

2026 AEP Playbook



We're here to support you with helpful tools and information to prepare for a successful Annual Enrollment Period (AEP).

Strategic Overview

This interactive playbook is your strategic companion for the upcoming Annual Enrollment Period (AEP). Inside, you'll find essential insights, tools, and resources to help you prepare. Below are the topics covered.



Unlock the Power of Jarvis

Stay sharp with the latest plan insights and product knowledge to better serve your clients. Streamline your workflow by unlocking the full potential of your go-to agent platform.



Retain with Confidence

Review strategies to help retain your clients keeping them feeling supported. Explore a timeline of touchpoints leading up to AEP.



Gear up for What's Next

Craft a plan that helps engage consumers and retain your members. Set your goals, map your actions, and get ready to make this AEP a successful one.



Please keep in mind that you must reference your Agent Guide, Centers for Medicare & Medicaid Services (CMS), and UnitedHealthcare resources for applicable requirements.





Unlock the Power of Jarvis!

Jarvis is your all-in-one agent portal, giving you 24/7 access to the tools, resources, and insights you need—right when you need them. Below are some areas in Jarvis you can explore!

Licensing and Certifications

1 In the **Ready to Sell** section on Jarvis, you can explore how to get started.

- ☐ Compare Certification Paths before launching Learning Lab
- ☐ View your Certification Status
- ☐ Learn about the products you are licensed to sell

 [Click here](#) or follow the path in Jarvis: Knowledge Center > Ready to Sell > Certification Overview

2 Ensure your personal and professional credentials are accurate and up-to-date by **managing your profile**.

- ☐ Verify personal contact information (address, phone, email)
- ☐ Confirm certification to sell UnitedHealthcare products
- ☐ Ensure you're properly appointed in all licensed states
- ☐ Set up Direct Deposit for your commissions

 [Click here](#) or follow the path in Jarvis: Homepage > Name (upper right corner) > Manage Account Info

Product Education – Before 10/1

1 The **Medicare Product Portal** will allow you to preview our 2026 Medicare Advantage plans. Keep in mind that 2026 plans are not available on the consumer facing websites until 10/1.

- ☐ Explore plan details by county
- ☐ Learn about consumer-first plan designs
- ☐ Locate your local support team

 [Click here](#) or follow the path in Jarvis: Homepage > Quick Access > Medicare Product Portal

2 **Quick Reference Guides** are short documents that contain high-level details about specific topics. You can use these resources to quickly get information about our products and what members can expect with their benefits.

- ☐ Plan Information
- ☐ Ancillary/Extras
- ☐ Member Experience

 [Click here](#) or follow the path in Jarvis: Knowledge Center > Reference Guides > Product Guides





Product Education – After 10/1

- 1 The **Find a Plan** will allow you to explore Medicare options by zip code.
 - ☐ View portfolio overviews to understand what UnitedHealthcare plans offer
 - ☐ Compare Medicare plan benefits side-by-side
 - ☐ Add providers and prescriptions for a full plan view

 [Click here](#) or follow the path in Jarvis: Homepage > Find a Plan

- 2 The **Drug Cost Estimator** will give you a head start in understanding your members' drug costs throughout the year by allowing you to select the plan and build the drug list.
 - ☐ Review monthly and annual drug costs
 - ☐ Explain deductibles and drug tiers

 [Click here](#) or follow the path in Jarvis: Homepage > Quick Access > Drug Cost Estimator

- 3 The **Directories and Networks** area in Quick Access will allow you to view the provider networks associated with a plan.
 - ☐ Use the **Find a Doctor** to get a full list of network providers
 - ☐ **Find a Pharmacy** will provide a full list of network pharmacies
 - ☐ The **OTC Store Finder** will allow you to search the member's zip code for participating stores
 - ☐ Explore the **Renew Active Fitness Locator** for participating gyms for that benefit
 - ☐ Other directories available: Behavioral Health, Dental, Vision, Hearing and Chiropractic

 [Click here](#) or follow the path in Jarvis: Homepage > Quick Access

- 4 The **Medicare Product Resources** will allow you to quickly access plan information across the UnitedHealthcare portfolio of products.
 - ☐ Explore valuable Medicare Supplement plan resources and information
 - ☐ Stay informed with educational content, updates and videos on the *What's up with Med Supp?* page
 - ☐ Take a deeper dive into Medicare Advantage plan information

 [Click here](#) or follow the path in Jarvis: Knowledge Center > Medicare Product Resources

Additional Education Opportunities

- 1 In **Agent News** stay up-to-date with current UnitedHealthcare communications about agent tool enhancements, training, and trending news.
 - ☐ Explore the most current news
 - ☐ Sort by month and year

 [Click here](#) or follow the path in Jarvis: Knowledge Center > Agent News





Additional Education Opportunities, cont.

- 2 Access **on-demand** and **national and local webinars** to help build confidence and knowledge in products, sales strategies, and member experience.
 - ☐ Launch Learning Lab to explore self-paced learning, videos and job aids
 - ☐ Register for a National Webinar that fits your needs and availability
 - ☐ See what local trainings are being offered in your area

 [Click here](#) or follow the path in Jarvis: Knowledge Center > Agent Training

- 3 In **Member Communications** learn about key member touchpoints during the enrolling and onboarding process and plan year.
 - ☐ The **Medicare Advantage** tab will provide key communications such as the Welcome Letter, Medicare Prescription Payment Plan and Chronic SNP verification communications
 - ☐ Discover **Medicare Supplement** enrollment and onboarding touchpoints to simplify the experience for your members

 [Click here](#) or follow the path in Jarvis: Knowledge Center > Member Communications

Sales Tools

- 1 **Jarvis** has access links to the agent tools you may use daily. These tools are essential to help support your growing book of business.
 - ☐ Check Medicare and Medicaid eligibility with ease using **the Medicare & Medicaid Eligibility Lookup** tool. Features include Extra Help level, Medicaid level with plan options
 - ☐ Launch the **UHC Agent Toolkit** to find a variety of marketing materials like postcards, flyers, social media posts and more
 - ☐ Download or order printed agent and member sales materials from the **Sale Materials Portal** for Medicare Advantage plans, Prescription Drug Plans and Medicare Supplement plans
 - ☐ Review **Meeting Resources** for events, Scope of Appointment and Permission to Contact (PTC) information
 - ☐ Start an application via **JarvisEnroll**
 - ☐ Complete an electronic **Scope of Appointment** (eSOA), if applicable

 [Click here](#) or follow the path in Jarvis: Homepage > Sales Tools tab > Sales Materials

- 2 Manage your existing clients and their information effectively in **the Book of Business**.
 - ☐ Order ID cards
 - ☐ Change a member's PCP (if applicable)
 - ☐ Start an application from the member's profile

 [Click here](#) or follow the path in Jarvis: Homepage > Book of Business





Retain with Confidence!

Having a retention strategy is important for growing your business. Checking in with your members can help to make sure they are satisfied with their coverage and are ready for 2026. Below is a timeline of possible actions you can take advantage of today!

August



- ☐ Connect with your referral sources to educate them on industry changes. Remind them of the service you can provide to Medicare consumers and/or their caregivers.
- ☐ Select and reserve venues and report your in-person and virtual Annual Notice of Change (ANOC) events, if applicable.
- ☐ Prime the market, build your lead pipeline. Be visible with community events, provider visits and senior centers.
- ☐ Set goals to hold yourself accountable and to stay on track for a successful AEP.
- ☐ Finalize locations for ANOC events, if applicable, and create a calendar to stay on task with events you are hosting.

September



- ☐ Encourage members to call you first with questions about plan benefits starting 10/1.
- ☐ *Offer to set up a personal plan review with your members or invite them to an in-person or virtual event you are hosting.
Remember: MA Marketing appointments must not occur until 10/1 or later. Appointments may be scheduled and SOA obtained for appointments occurring on or after 10/1.
- ☐ Call event venues to verify date and time for any events that you are hosting.
- ☐ Remind existing members in an AARP® Medicare Supplement Insurance Plan from UnitedHealthcare® that there is nothing they need to do. Their plan will automatically renew if they keep up with their premium payments. It is a best practice to review needs annually regardless of current coverage.

October-December



- ☐ Create your value proposition and understand the value of UnitedHealthcare. Be sure to practice it several times.
- ☐ Create a portfolio of any job aids and plan resources that you may need out in the field (Enrollment Guides, Benefit Highlight Brochures, Shopping Sheets, etc.).
- ☐ Prepare post AEP "Thank You" cards.
- ☐ Schedule new member events for January to see if members have questions about their plan or how to access benefits.
- ☐ Prepare Birthday Cards to be sent out throughout the year.

***Agents must not meet with consumers to discuss needs for 2026 MA Plans until 10/1.**





Gear up for AEP!

Consumers may expect agents to be knowledgeable, responsive, and compliant. UnitedHealthcare has made that simple for you with some additional resources.

AEP Resource Page

UnitedHealthcare is committed to providing you with the tools and support you need during AEP. Additional information will be added to this page throughout AEP. Check out the resources below to get started.

- ☐ The **AEP Checklist** will provide additional strategies that you can implement this AEP
- ☐ Direct access to view and compare plans
- ☐ Links to the tools and resources you need
- ☐ Learn about the value of UnitedHealthcare

 [Click here](#) or follow the path in Jarvis: Homepage > 2026 AEP Resources

Evaluate the Digital Experience

Digital tools help members access their health plan information as early as enrollment, without needing constant assistance. Whether it's checking benefits, scheduling appointments, or ordering prescriptions, members can do it all with a few taps.

Encourage **pre-effective members** to:

- ☐ Explore digital tools as early as enrollment
 - ☐ For Medicare Advantage members, show how they can track their enrollment status using the Enrollment Tracker
 - ☐ Explore features on the mobile app or member website to get familiar before their plan starts
- ☐ Guide your members to use the Member site/UCard Hub to manage their benefits
- ☐ For Medicare Advantage members, encourage them to take advantage of earning rewards for completing healthy activities

Want to boost your confidence?

Check out the **Member Website and App Demo Experience** course on Learning Lab. This interactive training walks you through the digital member experience—both before and after a plan's effective date.

 [Click here](#) or follow the path in Jarvis: Knowledge Center > Agent Training > Learning Lab > Content Library > Member Website and App Demo





Setting Goals

Setting effective sales goals is essential for staying focused and accountable, especially during AEP. Below are some tips to keep you motivated!

1 Define Your Objective

- ☐ Number of enrollments you hope to accomplish
- ☐ Current member retention rate
- ☐ Analyze past performance

2 Use the SMART Framework

- ☐ Specific: Clearly identifies what is expected, why it is important, and who's involved
- ☐ Measurable: Track enrollments
- ☐ Achievable: Based on past data and capacity
- ☐ Relevant: Tied to your business growth
- ☐ Time-bound: Create a deadline

3 Track and Adjust

- ☐ Plan for obstacles
- ☐ Review your progress weekly
- ☐ Adjust tactics if you are not meeting your goal

Your Support Team

As part of our hassle-free approach, the **Producer Help Desk** supports your entire sales experience, including contracting, certifications, provider/Rx look-ups, and commission inquiries. While your local support team is available, the PHD should be your first call.

888-381-8581 - English / Español (Presione la opción 2)
Monday to Friday: 7am - 9pm CT

Utilize our chat feature to connect with a dedicated Sales Support Representative. We're here to assist you with your plan and answer any questions you may have, ensuring you get the support you need in real-time.

 [Click here](#) or follow the path in Jarvis: Homepage > Agent Support Center (upper right)

Remember, this AEP you are not just helping people choose plans, you're helping them choose peace of mind. Let your passion lead the way. You've got this!

