

# 2021 Certification User Guide



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# 2021 Annual Certification Requirements

## UnitedHealthcare Certification Instructions

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 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 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 Module: Medicare Basics Test (including Medicare Advantage, Prescription Drug and Medicare Supplement Plans). See page 5 for instructions.

## Step 1: Complete all 3 Prerequisite Assessments

Medicare Basics\*

Ethics & Compliance

AARP Course\*\*\*

An EDC Agent must choose whether to pursue America's Health Insurance Plans (AHIP) Certification **before starting the 2021 Medicare Basics\* Test**. If an EDC Agent completes AHIP certification, they will get credit for Medicare Basics Test upon completion of the other two prerequisites assessments.

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

\*\*\* AARP for 2021: all agents must complete the AARP course 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 Medicare Supplement Plans

#### Chronic Condition and Dual Special Needs Plans (CSNP/DSNP)

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

#### AARP Prescription Drug Plans (PDP)

#### Institutional and Institution-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 provides certification for MA (non-SNP), PDP and Medicare Supplement Plans.

Chronic Condition and Dual Special Needs Plans (CSNP/DSNP)

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

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

Senior Care Options  
(invitation only)

## AHIP Certification Instructions

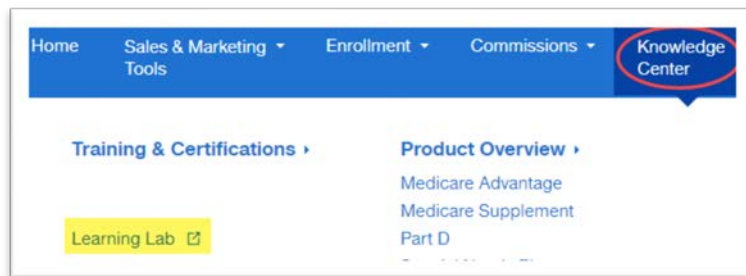
AHIP Certification is NOT required. If you elect to do this, you will receive a \$50 discount off the first AHIP purchase. Per policy, agents choosing to certify via AHIP must obtain a minimum score of 90% within six attempts. Each purchase consists of three attempts (UHC only acknowledges the initial 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: 2021 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:

- 2021 Pledge of Compliance
- 2021 Conflict of Interest
- 2021 Ethics and Compliance
- 2021 AARP Course

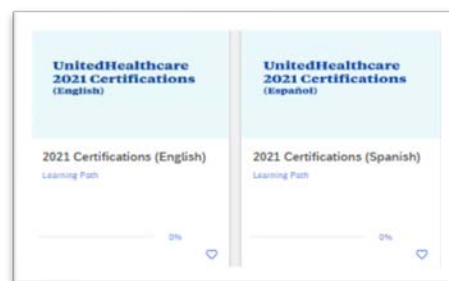
Once you have launched the 2021 AHIP link, the system will automatically transport you to our AHIP/UHG co-branded website where you will login to your AHIP account to purchase, complete and transmit your results to UnitedHealthcare. See below for instructions.

- Login to **Jarvis™**  
([www.uhcjarvis.com](http://www.uhcjarvis.com))

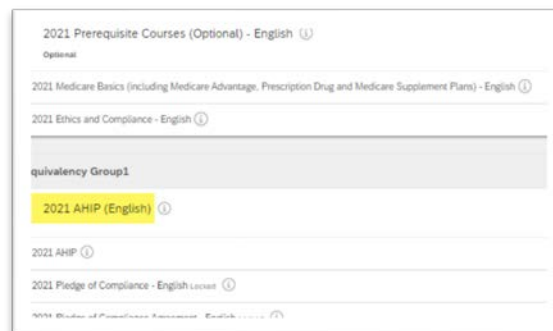


- Hover over **Knowledge Center**
- Click **Learning Lab**

- Click on the **2021 Certifications** Learning Path



- Click **2021 AHIP** Module

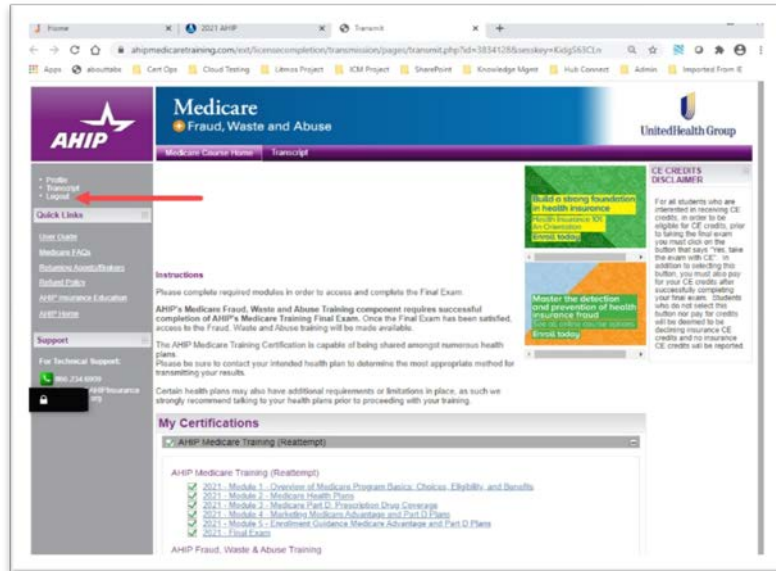


- Login with your **AHIP UserName** and **Password** OR register if you are a new AHIP user

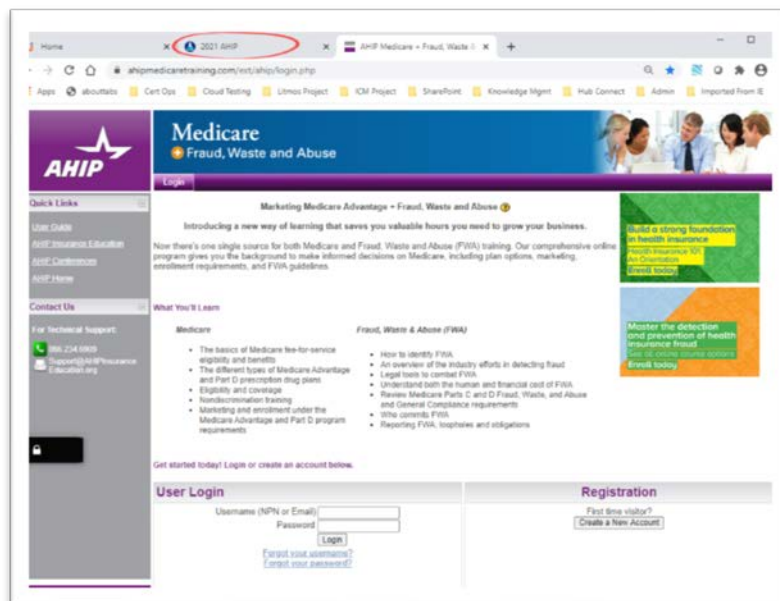
- Click **Continue** when this message appears
- Click **Transmit** to send your results to UnitedHealthcare



- Click **Logout**



- Click on the **2021 AHIP** tab



- Click on the **Exit** button to return to the certification page



- Successful transmission appears as shown.

**Next, continue completing the remaining prerequisites.**



**REMINDER:** For agents choosing to complete the 2021 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. The UHC discount will be forfeited if you choose to certify directly from the AHIP website or through another carrier.



# Logging In

## Registered Users

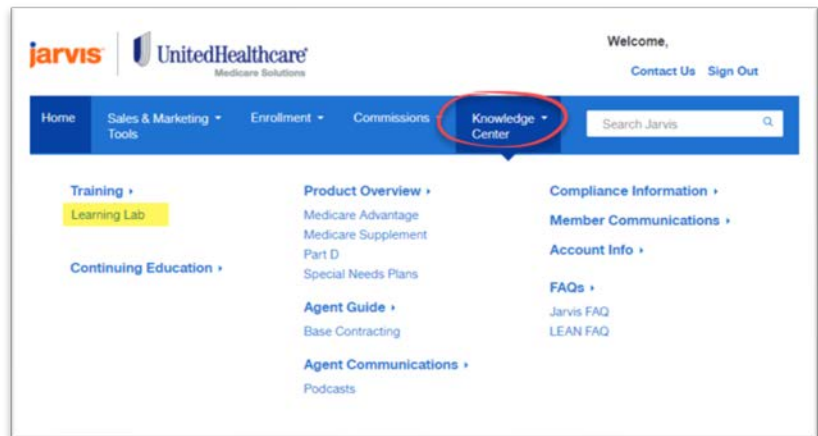
- Go to [www.uhcjarvis.com](http://www.uhcjarvis.com)
- Click on [Sign in with Optum ID](#)
- Enter your [Optum ID](#) and [password](#)
- Click on [Sign-In](#)



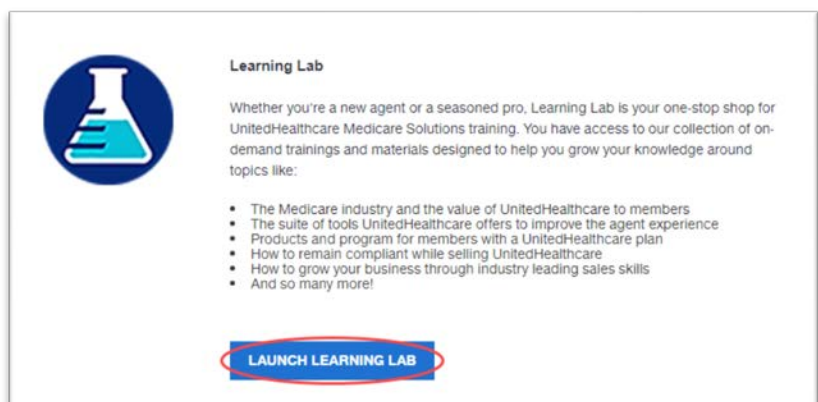
For log in or other assistance with Jarvis, contact the Producer Help Desk (PHD):  
**888-381-8581 Monday – Friday 7 a.m. to 9 p.m. CT**

## 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](#) header, you will also find a link to Learning Lab.



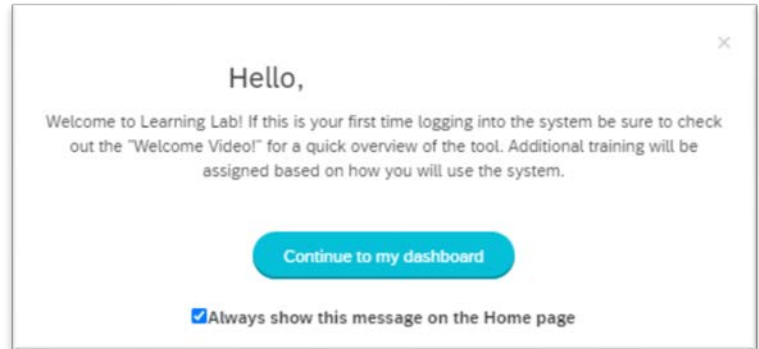


# Medicare Solutions Learning Center

## Welcome Page

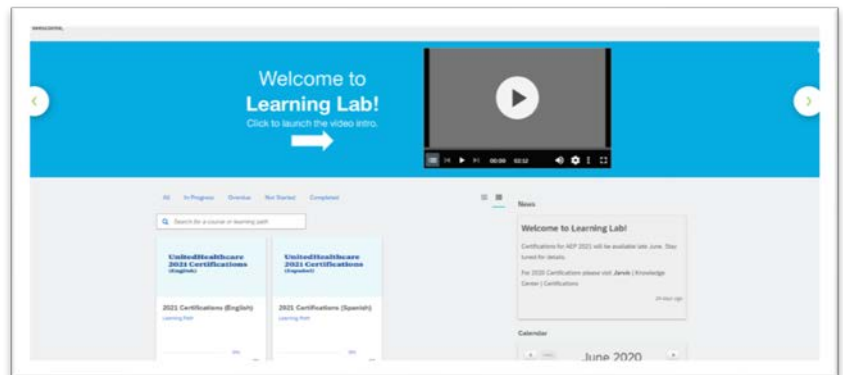
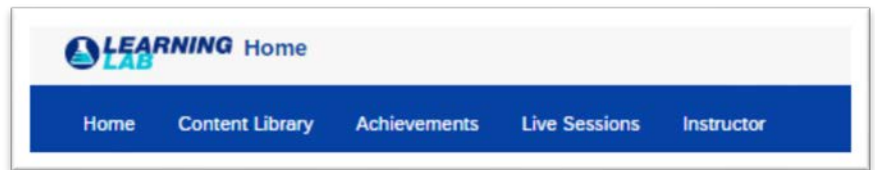
The opening page of the Learning Lab is the Welcome Screen. Click [Continue to my dashboard](#).

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

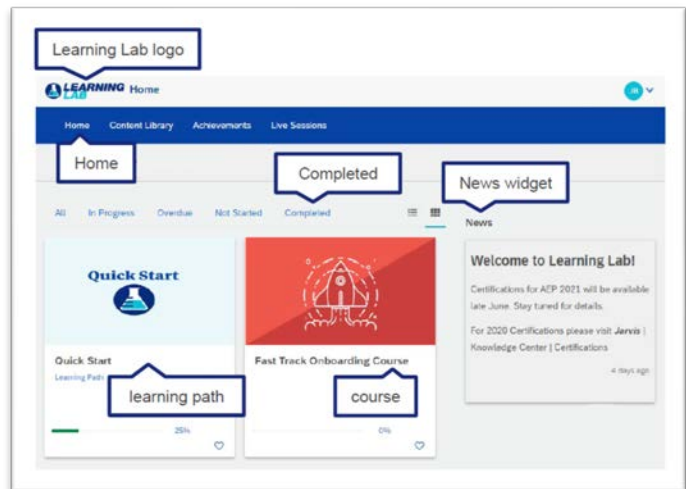


## Learning Lab Home Page / Dashboard

The Dashboard provides several navigation choices, located on the top of the screen.

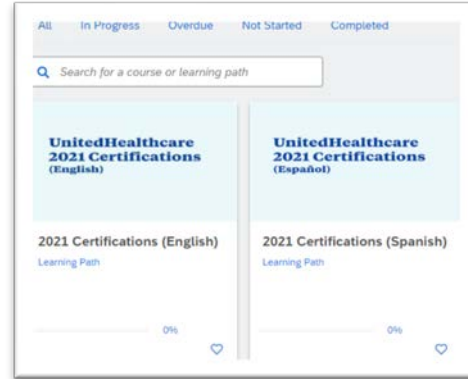


From the dashboard you can navigate to various pages, see your course progress, keep up on the latest news, and open paths and courses.



# Certification Learning Paths, Courses and Modules

On the Dashboard, click on the learning Path to view your certification modules.



- Each topic has two items listed: a **course** module which is optional and an **assessment** module which is required.
- Prerequisite assessments must be taken in order.
- Product assessments can be completed after the prerequisite assessments.
- Status completion and achievements can be viewed via the Dashboard.

**UnitedHealthcare  
2021 Certifications  
(English)**

### 2021 Certifications (English)

Agents wishing to pursue America's Health Insurance Plans (AHIP) Certification should select "2021 AHIP" in the learning path below. Upon completion of the AHIP module (which will link to the co-branded UnitedHealthcare/AHIP site) the agent will get credit for Medicare Basics which includes Medicare Advantage Plans (non-Special Needs Plans), Medicare Prescription Drug Plans, and Medicare Supplement Insurance Plans. Once the remaining modules in "2021 AHIP" are complete, the agent will receive credit for completion of "2021 Prerequisite Assessments."

Agents not pursuing AHIP should select "2021 Prerequisite Assessments" and complete all modules.

Agents wishing to sell special needs plans and/or host events must complete the certifications below.

0%

[Start this learning path](#)

**Courses**

2021 Prerequisite **Courses** (Optional) - English ⓘ  
Optional

0%

▶
2021 Medicare Basics (including Medicare Advantage, Prescription Drug and Medicare Supplement Plans) - English ⓘ

▶
2021 Ethics and Compliance - English ⓘ

Equivalency Group1

0%

▶
2021 AHIP - English ⓘ

🔒
2021 Pledge of Compliance - English Locked ⓘ

🔒
2021 Pledge of Compliance Agreement - English Locked ⓘ
100% Passmark

🔒
2021 Conflict of Interest Determination Help Scenarios - English Locked ⓘ

🔒
2021 Conflict of Interest Response - English Locked ⓘ

🔒
2021 Ethics and Compliance Test - English Locked ⓘ
85% Passmark

🔒
2021 AARP Course - English Locked

The modules in this course must be completed in the order listed.

2021 Prerequisite **Assessments** (Required) - English ⓘ

0%

▶
2021 Medicare Basics Test (including Medicare Advantage, Prescription Drug and Medicare Supplement Plans) - Original English ⓘ
85% Passmark

🔒
2021 Pledge of Compliance - Original English Locked ⓘ

🔒
2021 Pledge of Compliance Agreement - Original English Locked ⓘ
100% Passmark

🔒
2021 Conflict of Interest Determination Help Scenarios - Original English Locked ⓘ

🔒
2021 Conflict of Interest Response - Original English Locked ⓘ

🔒
2021 Ethics and Compliance Test - Original English Locked ⓘ
85% Passmark

🔒
2021 AARP Course Locked

The modules in this course must be completed in the order listed.

# Technical Requirements

## 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.*