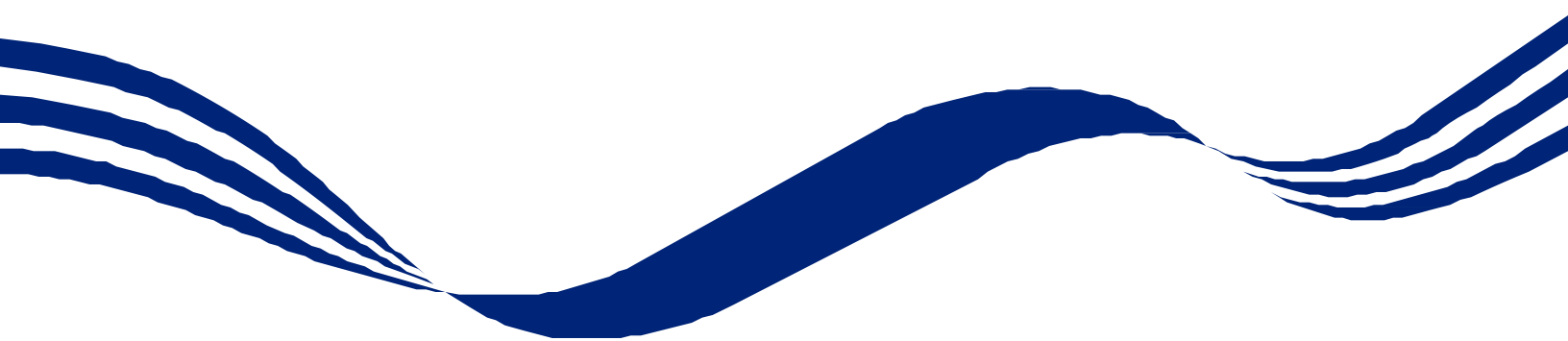




Jarvis Telesales User Guide – IFP

Updated: April 2025 for Telesales

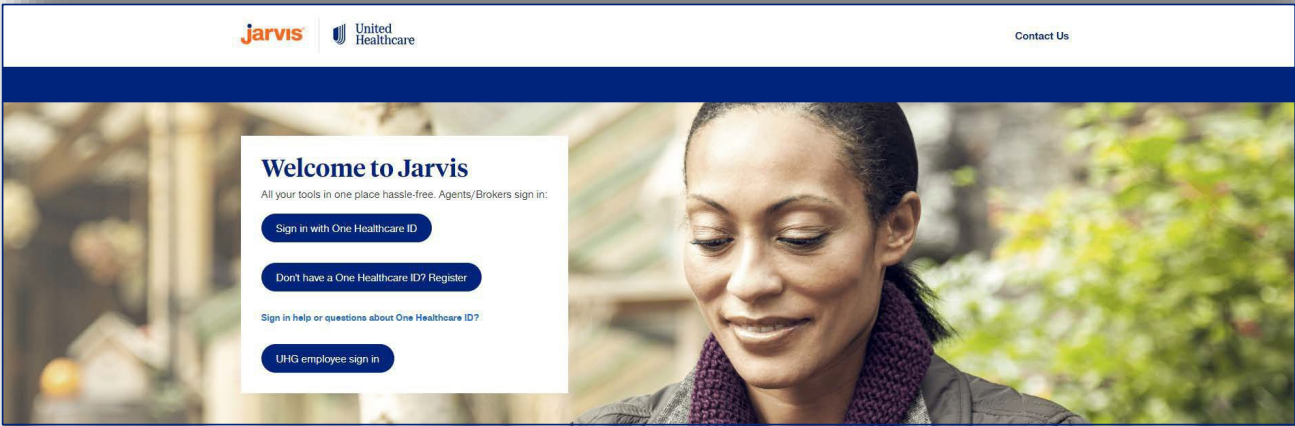




Jarvis Telesales User Guide

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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
- 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

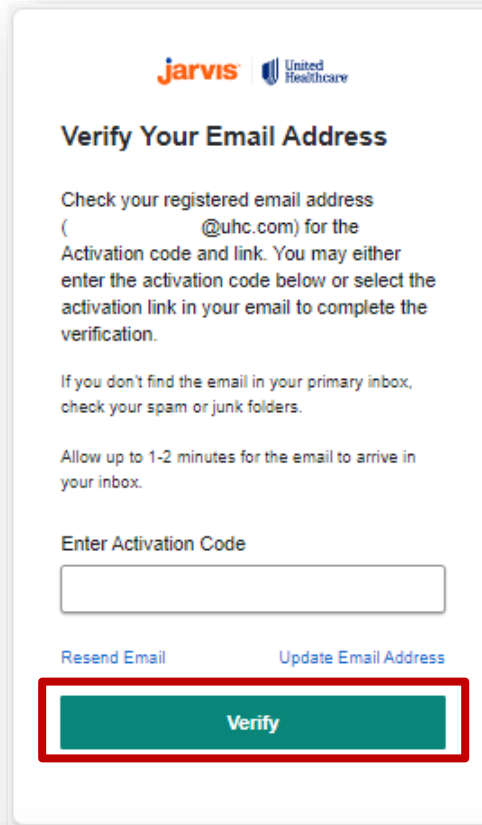
You must agree to the [Terms of Use](#) and [Website Privacy Policy](#) to use the One Healthcare ID service. If you do not agree, click Cancel and do not use any aspect of the One Healthcare ID service.

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



Jarvis User Guide

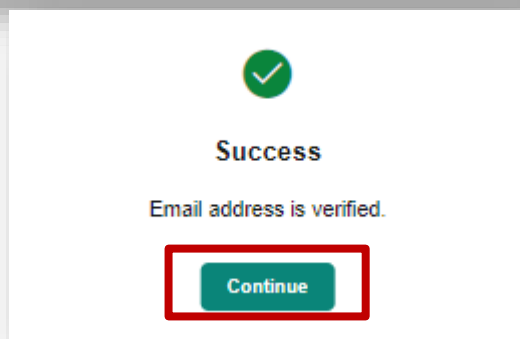
- Once you have clicked '**Continue**,' Jarvis will send an email from noreply@onehealthcareid.com to the address provided.
- Verify your email address to move forward
- Enter the Activation Code sent to the email address entered during registration. Click on Verify button



- 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.



Jarvis User Guide

Returning Users:

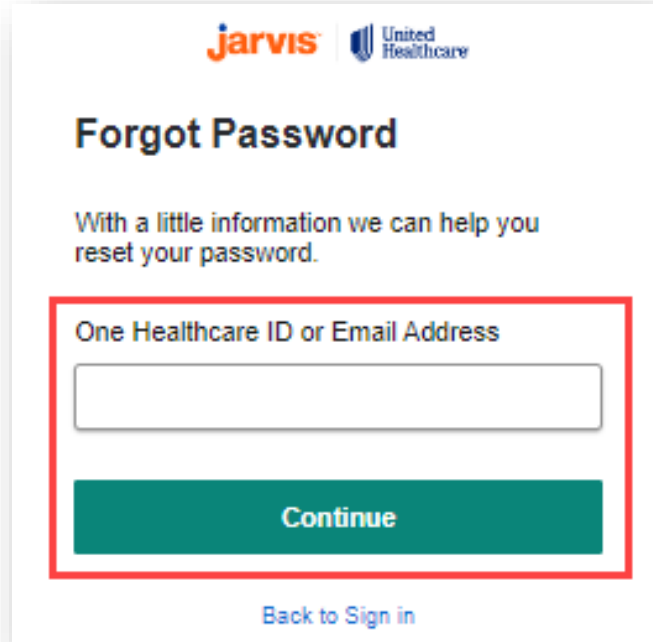
- Go to www.uhcjarvis.com
- Click **'Sign in with One Healthcare ID'**
- Use your One Healthcare ID and password to sign in to **Jarvis**
- As an added security enhancement, users will be asked to verify their login by sending a code to their phone or email, but the email option will not be available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

The image shows the 'Sign In' form. It has two input fields: 'One Healthcare ID or Email address' and 'Password'. Below the password field, there are links for 'Forgot One Healthcare ID?' and 'Forgot Password?'. At the bottom, there is a green 'Continue' button.The image shows the 'Sign In' form, similar to the one above. However, the 'Forgot Password?' link is highlighted with a red box.The image shows the 'Add additional authentication methods' screen. It has the Jarvis and United Healthcare logos at the top. Below the title, it says 'We are introducing new optional methods to log in. Please note you can click on "Skip & Continue" at this time. Your action will be required by February 2025.' There are three sections: 'Password' (with a checkmark and 'Password is setup & in use'), 'Phone' (with a checkmark and 'Phone is setup & in use'), and 'Passkey' (with a 'Setup' button and 'Device Based Authentication Guide to set up passkey'). At the bottom, there is a green 'Skip & Continue' button.

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

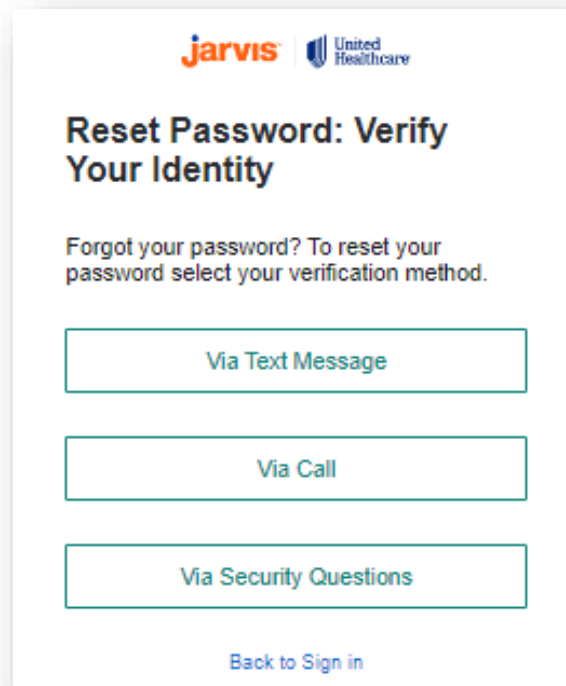
Forgot Password

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

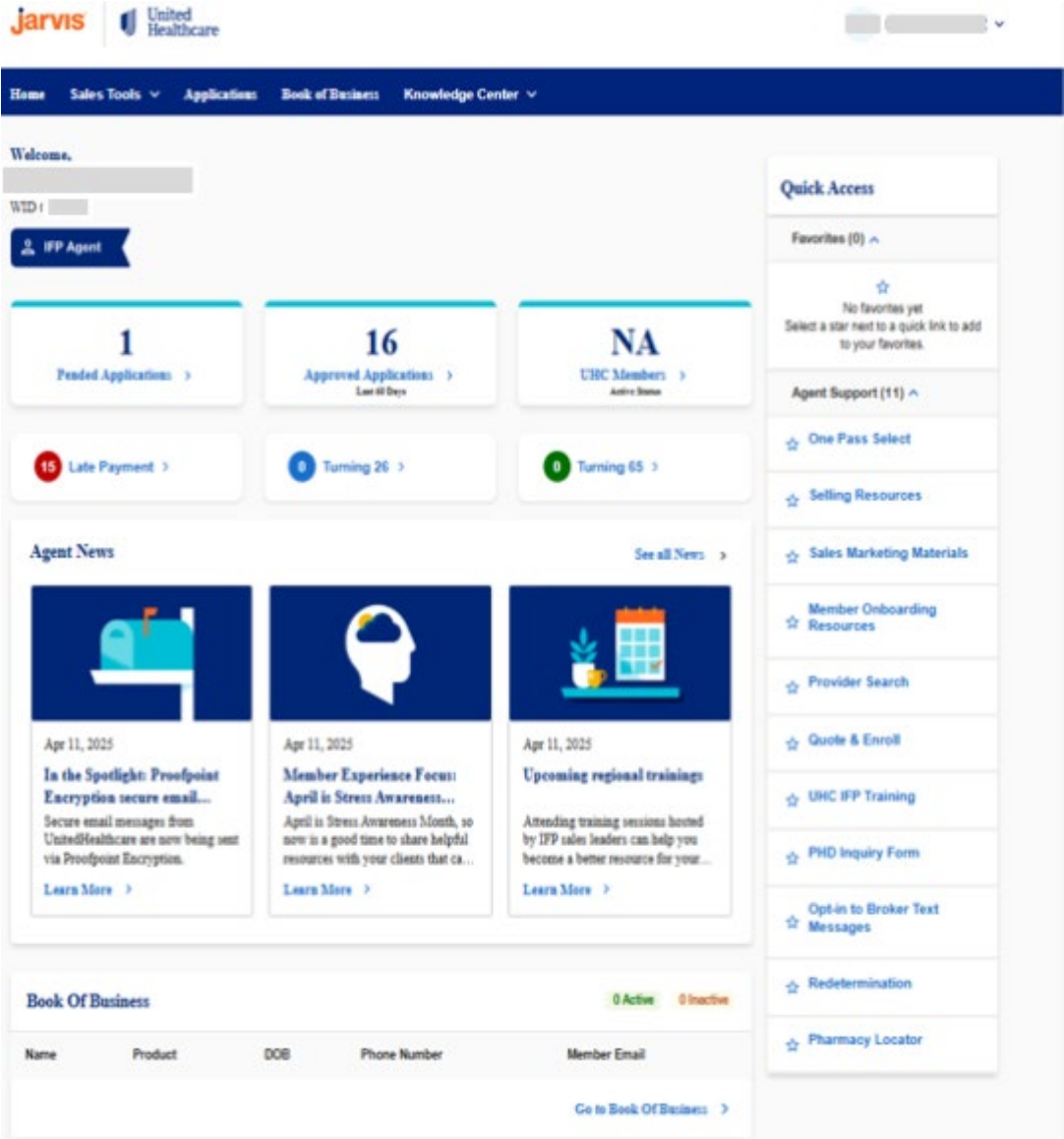
Homepage

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
- Access your account information by clicking your name in the top-right corner



Jarvis User Guide

Homepage

Account Information

Account information can be accessed from the homepage by clicking on **Manage Profile** button from 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
- View Federally-facilitated Marketplace certification status

The screenshot displays the Jarvis User Guide homepage. At the top, the Jarvis and United Healthcare logos are visible. A navigation bar includes links for Home, Sales Tools, Applications, Book of Business, and Knowledge Center. A user profile dropdown menu is open, showing the 'Manage Profile' button highlighted with a red box and a 'Sign Out' button. The main content area features a welcome message, a user ID, and a role indicator 'IFP Agent'. Below this, there are six summary cards: '1 Pending Applications', '16 Approved Applications', 'NA UHC Members', '16 Late Payment', '0 Turning 26', and '0 Turning 65'. An 'Agent News' section follows, with three articles dated April 11, 2025, covering Proofpoint encryption, Member Experience Focus, and upcoming regional trainings. On the right, a 'Quick Access' sidebar lists various resources like Favorites, Agent Support, One Pass Select, Selling Resources, Sales Marketing Materials, Member Onboarding Resources, Provider Search, Quote & Enroll, UHC IFP Training, PHD Inquiry Form, and Opt-in to Broker Text Messages.



Jarvis User Guide

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.

Jarvis

United Healthcare

Home

Sales Tools

Applications

Book of Business

Knowledge Center

Home

Knowledge Center

Account Info

Agent ID:

Profile

Licensure & Appointments

Certifications

Personal Information

Edit Personal Info

Primary Address

Contact Phone

*****4635

Cell Phone

*****4635

Email

mar*****@uhc.com

National Producer Number

Agent ID

Party ID

Agent Type

IEX Telesales

Contract Status

Active

Agent Level(s)

Telesales Agent

Direct Deposit Information

Edit Direct Deposit Info

Jarvis User Guide

Homepage

Account Information Continued

Licensure & Appointments

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

Jarvis | United Healthcare

Home Sales Tools Applications Book of Business Knowledge Center

Home > Knowledge Center > Account Info

Agent ID:

Profile View
Licensure & Appointments All States Results per page 15
 Certifications

State	Licensed	Lic Exp Date	Appointed	Licensed & Appointed
Alabama	Yes	03/29/2027	Yes	Yes
Alaska	No	NA	No	No
Arizona	Yes	03/29/2026	Yes	Yes
Arkansas	No	NA	No	No
California	No	NA	No	No
Colorado	Yes	03/29/2026	Yes	Yes
Connecticut	No	NA	No	No
Delaware	No	NA	No	No



Jarvis User Guide

Homepage

Account Information Continued

Certifications

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

Home

Sales Tools

Applications

Book of Business

Knowledge Center

Home

Knowledge Center

Account Info

Agent ID

Profile

Licensure & Appointments

Certifications

Current Certifications

Results per page 15

Year	Certificate Name	Completion Date
2025	Federally Facilitated Marketplace Certification	08/05/2024
2024	Federally Facilitated Marketplace Certification	08/30/2023
2023	Federally Facilitated Marketplace Certification	08/17/2022
2022	Federally Facilitated Marketplace Certification	08/17/2022

Showing 1-4 of 4 results

< Previous

1

Next >

Jarvis User Guide

Sales Tools

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

- Sales and Marketing Materials
- Quote and Enroll tool
- Age-In Details
- Off-Exchange and ICHRA information

The screenshot displays the Jarvis user interface. At the top, the Jarvis and United Healthcare logos are visible. The navigation bar includes links for Home, Sales Tools, Applications, Book of Business, and Knowledge Center. The Sales Tools dropdown menu is open, showing four options: Sales and Marketing Materials, Quote & Enroll, Age-In Details, and Off-Exchange and ICHRA. Below the navigation bar, there are several dashboard cards: Pending Applications (1), Approved Applications (16), UHC Members (NA), Late Payment (15), Turning 26 (0), and Turning 65 (0). On the right side, there is a Quick Access section with a Favorites list (0) and an Agent Support list (11) containing links like One Pass Select, Selling Resources, Sales Marketing Materials, Member Onboarding Resources, Provider Search, Quote & Enroll, UHC IFP Training, PHD Inquiry Form, and Opt-in to Broker Text Messages. At the bottom, there is an Agent News section with three articles dated April 25, 2025, including 'In the Spotlight: United Health Foundation...', 'Did You Know?: Delegated Access', and 'Sales & Marketing Materials Feature: Ongoing member...'. Each article has a 'Learn More' link.

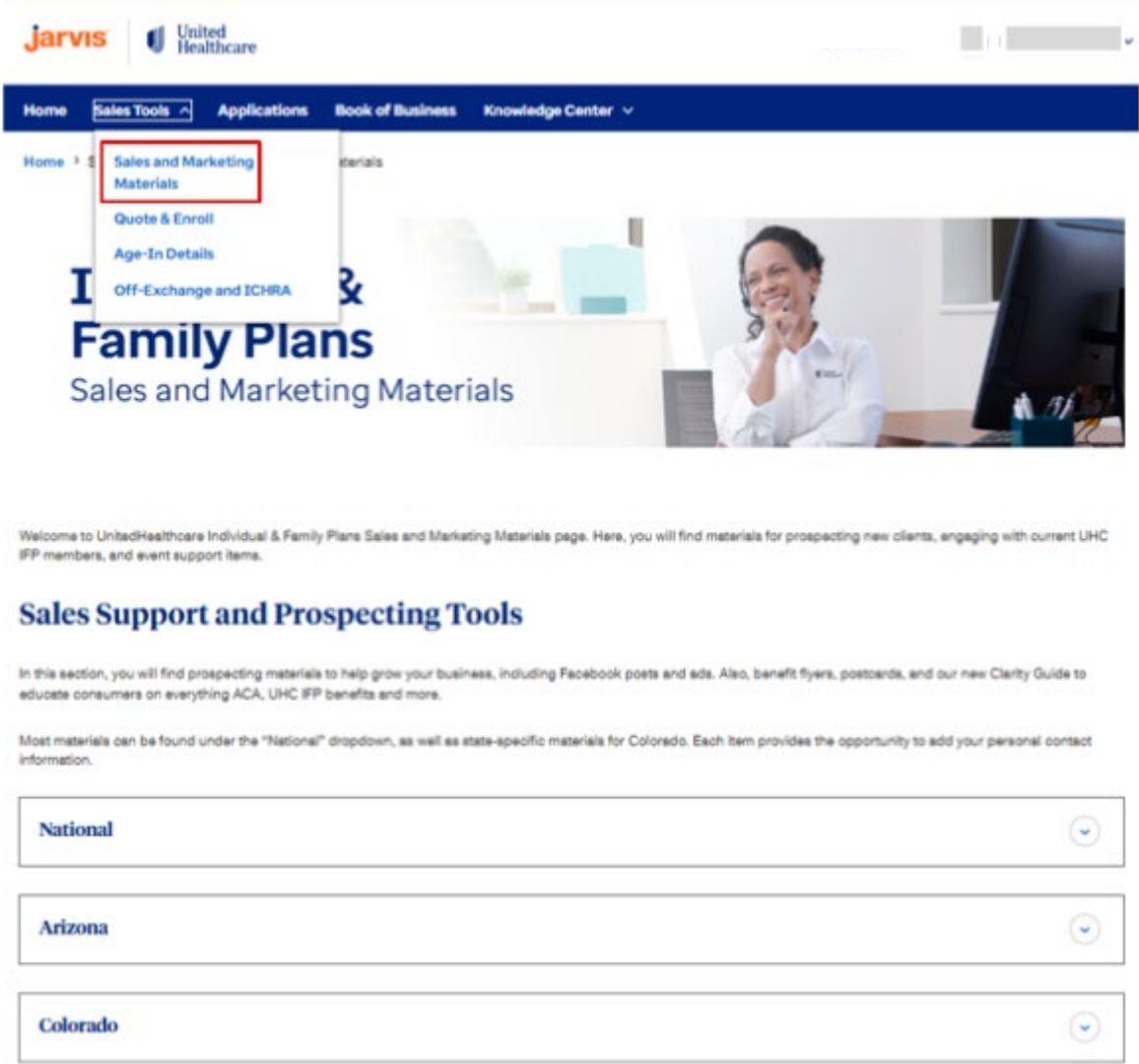


Sales Tools

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.



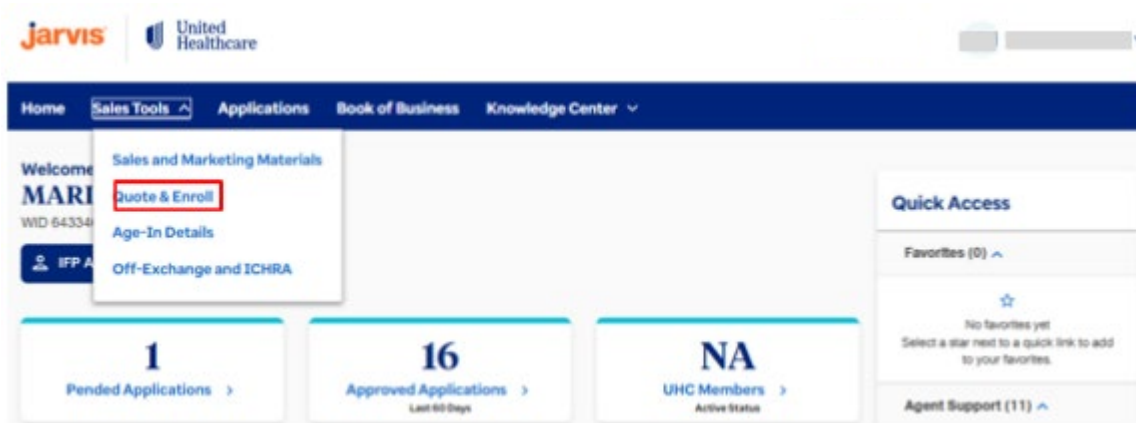
Sales Tools

Quote and Enroll

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

What is the Quote and Enroll tool?

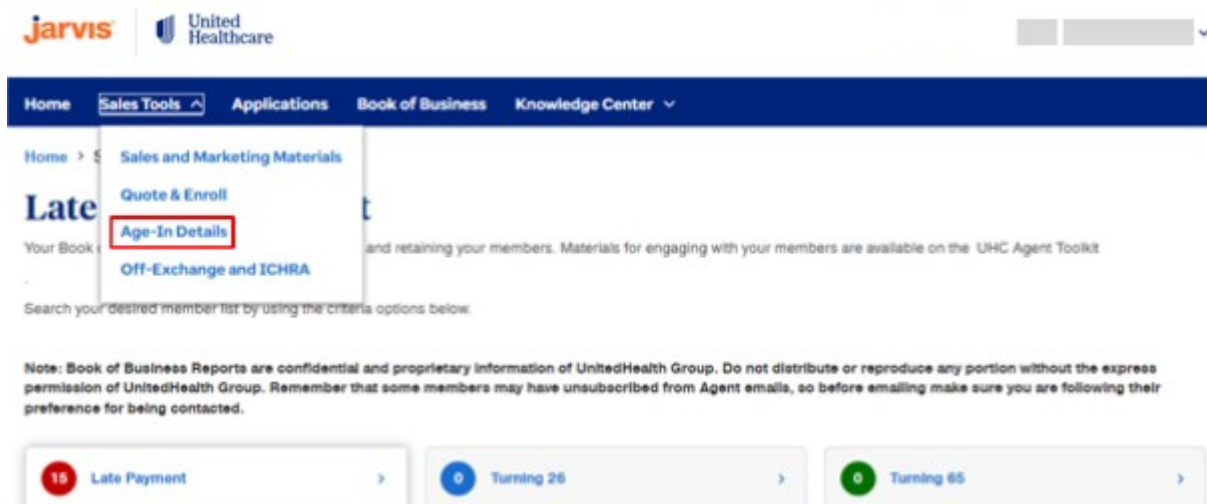
- User-friendly platform to quickly browse through available health insurance plan options
- Process applications, submit follow-ups and track statuses
- Synced with healthcare.gov



[Click here](#) to view the Quote and Enrollment Guide.

Age-In Details & Late Payment Report

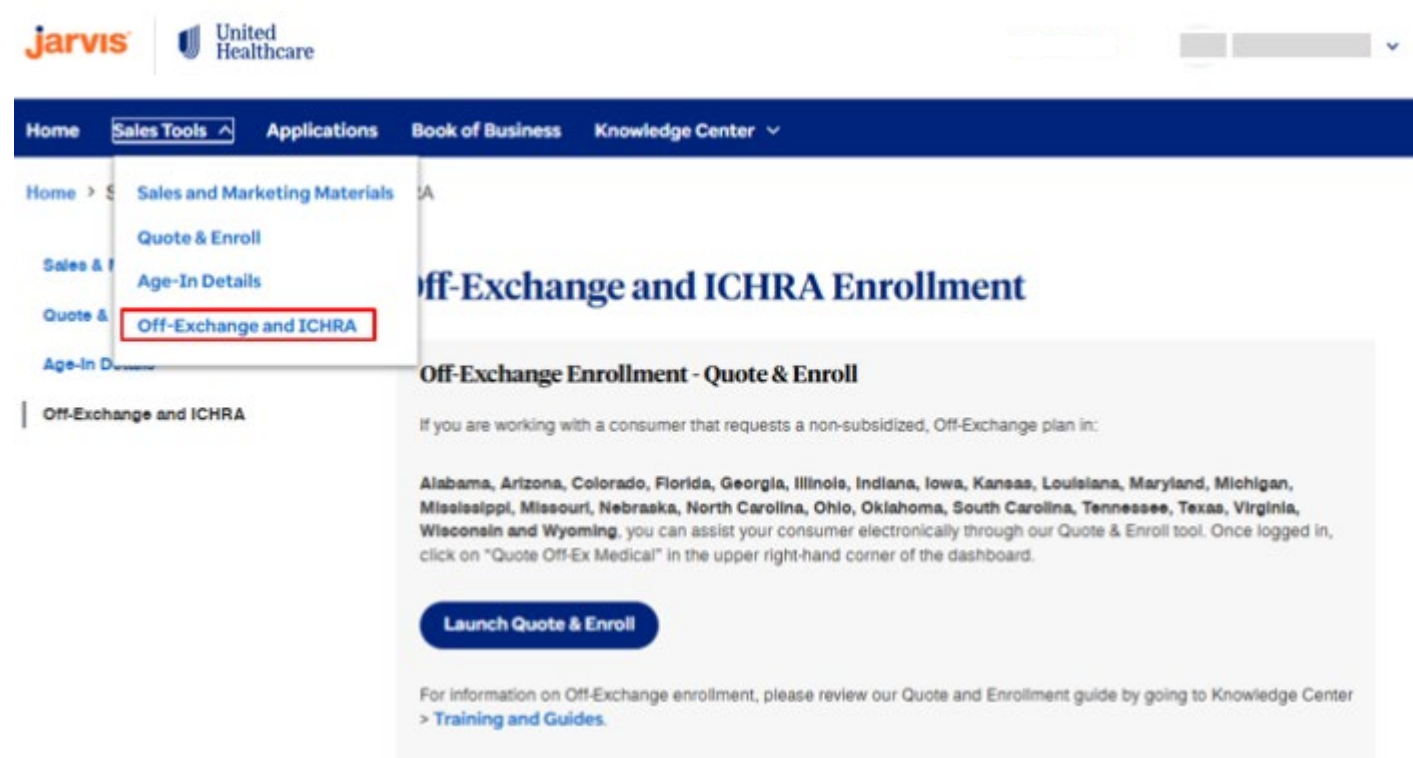
Age-In Details & Late Payment Report – Here, you can quickly and easily identify your clients who may need additional support due to age-related changes to coverage. You can also identify clients who may be missing their monthly premium payment by viewing the late payment report.



Sales Tools

Off-Exchange and ICHRA

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



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

Jarvis User Guide

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.

The screenshot shows the Jarvis United Healthcare website's "Applications" section. The navigation bar includes Home, Sales Tools, Applications (highlighted), Book of Business, and Knowledge Center. Below the navigation bar, there's a breadcrumb trail: Home > Applications. The main heading is "Application Status". A tip states: "To assist with your search please use the tips below:" followed by three bullet points about search scope, visibility, and cancellations.

Below the tips, there are two tabs: "Agent Id" (selected) and "My IDs". Under the "Agent Id" tab, there's a label "Agent ID" with a help icon, followed by a text input field containing "6433465" and a clear button (X). Below this, it says "Show applications effective between:" with a help icon, followed by two date pickers set to "02/28/2025" and "07/29/2025", separated by the word "and". There are "Search" and "CLEAR" buttons.

Under the "Filter By:" section, there are three filter categories: "Name", "ID Number", and "State". The "Name" category has "First Name" and "Last Name" fields, both containing "XXXXXXXXXX". The "State / US Territory" dropdown is set to "select". There are "FILTER" and "CLEAR" buttons at the bottom.




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

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.

jarvis



Home

Sales Tools

Applications

Book of Business

Knowledge Center

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 [Sales And Marketing Materials](#)

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, 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.

Plan UHC Gold Standard \$0 Indiv Ded Plan Code G0000074

Plan Status Desp

Date Of Birth

Member Number

Agent Of Record

Active

Member Information

Application Details

Quick Links

Member ID Card

Change Provider

Submit Member Escalation Form

Member Escalation Status

Contact Information

Primary Phone Number:

Email:

Permanent Address:

Mailing Address:

Authorized Representative:

Premium Status

Premium Amount:

Payment Method:


Past Due Amount:

Current Primary Care Provider

Provider Name

Plan Effective Date

PCP Effective Date



2023-01-01

2024-05-23

Select Plan

Change Provider

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

jarvis

United Healthcare

Home

Sales Tools

Applications

Book of Business

Knowledge Center

Home > Book of Business

Book of Business

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Homepage Access

jarvis

United Healthcare

Home

Sales Tools

Applications

Book of Business

Knowledge Center

Welcome,

WID

IFP Agent

1

Pended Applications

16

Approved Applications

Last 60 Days

NA

UHC Members

Active Status

Quick Access

Favorites (0)

No favorites yet
Select a star next to a quick link to add to your favorites.

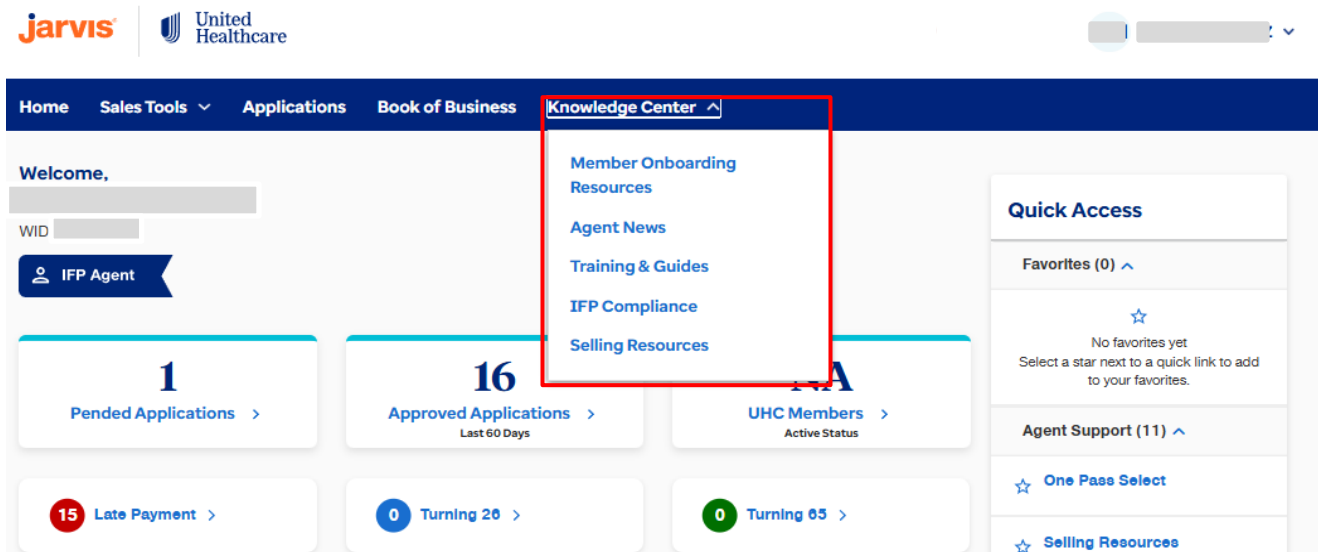
Agent Support (11)



[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, blank 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

