

# Jarvis Book of Business – Individual & Family Plans Member Profile Page

In **Jarvis**, you will be able to support your members through the Member Profile page. You can order a Member Card, view Application and Commission Details, or change the Primary Care Provider (PCP) for a member.

## Accessing the Member Profile Page

Access your Book of Business from the Jarvis homepage by selecting **Book of Business or UHC Members**.

The screenshot shows the Jarvis Book of Business dashboard. At the top, there are logos for Jarvis and United Healthcare, along with navigation links for Agent Search, Contact Us, and a notification bell. Below this is a dark blue navigation bar with the following items: Home, Sales Tools (dropdown), Applications, Commissions (dropdown), **Book of Business** (highlighted with a red box), Knowledge Center (dropdown), and Reporting. The main content area features a welcome message, a user profile for an IFP Agent, and a grid of data cards. The cards include: Pended Applications (0), Approved Applications (0, Last 60 Days), **UHC Members (1911, Active Status)** (highlighted with a red box), Late Payment (0), Turning 26 (8), and Turning 65 (26). On the right side, there is a 'Quick Access' sidebar with sections for Favorites (0), Agent Support (9), Member Onboarding Resources, and Provider Search.

Scroll down to see and filter a list of your members. Or, select **Download Results** to download it. Note: there is a maximum of 500 records that can be displayed, so it is highly recommended that you download your Book of Business to view all results. When you scroll down on the Book of Business homepage, you will see an alphabetical list of your members. Change the **Member Status** to view **Active** or **Inactive** members and click **Display**. You can search by **Member Number**, **Name** and **State**. You can also filter your results by **Plan Code** or **Product**. Select a member's name to access the member's profile information. On this page, you can see current information on the member and view their payment information.

## CUSTOMER NAME

Plan  Plan Code

Plan Status Desp Active	Date Of Birth <input type="text"/>	Member Number <input type="text"/>	Agent Of Record <input type="text"/>
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[Member Information](#) [Application Details](#) [Commission Details](#)

### Quick Links

- [Member ID Card](#)
- [Change Provider](#)
- [Submit Member Escalation Form](#)
- [Member Escalation Status](#)

### Contact Information

Primary Phone Number:  Secondary Phone Number:  Email:

Permanent Address:  Mailing Address:  Authorized Representative:

### Premium Status

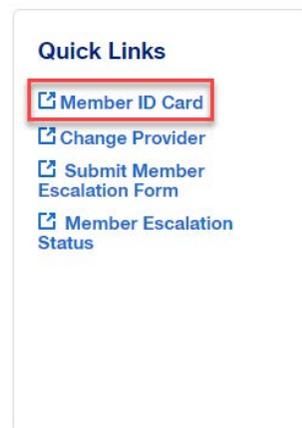
Premium Amount:

Payment Method:

Past Due Amount:

## View Member Card

- From Quick Links, click **View Member Card**.
- You can download the Member ID Card by **hovering over the image and right-clicking** to open and send the image to your member.



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- To have a new Member ID mailed directly to your member, click **Submit Order**. The new ID card will be sent to the address listed under the Contact Information section on the previous page.

## Member ID Card

**Medical Plan:** **Member ID:**

**Members:**  
Customer Name  
Date of Birth:

### View ID Card

**Front**

**Back**

**Note:** This is not a substitute for your member ID card (health insurance card). However, it provides information that can help you use your health insurance. To request a new card be mailed to you, select Submit Order. For help with other questions, please contact us.

### Order ID Card

#### Shipping Address

The materials will be sent to the permanent address on file. If you have questions or would like an item sent to a different address, please contact us.

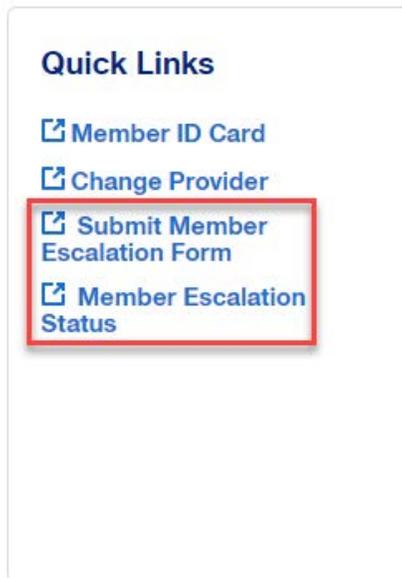
If this member's plan includes a Primary Care Provider and it has recently been updated, updates may take some time to display. Please check back later to confirm. A new ID card will be sent automatically when a Primary Care Provider update is requested.

**SUBMIT ORDER**

[Back to Member Profile Page](#)

## Member Escalation

- If a member issue has become difficult to resolve through Member Services and/or tools in the online member portal ([myuhc.com/exchange](https://myuhc.com/exchange)), please complete the Member Escalation Form
- From Quick Links, select **Submit Member Escalation Form**
- Once an escalation has successfully been submitted, you can check the status of the request by clicking on **Member Escalation Status** in Quick Links
- Please note: this form should only be used to escalate member issues. For agent-specific issues and commission questions regarding your Book of Business, please continue to contact the PHD



## Member Escalation Form

1. This form is for member escalation issues only. **Prior to escalating**, you or your member must have attempted to call Member Services to attempt the resolution, but the issue was not resolved.
2. This form is not approved for member use, it must be filled out on behalf of the member.
3. Complete all fields to ensure timely processing of the request. Missing Information will delay escalation of the issue.

For AARP Medicare Supplement Plans, please use the Member Service Request Tool instead of the Escalation Form to request account updates and provide missing application information on behalf of your client. The Service Request Tool can be accessed via the Book of Business or Application Status page.

\*Required fields below.

Have you reached out to Member Service?

- Yes  
 No

## Change Provider

- From Quick Links, click **Change Provider**. Current and future providers are displayed; one or both can be changed.
- Click the **Change Provider** button on the right-hand side to **launch Rally** and make changes to the PCP.
- Click **Submit**.
- If the current PCP has been changed, the new PCP will become effective on the 1st of the following month.
- If changes are made to a future PCP, it will become effective as soon as the plan is effective.

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Stay informed on COVID-19  
Learn about the resources available to you. [See COVID-19 Resources](#)

United Healthcare Exchange Plans [FIND CARE](#) ENGLISH [SAVED](#)

AL INDIVIDUAL EXCHANGE BENEFIT PLAN

**William R. Kleinschrodt, MD** In-Network  
Internal Medicine  
★★★★★ (7) [Save](#) [\(251\) 435-1200](#) [Select PCP](#)

OVERVIEW SERVICES & COSTS LOCATIONS PATIENT REVIEWS

<b>Location</b> 1720 Spring Hill Ave Ste 300 Mobile, AL 36604 3.1 Miles Away   <a href="#">Get Directions</a>	<b>Phone</b> (251) 435-1200 Phone 711 TTY (251) 435-6351 Fax	<b>Accessibility</b> <a href="#">Parking &gt;</a> <a href="#">Bathrooms &gt;</a>	<b>Additional Information</b> Premium Care Physician Accepting Existing Patients Only <b>Provider ID</b> IMC-DIAGNOSTIC & MED CLINIC 001338373007
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## Application Details

- From the Member's Profile page, you can view the status and details of the application in **Application Details**.

[Member Information](#) **Application Details** [Commission Details](#)

**Application Status:**  
 ACTIVE

**Agent ID**

**Agent Name**

**Plan**

**Product**

**Product**

**Plan Code**

**State**

## Commission Details

- Also from the Member’s Profile page, you can view the status and details of your commission for that specific member in **Commission Details**.
- Note that your comprehensive commission information is available under the **Commissions** tab found on the navigation bar.

<b>Member Information</b>	<b>Application Details</b>	<b>Commission Details</b>
<b>Commission Status</b>		
✔ PAID		
<b>Commission Details</b>		
<b>Signature Date</b>		
<b>Agent Name</b>		
<b>Agent Id</b>		
<b>Organization Name</b>		
<b>Source</b>		

If you have any questions, please feel free to contact the PHD at **1-866-235-4095**, TTY 711, 7 a.m. to 9 p.m. CT, Monday - Friday.

