

## 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.**