



2025 Certifications Decision Tree



I want to sell or conduct...

I must pass these assessments

Base Level

Medicare Advantage Plans non-SNP (MA non-SNP)

UnitedHealthcare, AARP, Erickson, Peoples Health, Preferred Care Partners, Preferred Care Networks, or Rocky Mountain Healthcare branded plans

AARP Prescription Drug Plans (PDP)

AARP Medicare Supplement Insurance Plans

Standalone Dental, Hearing and Vision Plans

Successfully pass all 3 Base Level assessments:

- ▶ Medicare Basics (or transfer AHIP or NABIP passing score)
- ▶ Ethics & Compliance
- ▶ AARP

Next Level

Dual Eligible Special Needs Plans and/or Chronic Condition (D-SNP/C-SNP)

UnitedHealthcare, Preferred Care Networks, Preferred Care Partners, and Erickson

Successfully pass all Base Level assessments AND Dual Eligible and Chronic Condition Special Needs Plans (D-SNP/C-SNP) assessment

Events Basics

To conduct marketing/sales events, host a retail kiosk, or conduct a community meeting

Successfully pass all Base Level assessments **AND** the Events Basics module

Institutional and Institutional-Equivalent Special Needs Plans (I-SNP/IE-SNP)

Successfully pass all Base Level assessments **AND** Institutional and Institutional-Equivalent Special Needs Plans (I-SNP/IE-SNP) assessment (available by invitation only)

Senior Care Options UnitedHealthcare

Successfully pass all Base Level assessments **AND** Senior Care Options assessment (available by invitation only)

All agents must first agree to the Pledge of Compliance before taking any assessments.

United
Healthcare®