2015 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.

2015 Annual Certification Requirements

To solicit, present or sell any products in the UnitedHealthcare Medicare Solutions portfolio1, you must be licensed and appointed (if applicable) in the state in which the consumer resides and certified in the product(s) you are presenting to and/or enrolling the consumer. 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. You 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. You must complete the **product module(s)** and pass the corresponding assessment(s) with a score of 85% or higher within three attempts, or you are not allowed to sell the applicable product for the applicable plan year. 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 Plans[2]
   - Medicare Prescription Drug Plans
   - Chronic Condition Special Needs Plans (CSNP)
   - Dual Special Needs Plans (DSNP)
   - Institutional Special Needs Plans (ISNP)[3]
   - Institutional-Equivalent Special Needs Plans (IESNP)[3]
   - Senior Care Options[3]

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, AARP, Care Improvement Plus, Medica HealthCare Plans, Preferred Care Partners, SecureHorizons, or Sierra.*
[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 transmit the 2015 AHIP Certification before any other 2015 modules have been started. 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 <u>before</u> starting the 2015 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: **I must complete this module:**

I want to sell:	I must complete this module:
Medicare Advantage Plans UnitedHealthcare, AARP, Care Improvement Plus, Medica HealthCare Plans, Preferred Care Partners, and Sierra branded HMO, POS and PPO Plans	Medicare Advantage Plans
AARP Medicare Supplement Plans	AARP Medicare Supplement Plans
Chronic Condition Special Needs Plans UnitedHealthcare, Care Improvement Plus and Preferred Care Partners	Chronic Condition Special Needs Plans
Dual Special Needs Plans UnitedHealthcare, Care Improvement Plus, Medica HealthCare Plans and Preferred Care Partners	Dual Special Needs Plans
AARP PDP	Medicare Prescription Drug Plans
MedicareDirect UnitedHealthcare PFFS brand only	Private Fee-for-Service (PFFS) Plans
SecureHorizons Medicare Supplement Plans	SecureHorizons Medicare Supplement Plans (ISR and Telesales agents only)
Institutional Special Needs Plans UnitedHealthcare	Institutional Special Needs Plans (invitation only)
Institutional-Equivalent Special Needs Plans UnitedHealthcare	Institutional-Equivalent Special Needs Plans (invitation only)
Senior Care Options UnitedHealthcare	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 attempts to pass the assessments at 90%. **If you choose to certify via AHIP, you need to transmit the 2015 AHIP Certification <u>before</u> any other 2015 modules. Failure to do so will result in AHIP score rejection.**

To begin 2015 UnitedHealthcare Medicare & Retirement certification using AHIP, complete the following steps:

1. Log into www.UnitedHealthProducers.com
2. Click Learning Center
3. Click "2015 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
    - New AHIP users will be assigned the full certification 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:
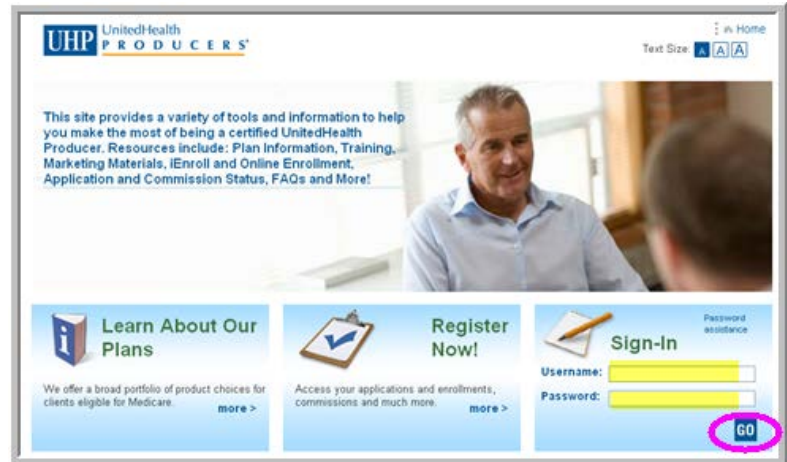
- 2015 Ethics and Compliance
- 2015 AARP® 101

<u>Remember</u>: AHIP Certification is voluntary. If you elect to do this, you will receive a $50 discount off the AHIP certification fee if you <u>first</u> enter the AHIP site by going through the www.unitedhealthproducers.com Learning Center. Also, after you begin 2015 Medicare Basics Test you will <u>not</u> 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
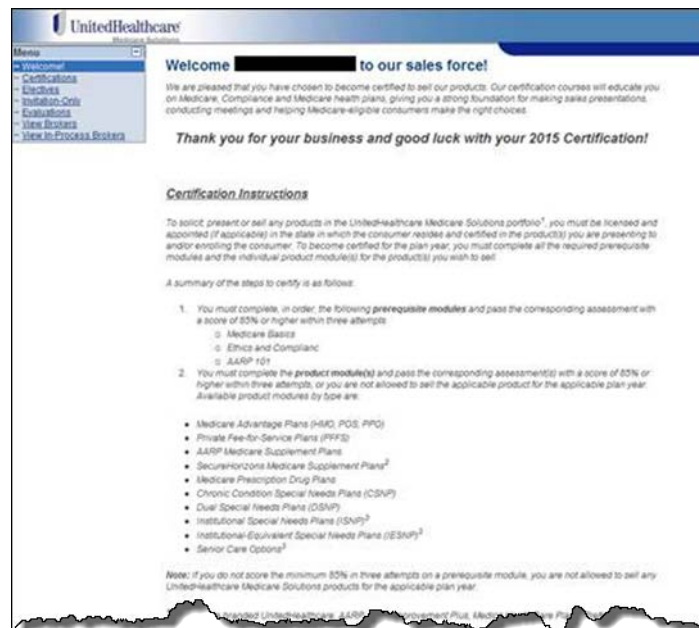to access your modules and certificates.

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
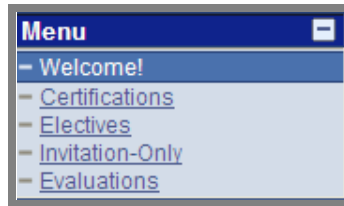requirements and modules.

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.

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.

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.

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
2014 AARP 101	—	
2014 AARP Medicare Supplement Plans	—	

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.

Congratulations!

has completed the requirements to be certified to sell
2014 AARP Medicare Advantage Certification
for the 2014 selling season

Party ID
Date of Certification 10/17/2013
Confirmation # 80655277

UnitedHealthcare
Healing health care. Together.

Certified

Printing

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

2013 AARP Medicare Advantage Certification

	Status	Date Completed	
2013 Medicare Advantage Plans (HMO, PPO, POS, excluding PFFS)	✔	07/01/2012	Print
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.