New Agent Readiness Guide

Essential resources to build a thriving business and ramp your productivity from day one

Continue

UnitedHealthcare®

Welcome to UnitedHealthcare Individual & Family Plans

The guide is your starting point for connecting with the tools, resources and support to succeed as a new agent.

UnitedHealthcare is here to support you every step of the way. As a trusted leader in health insurance, we provide the tools, resources, and support you need to grow your business and serve your clients with confidence. From streamlined business management solutions to sales support and commission opportunities, this guide is designed to help you succeed in today's dynamic healthcare market.

Jarvis, all your tools in one place

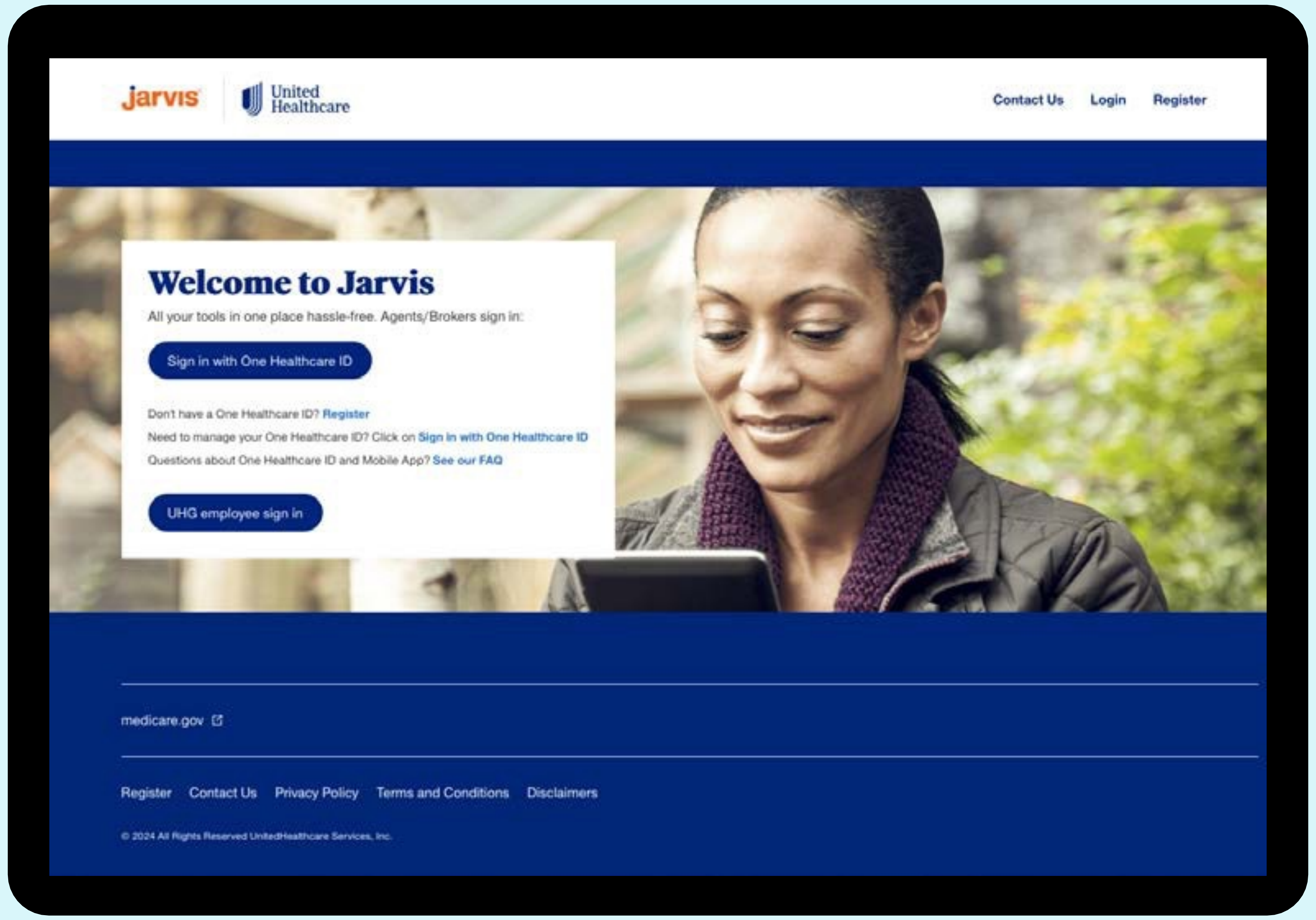
Visit Jarvis, your all-in-one hub for managing your business.
From learning and training to selling and support, Jarvis provides everything you need in one place. Use it to oversee your Book of Business, access educational resources, and tap into essential tools like Sales and Marketing Materials, your Agent Guide and more.

Most popular tools on Jarvis

Selling
- Quote & Enroll
- Off-Exchange
- Sales & Marketing Materials

Managing business
- Book of Business
- Application Status
- Member Profile Page
- Dashboard Reports

Learning
- On-Demand Training Modules
- Guides and FAQs
- Agent News



Log in to Jarvis

Agent training

Step 1: Take agent on-demand training

The Individual & Family Plan (IFP) Training site is your one-stop shop to further your knowledge as a newly appointed agent. This site features a variety of on-demand, interactive modules about UnitedHealthcare's IFP business and allows you to learn at your own pace.

Some courses include:

- IFP Background
- UnitedHealthcare's Value Story
- Agent Resources
- IFP Products and Network
- IFP Dental and Vision
- Compliance

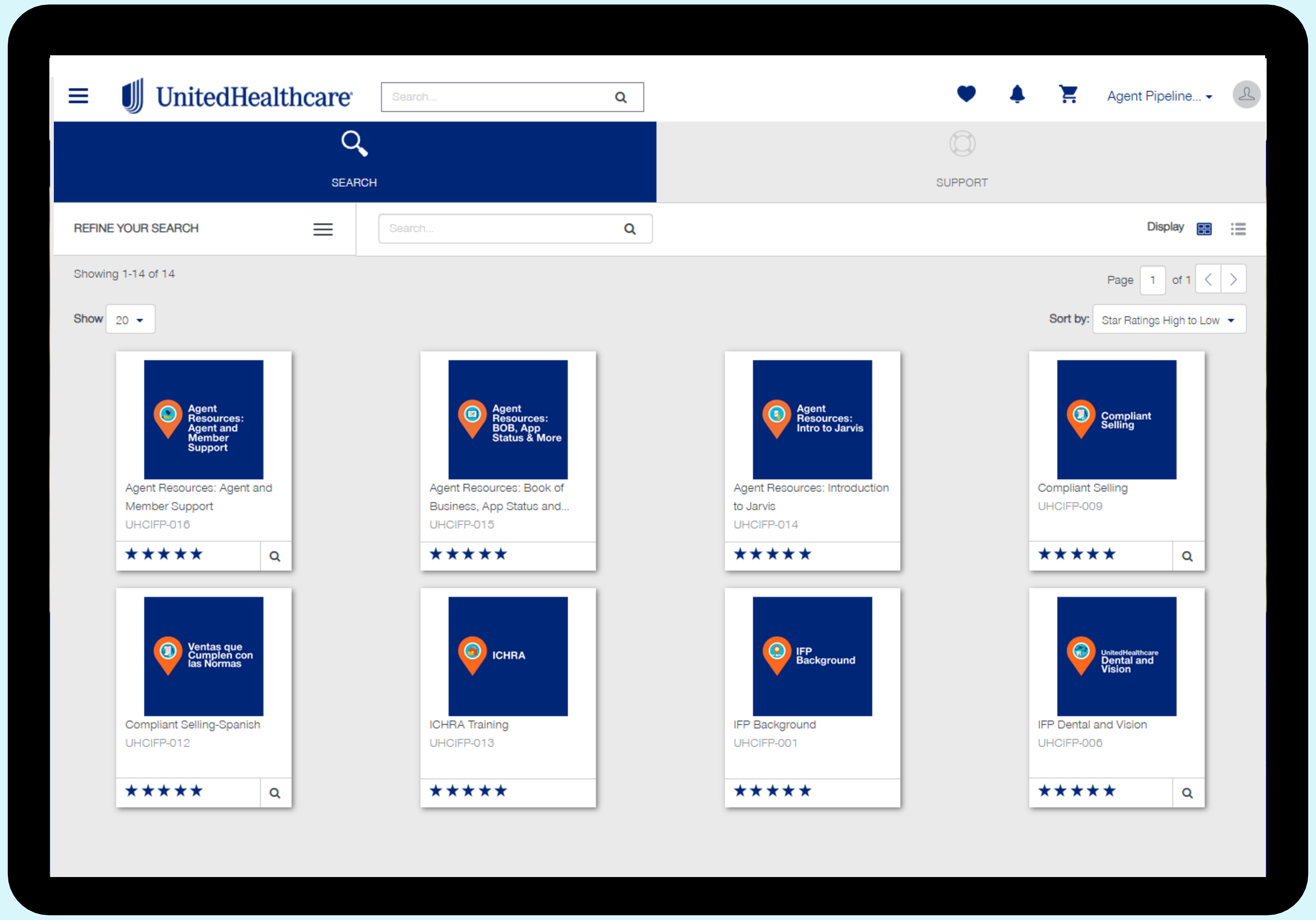
Click *Knowledge Center > Agent Training >* ***Launch UHC IFP Training***

IFP Regional training

Regional virtual training sessions are held throughout the year on rotating topics to help further your knowledge and grow your business. The calendar of regional trainings can be found on **Jarvis** > *Knowledge Center > Agent Training >* ***Regional Training.***

How to access training

jarvis



Access IFP Training

Compliance

Compliance is a critical foundation for selling Individual & Family plans.

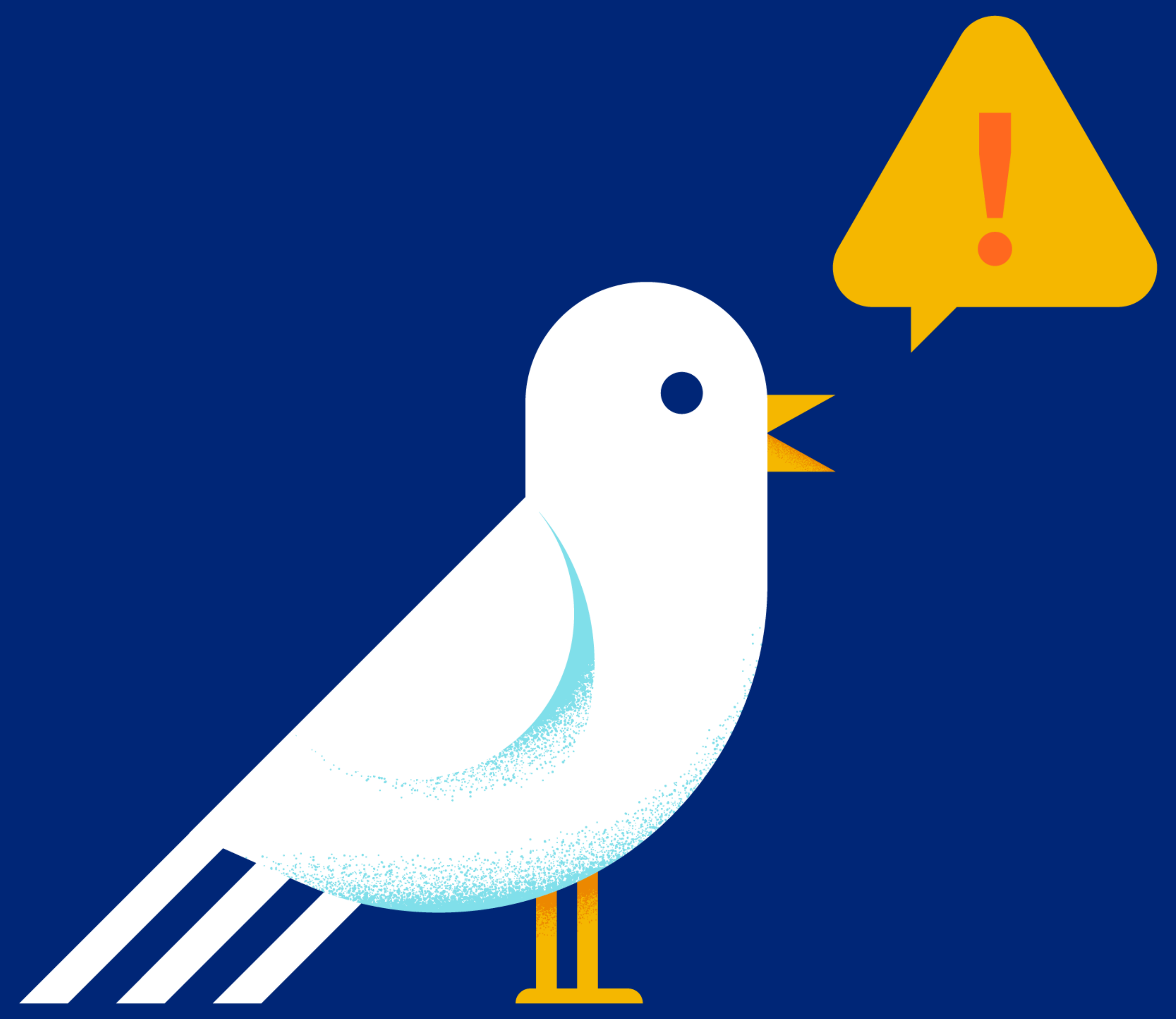
The Compliance page on Jarvis provides key compliance resources agents must review to understand their responsibilities and follow CMS and UnitedHealthcare requirements, including data security, consumer consent, sales policies, and incident reporting.

Go to **Jarvis,** then click *Knowledge Center* > ***IFP Compliance***

In addition, agents should review the IFP Agent Guide for UnitedHealthcare policies and procedures when selling Individual & Family plans.

Go to **Jarvis,** then click *Knowledge Center* > ***Reference Guides***

These resources help ensure you are prepared, compliant, and confident as you begin selling.



Access Compliance Page

Access IFP Agent Guide

Jarvis tools for the sales process

Step 2: Learn about the IFP network and plans in your area

Everything you need is at your fingertips. **Network and Benefit Grids** are your resources for information on plans, premiums, benefits, network and more.

Go to **Jarvis,** then click *Knowledge Center* > ***Selling Resources***

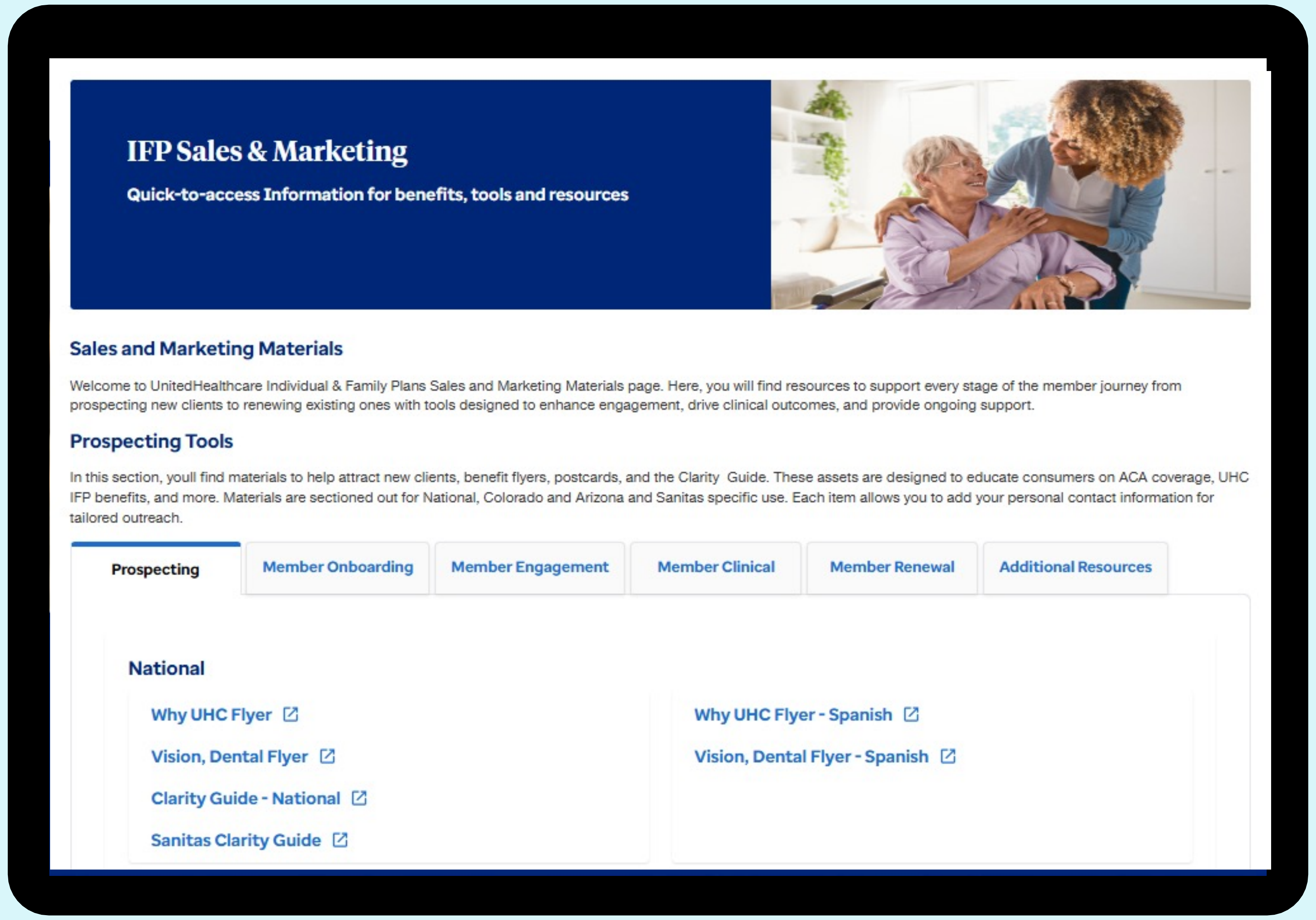
Access Grids

Jarvis tools for the sales process

Step 3: Find resources to support every stage of the member journey from prospecting new clients to renewing existing ones with tools designed to enhance engagement, drive clinical outcomes, and provide ongoing support.

Materials are also available in Spanish!

Go to **Jarvis,** then click *Sales Tools* > ***Sales & Marketing Materials***



Access Sale & Marketing Materials

Prepare for your first meeting

All that preparation through available materials and trainings, leads up to the sale! Additional tips for a successful enrollment:

- Get acquainted and build rapport with your client
- Be thorough in your needs assessment, including reviewing and confirming plan type, network providers and drug coverage, if applicable
- Set cost expectations and review key details about premiums, copays and drug costs
- Explain the full value of the plan, including any additional benefits or wellness extras

Tip

Maintain year-round connections with your clients while boosting your referral potential! Show appreciation for their business, invite them to reach out with any questions, and encourage them to share your name with others who may need help with their insurance needs.

Enrollment

Enroll a client

UnitedHealthcare utilizes the electronic enrollment platform HealthSherpa that specializes in Marketplace enrollment and is fully integrated with **HealthCare.gov.**

1. **Federally-facilitated Marketplace**
   To enroll a client who resides in a FFM state.

   Visit HealthSherpa

   Visit Quote & Enroll

2. **State-based Marketplace**
   To enroll a client who resides in a state that has its own Marketplace, please visit the applicable State-based Marketplace website for enrollment.

3. **Off-Exchange**
   For Off-Exchange enrollment, visit **Jarvis** > *Tools* > ***Off-Exchange*** **and ICHRA.**

   Visit Off-Exchange

HealthSherpa for Agents

Easy quoting, enrollment, effectuation

Powerful shopping tools

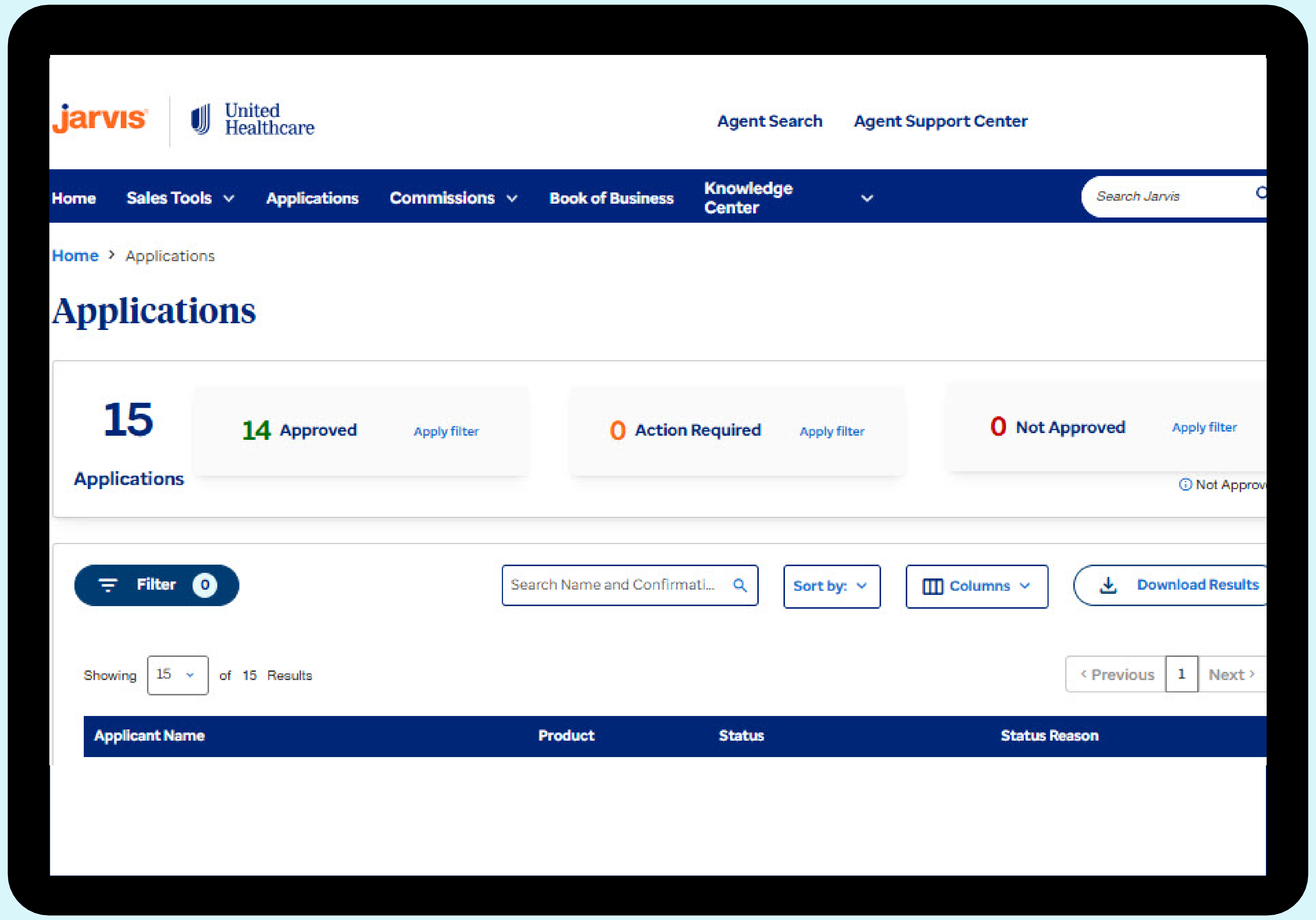
- Fast, accurate quoting with subsidy estimation
- Compare plans from all the carriers in your area
- Provider and prescription

Application Status

After enrolling your client and submitting their application, you can easily monitor its progress using the application status feature.

View your client's application status and recent activity at any time, helping you stay on top of your business, track progress, and take timely action to ensure enrollment is successfully effectuated.

Go to **Jarvis,** then click *Applications*



Access App Status

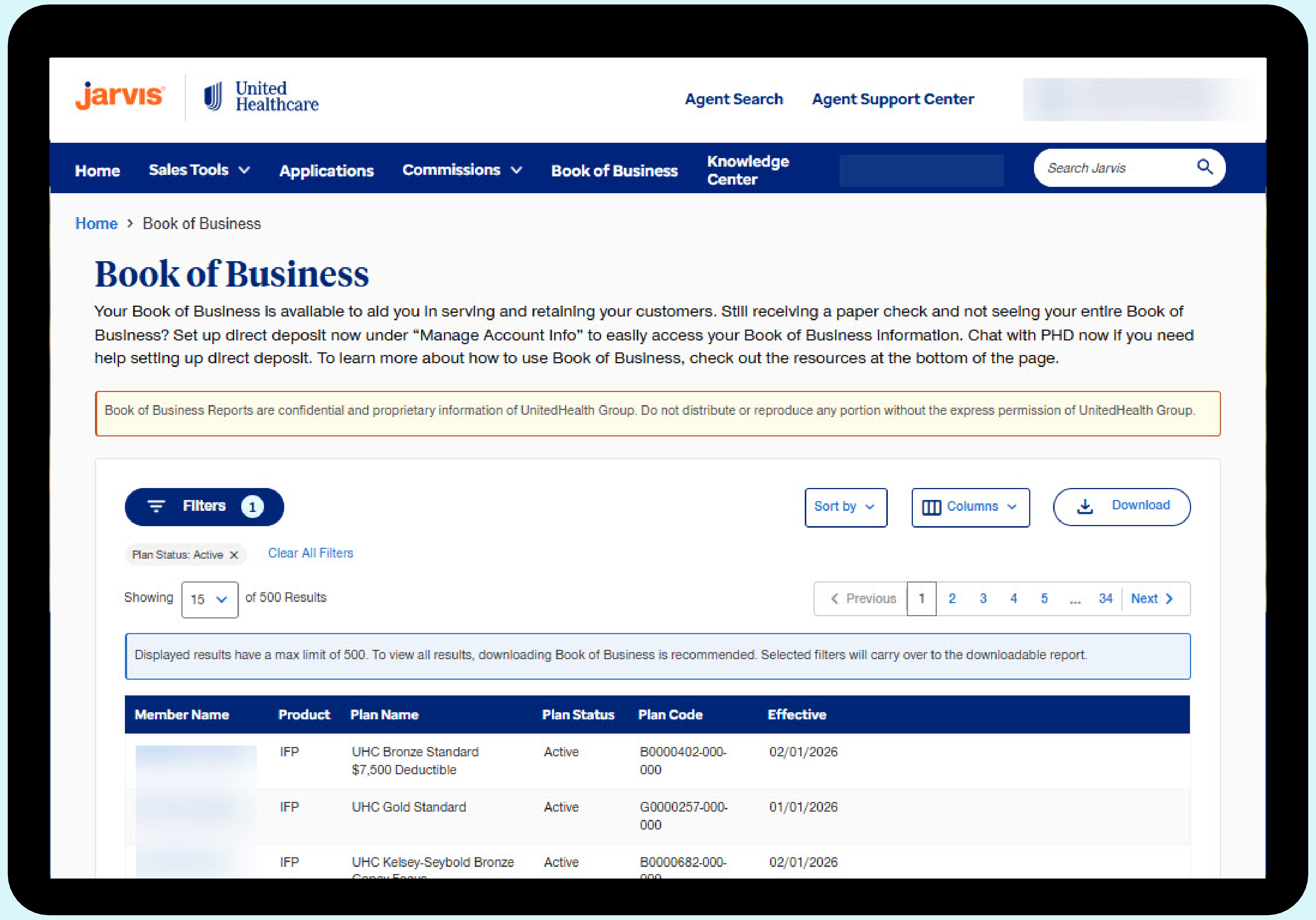
Resources to manage your business

Book of Business

Your Book of Business (BoB) provides easy access to member information to help drive retention. Accessible through Jarvis, BoB allows you to view up to 2,000 member records on screen, search for individual members, and export a comprehensive spreadsheet report of all members.

Through the BoB, you also will be able to support your clients using the Member Profile page. You can order a member ID Card, view application and commission details, or change the primary care provider on behalf of the client and more.

Go to **Jarvis,** then click Book of Business



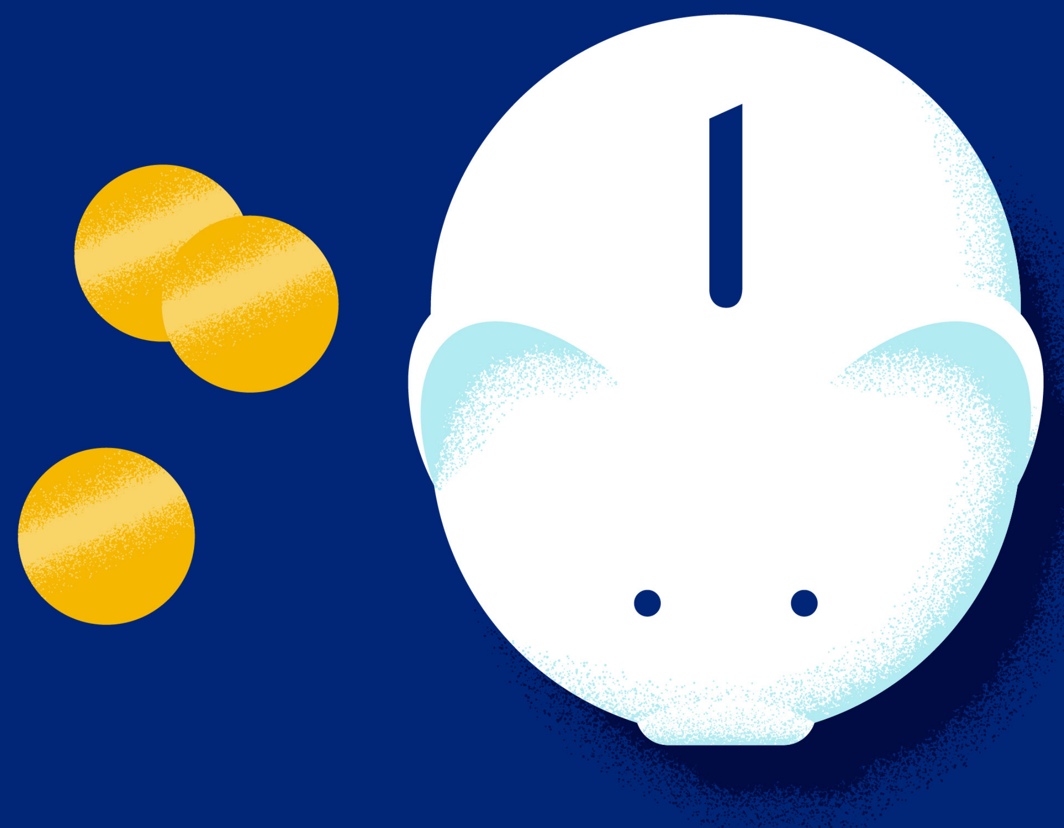
Access BoB

Commissions

Whether you're pursuing a full-time career, a part-time opportunity or simply looking to supplement your income, UnitedHealthcare is here to support your goals. As a sales agent, you'll earn commissions not only for eligible new plan enrollments, but also when existing IFP members re-enroll with UnitedHealthcare.

Jarvis provides tools to help you manage and track your commissions. Visit the Commissions Search page, download your statement and view commission summaries for you and your downline agents (if applicable) based on member effective date or application signature.

Tip: Enabling direct deposit will speed up your commission payments. You can do so by logging in to Jarvis, clicking your username, selecting "Manage Profile" and entering your direct deposit information.



How to access commission statements

1. Log in to Jarvis
2. Click **Statements >** ***Statements and More***

The Producer Help Desk is ready to help

Questions on commissions? Need product information?
When you can't find the answer or need additional support, look to the Producer Help Desk (PHD). The PHD is a team of sales support professionals who are up to date on the latest ACA-related information and happenings around UnitedHealthcare, including:

- **Contracting** – status updates, up-line identification, state appointments and licensing
- **Commissions** – inquiries related to statements, status of payment, agent of record, true-ups and renewals
- **Pre-enrollment** – application status checks and updates to pending applications
- **Benefit information** – information related to coverage
- **Provider and prescription look-ups** – inquiries related to finding members a provider and covered prescription medications

Two easy ways to connect:

English: **1-866-235-4095**
Espanol: Presione la opcion **2**

Live chat via Jarvis

PHD Chat

New IFP agent checklist

To help you get off to a strong start, we recommend completing these steps:

- ☐ **Log in to Jarvis** and familiarize yourself with key features and tools, including:
  - Jarvis homepage quick links (including provider look-up and pharmacy locator)
  - Book of Business
  - Application Status
  - Agent News
  - Knowledge Center
- ☐ **Enable direct deposit** by clicking your username in the upper right-hand corner of Jarvis and selecting “Manage Profile”
- ☐ **Visit the IFP Training site** to start taking on-demand trainings
- ☐ **Register for regional training webinars,** such as “New Agent Orientation,” or trainings tailored to your market
- ☐ **Review the IFP Agent Guide,** which provides helpful insight regarding UnitedHealthcare IFP business operations. It’s also a comprehensive document that outlines policies and procedures to ensure compliant and ethical conduct, professionalism, and knowledge of required business processes and responsibilities
- ☐ **Visit the Sale & Marketing Materials** page to download personalized marketing flyers and more
- ☐ **View the Agent Support Center** page to learn how to contact the PHD

Let's grow your business together

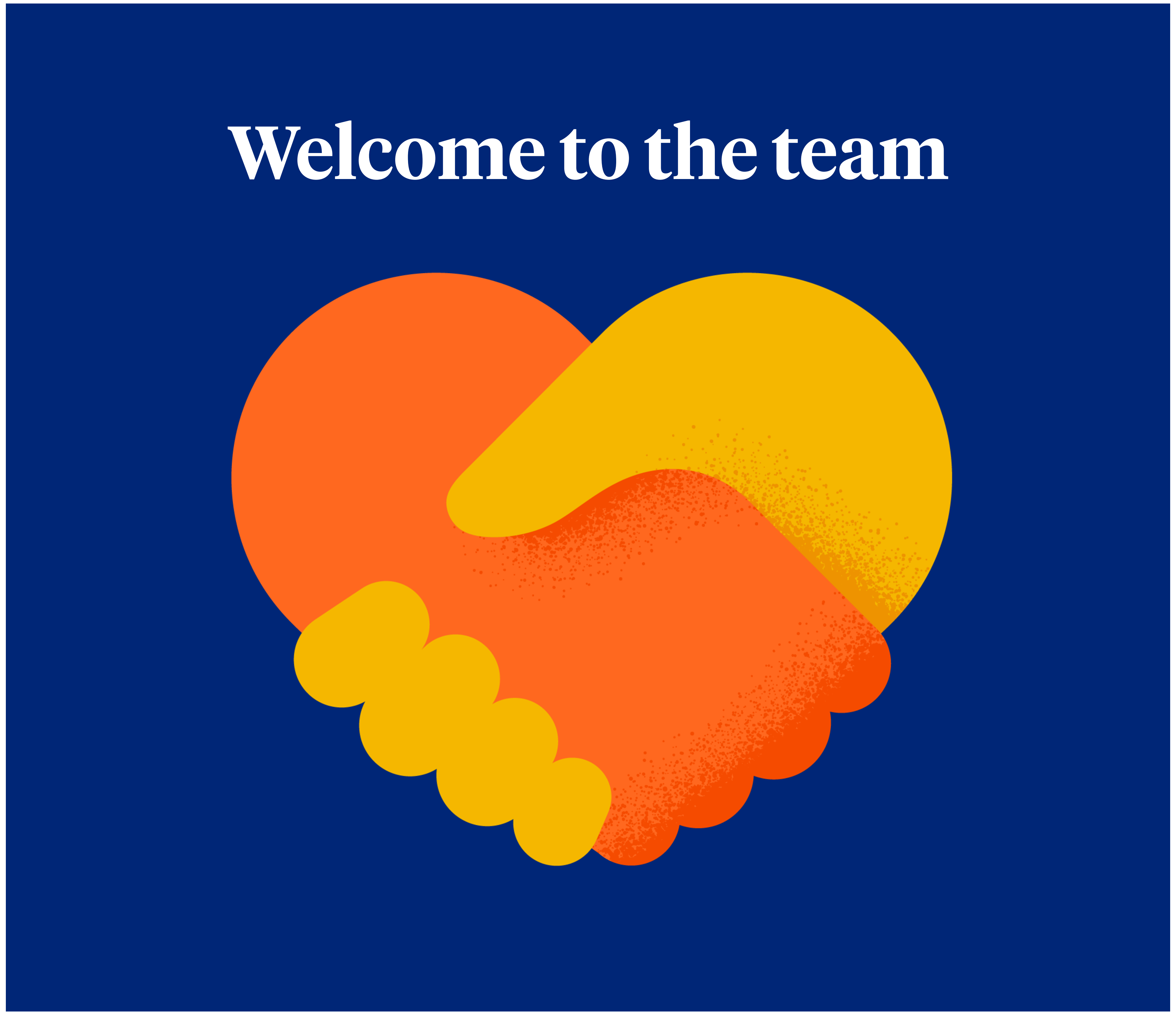
As you begin your career as a UnitedHealthcare IFP agent, keep this guide as reference as a reminder of all the tools and support you have at your disposal.

Jarvis Agent Portal

- Sales Tools
- Marketing Materials
- Agent Training
- Quote & Enroll
- Book of Business

Agent Support

- Producer Help Desk
- Your local UnitedHealthcare Agency Manager



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