



2026 Certifications Decision Tree



I want to sell or conduct...

I must pass these assessments

Base

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

UnitedHealthcare, AARP, Erickson, Peoples Health, Preferred Care Partners, or Preferred Care Networks 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

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