Book of Business Report

Frequently Asked Questions

The Book of Business Report offers an opportunity for agents to view a list of their active and inactive members with UnitedHealthcare Individual and Family Exchange Plans.

What qualifies me to receive a book of business report?

- You must have an active Party ID (PID)
  - The report will pull from your PID, so any active/inactive sales under your PID will show on the book of business report
  - If you get a new Agent ID (writing number), your book of business report will still show all active/inactive accounts connected to your PID
- You must have an active Agent ID (writing number)
- You must have a Agent, Direct Agent, FMO, or GA contract or be a Solicitor rolling up to one of these agent types

The book of business report is only available to the writing agent. At this time, the book of business report is not available for eAlliance and Telesales agents.

What's included in my book of business report?

The book of business report includes:

1. Active members
2. Inactive members (will remain on the report for 90 days)

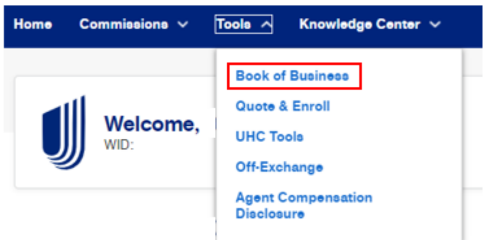
Note: The report may not include members enrolled prior to 2022 or members moved to UnitedHealthcare as part of an acquisition.

How do I open my book of business report?

There are two ways to access your book of business report.

1. From the Jarvis homepage, click directly on ***'See Book of Business'*** from the welcome banner.

2. From the navigation ribbon, click **Tools > Book of Business.**



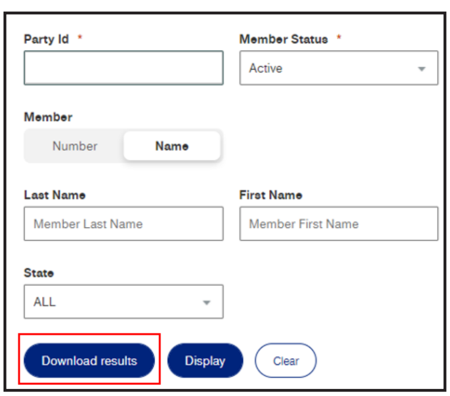
Will the book of business report pull from my Agent ID, PID, or both?

The book of business report will include information for all Agent IDs associated with a PID if an Agent ID is not categorized as Telesales or eAlliance.

How do I export or download my book of business?

You can export your book of business to an Excel file to see all policy details for your book. Simply click on the blue ***'Download Results'*** button at the bottom of the page. Once you export, it may take a few seconds to download the file.

Note: To view a complete list of members, click the ***'Download Results'*** button for both active and inactive statuses.



How often is the book of business report updated?

The book of business report is updated weekly.

Can I search for members by name or member number in my book of business?

Yes, you can search for members by using either the first and last name or the member number.

Member Name:
Click on **'Name'** to search by last name only, first name only, or by both last and first name.

Reminder: Searching by last name does not guarantee all members presented in search results are related to one policy.

Member Number:
Click on **'Member Number'** and enter the member's policy number to search.

Note: When entering the 11-digit policy number in the 'Member Number' field, include the 9-digit subscriber ID and the two-digit suffix (e.g., 12345678901). The first 9 digits (123456789) are the subscriber ID found on the Member ID card, and the two-digit suffix (01) indicates the specific member on the policy.

The two-digit suffix will vary if there is more than one member on a policy to represent each member:

- Primary Member - 123456789**01**
- Member 2 - 123456789**02**
- Member 3 - 123456789**03**
- Member 4 - 123456789**04**

Why might a member not display in my book of business report?

- The member's plan has not yet become effectuated – wait until after the plan effectuates and pull another report
- The member moved to UnitedHealthcare as part of an acquisition – this member will not appear in the report

How do Open Enrollment Period (OEP) applications impact my book of business report?

Any applications written during OEP will appear on your book of business report after they have effectuated.

Note: You may see a future effective date for current members who are being mapped automatically into a new plan for the upcoming year.

Can I see my recently submitted applications?

You will be able to see your recently submitted applications once they are effectuated.

The exception would be if the plan you are selling the application for is not in existence until January 1. Then, you will not see those members until the January 1 effective date. If the plan was in existence the year prior, the application will show as soon as it is effectuated.

Why doesn't my book of business report match my commissions statement?

The book of business report is intended to assist in member engagement and should not be considered a complete representation of the membership on which you're paid. There are a few reasons why there may not be a perfect match:

- The member's plan has not yet effectuated
- The member moved to UnitedHealthcare as part of an acquisition
- The application was sold when you were a Telesales agent or Solicitor

The report may include members that are not on your monthly commissions statement, and that may be because the app was non-commissionable, or, because the report includes members that are inactive for 90 days.

How do I determine if I'm being paid for a member within my book of business report?

Use the Commissions Search within Jarvis. The search can be found on the global navigation ribbon; click **Commissions > Commissions Search.**

What do each of the statuses in my book of business mean?

- **Active:** Member enrollment has effectuated as of the date the data is pulled.
- **Inactive:** Member is termed on any date prior to the date the data is pulled.

Note: You can download your active members and view the termination date and description. If the termination date is greater than the date the data is pulled, the member will show active until that termination date is reached.

Can agency principals see their downline reporting?

Not at this time.

I am unable to open my book of business report on my Apple device. How can I fix this?

You must use Safari on Apple mobile devices for the book of business download button to work. Chrome will not work on Apple mobile devices.

May I contact a person who is not on the list?

Permission to Contact (PTC) rules apply. You must follow all federal and state regulations and UnitedHealthcare policies and procedures related to PTC. Refer to the Agent Guide, available on **Jarvis > Knowledge Center > Training.**

United Healthcare

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