2026 Agent Quick Reference Guide

Book of Business

What is the Book of Business?

Book of Business is conveniently located in Jarvis and gives you access to your member information, helping unlock the full potential of your business. From member data listings to in-depth reports, this tool helps you boost retention, optimize marketing strategies and meet your sales goals.

Key Features

These features help you more easily identify members and manage your book of business based on your needs.

- Access contact information, payment method information, application completion details and premiums (also available for AARP Medicare Supplement Plans).
- Start a Medicare Advantage or Prescription Drug Plan application and auto-populate the member's profile information, a time-saving feature for plan changes.
- Act on behalf of the member to change the Primary Care Provider, request a new, printed UnitedHealthcare UCard® for all plans, submit and track a member escalation, and more.

What's New?

- ★ Download a detailed report of members by clicking the **Download** button and selecting additional columns to include in your report.
- ★ Customize your view by clicking the **Sort by** button to sort your columns and/or by clicking the **Columns** button to select column preferences.
- ★ Effortlessly **filter** your member list by key identifiers such as Member Information, Product, Plan Name and more.
- ★ Search for members under the **Member Information** filter. You can search your entire book for members (not limited to 500).

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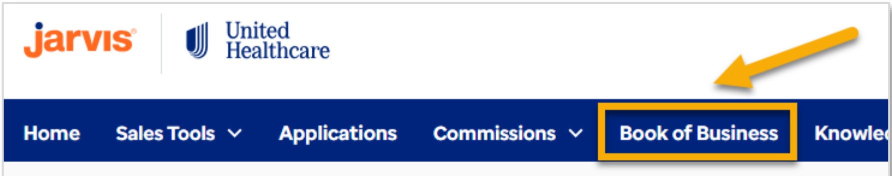
How to Access

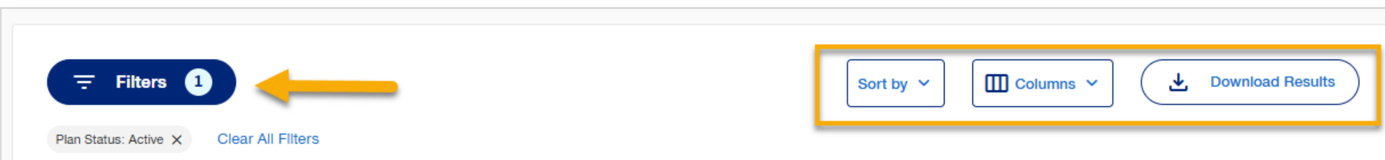
In Jarvis, you'll find "Book of Business" conveniently located in the navigation bar. Simply click on the tab.



Functionality

The Book of Business updates daily.

- Use the **Filters** to filter down to active or inactive members, the product they are enrolled in and their member information (MBI, Last Name or First Name).
- Use the **Sort by** to place the members in alphabet order, product type, or effective dates, and more!
- Include additional information to display by selecting **Columns**, such as DOB and Address.
- Click **Download Results** to download what you included within your filtering or what you have displayed. Reports will only include members whose plan effective date has already begun.



Note: Any applications written during AEP will appear on your Book of Business report after the plan effective date. New Medicare Advantage members appear 1-2 weeks after CMS approval.

Book of Business Specifics

- ✓ You must have an active Agent ID (writing number). If you get a new Agent ID, your Book of Business will still show all active/inactive accounts connected to your PID.
- ✓ If you receive a paper check for commissions, you will have a Book of Business, but your members won't show until their plan becomes effective, and your paper check is issued.
- ✓ The Book of Business report will include information for all Agent IDs associated with an active Party ID unless the Agent ID is categorized as Direct-to-Consumer or Solicitor.
- ✓ The Book of Business Reports will include Active members (enrolled after 2008), Inactive members (90 days from the plan termination date). If the member's plan has not become effective, you will not see them in your Book of Business.
- ✓ PPO plans that are non-commissionable will not show up in the book of business for upline agencies.

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Member Status Filter

Member Statuses reflect the most recent updates for a member. You can gain clear visibility to members who are impacted by C-SNP or SSBCI verification, a Service Area Reduction (SAR) or Medicare Supplement premiums. Unaffected members will have a blank status.

SAR statuses display until the member is enrolled into a future plan or is past their current plan's termination date.

SSBCI statuses display until 30 days after the plan's effective date.

C-SNP statuses will display until 2 months after the plan's effective date.

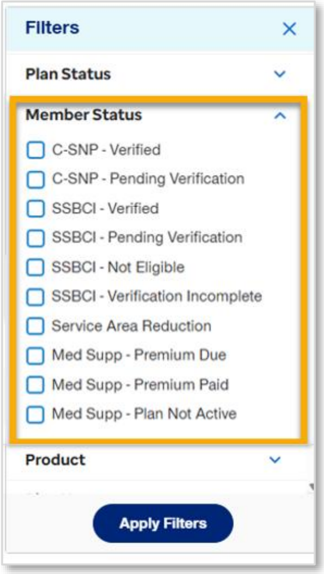
Med Supp statuses display until the payment has been made or if the member is no longer in the plan.

The **Member Status** filters can help you identify which members may need extra support so you can:

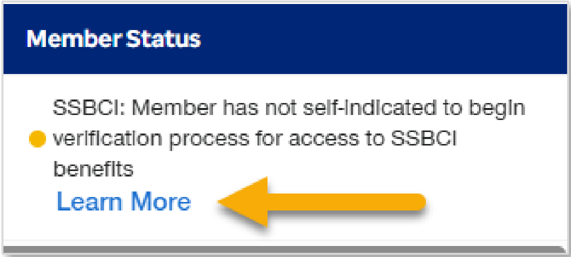
- Proactively prioritize outreach to members who may have questions or upcoming changes
- Set expectations by explaining what a status means and what the member may need to do
- Reduce confusion and repeat calls by addressing potential concerns before they escalate

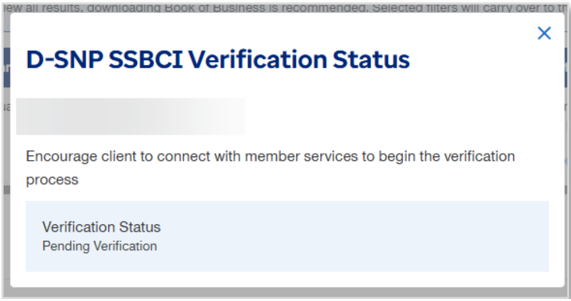
How does it work?

Under **Filters**, expand the **Member Status** dropdown. Select the filter you would like to apply, then click **Apply Filters**. It is that easy!



When a status is displayed, select **Learn More** to view additional details that explain what the status means and whether any action is needed.





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Frequently Asked Questions (FAQ)

Can I delegate access to my Book of Business?

Yes, access can be given to a non-agent who has been delegated access to an agent's Jarvis account. For steps on how to complete this process, view the *Jarvis Delegated Access Job Aid* in Learning Lab.

I am a solicitor, why can't I view my Book of Business?

Members enrolled by a solicitor will not display. Instead, request the list from your upline.

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 may not be 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 become effective, the member enrolled prior to 2008, the member moved to UnitedHealthcare as part of an acquisition, or the application was sold when you were a Direct-to-Consumer agent or solicitor. The report may include members that are not on your monthly statement because the report includes inactive members for 90 days, the application was non-commissionable or the member is new and doesn't qualify for renewals.

Can I see commission information in the Book of Business?

Yes, on the member profile page within the Book of Business. Or use the commissions search found in the main menu on Jarvis, click *Commissions* then *Commission Search*.

May I contact a person who was, but is no longer, in my Book of Business?

You must follow federal and state regulations and UnitedHealthcare policies and procedures related to Permission to Contact (PTC). Refer to the Agent Guide on Jarvis > Knowledge Center > Reference Guides.

As it relates to a Member Statuses, can a member view or change the verifying provider?

The provider verifying the chronic condition does not display in Book of Business. Members can call Member Services to inquire or change. Note: the verifying provider may be different than the PCP.

If a member's HPBP number will change next year, how do I find the new one?

A member's profile in the Book of Business will display their current plan year HPBP number. To see their number for next year, download your Book of Business file with HPBP selected and search for the member. When next year's information is available, the member's HPBP number will display in their profile page in the Book of Business.

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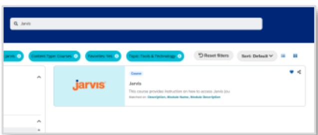
UnitedHealthcare has your back with resources to help support you and your members!

Agent Support:

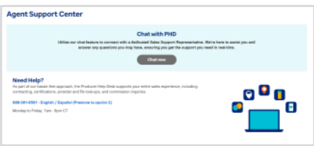
Explore the **Book of Business** section of Jarvis, where you can view your member information and pull custom reports.

CLICK HERE or go to *Jarvis > Book of Business*



Take advantage of the Jarvis course in **Learning Lab** to view videos and job aids specific to the Book of Business.

CLICK HERE or go to *Jarvis > Quick Access > Agent Training (Learning Lab)*



Reach out to the **Producer Help Desk** if you need additional support with you member questions and escalations.

CLICK HERE or go to *Jarvis > Agent Support Center*

Member Support:

Members can visit **MyUHC.com** or the UnitedHealthcare app to view their verification status and learn more about their plan details and coverage.

Members can visit **YouTube** and subscribe to the UnitedHealthcare channel to view 2026 changes and specifics to benefits.