

# 2020 Certification User Guide



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# 2020 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:

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 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 Course

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\*\*

\* Medicare Basics includes credit for Medicare Advantage Plans (non-Special Needs Plans), Prescription Drug Plans and Medicare Supplement Insurance 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 (non-Special Needs Plans), Medicare Prescription Drug Plans, and Medicare Supplement Insurance Plans. **If you choose to certify via AHIP, you need to transmit the 2020 AHIP Certification before any other 2020 modules have been started. Failure to do so will result in AHIP score rejection.** (See page 5 for instructions.)

## Step 1: Complete all 3 Prerequisite Tests

Medicare Basics\*

Ethics &  
Compliance

❖ AARP Course

An EDC Agent must choose whether to pursue America's Health Insurance Plans (AHIP) Certification **before** starting the 2020 Medicare Basics\* Test. If an EDC Agent completes AHIP certification, they will get credit for Medicare Basics, which includes Medicare Advantage Plans (non-Special Needs Plans), Medicare Prescription Drug Plans, and Medicare Supplement Insurance Plans upon completion of the other two prerequisites tests.

❖ **AARP**—for 2020, all agents must complete the AARP course to meet the AARP portion of the certification requirement.

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

## Step 2: Complete Product Test(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 Medicare Supplement Plans

### Chronic Condition and Dual Special Needs Plans

UnitedHealthcare, Medica HealthCare Plans, Preferred Care Partners, and Erickson

### AARP Prescription Drug Plans (PDP)

### Institutional and Institutional-Equivalent Special Needs Plans

UnitedHealthcare and Erickson

### Senior Care Options

UnitedHealthcare

I must complete this test:

Completion of all 3 prerequisite tests provides certification for MA, PDP and Medicare Supplement Plans

Completion of all 3 prerequisite tests provides certification for MA, PDP and Medicare Supplement Plans

Chronic Condition and Dual Special Needs Plans

Completion of all 3 prerequisite tests provides certification for MA, PDP and Medicare Supplement Plans

Institutional and Institutional-Equivalent Special Needs Plans  
(invitation only)

Senior Care Options  
(invitation only)

## AHIP Certification Instructions (EDC Only)

***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 first enter the site by going through the [www.uhcjarvis.com](http://www.uhcjarvis.com) 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 2020 AHIP link you will be unable to access the 2020 Medicare Basis Test. Conversely, if you initially begin the 2020 Medicare Basics Test, you will be unable to access the 2020 AHIP link.

AHIP Certification satisfies the requirement for the following UnitedHealthcare Medicare Solutions Certification: 2020 Medicare Basics Test (including Medicare Advantage Plans [non-Special Needs Plans], Prescription Drug Plans, and Medicare Supplement Insurance Plans). If you choose the AHIP option, you will also be required to complete the following prerequisites: 2020 Ethics and Compliance and 2020 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).

**Note: If you choose to certify via AHIP, you need to complete the 2020 AHIP Certification before any other 2020 Certification tests. Failure to do so will result in AHIP score rejection.**

To begin 2020 UnitedHealthcare Medicare & Retirement certification using AHIP, complete the following steps:

1. Log into Jarvis ([www.uhcjarvis.com](http://www.uhcjarvis.com))
2. Click **Knowledge Center**
3. Click **Certifications**
4. Click on **Launch Certifications**
5. Click on **Certification** (Left-hand navigation menu)
6. Click **2020 AHIP (EDC Only)**
7. Select **OK** for the pop-up messages
8. Click **Launch**
9. Sign on with your AHIP username and password OR register if you are a new AHIP user
10. Select **Medicare Course Home**
11. Complete the assigned modules
  - Returning AHIP users will be assigned the recertification modules
  - New AHIP users will be assigned the full certification modules
12. Pass the test in 6 or fewer attempts with a score of 90% or higher
13. At the end of the test, go to the home page - Click **Transmit to United Healthcare**
14. Select **I Comply** when the Pledge of Compliance Screen appears
15. Once the "Congratulations" screen appears, return to the certification page

Next, you **must** pass the following tests:

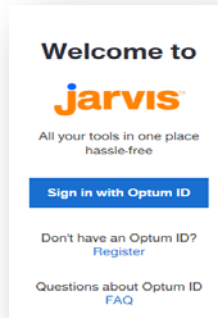
- 2020 Ethics and Compliance
- 2020 AARP® Course

**REMINDER:** For agents who choose to complete 2020 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 2020 tests. However, agents choosing to certify directly from the AHIP website or through another carrier will forfeit the UHC discount.

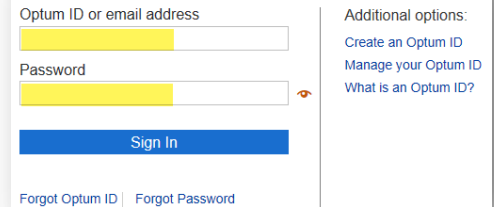
# Logging In

## Registered Users

- Go to [www.uhcjarvis.com](http://www.uhcjarvis.com)
- Click on [Sign in with Optum ID](#)
- Enter your [Optum ID](#) and [password](#)
- Click on [Sign-In](#)



## Sign In With Your Optum ID

A screenshot of the sign-in form. It has two input fields: "Optum ID or email address" and "Password", both with yellow highlights. Below the password field is a blue "Sign In" button. To the right, under "Additional options:", there are links for "Create an Optum ID", "Manage your Optum ID", and "What is an Optum ID?". At the bottom, there are links for "Forgot Optum ID" and "Forgot Password".

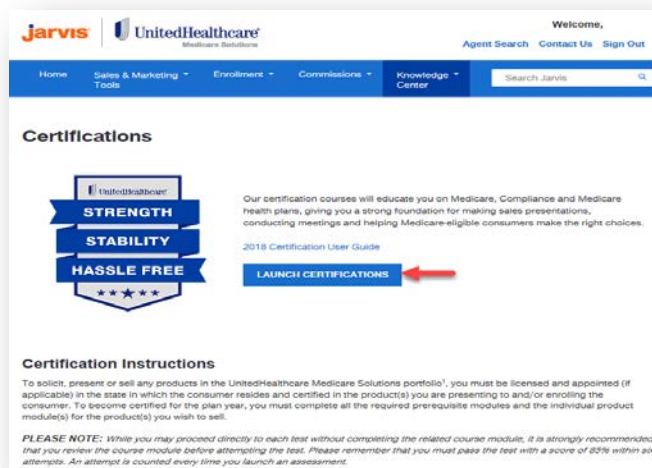
For log in or other assistance with Jarvis, contact the Producer Help Desk (PHD):  
**888-381-8581** Monday – Friday 7 a.m. to 9 p.m. CT

## Accessing Modules, Tests and Certificates

Once you are logged into Jarvis, hover your mouse over the [Knowledge Center](#) tab and click on [Certifications](#).



The Certifications home page will appear. Click on [Launch Certifications](#).



# Medicare Solutions Learning Center

## 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 2020 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 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 or allow pop-up blockers depending on the browser of choice
- Depending on your browser choice, you may need to turn on compatibility view. Do this by clicking Tools, then selecting Compatibility View. Make sure "[unitedhealthgroup.com](http://unitedhealthgroup.com)" 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, contact the Producer Help Desk (PHD): 888-381-8581 (Monday-Friday, 7 a.m. – 9 p.m., CST).

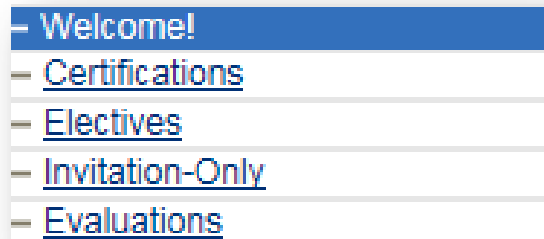
### Certification Instructions

To solicit, present or sell any products in the UnitedHealthcare Medicare Solutions portfolio<sup>1</sup>, 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.**

## Navigation Panel

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



## 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.

2020 AHIP		
	Status	Date Completed
2020 AHIP (EDC Only)	—	
If you do NOT want to certify via AHIP, proceed to the Prerequisites below. Agents choosing to certify via AHIP must click link above FIRST!		
2020 Prerequisites (including Medicare Advantage and Prescription Drug Plans)		
	Status	Date Completed
2020 Medicare Basics (including Medicare Advantage and Prescription Drug Plans)	—	
2020 Medicare Basics Test (including Medicare Advantage and Prescription Drug Plans)	—	
2020 Ethics and Compliance	—	
2020 Ethics and Compliance Test	—	
2020 AARP Course	—	
Successfully completing the prerequisites will certify you to sell Medicare Advantage, Prescription Drug and Medicare Supplement Plans.		
2020 Chronic Condition and Dual Special Needs Plans Certification		
	Status	Date Completed
2020 Chronic Condition and Dual Special Needs Plans (CSNP-DSNP)	—	
2020 Chronic Condition and Dual Special Needs Plans (CSNP-DSNP) Test	—	

## Certification Tests – Telesales Only

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

TELESALES PRODUCERS ONLY - 2020 Telesales Fundamentals (PSA, PDP EE, Group, C&S)		
	Status	Date Completed
2020 Medicare Basics Assessment - TS	—	
2020 Ethics and Compliance Assessment - TS	—	
2020 AARP Course - TS	—	
TELESALES PRODUCERS ONLY - 2020 Medicare Advantage (PSA, Group)		
	Status	Date Completed
2020 Medicare Advantage Assessment - TS	—	
TELESALES PRODUCERS ONLY - 2020 Part D (PSA, PDP EE, Group, C&S)		
	Status	Date Completed
2020 Medicare Part D Assessment - TS	—	
TELESALES PRODUCERS ONLY - 2020 Special Needs Plans (PSA & Group Existing)		
	Status	Date Completed
2020 Chronic Condition and Dual Special Needs Plans Assessment - TS	—	
TELESALES PRODUCERS ONLY - 2020 AARP Medicare Supplement (Group)		
	Status	Date Completed
2020 AARP Medicare Supplement Plans Assessment - TS	—	



## Elective Modules/Tests

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

2020 EDC Electives		
	Status	Date Completed
2020 Events Basics	—	
2020 Events Basics Test	—	
bConnected Leads	—	
bConnected Dispositions	—	
bConnected Meetings and Appointments	—	
bConnected System Set Up	—	
bConnected Dashboard	—	
2020 Open Enrollment Agent Meeting Process	—	
2020 UnitedHealthcare Retiree Solutions Overview	—	

**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.

2020 Institutional and Institutional-Equivalent Special Needs Plans Certification		
	Status	Date Completed
2020 Institutional and Institutional-Equivalent Special Needs Plans	—	
2020 Institutional and Institutional-Equivalent Special Needs Plans Test	—	


  

2020 UHC Senior Care Options Cert		
	Status	Date Completed
2020 UnitedHealthcare Senior Care Options	—	
2020 UnitedHealthcare Senior Care Options Test	—	

Invitation-Only Online Courses		
	Status	Date Completed
2019 Lead and Contact Issues	—	
2019 Lead and Contact Issues Test	—	
2019 Operational Issues	—	
2019 Operational Issues Test	—	
2019 Plan and Product Knowledge Issues	—	
2019 Plan and Product Knowledge Issues Test	—	
2019 Point-of-Sale and Post-Sales Issues	—	
2019 Point-of-Sale and Post-Sales Issues Test	—	
2019 Prohibited Activities	—	
2019 Prohibited Activities Test	—	
2019 Risks to Consumers and/or Organization	—	
2019 Risks to Consumers and/or Organization Test	—	


## 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  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  icon.

2020 Chronic Condition and Dual Special Needs Plans Certification		
	Status	Date Completed
2020 Chronic Condition and Dual Special Needs Plans (CSNP-DSNP)		05/06/2019
2020 Chronic Condition and Dual Special Needs Plans (CSNP-DSNP) Test		05/06/2019



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

# Technical Requirements

***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 "[unitedhealthgroup.com](http://unitedhealthgroup.com)" is added to the Compatibility View Settings popup box
- Preferred browsers are Internet Explorer (IE) or Google Chrome; if using IE, confirm you are using IE 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)