Book of Business on Jarvis
Support your members

Book of Business is conveniently located in Jarvis and gives you instant access to your member information, helping unlock the full potential of your business. From member data listings to in-depth reports, this tool helps you boost retention, optimize marketing strategies and support you in meeting your sales goals.
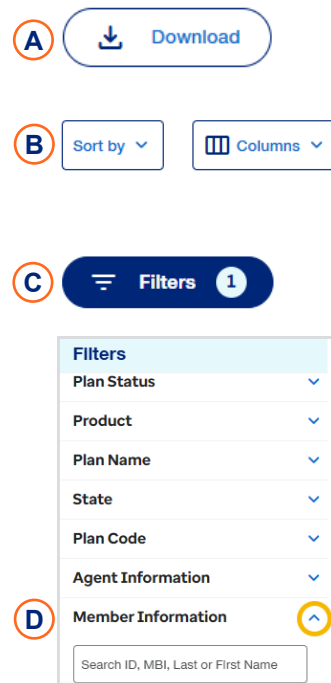
Key Features

These features help you more easily identify members and manage your book of business based on your needs.

✓ **Access** contact information, payment method information, application completion details and premiums (also available for AARP Medicare Supplement Plans)

✓ **Start** a Medicare Advantage or Prescription Drug Plan application and auto-populate the member's profile information – a time-saving feature for plan changes

✓ **Act** on behalf of the member to change the Primary Care Provider, Request a new, printed UCard® for all plans, Submit and track a member escalation and eliminate the time it takes to enter your information and the member's information and more

What's New

A **Download** a detailed report of members by clicking the 'Download' button and selecting additional columns to include in your report

B **Customize** your view by clicking the 'Sort by' button to sort your columns and/or by clicking the 'Columns' button to select column preferences

C Effortlessly **filter** your member list by key identifiers such as Member Information, Product, Plan Name and more

D **Search** for members is now located under Member Information filter (click the down arrow ﹀ to open the search field) and you can now search your entire book for members (not limited to 500)

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Coming soon this AEP

New enhancements built to help you work smarter and faster to better assist your members.

✅ **Filter by member status:**

- o **SSBCI** verification status for D-SNP plans
- o **C-SNP** chronic condition verification status
- o **Service Area Reduction** (SAR) message alerts agents if a member's plan is a SAR for next plan year

✅ New **Member Status column** will show key verification steps such as SSBCI or C-SNP and additional message alerts such as member's plan is a SAR for the next plan year

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How to Access

Jarvis is your one-stop-shop to access key tools like Book of Business. In Jarvis, you'll find "Book of Business" conveniently located in the top menu bar.

jarvis®	United Healthcare			Agent Search	Agent Support Center
Home	Sales Tools ⌄	Applications	Commissions ⌄	**Book of Business**	Knowledge Center ⌄

Additional Resources

Check out these resources on Learning Lab (search in the Content Library):

- Book of Business FAQ
- Book of Business Job Aid
- Book of Business Video
- Jarvis Book of Business Ordering a Member ID Card and Changing the PCP (Job Aid)