2018 Certification User Guide

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2018 Annual Certification Requirements

To solicit, present or sell any products in the UnitedHealthcare Medicare Solutions portfolio (m*ay include plans branded UnitedHealthcare, AARP, Medica HealthCare Plans, Preferred Care Partners, or Sierra*), 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.

Prerequisite Tests (modules optional) **+** Product Tests (modules optional) **=** UnitedHealthcare CERTIFIED ★★★★★ 2018

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:
    - AARP® Medicare Supplement Insurance Plans
    - 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 and Prescription Drug 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 and Medicare Prescription Drug Plans. **If you choose to certify via AHIP, you need to transmit the 2018 AHIP Certification before any other 2018 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 <u>before</u> starting the 2018 Medicare Basics* Test. If an EDC Agent completes AHIP certification, they will get credit for Medicare Basics, which includes Medicare Advantage Plans and Medicare Prescription Drug Plans, upon completion of the other two prerequisites tests.
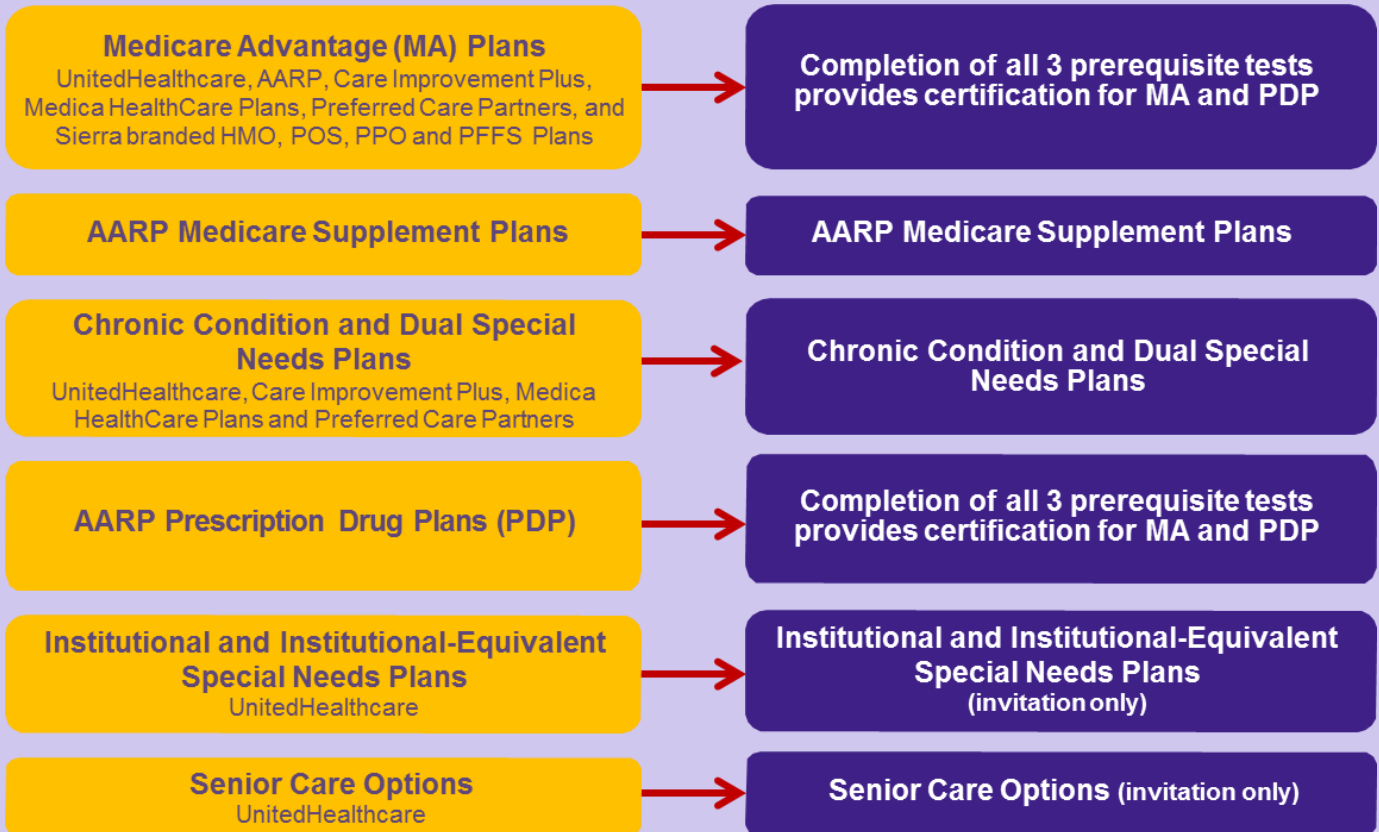
❖ **AARP--returning producers** now have additional choices. Complete just one of the following to meet the AARP portion of the certification requirement:
   o AARP Refresher (Traditional course for returning producers)
   o AARP Membership Benefits
   o AARP Good Works
   o AARP Communicating with Today's 50+ Consumer
   o AARP Being Relevant and AARP Multicultural Engagements

* Medicare Basics includes credit for Medicare Advantage and Prescription Drug Plans.

Step 2: Complete Product Test(s) and/or Module(s)

I want to sell: I must complete this test:

I want to sell:	I must complete this test:
Medicare Advantage (MA) Plans UnitedHealthcare, AARP, Care Improvement Plus, Medica HealthCare Plans, Preferred Care Partners, and Sierra branded HMO, POS, PPO and PFFS Plans	**Completion of all 3 prerequisite tests provides certification for MA and PDP**
AARP Medicare Supplement Plans	**AARP Medicare Supplement Plans**
Chronic Condition and Dual Special Needs Plans UnitedHealthcare, Care Improvement Plus, Medica HealthCare Plans and Preferred Care Partners	**Chronic Condition and Dual Special Needs Plans**
AARP Prescription Drug Plans (PDP)	**Completion of all 3 prerequisite tests provides certification for MA and PDP**
Institutional and Institutional-Equivalent Special Needs Plans UnitedHealthcare	**Institutional and Institutional-Equivalent Special Needs Plans** **(invitation only)**
Senior Care Options UnitedHealthcare	**Senior Care Options (invitation only)**

CMS Fraud, Waste and Abuse Requirement

All agents must attest annually to completing the Centers for Medicare & Medicaid Services (CMS) Fraud, Waste, and Abuse (FWA) training. UnitedHealthcare captures the attestation as part of the annual Pledge of Compliance, which you must sign at the beginning of the Ethics and Compliance certification test by selecting the "I Agree to Comply" button. The CMS Fraud, Waste and Abuse training course is available within both the Ethics and Compliance course and assessment. Review the course and attest to it within the Pledge of Compliance.

All agents must complete, retain, and make available upon request the certificate of completion that can be found at the end of the CMS Fraud, Waste, and Abuse training.

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 Knowledge Center to access the AHIP link found on the certification page. Also, after you begin the 2018 Medicare Basics Test, you will **not** be allowed to select AHIP for certification.

AHIP Certification satisfies the requirement for the following UnitedHealthcare Medicare Solutions Certification Test: 2018 Medicare Basics (including Medicare Advantage and Part D). If you choose the AHIP option, you will also be required to complete the following prerequisites: 2018 Ethics and Compliance and 2018 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: As part of the AHIP Certification process, AHIP requires completion of the CMS Fraud, Waste, and Abuse course. You will be asked if you need to take the training or not. If you do need the training, click on the appropriate link. If you don't need the training, click on the "proceed to attestation" link. Please note that if you have completed AHIP's version of the CMS Fraud, Waste, and Abuse course, you will not need to go through it again. Agents will simply attest to having completed the CMS requirement via the attestation in the 2018 Ethics and Compliance Test.

If you choose to certify via AHIP, you need to complete the 2018 AHIP Certification before any other 2018 Certification tests. Failure to do so will result in AHIP score rejection.

To begin 2018 UnitedHealthcare Medicare & Retirement certification using AHIP, complete the following steps:

1. Log in to www.uhcjarvis.com
2. Click Knowledge Center
3. Click on "Certification" (Left-hand navigation menu)
4. Click "2018 AHIP (EDC Only)"
5. Select OK to the following two pop-up messages
6. Click "Launch"
7. Sign on with your AHIP username and password **OR** register if you are a new AHIP user
8. Select "Medicare Course Home"
9. Complete the assigned modules
   - Returning AHIP users will be assigned the recertification modules
   - New AHIP users will be assigned the full certification modules
10. Pass the test in 6 or fewer attempts with a score of 90% or higher
11. At the end of the test, go to the home page - Click "Transmit to United Healthcare"

12. Select the "I Comply" button when the Pledge of Compliance Screen appears
13. Once the "Congratulations" screen appears return to the development plan

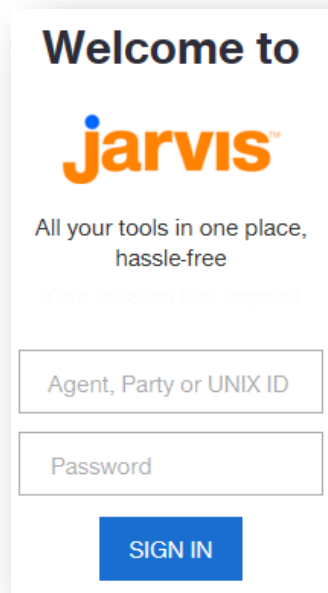Next, you ***must*** pass the following tests:

- 2018 Ethics and Compliance
- 2018 AARP® Course

REMINDER: For agents who choose to complete 2018 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 any other 2018 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
- Enter your **Agent or Party 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, 7a.m to 8p.m. CT)

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**.

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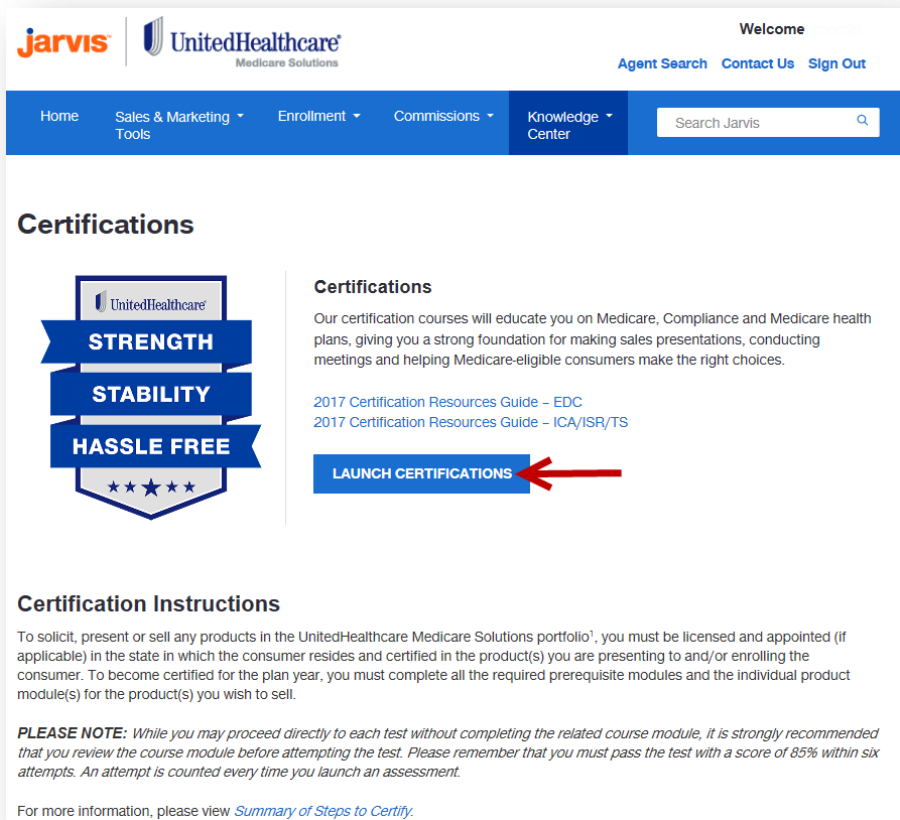
Medicare Solutions Learning Center

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 2018 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 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" is added to the Compatibility View Settings popup box
- If using IE, confirm you are using Internet Explorer 8 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. – 8 p.m., CST).

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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.

A summary of the steps to certify is as follows:

You must complete, in order, the following **prerequisite tests (course modules are optional)** and pass the corresponding assessment with a score of 85% or higher within six attempts.

Navigation Panel

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

- Welcome!
- Certifications
- Electives
- Invitation-Only
- Evaluations

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.

If you have questions regarding how to complete the following modules/assessments, or if you have questions regarding computer technical requirements, please refer to the 2018 Certification Resource Guide found on *Jarvis* via the following path:
Knowledge Center > Certifications > Launch Certifications

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.

You may also contact the Producer Help Desk (PHD) at phd@uhc.com, or call 888-381-8581. **Please do NOT contact HRdirect.**

2018	2017	2016	2015	2014	2013	2012	2011	2010	2009

2018 AHIP (EDC Only)

	Status	Date Completed
2018 AHIP (EDC Only)	—	

EDC Agents choosing to certify via AHIP, click link above FIRST!
If you do NOT want to certify via AHIP, please proceed to the 2018 Prerequisites.

2018 Prerequisites (including Medicare Advantage and Prescription Drug Plans)

	Status	Date Completed	
2018 Medicare Basics (including Medicare Advantage and Prescription Drug Plans)	✓	05/22/2017	
2018 Medicare Basics (including Medicare Advantage and Prescription Drug Plans) Test	✓	05/22/2017	06/06/2017
2018 Ethics and Compliance	✓	06/06/2017	
2018 Ethics and Compliance Test	✓	06/06/2017	
2018 AARP Course	✓	05/31/2017	

2018 AARP Medicare Supplement Plans Certification

	Status	Date Completed	
2018 AARP Medicare Supplement Plans	✓	05/23/2017	
2018 AARP Medicare Supplement Plans Test	✓	05/25/2017	05/25/2017

Certification Tests – Telesales Only

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

TELESALES PRODUCERS ONLY - 2018 Telesales Fundamentals (PSA, PDP EE, Group, C&S)

	Status	Date Completed
2018 Medicare Basics Assessment - TS	✓	05/31/2017
2018 Ethics and Compliance Assessment - TS	—	
2018 AARP Course - TS	—	

TELESALES PRODUCERS ONLY - 2018 Medicare Advantage (PSA, Group)

	Status	Date Completed	
2018 Medicare Advantage Assessment - TS	✓	05/31/2017	05/31/2017

TELESALES PRODUCERS ONLY - 2018 Part D (PSA, PDP EE, Group, C&S)

	Status	Date Completed
2018 Medicare Part D Assessment - TS	—	

TELESALES PRODUCERS ONLY - 2018 Special Needs Plans (PSA & Group Existing)

	Status	Date Completed	
2018 Chronic Condition and Dual Special Needs Plans Assessment - TS	✓	05/25/2017	05/25/2017

TELESALES PRODUCERS ONLY - 2018 AARP Medicare Supplement (Group)

	Status	Date Completed
2018 AARP Medicare Supplement Plans Assessment - TS	—	

Elective Modules/Tests

There are additional modules available for your further education. These are not required but are recommended to further your education. While not required they are highly recommended. They are listed in the **Electives** section.

2018 EDC Electives	Status	Date Completed
2018 Selling at Retail Kiosks	—	
2018 Open Enrollment Agent Meeting Process	—	
2018 UnitedHealthcare Retiree Solutions Overview	—	
2018 Connector Model: An Overview	—	

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.

Invitation-Only Online Courses	Status	Date Completed
Operational Issues v3	—	
Operational Issues Test v3	—	
Risks to Consumers and/or Organization v3	—	
Risks to Consumers and/or Organization Test v3	—	
Lead and Contact Issues v3	—	
Lead and Contact Issues Test v3	—	

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 *Print* 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.

Congratulations!

has completed the requirements to be certified to sell
2018 Prerequisites (Including Medicare Advantage and Prescription Drug Plans)
for the 2018 selling season

Party ID
Date of Certification 06/06/2017
Confirmation # 145095225

UnitedHealthcare
Healing health care. Together.

Certified

Printing

To **print** a copy of your certificate, click on the icon.

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.

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- 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" is added to the Compatibility View Settings popup box

- If using IE, confirm you are using Internet Explorer 8 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):

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