

Jarvis PHD Escalated Service Request Dashboard



The **PHD Escalated Service Request Dashboard** is located on Jarvis within the Agent Support Center. This dashboard allows you to independently monitor pending escalated issues reported through the Producer Help Desk, reducing the need for calls regarding basic status updates on service requests.

How to access the PHD Escalated Service Request (SR) Dashboard

This dashboard is found at the bottom of the **Agent Support Center** on Jarvis. From the dashboard you will be able to:

✓ The **Sort and Filter** options will let you find what matters with less scrolling, fewer clicks and faster answers for your members.

✓ Being able to **sort by Pending SRs** will help you identify open or unresolved issues. No guessing, you can confidently know where things stand.

✓ Filters like the **Line of Business** (IFP or M&R) and **Category** will help you quickly align the request to the situation.

✓ You can **enter the SR number** to pull up the request. This makes it easier to get directly to the request.

✓ The **Date Submitted** and **Notes** columns will allow you to clearly explain when the request was submitted, what's been done so far and what's still pending.

The screenshot shows the Agent Support Center interface. At the top is a 'Chat with PHD' section. Below that is a 'Need Help?' section with a 'Chat now' button. The 'Key Tools to Enhance Your Experience' section includes links for 'Book of Business', 'Applications', 'PHD Inquiry Form Excel', 'Manage Profile', 'Commissions', 'ASL Interpreter Request Form', and 'TPMD Subcontracted Relationships Disclosure Form'. The 'Member Services' section provides information on how to contact Member Services. The 'Escalated Member Issues' section contains a link to the 'Member Escalation Request Form' and a 'PHD Escalated Service Request Dashboard' link, which is highlighted by a yellow arrow. The dashboard itself shows a table of pending and resolved service requests with columns for SR ID, SR Status, Date Submitted, Category, Issue Reason, and Notes.

SR ID	SR Status	Date Submitted	Category	Issue Reason	Notes
SR-00000001	Pending	06/01/2025	Application	Status	In Progress: We are actively working on your escalation. Next Step: No action needed unless we contact you for more information.
SR-00000002	Pending	07/05/2025	Contracting	Appointments Issue	Escalated: We escalated your issue. Next Step: No agent action needed.
SR-00000003	Pending	06/01/2025	Contracting	Appointments Issue	In Progress: We are actively working on your escalation. Next Step: No action needed unless we contact you for more information.
SR-00000004	Pending	07/05/2025	ARPP Med Supp	AOR Appeal Received	In Progress: We are actively working on your escalation. Next Step: No action needed unless we contact you for more information.
SR-00000005	Pending	06/01/2025	Contracting	Appointments Issue	Escalated: We escalated your issue. Next Step: No agent action needed.
SR-00000006	Pending	07/05/2025	ARPP Med Supp	AOR Appeal Received	Escalated: We escalated your issue. Next Step: No agent action needed.
SR-00000007	Resolved	06/01/2025	ARPP Med Supp	AOR Appeal Received	Escalated: We escalated your issue. Next Step: No agent action needed.
SR-00000008	Resolved	07/05/2025	Contracting	Payment Inquiry	Completed: The escalation has been completed. Next Step: Please reference the email from 06/01/2025 for details. Please call PHD if you have any further questions.





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Single contract agent (contracted for M&R or IFP) experience

The dashboard can help provide a clear, organized view of all the requests you've escalated to PHD. You can easily track the status of each request and review the most recent updates in one place.

Key features include:

- Track request status (such as Pending or Resolved) so you know where things stand
- Filter and sort options to quickly find the requests you need
- Detailed request information, including submission date, category, issue reason and notes with status updates and next steps

Member Details View:

- When your request involves a member, you can view important member information directly within the dashboard
- If multiple members are tied to one escalation, you can easily toggle to see details for each member in the Member Details view
- You may see blank information in the Member Details section for some requests. In some cases, member details are not available or not required for the request.

★ **Helpful Tip:** Use the filters and sorting options to narrow down results and quickly locate specific requests or updates.

The screenshot displays the PHD Escalated Service Request Dashboard. On the left, a 'Filters' sidebar allows filtering by SR Status (Pending, Resolved), Category, SR ID, and Date Submitted. A 'Filter' button is highlighted. The main area shows a table of requests with columns: SR ID, SR Status, Date Submitted, Category, Issue Reason, and Notes. A 'Sort by' dropdown is highlighted in the top right. Below the table, a 'Member Details' pop-up is shown for SR-02855128, displaying member information like First Name, Last Name, Date of Birth, Plan Type, and Effective Dates. Arrows indicate the flow from the filter and sort controls to the table, and from a table row to the member details view.

SR ID	SR Status	Date Submitted	Category	Issue Reason	Notes
SR-02855128 Member Details	Pending	08/04/2025	Application	Status	In Process: We are actively working on your escalation. Next Step: No action needed unless we contact you for more information.
SR-22441877	Pending	07/21/2025	Contracting	Appointments Issue	Escalated: We escalated your issue. Next Step: No agent action needed.
SR-89441424	Pending	06/01/2025	Contracting	Appointments Issue	In Process: We are actively working on your escalation. Next Step: No action needed unless we contact you for more information.
SR-32930411 Member Details	Pending	05/29/2025	AARP Med Supp	AOR Appeal Received	In Process: We are actively working on your escalation. Next Step: No action needed unless we contact you for more information.
SR-89441424	Pending	06/01/2025	Contracting	Appointments Issue	Escalated: We escalated your issue. Next Step: No agent action needed.
SR-32930411 Member Details	Pending	05/29/2025	AARP Med Supp	AOR Appeal Received	Escalated: We escalated your issue. Next Step: No agent action needed.
SR-02855128 Member Details	Resolved	06/15/2025	AARP Med Supp	AOR Appeal Received	Escalated: We escalated your issue. Next Step: No agent action needed.
SR-02635128	Resolved	07/27/2025	Contracting	Payment Inquiry	Completed: The escalation has been completed. Next Step: Please reference the email from noreply@uhc.com for details. Please call PHD if you have any further questions.

Member Details

First Name: Susan
Last Name: Smith
Date of Birth: 04-13-1980
Plan Type: HMOPOS
Effective Dates: 05-12-2025

NOTE: Service Requests escalated prior to 06/16/2026 may not display information in the Notes columns because this data was not available when those requests were created.





Dual contract agent (contracted for M&R or IFP) experience

If you have multiple active Writing IDs, the **Line of Business** column will show to help identify your escalation. The **Member Details** will show multiple members if they were added to the escalation.

The screenshot shows the PHD Escalated Service Request Dashboard. On the left, a 'Members Details' sidebar lists three members: Susan Smith, Lara Josef, and Matthew James. An arrow points from the 'Member Details' link in the first row of the table to the sidebar. The main table has columns: SR ID, SR Status, Date Submitted, Line of Business, Category, Issue Reason, and Notes. The first row is highlighted, showing SR-39105843, Pending status, 08/20/2025, M&R Line of Business, Commissions Category, and Appeal Issue Reason.

SR ID	SR Status	Date Submitted	Line of Business	Category	Issue Reason	Notes
SR-39105843 Member Details	Pending	08/20/2025	M&R	Commissions	Appeal	In Process: We are actively working on your escalation. Next Step: No action needed unless we contact you for more information.
SR-02855128 Member Details	Pending	08/04/2025	M&R	Application	Status	Escalated: We escalated your issue. Next Step: No agent action needed.
SR-22441877	Pending	07/21/2025	IFP	Contracting	Appointments Issue	In Process: We are actively working on your escalation. Next Step: No action needed unless we contact you for more information.
SR-89441424	Pending	06/01/2025	M&R	Contracting	Appointments Issue	In Process: We are actively working on your escalation. Next Step: No action needed unless we contact you for more information.
SR-32930411 Member Details	Pending	05/29/2025	M&R	AARP Med Supp	AOR Appeal Received	Escalated: We escalated your issue. Next Step: No agent action needed.
SR-89441424	Pending	06/01/2025	IFP	Contracting	Appointments Issue	Escalated: We escalated your issue. Next Step: No agent action needed.
SR-32930411 Member Details	Pending	05/29/2025	M&R	AARP Med Supp	AOR Appeal Received	Escalated: We escalated your issue. Next Step: No agent action needed.
SR-02855128 Member Details	Resolved	06/15/2025	M&R	AARP Med Supp	AOR Appeal Received	Completed: The escalation has been completed. Next Step: Please reference the email from noreply@uhc.com for details. Please call PHD if you have any further questions.
SR-02855128	Resolved	07/27/2025	IFP	Contracting	Payment Inquiry	Completed: The escalation has been completed. Next Step: Please reference the email from noreply@uhc.com for details. Please call PHD if you have any further questions.

Agency experience

You will see included columns for **Agent Name**, **Agent WID** and **Line of Business** to help assist in tracking escalated service requests for downline agents, providing a straightforward way to distinguish between different downline agents.

The screenshot shows the PHD Escalated Service Request Dashboard. The table has columns: SR ID, SR Status, Agent Name, Agent WID, Date Submitted, Line of Business, Category, Issue Reason, and Notes. The first row is highlighted, showing SR-39105843, Pending status, Bike Baker as the Agent Name, 123456789 as the Agent WID, 08/20/2025 as the Date Submitted, M&R Line of Business, Commissions Category, and Appeal Issue Reason.

SR ID	SR Status	Agent Name	Agent WID	Date Submitted	Line of Business	Category	Issue Reason	Notes
SR-39105843 Member Details	Pending	Bike Baker	123456789	08/20/2025	M&R	Commissions	Appeal	Commissions successfully processed on 08/08/2025.
SR-02855128 Member Details	Pending							Updated application

NOTE: Service Requests escalated prior to 06/16/2026 may not display information in the Line of Business and Notes columns because this data was not available when those requests were created.



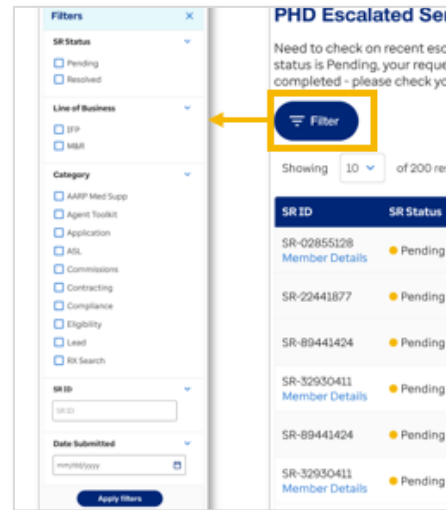


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Filters

Apply selected filters to your search to narrow down the results. **Check the box** of the desired filter(s) and click **Apply Filters**.

- **SR Status:** Pending or Resolved
- **Line of Business:** IFP or M&R. Both will show if you are contracted with each one.
- **Category:** Many different categories to help narrow down your search)
- **SR ID:** Allows you to enter in the SR number.
NOTE: You must include the “SR-” when entering the number
- **Date Submitted:** Enter in the date by using the calendar icon or typing in in the fields



Columns

Below are the definitions of each column:

- **SR ID:** The request identifier (the member details link is found here)
- **SR Status:** The status of the request
- **Date Submitted:** The date the request was submitted
- **Category:** Description of the request topic, e.g. Commissions, Application, Contracting
- **Issue Reason:** Additional details of request/category
- **Notes:** Updates/notes regarding the work being done on the request

SR ID	SR Status	Date Submitted	Category	Issue Reason	Notes
SR-02855128 Member Details	Pending	08/04/2025	Application	Status	In Process: We are actively working on your escalation. Next Step: No action needed unless we contact you for more information.

UnitedHealthcare has your back with resources to help support you!



As part of our hassle-free approach, the **Producer Help Desk** supports your entire sales experience, including contracting, certifications, provider and Rx look-ups, and commission inquiries.



CLICK HERE or go to *Jarvis > Agent Support Center*

