2026 Certification User Guide

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2026 Annual Certification Requirements

UnitedHealthcare Certification Requirements

To solicit, present or sell any products in the UnitedHealthcare® Medicare products (m*ay include plans branded UnitedHealthcare, AARP, Erickson, Peoples Health, Preferred Care Networks, Preferred Care Partners, or Rocky Mountain Healthcare)*, you must be **licensed** and **appointed** (as required by the state) in the state in which the consumer resides and **certified** in the product(s) you are presenting to and/or enrolling the consumer. To become certified for the plan year, you must successfully pass all the Base Level assessments and the Next Level assessments for the product(s) you wish to sell or events you wish to conduct.

NOTE: While you may proceed directly to each assessment without reviewing the certification content, it is strongly recommended that you review the Certification Study Guide before attempting the assessment.

What's New & Pledge of Compliance + **Base Level Assessments** + **Next Level Assessments (if applicable)** = **CERTIFIED 2026**
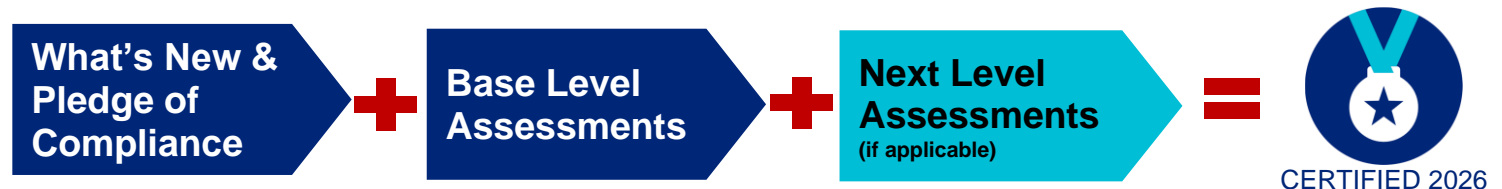
A 4-step summary of how to certify is as follows:

Step 1: Review any *recommended* courses needed:
- The **STUDY GUIDE** which contains the content needed to pass the assessments
- The **DECISION TREE** to help you determine which courses to take
- The **USER GUIDE** (you are reviewing now) with detailed step-by-step certification instructions
- The **PATH COMPARISON VIDEO** for a visual demonstration of everything you need to complete

Step 2: Complete the *required* courses
- Review the **WHAT'S NEW** document which summarizes key topics that are new for the year
- Review and sign the **PLEDGE OF COMPLIANCE**

Step 3: Complete all 3 REQUIRED Base Level Assessments
- A passing score of **85% or higher within 6 attempts (70% for AARP)** is required
- Failing any Base Level assessment will block access to any other assessments, and you will not be able to market or sell any UnitedHealthcare Medicare plans for the plan year.
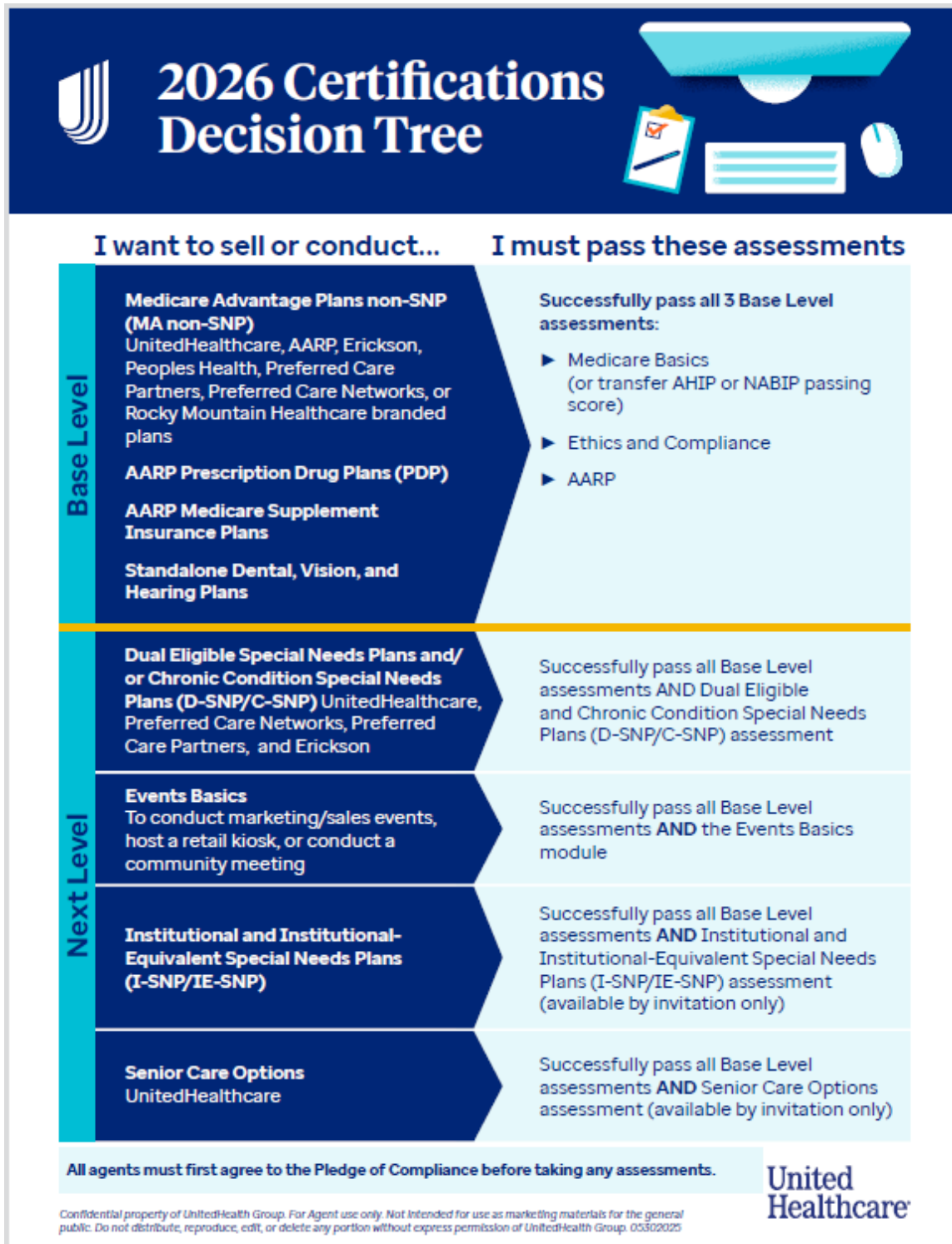- Base Level assessments must be taken in order: 1) Medicare Basics*, 2) Ethics and Compliance, 3) AARP

  * Medicare Basics includes credit for Medicare Advantage Plans (non-SNP), Prescription Drug Plans, Medicare Supplement Insurance Plans and Standalone Dental, Vision and Hearing.

Step 4: Complete any Next Level Modules and/or Assessments
- Events Basics module completion is required to conduct any marketing/sales events
- Dual Eligible and Chronic Condition Special Needs Plans (D-SNP/C-SNP) require a passing score of **85% or higher within 6 attempts**
- You may also be invited to sell other plans. These will appear on your Home Page in Learning Lab if you have been invited.
  - Institutional and Institutional-Equivalent Special Needs Plans (I-SNP/IE-SNP)
  - Massachusetts Senior Care Options
  - Massachusetts One Care

Here is a Decision Tree to help you understand your options:

2026 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, Vision, and Hearing Plans**	Successfully pass all 3 Base Level assessments: ▶ Medicare Basics (or transfer AHIP or NABIP passing score) ▶ Ethics and Compliance ▶ AARP
Next Level	
Dual Eligible Special Needs Plans and/or Chronic Condition Special Needs Plans (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®

AHIP or NABIP Certification for our EDC Partners
America's Health Insurance Plan (AHIP) or National Association of Benefits and Insurance Professionals (NABIP) Certification satisfies the requirement for the following UnitedHealthcare Certification assessment: Medicare Basics Assessment (including Medicare Advantage [non-SNP], Prescription Drug and Medicare Supplement Plans). *See instructions provided in this guide.*
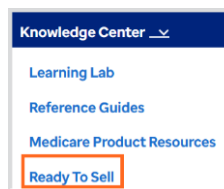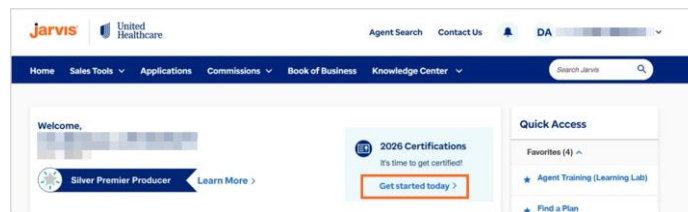
Certification Instructions

1 From Jarvis, click on the Certification **Get Started tile** to begin. If you don't see the tile, go to **Knowledge Center** and then click on **Ready to Sell.**

If you don't see the tile, go to **Knowledge Center** and then click on **Ready to Sell.**

From the **Certification Overview tab**, review the Certification Path **comparison chart** to determine your path.

Once you determine your path, click on the **Launch Learning Lab** button to take you to the Certification page.

*Note for Field Sales agents: Before you begin your certifications, decide if you are taking your certifications entirely via UnitedHealthcare modules **OR** if you will be using a combination of AHIP or NABIP and UnitedHealthcare courses. See below for AHIP and NABIP instructions.*

You will land on the Certification page in Learning Lab.

You will see your certification status at the top of the page. If you haven't started yet, click on the path that you want to take. **Remember, you only need to complete one path.** You may select the Spanish tab if that is your preferred language.
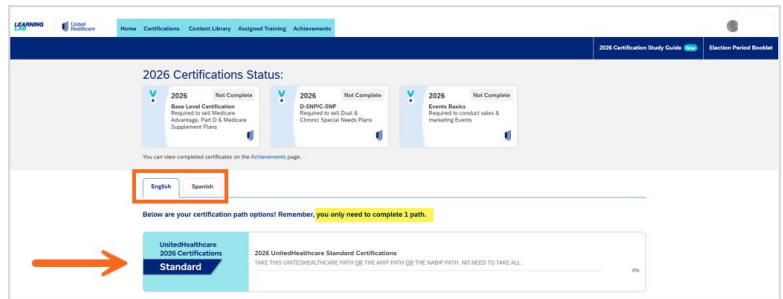

2 When the path opens in Learning Lab, you will see a description and some instructions.

If you select a path but decide that you would prefer to a different path click the back button and select a different path.
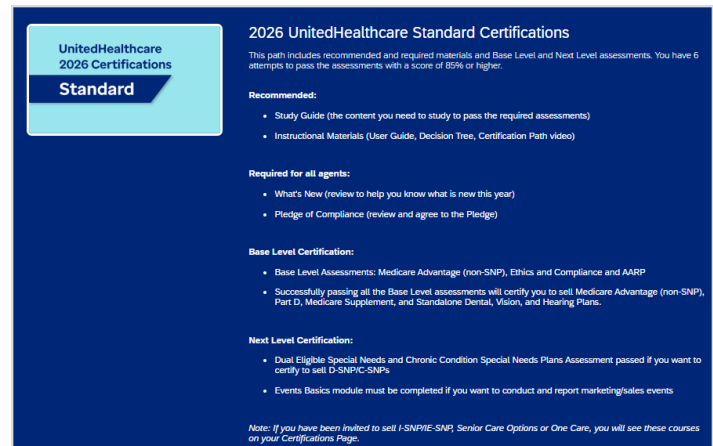
Below the description, you will first see the **Study Guide** which has the content you need to know to pass the assessments. Then you'll see some **RECOMMENDED courses**. These are optional but highly recommended.
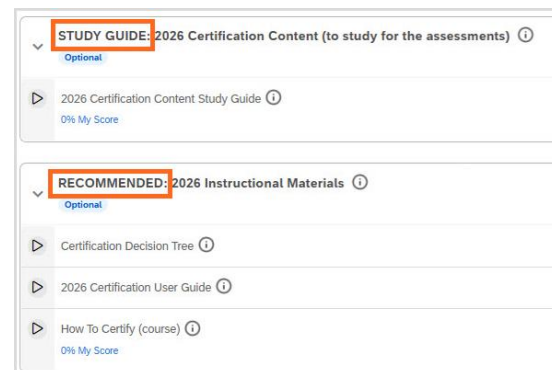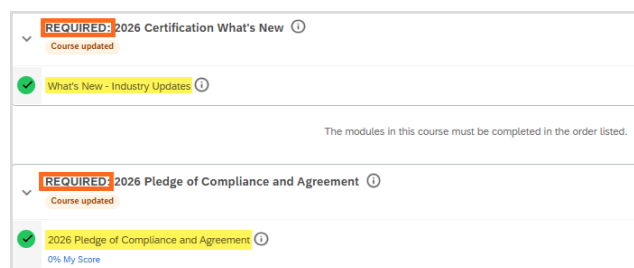

NOTE! The Study Guide is also available from the Home Page in the Certification Study Guide tab all year long as a reference.

3 Complete all the REQUIRED courses:

- What's New document
- Pledge of Compliance
- 3 Base Level Assessments (Medicare Basics, Ethics & Compliance, and AARP).

Six attempts* are allowed on each assessment.

Reviewing the What's New document, completing the Pledge of Compliance and successfully passing all 3 base level assessments with 85% or higher passing score (70% for AARP) will certify you to sell Medicare Advantage (non-SNP) Plans, Prescription Drug Plans, Medicare Supplement Plans, and Standalone Dental, Vision and Hearing Plans.
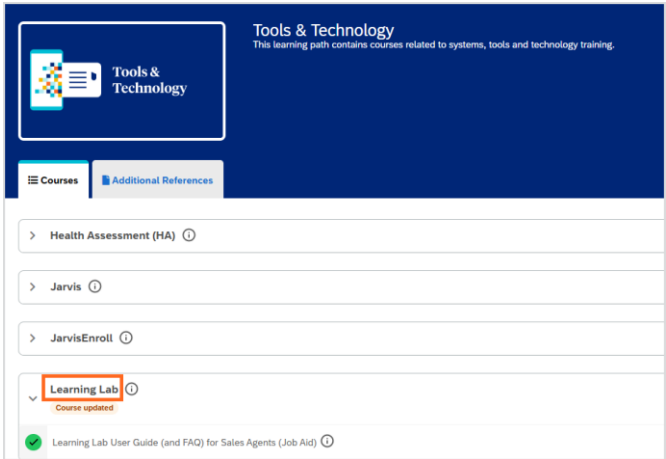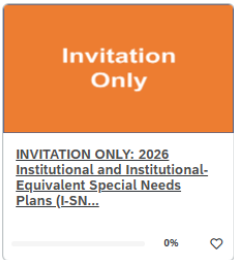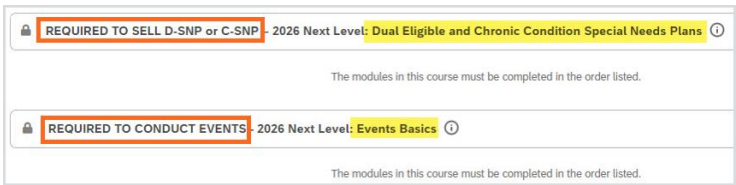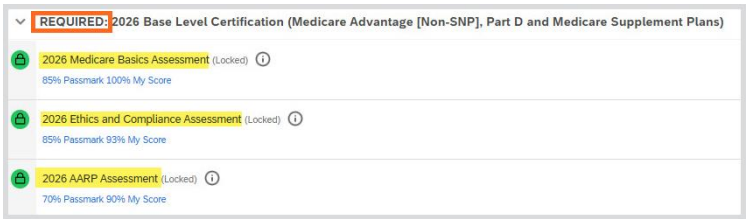
*An attempt is counted when you complete the assessment.

REQUIRED: 2026 Base Level Certification (Medicare Advantage [Non-SNP], Part D and Medicare Supplement Plans)

2026 Medicare Basics Assessment (Locked) ⓘ
85% Passmark 100% My Score

2026 Ethics and Compliance Assessment (Locked) ⓘ
85% Passmark 93% My Score

2026 AARP Assessment (Locked) ⓘ
70% Passmark 90% My Score

4 Complete any Next Level assessments if you wish to certify to sell more than the base level.

For example, if you want to sell D-SNP and/or C-SNP, complete that assessment; if you want to conduct any marketing events, complete the Events Basics module.

If you have been invited to sell any other products, those assessments will appear on your Home Page in a separate course.

🔒 REQUIRED TO SELL D-SNP or C-SNP - 2026 Next Level: Dual Eligible and Chronic Condition Special Needs Plans ⓘ
The modules in this course must be completed in the order listed.

🔒 REQUIRED TO CONDUCT EVENTS - 2026 Next Level: Events Basics ⓘ
The modules in this course must be completed in the order listed.

Invitation Only

INVITATION ONLY: 2026 Institutional and Institutional-Equivalent Special Needs Plans (I-SN...

0% ♡

For detailed information on using Learning Lab, please review the Learning Lab User Guide found on Learning Lab. It is located in the Tools and Technology path or search for it in the Content Library tab.

Tools & Technology
This learning path contains courses related to systems, tools and technology training.

≣ Courses 📄 Additional References

> Health Assessment (HA) ⓘ

> Jarvis ⓘ

> JarvisEnroll ⓘ

> Learning Lab ⓘ
Course updated

✔ Learning Lab User Guide (and FAQ) for Sales Agents (Job Aid) ⓘ

AHIP Certification Instructions

We are pleased to once again accept the AHIP Medicare + Fraud, Waste and Abuse Training from American's Health Insurance Plans. Agents choosing to pursue AHIP via UnitedHealthcare are eligible to receive a $50 discount by using our custom link in Learning Lab.

AHIP instructions will be available in late June 2025.

NABIP Certification Instructions

We are pleased to offer another third-party certification program as a way to earn credit for the UnitedHealthcare Medicare Basics Assessment with a passing score from the National Association of Benefits and Insurance Professionals (NABIP).

NABIP instructions will be available in late June 2025.

Logging into Jarvis

Accessing Jarvis – Registered Users

- Go to **www.uhcjarvis.com**

- Click on **Sign in with One Healthcare ID**

Welcome to Jarvis

All your tools in one place hassle-free. Agents/Brokers sign in:

Sign in with One Healthcare ID

Don't have a One Healthcare ID? Register

- Enter your **One Healthcare ID** and click **Continue**.

- Enter your **password** and click **Continue**

Sign In

One Healthcare ID or Email Address

Forgot One Healthcare ID?

Continue

or

Create One Healthcare ID

Manage My One Healthcare ID

Jarvis | **United Healthcare**

Enter Your Password

One Healthcare ID or Email Address

Password

Forgot Password?

Continue

Back to Sign in

Need Help?
Contact the Producer Help Desk (PHD)

Monday – Friday 7am – 9pm CST

PHD Chat

English 888-381-8581

Español Presione la opción 2

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## Attempts, Results and Progress

ATTEMPTS

Attempts are counted when you complete an assessment. However, if you exit an assessment early and return to take it again, you will need to select **Continue** to resume the prior attempt and complete the assessment.
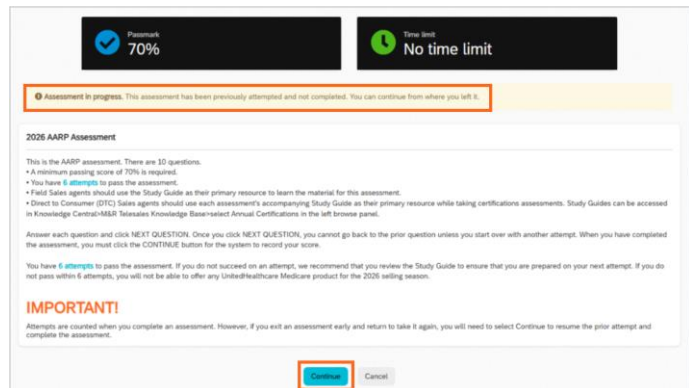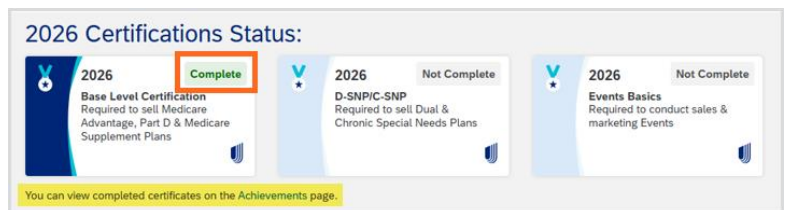

RESULTS AND ACHIEVEMENTS

When you complete an assessment (either pass or fail), you will see the results. You will also be able to download a certificate of completion if the assessment completed the certification path.
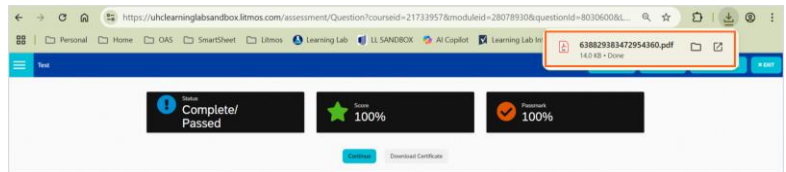
On the certifications page, you will see your status. You will also see a link to the achievements page.

You can also click on the achievements page tab to see your list of completions and download a certificate.
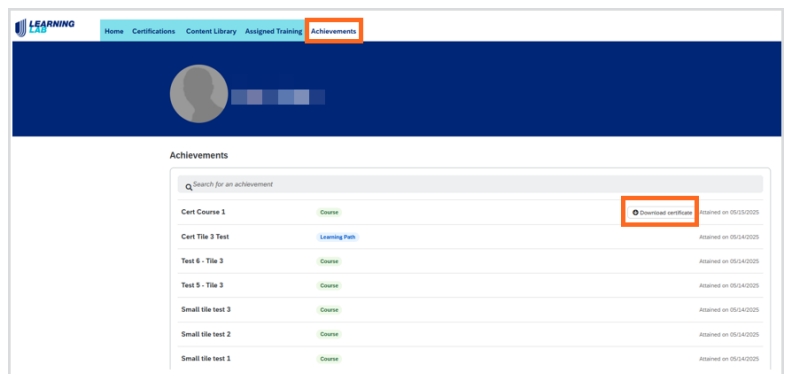
Achievements and Printing Certificates

Note: Certificates are available for Fast Track, Base Level, SNPs, and Events Basics assessments.

To view a list of your completed courses and modules**:**

- Click on the **Achievements** tab.

- A list of all your achievements will appear with the achievement date.

- Click **Download certificate** to obtain a printable copy.

- A PDF of the certificate will appear. Open the PDF and print the certificate.
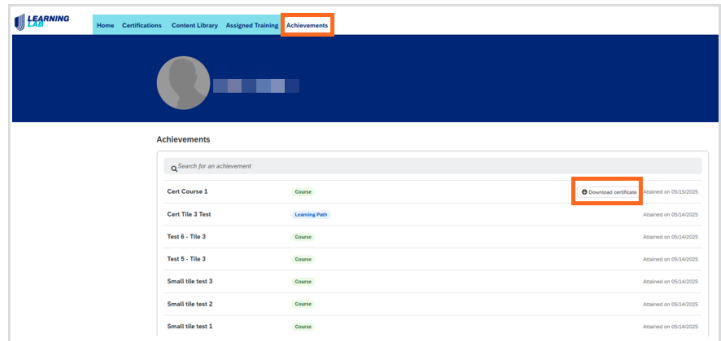
For a quick view of your most recent achievements:

- From the Learning Lab Home page, scroll down to find your recent achievements tile. You can click the forward and back arrows to see the most recent achievements.

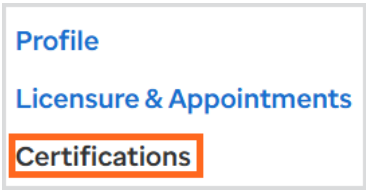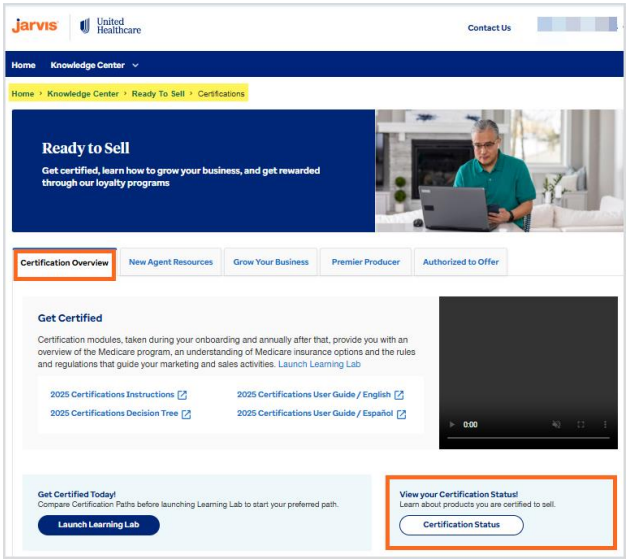- Click on **View All** in the **Recent Achievement** tile to see all achievements.
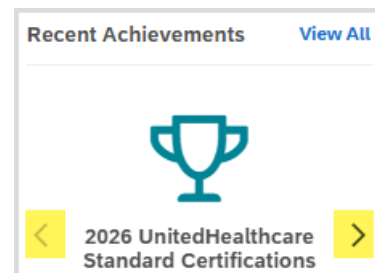
To view a list of your completed certifications on **Jarvis,** go to **Ready to Sell** and click on the **Certification Overview** tab. Then click on the **Certification status.**

OR

From any page in Jarvis, click on your **name** on the top menu bar.

- Click on Manage Profile.

- Click on **Certifications** on the left.

- A list of your current certifications will appear.

Note: If you took Fast Track, you will also see the Base Level and Next Level certifications listed in Jarvis.

Learning Lab System Requirements

For optimized viewing, broadband internet connection is recommended.

Desktop

- Web browser:
  - Microsoft Edge
  - Google Chrome
  - Mozilla Firefox
  - Apple Safari
- JavaScript and cookies enabled

Note: Internet Explorer is not recommended for use with Learning Lab due to compatibility issues.

While not a requirement, Learning Lab is best viewed using a minimum screen resolution of 1024 x 768px.

Mobile Devices

- Apple iOS devices using Safari mobile web browser
- Android devices using Google Chrome mobile web browser

Need Help?
Contact the Producer Help Desk (PHD)

Monday – Friday 7am – 9pm CST

💬 PHD Chat

📞 English 888-381-8581

📞 Español Presione la opción 2

Note: Screen shots are for illustrative purposes only and are subject to change without notice.