UnitedHealthcare®
Medicare Solutions

Certification Information for the 2020 Selling Season

Certification for 2020 is underway at www.uhcjarvis.com in the Knowledge Center. Below are some tips as to how to make the certification process proceed smoothly. Be sure as you do your certification that your pop-up blocker is **off**, as the website and certification process is entirely built around pop-ups. Click here for more information on how to turn off your pop-up blockers.

The Jarvis website (www.uhcjarvis.com) is where the certifications are located. **The certifications should work with all major browsers!** Please let us know if you run into any browser incompatibility.

| Internet Explorer | Firefox | Chrome | Safari | Microsoft Edge |

Modules and tests are not compatible with mobile technology such as smart phones. iPads or tablets.

Please don't delay...... a "rush" at the end is liable to crash the system, and delay your ability to sell. Read on!

7-01-19

Who Must Certify

All agents must certify every year to be able to offer UnitedHealthcare Medicare products, including Medicare Supplements. If you have a **downline**, you must certify for any product that someone in your downline may sell (in other words, certify for **EVERYTHING!**). Corporations should certify using the Party ID for the Principal to log in and access the portal. The certifications for the principal will automatically merge over to the Corporation.

Commissions and overrides will not be paid unless certification is complete prior to the signature date of the app. (UPLINES ALSO NEED TO BE LICENSED AND APPOINTED IN ALL STATES IN WHICH YOU AND YOUR DOWNLINE MARKET!)

When Must You Certify

Certification is currently in progress. Certification must be completed before the website will allow you to order supplies. There is no "deadline" per se, but you must be certified prior to ordering materials or taking an application. **No commissions will be paid for applications dated prior to certification. No exceptions will be made.**

Where To Certify

To access the training, go to www.uhcjarvis.com. Sign In. If you have forgotten your Optum ID or Password, click on Sign In, and then on the appropriate link.
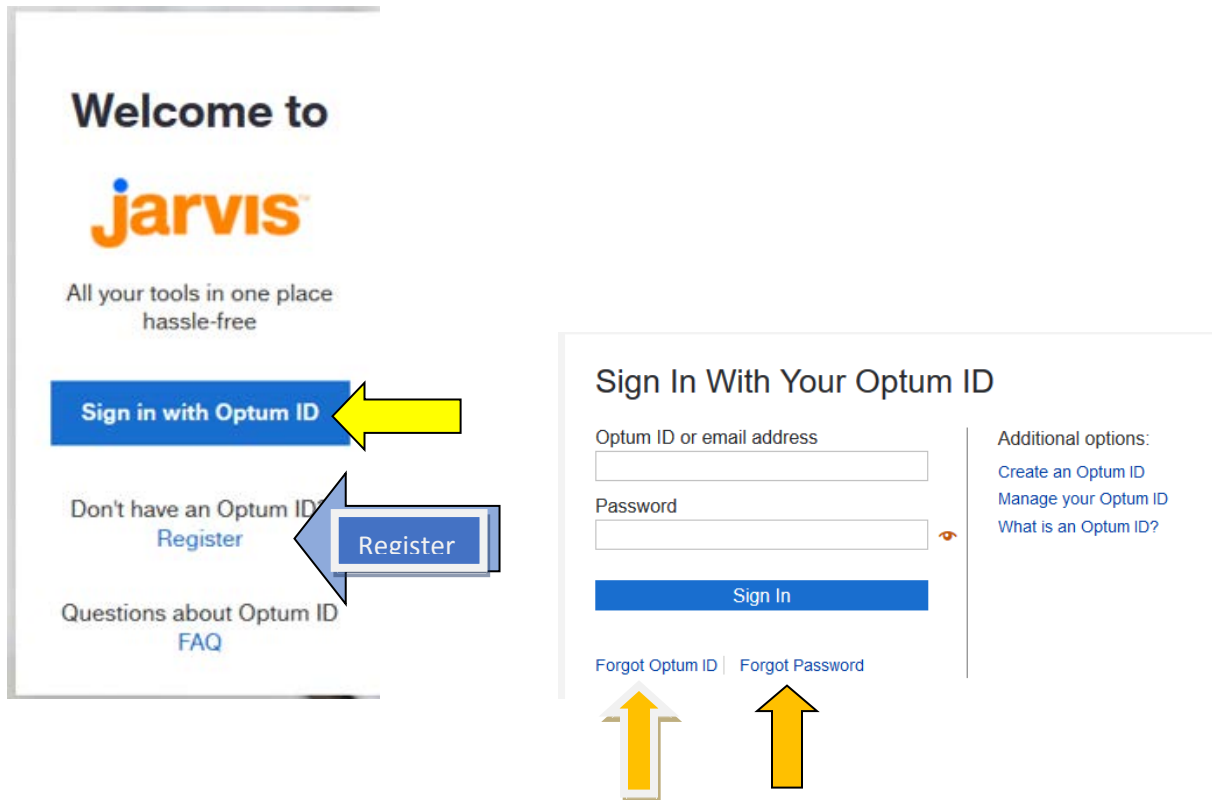
Once you are in the website, you should see a link to the **Knowledge Center**. Hover over Knowledge Center, and click on Certifications under Training.
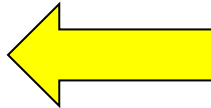
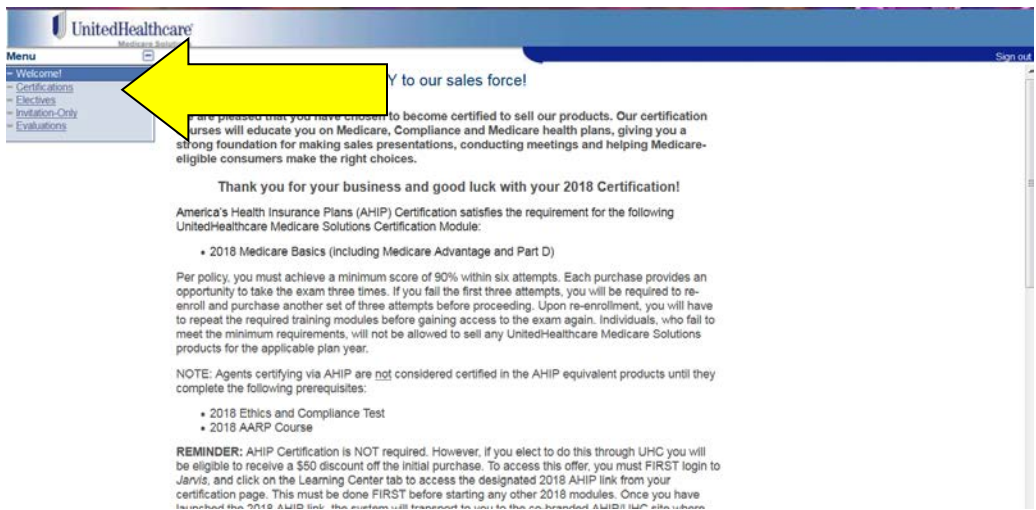Click that and then click the link to Launch Certifications.

When you access the Knowledge Center properly, a new window should open and it will look like this. (This should look exactly like certifications you have done for United in the past.)

Click on Certifications in the upper left.

You should then be taken to the course listings.

Course requirements have changed this year. The Medicare Advantage, Prescription Drug, **and Medicare Supplement** have all been rolled into the Medicare Basics module, so once the prerequisites are done you will be certified for Medicare Advantage, PDP, and Medicare Supplement without having to take additional product courses. **ALL AGENTS WHO WERE PREVIOUSLY DEAUTHORIZED FOR MEDICARE SUPPLEMENT WILL BE AUTHORIZED FOR THE 2020 PLAN YEAR UPON COMPLETING THE CERTIFICATION**. The CMS FWA course materials have been rolled into the Ethics course, so you will no longer have to complete the CMS FWA course through the CMS website. The course material will launch easily from the Ethics course. This should greatly streamline your certifications this year. There will still be product modules for Chronic/Dual plans.

 It should initially look like this:

2020	2019	2018	2017	2016

2020 AHIP (EDC Only)

	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	—	

Click the module name to launch the course, and then click the Launch link.

Table Of Contents			
Title			
2020 Medicare Basics-FS-06172019 original			
2020 Medicare Basics-FS-06172019 original			Launch
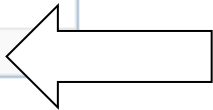
If you are asked to Enable Adobe Flash, please enable it.

Click to enable Adobe Flash Player
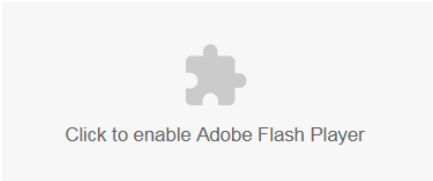
After completing the module, you must also complete the test!

2020 Medicare Basics Test (including Medicare Advantage and Prescription Drug Plans)

At the end of the course, be sure to hit the Submit button before exiting the screen.

Click the SUBMIT button below when you are finished.

Note: Review your development for a list of other modules and assessments you need to complete and to see which products you are certified to offer.

UnitedHealthcare®
Medicare Solutions

SUBMIT
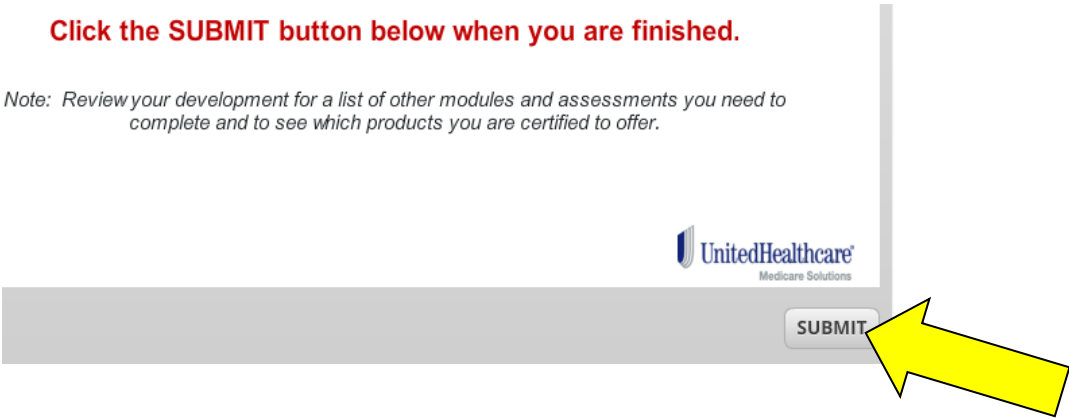
Completed certifications will have a gold medallion, as well as green check marks for the modules and tests. You will receive one gold medallion (for MAPD, PDP, AND Med Sup) upon completion of the Basics.

2020 Prerequisites (including Medicare Advantage and Prescription Drug Plans)	Status	Date Completed	Print
2020 Medicare Basics (including Medicare Advantage and Prescription Drug Plans)	✔	07/01/2019	
2020 Medicare Basics Test (including Medicare Advantage and Prescription Drug Plans)	✔	07/01/2019	07/02/2019
2020 Ethics and Compliance	✔	07/01/2019	
2020 Ethics and Compliance Test	✔	07/01/2019	
2020 AARP Course	✔	07/02/2019	

Successfully completing the prerequisites will certify you to sell Medicare Advantage, Prescription Drug and Medicare Supplement Plans.

Status

If your testing has been started but is incomplete, you will have a blue "in process" arrow.

<u>AHIP</u>

UnitedHealthcare does not require AHIP testing, but will give credit for the basic and 3 product modules if you have completed the course. If you have completed AHIP certification, and wish to transfer the AHIP credit to satisfy the basic UHC requirements, click on **AHIP** in the products section 2020 AHIP (EDC Only), and **do that first**. (You must *pull* it from United, you can't *push* it from AHIP.) If you are not transferring AHIP credit, do not choose AHIP in the product section. If you want to take the AHIP course and get the $50 discount on their normal price ($125 instead of $175), click on the AHIP course 2020 AHIP (EDC Only) under your course list FIRST. It will take you to the AHIP site where you can take the discounted test.

2020 AHIP (EDC Only)		
	Status	Date Completed
2020 AHIP (EDC Only)	—	

<p style="color:red; font-weight:bold; text-align:center">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!</p>

You will still need to complete the remaining prerequisite modules and tests (Ethics and Compliance, and 2020 AARP) before you receive certification credit for the Med Advantage, Med Supp, and Drug Plan products. Until that time, the "medallion" will remain gray. It will only turn gold when all requirements are complete.
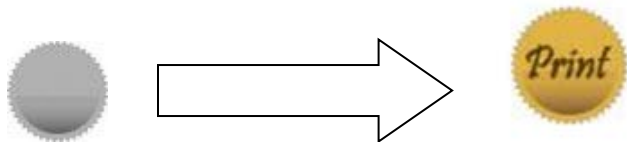
If you wish to complete the AHIP certification through UnitedHealthCare (not required), **please click here** for more information and step by step instructions. You will click on the module 2020 AHIP (EDC Only) and log into the AHIP website from there. Going through the UnitedHealth Producers website to access AHIP will give you a reduced cost, if you are not transferring, but are taking the test. **If you have already completed the Basics modules, you will NOT be able to access or transfer AHIP.**

The minimum passing score for an AHIP module is 90%. *AHIP courses are purchased in groups of three attempts. An agent who fails to pass the AHIP course within six attempts is not permitted to restart the certification process through UnitedHealthcare and is not permitted to sell any UnitedHealthcare Medicare Solutions products for the applicable plan year.* For more information on the transfer process, click here. **Do NOT** click on the basics course after transferring AHIP credit. This could cause your coursework to be problematic.

Again, if you are transferring AHIP credit, you must PULL it from the United side. (PUSHING it from the AHIP side won't work.)

Conflict of Interest Disclosure

In an effort to make the annual disclosure to a conflict of interest seamless while you are already certifying with UnitedHealthcare, the 2020 Ethics and Compliance prerequisite test includes, in addition to the Pledge of Compliance, a conflict of interest status disclosure.

- Your response **will not** affect your ability to proceed with the certification process with UnitedHealthcare
- Some common situations that create a potential for conflict of interest include you or your immediate family member has a direct or indirect ownership interest, or an employment relationship, or position of influence with a healthcare provider or UnitedHealthcare business partner, or a UnitedHealthcare employee manages, or is managed by, a family member within their sales organization reporting structure
- The key to staying compliant is disclosing any potential conflict of interest you may have
- Contact your local sales leader or the PHD to learn more about the UnitedHealthcare conflict of interest policy or with questions

This year, the options are better explained. IF you have a conflict, you can expect a follow-up from United in the weeks to come.

What to Certify For

Once you are in the Learning Center, your courses will be loaded for you.   The Basics course will provide product credit for Medicare Advantage, Prescription Drug Plans, and Medicare Supplements. If you were previously deauthorized for Medicare Supplements, you will be re-authorized for 2020 upon completion of the 2020 certification. You must complete the product-specific modules and tests for SNP plans (Dual and Chronic are combined in one certification) if you sell those products. **If you are not completing the AHIP, or transferring AHIP credit, you do not need to do the AHIP module.**

If you are a new producer, any 2020 certifications you complete will cover you for the rest of 2019 as well.

If you have a downline, please certify for **all products**.

If you are working a retail location during AEP, please certify for **all** products offered in your area, whether you plan on actively marketing them or not. Also, be sure to complete the Retail module, called **Events Basics**, which is located in the **Elective** section of the Learning Center. You will also find informational modules on Open Enrollment Agent Meeting Process, as well as modules on bConnected. Several other elective modules are located here as well.

There may be additional certification requirements for agents working retail...these should be communicated to you via the local Agent Managers who are coordinating the retail efforts.
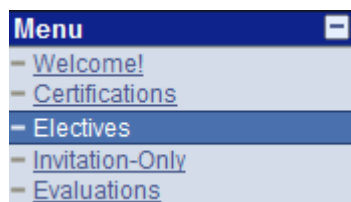
Menu	
– Welcome!	
– Certifications	
– Electives	2020 Events Basics
– Invitation-Only	2020 Events Basics Test
– Evaluations	

If you have a downline, please certify for **all products**.

After you complete all the Prerequisite courses, and after each product certification completed, UnitedHealthcare will send you an email confirming your completion. If you don't receive these, it is possible United does not have your current email on file. Contact the Producer Help Desk at 888-381-8581, or update your info by clicking on your blue hyperlinked name in the upper right corner of the home page (after logging in)

Welcome, YOUR NAME HERE

Agent Search   Contact Us   Sign Out

I'm Set Up as a Corporation. How Do I Certify?

If you are appointed as a corporation, you will certify under the Party ID/Writing Number you have as the Principal. The Principal and Corporation should be tied together, and certifying once should cover certification requirements for both. Contact us, or the Producer Help Desk (888-381-8581), if you don't know the Party ID/Writing Number for the Principal. (You should also be able to find it on your commission statement.)

What other help is available?

Individual technical problems accessing the certification should be directed to the Producer Help Desk at 888-381-8581.

Additional Tips

The certification process and module instructions are very well explained in the first few slides of the modules. Be sure to read this information.

Reminder: You cannot have both the course and test open at the same time. It is recommended that if you are experiencing difficulty answering the test questions, please review the course information and/or resources **PRIOR** to launching the test. Accessing course information and/or resources AFTER you have launched the test will have an attempt counted due to exiting the test prior to completion. Better yet, download a copy of the module BEFORE accessing the test. That will allow you to view the material and not count as an attempt. Please Download a copy of the module if you wish to refer to it during the test.

To download a copy of the module, click on the Resources tab. You will find this once you get into the module, in the upper right hand corner:

https://odplms.unitedhealthgroup.com/lmcontent/345422-539623_352969/index_lms_html5.html?AICC_SID=171406063%3a352969%3aA001&AICC_URL=https%3a%2f%2fodplms.unitedhealthgroup....

Resources | Navigation

UnitedHealthcare

Menu
- 1. Welcome
  - 1.1. Cover Page
  - 1.2. Certification Requirements
  - 1.3. Learning Objectives
- 2. Medicare
  - 2.1. What is Medicare?
  - 2.2. Original Medicare
- 3. Part C: Medicare Advantage
  - 3.1. Part C
  - 3.2. Consumer Characteristics
  - 3.3. Types of Medicare Advantage Plans
  - 3.4. PFFS-Deeming
  - 3.5. Enrollment Details
  - 3.6. Enrollment Complaints
  - 3.7. Case Study - MA
  - 3.8. Case Study Question - MA
- 4. Part D: Prescription Drug Coverage
  - 4.1. Part D
  - 4.2. The Benefit Structure
  - 4.3. Consumer Characteristics
  - 4.4. How to obtain Drug Coverage
  - 4.5. Unsuitable Plan Enrollment

UnitedHealthcare®

2020 Certification
Medicare Basics
including Medicare Advantage,
Prescription Drug and
Medicare Supplement Plans

Course Length: 30-45 minutes

NEXT ›

Resources and Reference Materials

Many resources and reference materials are available on *Jarvis* to supplement your training:

- Agent Guide
- Agent Hosted Events
- Election Period Booklet
- Provider Search Job Aid
- Provider Search Best Practices

- Sales Policy Job Aids:
  - Enrollment Handbook
  - Formal Marketing-Sales Events
  - Marketing and Generic Materials
  - Scope of Appointment

Click here to access *Jarvis.*

Jarvis

Click here to access a PDF of this course.

Course PDF

In addition, you may find the following links helpful:

CMS.gov   **Medicare.gov**   **MedicareMadeClear.com**

6-6-2018

In the center of the Resources tab will be a link to view the PDF of the course. This is a very large file, and may take a few minutes to open. You can print this, save it to your computer, or keep it open on your computer as you go through the module and test. Some test questions are very picky, and having the module available to view will give you a distinct advantage. You will likely not be able to get back to view the module if you do not pass the test, so we HIGHLY RECOMMEND downloading the module at the beginning. Having a copy saved will also give you a resource to refer to as questions come up throughout the year. **You must download the**

module PRIOR to accessing the test. You will not be allowed to go back to the course to download it once the test phase has begun.

You CANNOT have the course open on one computer and the test on another. If you want to view the module during testing, please use the downloaded PDF.

Reminder: You cannot have both the course and test open at the same time. It is recommended that if you are experiencing difficulty answering the test questions, please review the course information and/or resources **PRIOR** to launching the test. Accessing course information and/or resources AFTER you have launched the test will have an attempt counted due to exiting the test prior to completion.

Upon answering a question, immediate feedback will let you know if you answered the question correctly or incorrectly. This will be helpful to know to focus your review of the modules, in the event you should need to take the assessment again.

Be sure to hit the Submit button at the end of the test.
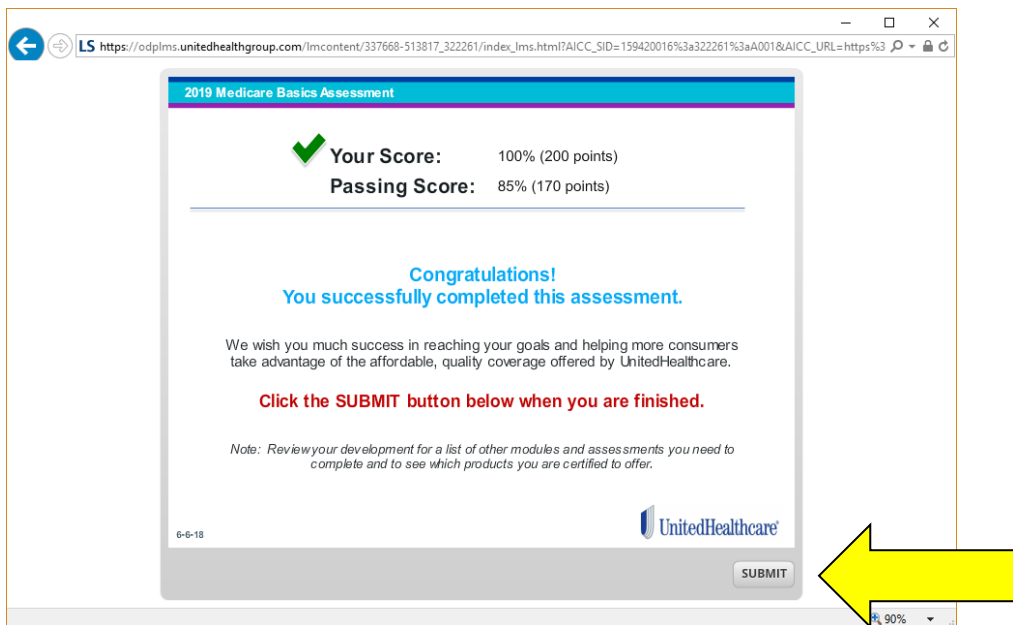
The Ethics module has a section to report any Conflicts of Interest. Most of you have NO CONFLICT. If you have no conflict, just click Submit to advance to the next page.

2020 Ethics and Compliance

Check the boxes for any scenarios that apply to you, then press SUBMIT.
If none of these apply to you, just click SUBMIT.
(Hover over underlined terms to see an example.)

☐ You OR an immediate family member have an <u>ownership interest</u> in a health care provider or UnitedHealthcare business partner (e.g., vendor, equipment or service provider, supplier, and manufacturer)?

☐ You OR an immediate family member are an <u>employee, contractor, or consultant</u> of a health care provider or UnitedHealthcare business partner (e.g., vendor, equipment or service provider, supplier, manufacturer)?

☐ You OR an immediate family member hold a <u>position of influence</u> with a health care provider or UnitedHealthcare business partner (e.g., vendor, equipment or service provider, supplier, manufacturer)?

☐ You are employed by UnitedHealth Group or its affiliate **and** have an immediate <u>family member who is an agent appointed</u> with UnitedHealthcare?

☐ You are contracted with UnitedHealthcare **and** have an immediate <u>family member who is an employee</u> of UnitedHealth Group or its affiliate?

☐ You are employed by UnitedHealth Group or its affiliate in a <u>non-agent role</u> **and** <u>simultaneously</u> able to write **new** insurance business (e.g., health, life, property/casualty) for UnitedHealthcare and/or another insurance carrier?

6-22-19   🛡 UnitedHealthcare

‹ PREV   SUBMIT
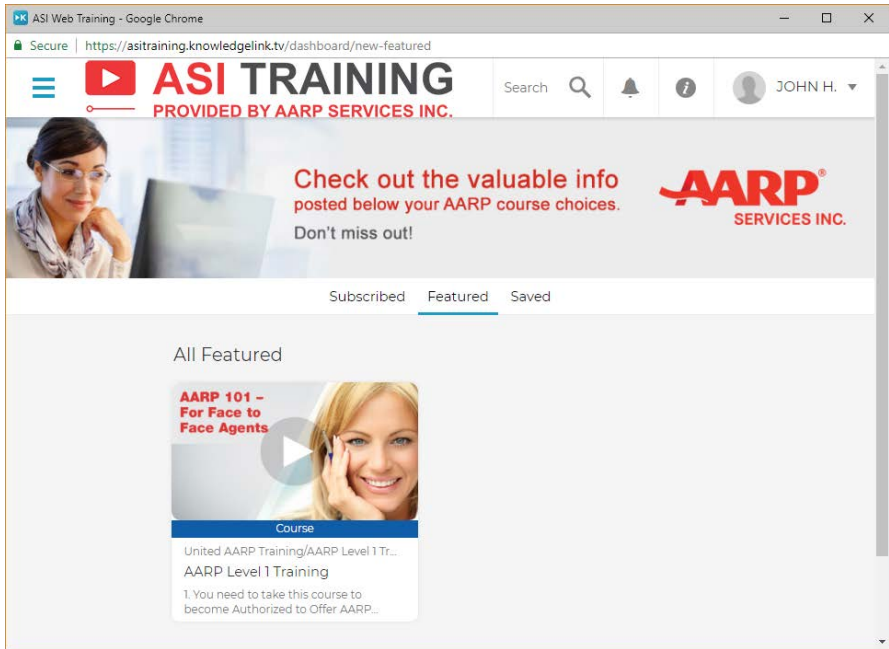

2020 Ethics and Compliance

2 **Conflict of Interest Attestation**

Select the option that applies to you.

○ I need to disclose a conflict of interest.

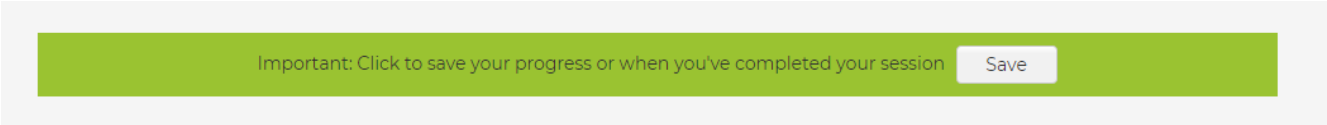◉ I **do not** need to disclose a conflict of interest.

AARP Course

The AARP course consists of several videos, followed by short quizzes.

There is also a short **survey** after each quiz.

After you complete each section, be sure to click Save in the green bar.

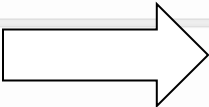
Important: Click to save your progress or when you've completed your session   Save

Be sure each survey is complete.   The one below still shows Not Started.

Click the Expand button to double check.

Once your status shows as Completed, you will be given credit for this module.

If your computer does not have sound, click on the closed captioning button.

This will show the text for the slide. This is especially important in the AARP Course, as there are tests at the end of each module.

As you complete courses and tests, you should receive green check marks to show your progress, as well as a gold medallion for product certifications (dual and chronic). There is one medallion for prerequisite courses, as you will receive certification for Medicare Advantage, Prescription Drug, and Medicare Supplements.

Be sure to print a copy of your score page, or your completion certificate, and keep it in your records. When there are commission disputes for lack of product certification, you will need this proof in order to release commissions. Certification must be completed prior to ordering materials or the signature date of the app.

   Click on the "Print" button to print your certificate.

An incomplete course or test will be shown with a blue round arrow.

You should receive an email from United when you complete a **product** certification. If you do not receive the email, you either did not complete the test, or United does not have a correct email address on file for you. Contact the Producer Help Desk at **888-381-8581.**

Remember, the prerequisite courses only certify you for the Medicare Advantage, Prescription Drug, and Medicare Supplement products. There is an additional course and test for the Chronic and Dual plans.

If you have any question about whether or not a certification has been completed, or if you have any technical issues with the certification, contact the Producer Help Desk at **888-381-8581**.

You will have six attempts to complete the assessment with a passing score. Each time you launch the assessment an attempt is counted, whether you complete the assessment or not. **NOTE:** Be sure you have the right equipment, connection, and be sure to schedule uninterrupted time in order to complete the entire assessment without losing an attempt. If your computer crashes or you lose your internet connection while in the middle of the test for example, it would count as an attempt. Failure of a prerequisite course will prevent you from being able to offer **any** UnitedHealthCare Medicare Products for the 2020 season. If you are having trouble certifying, please contact your upline before it's too late!

For the UnitedHealthcare 2020 Certification User Guide, click here!

Final tips from United:

- You will need to disable all pop up blockers.
- You will also need to disable any toolbars other than the standard Windows toolbar (I.E. Yahoo, Google, AOL, MSN etc).
- You will need to have the Macromedia Flash player.
- You may need to add the site (www.uhcjarvis.com) to your Secure Site listing in order to avoid possible issues with your firewall.

If after using these trouble-shooting tips you are still experiencing issues accessing your certifications, please contact the Producer Help desk (888) 381-8581 or via email PHD@uhc.com. Please be sure to provide the following:

1) User name
2) Password
3) Web address that you are accessing
4) The name of the specific course/certification that you are trying to take
5) The error message (if any) that you have been presented with.

We anticipate and expect our agents act with the highest degree of integrity. We would like to remind you that UnitedHealthcare Medicare Solutions takes a zero tolerance stand on unethical behavior and our policies and procedures strictly prohibit activities that are not in the best interest of those we serve.

Art Jetter & Company

seniorhealth@jetter.com

(800) 228-0008

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