



Jarvis Individual and Family Plans User Guide

Updated: October 2024

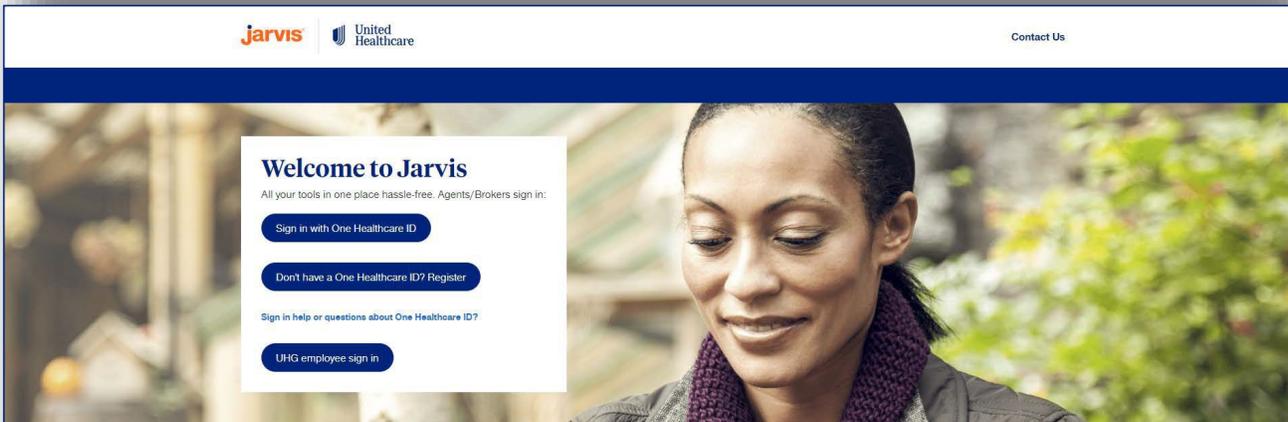




Jarvis User Guide

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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'



Jarvis User Guide

- 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'**



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

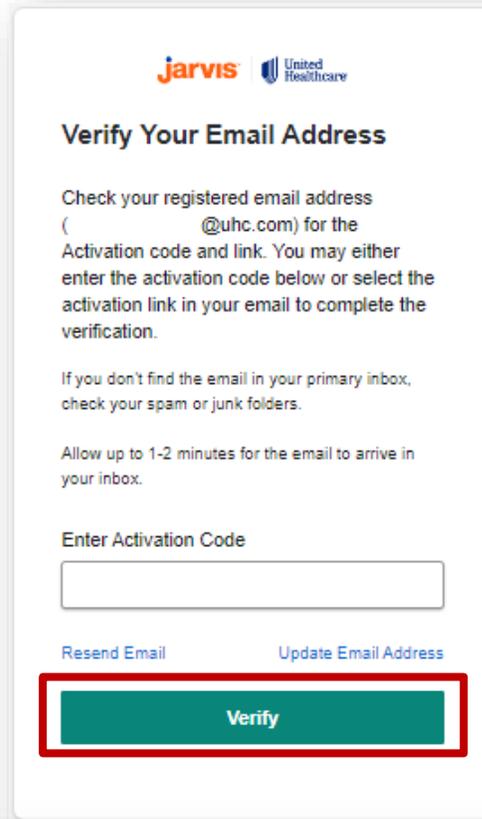
You must agree to the [Terms of Use](#) and [Website Privacy Policy](#) to use the One Healthcare ID service. If you do not agree, click Cancel and do not use any aspect of the One Healthcare ID service.

If you'd like assistance, contact support at **1-866-235-4095** or ACABrokerSupport@uhc.com.

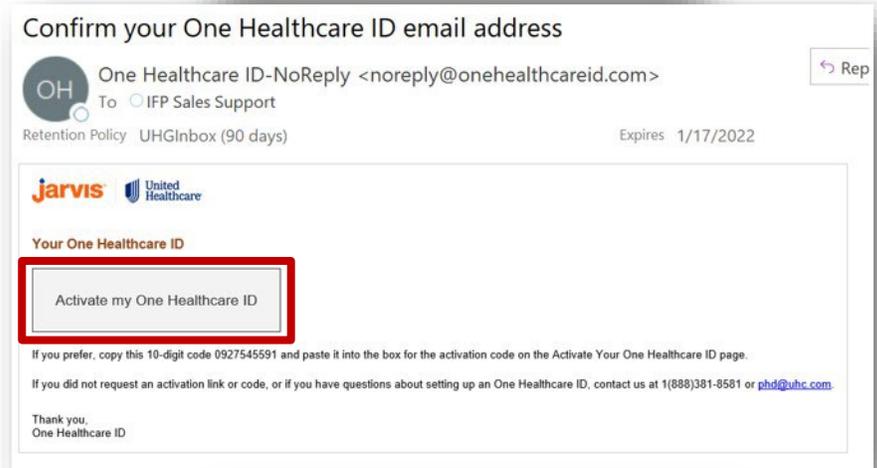


Jarvis User Guide

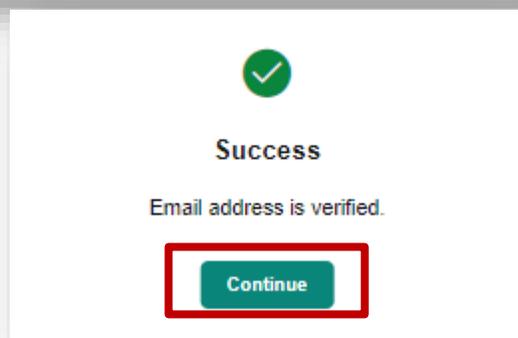
- Once you have clicked **'Continue,'** Jarvis will send an email from noreply@onehealthcareid.com to the address provided.
- Verify your email address to move forward



- 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



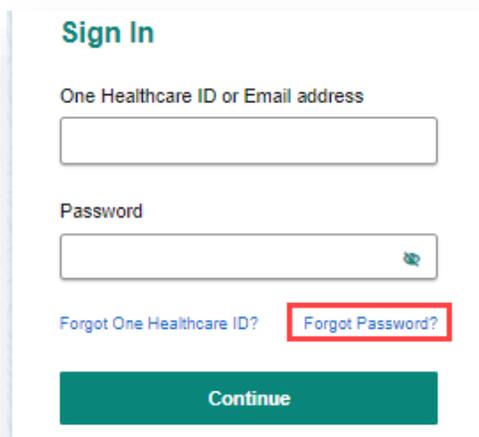
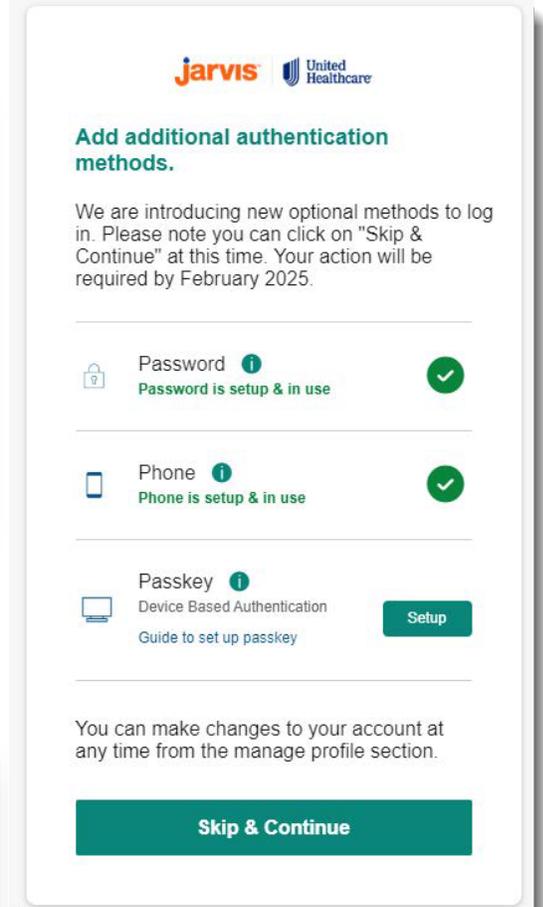
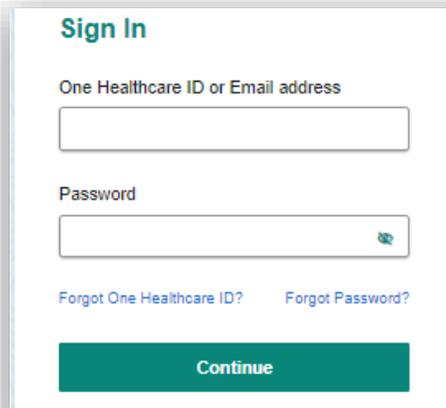
If you'd like assistance, contact support at **1-866-235-4095** or ACABrokerSupport@uhc.com.



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Returning Users:

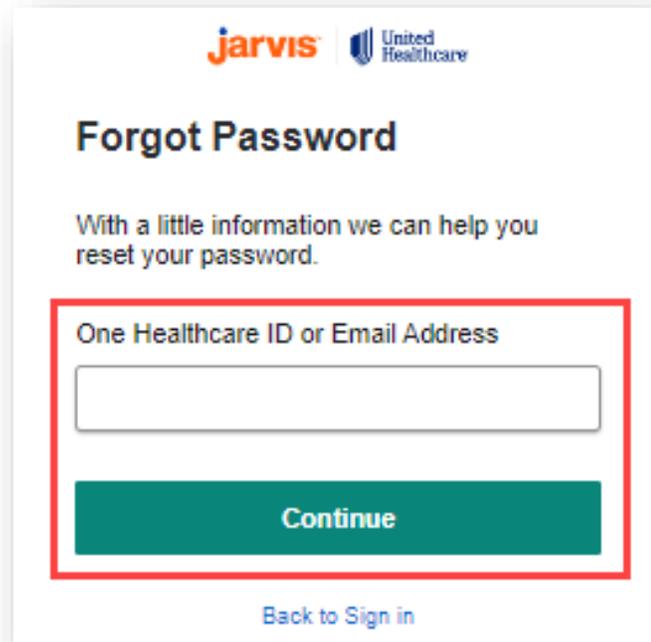
- Go to www.uhcjarvis.com
- Click 'Sign in with One Healthcare ID'
- Use your One Healthcare ID and password to sign in to **Jarvis**
- As an added security enhancement, users will be asked to verify their login by sending a code to their phone or email, but the email option will not be available after 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'



Jarvis User Guide

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



jarvis | United Healthcare

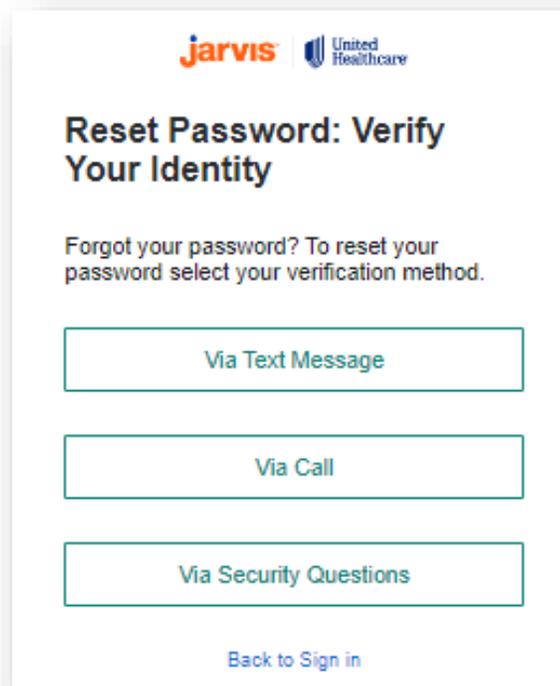
Forgot Password

With a little information we can help you reset your password.

One Healthcare ID or Email Address

Continue

[Back to Sign in](#)



jarvis | United Healthcare

Reset Password: Verify Your Identity

Forgot your password? To reset your password select your verification method.

Via Text Message

Via Call

Via Security Questions

[Back to Sign in](#)



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



Jarvis User Guide

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

The screenshot displays the Jarvis homepage interface. At the top, there are logos for Jarvis and United Healthcare, along with navigation links for 'Agent Search Tool', 'Notification Center', and 'Contact Us'. A 'Toolbar' contains a dropdown menu with options: Home, Sales Tools, Applications, Commissions, Book of Business, and Knowledge Center. The main content area is divided into several sections:

- Welcome, [User Name]**: A personalized greeting with a user profile icon labeled 'IFP Agent'.
- Dashboard Reports**: A grid of six report cards showing metrics like Pending Applications, Approved Applications, UHC Members, Late Payment, Turning 26, and Turning 65.
- Agent News**: A section for news articles, including 'In the Spotlight: Conflict of Interest', 'Did You Know?: Personalize Your Quick ...', and 'Compliance Corner: CMS Consumer Consent ...'.
- Book of Business At-a-Glance**: A table showing a summary of active and inactive members.
- Customizable Quick Access Links**: A sidebar on the right with a 'Quick Access' section containing links for Favorites, Agent Support, Member Onboarding Resources, Provider Search, Quote & Enroll, UHC Agent Toolkit, UHC IFP Training, PHD Inquiry Form, Opt-in to Broker Text Messages, Redetermination, and Pharmacy Locator.
- Contact Information**: A section at the bottom providing 'Need Help?' information, including contact details for the Producer Help Desk (PHD) and links for PHD Chat, English, Espanol, and ACABrokerSupport@uhc.com.



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

The screenshot displays the Jarvis user interface. At the top left, the Jarvis logo and UnitedHealthcare logo are visible. To the right, there are links for 'Agent Search' and 'Contact Us', along with a notification bell icon and a user profile icon. Below the navigation bar, the main content area is divided into several sections. On the left, there is a 'Welcome' message with a user ID and a 'Manage Profile' button. The central area features six dashboard cards: 'Pended Applications' (0), 'Approved Applications' (0, Last 60 Days), 'UHC Members' (1949, Active Status), 'Late Payment' (0), 'Turning 26' (8), and 'Turning 65' (23). Below these cards is an 'Agent News' section with three articles: 'In the Spotlight: PHD Chat on Jarvis', 'Reminder: Conflict of Interest', and 'Book of Business Overview'. On the right side, there is a 'Sign Out' button and a list of resources including 'Sales Marketing Materials', 'Member Onboarding Resources', 'Provider Search', 'Quote & Enroll', 'UHC IFP Training', 'PHD Inquiry Form', 'Opt-in to Broker Text Messages', 'Redetermination', and 'Pharmacy Locator'.



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.

The screenshot displays the Jarvis user interface. At the top left, the Jarvis logo and United Healthcare logo are visible. To the right, there are links for 'Agent Search', 'Contact Us', a notification bell, and a user profile dropdown. Below this is a dark blue navigation bar with links: 'Home', 'Sales Tools', 'Applications', 'Commissions', 'Book of Business', and 'Knowledge Center'. A breadcrumb trail shows 'Home > Knowledge Center > Account Info'. A search bar is present at the top of the main content area. The 'Personal Information' section is highlighted in the left sidebar, with an 'Edit Personal Info' button. The main content area shows a table of personal information with redacted values. Below this is the 'Direct Deposit Information' section with an 'Edit Direct Deposit Info' button and a redacted 'Account Holder' field.

| Personal Information | | Edit Personal Info |
|--------------------------|--------------|--------------------|
| Primary Address | [Redacted] | |
| Contact Phone | [Redacted] | |
| Cell Phone | [Redacted] | |
| Email | [Redacted] | |
| National Producer Number | [Redacted] | |
| Agent ID | [Redacted] | |
| Party ID | [Redacted] | |
| Agent Type | IEX Direct | |
| Contract Status | Active | |
| Agent Level(s) | Direct Agent | |

| Direct Deposit Information | | Edit Direct Deposit Info |
|----------------------------|------------|--------------------------|
| Account Holder | [Redacted] | |

Homepage

Account Information Continued

Licensure & Appointments

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

Agent Search Contact Us   [Redacted]

[Home](#) [Sales Tools](#) [Applications](#) [Commissions](#) [Book of Business](#) [Knowledge Center](#)

[Home](#) > [Knowledge Center](#) > [Account Info](#)

Agent ID: [Redacted]

[Profile](#)

Licensure & Appointments

[Certifications](#)

[Delegated Access](#)

View

All States

| 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.

[Agent Search](#)[Contact Us](#)

[Redacted] ▾

- Home
- Sales Tools ▾
- Applications
- Commissions ▾
- Book of Business
- Knowledge Center ▾

Home > Knowledge Center > Account Info

[Redacted] Agent ID: [Redacted]

Profile

Licensure & Appointments

Certifications

Delegated Access

Current Certifications

| <u>Year</u> ▾ | <u>Certificate Name</u> | <u>Completion Date</u> |
|---------------|---|------------------------|
| 2025 | Federally Facilitated Marketplace Certification | 10/21/24 |
| 2024 | Federally Facilitated Marketplace Certification | 10/19/23 |
| 2023 | Federally Facilitated Marketplace Certification | 10/08/22 |
| 2022 | Federally Facilitated Marketplace Certification | 10/17/21 |

Showing 4 ▾ of 4 < Previous 1 Next >



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

The screenshot displays the Jarvis user interface. At the top, there are logos for Jarvis and United Healthcare, along with navigation links for Agent Search and Contact Us. The main navigation bar includes Home, Sales Tools (which is expanded to show a dropdown menu), Applications, Commissions, Book of Business, and Knowledge Center. The dropdown menu lists: Sales and Marketing Materials, Quote & Enroll, Age-In Details, Off-Exchange, and Agent Compensation Disclosure. The dashboard features several key metrics: Pended Applications (0), Approved Applications (0, Last 60 Days), UHC Members (1953, Active Status), Late Payment (0), Turning 26 (8), and Turning 65 (24). On the right, there is a Quick Access sidebar with Favorites (0) and Agent Support (9). The Agent Support section lists various resources like Sales Marketing Materials (marked as New), Member Onboarding Resources, Provider Search, Quote & Enroll, UHC IFP Training, PHD Inquiry Form, Opt-in to Broker Text Messages, Redetermination, and Pharmacy Locator. The Agent News section at the bottom features three articles: 'In the Spotlight: 2025 Benefit Grids' (Oct 11, 2024), 'Breast Cancer Awareness Month' (Sep 27, 2024), and '2025 IFP Agent Commissions Overview' (Sep 27, 2024).

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.

The screenshot shows the Jarvis UnitedHealthcare website interface. At the top, there are logos for Jarvis and UnitedHealthcare, along with navigation links for 'Agent Search', 'Contact Us', and a notification bell. A dark blue navigation bar contains 'Home', 'Sales Tools' (with a dropdown arrow), 'Applications', 'Commissions', 'Book of Business', and 'Knowledge Center'. The 'Sales Tools' dropdown menu is open, listing: 'Sales and Marketing Materials', 'Quote & Enroll', 'Age-In Details', 'Off-Exchange', and 'Agent Compensation Disclosure'. Below the menu is a large banner image of a woman in a white shirt and headset, smiling at a computer. The text 'Individual & Family Plans Sales and Marketing Materials' is overlaid on the image. Below the banner, a welcome message reads: 'Welcome to UnitedHealthcare Individual & Family Plans Sales and Marketing Materials page. Here, you will find materials for prospecting new clients, engaging with current UHC IFP members, and event support items.' Three state selection boxes are visible, each with a dropdown arrow: 'National', 'Arizona', and 'Colorado'.

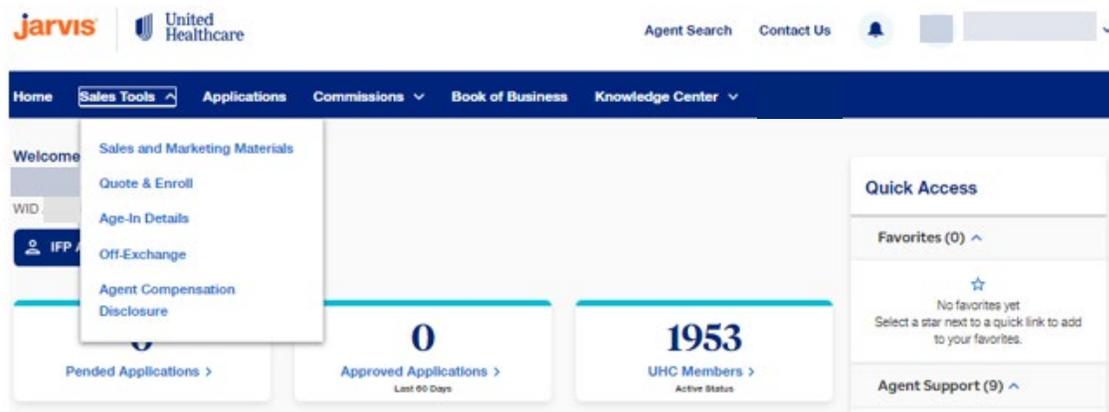
Sales Tools

Quote and Enroll

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

What is the Quote and Enroll tool?

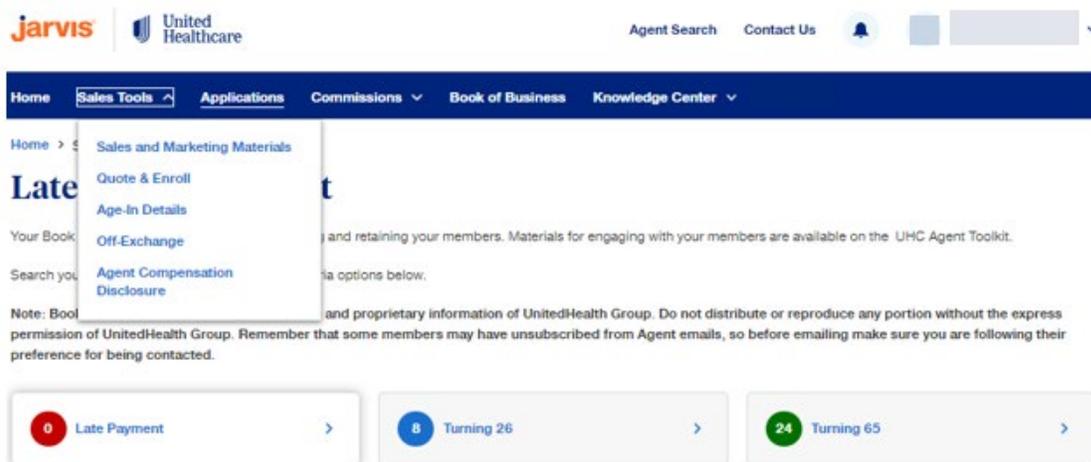
- User-friendly platform to quickly browse through available health insurance plan options
- Process applications, submit follow-ups and track statuses
- Synced with [healthcare.gov](https://www.healthcare.gov)



[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.



Jarvis User Guide

Sales Tools

Agent Compensation Disclosure

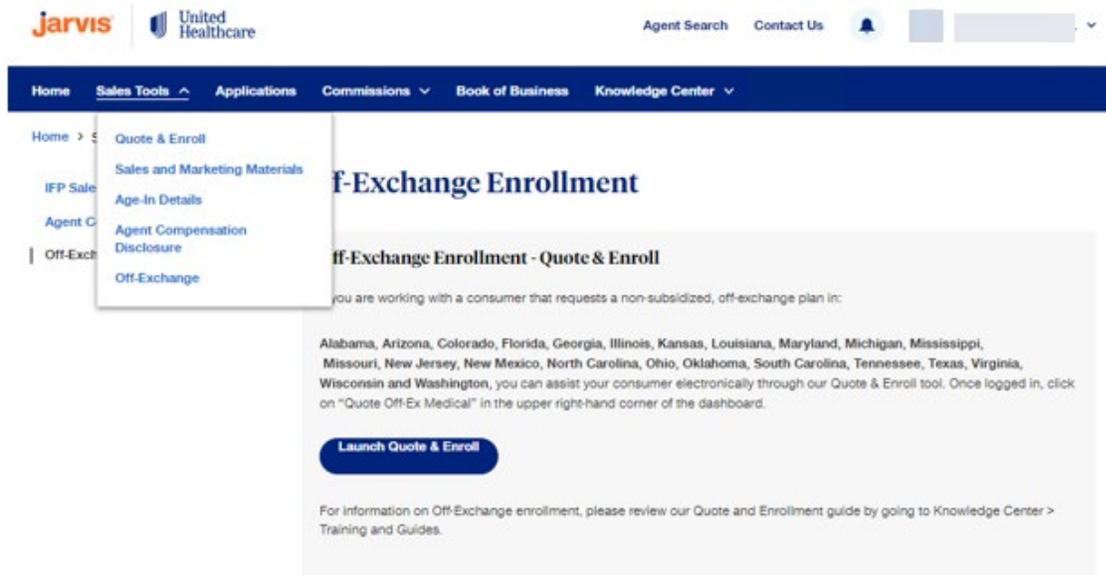
Agent Compensation Disclosure – Here, you can find resources regarding the agent/broker compensation disclosure requirements, including talking points and FAQs.



[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.



Agent Search

Contact Us



Home Sales Tools ▾ Applications Commissions ▾ Book of Business Knowledge Center ▾

Home > Applications

Application Status

To assist with your search please use the tips below:

- Activity within the last 60 days is displayed below; you can also search any 1-12 month range in the past to access previously submitted applications.
- If an applicant isn't visible, consider narrowing your search by name, date, ID number, or state.
- It may take up to three business days for applications to appear on Jarvis after submission. For assistance beyond this time-frame, contact the PHD.
- If an application was approved and then canceled, the Application Status page will not reflect the cancellation.

No records were found. Please revise your entry and try your search again.

Agent Id

Agent Name

Agent ID ⓘ

Show applications received between: ⓘ

and

Search

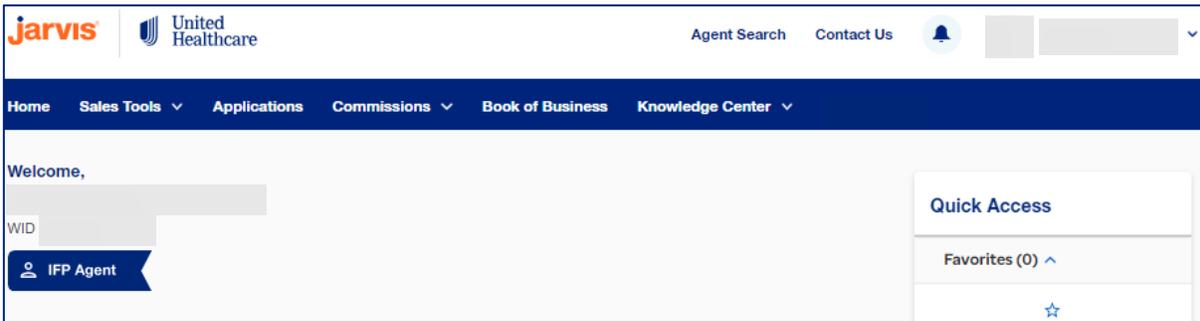
CLEAR



[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

Search using agent writing ID, agent name, member number, member name, or use a combination of all to refine your results.

Search Type **Report Type**

Agent Effective Date

Agent

ID Name

ID *

Between (3-month period)

OCTOBER 2024 and OCTOBER 2024

SEARCH **CLEAR**

- 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.

Download your statement in your preferred format. An Excel report returns a maximum of 65,536 records. If your Excel statement reaches this limit please pull a Text report. A PDF report returns a maximum 15,000 records. A Text report has no limit to the number of records returned.

Year: Month: 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.

Agent ID: Report Type:

Between: and



[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.



Home > Book of Business

Book of Business

Your Book of Business is available to aid you in serving and retaining your members. Materials for engaging with your members are available on the [UHC Agent Toolkit](#).

Search your desired member list by using the criteria options below.

Note: Book of Business Reports are confidential and proprietary information of UnitedHealth Group. Do not distribute or reproduce any portion without the express permission of UnitedHealth Group.

Displayed results have a max limit of 500. To view all results, downloading book of business is recommended.



[Click here](#) to view 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.

The screenshot shows a member profile page. At the top, it displays 'Plan UHC Gold Standard S0 Indiv Ded' and 'Plan Code G0000074'. Below this is a table with columns: 'Plan Status Desp' (Active with a green checkmark), 'Date Of Birth', 'Member Number', and 'Agent Of Record'. Underneath are three tabs: 'Member Information' (selected), 'Application Details', and 'Commission Details'. The 'Member Information' tab contains three panels: 'Quick Links' with links for 'Member ID Card', 'Change Provider', 'Submit Member Escalation Form', and 'Member Escalation Status'; 'Contact Information' with fields for 'Primary Phone Number', 'Email', 'Permanent Address', 'Mailing Address', and 'Authorized Representative'; and 'Premium Status' with fields for 'Premium Amount', 'Payment Method', and 'Past Due Amount'. At the bottom, there is a 'Current Primary Care Provider' section with a table showing 'Provider Name', 'Plan Effective Date' (2023-01-01), and 'PCP Effective Date' (2024-05-23). To the right of this table is a '-Select Plan-' dropdown and a 'Change Provider' button.

Jarvis User Guide

Book of Business

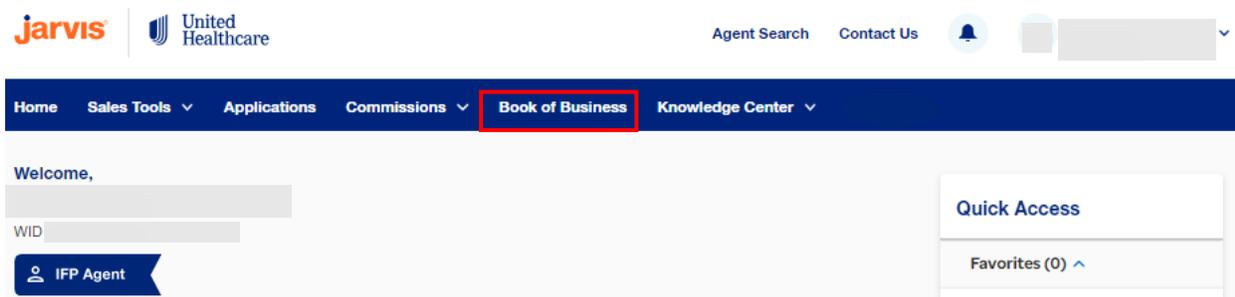
Member Profile Page Continued

The Member Profile Page can be accessed through two ways:

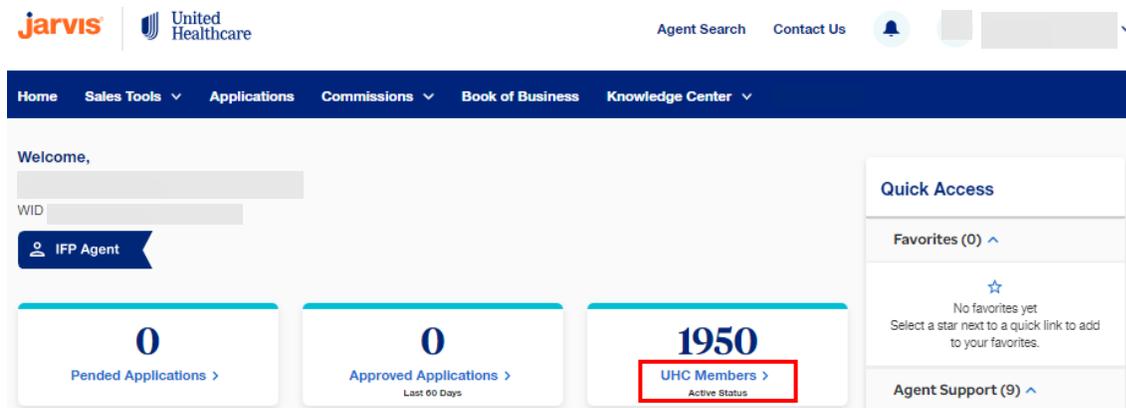
1. The Book of Business tab
2. Jarvis homepage by clicking 'UHC Members'

Both access options are pictured below.

Book of Business Tab Access



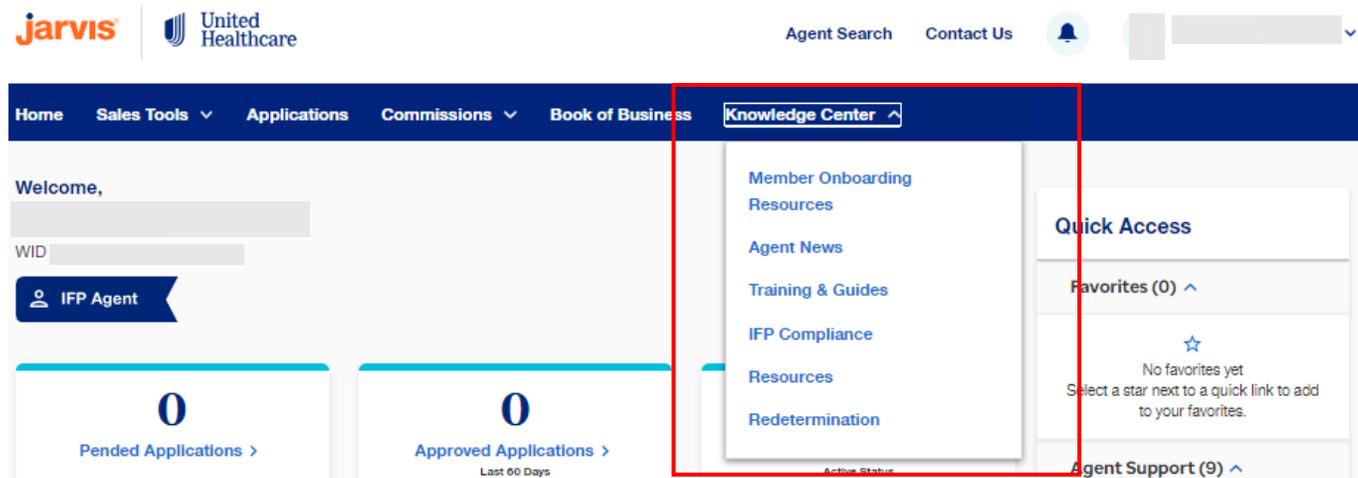
Homepage Access



[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

