



2025 Certification User Guide

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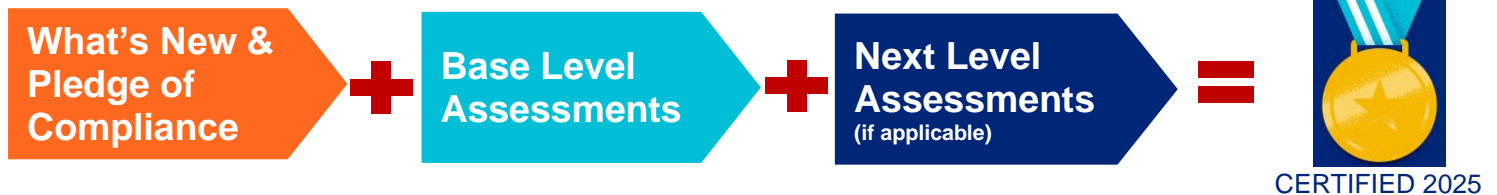
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2025 Annual Certification Requirements

UnitedHealthcare Certification Requirements

To solicit, present or sell any products in the UnitedHealthcare® Medicare products (may include plans branded UnitedHealthcare, AARP, Erickson, Peoples Health, Preferred Care Networks, Preferred Care Partners, or Rocky Mountain Healthcare), you must be **licensed** and **appointed** (as required by the state) 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 successfully pass all the Base Level assessments and the Next Level assessments for the product(s) you wish to sell or events you wish to conduct.

NOTE: While you may proceed directly to each assessment without reviewing the certification content, it is strongly recommended that you review the *Certification Study Guide* before attempting the assessment.



Review any needed **RECOMMENDED COURSES**, including the **STUDY GUIDE** which contains the content needed to pass the assessments.

- Review the **WHAT'S NEW** document.
- Complete the **PLEDGE OF COMPLIANCE**.
- Complete all **BASE LEVEL ASSESSMENTS** by passing with a score of **85% or higher within 6 attempts (70% for AARP)**.
 - Failing any Base Level assessment will block access to any other assessments, and you will not be able to market or sell any UnitedHealthcare Medicare plans for the plan year.
 - Base Level assessments must be taken in order:
 - Medicare Basics
 - Ethics and Compliance
 - AARP
- Complete the **NEXT LEVEL MODULES and/or ASSESSMENTS**:
 - Next Level assessments (require passing at **85% or higher within 6 attempts**):
 - Dual Eligible and Chronic Condition Special Needs Plans (D-SNP/C-SNP)
 - Institutional and Institutional-Equivalent Special Needs Plans (I-SNP/IE-SNP)*
 - Senior Care Options*
 - Next Level Module (no assessment):
 - Events Basics (required for conducting any marketing/sales events)

**Available by invitation only. These will only appear on your Home Page in Learning Lab if you have been invited to sell these products.*

AHIP or NABIP Certification for our EDC Partners

America's Health Insurance Plan (AHIP) or National Association of Benefits and Insurance Professionals (NABIP) Certification satisfies the requirement for the following UnitedHealthcare Certification assessment: Medicare Basics Assessment (including Medicare Advantage [non-SNP], Prescription Drug and Medicare Supplement Plans). See *instructions provided in this guide*.

A summary of the steps to certify is as follows:

Step 1: Review any *recommended* courses needed such as the STUDY GUIDE

Step 2: Complete the *required* WHAT'S NEW and PLEDGE OF COMPLIANCE documents

Step 3: Complete all 3 REQUIRED Base Level Assessments

Step 4: Complete any Next Level Modules and/or Assessments



All agents must first agree to the Pledge of Compliance before taking any assessments.

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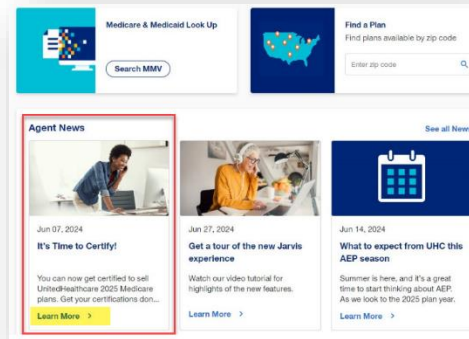
**United
Healthcare®**

Certification Instructions

1

From Jarvis, click on the link in the **Agent News** tile near the top of the page.

Spanish is also available once you enter the Learning Lab path.



From the Agent News article, select the **Launch Learning Lab** button to take UnitedHealthcare certifications. (See below for AHIP and NABIP instructions.)

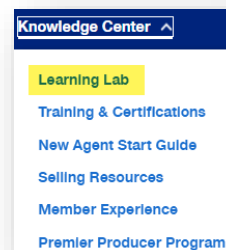
*Note for Field Sales agents: Before you begin your certifications, decide if you are taking your certifications entirely via UnitedHealthcare modules **OR** if you will be using a combination of AHIP or NABIP and UnitedHealthcare courses.*



Then select the learning path you need to complete (only complete one path).



Note: If you don't see the article on Jarvis, go to the **Knowledge Center** tab on the top bar. Then click on **Learning Lab**. That will open Learning Lab and you can search for 2025 Certifications.



2

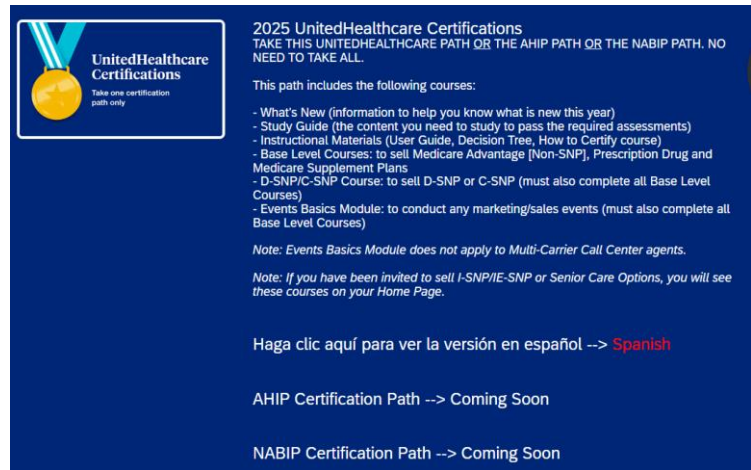
When the path opens in Learning Lab, you will see a description and some instructions.

You will also find the links to Spanish, AHIP and NABIP. Select any of those options if you prefer and follow the instructions below.

If you select a link but decide that you would prefer to take the English version or non-AHIP/non-NABIP version of UnitedHealthcare Certifications, click the back button or exit and follow the instructions below.

Below the description, you will first see the **Study Guide** which has the content you need to know to pass the assessments. Then you'll see some **RECOMMENDED** courses. These are optional but highly recommended.

NOTE! The Study Guide is also available from the Home Page in the 2025 Certification Study Guide tab for easy access all year long as a reference.



2025 UnitedHealthcare Certifications
TAKE THIS UNITEDHEALTHCARE PATH OR THE AHIP PATH OR THE NABIP PATH. NO NEED TO TAKE ALL.

This path includes the following courses:

- What's New (information to help you know what is new this year)
- Study Guide (the content you need to study to pass the required assessments)
- Instructional Materials (User Guide, Decision Tree, How to Certify course)
- Base Level Courses: to sell Medicare Advantage [Non-SNP], Prescription Drug and Medicare Supplement Plans
- D-SNP/C-SNP Course: to sell D-SNP or C-SNP (must also complete all Base Level Courses)
- Events Basics Module: to conduct any marketing/sales events (must also complete all Base Level Courses)

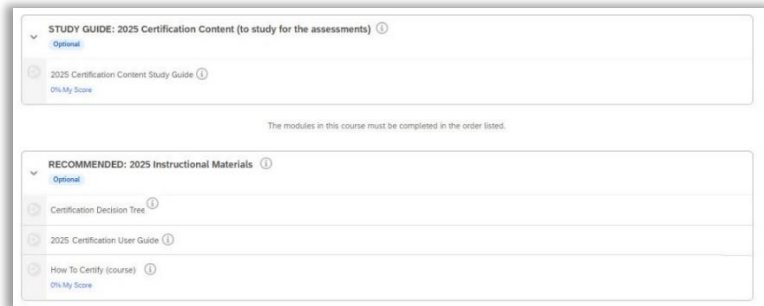
Note: Events Basics Module does not apply to Multi-Carrier Call Center agents.

Note: If you have been invited to sell I-SNP/IE-SNP or Senior Care Options, you will see these courses on your Home Page.

Haga clic aquí para ver la versión en español --> [Spanish](#)

AHIP Certification Path --> Coming Soon

NABIP Certification Path --> Coming Soon



STUDY GUIDE: 2025 Certification Content (to study for the assessments)

Optional

- 2025 Certification Content Study Guide (1)

0% My Score

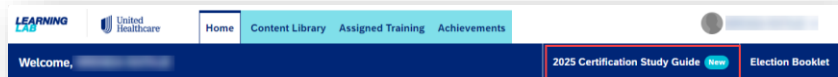
The modules in this course must be completed in the order listed.

RECOMMENDED: 2025 Instructional Materials

Optional

- Certification Decision Tree (1)
- 2025 Certification User Guide (1)
- How To Certify (course) (1)

0% My Score



LEARNING LAB UnitedHealthcare Home Content Library Assigned Training Achievements

Welcome, [Name] 2025 Certification Study Guide **New** Election Booklet

3

Complete all the REQUIRED courses:

- What's New document
- Pledge of Compliance and
- 3 Base Level Assessments (Medicare Basics, Ethics & Compliance, and AARP).

Six attempts* are allowed on each assessment.

Reviewing the What's New document, completing the Pledge of Compliance and successfully passing all 3 base level assessments with 85% or higher passing score (70% for AARP) will certify you to sell Medicare Advantage (non-SNP) Plans, Prescription Drug Plans, Medicare Supplement Plans, and Standalone Dental, Vision and Hearing Plans.

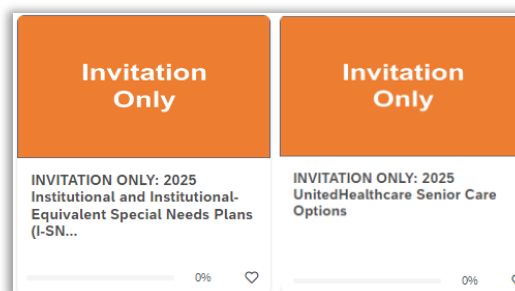
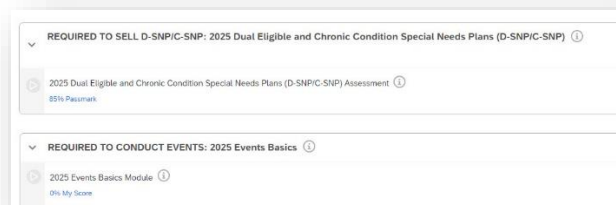
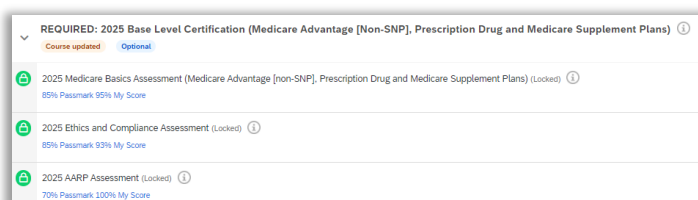
**An attempt is counted when you complete the assessment or if you restart a previous attempt.*

4

Complete any Next Level assessments if you wish to certify to sell more than the base level.

For example, if you want to sell D-SNP and/or C-SNP, complete that assessment; if you want to conduct any marketing events, complete the Events Basics module.

If you have been invited to sell any other products, those assessments will appear on your Home Page in a separate course.



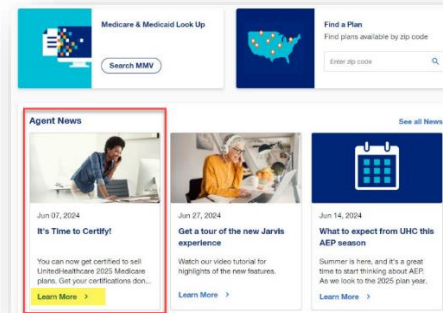
AHIP Certification Instructions

We are pleased to once again accept the AHIP Medicare + Fraud, Waste and Abuse Training from American's Health Insurance Plans. Agents choosing to pursue AHIP via UnitedHealthcare are eligible to receive a \$50 discount by using our custom link in Learning Lab.

Per policy, agents choosing to certify via AHIP must obtain a minimum score of 90% within six attempts. Each purchase consists of three attempts (UnitedHealthcare only acknowledges the initial two purchases).

All agents are required to review the **What's New** document and sign the **Pledge of Compliance**. Agents certifying via the AHIP path must transfer a passing AHIP score (via our custom link) and then complete the remaining **Base Level** certification assessments: Ethics & Compliance and AARP. Passing all three will certify you to sell MA (non-SNP) Plans, Prescription Drug Plans (PDP), Medicare Supplement Plans, and Standalone Dental, Vision and Hearing Plans. *(AHIP Certification satisfies the requirement for the UnitedHealthcare Medicare Basics Assessment.)*

From Jarvis, click on the link in the **Agent News** tile near the top of the page.



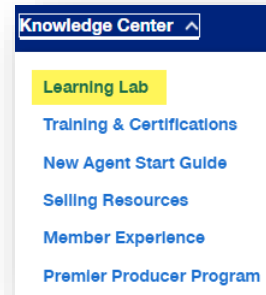
From the Agent News article, select the **AHIP Certification** button.



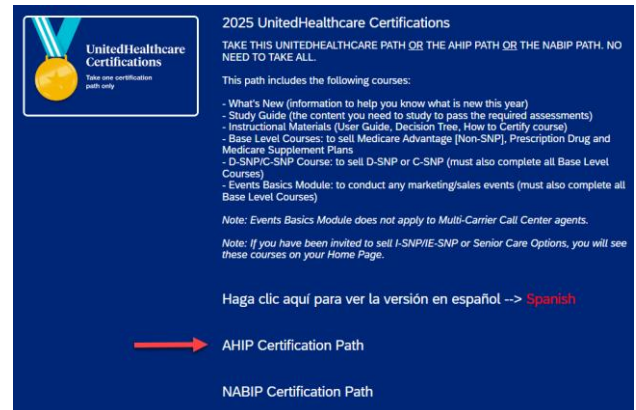
The AHIP Certification learning path will open.



Note: If you don't see the article on Jarvis, go to the **Knowledge Center** tab on the top bar. Then click on **Learning Lab**. That will open Learning Lab and you can search for 2025 Certifications.



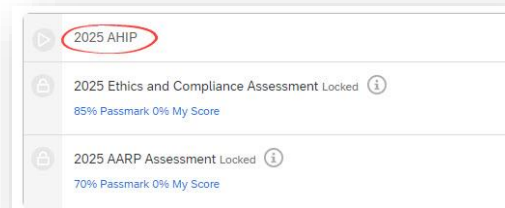
From the standard Certifications, you will be able to select the AHIP learning path link.



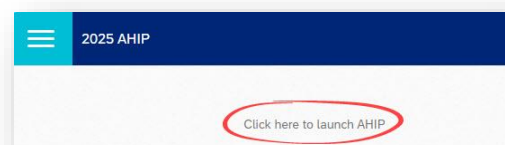
Review the **What's New** and complete the **Pledge of Compliance**.



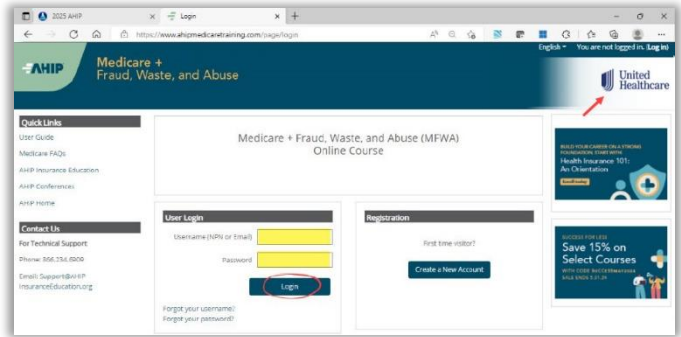
Click on the **2025 AHIP** module.



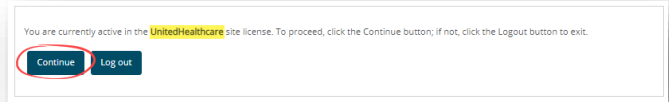
Click on **Click here to launch AHIP**.



A new tab with the AHIP website will open displaying the UnitedHealthcare logo in the upper right corner where you will log in with your **AHIP Username and Password** OR register if you are a new AHIP user.



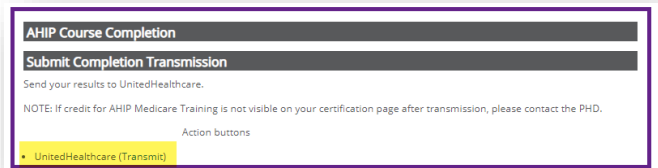
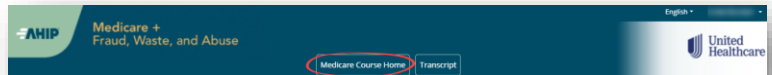
A pop-up message will appear to confirm you are active in the UnitedHealthcare site license, click **Continue**.



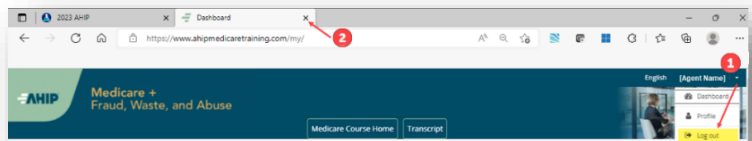
If you require assistance with your AHIP purchase, please refer to the **User Guide** located on the AHIP site.



To send your results to UnitedHealthcare go to the **Medicare Course Home** tab, scroll to the bottom of the screen to click the **UnitedHealthcare (Transmit)** link.



Log out of your AHIP account and close the AHIP tab.

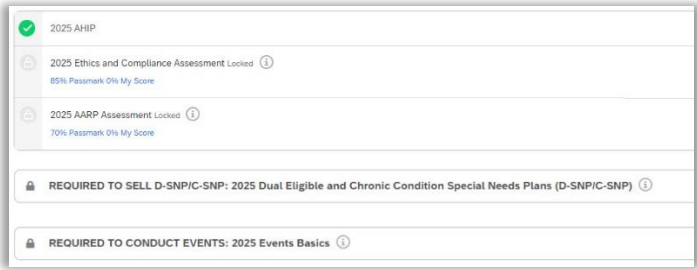


On the Learning Lab tab, click the **EXIT** button to return to the main page where the 2025 AHIP will appear completed upon successful transmission.



A green checkmark will indicate that your AHIP score was transferred to UnitedHealthcare.

Proceed with completing the remaining **REQUIRED Base Level** assessments as well as any **Next Level** assessments if you wish to certify to sell more than the **Base Level**.



REMINDER: For agents choosing to complete the 2025 AHIP, either directly from the AHIP website or through another carrier, you are still required to follow the above directions to transmit your results to UnitedHealthcare and receive credit for the equivalents. The UnitedHealthcare discount will be forfeited if you choose to certify directly from the AHIP website or through another carrier.

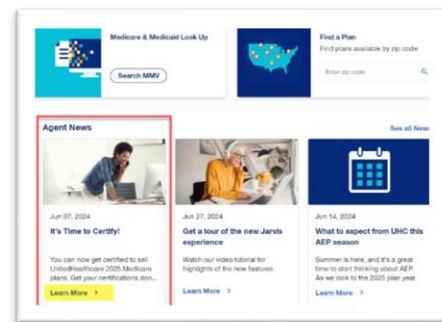
NABIP Certification Instructions

We are pleased to offer another third-party certification program as a way to earn credit for the UnitedHealthcare Medicare Basics Assessment with a passing score from the National Association of Benefits and Insurance Professionals (NABIP).

Per policy, agents choosing to certify via NABIP must obtain a minimum score of 85% within six attempts. Each purchase consists of six attempts.

All agents are required to review the **What's New** document and sign the **Pledge of Compliance**. Agents certifying via the NABIP path must transfer a passing NABIP score (via our custom link) and then complete the remaining **Base Level** certification assessments: Ethics & Compliance and AARP. Passing all three will certify you to sell MA (non-SNP), Prescription Drug Plans (PDP), Medicare Supplement Plans, and Standalone Dental, Vision and Hearing Plans. *(NABIP Certification satisfies the requirement for the UnitedHealthcare Medicare Basics Assessment.)*

From Jarvis, click on the link in the **Agent News** tile near the top of the page.



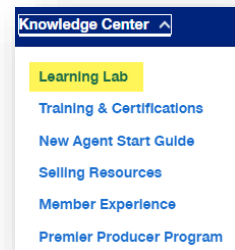
From the Agent News article, select the **NABIP Certification** button.



The NABIP Certification learning path will open.



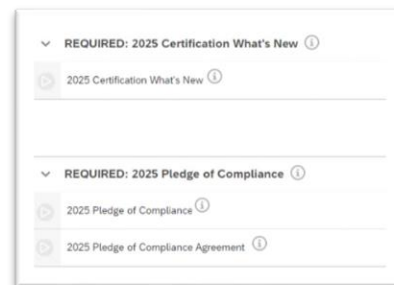
Note: If you don't see the article on Jarvis, go to the [Knowledge Center](#) tab on the top bar. Then click on [Learning Lab](#). That will open Learning Lab and you can search for 2025 Certifications.



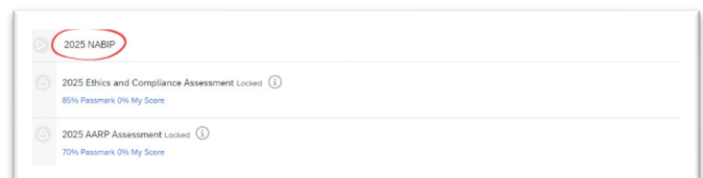
From the standard Certifications, you will be able to select the NABIP learning path link.



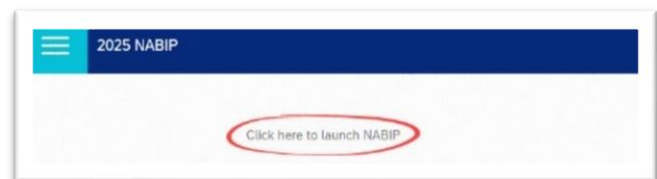
Review the [What's New](#) and complete the [Pledge of Compliance](#).



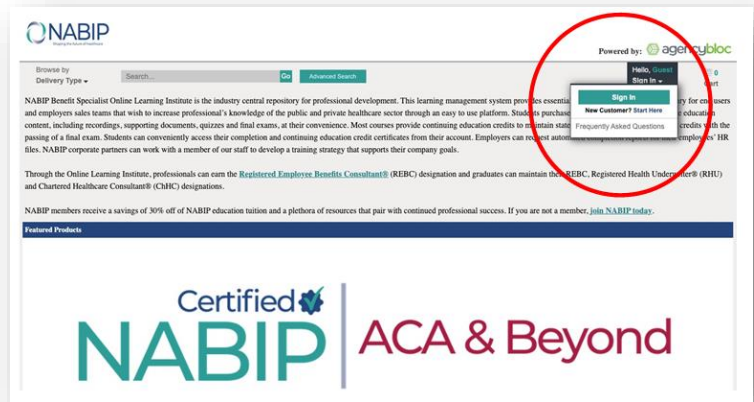
Click on the [2025 NABIP](#) module.



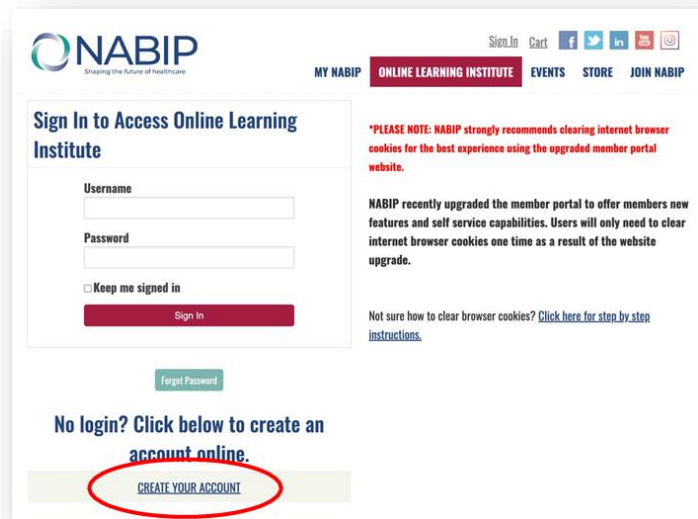
Click on the link [Click here to launch NABIP](#).



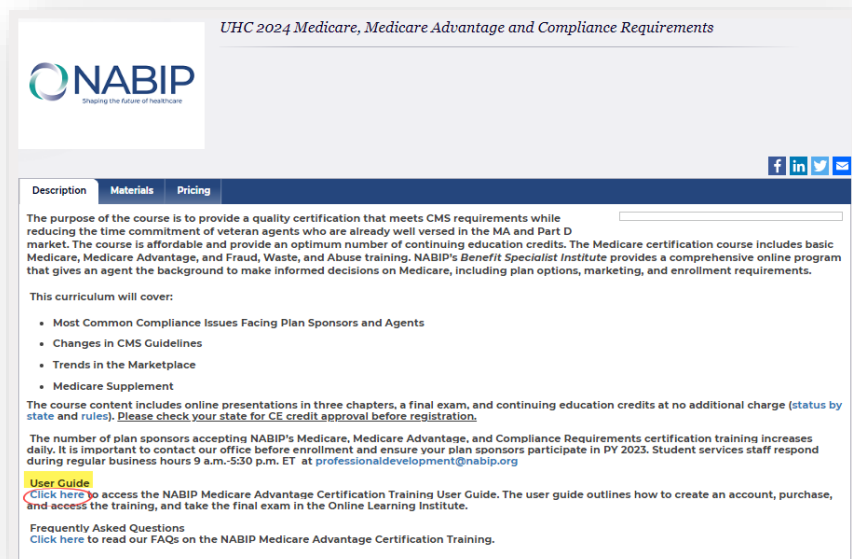
A new tab will open on the NABIP website. In the upper right corner, it will say “Hello, Guest.” Place your cursor on the text for the **Sign In** drop down menu to appear.



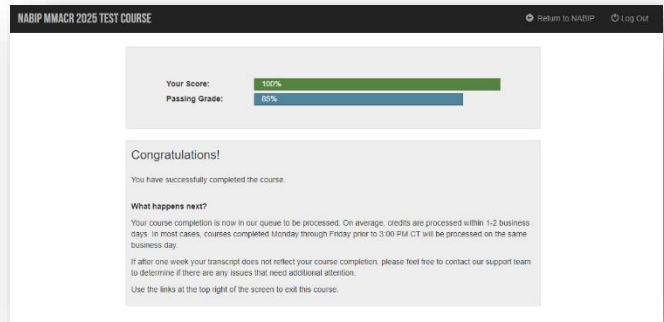
On the **Sign In** page, you can enter your login credentials or create a new account.



If you require assistance with your NABIP purchase, please refer to the **User Guide** located on the NABIP site.



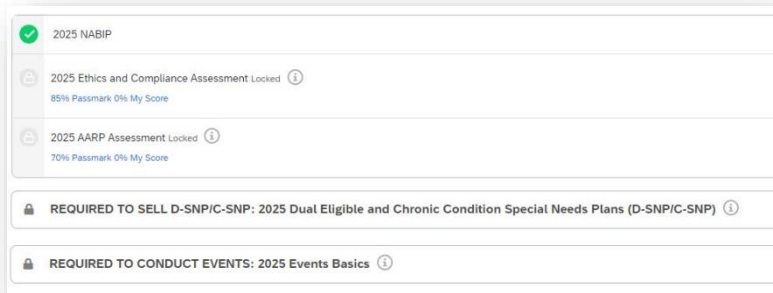
Upon successfully completing the final exam the results will automatically be sent to UnitedHealthcare. **Log out** of your NABIP account and close the NABIP tab.



On the Learning Lab tab, click the **EXIT** button to return to the main page where the 2025 NABIP will appear completed upon successful transmission.



A green checkmark will indicate that your NABIP score was transferred to UnitedHealthcare.



Proceed with completing the remaining **REQUIRED Base Level** assessments as well as any **Next Level** assessments if you wish to certify to sell more than the **Base Level**.

REMINDER: For agents choosing to complete the 2025 NABIP, either directly from the NABIP 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.

Logging into Jarvis

Registered Users

- Go to www.uhcjarvis.com
- Click on [Sign in with One Healthcare ID](#)



- Enter your One Healthcare ID and password
- Click on [Continue](#)

For log in or other assistance with Jarvis, contact the Producer Help Desk (PHD):



Need Help?

Contact the Producer Help Desk (PHD)

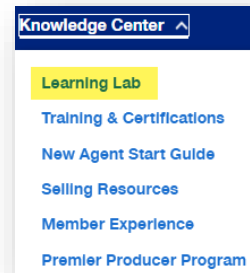
Monday – Friday 7am – 9pm CT

 phd@uhc.com  **888-381-8581**

866-235-5990 (Spanish)

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 and Certifications** option, you will also find a link to Learning Lab.

Training & Certification

Learning Lab

Whether you're a new agent or a seasoned pro, Learning Lab is your one-stop shop for UnitedHealthcare Medicare Plans training and certifications.

- The Medicare industry and the value of UnitedHealthcare to members
- The suite of tools UnitedHealthcare offers to improve the agent experience
- Products and programs for members with a UnitedHealthcare plan
- How to remain compliant while selling UnitedHealthcare
- How to grow your business through industry leading sales skills
- And so much more!

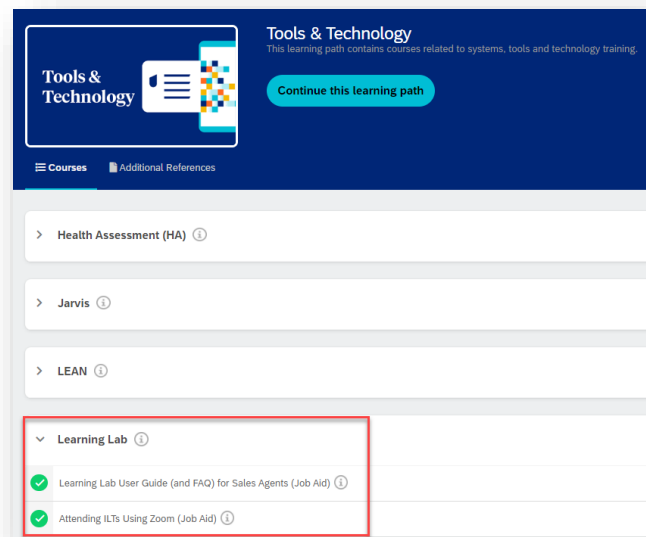
Certification modules, taken during your onboarding and annually after that, provide you with an overview of the Medicare program, an understanding of Medicare insurance options and the rules and regulations that guide your marketing and sales activities.

For more details on the certification process and technical requirements open the Certification User Guide in either [English](#) or [Spanish](#).

Find additional information on the most frequently asked Learning Lab questions

[Launch Learning Lab >](#)

For detailed information on using Learning Lab, please review the Learning Lab User Guide found on Learning Lab. It is located in the Tools and Technology path or search for it in the Content Library tab.

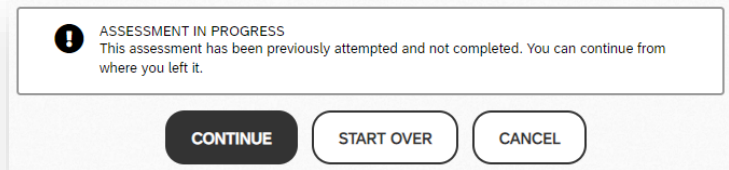


Attempts, Results and Progress

ATTEMPTS

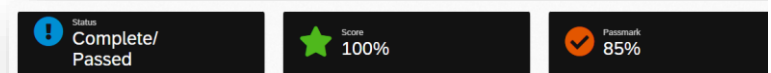
Attempts are counted when you complete an assessment. However, if you exit an assessment early and return to take it again, you will have **two options** which affect attempt counts: **Continue** or **Start Over**.

- Selecting Continue resumes the prior attempt.
- Selecting Start Over begins a new attempt and counts the previous early exit attempt.

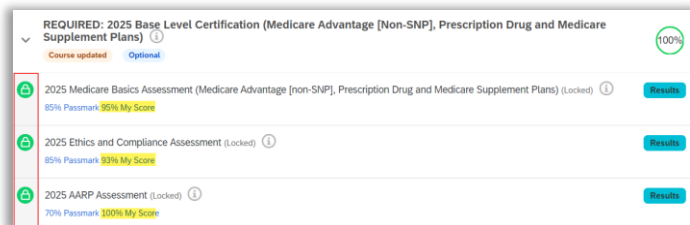


RESULTS

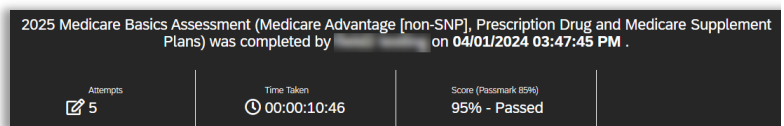
When you complete an assessment (either pass or fail), you will see the results.



Back on the course page, you will also see a status for each module. On the left, a green filled circle means you have completed that assessment. You will also see your score in percentage.



Click on the **Results** button to see the number of attempts used.

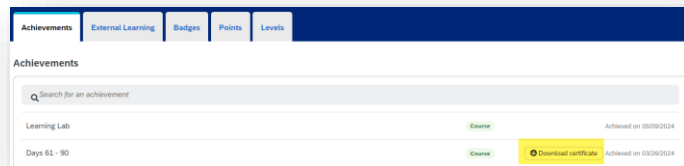
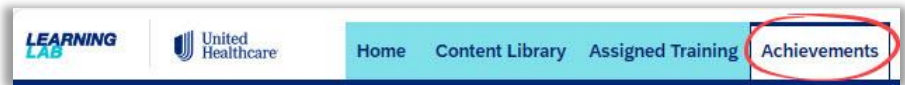


Achievements and Printing Certificates

Note: certificates are available for Base Level, SNPs, and Events Basics assessments.

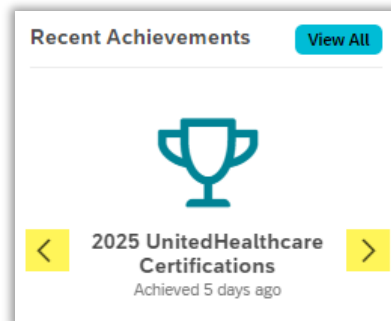
To view a list of your completed courses and modules from the [Home Page](#):

- Click on the [Achievements](#) tab.
- A list of all your achievements will appear with the achievement date.
- Click [Download certificate](#) to obtain a printable copy.
- A PDF of the certificate will appear. Open the PDF and print the certificate.

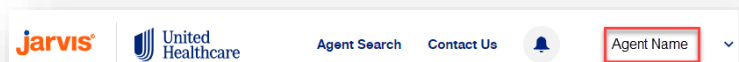


For a quick view of your most recent achievements:

- From the Home page, scroll down to find your recent achievements tile. You can click the forward and back arrows to see the most recent achievements.
- Click on [View All](#) in the [Recent Achievement](#) tile to see all achievements.



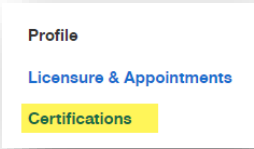
To view a list of your completed certifications on [Jarvis](#), click on your [name](#).



- Click on Manage Profile.



- Click on **Certifications** on the left.



- A list of your current certifications will appear.

Current Certifications		
Year	Certificate Name	Completion Date

Learning Lab System Requirements

For optimized viewing, broadband internet connection is recommended.

Desktop

- Web browser:
 - Microsoft Edge
 - Google Chrome
 - Mozilla Firefox
 - Apple Safari
- JavaScript and cookies enabled

Note: Internet Explorer is not recommended for use with Learning Lab due to compatibility issues.

While not a requirement, Learning Lab is best viewed using a minimum screen resolution of 1024 x 768px.

Mobile Devices

- Apple iOS devices using Safari mobile web browser
- Android devices using Google Chrome mobile web browser



Need Help?

Contact the Producer Help Desk (PHD)

Monday – Friday 7am – 9pm CT

✉ phd@uhc.com ☎ 888-381-8581

866-235-5990 (Spanish)

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