2027 Agent User Guide

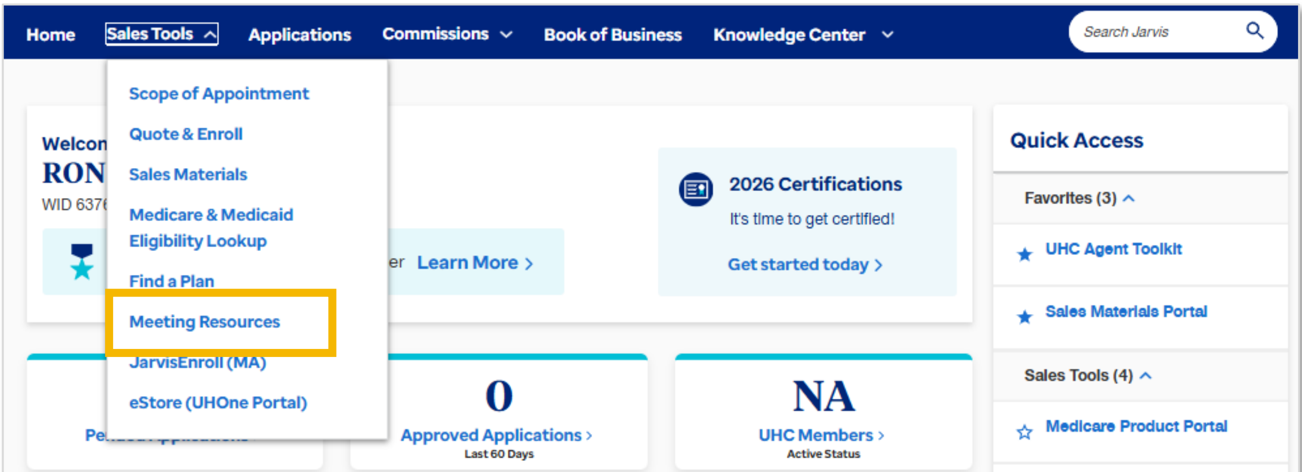
ERA Event Entry Tool

Overview

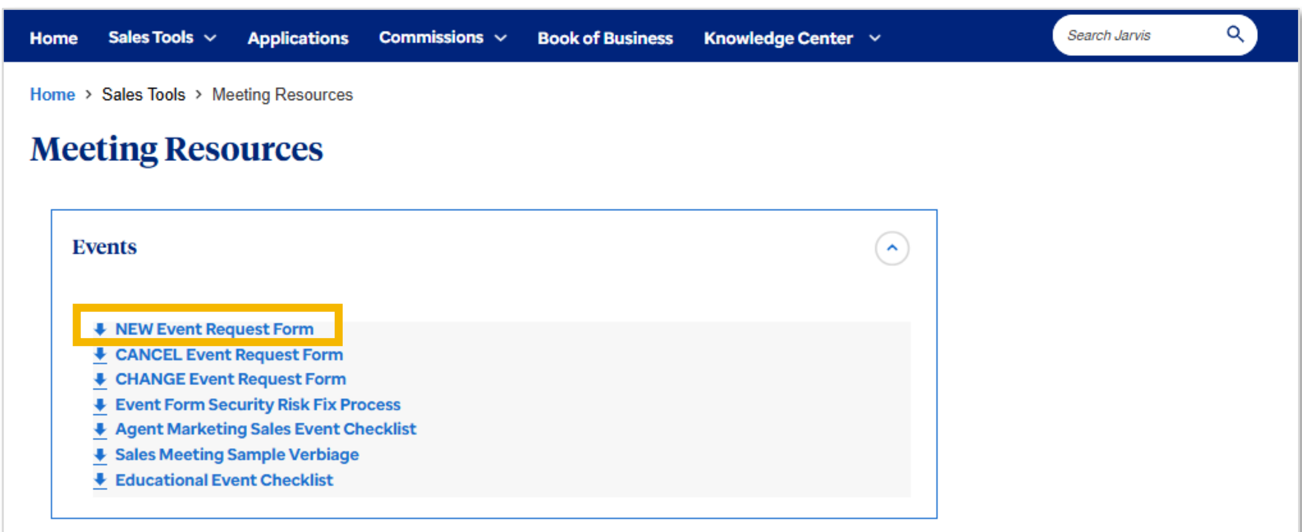
The ERA Event Entry Tool is a web-based application that allows agents to submit upcoming event information directly to UnitedHealthcare. It replaces the previous ERA spreadsheet process with a fully automated system that provides real-time error validation. Prior to conducting any sales/marketing events, agents must complete the Events Basics course in Certifications.

Accessing the Event Entry Tool

To access the ERA event entry tool, simply log into Jarvis and look for Sales Tools in the navigation bar. Click Sales Tools, and you will see Meeting Resources in the menu.



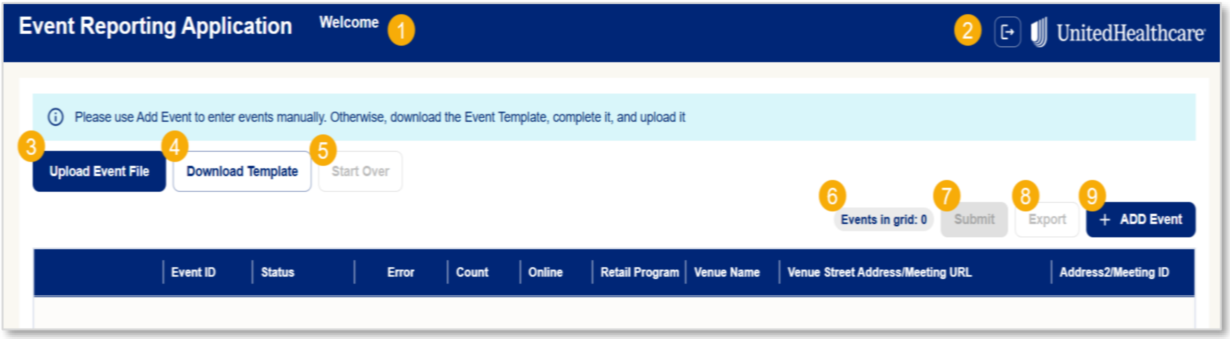
Click Meeting Resources. On the Meeting Resources page, click on Events.



The ERA event entry tool will open in a new tab in your browser.

Event Reporting Application navigation

When you log in to the ERA, you will see the landing page. Here is what appears on the screen:



1. **Displays your name:** Welcome [Agent Name]
2. **Logout button:** leave the ERA
3. **Upload Event File Button:** upload your events into the ERA
4. **Download Template**: download a template to manually enter events
5. **Start Over:** clear your submission and start over
6. **Event Counter:** counts how many events are listed in your submission
7. **Submit button:** submits your events and displays any errors, if applicable
8. **Export button**: export your events entered directly in the grid as a spreadsheet
9. **Add button:** add another row to enter another event

Grid fields

Each row in the grid represents one event and mirrors the same columns in the ERA spreadsheet. The following fields are available:

10. **Event ID:** the ID number for your event
11. **Status:** whether the event has been submitted, is invalid, or has not been submitted
12. **Error:** any issues that are in your event submission
13. **Count**: the number of events listed in your submission
14. **Online:** a drop-down menu stating whether the event is online or not
15. **Retail Program:** the name of the retail program
16. **Venue Name:** the name of the location where the event is taking place
17. **Venue Street Address/URL:** the address where the event is taking place (local or online)

ERA navigation cont’d

Grid fields cont’d

18. **Address2/Meeting ID:** additional address information or the event URL
19. **City:** city where the event is held
20. **State:** state where the event is held
21. **Venue Zip**: ZIP code for the venue
22. **County:** county where the venue is located
23. **Event Date:** date the event is taking place
24. **Start Time:** time the event will begin
25. **End Time:** time the event will end

26. **Event Category:** category of the event (e.g. educational event, marketing/sales event)
27. **Language:** the language that will be spoken at the event
28. **Presenting Product:** which products will be presented at the event
29. **Owning Agent Name**: full name of the owning agent (the owning agent is responsible for the event’s logistics and filing. If the event is setup to collect RSVPs, the Owning Agent is responsible to manage the RSVPs and Opportunities in SYNC).

30. **Owning Agent Writing #:** writing ID for the owning agent
31. **Presenting Agent Name:** name of the agent who is presenting (can be the same as the owning agent)
32. **Presenting Agent Writing ID:** writing number for the agent who is presenting
33. **Seating Capacity**: number of people who can attend the event
34. **Venue Type**: the type of venue (e.g., library, restaurant, community center)
35. **Venue Phone**: phone number for the venue

ERA navigation cont'd

Row action icons

Each event row has icons on the far left for managing that row:

Field	Description
✓ **Checkmark**	Save the row
✕ **X**	Delete the row (before saving)
Pencil	Edit a previously saved row
Trash Can	Delete a saved row (will prompt for confirmation)

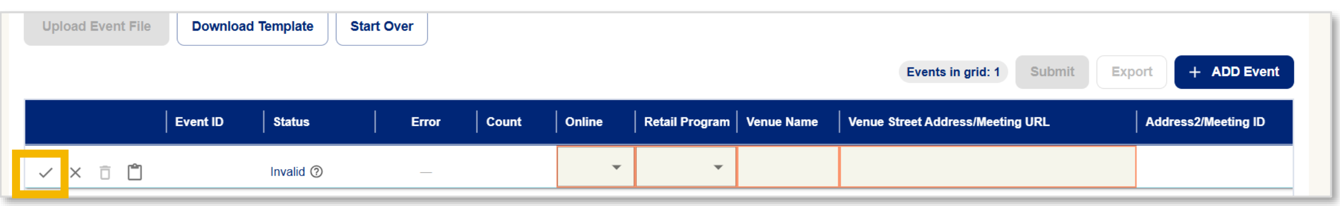
Submitting events

2 ways to submit events

Agents can submit events using either of the following methods:

1. Direct Grid Entry — Type event information directly into the grid on the web tool
2. Template Upload — Download the template, fill it out and upload the completed file

Method 1: Entering events directly in the grid



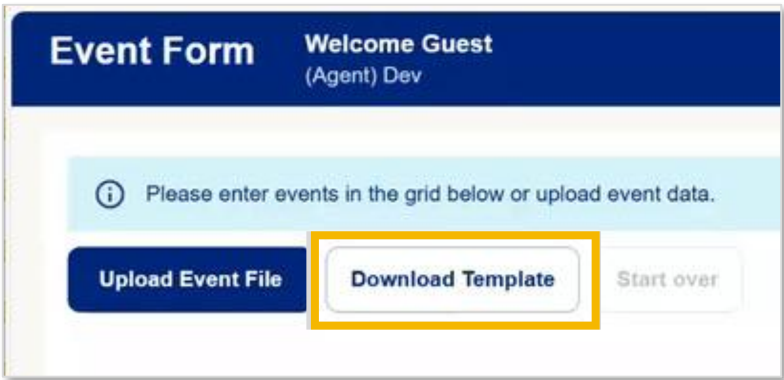
1. Fill in each field in the row.
2. Click the Checkmark icon on the left side of the row to save it.
3. Repeat steps 1–3 for each additional event.

4. Once all rows are saved, click Submit.
5. Review any errors that appear in the Error column (see Reviewing Errors section).

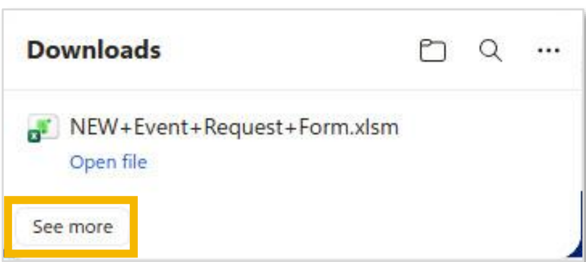
Note: *All rows must be saved before you can click Submit. Unsaved rows will not be included in the submission.*

Submitting events cont'd

Method 2: Uploading a template

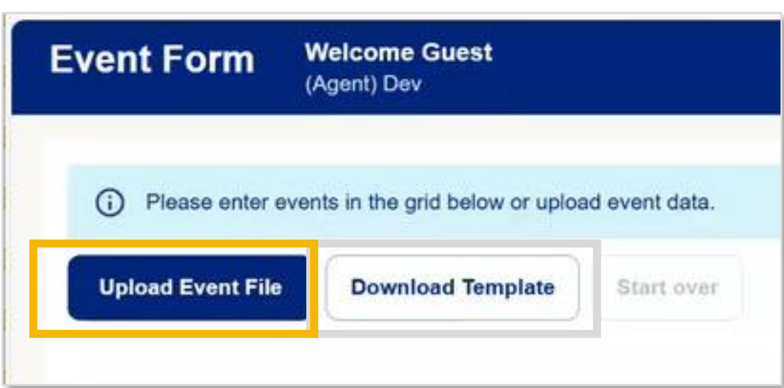


1. Click Download Template to save the template spreadsheet to your computer.



2. Open the file and fill in your event information.

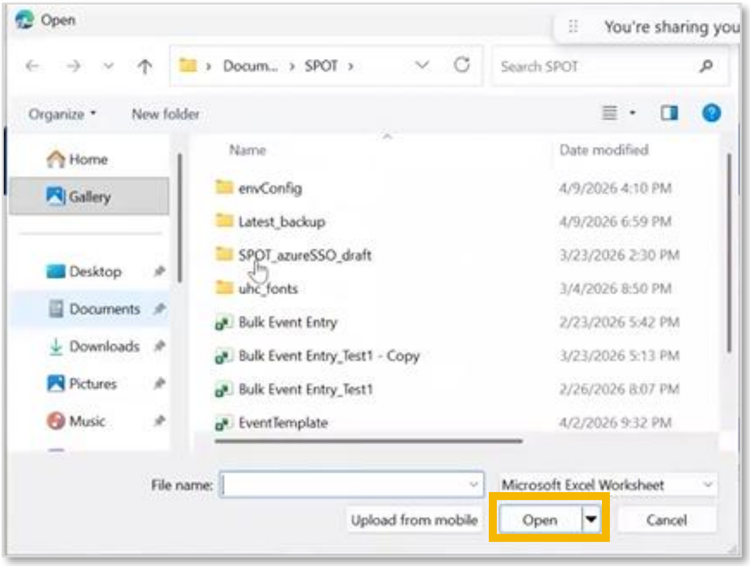
3. Save the completed file to your computer.



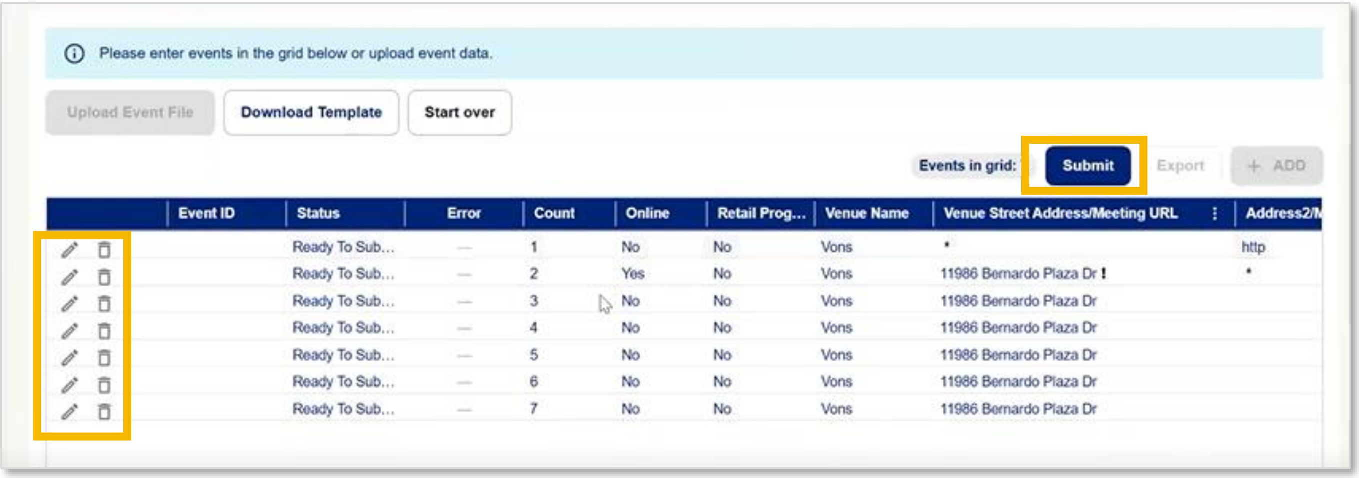
4. Return to the ERA Event Web Tool and click Upload.

Submitting events cont'd

Method 2: Uploading a template



5. A file browser window will open. Locate your saved file and click Open.



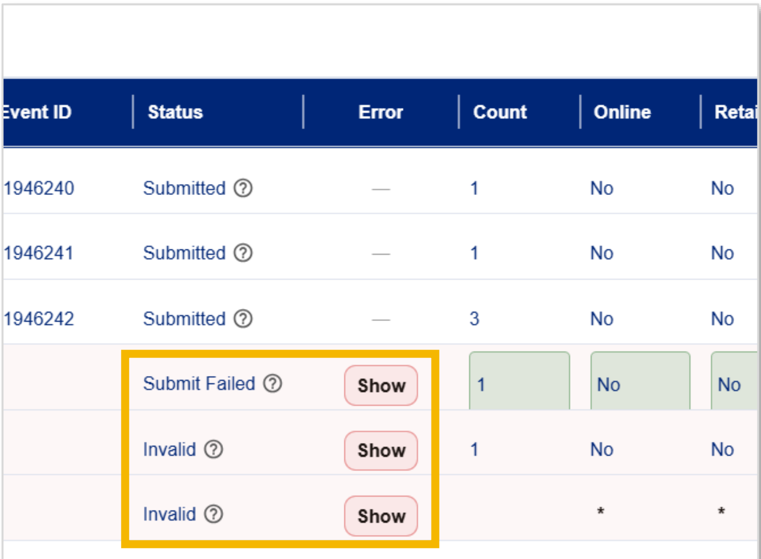
6. Your events will populate in the grid automatically.
7. Review the grid and make any edits needed using the Pencil icon.
8. When all rows are ready, click Submit.

Note: *After uploading a file, the Add and Export buttons will be grayed out. You can still edit or delete individual rows using the Pencil and Trash Can icons. To make bulk changes, use Start Over and re-upload a corrected file.*

Reviewing and fixing errors

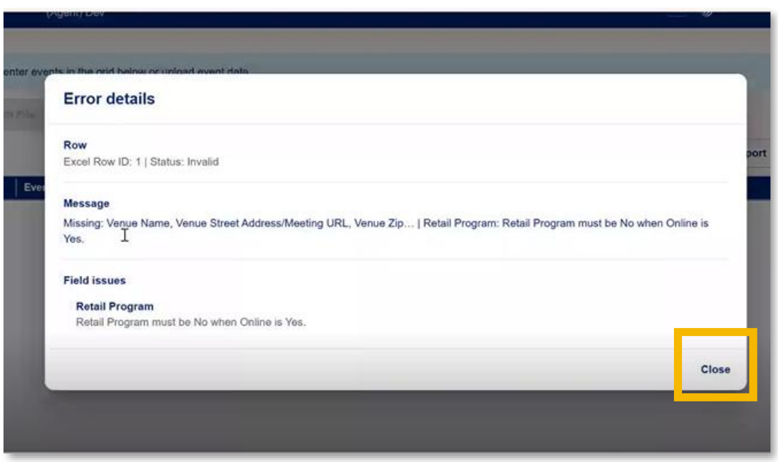
Post-submission follow-up

The system will validate your submission automatically. If any errors are found, they will appear in the Error column of the affected rows.



Viewing error details

1. Find a row with an error indicator in the Error column.
2. Click Show next to that row.
3. A pop-up window will appear with the error details.

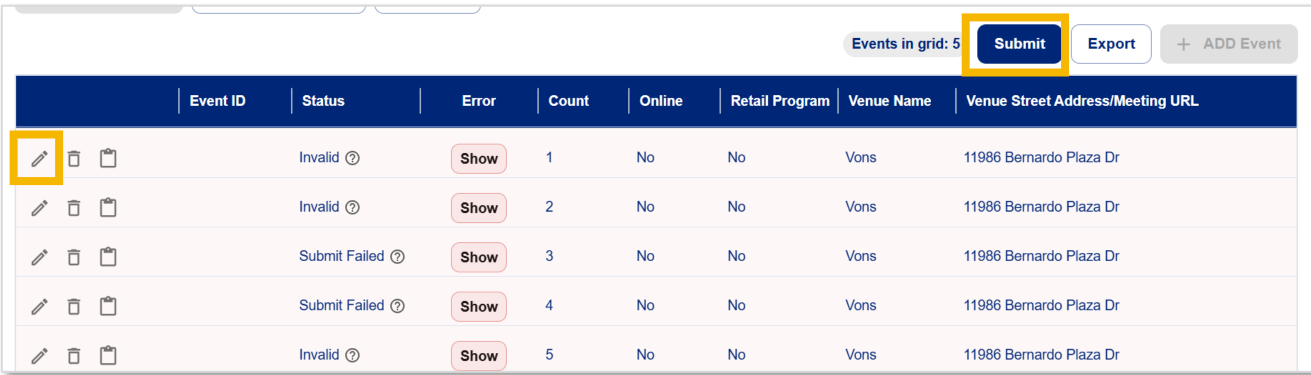


3. A pop-up window will appear with the error details, including:

•**Row** — which row has the issue
•**Field** — the specific column or field with the problem
•**Error** — what is missing or incorrect

4. Review the details and click Close to dismiss the pop-up.

Reviewing and fixing errors cont'd



5. Use the Pencil icon to edit the row and correct the error.

6. Save the row and click Submit again.

Note: *Rows that were submitted successfully are protected and will not be re-reviewed. Only rows with errors will go through validation again when you resubmit.*

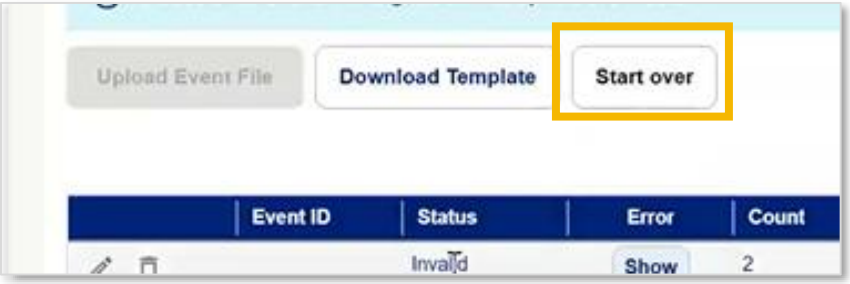
Exporting your events

Use the Export button to save a copy of your event data as a spreadsheet. Three export options are available:

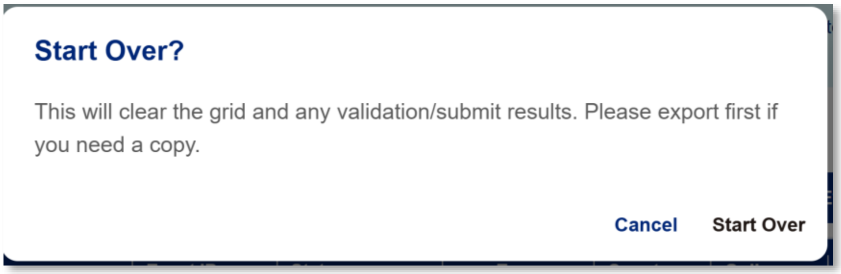
Field	Description
Successful	Exports only the events that passed validation with no errors
Errors	Exports only the events that have errors
All	Exports all events regardless of status

Starting over

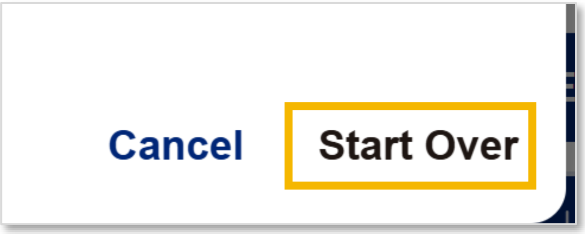
The Start Over button clears the grid and removes all submitted results. It becomes active only after at least one event has been saved.



1. Click Start Over.

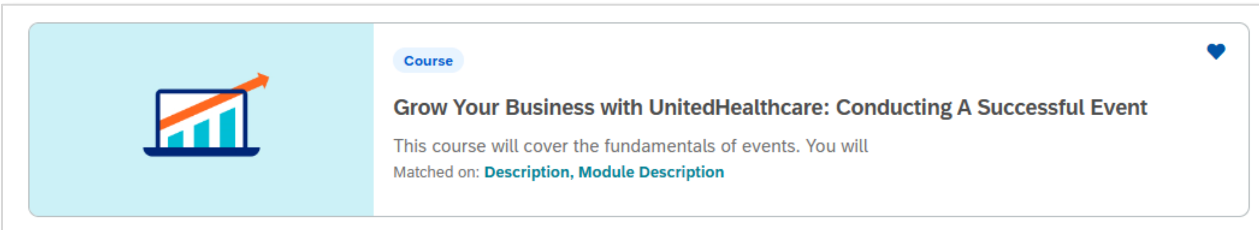


2. A confirmation pop-up will appear warning that this will clear the grid and any validation results. Export your event list first if you need a copy.



3. Click Cancel to go back or click Start Over in the pop-up to confirm. The grid will reset and you can begin entering or uploading events again.

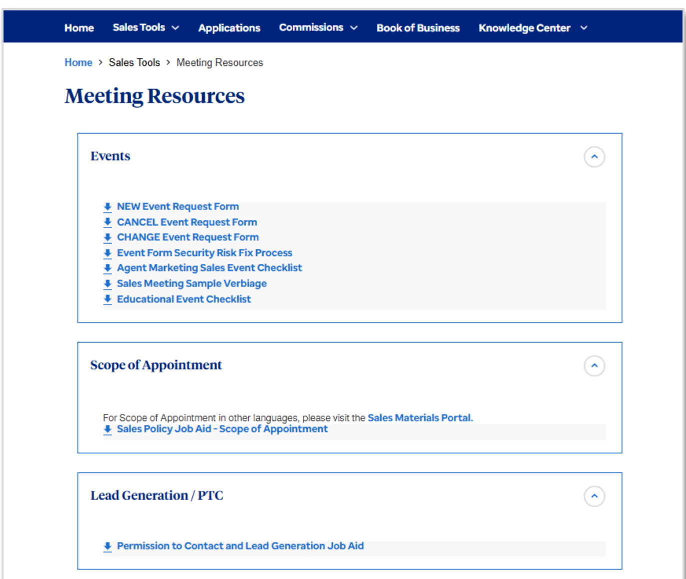
Additional resources to explore



Grow Your Business with UnitedHealthcare: Conducting a Successful Event

Learning Lab > Content Library > Grow Your Business with UnitedHealthcare: Conducting a Successful Event

Learn what it takes to conduct a successful event. Go to Learning Lab



Explore meeting resources on Jarvis

Jarvis > Sales Tools > Meeting Resources

Get checklists, event cancel forms, permission to contact form (PTC) and more. Go to Meeting Resources

Additional resources to explore cont’d

Understanding events national webinar

Learning Lab > Content Library > Grow Your Business with UnitedHealthcare: Conducting a Successful Event

Learn the differences between types of events at this national webinar. **Register for the webinar**