

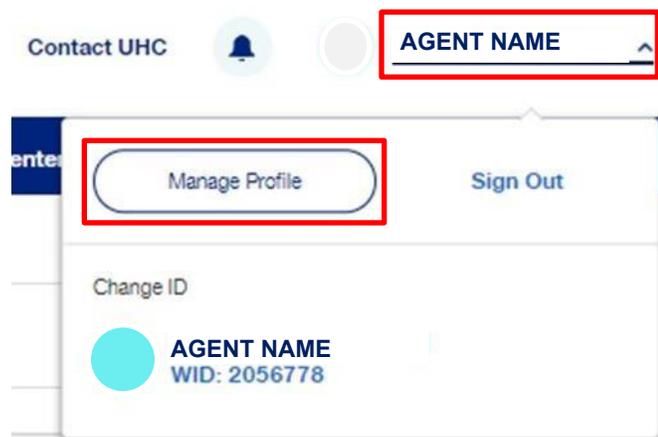
Delegated Access – Individual & Family Plans

The **Delegated Access** functionality allows you to provide a colleague access to your **Jarvis** account. You can provide different levels of access to your delegate, see when the delegate last logged in, and change your delegate’s access levels. The entire process takes no more than 2 minutes from start to finish for both the delegator and the delegate.

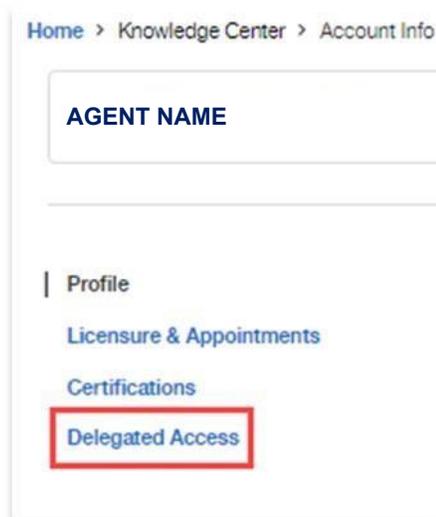
NOTE: Delegates may not engage in licensed sales activity. Licensed sales activity includes but is not limited to: (1) advising and individual on the suitability of a plan or plans based on the individual’s needs; and (2) completing an enrollment application on behalf of an enrollee.

Granting Delegate Access

- Log into **Jarvis** at www.uhcjarvis.com with your OneHealthcare ID. Go to your Profile page by clicking on the dropdown next to your, or your agency’s name. Click on the **Manage Profile** button.



- Select **Delegated Access** from the options in the column on the left.



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- Select **Active** or **Inactive** to view a list of active and Inactive users. To add a new delegated user, click on the **Add New Delegated User** button.



- Enter the First Name, Last Name and Email Address of a colleague whom you would like to grant access to your account. Click on the **Next** button.

Add New Delegated User

First Name

Last Name

Email Address

- Select the level of access that your colleague will receive your account as a delegate. Then click the **Submit** button. The delegate will receive an email requesting they register as a delegate.

Note: Only Agencies can select Level 5 access level

AGENT NAME

Choose Access Level

Level 1
 Level 2
 Level 3
 Level 4
 Level 5

FEATURES	LEVEL 1	LEVEL 2	LEVEL 3	LEVEL 4	LEVEL 5
Home Page	✓	✓	✓	✓	✓
Sales Tools	✓	✓	✓	✓	
Knowledge Center	✓	✓	✓	✓	
Application Status	✓	✓	✓		
Agent Search	✓	✓	✓		
Book of Business (Member Profile Page)	✓	✓			
Commissions	✓	✓			
AccountInfo Page	✓	✓*			
Reporting	✓	✓			✓

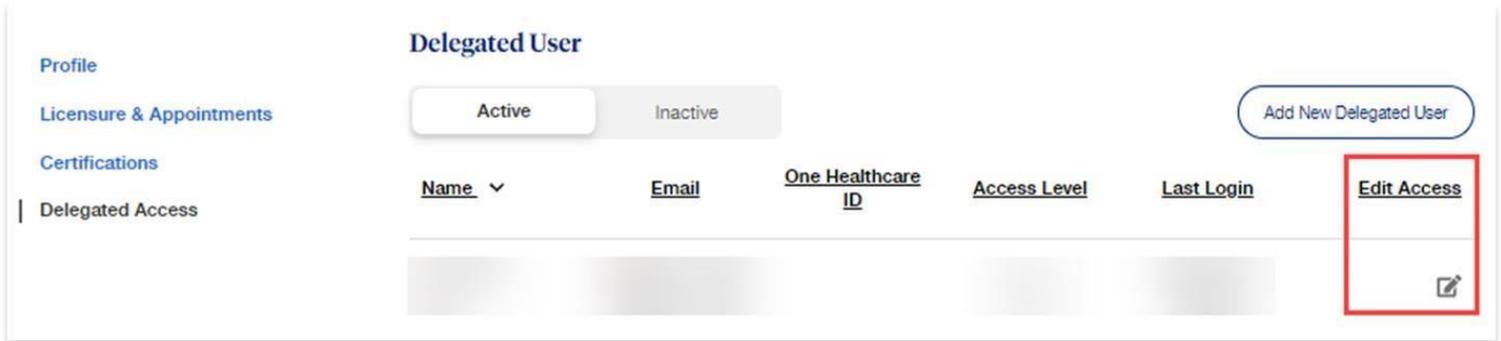
* Can not view delegated access

For ALL Levels (1-5): Delegates will not have access to the Account Holder's Personal Information, Direct Deposit Information and Writing/Agent ID Table. Delegates will not have access to Jarvis functionality that is not available to the Account Holder.

Editing Your Delegate Access

You can edit your delegate access from the Account Info page, Delegated Access tab. You will see a list of all the individuals you have provided delegated access to. If the delegate does not have a One Healthcare ID listed in the One Healthcare ID column, this indicates the delegate has not completed the registration process.

Select the pen-inbox icon on the right to edit the access for the delegate.



1. If a delegate user has not created a One Healthcare ID, you can resend the invitation by selecting the **Resend Registration Request** button.
2. If you wish to reassign an access level, you can select a new access level and click **Submit**.
3. To remove a delegate's access from your account, select **Remove Access**, then click the **Yes - Remove**, button.

Note: Only Agencies can select Level 5 access level

AGENT NAME

2 Level 1 Level 2 Level 3 Level 4 Level 5

FEATURES	LEVEL 1	LEVEL 2	LEVEL 3	LEVEL 4	LEVEL 5
Home Page	✓	✓	✓	✓	✓
Sales Tools	✓	✓	✓	✓	
Knowledge Center	✓	✓	✓	✓	
Application Status	✓	✓	✓		
Agent Search	✓	✓	✓		
Book of Business (Member Profile Page)	✓	✓			
Commissions	✓	✓			
Account Info Page	✓	✓*			
Reporting	✓	✓			✓

* Can not view delegated access

For ALL Levels (1-5): Delegates will not have access to the Account Holder's Personal Information, Direct Deposit Information and Writing/Agent ID Table. Delegates will not have access to Jarvis functionality that is not available to the Account Holder.

1

3 Are you sure you want to remove access for AGENT NAME?

How to access Jarvis as a Delegate

You will receive an invitation to your email address that provides the opportunity to register as a delegated user. Select [Click Here](#) from the invitation to your email.

From: no_reply@optum.com <no_reply@optum.com>

Sent:

To:

Subject: Sign-in or Register as delegated User invite

Hello User,

Welcome to **Jarvis**! You have been invited to become a **Jarvis** delegate for AGENT NAME. Upon registration, you will become eligible to access **Jarvis** on behalf of AGENT NAME.

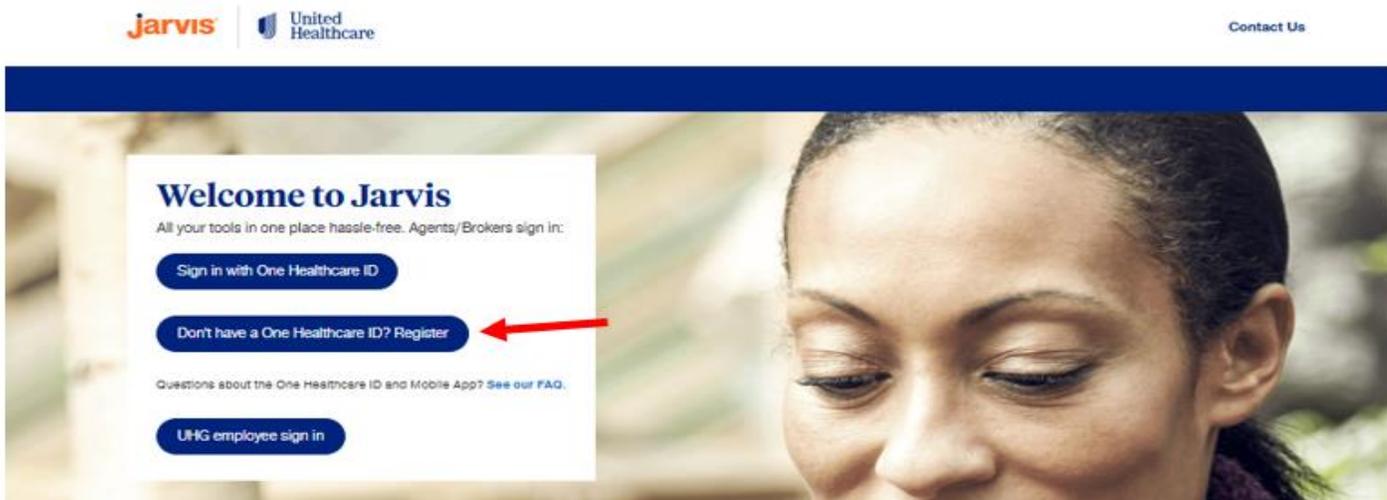
Directions:

1. Please [click here](#) to complete the registration process.
2. Select the register hyperlink to complete the steps. As part of registration process, enter the email address from which you received the invitation to delegated access.
3. Log in as a delegate.

Thank you very much from,
The UnitedHealthcare **Jarvis** Team

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Select **Register** on the left side of the screen. Do NOT click the register button at the top right.



Create your One Healthcare ID. Please note the rules for your ID and Password. When completing the registration process as a delegate, you will need to associate your One Healthcare ID with the same email where you received the registration request.

If you already have a One Healthcare ID, click the **Sign in** link.

Read and click **I Agree** to the **Terms of Use** and **Website Privacy Policy** and then **Continue**.

jarvis | United Healthcare

Create One Healthcare ID

Already a User? [Sign In](#) * Required Fields

First Name*

Last Name*

Email Address*

Create One Healthcare ID* (Username)

Password*

Confirm Password*

Phone Number

+1 555-555-5555

You must agree to the [Terms of Use](#) and [Website Privacy Policy](#) to use the One Healthcare ID service. If you do not agree, do not use any aspect of the One Healthcare ID service.

Continue

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The next step is to verify your email address. Check your email and open the message from One Healthcare ID-NoReply <noreply@onehealthcareid.com>.

Click on **Activate my One Healthcare ID** or copy and paste the 10-digit code provided. You will be notified that your email address has been verified. Click the **Continue** button.

From: One Healthcare ID-NoReply <noreply@onehealthcareid.com>
Date:
To:
Subject: Confirm your One Healthcare ID email address

One Healthcare 

Your One Healthcare ID

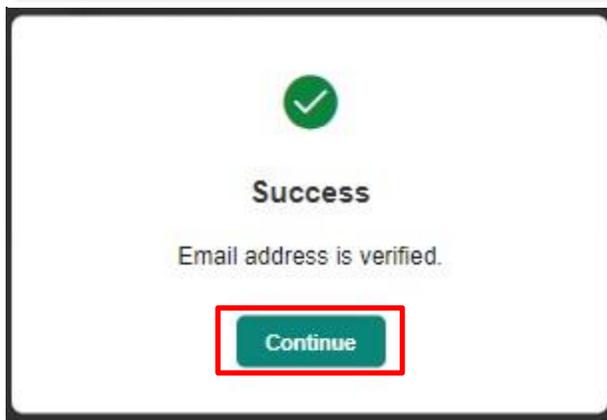
[Activate my One Healthcare ID](#)

If you prefer, copy this 10-digit code **1234567890** and paste it into the box for the activation code on the Activate Your One Healthcare ID page.

If you did not request an activation link or code, or if you have questions about setting up an One Healthcare ID, contact us at 1-855-819-5909 or optumsupport@optum.com.

Thank you,

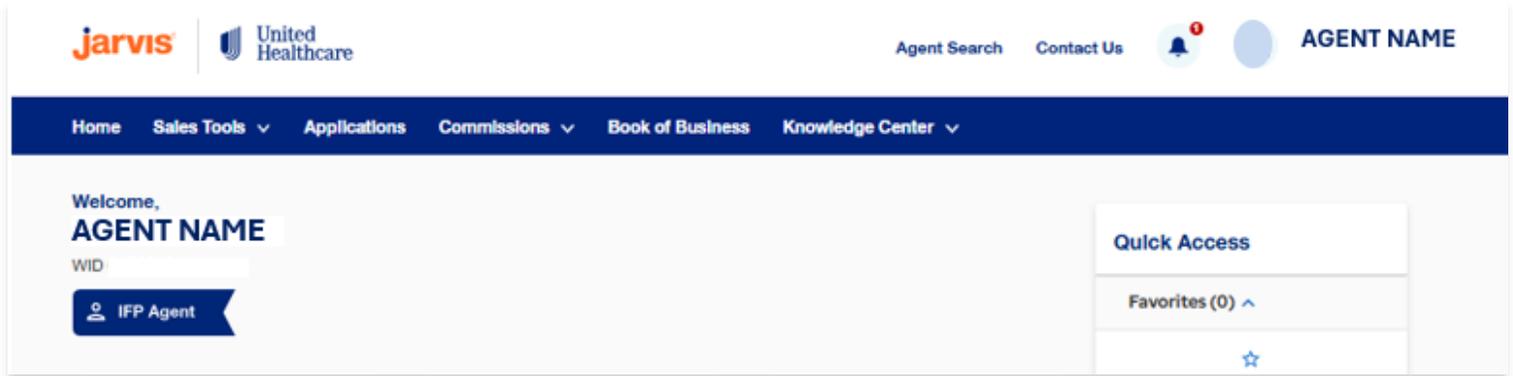
One Healthcare ID



Log into **Jarvis** using the One Healthcare ID and password you created as part of the delegate registration.

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You will navigate **Jarvis** as a representative of the delegator's account.



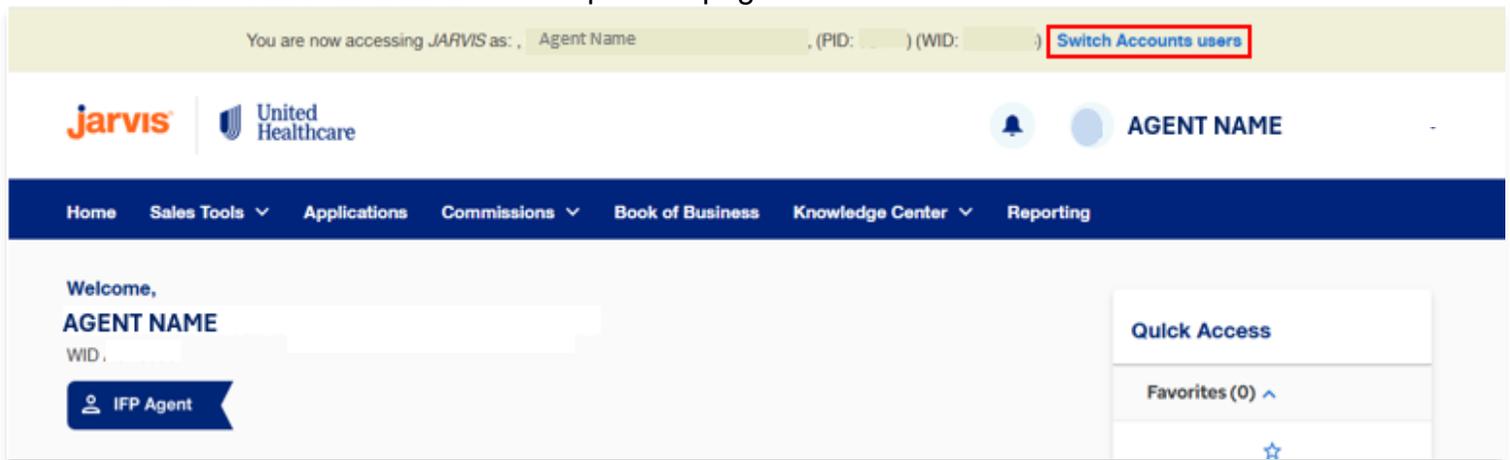
If you are a delegate for more than one account, you will be prompted to select the delegator's account you wish to access.

Login As :

Agent Name 1

Agent Name 2

If you are a delegate for more than one account, and you wish to switch while already logged into **Jarvis**, select **Switch Accounts Users** at the top of the page.



If you have any questions, please feel free to contact the Producer Help Desk at **1-866-235-4095**, TTY **711**, 8 a.m. to 7 p.m. CT, Monday - Friday.