



2022 Certification User Guide

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2022 Annual Certification Requirements

UnitedHealthcare Certification Requirements

To solicit, present or sell any products in the UnitedHealthcare® Medicare Solutions portfolio (may 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.



A summary of the steps to certify is as follows:

- 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
- 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 only)

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.)*



2

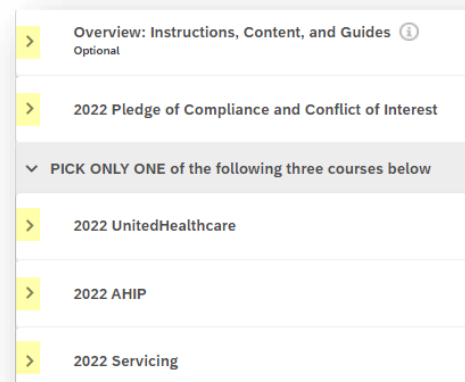
Once you complete the Prerequisites Required Path, you may take the optional **Products and Events Paths** (from your dashboard). *Events Basics is required for conducting any sales/marketing events. (Spanish is also available.)*



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 and UnitedHealthcare courses and modules **OR** Servicing 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.*

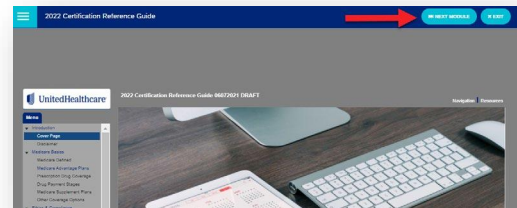
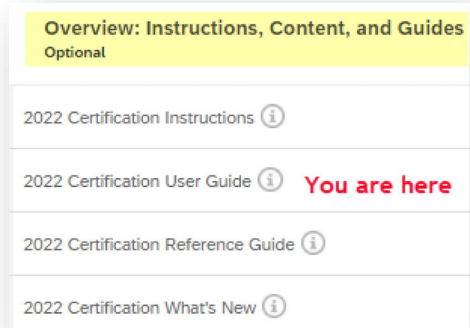


Start with the Overview! This course is where you will find **instructions** and **ALL content** needed to understand the prerequisites and product assessments.

- **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.

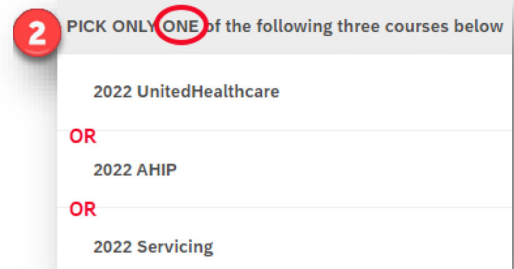
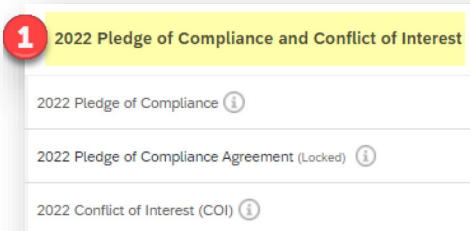
1. Click on the **Pledge of Compliance and Conflict of Interest** course. You must complete these 3 modules before moving on.

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.

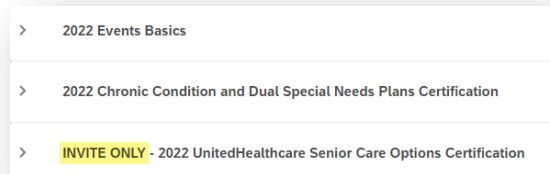
2. Click on **ONLY ONE** of the next 3 courses (UnitedHealthcare or AHIP or Servicing) in order to complete the remaining required modules such as Medicare Basics, Ethics and Compliance, and the AARP Module.

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.



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

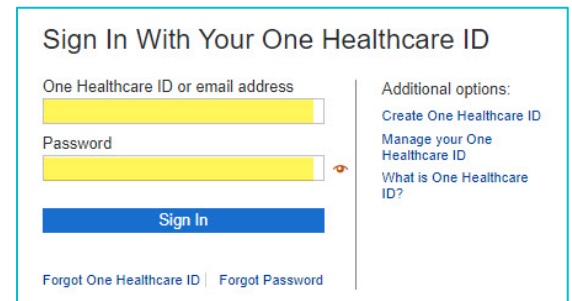
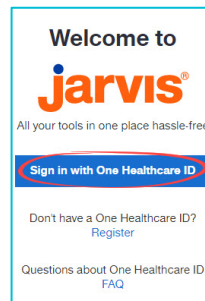
AHIP Certification Instructions

AHIP is currently updating their system and has not yet provided instructions and screen shots. We expect to have this information by June 28, 2021 and will provide an update User Guide at that time.

Logging In

Registered Users

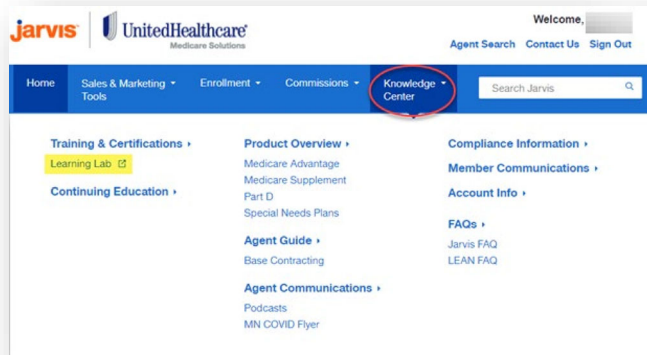
- Go to www.uhcjarvis.com
- Click on **Sign in with One Healthcare ID**
- Enter your One Healthcare ID and password
- Click on **Sign-In**



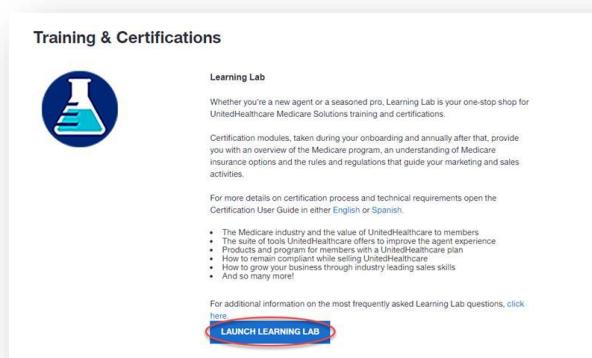
*For log in or other assistance with Jarvis, contact the Producer Help Desk (PHD):
888-381-8581 Monday – Friday 7 a.m. to 9 p.m. CT*

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.

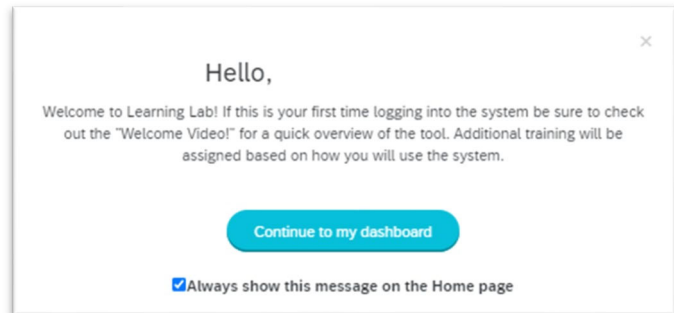


Learning Lab

Welcome Page

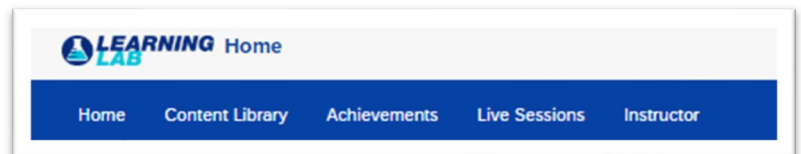
The opening page of the Learning Lab is the Welcome Screen. Click [Continue to my dashboard](#).

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

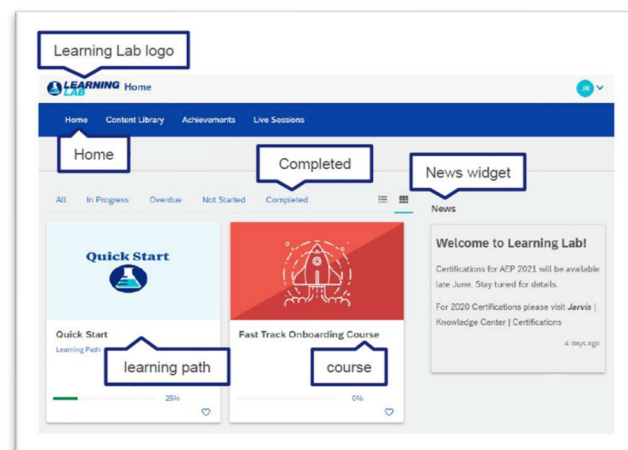


Learning Lab Home Page / Dashboard

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.



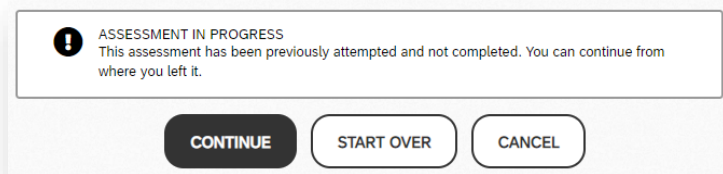
Attempts, Results and Progress

ATTEMPTS

Attempts are counted when you complete an assessment.

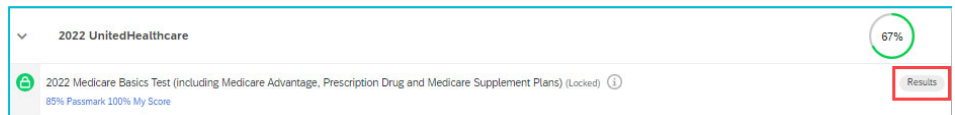
However, if you exit an assessment early and return to take it again, you will have two options which affect attempt counts: **Continue** or **Start Over**.

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

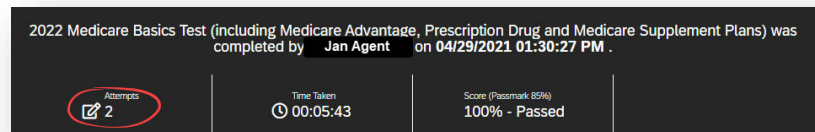


RESULTS

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

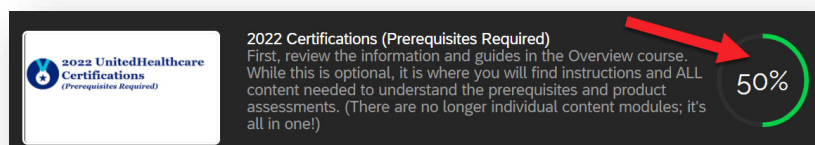


Click on the **Results** button to see the number of attempts used.



PROGRESS

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



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

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




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.



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!)

Second, complete the Pledge of Compliance and Conflict of Interest course. There are 3 modules required prior to completing the assessments.

Third, select ONLY ONE course for the prerequisites: UnitedHealthcare or AHIP or Servicing. You should NOT do more than one. This option will open up the assessments you need to take to complete the prerequisites such as Medicare Basics, Ethics and Compliance, and the AARP Module.

[Continue this learning path](#)

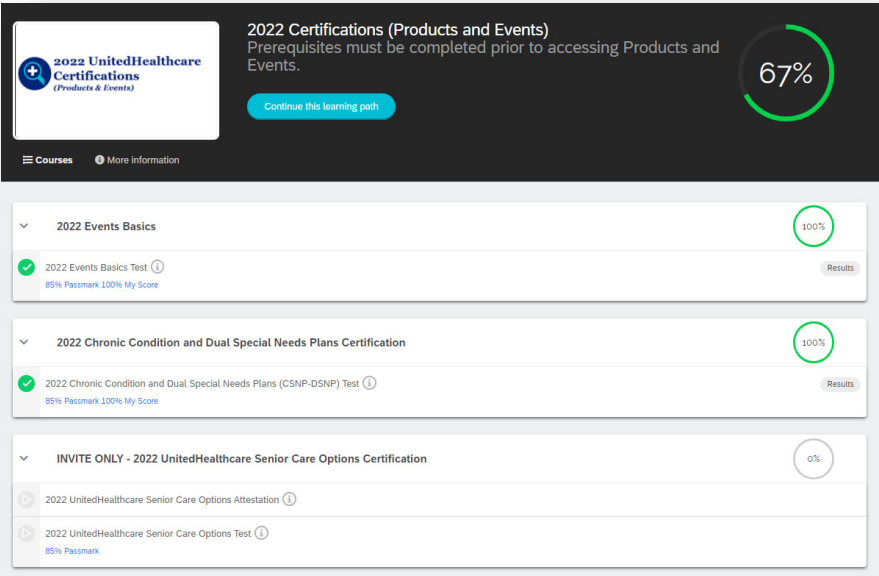
100%

Course Category	Course Name	Progress
Overview: Instructions, Content, and Guides (Optional)	2022 Certification Instructions	100%
	2022 Certification User Guide	100%
	2022 Certification Reference Guide	100%
	2022 Certification What's New	100%
	2022 Pledge of Compliance and Conflict of Interest	100%
2022 Pledge of Compliance and Conflict of Interest	2022 Pledge of Compliance	100%
	2022 Pledge of Compliance Agreement (locked)	100%
	2022 Conflict of Interest (COI)	100%
	PICK ONLY ONE of the following three courses below	
2022 UnitedHealthcare	2022 Medicare Basics Test (including Medicare Advantage, Prescription Drug and Medicare Supplement Plans)	100%
	2022 Ethics and Compliance Test	100%
	2022 AARP Module	100%
	2022 AHIP	0%
2022 AHIP	2022 AHIP	0%
	2022 Ethics and Compliance Test	100%
	2022 AARP Module	100%
	2022 Servicing	Servicing Attestation
2022 Medicare Basics Test (including Medicare Advantage, Prescription Drug and Medicare Supplement Plans)		100%
2022 Ethics and Compliance Test		100%

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

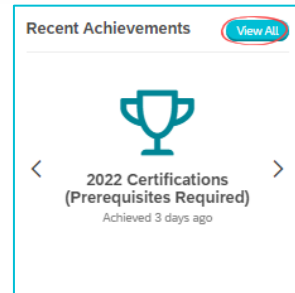
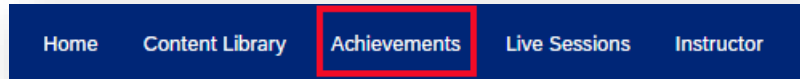
Note: certificates are available for AHIP, Prerequisite Assessments, SNPs, and Events Basics.

To view a list of your completed courses and modules from the **Dashboard**:

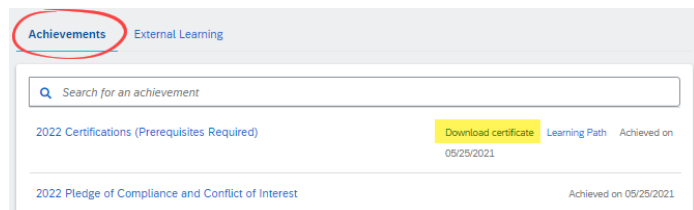
- Click on the **Achievements** tab.

OR

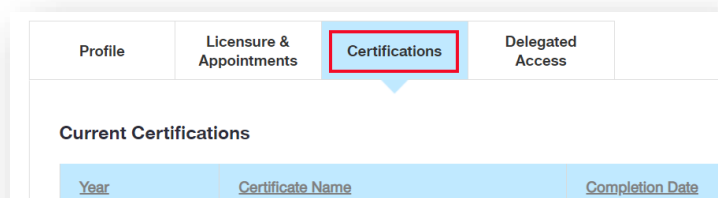
- Click on **View All** in the **Recent Achievement** tile.



- 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 (*wired connection is optimal*)
- Web Browser:
 - Google Chrome (*preferred*)
 - Internet Explorer 8+
 - Firefox 2+
 - Safari
- Javascript and Cookies Enabled
- Resolution – best viewed using a minimum screen resolution of 1024x768

Mobile Devices: (*not recommended for Certifications*)

- Apple iOS devices using Safari mobile web browser
- Android devices using Google Chrome mobile web browser

NOTE: Native iOS and Android mobile apps are also available.

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.