



2027 Annual Enrollment Period (AEP) Playbook

Your quick guide for feeling more confident, prepared and ready to support your clients when it matters most this AEP.

[Click here to get started](#)



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Welcome

At UnitedHealthcare, we're committed to supporting you every step of the way as you prepare for AEP. This interactive playbook is designed to help you feel confident, prepared and ready to deliver for your clients when it matters most. Inside, you'll find the tools, insights and strategies to help you succeed.

Take time to explore each section, dive in, apply what works for your business and come back to the playbook throughout AEP to stay on track.



Click on a topic above to navigate to where you would like to start!



Get to know the power of Jarvis

**2027 plans are not available on the consumer facing websites until 10/1.*

Jarvis is your all-in-one agent portal and essential tool for offering Medicare plans. Below are just a few of the features to explore.

Topic	Agent tool and description	Links and paths 
Enrollment and plan selection	The Find a Plan tool, you can explore Medicare options by zip code and start an enrollment*.	Click here or go to the Jarvis Homepage
	Review the Medicare Product Portal to preview our 2027 Medicare Advantage plans* and locate your local support team.	Click here or go to the Jarvis Homepage > Quick Access
Provider and cost tools	Utilize the Directories and Networks section of the Quick Access to view the provider networks and pharmacies associated with a plan.	Click here or go to the Jarvis Homepage > Quick Access
	Check out the Drug Cost Estimator to review monthly and annual drug costs, including deductibles and drug tiers.	Click here or go to the Jarvis Homepage > Quick Access
Knowledge and support	Explore the dedicated D-SNP page where you can understand the most recent eligibility and enrollment criteria.	Click here or go to the Knowledge Center > Medicare Product Resources > D-SNP
	Get to know Ask Jarvis , a powerful tool designed to help you quickly locate the information and resources available on Jarvis.	Click here or go to the Knowledge Center to see the search tool
	Explore the What's up with Med Supp? page to find quick videos and state-specific information about Medicare Supplement Insurance plans	Click here or go to the Knowledge Center > Medicare Product Resources > Medicare Supplement
Training and resources	Access on-demand and national webinars to help you prepare for AEP.	Click here or go to the Knowledge Center > Agent Training
	Download the Sales Tools Guides to help navigate through systems this AEP.	Click here or go to the Knowledge Center > Reference Guides > Sales Tools Guides tab
	Explore the 2027 Agent Quick Reference Guides to quickly get information about our products and what members can expect with their benefits.	Click here or go to the Knowledge Center > Reference Guides > Product Guides tab



Set goals

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

Set activity targets

- ☐ Number of appointments per week
- ☐ Number of follow-ups with existing members
- ☐ Number of community or marketing events
- ☐ Daily/weekly outreach goals (calls, emails, texts)

Plan for retention

- ☐ Identify clients due for plan reviews
- ☐ Prioritize high-risk members (plan changes, cost impacts, provider changes)
- ☐ Schedule proactive outreach before AEP*
- ☐ Set a target percentage for retained vs. new enrollments
- ☐ Get to know the full Medicare Supplement Insurance portfolio to help members with options

Use the SMART Framework for creating goals

- ☐ Specific: Clearly identify 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

Track and Adjust

- ☐ Review progress against goals every week
- ☐ Block time for appointments, outreach, and follow-ups
- ☐ Adjust strategy based on results
- ☐ Stay flexible during peak enrollment weeks



Set clear goals for yourself to stay focused, drive your success and help ensure you're making the greatest impact with every interaction.

*Upcoming year plan benefits cannot be discussed with beneficiaries prior to 10/1



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Explore resources

Clients may expect agents to be knowledgeable and responsive. UnitedHealthcare has made that easier for you with some additional resources.

UHC Agent Toolkit

Launch the UHC Agent Toolkit to find a variety of marketing and communication materials like postcards, flyers, social media posts and more.

[Click here](#) or go to Jarvis > Sales Tools > Sales Materials

Book of Business

Help manage your Book of Business with the ability to check member status, access contact information, payment method information, application completion details, submit and track a member escalations and more.

[Click here](#) go to Jarvis > Book of Business tab

Enrollment Tools

Use **JarvisEnroll**, UnitedHealthcare's electronic enrollment tool. Offers features like remote signature and the Health Assessment.

[Click here](#) go to the Jarvis Homepage > Quick Access panel

Check Medicare and Medicaid eligibility with ease using the **Medicare & Medicaid Eligibility Lookup** tool. Features include Extra Help level, Medicaid level with plan options

[Click here](#) go to the Jarvis Homepage > Search MMV

Meeting Resources

Review Meeting Resources for events, Scope of Appointment and Permission to Contact (PTC) information.

[Click here](#) go to Jarvis > Sales Tools > Meeting Resources

Agent News

Stay up-to-date with current UnitedHealthcare communications about agent tool enhancements, training and trending news.

[Click here](#) go to the Jarvis Homepage

Find a Plan

Simplify the plan selection process. Use this tool to compare plans, confirm provider coverage and estimate prescription drug costs, helping you make more informed recommendations.

[Click here](#) go to the Jarvis Homepage



Retain with confidence

Checking in with your members can help to make sure they are satisfied with their coverage and are ready for 2027. 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:** 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 if they want to remain in their plan.

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 (Plan Highlights, Clarity Guides, 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 Greeting Cards, Birthday Cards and other member outreach materials to be sent out throughout the year.

Checking in with your members can help to make sure they are satisfied with their coverage and are ready for 2027.



*Events can occur starting 10/1



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AEP Planning Checklist

AEP is almost here. Are you ready? Whether you're focusing on your current Book of Business or bringing in new enrollees, UnitedHealthcare has your back every step of the way. Use the checklist below to help prepare for a successful AEP.

Certification and Licensing

- ☐ Compare Certification Paths and view your Certification Status
- ☐ Verify personal contact information
- ☐ Ensure you're properly appointed in all licensed states
- ☐ Set up Direct Deposit for your commissions

Product Knowledge

- ☐ Attend a product overview meeting to learn about the UnitedHealthcare 2027 portfolio
- ☐ Review enrollment materials, drug formularies, and the AEP Resources page on Jarvis
- ☐ Use the Medicare Product Portal to compare Medicare Advantage (MA) plans

Marketing and Events

- ☐ Develop a marketing plan with target areas, demographics, and lead strategies
- ☐ Ensure you have all appropriate materials: business cards, brochures, flyers, etc.
- ☐ Connect with providers and pharmacies to share 2027 updates*
- ☐ Create a calendar and confirm dates/times for hosted events
- ☐ Prepare and practice your sales presentations, including a strong, directive close

Technology and Tools

- ☐ Pre-order Product highlights for MA plans and order Enrollment Kits for Medicare Supplement Insurance plans (always available) via the Sales Materials Portal
- ☐ Download the Jarvis app and learn to use tools on Jarvis (e.g., JarvisEnroll, Find a Doctor, Drug Cost Estimator)

Training and Support

- ☐ Attend local and national webinars via Jarvis, including AEP Retention Planning
- ☐ Contact PHD for any additional help, e.g. navigating Jarvis, ordering materials, etc.
- ☐ Reach out to local leadership for assistance with AEP planning

Follow-Up and Retention

- ☐ Review and manage pending applications in Jarvis regularly
- ☐ Send post-AEP thank-you cards and prepare birthday cards for the year
- ☐ Schedule January new member meetings and block time for outreach and follow-ups

Medicare Advantage Prep*

- ☐ Schedule in-person or virtual Annual Notice of Change (ANOC) meetings for existing clients and file them as Sales/Marketing Events to allow plan changes or new enrollments
- ☐ Organize meetings by type: ANOC, Service Area Reduction (SAR) impacts, and new market plans, follow up with leads from your pipeline
- ☐ Emphasize the value of a strong relationship with their PCP for coordinated care
- ☐ Use the Medicare Product Portal to compare UnitedHealthcare Medicare Advantage plans in your market

AARP® Medicare Supplement Insurance Plans from UnitedHealthcare® Prep

- ☐ Watch the Medicare Supplement 101 video and review job aids in Learning Lab to understand plan benefits and why AARP Medicare Supplement Insurance plans may be a good fit for clients
- ☐ Remind members their plan renews automatically if premiums are paid
- ☐ Encourage members to create an account at myAARPMedicare.com
- ☐ Search "MS Member" on the UHC Agent Toolkit for member-facing materials
- ☐ On the Sales Materials Portal, download the state-specific Producer Handbook for plan details, ratings, and discounts. Order Leave Behind materials to help clients understand plan benefits

*2027 MA plan benefits cannot be discussed until 10/1



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**Thank you for your continued
support in helping us deliver
trusted Medicare coverage to the
members we serve.**



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