



# 2027 Certification User Guide

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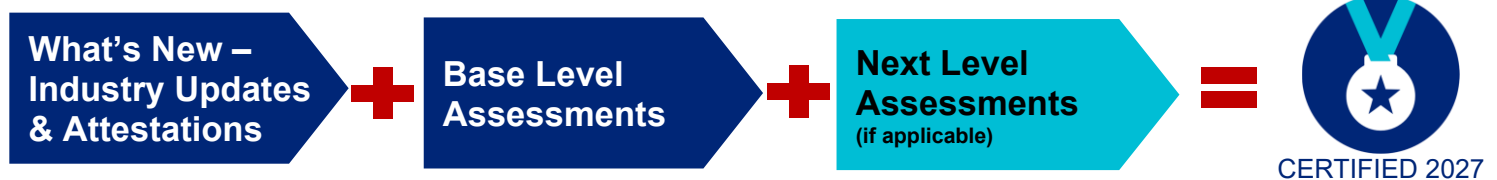
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# 2027 Annual Certification Requirements

## UnitedHealthcare Certification Requirements

To solicit, present or sell any UnitedHealthcare Medicare products (*may include plans branded UnitedHealthcare, AARP, Erickson, Peoples Health, Preferred Care Networks or Preferred Care Partners*), 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.**



A summary of how to certify is as follows:

### Review any *recommended* courses needed:

- The **Study Guide** which contains the content needed to pass the assessments
- The **Certification Checklist and Decision Tree** to help you prepare and 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

### Complete the *required* courses

- Review the **What's New – Industry Updates** document which summarizes key topics that are new for the year
- Review and sign the **2027 Certification Attestations**

### 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 & Compliance, 3) AARP

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

### 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)
  - Senior Care Options
  - One Care



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

# 2027 Certifications Decision Tree

Agents must first review the "What's New – Industry Updates" and agree to the Attestations before taking any assessments.

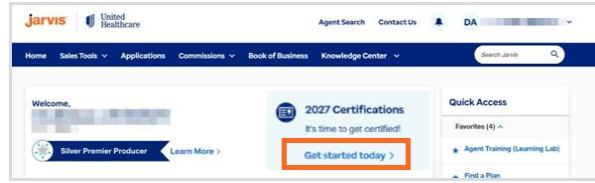
	I want to sell or conduct...	I must pass these assessments
<b>Base Level</b>	<p><b>Medicare Advantage Plans (MA) non-SNP</b> UnitedHealthcare, AARP, Erickson, Peoples Health, Preferred Care Networks or Preferred Care Partners branded plans</p> <p><b>AARP Prescription Drug Plans (PDP)</b></p> <p><b>AARP Medicare Supplement Insurance Plans</b></p>	<p><b>Successfully pass all 3 Base Level assessments:</b></p> <ul style="list-style-type: none"> <li>▶ Medicare Basics (or transfer AHIP or NABIP passing score)</li> <li>▶ Ethics and Compliance</li> <li>▶ AARP</li> </ul>
<b>Next Level</b>	<p><b>Dual Eligible Special Needs Plans and/ or Chronic Condition Special Needs Plans (D-SNP/C-SNP)</b> UnitedHealthcare, Erickson, Preferred Care Networks and Preferred Care Partners</p>	<p>Successfully pass all Base Level assessments <b>AND</b> Dual Eligible and Chronic Condition Special Needs Plans (D-SNP/C-SNP) assessment</p>
<b>Next Level</b>	<p><b>Events Basics</b> To conduct marketing/sales events, host a retail kiosk, or conduct a community meeting</p>	<p>Successfully pass all Base Level assessments <b>AND</b> the Events Basics module</p>
<b>Next Level</b>	<p><b>Institutional and Institutional-Equivalent Special Needs Plans (I-SNP/IE-SNP)</b></p>	<p>Successfully pass all Base Level assessments <b>AND</b> Institutional and Institutional-Equivalent Special Needs Plans (I-SNP/IE-SNP) assessment <i>(available by invitation only)</i></p>
<b>Next Level</b>	<p><b>Senior Care Options</b> UnitedHealthcare</p>	<p>Successfully pass all Base Level assessments <b>AND</b> Senior Care Options assessment <i>(available by invitation only)</i></p>
<b>Next Level</b>	<p><b>One Care</b> UnitedHealthcare</p>	<p>Successfully pass all Base Level assessments <b>AND</b> One Care assessment <i>(available by invitation only)</i></p>

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**AHIP or NABIP Certification for our EDC Partners**  
 America's Health Insurance Plans (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 Insurance Plans). *See instructions provided in this guide.*

# Certification Instructions – Standard

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**.



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

**Ready to Sell**  
Get certified, learn how to grow your business, and get rewarded through our loyalty programs

**Certification Overview** | New Agent Resources | Grow Your Business | Premier Producer

**Get Certified Today!**  
Compare Certification Paths before launching Learning Lab to start your preferred path.  
**Launch Learning Lab**

**View your Certification Status!**  
Learn about products you are certified to sell.  
Certification Status

**Get Certified**  
Certification modules, taken during your onboarding and annually after that, provide you with an overview of the Medicare program, an understanding of Medicare insurance options and the rules and regulations that guide your marketing and sales activities.

- 2027 Certifications Instructions
- 2027 Certifications User Guide / English
- 2027 Certifications Decision Tree
- 2027 Certifications User Guide / Español

**2027 Certification paths**  
Choose your preferred certification path, you only need to complete one path to certify!

	Fast Track	Standard	AHIP	NABIP
Launch Date	06/01/2026	06/08/2026	Late June	Late June
Overview	Fast Track Combines Base Level & Next Level Assessments into one	Standard Certifications Path	Agents who want to transfer AHIP use this path	Agents who want to transfer NABIP use this path
Eligibility	Premier Agents and Fast Track Qualifications	All Agents	Agents transferring AHIP	Agents transferring NABIP
Language Available	English	English/Español	English/Español	English/Español
Attempts Allowed per Assessment	2	6	6	6
Base Level Assessments: Certifies you to sell UnitedHealthcare Medicare Advantage (non-SNP), Part D and Medicare Supplement Plans	Fast track	Standard	AHIP	NABIP
Medicare Basics Assessment	AI-In-One Assessment 85% Passing Score	85% Passing Score	Credit with AHIP Transfer	Credit with NABIP Transfer
Ethics and Compliance Assessment		85% Passing Score	85% Passing Score	85% Passing Score
AARP Assessment		70% Passing Score	70% Passing Score	70% Passing Score
Next Level Assessments/Modules: After you successfully pass all Base Level assessments, you may then take any of the Next Level requirements to sell D-SNP/C-SNP and conduct sales/marketing events		85% Passing Score	85% Passing Score	85% Passing Score
D-SNP /C-SNP Assessment		85% Passing Score	85% Passing Score	85% Passing Score
Events Basics (Module Only)		Complete Module	Complete Module	Complete Module

*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.

2027 Certifications Status:

2027 Complete Base Level Certification Required to sell Medicare Advantage, Part D & Medicare Supplement Plans

2027 Complete D-SNP/IC-SNP Required to sell Dual & Chronic Special Needs Plans

2027 Complete Events Basics Required to conduct sales & marketing Events

Allow up to 5 minutes for your certification status to update. You can view completed certificates on the Achievements page.

English Spanish

Below are your certification path options! Remember, you only need to complete 1 path.

UnitedHealthcare 2027 Certifications Fast Track Path

2027 UnitedHealthcare Fast Track Certification  
You are eligible for Fast Track! This path combines Base Level to sell MA, Part D, Medicare Supplement and Next Level to sell D-SNP/IC-SNP and conduct events.

UnitedHealthcare 2027 Certifications Standard Path

2027 UnitedHealthcare Standard Certifications  
Complete Base Level to sell MA (Non-SNP), Part D, Medicare Supplement.  
Complete Next Level to sell D-SNP/IC-SNP and conduct events.

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 a different path, click the back button and select a different path.

*Note: If you are eligible for **Fast Track Certification**, please see the instructions at the end of this section.*

2027 UnitedHealthcare Standard Certifications

This path includes recommended and required materials for Base Level and Next Level assessments. You have 6 attempts to pass the assessments with a score of 85% or higher.

**Recommended:**

- Instructional Materials (User Guide, Decision Tree, Certification Path video)

**Required for all agents:**

- Study Guide (the content you need to study to pass the required assessments)
- Step 1: What's New - Industry Updates (review to help you know what is new this year)
- Step 2: Certification Attestations (Pledge of Compliance and D-SNP state specifics)

**Base Level Certification:**

- Step 3: Medicare Basics Assessment
- Step 4: Ethics and Compliance Assessment
- Step 5: AARP Assessment

Successfully passing all the Base Level assessments will certify you to sell Medicare Advantage (non-SNP), Part D and Medicare Supplement Plans.

**Next Level Certification:**

- Dual Eligible Special Needs and Chronic Condition Special Needs Plans Assessment passed (if you want to certify to sell D-SNP/IC-SNP)
- Events Basics module must be completed if you want to conduct and report marketing/sales events

Note: If you have been invited to sell I-SNP/VE-SNP, Senior Care Options or One Care, you will see these courses on your Certifications Page.

Below the description, you will see some **RECOMMENDED courses**. These are optional but highly recommended.

RECOMMENDED: 2027 Instructional Materials ⓘ

Optional

- ▶ 2027 Certification Checklist and Decision Tree ⓘ
- ▶ 2027 Certification User Guide ⓘ
- ▶ Path Comparison Video ⓘ

Complete all the **REQUIRED courses**:

- Certification Content Study Guide (optional)
- What's New – Industry Updates document
- Certification Attestations
- 3 Base Level Assessments (Medicare Basics, Ethics & Compliance, and AARP).

Six attempts are allowed on each assessment. (An attempt is counted when you complete the assessment.)

REQUIRED: 2027 Base Level Certification (Medicare Advantage [Non-SNP], Part D and Medicare Supplement Plans) ⓘ

- ▶ 2027 Certification Content Study Guide ⓘ  
Optional
- ▶ 2027 Step 1: What's New - Industry Updates ⓘ
- 🔒 2027 Step 2: Certification Attestations Locked ⓘ
- 🔒 2027 Step 3: Medicare Basics Assessment Locked ⓘ
- 🔒 2027 Step 4: Ethics and Compliance Assessment Locked ⓘ
- 🔒 2027 Step 5: AARP Assessment Locked ⓘ

Reviewing the What's New – Industry Updates document, completing the Attestations 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 and Medicare Supplement Plans.



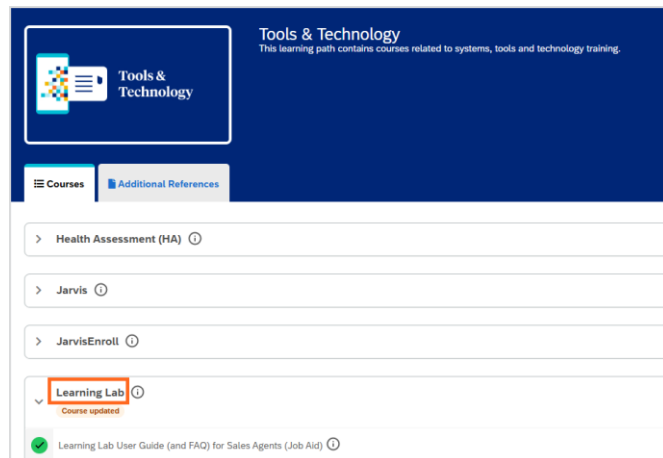
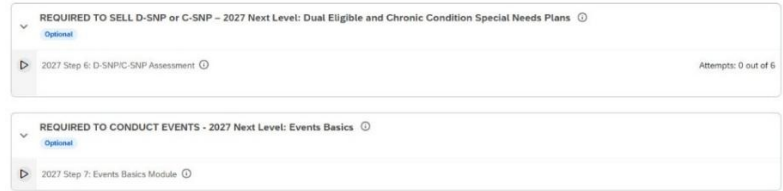
**NOTE!** The Study Guide is also available from the Home Page in the Certification Study Guide tab all year long as a reference.

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 called Invitation Only.

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.



## Certification Instructions – Fast Track

If you are eligible for Fast Track Certification, use the Fast Track Path in Learning Lab.

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



**2027 UnitedHealthcare Fast Track Certification**  
Congratulations! You are eligible and invited to take a single Fast Track certification assessment. You have 2 attempts to pass this assessment with a score of 85% or higher.

Successfully passing this assessment will give you credit for all Base Level and Next Level assessments and will certify you:

- To sell Medicare Advantage (non-SNP), Part D, Medicare Supplement, Dual Eligible Special Needs and Chronic Condition Special Needs Plans
- To conduct and report marketing/sales events

By passing the Fast Track assessment, you do not need to take the Standard Path or transfer AHIP/NABIP.

However, if you fail both attempts of the Fast Track assessment, you are entitled to 6 attempts of each assessment within the Standard Certification Path (or AHIP/NABIP). Agents who fail all attempts of an assessment in the standard certification path are not permitted to take the Fast Track option.

Note: You are not required to take the Fast Track assessment and may elect to take the Standard Certification Path instead (or the AHIP or NABIP Path). If you have been invited to sell I-SNP/IE-SNP, Senior Care Options or One Care, you will see these courses on your Certifications Page.

Below the description, you will see some courses. Complete all the **REQUIRED** courses:

- Certification Content Study Guide (optional)
- What's New – Industry Updates document
- Certification Attestations
- Fast Track Assessment



2027 UnitedHealthcare Fast Track Certification (Base Level: Medicare Advantage, Part D, Medicare Supplement and Next Level: D-SNP/IC-SNP, Events Basics)	
2027 Certification Content Study Guide	Optional
2027 Step 1: What's New - Industry Updates	
2027 Step 2: Certification Attestations	
2027 Step 3: Fast Track Assessment	Attempts: 0 out of 2

Reviewing the What's New – Industry Updates document, completing the Attestations and successfully passing the Fast Track Assessment with an 85% or higher score will give you credit for all Base Level and Next Level assessments and will certify you:

- To sell Medicare Advantage (non-SNP), Part D, Medicare Supplement, Dual Eligible Special Needs and Chronic Condition Special Needs Plans
- To conduct and report marketing/sales events

*Successfully passing Fast Track does not provide credit for any invitation only modules such as I/IE-SNP, Senior Care Options or One Care.*



# AHIP Certification Instructions

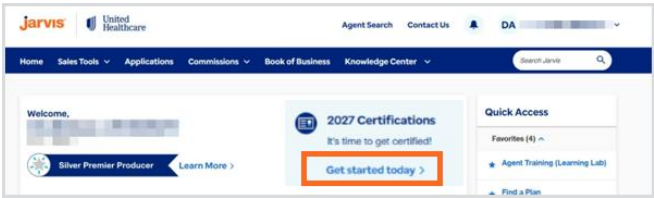
We are pleased to once again accept the AHIP Medicare + Fraud, Waste and Abuse Training from American’s Health Insurance Plans. Agents choosing to pursue AHIP via UnitedHealthcare are eligible to receive a \$50 discount by using our custom link in Learning Lab.

Per policy, agents choosing to certify via AHIP must obtain a minimum score of 90% within six attempts. Each purchase consists of three attempts (UnitedHealthcare only acknowledges the initial two purchases).

All agents are required to review the **What’s New – Industry Updates** document and sign the **Certification Attestations**. Agents certifying via the AHIP path must transfer a passing AHIP score (via our custom link) and then complete the remaining **Base Level** certification assessments: Ethics & Compliance and AARP. Passing all three will certify you to sell MA (non-SNP) Plans, Prescription Drug Plans (PDP) and Medicare Supplement Plans. (AHIP Certification satisfies the requirement for the UnitedHealthcare Medicare Basics Assessment.)

**REMINDER:** For agents choosing to complete the 2027 AHIP, either directly from the AHIP website or through another carrier, you are still required to follow the below directions to transmit your results to UnitedHealthcare and receive credit for the equivalents. The UnitedHealthcare discount will be forfeited if you choose to certify directly from the AHIP website or through another carrier.

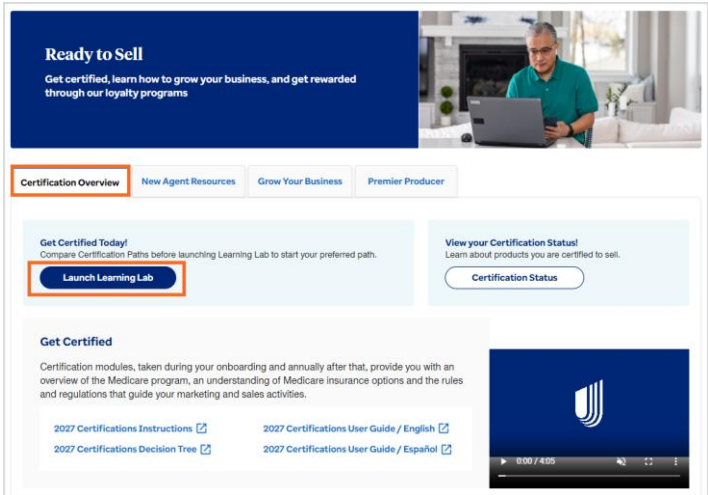
From Jarvis, click on the Certification **Get Started** tile to begin.



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



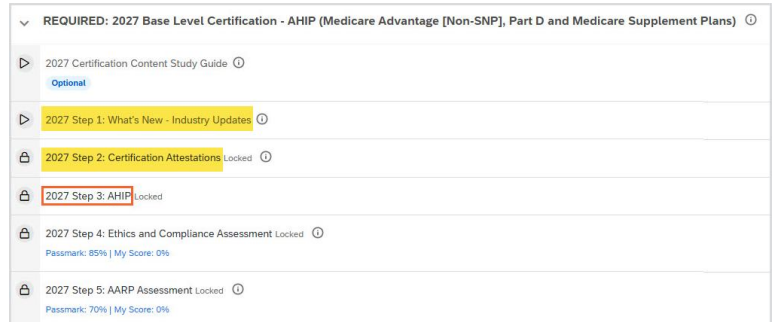
Click on the **Launch Learning Lab** button to take you to the Certification paths.



You will see the AHIP Certification learning path. Click on the AHIP path to open it.

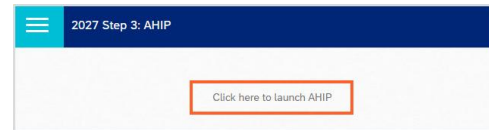


Review the **What's New – Industry Updates** and complete the **Certification Attestations**.



Click on the **2027 AHIP** module.

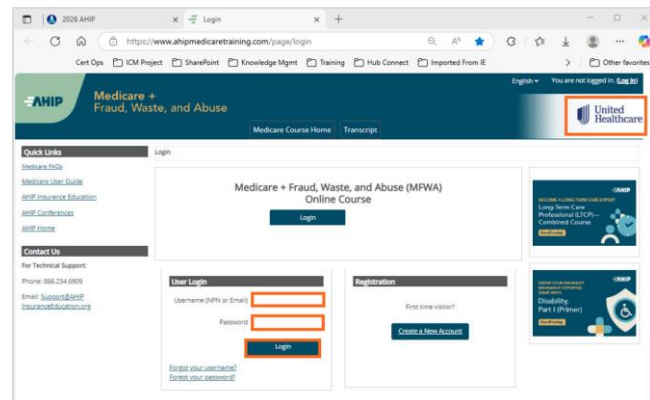
Click on **Click here to launch AHIP**.



A new tab will open on the AHIP website displaying the UnitedHealthcare logo in the upper right corner.

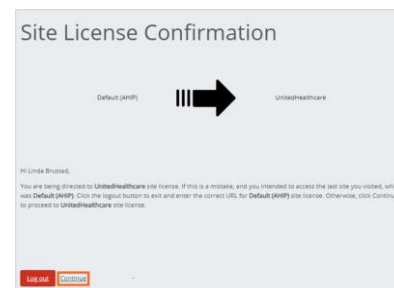


In the User Login section, enter your **AHIP Username** and **Password** and click the **Login** button.



If you haven't set up an AHIP account yet, you will need to complete the Registration process first.

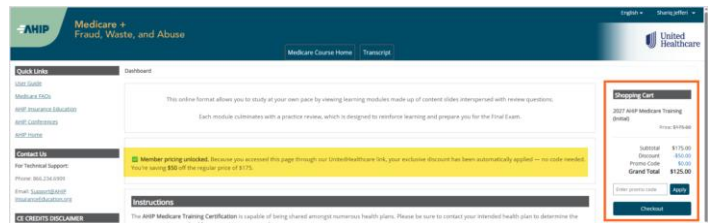
If you receive a pop-up message directing you to the UnitedHealthcare site license, click **Continue**.



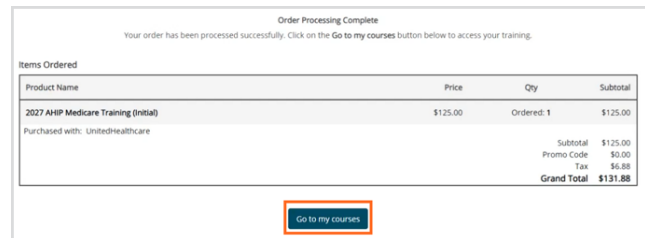
If you require assistance with your AHIP purchase, please refer to the **Medicare User Guide** located on the AHIP site.



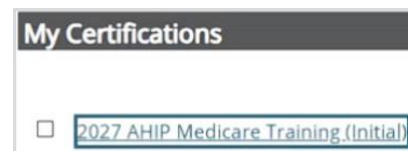
When you log in, you will land on the AHIP Home Page and will see the \$50 UnitedHealthcare discount has been applied in your shopping cart. In the **shopping cart**, click **Checkout** to pay for the training course. Click **place order** to complete your order.



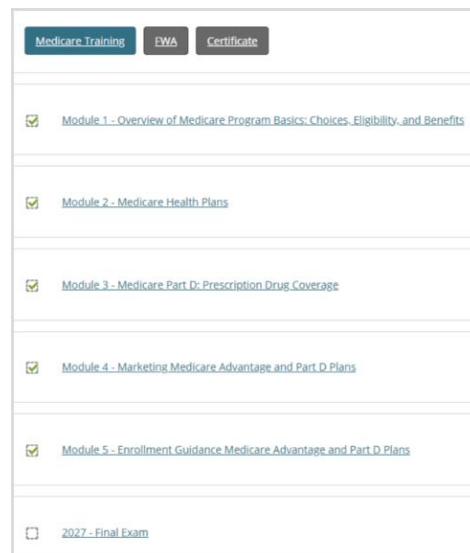
Complete the AHIP courses. There are 2 courses: Medicare Training and Fraud, Waste and Abuse Training. Each course may have multiple modules in it. Begin by clicking **Go to my courses**.



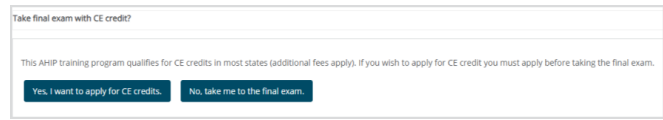
The AHIP Medicare training will appear first.



Complete each module in the Medicare course. Click Submit when you are done with each module. There will be a check mark next to each completed module.



At the end of the Medicare course there will be a final exam to pass. It will ask you if you want CE credits. Answer yes or no.



Take final exam with CE credit?

This AHIP training program qualifies for CE credits in most states (additional fees apply). If you wish to apply for CE credit you must apply before taking the final exam.

[Yes, I want to apply for CE credits.](#) [No, take me to the final exam.](#)

*Note: You will have 3 attempts to pass the AHIP Medicare exam at 90% with the option to purchase 3 more attempts. UnitedHealthcare allows 6 attempts or 2 AHIP purchases.*

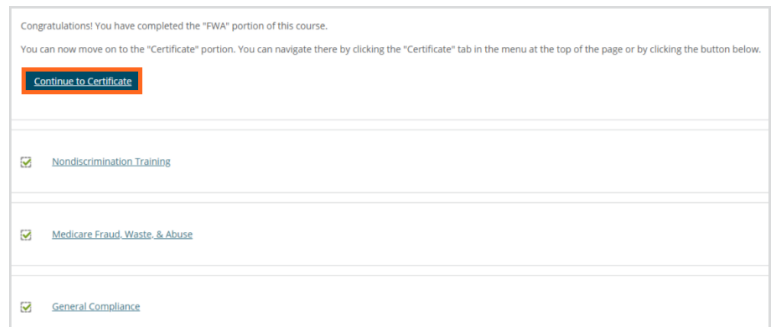
After completing the Medicare course, continue to the fraud, waste and abuse course and any exams by following the same process.



Congratulations! You have completed the "Medicare Training" portion of this course. You can now move on to the "Fraud, Waste, and Abuse" (FWA) portion. You can navigate there by clicking the "FWA" tab in the menu at the top of the page or by clicking the button below.

[Continue to FWA](#)

When you have successfully completed both courses, you'll see a certificate is now available. You can view and print your certificate if you would like to.

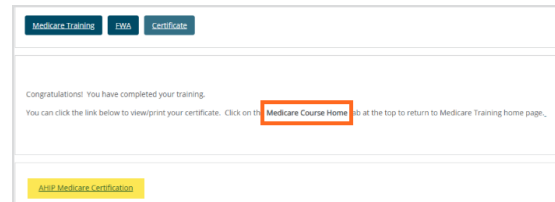


Congratulations! You have completed the "FWA" portion of this course. You can now move on to the "Certificate" portion. You can navigate there by clicking the "Certificate" tab in the menu at the top of the page or by clicking the button below.

[Continue to Certificate](#)

- Nondiscrimination Training
- Medicare Fraud, Waste, & Abuse
- General Compliance

Then return to Home Page by clicking the Medicare Course Home page button.

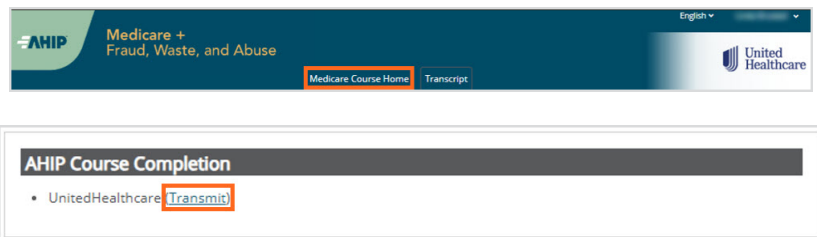


Medicare Training FWA Certificate

Congratulations! You have completed your training. You can click the link below to view/print your certificate. Click on the [Medicare Course Home](#) tab at the top to return to Medicare Training home page.

[View/Print Certificate](#)

To send your results to UnitedHealthcare go to the **Medicare Course Home** tab, scroll to the bottom of the screen to click the **UnitedHealthcare (Transmit)** link.



AHIP Medicare + Fraud, Waste, and Abuse

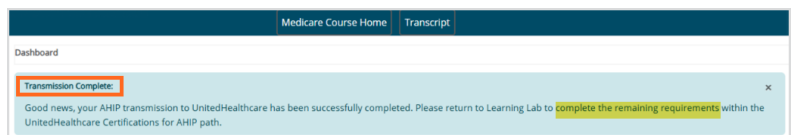
[Medicare Course Home](#) [Transmit](#)

UnitedHealthcare

### AHIP Course Completion

- UnitedHealthcare [Transmit](#)

You will see a message that says you have successfully completed the transmission and reminds you to return to Learning Lab and complete the remaining UnitedHealthcare certification requirements to be fully certified.



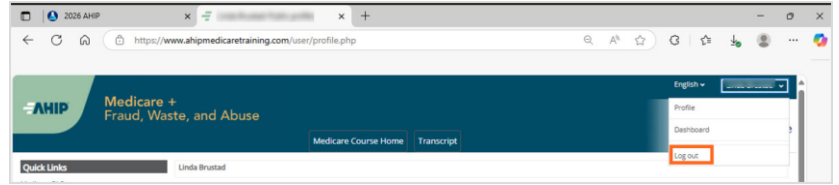
Dashboard

[Transmission Complete:](#)

Good news, your AHIP transmission to UnitedHealthcare has been successfully completed. Please return to Learning Lab to [complete the remaining requirements](#) within the UnitedHealthcare Certifications for AHIP path.



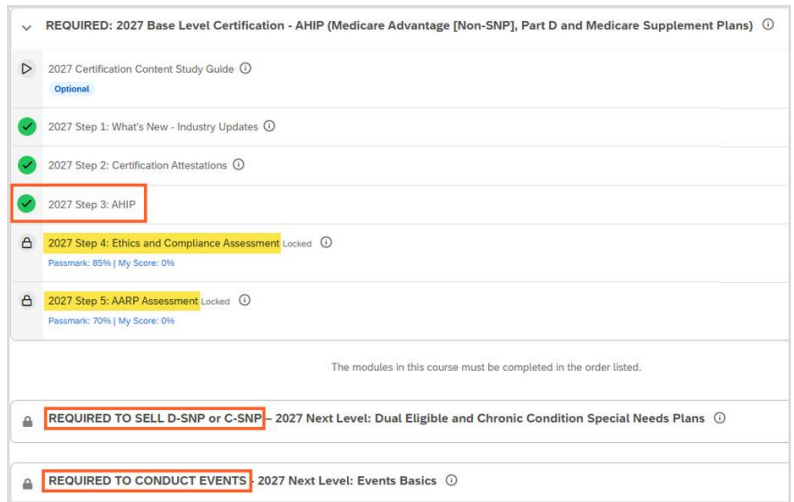
Log out of your AHIP account and close the AHIP tab.



On the Learning Lab tab, click the **EXIT** button to return to the main page where the 2027 AHIP will appear completed upon successful transmission.



A green checkmark will indicate that your AHIP score was transferred to UnitedHealthcare.



Proceed with completing the remaining **REQUIRED Base Level** assessments as well as any **Next Level** assessments if you wish to certify to sell more than the **Base Level**.



# NABIP Certification Instructions

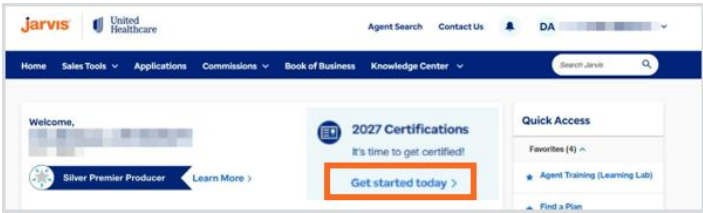
We are pleased to offer another third-party certification program as a way to earn credit for the UnitedHealthcare Medicare Basics Assessment with a passing score from the National Association of Benefits and Insurance Professionals (NABIP).

Per policy, agents choosing to certify via NABIP must obtain a minimum score of 85% within six attempts. Each purchase consists of six attempts.

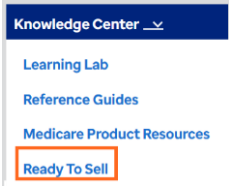
All agents are required to review the **What's New – Industry Updates** document and sign the **Certification Attestations**. Agents certifying via the NABIP path must transfer a passing NABIP score (via our custom link) and then complete the remaining **Base Level** certification assessments: Ethics & Compliance and AARP. Passing all three will certify you to sell MA (non-SNP), Prescription Drug Plans (PDP) and Medicare Supplement Plans. *(NABIP Certification satisfies the requirement for the UnitedHealthcare Medicare Basics Assessment.)*

**REMINDER:** For agents who purchase the 2027 NABIP training through the UnitedHealthcare link, the completion will be reported to UnitedHealthcare upon passing the final exam. However, agents who choose to purchase and complete their 2027 NABIP training outside of UnitedHealthcare (e.g., either directly from the NABIP website or another carrier) will need to contact the Producer Help Desk (PHD) to submit a request to transfer their results.

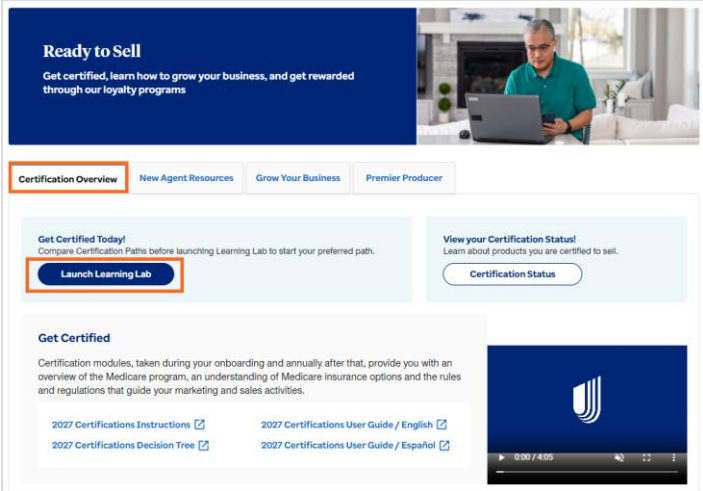
From Jarvis, click on the Certification **Get Started** tile to begin.



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



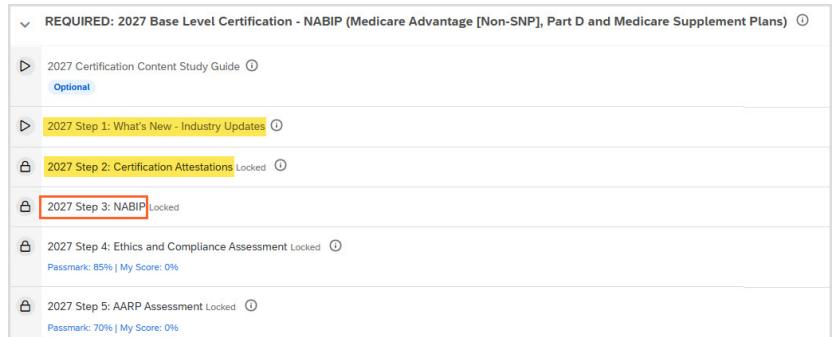
Click on the **Launch Learning Lab** button to take you to the Certification paths.



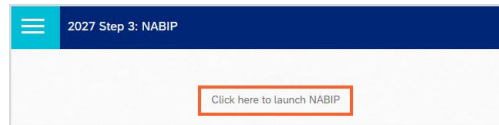
You will see the NABIP Certification learning path. Click on the NABIP path to open it.



Review the **What's New – Industry Updates** and complete the **Pledge of Compliance**.

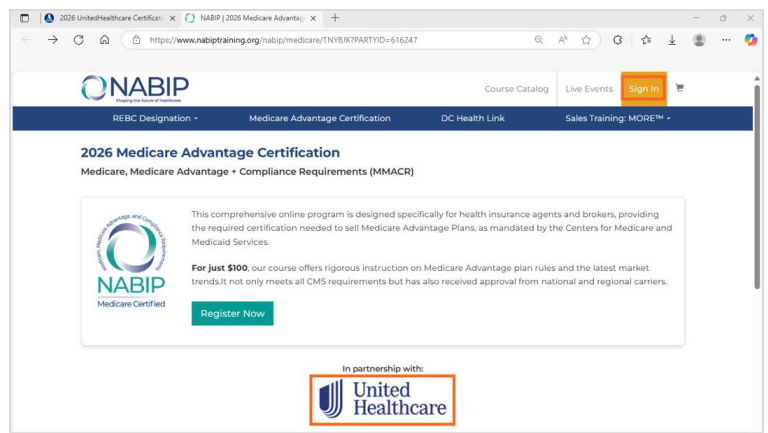


Click on the **2027 NABIP** module.



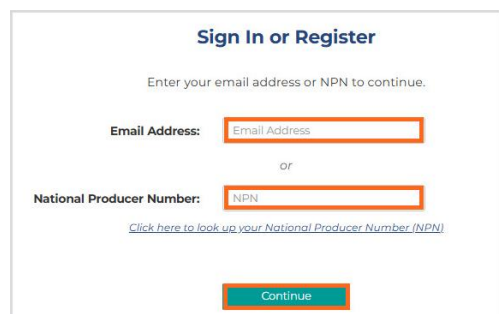
Click on **Click here to launch NABIP**.

A new tab will open on the NABIP website displaying the UnitedHealthcare logo. Click the **Sign In** button appearing in the upper right corner.



On the **Sign In** page, you can enter your login credentials.

If you require assistance with your login credentials, please email [support@nabiptraining.org](mailto:support@nabiptraining.org) or call the NABIP Student Services Helpdesk at 844-257-0990 (Option 6).



To purchase NABIP training, click on the **Register Now** button.

The screenshot shows the NABIP website interface. At the top, there are navigation links for 'Course Catalog', 'Live Events', 'Sign In', and a shopping cart icon. Below the navigation is a blue header with 'REBC Designation', 'Medicare Advantage Certification', 'DC Health Link', and 'Sales Training: MORE™'. The main content area is titled '2026 Medicare Advantage Certification' and 'Medicare, Medicare Advantage + Compliance Requirements (MMACR)'. It features a circular logo with 'NABIP Medicare Certified' and a 'Register Now' button. Text describes the course as comprehensive and designed for health insurance agents. A price of '\$100.00' is mentioned. At the bottom, it says 'In partnership with: United Healthcare'.

Click the **Add to Cart** button.

This screenshot shows a detailed view of the 'NABIP Certified' course. The title is 'NABIP Certified Medicare, Medicare Advantage and Compliance Requirements 2026'. A green 'Add to Cart' button is highlighted in the top right corner, with the price '\$100.00' displayed below it. The text describes the course's purpose: to provide a quality certification that meets CMS requirements while reducing the time commitment of veteran agents. It lists learning objectives such as 'All CMS requirements for Medicare Certification', 'Most Common Compliance Issues Facing Plan Sponsors and Agents', 'Changes in CMS Guidelines', 'Trends in the Marketplace', and 'Medicare Supplement'.

Follow the prompts to Add or Decline insurance continuing education (CE).

The screenshot shows the 'Insurance CE' selection screen. It prompts the user to 'Add or Decline' insurance continuing education (CE). A list of bullet points provides instructions: 'There is no additional cost for this credit to be applied.', 'Some states may require a proctored exam if insurance CE is selected.', and 'You must be a licensed insurance producer to add this credit type.' Below this, there is a section for 'To Add credit' with a dropdown menu labeled 'Insurance Continuing Education' and a green 'Add' button. A note states: 'If your state is not listed in the dropdown then it is not currently approved for insurance CE. If you would like insurance CE then please contact our office at support@nabiptraining.org to find out the status of CE in your state. CE cannot be granted in states that are not approved and cannot be added after the fact so you must elect your credit now prior to completing the course.' At the bottom, there is a section for 'To Decline credit' with a red 'Decline' button.

After you have made your selection for insurance CE, click on the **Continue with these Credit Choices** button which will add the course to your cart.

You may now continue to browse the training catalog or complete the checkout process.

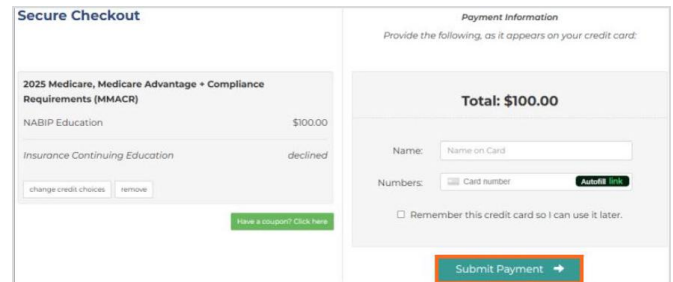
This screenshot shows the 'Continue with these Credit Choices' screen. It has a title '2025 Medicare, Medicare Advantage + Compliance Requirements (MMACR)'. The text states: 'Completion of this course can earn you multiple types of credit towards licenses you hold. Please tell us which credits you wish to receive. For each credit option below you must click either the green or red button to add or decline that credit. Upon completion of your course you will receive all of the credits that you select here, but any declined credits will NOT be earned.' There are two rows: the first is 'Added to Cart' for 'NABIP Education' at '\$100.00' with a note 'For credit, course must be completed by: 06/30/2025'; the second is 'Declined' for 'Insurance Continuing Education'. Below the 'Declined' row is a 'Click To Add' button and a section titled 'Do I Need This Credit?' with a note: 'Are you a licensed insurance producer? If you would like your course credit reported to your state and posted to your insurance license transcript then you must select this credit type. click to learn more'. At the bottom is a green 'Continue With These Credit Choices' button with a right arrow.



To finish your purchase, click the **Proceed to Checkout** button.



You are now on a secure checkout screen. Enter your name and credit card information in the boxes on the right side of the screen and click the **Submit Payment** button.

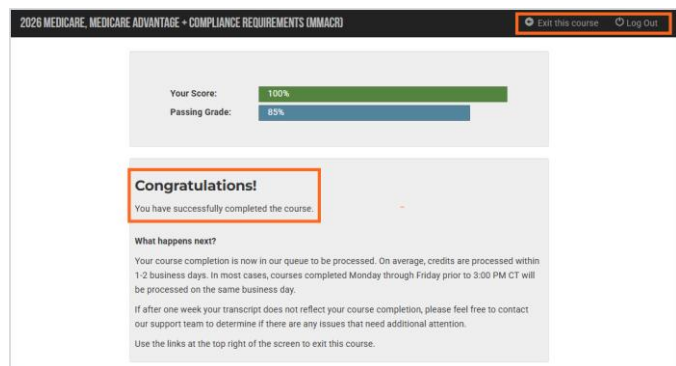


Your course has now been purchased. After a successful transaction, you will be shown a summary screen of your purchase and confirmation email will be sent to you. From here you can launch the course by clicking on the **Launch Course** button.



If you require assistance with your purchase transaction, please email [support@nabiptraining.org](mailto:support@nabiptraining.org) or call the NABIP Student Services Helpdesk at 844-257-0990 (Option 6).

Upon successfully completing the final exam the results will automatically be sent to UnitedHealthcare. **Log out** of your NABIP account and close the NABIP tab.



On the Learning Lab tab, click the **EXIT** button to return to the main page where the 2027 NABIP will appear completed upon successful transmission.



A green checkmark will indicate that your NABIP score was transferred to UnitedHealthcare.

Proceed with completing the remaining **REQUIRED Base Level** assessments as well as any **Next Level** assessments if you wish to certify to sell more than the **Base Level**.

REQUIRED: 2027 Base Level Certification - NABIP (Medicare Advantage [Non-SNP], Part D and Medicare Supplement Plans) ⓘ

2027 Certification Content Study Guide ⓘ  
Optional

2027 Step 1: What's New - Industry Updates ⓘ

2027 Step 2: Certification Attestations ⓘ

2027 Step 3: NABIP ⓘ

2027 Step 4: Ethics and Compliance Assessment Locked ⓘ  
Passmark: 85% | My Score: 0%

2027 Step 5: AARP Assessment Locked ⓘ  
Passmark: 70% | My Score: 0%

The modules in this course must be completed in the order listed.

REQUIRED TO SELL D-SNP or C-SNP - 2027 Next Level: Dual Eligible and Chronic Condition Special Needs Plans ⓘ

REQUIRED TO CONDUCT EVENTS - 2027 Next Level: Events Basics ⓘ



# Logging into Jarvis

## Accessing Jarvis – Registered Users

- Go to [www.uhcjarvis.com](http://www.uhcjarvis.com)
- Click on **Sign in with One Healthcare ID**

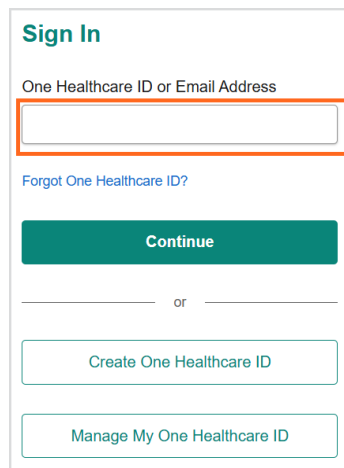


**Welcome to Jarvis**  
All your tools in one place hassle-free. Agents/Brokers sign in:

[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

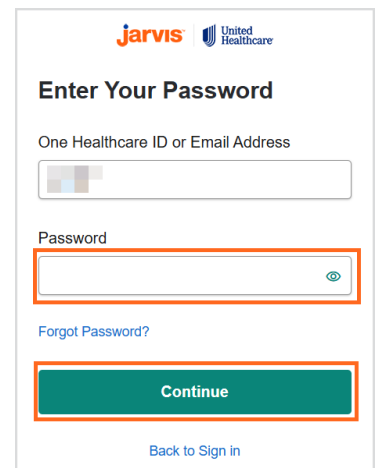
[Forgot One Healthcare ID?](#)


[Continue](#)

or

[Create One Healthcare ID](#)

[Manage My One Healthcare ID](#)



**jarvis** 

**Enter Your Password**

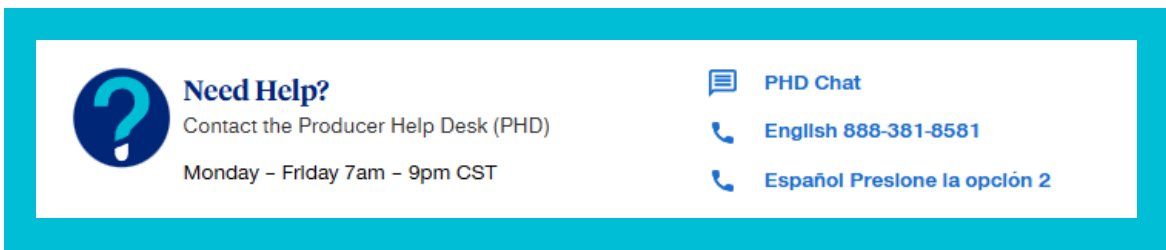
One Healthcare ID or Email Address


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](#)

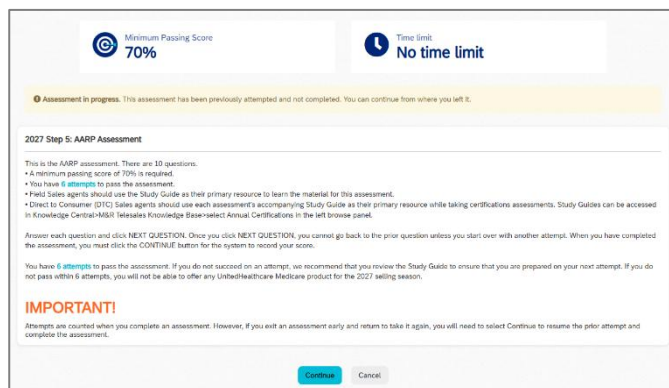
 [Español Preslone la opción 2](#)



# Attempts, Results and Progress

## ATTEMPTS

Attempts are counted when you complete an assessment. 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.

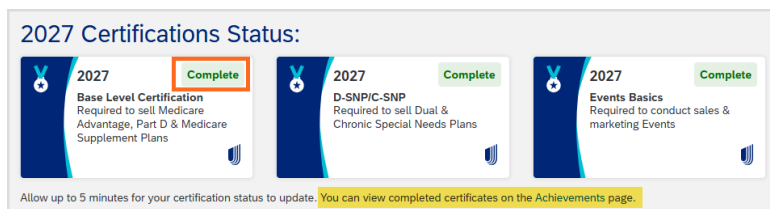


## RESULTS AND ACHIEVEMENTS

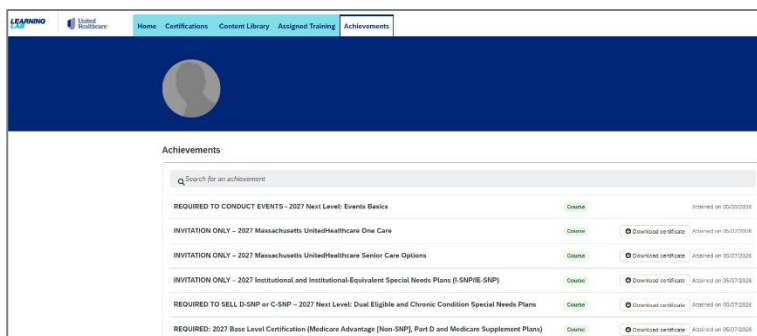
When you complete an assessment (either pass or fail), you will see the results. You will also be able to download a certificate of completion if the assessment completed the certification path.



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.



Field and eAlliance agents will receive email confirmation when the following certification steps or paths are complete:

- AHIP/NABIP score has been successfully transmitted
- Fast Track Path has been successfully completed
- Standard, AHIP or NABIP Path has been successfully completed (sent when the last module, Events Basics, is complete)

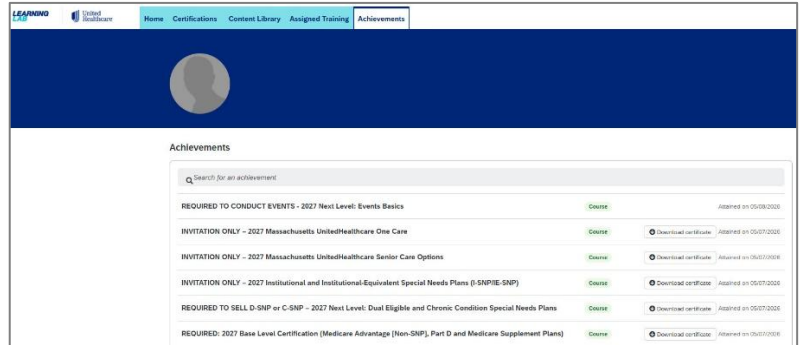


# Achievements and Printing Certificates

Note: Certificates are available for Fast Track, Base Level, C/D-SNPs, Events Basics, and invitation only assessments.

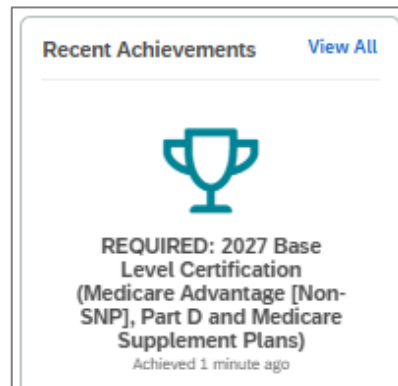
To view a list of your completed courses and modules:

- 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.

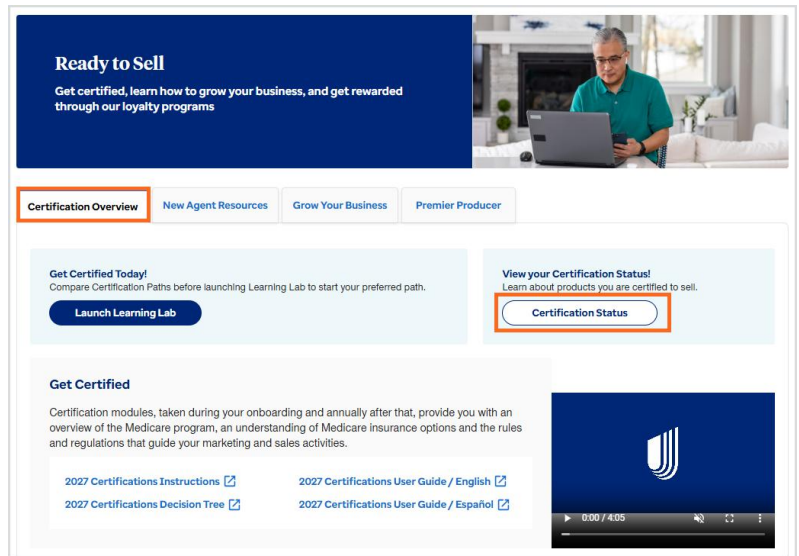


For a quick view of your most recent achievements:

- 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

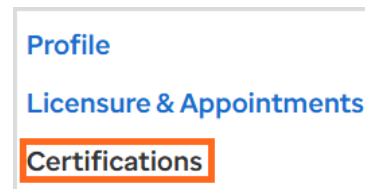
From any page in Jarvis, click on your **name** on the top menu bar.



- Click on Manage Profile.



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



- A list of your current certifications will appear.

Current Certifications			Results per page 15
Year	Certificate Name	Completion Date	

*Note: If you take 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

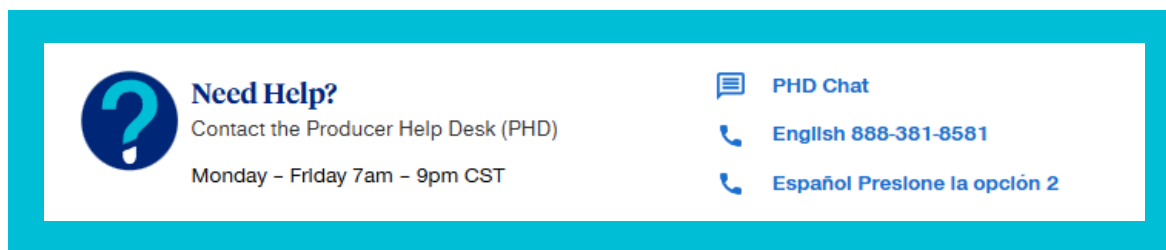
- Web browser:
  - Microsoft Edge
  - Google Chrome
  - Mozilla Firefox
  - Apple Safari
- JavaScript and cookies enabled


*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.*

