2016 Certification User Guide

EDC Agents
(External Distribution Channel)

Table of Contents

2016 Annual Certification Requirements

To solicit, present or sell any products in the UnitedHealthcare Medicare Solutions portfolio*, 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 prerequisite modules and the individual product module(s) for the product(s) you wish to sell.

NOTE: While you may proceed directly to each test without completing the related module (except for AARP Course), it is strongly recommended that you review the module before attempting the test.

A summary of the steps to certify is as follows:

1	You must complete all prerequisite tests by passing with a score of 85% or higher within 3 attempts. If you fail any prerequisite test, you will not be able to proceed to any product module or test and will not be able to market or sell any UnitedHealthcare Medicare Solutions product for the applicable plan year.

The following prerequisite tests must be taken in order:
- Medicare Basics
- Ethics and Compliance
- AARP Course

2	You must complete the product test(s) by passing 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, PFFS)
- AARP® Medicare Supplement Plans
- Medicare Prescription Drug Plans
- Chronic Condition and Dual Special Needs Plans (CSNP/DSNP)
- Institutional and Institutional-Equivalent Special Needs Plans (ISNP/IESNP)**
- Senior Care Options**

**Available by invitation only

* May include branded UnitedHealthcare, AARP, Care Improvement Plus, Medica HealthCare Plans, Preferred Care Partners, or Sierra.

AHIP Certification for our EDC Partners
America's 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 2016 AHIP Certification before any other 2016 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 Tests and/or Modules

Medicare Basics	Ethics & Compliance	❖ AARP Course

An EDC Agent must choose whether to pursue America's Health Insurance Plans (AHIP) Certification <u>before</u> starting the 2016 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 tests.

❖ **AARP--returning producers** now have additional choices. Complete just one of the following to meet the AARP portion of the certification requirement:
- o AARP Refresher (Traditional course for returning producers)
- o AARP Membership Benefits
- o AARP Good Works
- o AARP Communicating with Today's 50+ Consumer

Step 2: Complete Product Test(s) and/or 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, PPO and PFFS Plans	Medicare Advantage Plans
AARP Medicare Supplement Plans	AARP Medicare Supplement Plans
Chronic Condition and Dual Special Needs Plans UnitedHealthcare, Care Improvement Plus, Medica HealthCare Plans and Preferred Care Partners	Chronic Condition and Dual Special Needs Plans
AARP PDP	Medicare Prescription Drug Plans
Institutional and Institutional-Equivalent Special Needs Plans UnitedHealthcare	Institutional and Institutional-Equivalent Special Needs Plans (invitation only)
Senior Care Options UnitedHealthcare	Senior Care Options (invitation only)

AHIP Certification Instructions

America's 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: Ethics and Compliance and AARP Course. UnitedHealthcare will accept your AHIP certification and display any other required modules. For AHIP courses, **you have three attempts to pass the assessments at 90%.**

If you choose to certify via AHIP, you need to transmit the 2016 AHIP Certification <u>before</u> any other 2016 modules. Failure to do so will result in AHIP score rejection.

To begin 2016 UnitedHealthcare Medicare & Retirement certification using AHIP, complete the following steps:

1. Log into www.UnitedHealthProducers.com
2. Click Learning Center
3. Click "2016 AHIP (EDC Only)"
4. Select OK to the following two pop-up messages
5. Click "Launch"
6. Sign on with your AHIP ID username and password **OR** register if you are a new AHIP user
7. Complete the assigned modules
    - Returning AHIP users will be assigned the recertification modules
    - New AHIP users will be assigned the full certification modules
8. Pass the test in 3 or fewer attempts with a score of 90% or higher
9. At the end of the test, go to the home page - Click "Transmit to United Healthcare"

Next, you *must* pass the following tests:

- 2016 Ethics and Compliance
- 2016 AARP® Course

<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 2016 Medicare Basics Test you will <u>not</u> be allowed to select AHIP for certification.

NOTE: For agents who choose to complete 2016 AHIP, either directly from the AHIP website or through another carrier, you are still required to follow the above directions in order to transmit your results to UnitedHealthcare and receive credit for the equivalents on your development plan. Again, this must be completed before accessing any other 2016 modules.

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)
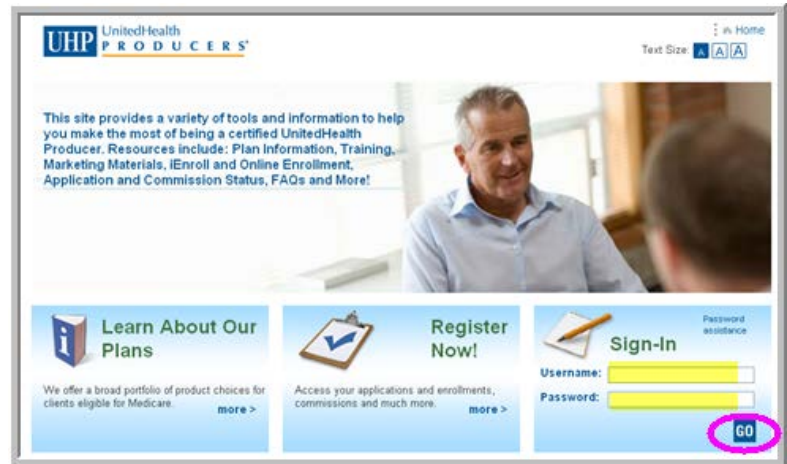
Accessing Modules and Certificates

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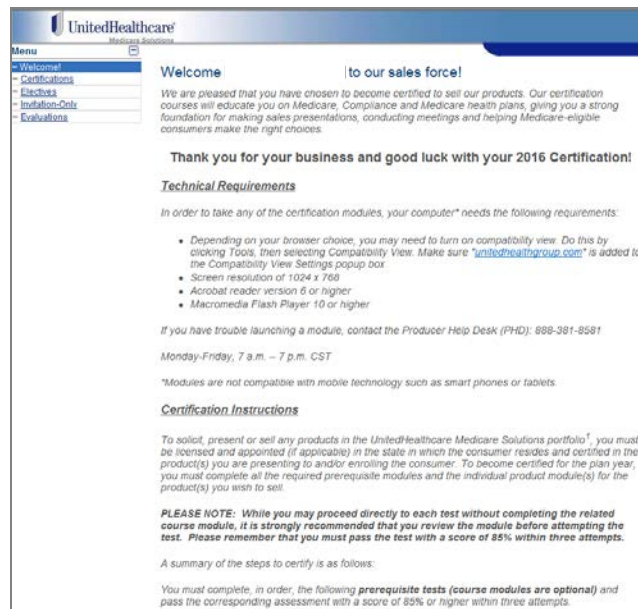
Medicare Solutions Learning Center

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 topic has two items listed: module and test. Review the module (optional) and then take the test (required).
- **Prerequisite** modules/tests must be taken first and in order.
- Product **Certification** modules/tests 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.

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
2016 AARP Medicare Supplement Plans Certification
for the 2016 selling season

Party ID
Date of Certification
Confirmation #

UnitedHealthcare
Keeping health care. Together.

Certified

Printing

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

2015 UHC SNP Chronic Condition Certification

	Status	Date Completed	
2015 Chronic Condition Special Needs Plans (CSNP)	✔	03/20/2015	*Print*
2015 Chronic Condition Special Needs Plans (CSNP) Test	✔	03/20/2015	03/20/2015

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

Technical Requirements

Browser Requirements

In order to take any of the certification modules, **you need to use one of the following browsers:**

- Windows 8 with IE10, and IE11
- Mac Computers with Safari Browser
- Safari Browser on Windows 7
- Google Chrome on Windows 7
- Chromebook
- Firefox 31 on Windows 7
- Screen resolution of 1024 x 768
- Acrobat reader version 6 or higher
- Macromedia Flash Player 9 or higher

In addition, please note the following computer set up requirements:

- 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.

Additional steps may be required for the browser to function correctly with the certification courses; follow the steps in the Browser Compatibility section below.

Browser Compatibility

General Troubleshooting Tips

1. Clear all temporary internet files and cookies (specific instructions for various browsers included in this guide)

2. Close down all browser windows except for the one where you've launched the Learning Center

3. If you experience a blank pages or if there is no response when clicking on a tab within the Learning Center, you need to turn off your pop up blockers—(Specific instructions for various included in this guide)

Clearing Cache/Browsing History/Cookies in Internet Explorer

Please note that steps may vary slightly in different versions of Internet Explorer; however, the steps within each version are very similar

Clear your temporary internet files and cookies:
- **Close** down all browser windows.
- Go to your desktop
  - Right click on the **Internet Explorer icon**
  - Click on **properties**
  - You will see this screen
- Make sure you are on the **general tab.**
- In the middle of the page, click on **delete** to delete files
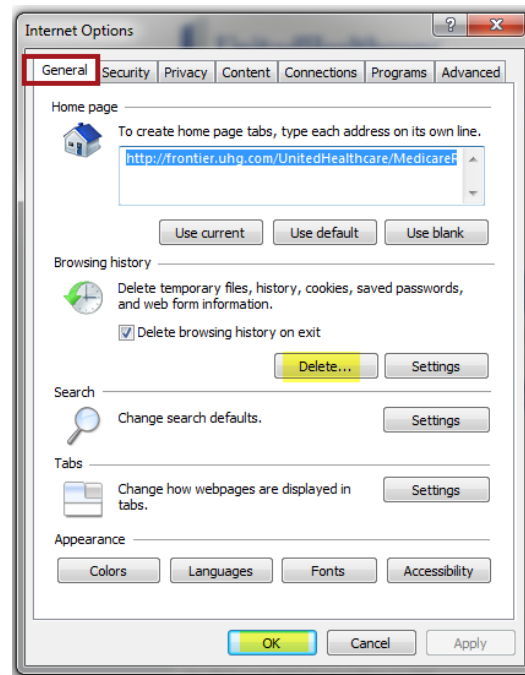
- Click the highlighted items.
- Click **Delete**.
- Launch a new browser window and log into the Learning Center.
- Retry launching the module you were experiencing problems with.
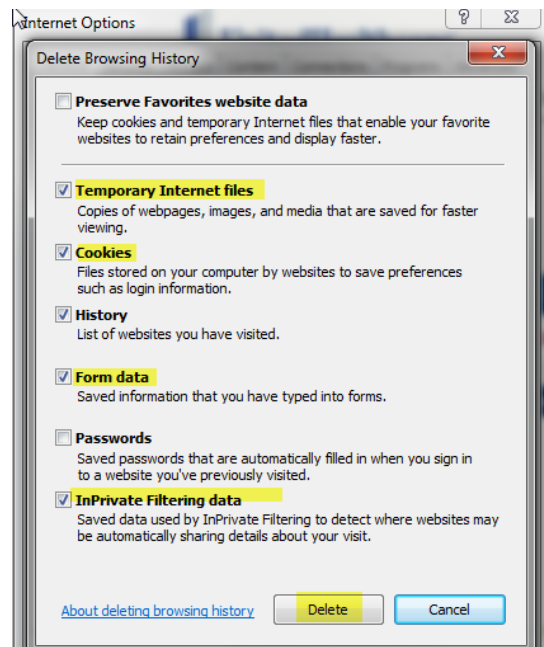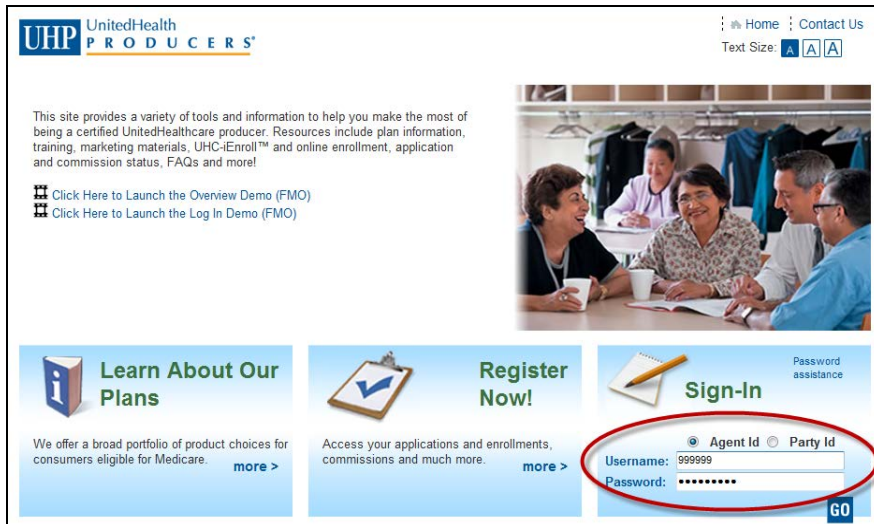
Internet Explorer 10 (IE 10) Troubleshooting

If you are using Internet Explorer 10, you may need to activate "compatibility view" mode within the browser. The following are two options for activating "compatibility view" mode.

Option 1--Setting Compatibility View for IE10 Using the Tools Option

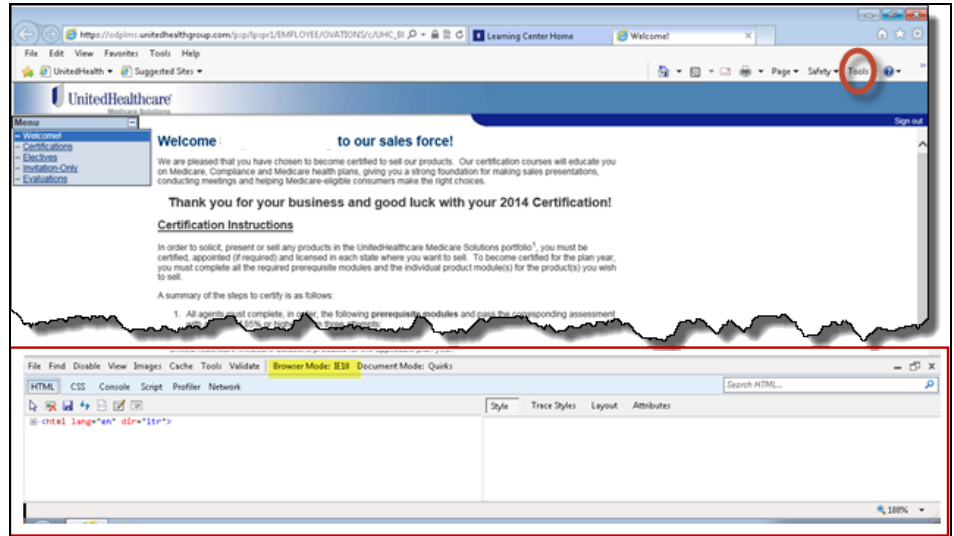IE10 should allow you to set your compatibility mode using the Tools Options as shown below:

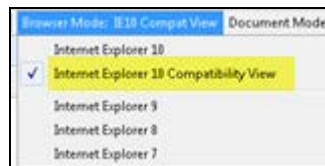- Log into the portal as you normally would do (unitedhealthadvisors.com or unitedhealthproducers.com)

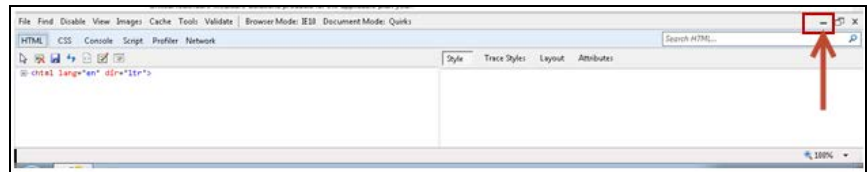- Click on the **Learning Center Tab**.
- Click on **Learning Center Home**.

- Click on **Tools**

- Click on **Compatibility View**
- The screen will flash
- You will see the **Compatibility View** has a check mark (now activated)
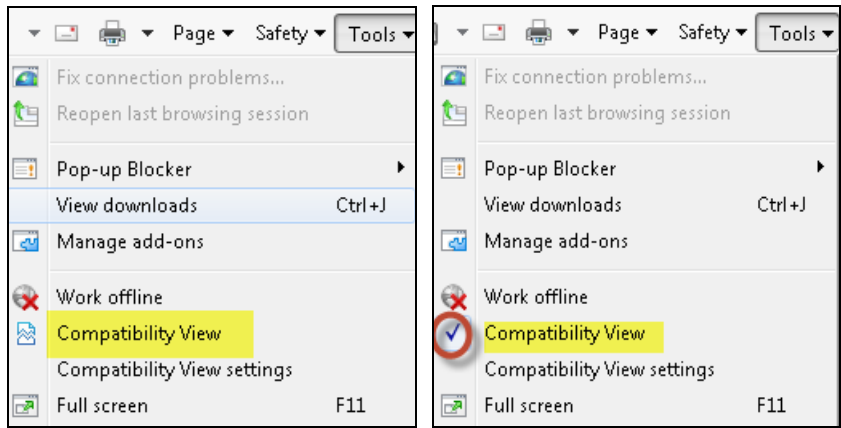
You should be able to launch and take the certifications modules/tests.

Note: Please be sure to check this setting regularly to ensure it remains in compatibility view mode. Please also check this each time you exit and relaunch the browser.

Option 2--Manually Setting Compatibility View for IE10

If setting the compatibility view through the Internet tools is not successful, you can also set the compatibility mode manually as shown below:

- Log into the portal as you normally would do (unitedhealthadvisors.com or unitedhealthproducers.com)
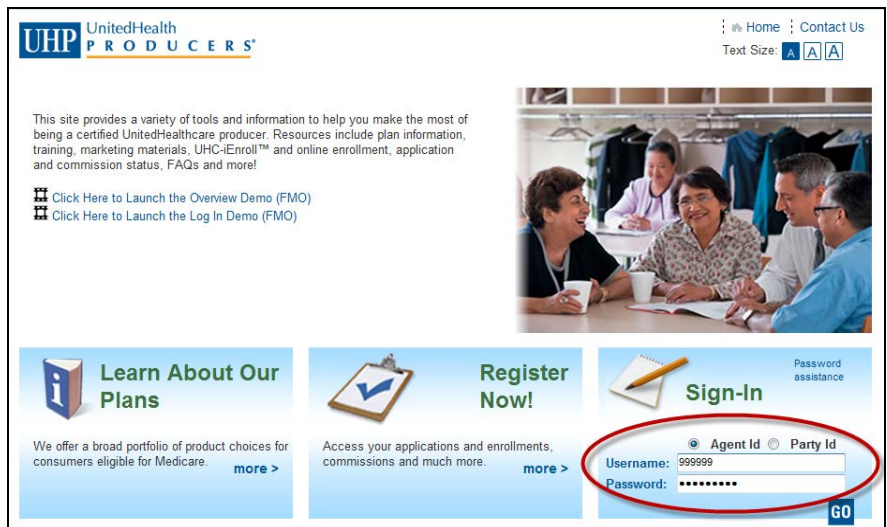
- Click on the **Learning Center Tab**.
- Click on **Learning Center Home**.
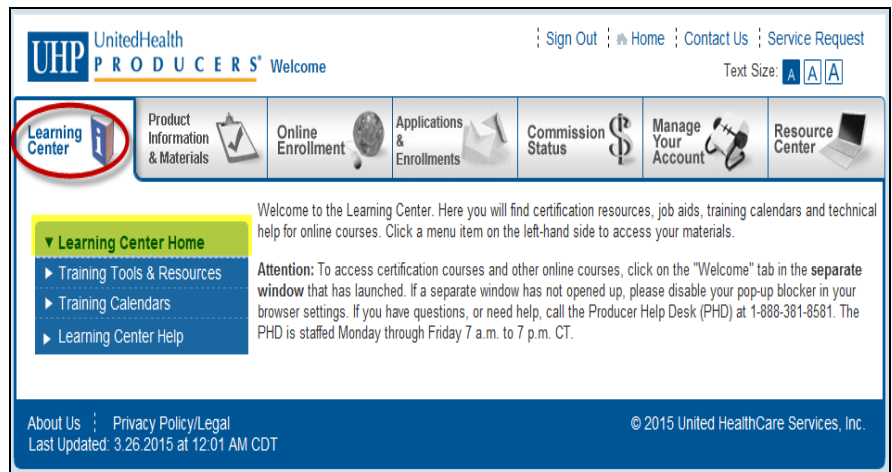
- Press the **F12** key on your keyboard.
- A window appears at the bottom of your screen.
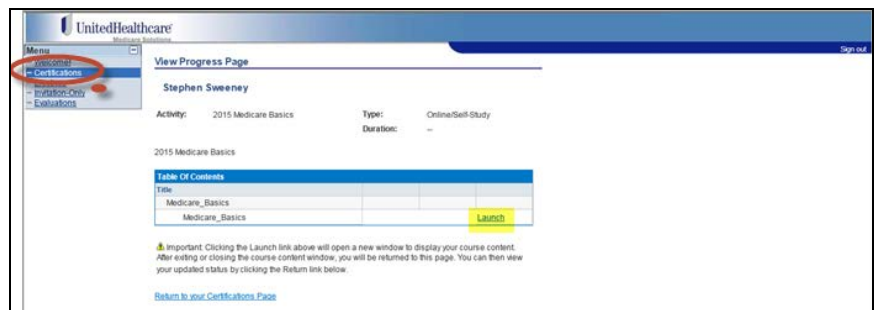- Click **Browser Mode: IE10**

- Click on **Internet Explorer 10 Compatibility View**
- The screen will flash

- Minimize (don't close) the compatibility window.

- Click **Certifications**
- Click **Launch** and complete the appropriate module and/or test

Note: You will need to redo these steps each time you exit and relaunch the browser.

Internet Explorer 11 (IE 11) Troubleshooting

If you are using Internet Explorer 11, you may need to activate "compatibility view" mode within the browser.

IE11 should allow you to set your compatibility mode using the Tools Options as shown below:

- Log into the portal as you normally would do (unitedhealthadvisors.com or unitedhealthproducers.com)

- Click on the **Learning Center Tab**.
- Click on **Learning Center Home**.

- Click on **Tools**

- A pop up window with "unitedhealthgroup.com" pre-loaded will appear
- Click the **Add** button
- Unitedhealthgroup.com should now be populated in the lower box (this sets the compatibility mode for your browser:
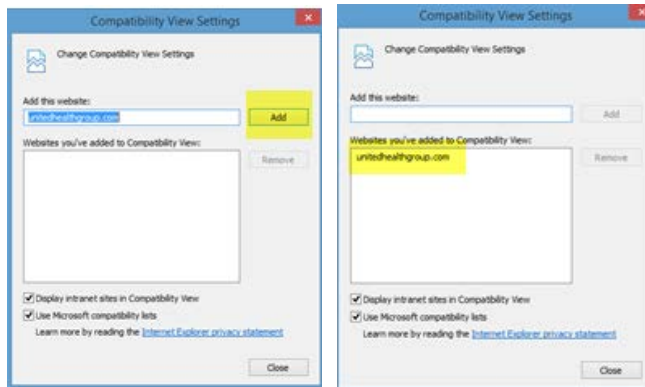
You may need to reset the compatibility view mode each time the exit and relaunch your browser.

Safari on Windows 7 Troubleshooting
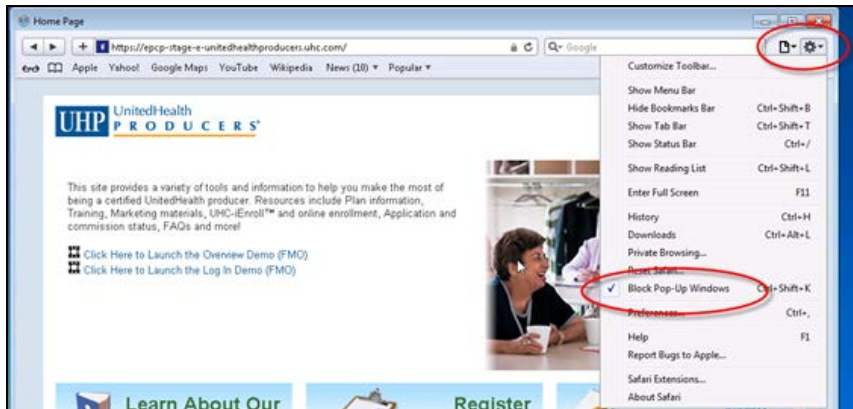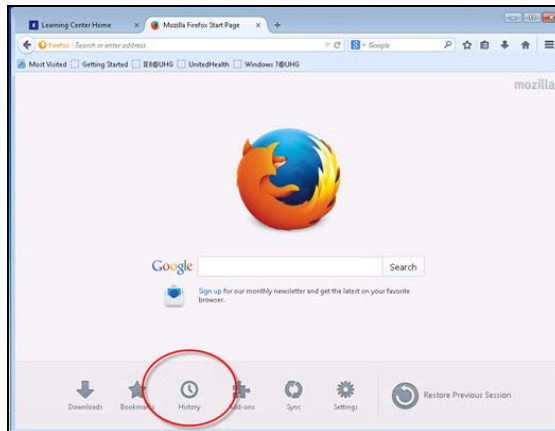
Clearing Cache/History/Cookies in Safari

While in the Safari browser:
- Click **Tools**
- Click **History**
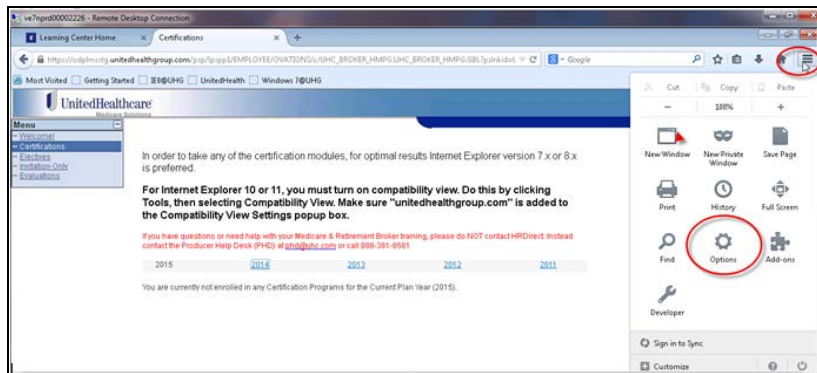
- Right click **History**
- Click **Delete**
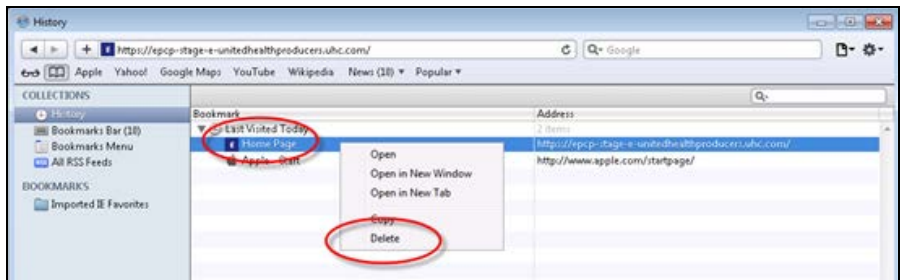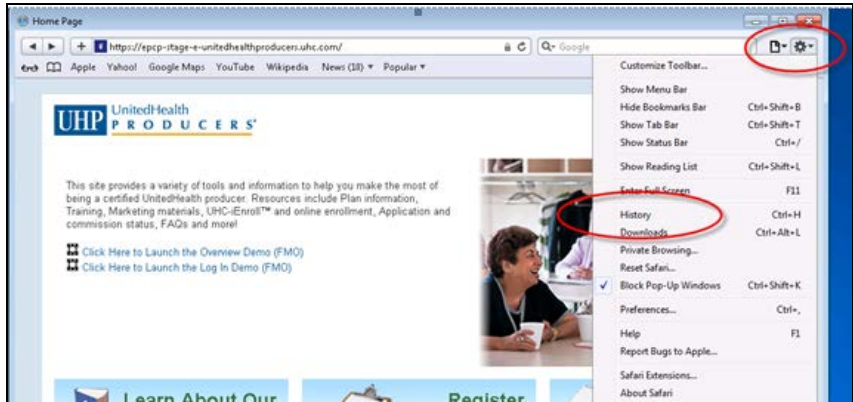
Turning Off Pop-Up Blockers in Safari

- Launch Certifications as you normally would
- Click **Tools**
- Click **Block Pop-Up Windows**

You may need to reset the compatibility view mode each time the exit and relaunch your browser.

Firefox 31 on Windows 7 Troubleshooting

Clearing Cache/History/Cookies in Firefox 31

While in the Firefox 31 browser:
- Click **History**

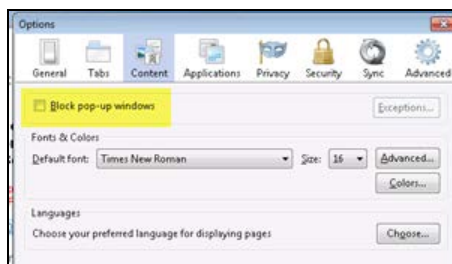- Right click **History**
- Click **Delete**
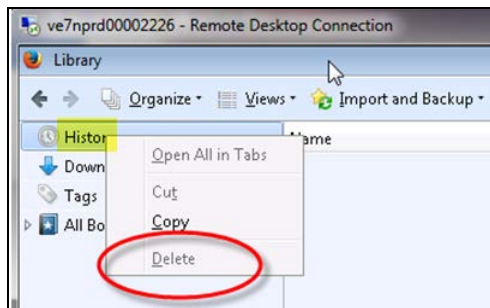
Turning Off Pop-Up Blockers in Firefox 31

- Launch Certifications as you normally would
- Click **Menu**
- Click **Options**

- Uncheck the **Block pop-up window**

You may need to reset the compatibility view mode each time the exit and relaunch your browser.

Clearing Cache/History/Cookies in Chrome
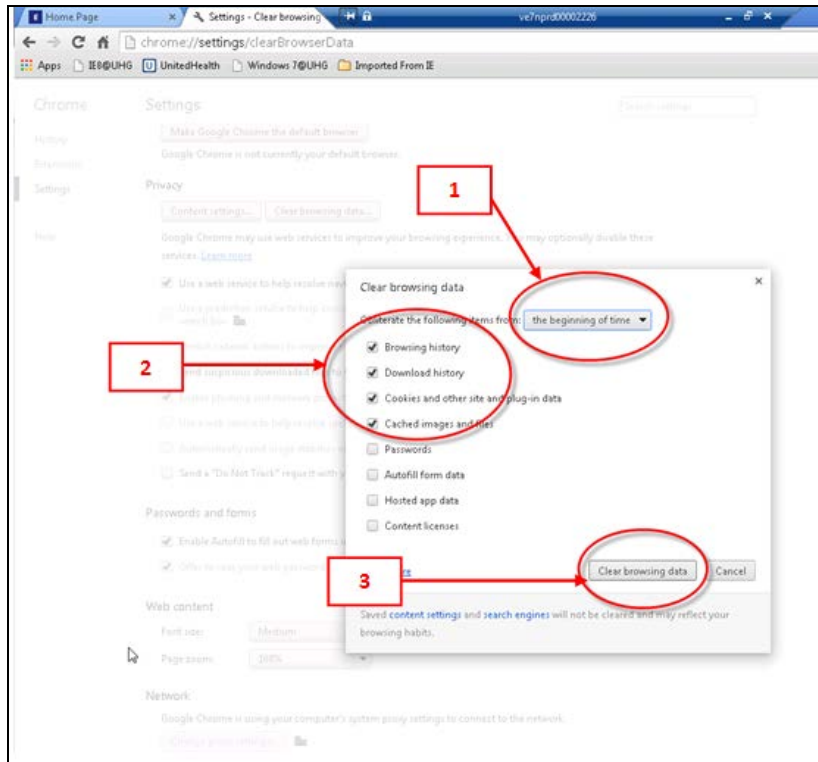
While in the Chrome browser:
- Click **Menu**
- Click **History**

- Click **Clear Browsing History**
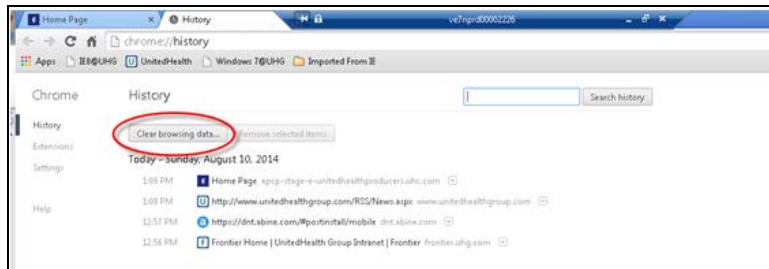
1. Click drop down arrow and select **the beginning of time**

2. Click these boxes: **Browsing History**, **Download History**, **Cookies and other site and plug in data**, and **Cached images and files**
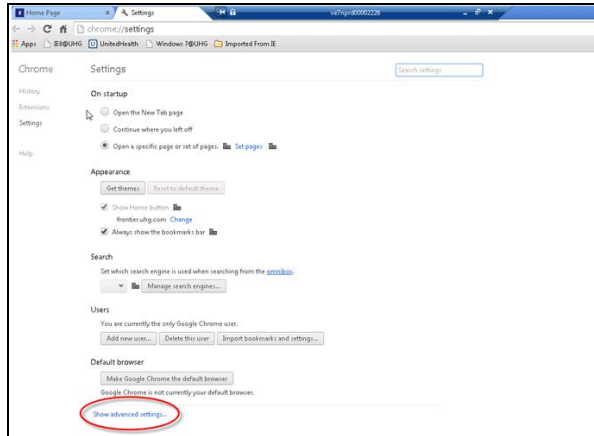
3. Click **Clear Browsing History**

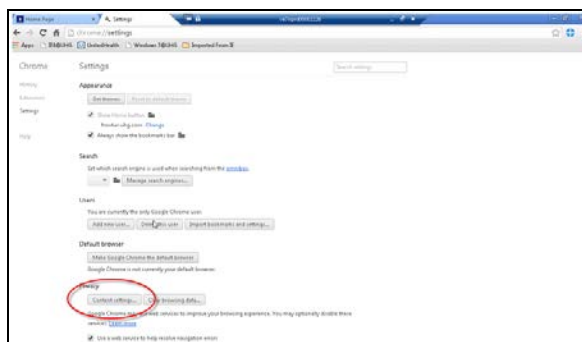## Turning Off Pop-Up Blockers in Chrome

- Launch Certifications as you normally would
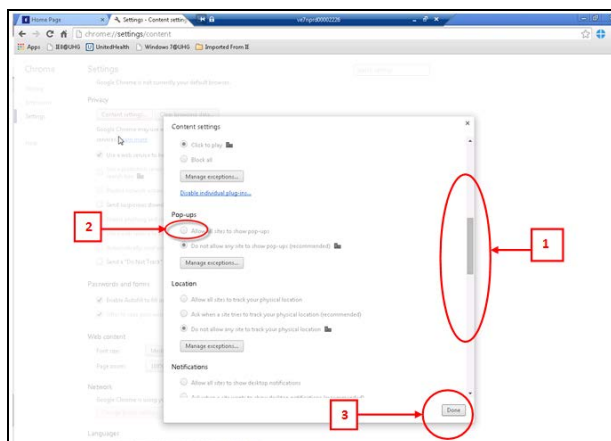- Click **Menu**
- Click **Settings**

- Click **Show Advanced Settings**

- Click **Content Settings**

1. Scroll down using sidebar until **Pop-ups** shows
2. Check the radio button **Allow all sites to show pop-ups**
3. Click **Done**

Close all tabs and return to your browser.

Safari on Mac Computers Troubleshooting

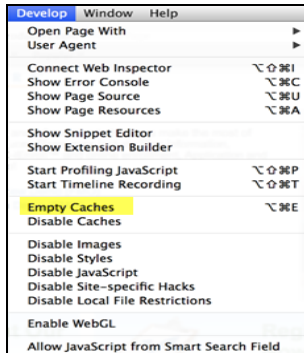### Clearing Cache/History/Cookies in Safari on Mac (Parts 1 and 2)

Part 1

- Launch Safari on the Mac computer
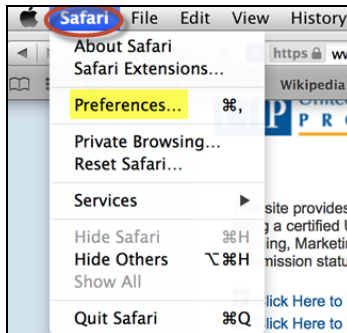- Click **Develop** from the menu bar at the top of the screen

If the **Develop** option is not on the menu bar at the top of the screen, please follow directions in section titled "Adding Develop Option to Safari Menu Bar" below.
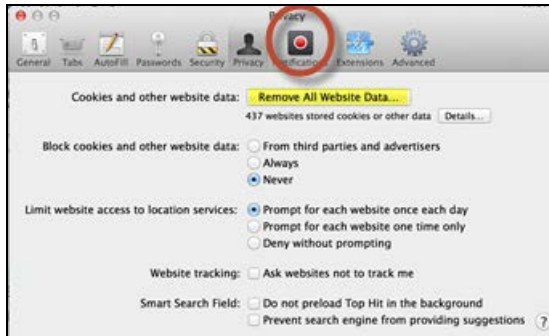
- Click **Empty Caches**

Part 2

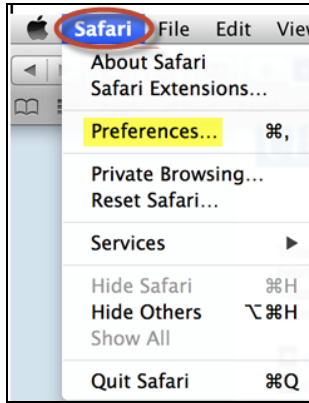- Click on **Safari**
- Click on **Preferences**
-

- Click on **Privacy**
- Click on **Remove All Website Data**

Turning Off Pop-Up Blockers in Safari on Mac

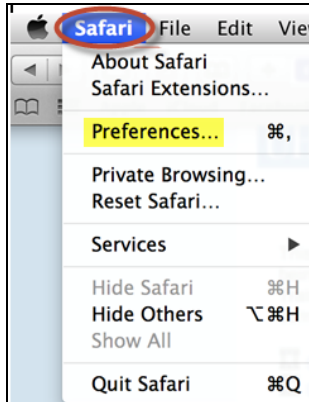- Click on Safari
- Click **Preferences**

- Click **Security**
- Uncheck **Block pop-up windows**

Adding Develop Option to Safari Menu Bar

This will add the "Develop" option to your menu bar and will allow you to delete cache and browsing history (Part 1 above).

- Click on Safari
- Click **Preferences**

- Click **Advanced**
- Click/check **Show Develop menu in menu bar**