Jarvis Individual and Family Plans User Guide

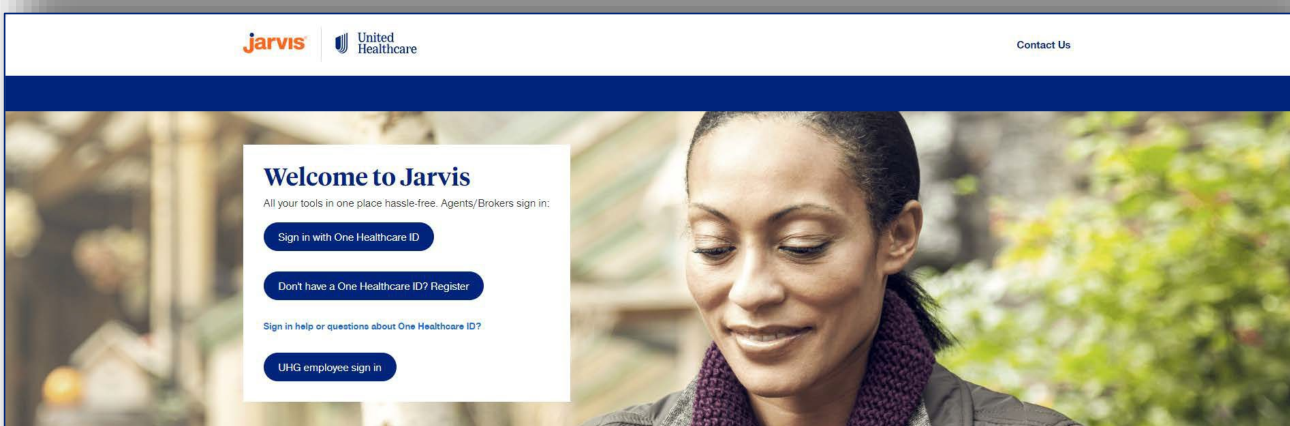
Updated: October 2024

jarvis

United Healthcare

Jarvis User Guide

Guide Table of Contents



Jarvis User Guide

Introductory Highlights

Introductory Highlights

Find what you need to know on demand, 24/7. The more you know about ***Jarvis***, the better you will be able to take advantage of all the tools at your fingertips. ***Jarvis*** is your destination for:

- Book of business
- Application status
- Age-in and late payment reports
- Commission information and statements
- Guides, resources and FAQs
- UnitedHealthcare sales and marketing materials
- Agent training
- And more

Jarvis is mobile responsive on Apple and Android devices.

Jarvis Access

Signing in to *Jarvis*

First-time users creating a new *Jarvis* account:

- Go to **www.uhcjarvis.com**
- First-time users will need to create a One Healthcare ID by clicking **'Register'**

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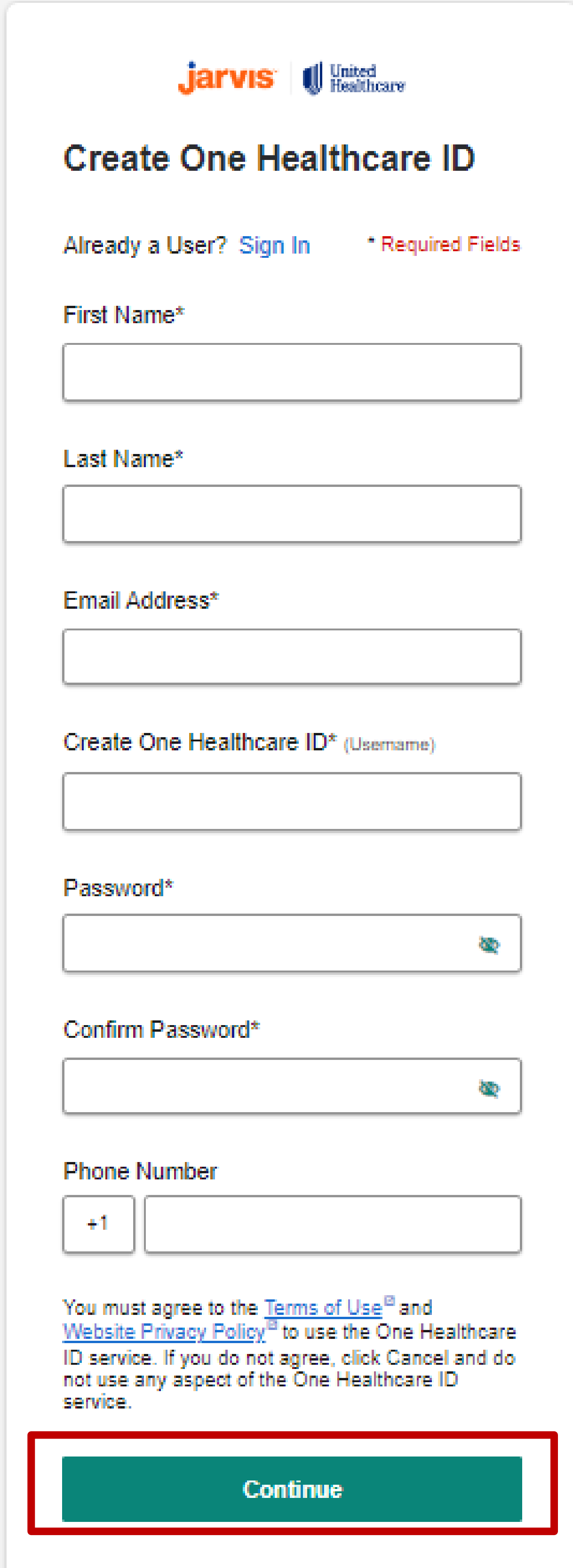
- Complete profile information and sign-in information

- Create your One Healthcare ID and password

- ID requirements:
  - Between 6 and 50 characters
  - At least one letter
  - No spaces
  - No letters with accents
  - None of these symbols: %+”&[\]^‘{|}<>#,/;():*=~

- Password requirements:
  - Between 8 and 100 characters
  - At least one uppercase letter
  - At least one lowercase letter
  - At least one number
  - No spaces
  - Do not use the “&” symbol

- Once you have successfully chosen a password and read the Terms of Use and Website Privacy Policy, click **‘Continue’**

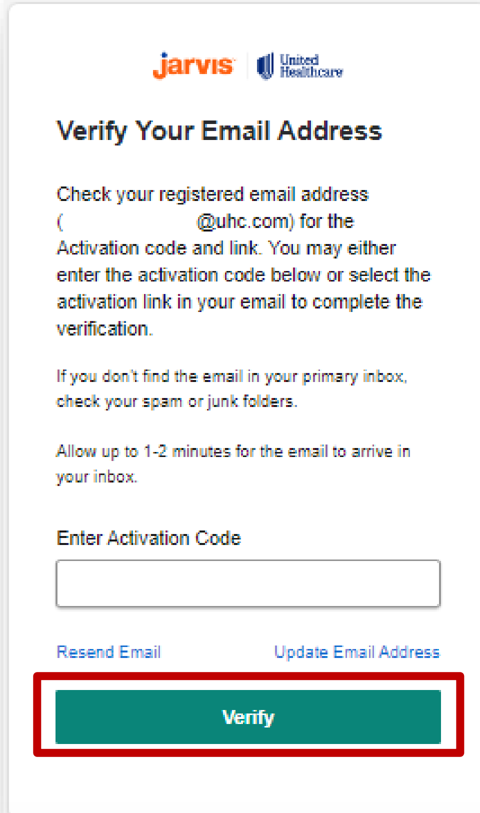


If you'd like assistance, contact support at **1-866-235-4095** or [ACABrokerSupport@uhc.com.](mailto:ACABrokerSupport@uhc.com)

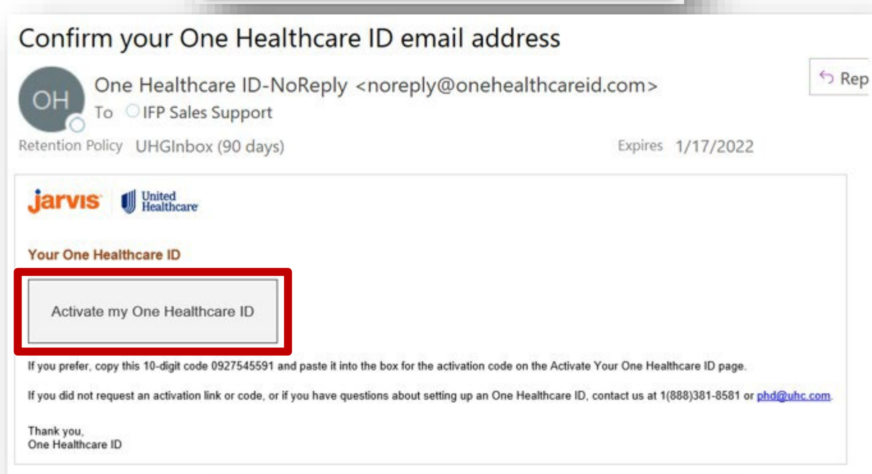
Jarvis User Guide

- Once you have clicked **'Continue,'** ***Jarvis*** will send an email from noreply@onehealthcareid.com to the address provided.

- Verify your email address to move forward

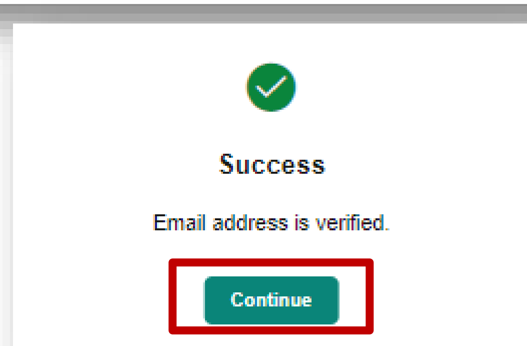


- Click the '**Activate my One Healthcare ID**' button to activate your account



- After activating your One Healthcare ID, a pop-up message will confirm that your email address is verified

- Click '**Continue**' and sign in to Jarvis



If you'd like assistance, contact support at **1-866-235-4095** or [**ACABrokerSupport@uhc.com.**](mailto:ACABrokerSupport@uhc.com)

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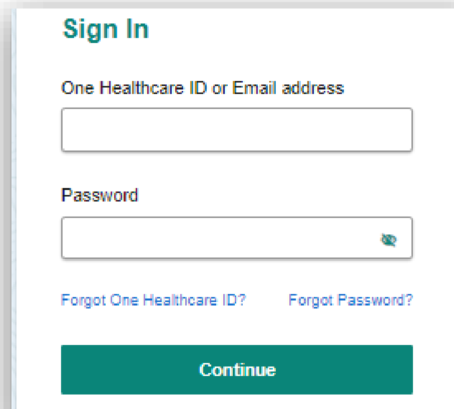
Returning Users:

- Go to **www.uhcjarvis.com**

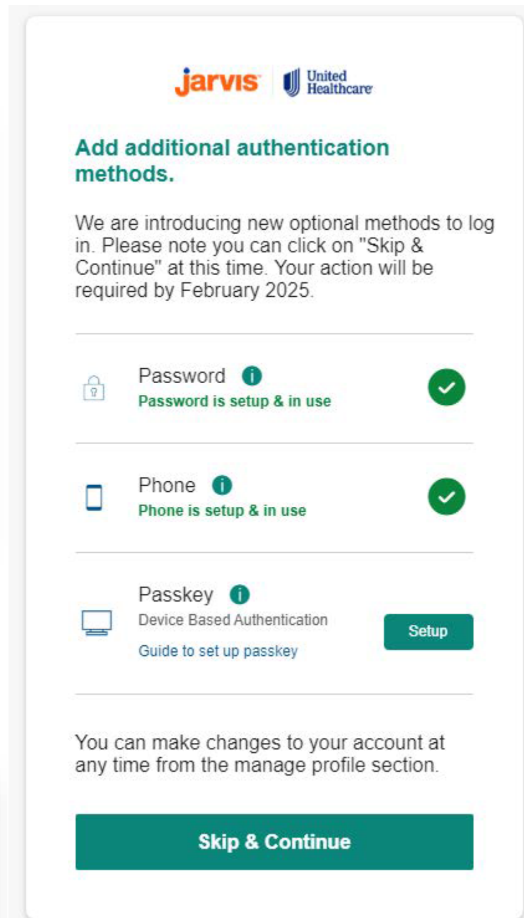
- Click '**Sign in with One Healthcare ID'**

- Use your One Healthcare ID and password to sign in to ***Jarvis***

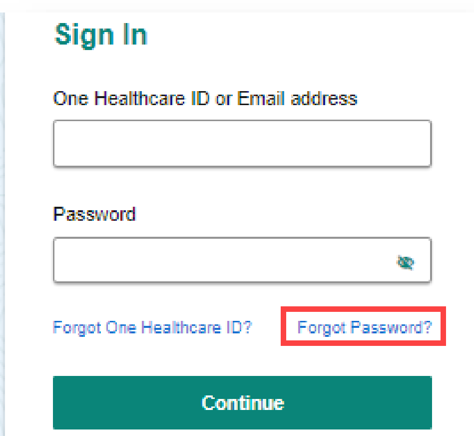


- As an added security enhancement, users will be asked to verify their login by sending a code to their phone or email, but the email option will not be available after February 2025

- Additional methods of verification for passkey and phone authentication are also available (fingerprint and/or face ID)

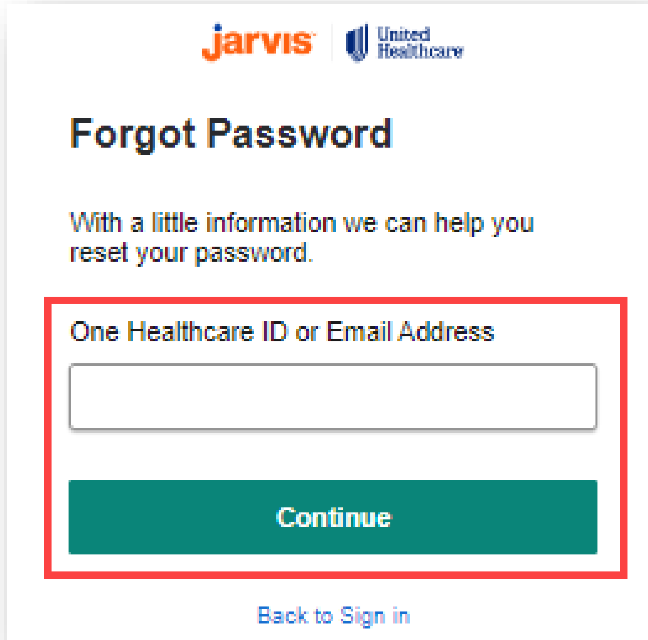


- ***Jarvis*** accounts will lock for one hour after three failed login attempts. If you have reached three failed attempts, click **'Forgot Password'**



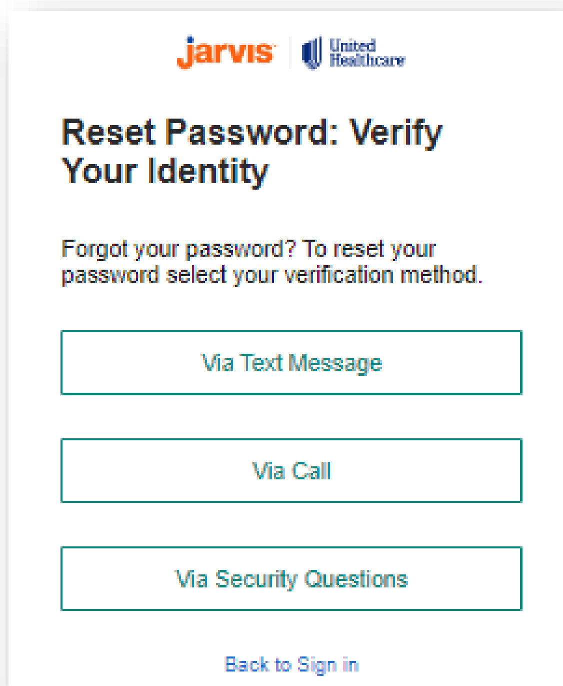
Reset Password:

- Enter your email address or One Healthcare ID, and click **'Continue'**



- Select whether you wish to have a text message sent, receive a call, or answer security questions

- Follow the instructions if you selected text message, receive a call, or answer the two security questions accurately. All choices will prompt you to enter a new password



If you'd like assistance or need help, contact support at **1-866-235-4095** or [ACABrokerSupport@uhc.com.](mailto:ACABrokerSupport@uhc.com)

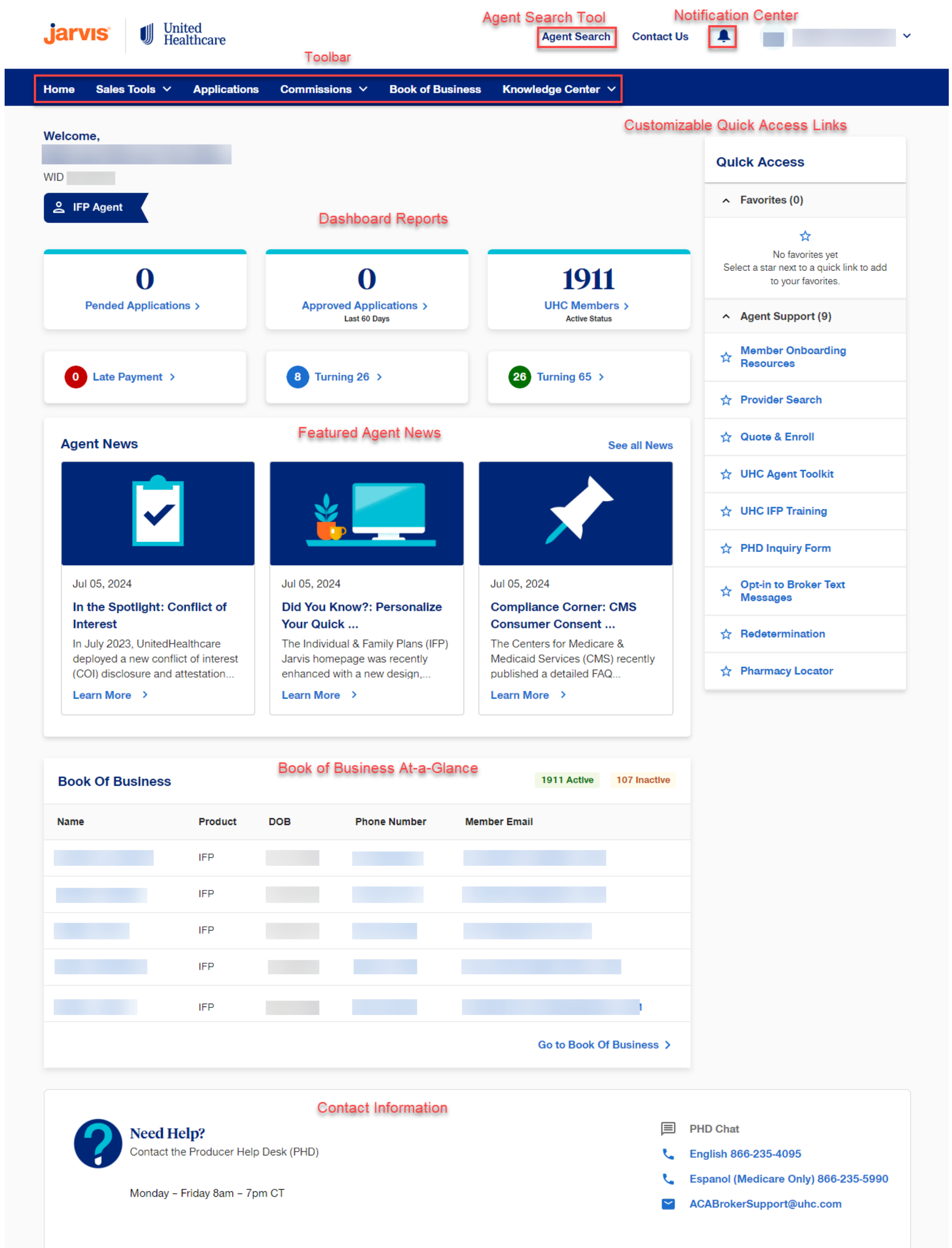
Homepage

Homepage

The ***Jarvis*** homepage allows you to stay up-to-date with relevant news and other key information.

Navigate the site by any of these methods:

- Select an item on the toolbar and use the drop-down button
- Access your book of business and search for application status
- Access Late Payment and Age-in reports (Turning 26 and Turning 65)
- Use the customizable quick links sidebar to access helpful resources
- Get notified of important updates through the notification center
- Access your account information by clicking your name in the top-right corner next to the Notification Center



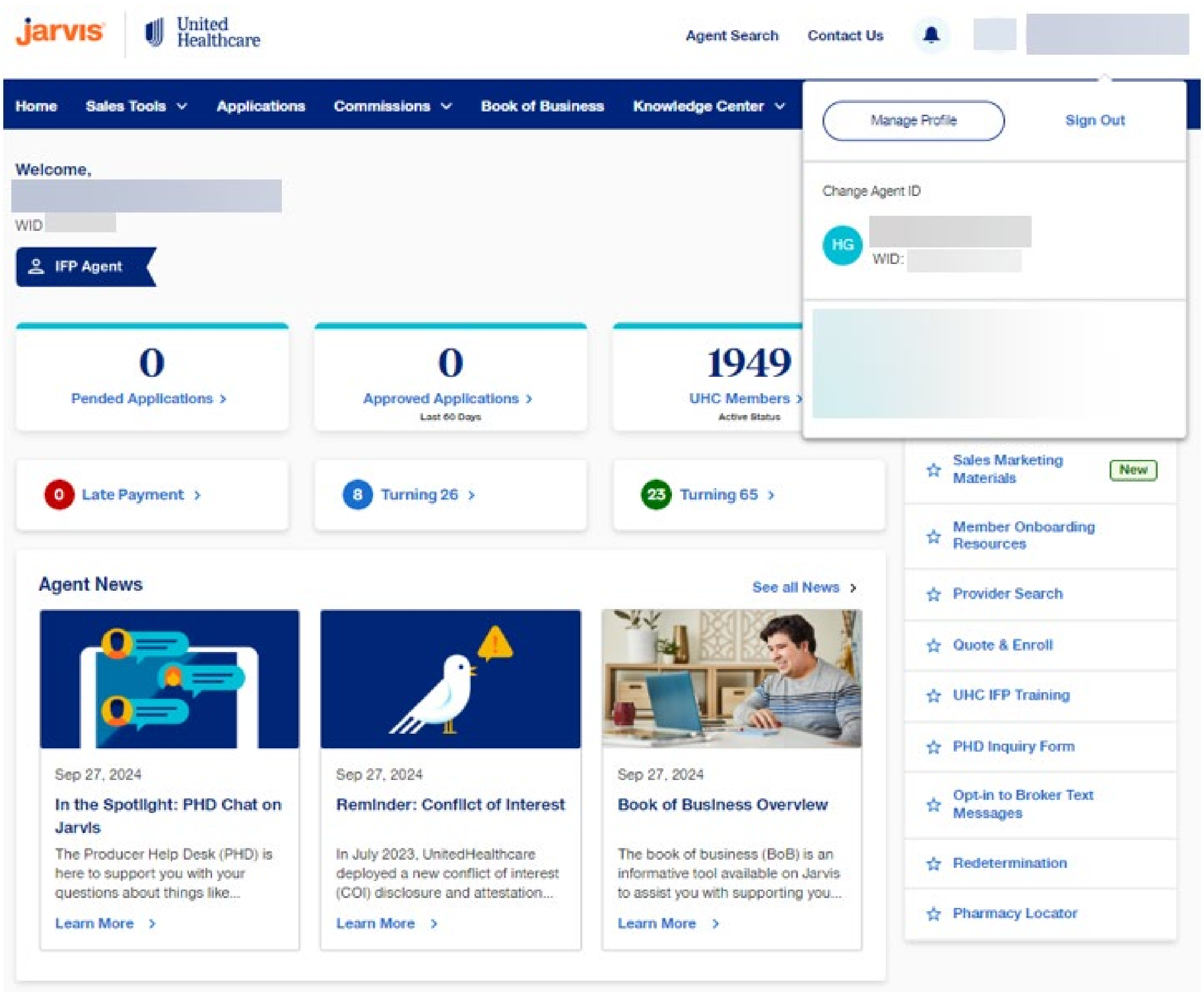
- Need Help? Use the Producer Help Desk's (PHD) contact information or click "PHD Chat" to start a live chat session for assistance

Homepage

Account Information

Account information can be accessed from the homepage by clicking on the drop-down icon next to your name. Here you can access:

- Personal information such as primary address, phone, email, agent ID, party ID, agent type and agent level, etc., are located under the “Profile” tab
- Licensure and Appointments are alphabetical by state
    - It will list if you are licensed to sell, the licensure expiration date and if you are appointed
- If you have a ‘Downline Hierarchy,’ this information will be displayed
- Delegated access can also be viewed under this tab
- View Federally-facilitated Marketplace certification status

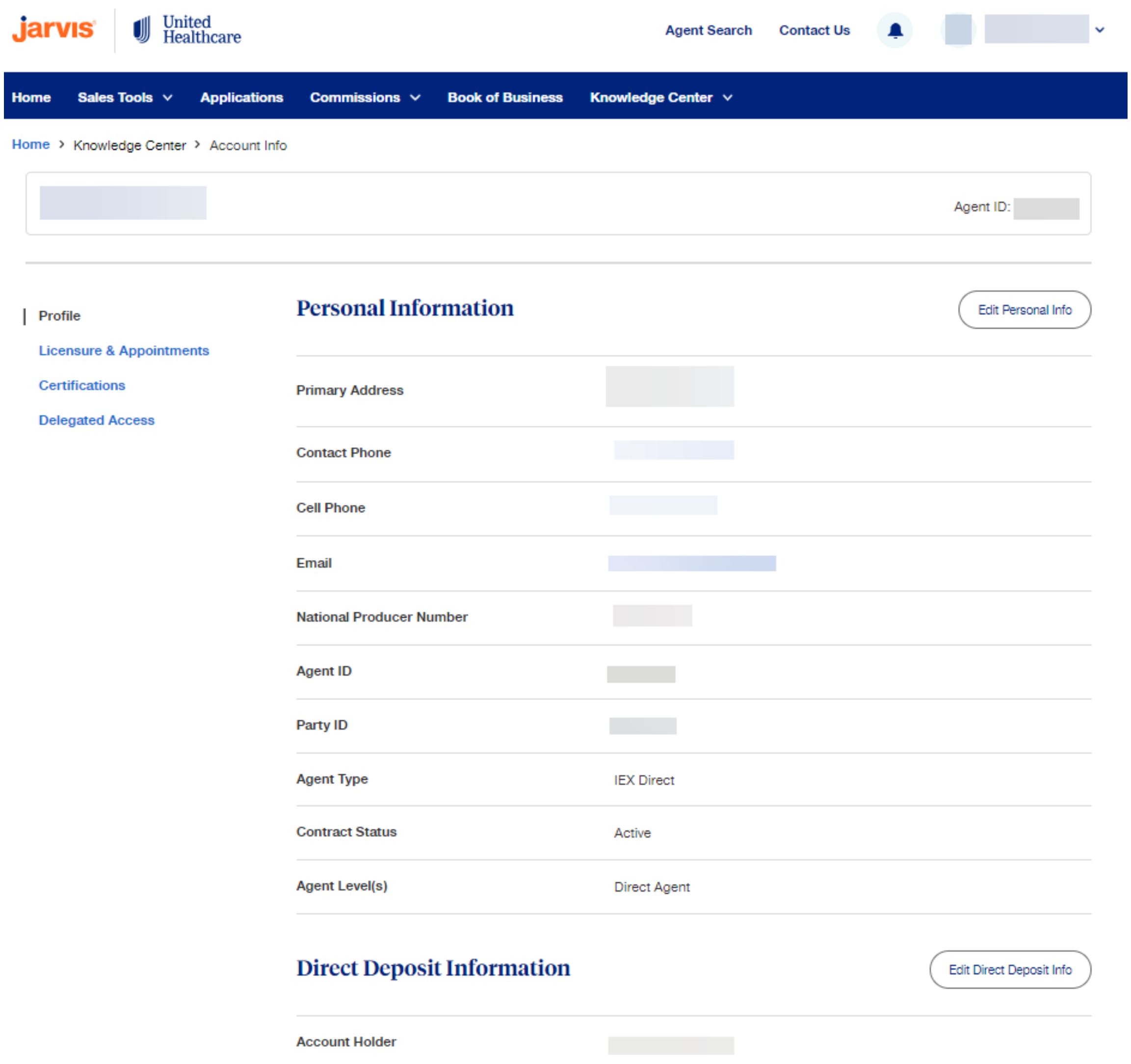


Homepage

Account Information Continued

Personal Information

Here, you can find view your NPN, agent ID, party ID, agent type, agent level, contract status, and see what we have on file as your contact information. You can also add direct deposit information here.

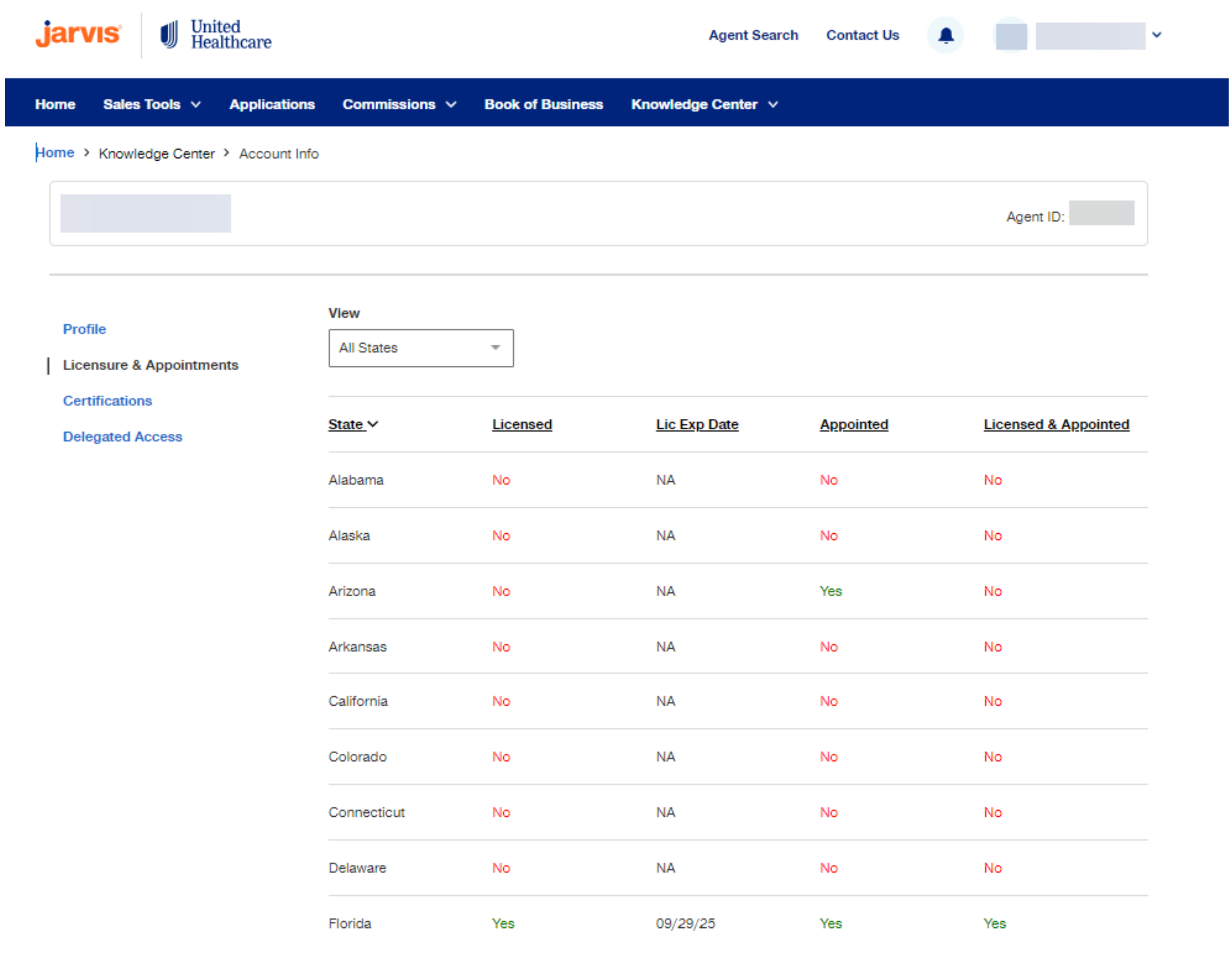


Homepage

Account Information Continued

Licensure & Appointments

Confirm your state licensure, appointments, and license expiration dates. On this page, your resident state will be highlighted.



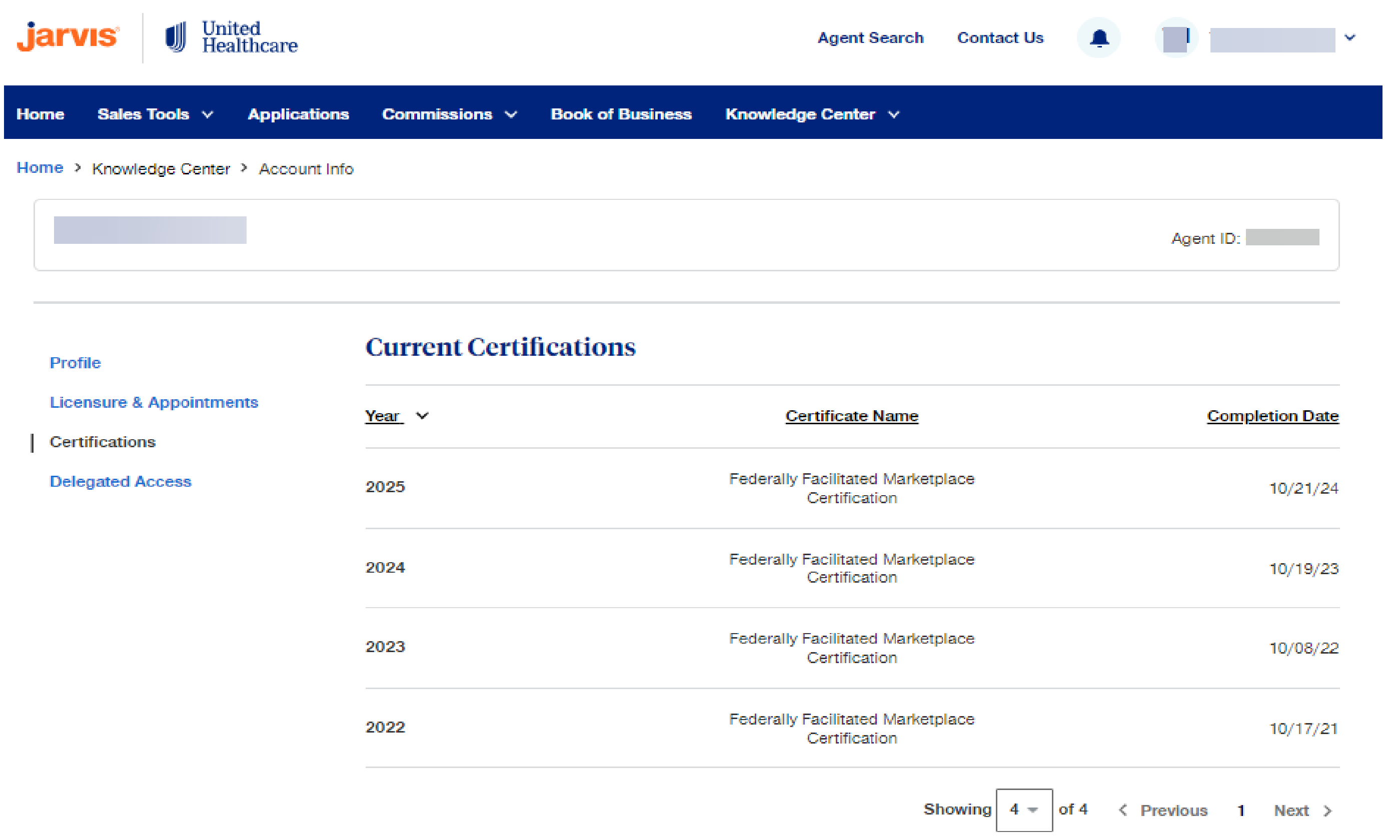
State	Licensed	Lic Exp Date	Appointed	Licensed & Appointed
Alabama	No	NA	No	No
Alaska	No	NA	No	No
Arizona	No	NA	Yes	No
Arkansas	No	NA	No	No
California	No	NA	No	No
Colorado	No	NA	No	No
Connecticut	No	NA	No	No
Delaware	No	NA	No	No
Florida	Yes	09/29/25	Yes	Yes

Homepage

Account Information Continued

Certifications

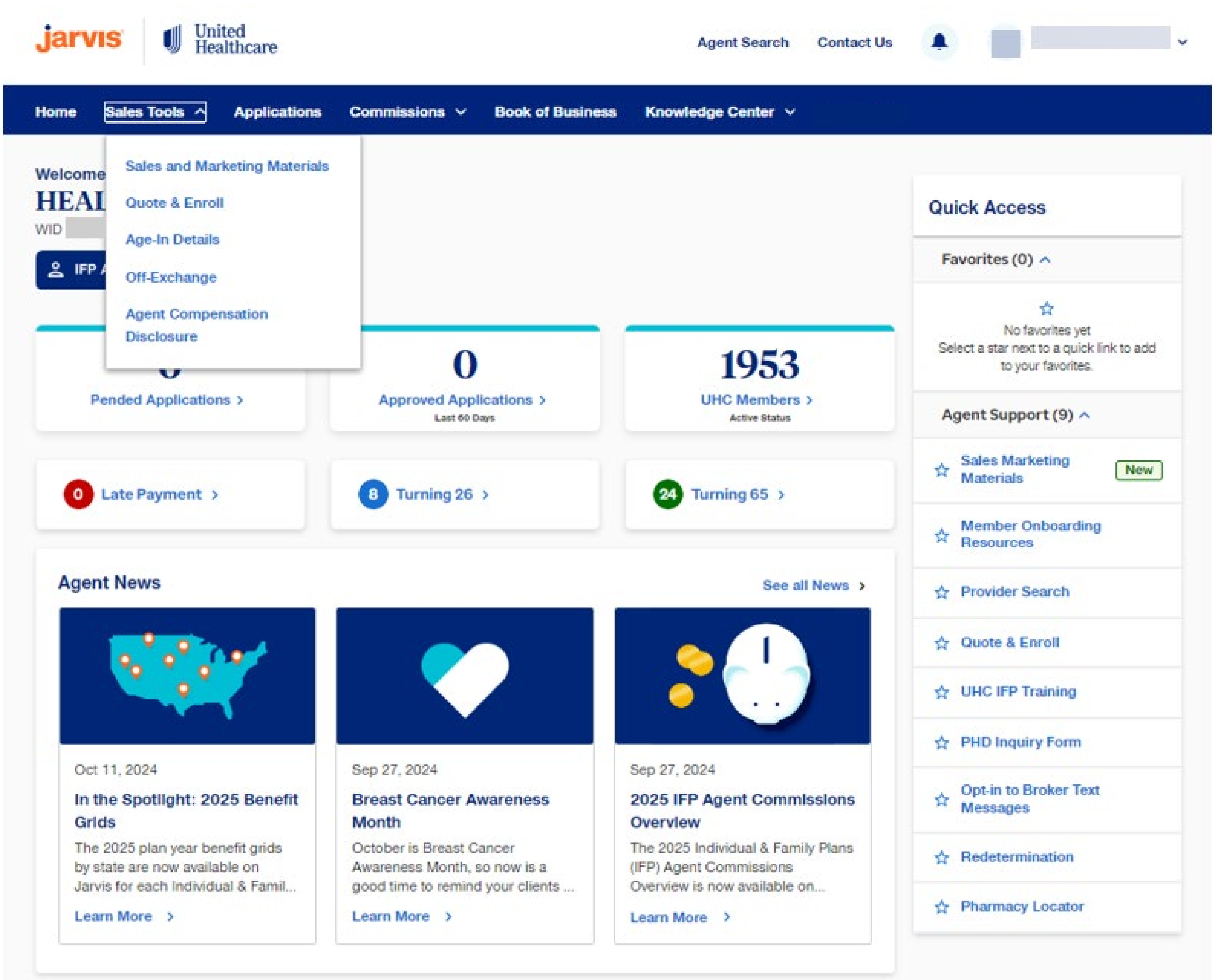
Confirm your state licensure, appointments, and license expiration dates. On this page, your resident state will be highlighted.



Sales Tools

The Sales **Tools** tab is where you can find:

- Sales and Marketing Materials
- Quote and Enroll tool
- Age-In Details
- Off-Exchange information
- Agent Compensation Disclosure information

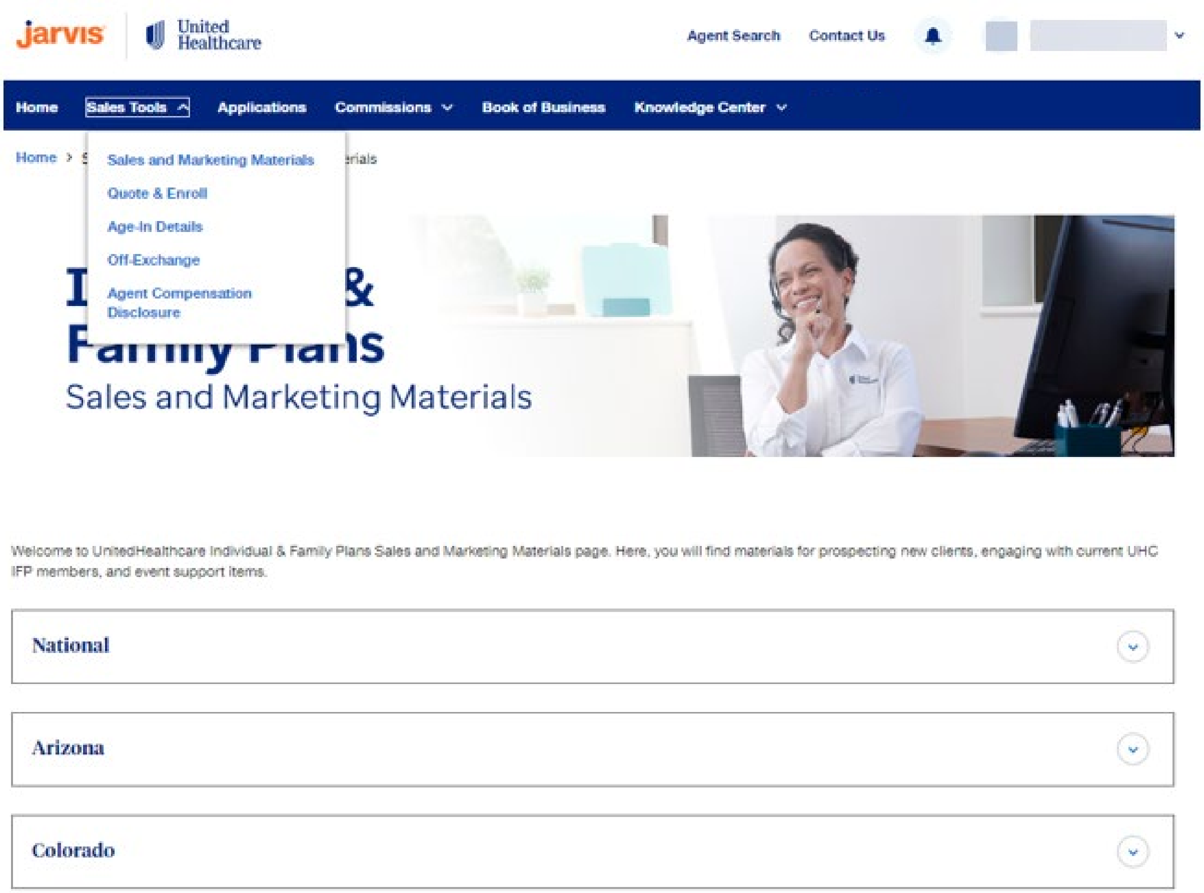


Sales Tools

IFP Sales and Marketing Materials

UnitedHealthcare Sales and Marketing Materials – Here, you will find materials for prospecting new clients, engaging with current UHC IFP members, and event support items. Marketing and enrollment materials may vary by state (i.e., they may be state-specific).

UHC Brand Center – Need items for an event? No problem. UnitedHealthcare® Branded promotional items are great to use as small giveaways at in-home appointments, community meetings and other events. You may purchase branded items such as pens and note pads, on the UnitedHealth Group online Brand Center.



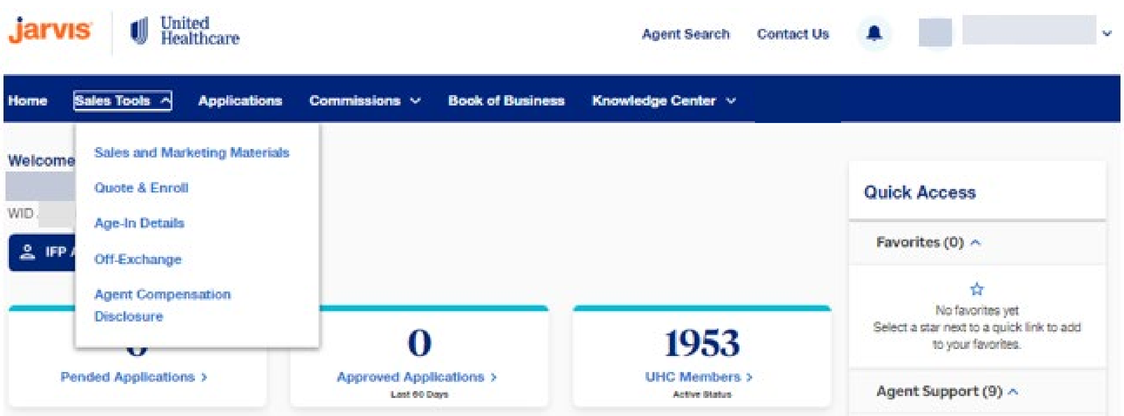
Sales Tools

Quote and Enroll

Quote and Enroll – This link connects you directly to the Quote and Enroll tool.

What is the Quote and Enroll tool?

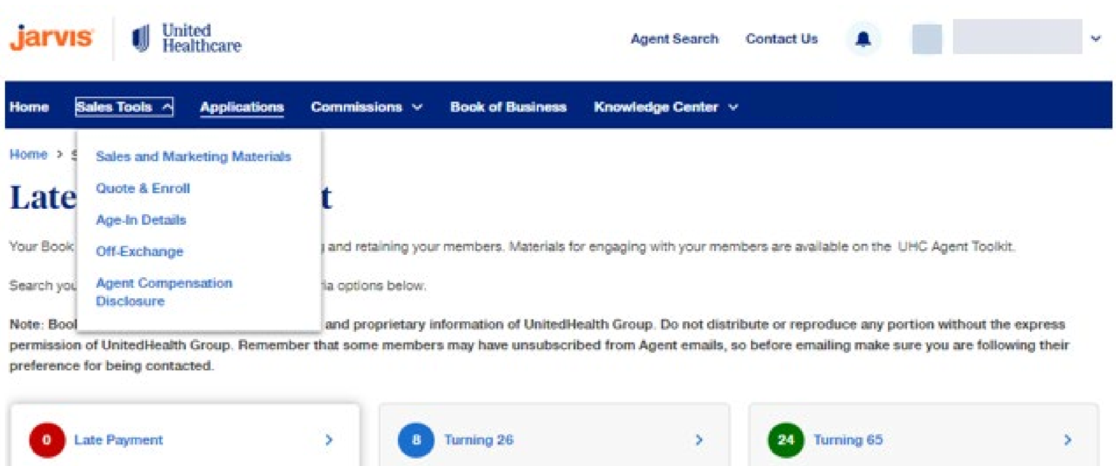
- User-friendly platform to quickly browse through available health insurance plan options
- Process applications, submit follow-ups and track statuses
- Synced with healthcare.gov



Click here to view the Quote and Enrollment Guide.

Age-In Details & Late Payment Report

Age-In Details & Late Payment Report – Here, you can quickly and easily identify your clients who may need additional support due to age-related changes to coverage. You can also identify clients who may be missing their monthly premium payment by viewing the late payment report.



Sales Tools

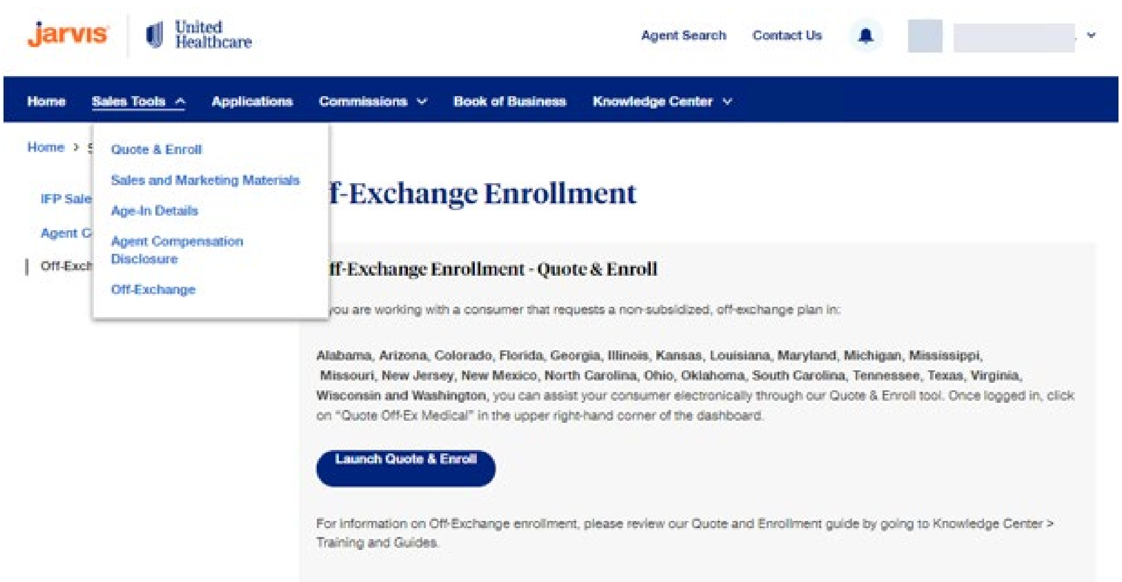
Agent Compensation Disclosure

Agent Compensation Disclosure – Here, you can find resources regarding the agent/broker compensation disclosure requirements, including talking points and FAQs.

[Click here](#) to view the Agent Compensation Disclosure Requirements FAQ.

Off-Exchange

Off-Exchange – Here, you can find information regarding Off-Exchange enrollment.

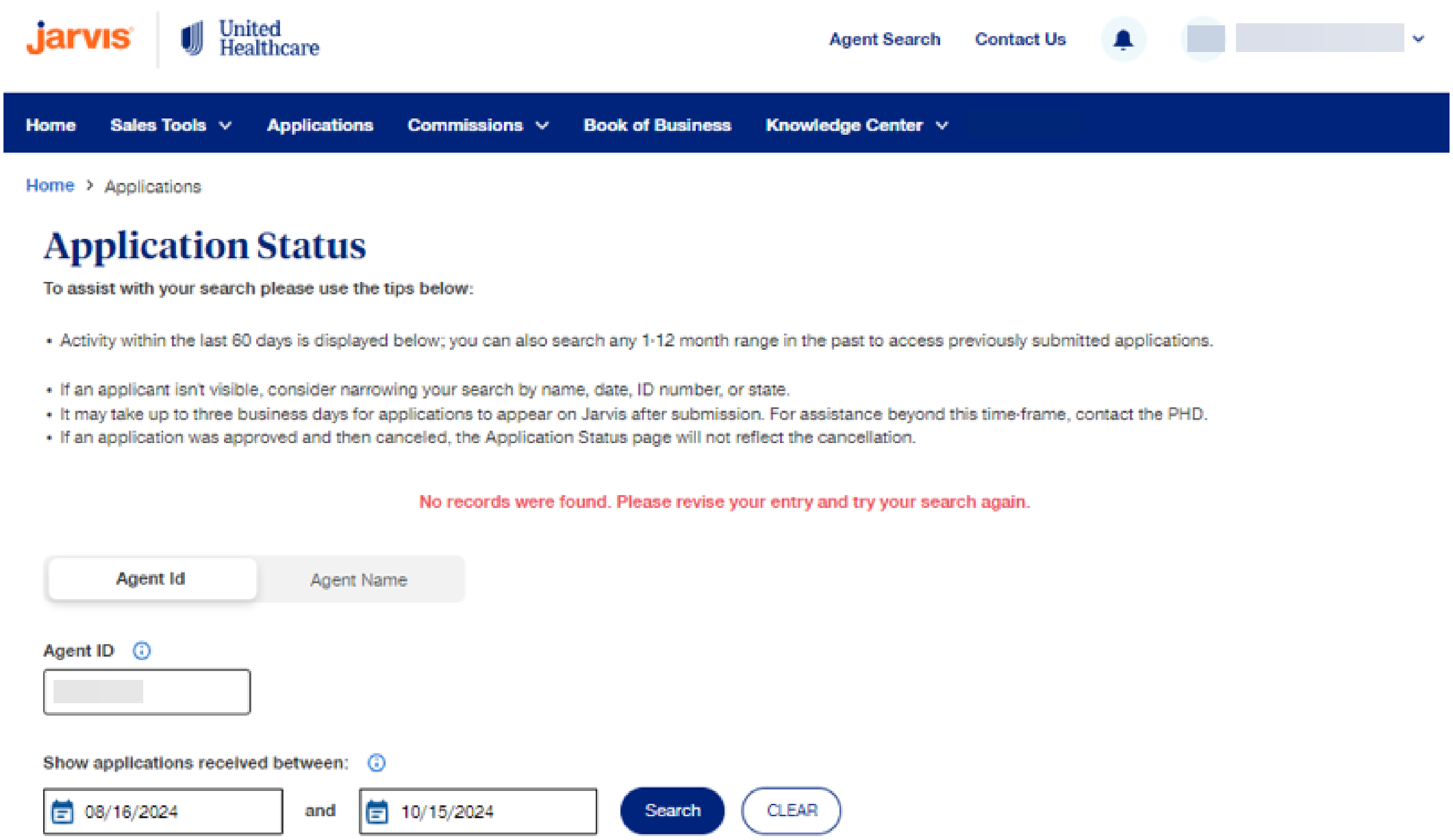


[Click here](#) to view the Off-Exchange Enrollment.

Applications

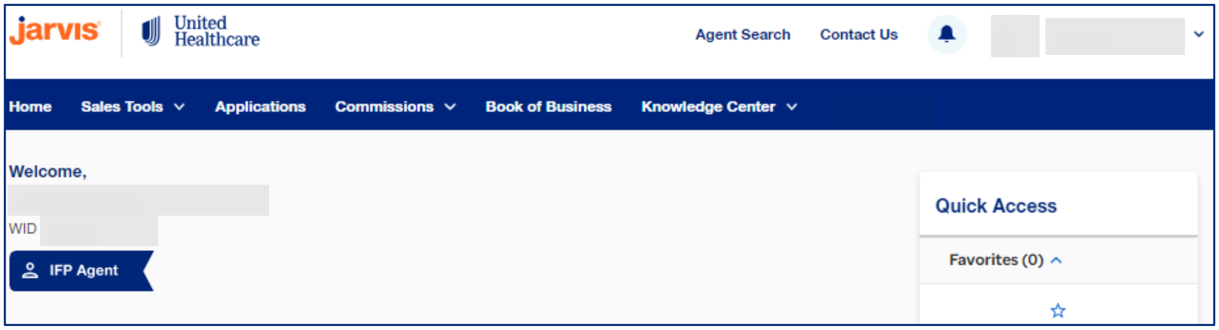
Applications

- View your customer's application status and recent activity at any time. This will improve tracking of your business and bring awareness to necessary actions, ensuring enrollment effectuation.



[Click here] to view the IFP Application Status QRG.

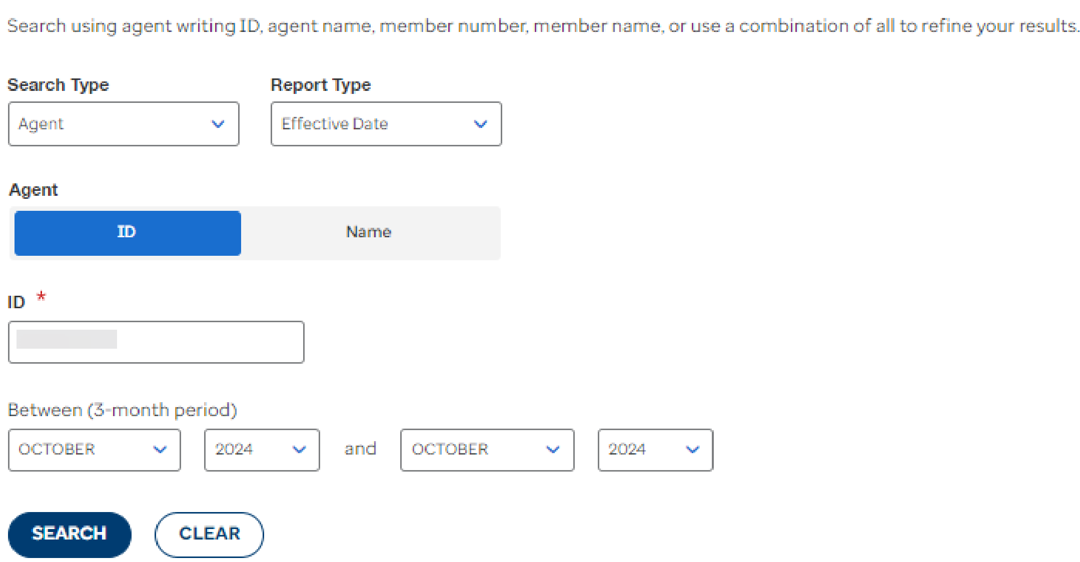
Commissions



Commission Search:

- Commission Search displays commission details related to policies paid, charged back, and held (pending) based on member effective date or application signature date. Enter one or more search criteria in the fields below to see a list of commissions that match your criteria.

- Commission Search will also allow you to filter and search commissions between a 3-month period by month and year



- The Commission Search Results will show the member name and number, effective date, state the application was written for, product, agent ID, agent name, status, and reason.

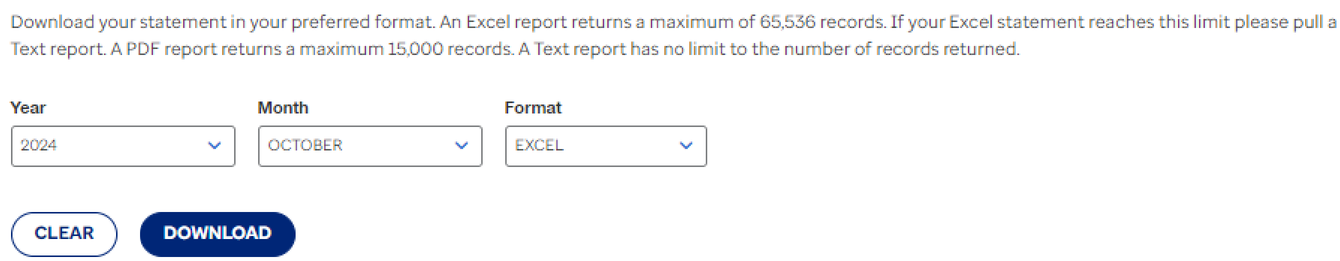
- If an “in process” status is shown, click on the blue **“Information Icon”** to see an explanation of all the status codes.

If you think any commissions are pended in error (you were active, licensed and appointed at the time of sale), please contact the PHD for further assistance.

Commissions

Statements and More

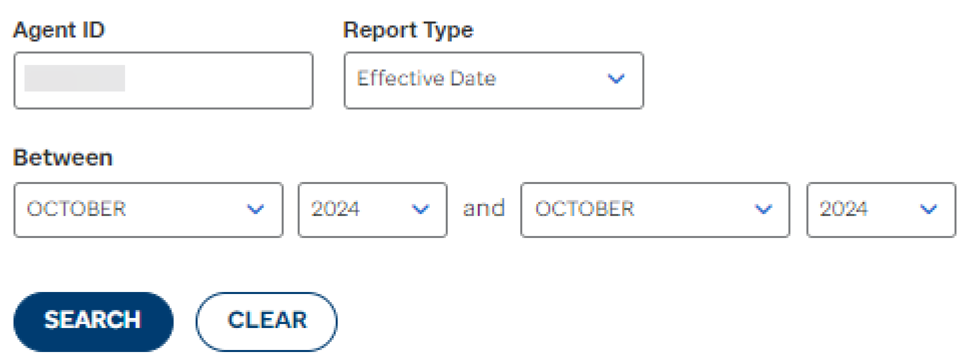
This page allows you to download your commissions statements for a specific month and year, in a preferred format.



On this page, you can access information such as the **Commissions Calendar, Direct Deposit Information, Assignment of Commissions, Successor Agent, Release, and 1099.**

Production Summary

This page allows you to view summaries for you and your downline agents, based on member effective date or application signature date.

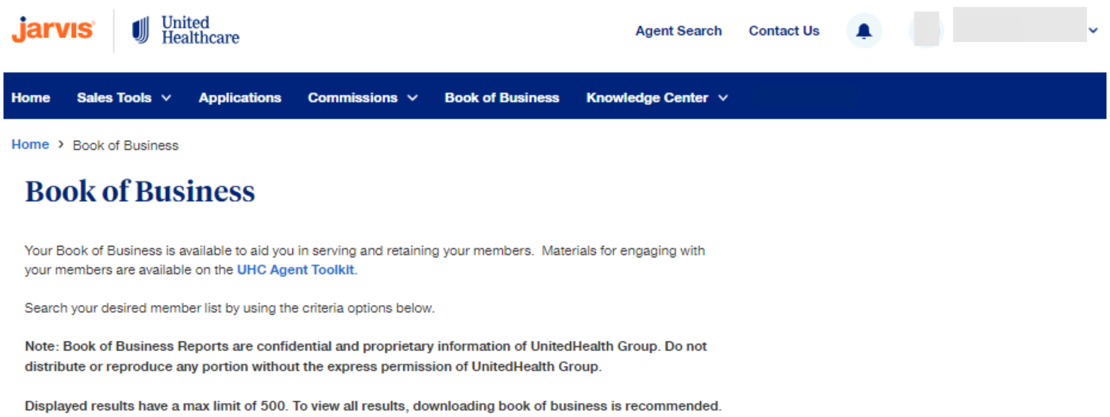


Click here to view the Commissions Overview Guide.

Book of Business

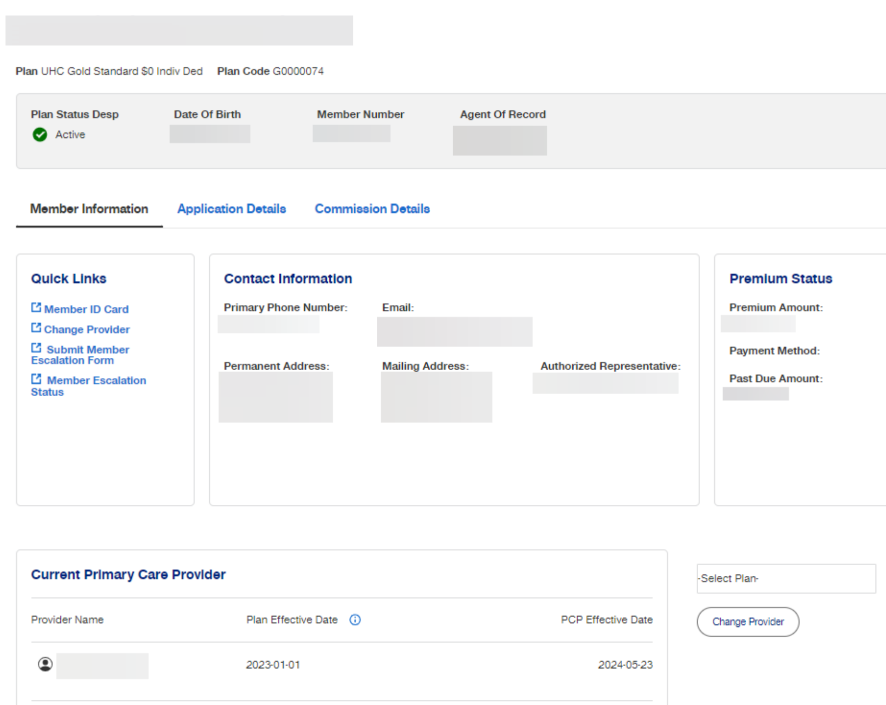
Book of Business

The book of business report offers an opportunity for agents to view a list of their active and inactive members with UnitedHealthcare Individual & Family plans.



[Click here](#) **to v**iew the Book of Business FAQ.

Member Profile Page – Through the book of business report, you will be able to support your clients through the Member Profile page. You can order a member ID card, view application and commission details, change the Primary Care Provider (PCP) for a member and submit a Member Escalation form on behalf of your client. Additionally, you can view your clients plan status, premium states and the agent of record.



Book of Business

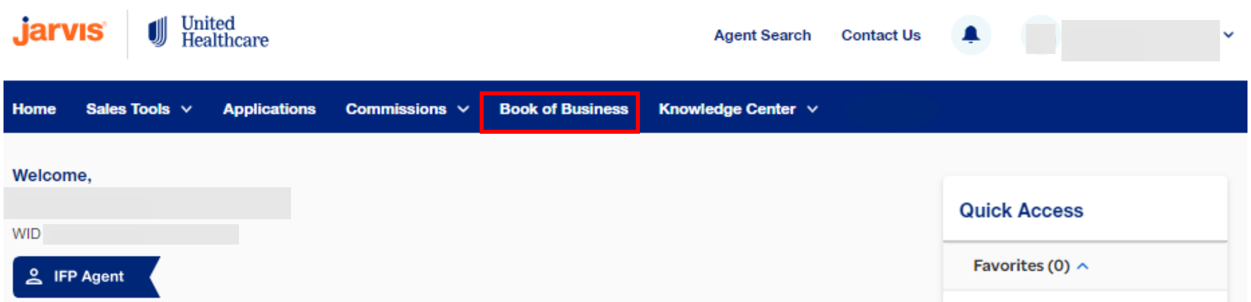
Member Profile Page Continued

The Member Profile Page can be accessed through two ways:

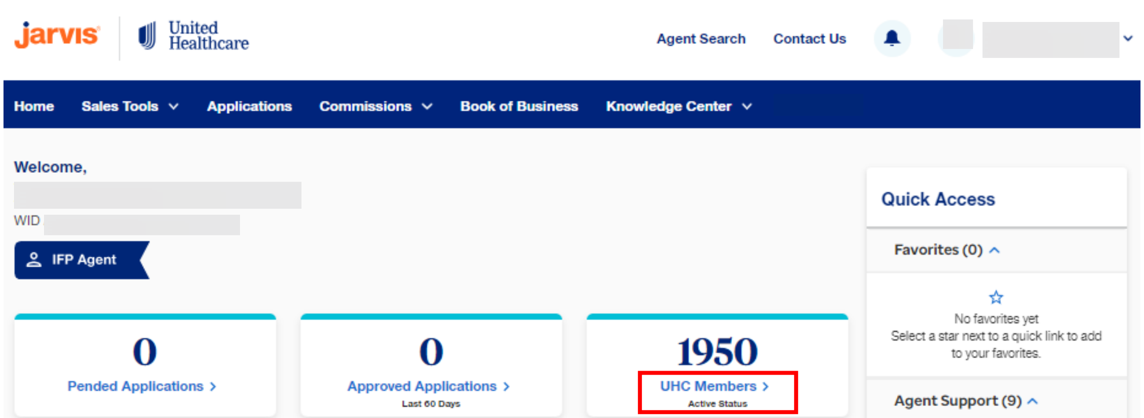
1. The Book of Business tab
2. Jarvis homepage by clicking **‘UHC Members’**

Both access options are pictured below.

Book of Business Tab Access

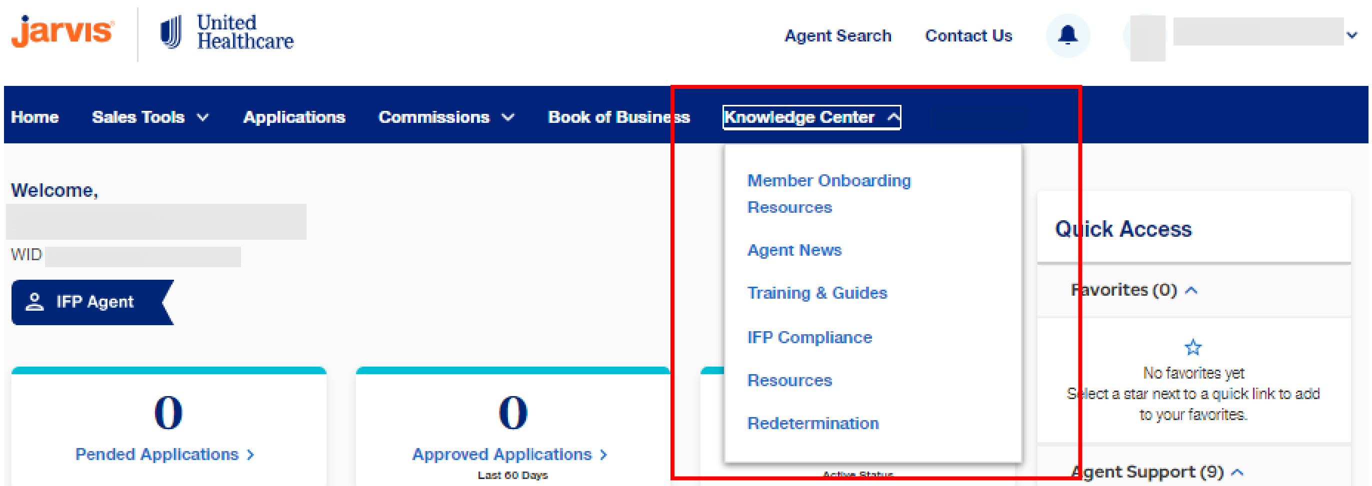


Homepage Access



[Click here](#) to view the Member Profile Page QRG.

Knowledge Center



Member Onboarding Page

- Find resources that are designed to help you proactively serve your clients once their health plan is active

Agent News

- Find communication news articles that contain updates and important information regarding UnitedHealthcare Individual & Family Plans (UHC IFP)

Training and Guides

- Access Agent Training, Commissions Guide, ***Jarvis*** User Guide, Quote and Enrollment Guide, Exchange Agent Guide, and more

IFP Compliance

- Review available resources to ensure you are compliant while selling UHC IFP

Resources

- Find Prescription Drug Lists, Benefit Grids and other helpful forms

Redetermination

- Take advantage of helpful Medicaid redetermination resources to help you prepare with assisting consumers who may lose their Medicaid coverage