Together for growth

New Agent Start Guide

The tools you need to start building a strong business

United Healthcare®

Get started

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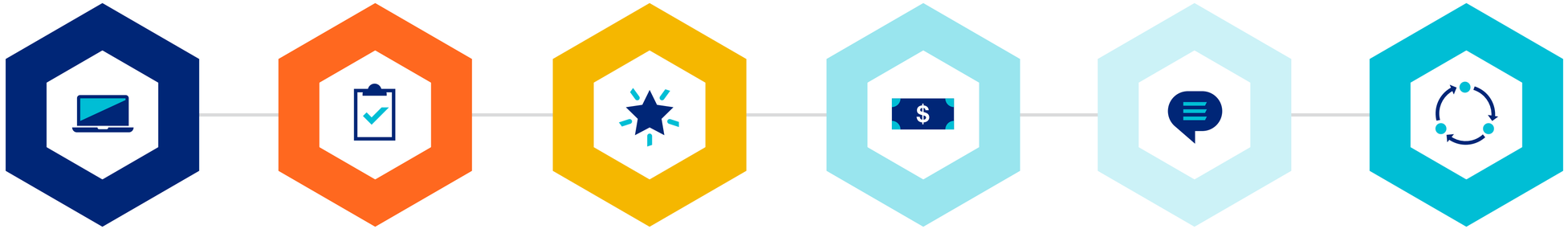
Welcome to UnitedHealthcare

Your clients and members aren't alone on their Medicare journey and neither are you. Count on UnitedHealthcare, the nation's most chosen Medicare Advantage[1] and Medicare Supplement[2] insurer to help you succeed. From tools that make it easier to manage your business, to resources that help you sell and earn commissions, **this guide is designed to help you on your path to success.**



Jarvis | **Training** | **Resources and recognition** | **First sale and commissions** | **Producer Help Desk (PHD)** | **Ready to sell**

[1] Most chosen based on total plan enrollment from CMS Enrollment Data, May 2023

[2] CMS enrollment data, March 2024

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Jarvis, your one-stop shop

Head to Jarvis, the go-to resource for running your business, from learning to selling and everything in between. Jarvis is where you can manage your book of business and access educational and training materials. It's also your gateway to the **Sales Materials Portal,** the **UHC Agent Toolkit,** your **Agent Guide** and more.

Most popular tools on Jarvis

Selling

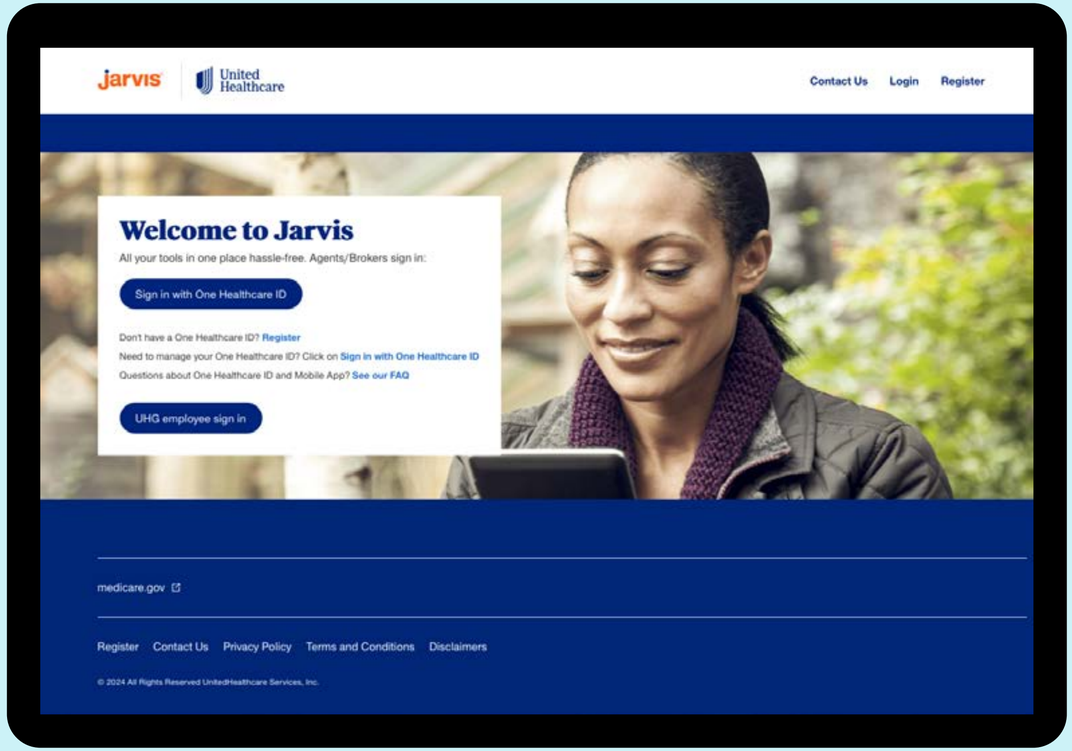
- JarvisEnroll
- Eligibility Lookup
- Provider Lookup

Managing business

- Book of Business
- Member Profile
- Application Status

Learning

- Learning Lab
- Agent News
- Knowledge Center



Log in to Jarvis

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Jarvis tools for the sales process

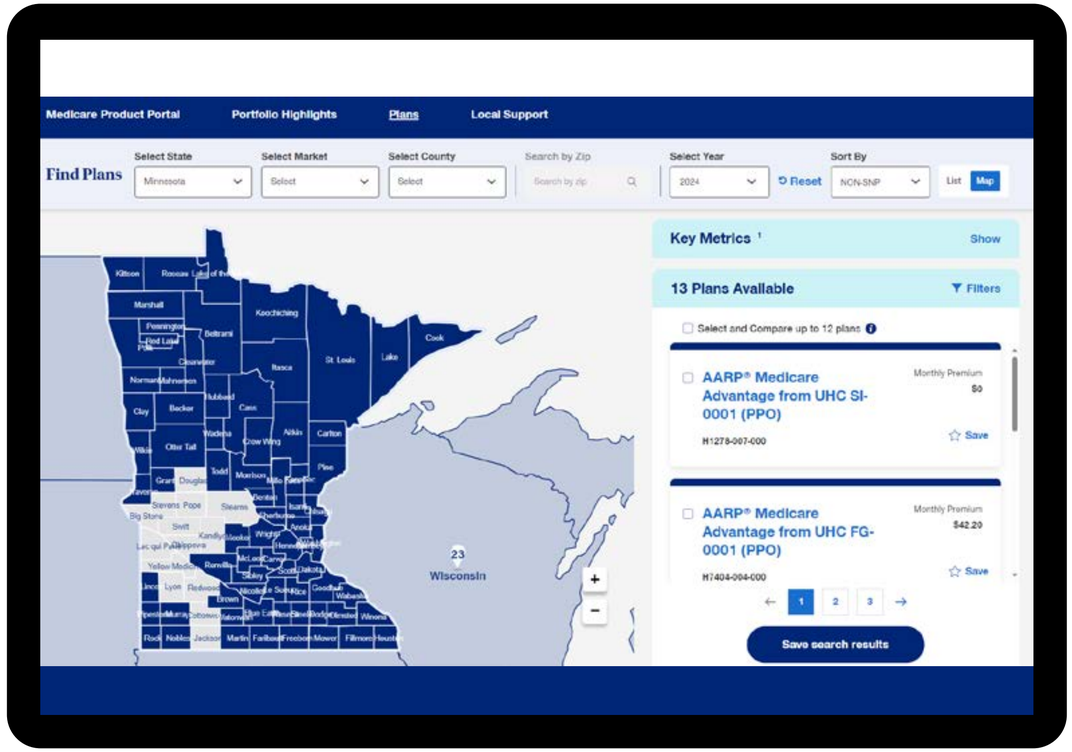
Step 1: Learn about plans in your area

The **Medicare Product Portal** is your resource for all UnitedHealthcare Medicare Advantage plan information. With just a click, everything you need is at your fingertips. You can easily search plans by market to view and compare benefits and plan details or save them to your profile for quick reference later. Within the Medicare Product Portal, you can also search for your local UnitedHealthcare leaders who are available for support.

The Medicare Product Portal is located in **Jarvis**, click **Knowledge Center** > **Medicare Product Portal**.

For Medicare Supplement plan information, visit **Jarvis**, click **Sales Tools** > **Plan Search**.

Log in to Jarvis



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Jarvis tools for the sales process

Step 2: Customize your marketing materials

The **UHC Agent Toolkit** provides marketing materials that can be customized with your contact info, plan details and more. These materials help grow your business while complying with the Centers for Medicare & Medicaid Services requirements and other applicable federal and state requirements. Materials include the Clarity Guide, postcards, flyers, banners, social media posts and more.

To get started, log in to **Jarvis**, click **Sales Tools** > **Sales Materials** > **UHC Agent Toolkit**.

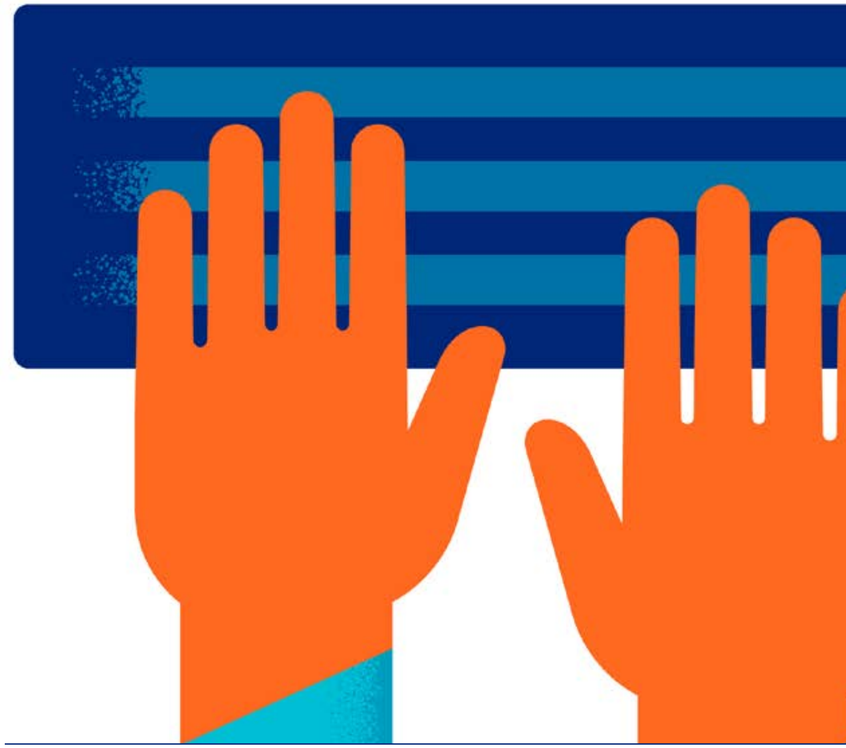
Log in to Jarvis

Step 3: Find sales materials

The **Sales Materials Portal**, accessible via **Jarvis**, makes it simple to order or download sales materials, including enrollment guides and kits, benefit highlight brochures, drug formularies, evidence of coverage documents and more.

Reminder! For Medicare Supplement plans, don't forget to download a state-specific Producer Handbook for states you are licensed and appointed to sell in.

To download digital files or order printed materials, log in to **Jarvis**, click **Sales Tools** > **Sales Materials** > **Order Materials** and use the filters to narrow your selection.



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Jarvis tools for the sales process

Step 4: Enroll a client

UnitedHealthcare JarvisEnroll is the electronic enrollment tool for all UnitedHealthcare Medicare plans. Enrolling your clients electronically helps avoid clerical errors from paper applications and expedites the turnaround process. After confirming a prospect's eligibility and making sure that their provider participates in the Medicare Advantage plan, if applicable, use JarvisEnroll for the following:

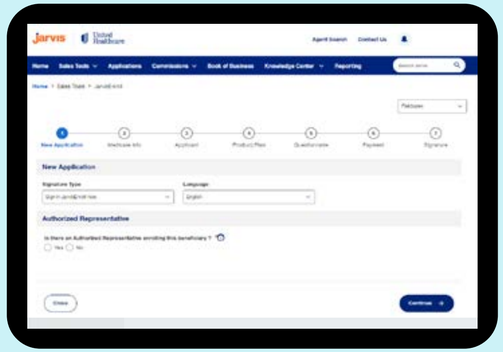
Medicare Advantage plans

- Application Signatures: In-person, email, text or voice
- Scope of Appointment
- Health Assessment (for Special Needs Plans only)

Medicare Supplement plans

- Application Signatures: Express Security Code, Electronic Touch and Remote
- Detailed quoting abilities (including discounts)
- Real-Time Underwriting
- UnitedHealthcare® Dental, Vision, Hearing Plans in applicable states

How to access JarvisEnroll



1. **Log in to Jarvis**
2. For Medicare Advantage, click **Sales Tools > JarvisEnroll**

   For Medicare Supplement, click **Sales Tools > Medicare Supplement JarvisEnroll**

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Complete your New Agent Training Program

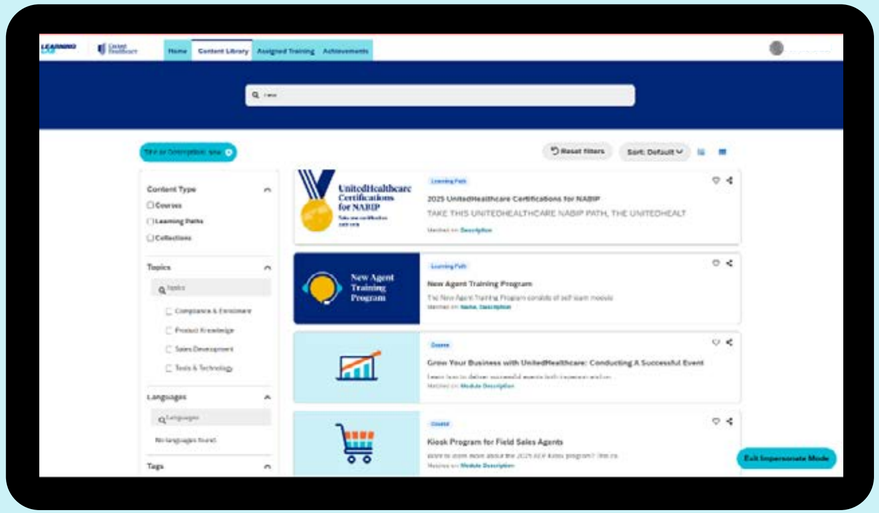
The **New Agent Training Program** consists of self-study materials and national webinars with our knowledgeable trainers. This on-demand program features key topics to help you learn about UnitedHealthcare and our Medicare plans. The program is designed to help you learn at your own pace and is organized into three prioritized and cumulative phases.

The New Agent Training Program is in **Learning Lab,** where you can access training and certifications throughout your time at UnitedHealthcare. The calendar of national webinars can be found on **Jarvis** > **Knowledge Center** > **Agent Training** > **National Webinar Schedule**. Some courses include:

- New Agent Orientation
- 60 Minutes to Success
- The Value of UnitedHealthcare
- Creating Your Retention Strategy
- JarvisEnroll
- D-SNP

Tip | We recommend setting aside 30 minutes a day for training that will help you grow your business!

How to access the program



1. **Log in to Jarvis**
2. Click **Knowledge Center > Ready to Sell > New Agent Resources > New Agent Training Program**

Note: In Learning Lab, if you do not see this learning path, click **Content Library** and search “New Agent Training Program.”

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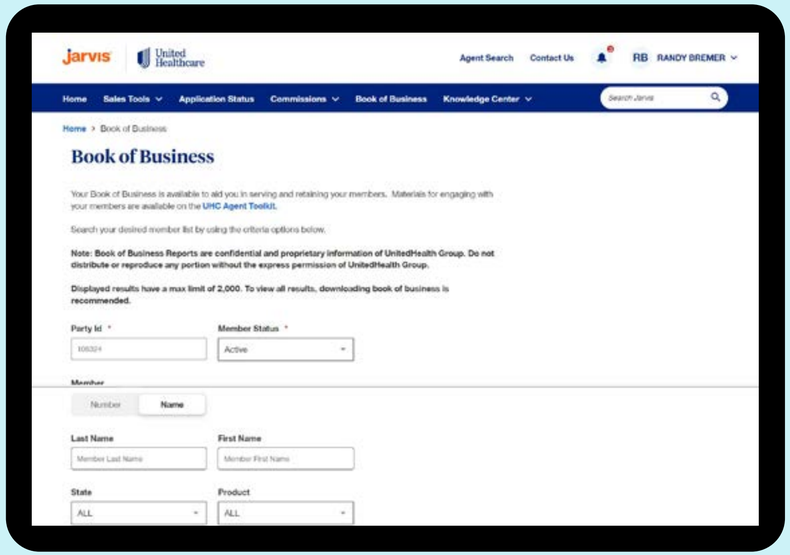
Resources to manage your business

Your **Book of Business (BoB)** gives you convenient access to member information to support retention efforts, outreach, marketing and business planning. BoB is accessed through Jarvis and can show up to 2,000 records on screen, search for specific members and export a detailed spreadsheet report of all members*.

Business development tools

Our **Business Plan Template** and **Grassroots Marketing Workbook** are designed to help you set your goals, generate leads, identify resources and opportunities, navigate roadblocks and maintain a strong presence in the community. Take advantage of these materials in **Jarvis** > **Knowledge Center** > **Learning Lab** > **Grow Your Business with UnitedHealthcare: Grassroots Marketing** (search keyword “grassroots” in the Content Library).

How to access your Book of Business



1. **Log in to Jarvis**
2. Click **Book of Business**

*Jarvis BoB reports are confidential and proprietary information of UnitedHealth Group.

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Ready, set, AEP

Your path to success starts here

Whether you're navigating your very first Annual Enrollment Period (AEP) or bringing your experience to UnitedHealthcare®, we've got you covered. With the support, comprehensive resources and training offered, you can confidently prepare for success.

Each year, AEP occurs from October 15 to December 7, providing an ideal opportunity to connect with consumers looking to enroll in or modify their Medicare coverage.

The UnitedHealthcare portfolio, including Medicare Advantage, Medicare Supplement and Prescription Drug plans, offers plans designed to fit a variety of needs. As you check in with existing clients or connect with new ones, AEP is a great time to:

- Perform plan reviews with current clients to help determine if their plan is still meeting their healthcare needs
- Assist new or current clients with enrollment in or changing their Medicare Advantage or Prescription Drug plans
- Check-in with your Medicare Supplement clients; if they're satisfied, no annual re-enrollment is required. As a reminder, you can assist clients with Medicare Supplement plan enrollments during AEP or any time of year.

Get prepared with the resources you need by visiting the AEP Resource page on Jarvis to find:

- Medicare Product Portal
- Medicare Supplement Plans-at-a-Glance
- AEP Agent Playbook
- AEP Checklist
- Quick Reference Guides
- And more!

Go to AEP Resource Page

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Recognition

Premier Producer

The **Premier Producer** program rewards the top UnitedHealthcare Medicare sales agents with a premium experience. Premier Producers earn priority access to PHD, credit for the UHC Agent Toolkit, branded swag and more. For more information about the Premier Producer program, go to **Jarvis** > **Knowledge Center** > **Ready to Sell** > **Premier Producer**.

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Prepare for your first client meeting

All that preparation through available materials and trainings, leads up to the sale!
Additional tips for a successful enrollment:

- **Get acquainted and build rapport** with your client
- **Be thorough in your needs assessment,** including reviewing and confirming plan type, network providers and drug coverage, if applicable
- **Set cost expectations and review key details** about premiums, copays and drug costs
- **Explain the full value of the plan,** including any additional benefits or wellness extras

Please note, for Medicare Advantage and Prescription Drug Plans, a Scope of Appointment (SOA) must be obtained at least 48 hours prior to your scheduled appointment unless an exception applies. Please refer to the Agent Guide for additional information on SOA requirements.

Tip

Stay in touch with your clients year-round while supporting your efforts to get sought-after referrals! Thank them for their business, invite them to contact you with questions and encourage them to pass along your name to others who may be seeking help with their insurance needs.

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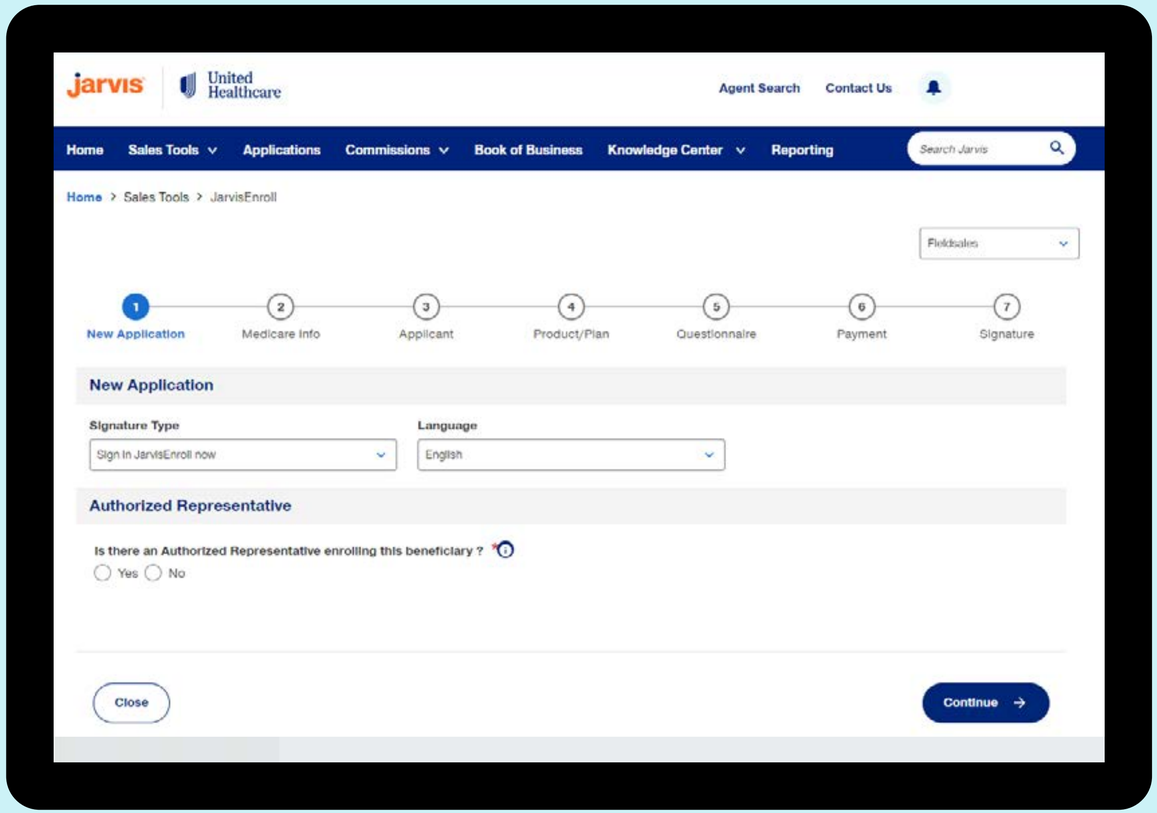
Complete the enrollment



You've helped your client choose a plan and they're ready to enroll with confidence. Now complete their enrollment in JarvisEnroll.

1. **Log in to Jarvis**
2. Click **Sales Tools** > **JarvisEnroll** and complete and submit the application
3. Complete the **Health Assessment** for Dual Special Needs Plan and Chronic Special Needs Plan members
4. Help members download the **UnitedHealthcare mobile app** where they can track their application status and access their plan information. Eligible members can view their UnitedHealthcare UCard® or member ID, see available OTC credit and rewards balances, find shopping tools and more.

UnitedHealthcare mobile app

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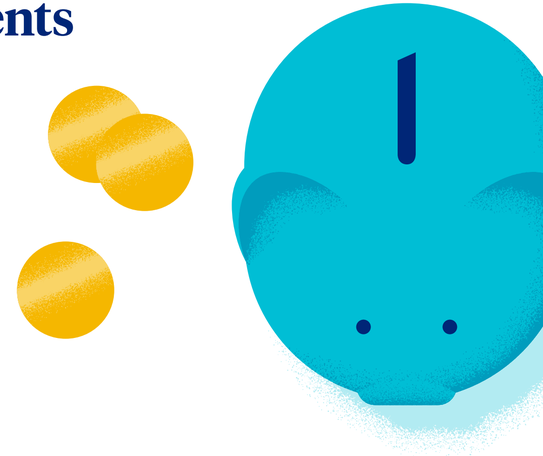
Maximize earning potential

Whether this is a full-time career, part-time job or extra source of income, UnitedHealthcare is here to provide the support you need to reach your goals. As a Medicare sales agent, you'll earn commission for eligible, new Medicare Advantage (MA) enrollments, as well as when MA members re-enroll with UnitedHealthcare. For AARP Medicare Supplement Plans, you can choose to receive new and renewal commissions monthly, as earned, or in advance.

How to access commission statements

1. **Log in to Jarvis**
2. Click **Commissions** > **Statements and More**



Tip

Enabling direct deposit will speed up your commission payments. You can do so by logging in to **Jarvis**, clicking your username, selecting "Manage Profile" and entering your direct deposit information.

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The Producer Help Desk is ready to help

Questions on commissions? Need product information? Looking to verify Medicaid eligibility? **When you can't find the answer or need additional support, look to the Producer Help Desk (PHD).** The PHD is a team of sales support professionals who are up to date on the latest Medicare-related information and happenings around UnitedHealthcare, including:

- **Contracting –** status updates, up-line identification, state appointments and licensing
- **Certifications –** required courses, troubleshooting, software compatibility questions and transferring AHIP or NABIP credit
- **Commissions –** inquiries related to statements, status of payment, agent of record, true-ups and renewals
- **Pre-Enrollment –** application status checks and updates to pending applications
- **Product Information –** information related to coverage
- **Medicare/Medicaid Verification –** Confirm Part A/B, MBI and/or Dual Special Needs Plan eligibility

Two easy ways to connect:

English: 1-888-381-8581
Español: Presione la opcion 2

Live Chat via Jarvis

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New agent checklist

To help you get off to a strong start, we recommend completing these simple steps first:

- [ ] **Log in to Jarvis** and familiarize yourself with key features and tools, including:
  - **Medicare & Medicaid Eligibility Tool**
  - **JarvisEnroll**
  - **Application Status**
  - **Notification Center**
- [ ] **Enable direct deposit** by clicking your username in the upper right-hand corner of Jarvis and selecting "Manage Profile"
- [ ] **Check out the Book of Business tool**, which gives you access to member information to support business planning, member escalations, plan changes and so much more
- [ ] **Register for National Webinars**, such as "New Agent Orientation," or Local Trainings tailored to your market
- [ ] **Visit Learning Lab** to start taking on-demand trainings
- [ ] **Browse the Medicare Product Portal** to learn about plans in your market and see your local UnitedHealthcare leadership
- [ ] **Visit the Sales Materials Portal** to order Enrollment Guides and other sales materials
- [ ] **Go to the UHC Agent Toolkit** to order personalized marketing materials like business cards, banners, postcards, flyers and more
- [ ] **View the Contact Us page** to learn how to contact the Producer Help Desk

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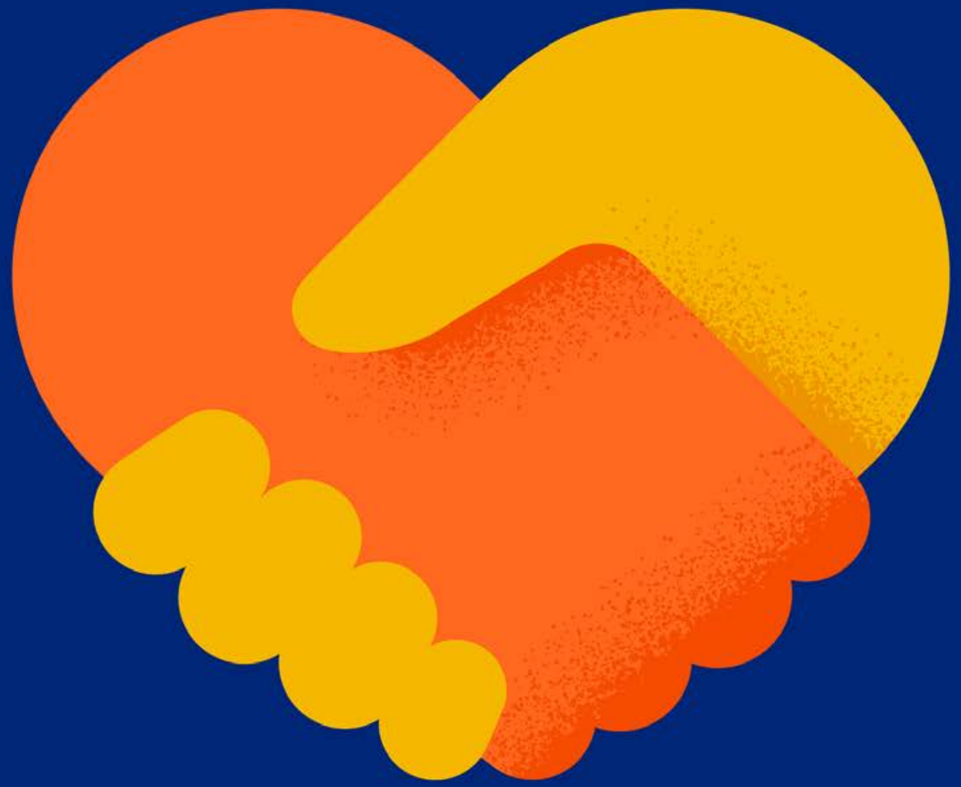
Let's grow your business together

As you begin your career as a UnitedHealthcare Medicare sales agent, keep this guide as reference – and a reminder of all the tools and support you have at your disposal.

- Medicare Product Portal
- UHC Agent Toolkit
- Sales Materials Portal
- JarvisEnroll
- New Agent Training Program
- Learning Lab
- Book of Business
- Producer Help Desk (PHD)
- Your local UnitedHealthcare growth leader



Welcome to the team.

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