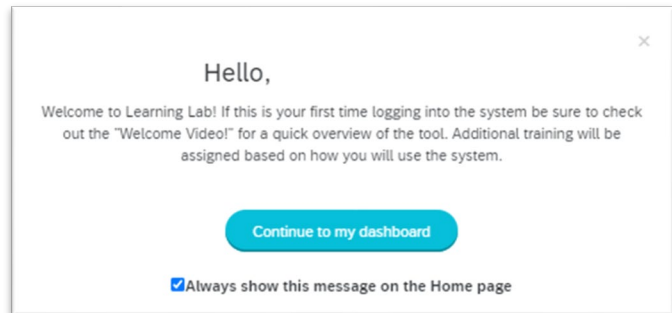
Learning Lab Home Page / Dashboard

The **Dashboard/Home Page** provides several navigation choices, located on the top of the screen.
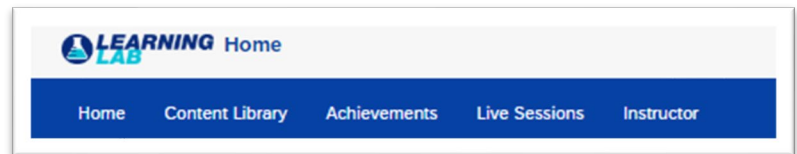
From the dashboard you can navigate to various pages, see your course progress, keep up on the latest news, and open paths and courses.
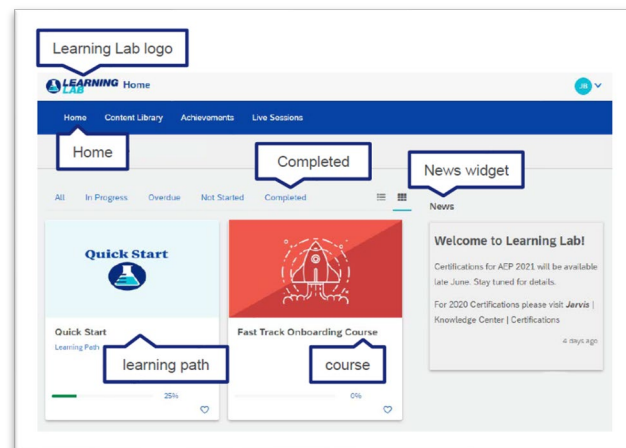
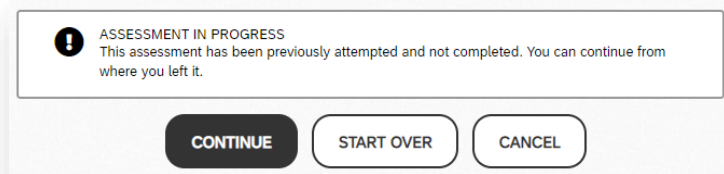The dashboard is also where your **certification path** choices are located.

Attempts, Results and Progress

ATTEMPTS

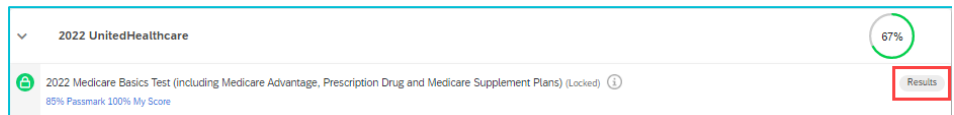Attempts are counted when you complete an assessment. However, if you exit an assessment early and return to take it again, you will have two options which affect attempt counts: **Continue** or **Start Over**.

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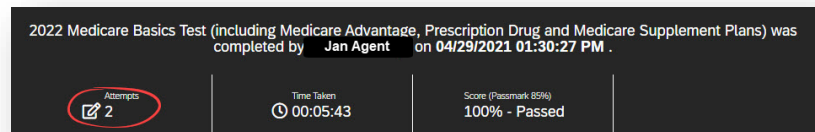- Selecting Start Over begins a new attempt and counts the previous early exit attempt.

> **ASSESSMENT IN PROGRESS**
> This assessment has been previously attempted and not completed. You can continue from where you left it.
>
> CONTINUE START OVER CANCEL

RESULTS

Once completed (either pass or fail), a results button appears.

> 2022 UnitedHealthcare 67%
>
> 2022 Medicare Basics Test (including Medicare Advantage, Prescription Drug and Medicare Supplement Plans) (Locked) ⓘ Results
> 85% Passmark 100% My Score

Click on the **Results** button to see the number of attempts used.

> 2022 Medicare Basics Test (including Medicare Advantage, Prescription Drug and Medicare Supplement Plans) was completed by Jan Agent on **04/29/2021 01:30:27 PM** .
>
> Attempts Time Taken Score (Passmark 85%)
> 2 00:05:43 100% - Passed

PROGRESS

Path Status is shown to the right of the path description.

> **2022 UnitedHealthcare Certifications** *(Prerequisites Required)*
>
> 2022 Certifications (Prerequisites Required)
> First, review the information and guides in the Overview course. While this is optional, it is where you will find instructions and ALL content needed to understand the prerequisites and product assessments. (There are no longer individual content modules; it's all in one!) 50%

Course Status is shown to the right of the course name.

Module Status is shown to the left of the module name.

> Overview: Instructions, Content, and Guides ⓘ Course Status 100%
> Optional
>
> Module Status
> ✓ 2022 Certification Instructions ⓘ
> ✓ 2022 Certification User Guide ⓘ
> ✓ 2022 Certification Reference Guide ⓘ
> ✓ 2022 Certification What's New ⓘ
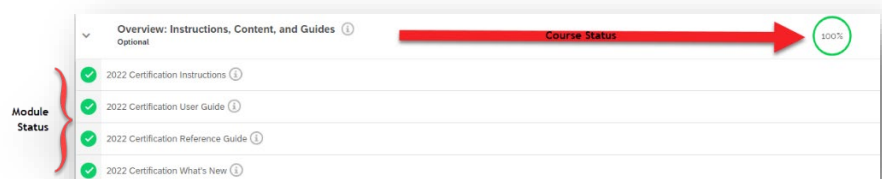
Important Progress Note: *When a path has both optional and required courses, the optional courses will NOT calculate into the path status total. If all courses in a path are optional, they will calculate into the path progress total. (Examples are provided below.)*

Optional and Required Courses in Same Path Example

In the prerequisites path, there is an optional "Overview" course, a required "Pledge" course, and a required equivalency course (UnitedHealthcare OR AHIP OR Servicing). Only the required courses are calculated in the path progress total.

The path is showing 100% progress because the required "Pledge" course and the required "UnitedHealthcare" course are both 100% completed.

The two equivalency courses (AHIP and Servicing) are not completed because you only need to complete 1 of the 3. Some of the modules in the equivalency courses are the same and so they show complete at the module level.

Optional Courses in Same Path Example

All courses in the "Products and Events" path are optional and are calculated in the path progress total.

The path is showing 67% progress because 2 of the 3 optional courses have been completed.
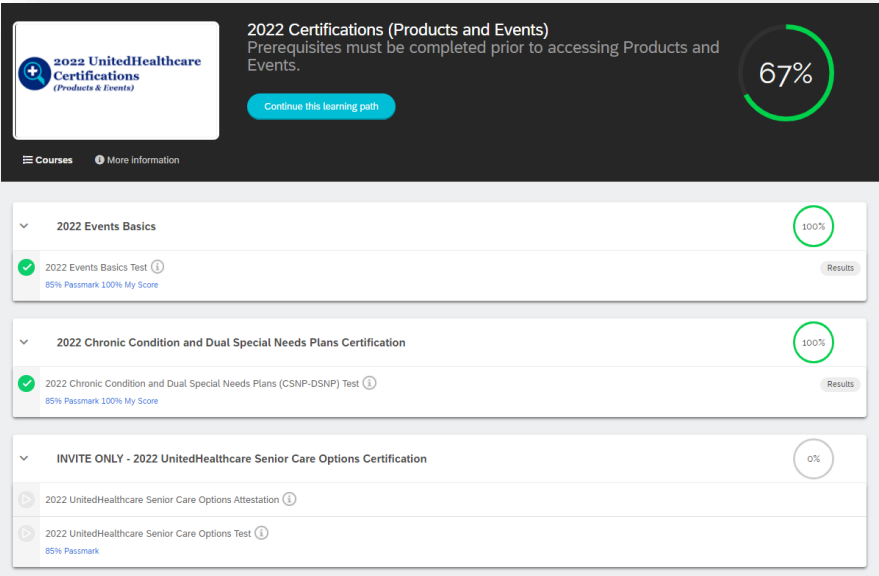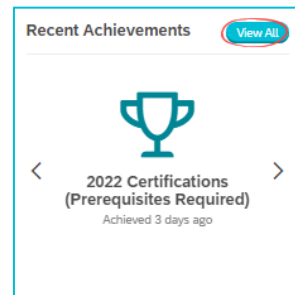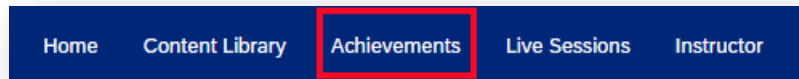
Achievements and Printing Certificates

Note: certificates are available for AHIP, Prerequisite Assessments, SNPs, and Events Basics.

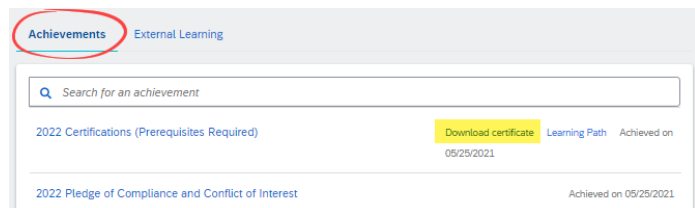To view a list of your completed courses and modules from the **Dashboard:**
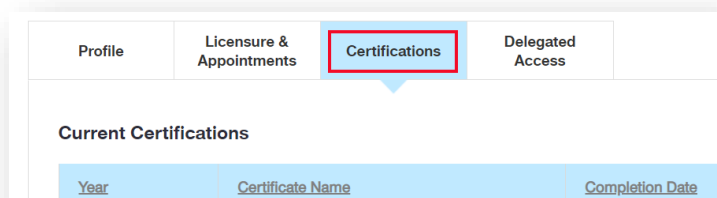- Click on the **Achievements** tab.

OR
- Click on **View All** in the **Recent Achievement** tile.

- Your completed courses will appear.

- Click **Download certificate** to obtain a printable copy.

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

- To view a list of your completed certifications, go to **Jarvis.** Click on your **name.**

- Click on the **Certifications Tab**.

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 a module or test, 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.