

2014 Certification User Guide

EDC Agents (External Distribution Channel)



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Technical Requirements

In order to take any of the certification modules, your computer* needs the following requirements:

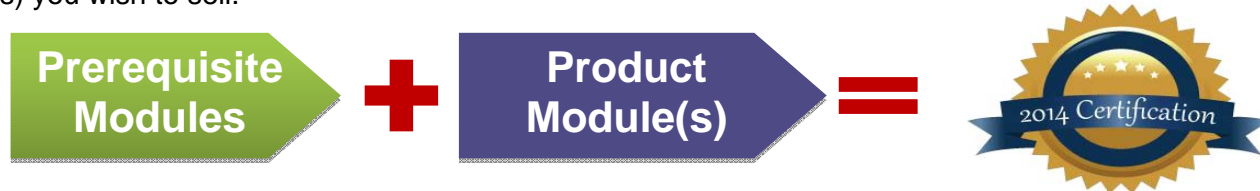
- Internet Explorer version 7.x or 8.x
- Screen resolution of 1024 x 768
- Acrobat reader version 6 or higher
- Macromedia Flash Player 9 or higher

If you have trouble launching a module, contact the Producer Help Desk (PHD):
888-381-8581
Monday-Friday, 7 a.m. – 7 p.m. CST

** Modules are not compatible with mobile technology such as smart phones or tablets.*

2014 Annual Certification Requirements

In order to solicit, present or sell any products in the UnitedHealthcare Medicare Solutions portfolio¹, you must be certified, appointed (if required) and licensed in each state where you want to sell. To become certified for the plan year, you must complete all the required prerequisite modules and the individual product module(s) for the product(s) you wish to sell.



A summary of the steps to certify is as follows:

1. All agents must complete, in order, the following **prerequisite modules** and pass the corresponding assessment with a score of 85% or higher within three attempts:
 - Medicare Basics
 - Ethics and Compliance
 - AARP 101
2. All agents must complete the **product module(s)** and pass the corresponding assessment(s) with a score of 85% or higher within three attempts. Available product modules by type are:
 - Medicare Advantage Plans (HMO, POS, PPO)
 - Private Fee-for-Service Plans (PFFS)
 - AARP Medicare Supplement Plans
 - SecureHorizons Medicare Supplement Plans²
 - Medicare Prescription Drug Plans
 - Chronic Illness Special Needs Plans (CSNP)
 - Dual Special Needs Plans (DSNP)
 - Institutional Special Needs Plans (ISNP)³
 - Senior Care Options³

Note: If you do not score the minimum 85% in three attempts on a prerequisite module, you are not allowed to sell any UnitedHealthcare Medicare Solutions products for the applicable plan year.

¹ May include branded UnitedHealthcare, Care Improvement Plus, Sierra, Physicians Health Choice, Medica HealthCare Plans, or Preferred Care Partners

² Available only to Internal Sales Representatives (ISR) and Telesales Agents

³ Available by invitation only

AHIP Certification for our EDC Partners

American Health Insurance Plan (AHIP) Certification satisfies the requirement for the following UnitedHealthcare Medicare Solutions Certification Modules: Medicare Basics, Medicare Advantage Plans and Medicare Prescription Drug Plans.

If you choose to certify via AHIP, you need to complete the 2014 AHIP Certification before any other 2014 Certification modules. Failure to do so will result in AHIP score rejection.

See page 5 for instructions.

Step 1: Complete all 3 Prerequisite Modules

Medicare Basics

Ethics &
Compliance

AARP 101

An EDC Agent must choose whether to pursue America's Health Insurance Plans (AHIP) Certification **before starting the 2014 Medicare Basics Test**. If an EDC Agent completes AHIP certification, they will get credit for Medicare Basics, Medicare Advantage Plans and Medicare Prescription Drug Plans (indicated by the dashed border) upon completion of the other two prerequisites modules.

Step 2: Complete Product Module(s)

I want to sell:

Medicare Advantage Plans

UnitedHealthcare, AARP, Care Improvement Plus, Medica HealthCare Plans, Physicians Health Choice, Preferred Care Partners and Sierra branded HMO, POS and PPO Plans

AARP Medicare Supplement Plans

Chronic Illness Special Needs Plans

UnitedHealthcare and Care Improvement Plus

Dual Special Needs Plans

UnitedHealthcare and Care Improvement Plus

Institutional Special Needs Plans

UnitedHealthcare

AARP PDP

Medicare Direct

UnitedHealthcare PFFS brand only

SecureHorizons Medicare Supplement Plans

Senior Care Options

UnitedHealthcare

I must complete this module:

Medicare Advantage Plans

AARP Medicare Supplement Plans

Chronic Illness Special Needs Plans

Dual Special Needs Plans

Institutional Special Needs Plans
(invitation only)

Medicare Prescription Drug Plans

Private Fee-for-Service (PFFS) Plans

SecureHorizons Medicare Supplement Plans

Senior Care Options (invitation only)

AHIP Certification Instructions

American Health Insurance Plan (AHIP) Certification satisfies the requirement for the following UnitedHealthcare Medicare Solutions Certification Modules: Medicare Basics, Medicare Advantage Plans and Medicare Prescription Drug Plans. If you choose the AHIP option, you will also be required to complete the following pre-requisites: Pledge of Compliance, Ethics and Compliance and AARP 101. UnitedHealthcare will accept your AHIP certification and display any other required modules. As with other requirements, you have three total attempts to pass the assessments at 90%. **If you choose to certify via AHIP, you need to complete the 2014 AHIP Certification before any other 2014 Certification modules. Failure to do so will result in AHIP score rejection.**

To begin 2014 UnitedHealthcare Medicare & Retirement certification using AHIP, complete the following steps:

1. Log into www.UnitedHealthProducers.com
2. Click Learning Center
3. Click "2014 AHIP (EDC Only)"
4. Click "Launch course"
5. Sign on with your AHIP ID and password **OR** register if you are a new AHIP user
6. Complete the assigned modules
 - Returning AHIP users will be assigned the recertification modules (2 modules)
 - New AHIP users will be assigned the full certification modules (5 modules)
7. Pass the test in 3 or fewer attempts with a score of 90% or higher
8. At the end of the test, go to the home page - Click "Transmit"

Next, you **must** complete the following modules and pass the tests that are associated with them:

- 2014 Ethics and Compliance
- 2014 AARP® 101

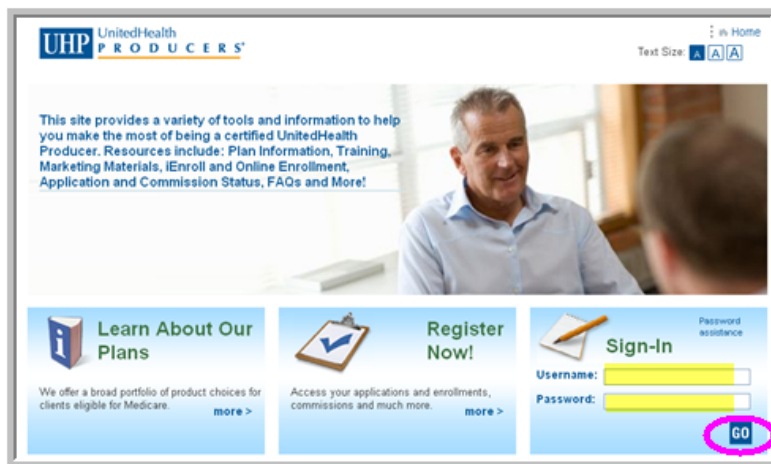
Remember: AHIP Certification is voluntary. If you elect to do this, you will receive a \$50 discount off of the AHIP certification fee if you first enter the AHIP site by going through the www.unitedhealthproducers.com Learning Center. Also, after you begin 2014 Medicare Basics Test you will not be allowed to select AHIP for certification.

Logging In

Registered Users

- Go to www.UnitedHealthProducers.com
- Enter your **username (agent ID)** and **password**
- Click on **GO**

For log in or other assistance with the Distribution Portal, contact the Producer Help Desk (PHD) at 888-381-8581. (Monday—Friday, 7a.m to 7p.m. CST)



Accessing Modules and Certificates

Once you are logged into the Distribution Portal, click on the **Learning Center** button to access your modules and certificates.

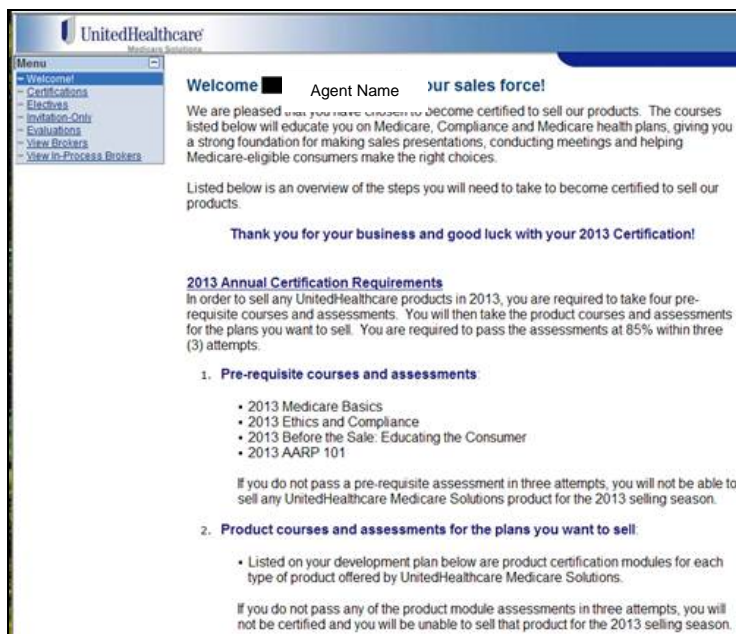


Medicare Solutions Learning Center

Welcome Page

The opening page of the Learning Center is the **Welcome Screen**. This page provides details about the annual certification requirements and modules.

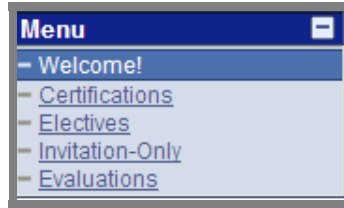
This page also provides links to other sections of the Medicare Solutions programs. Each section is described below.



Navigation Panel

The Welcome Page provides several navigation choices. Located on the left side of the screen, you can select:

- Certifications
- Electives Modules
- Invitations-Only Modules
- Evaluations



Certification Modules

In the Navigation Panel, click on Certifications to view your modules and certifications by year.

- Each module has two required items listed: module and test. Review the module and then take the test.
- **Prerequisite** modules must be taken first and in order.
- Product **Certification** modules should be completed after the prerequisite modules.
- The module status and completion date are provided on this screen.
- Once you are certified to sell a product, you will see a **gold medallion** next to the completion date column.

Year	Module	Status	Date Completed
2013 Prerequisites	2013 Medicare Basics	✓	07/01/2012
	2013 Medicare Basics Test	✓	07/01/2012
	2013 Ethics and Compliance	✓	07/01/2012
	2013 Ethics and Compliance Test	✓	07/01/2012
	2013 Before the Sale	✓	07/01/2012
	2013 AARP 101	✓	07/01/2012
2013 AHIP	2013 AHIP (FMO Only)	—	—
2013 AARP Medicare Advantage Certification	2013 Medicare Advantage Plans (HMO, PPO, POS, excluding PFFS)	✓	07/01/2012
	2013 Medicare Advantage Plans (HMO, PPO, POS, excluding PFFS) Test	✓	07/01/2012

Elective Modules

There are additional modules available for your further education. These are not required but are recommended to further your education. While not required they are highly recommended. They are listed in the **Elective Modules** section.

Year	Module	Status	Date Completed
2013	2013 Connector Model Foundation	—	—
	2013 Employer Group Retiree OE Meeting Process	—	—
	2013 Group Retiree Overview	—	—

Invitation Only Modules

On occasion, you may be required to take a module that is not available to everyone. If you are assigned a specific module, it will be listed in the **Invitation Only** section and must be completed.

Year	Module	Status	Date Completed
2013	Sales Compliance Remediation - Plan and Product Knowledge Issues	—	—
	Sales Compliance Remediation - Plan and Product Knowledge Issues Test	—	—
	Sales Compliance Remediation - Point of Sale Issues	—	—
	Sales Compliance Remediation - Point of Sale Issues Test	—	—

Evaluations

After you complete a module, an evaluation will appear in the **Evaluation** section. Please take a few minutes to complete these evaluations so that we may learn and improve from your comments.


Course Evaluations		
	Status	Date Completed
2013 AARP 101	-	
2013 Before the Sale	-	


Certificates

Upon successful completion of a module and test, a gold medallion will appear on your development plan indicating you are certified to sell the particular product. Open the certificate as needed by clicking on the medallion. Each certificate includes the module name, agent name and party ID, and date of certification. To **print** a copy of the module certificate, follow the instructions below.



Printing

To **print** a copy of your certificate, click on the  icon.

2013 AARP Medicare Advantage Certification			
	Status	Date Completed	
2013 Medicare Advantage Plans (HMO, PPO, POS, excluding PFFS)	✓	07/01/2012	
2013 Medicare Advantage Plans (HMO, PPO, POS, excluding PFFS) Test	✓	07/01/2012	06/05/2013

Note: Screen shots are for illustrative purposes only and are subject to change without notice.