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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.)



Institutional and Institutional-Equivalent Special Needs Plans UnitedHealthcare

> Senior Care Options UnitedHealthcare

Institutional and Institutional-Equivalent Special Needs Plans (invitation only)

Senior Care Options (invitation only)

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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
 <u>www.UnitedHealthProducer</u>s.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.



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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.

Menu	
- Welcome!	
- Certifications	
- Electives	
- Invitation-Only	

Evaluations

2016	2015 2	2014 2	013	2012
016 Prerequisite	25			
2016 Medicare Ba	eice	Status	Date Completed	
2016 Medicare Ba			05/27/2015	
		*	05/27/2015	
2016 Ethics and C		2		
2016 Ethics and C	Compliance Test	4	05/27/2015	
016 AHIP (EDC C	Only)			
		Status	Date Completed	
2016 AHIP (EDC C	Only)	-	bute completed	
016 AARP Medio	care Advantage Plans (HMO, PPO, I	POS, PFFS) Certification		
		Status	Date Completed	
2016 Medicare Ad	vantage Plans (HMO, PPO, POS, PFFS)	4	05/27/2015	
	vantage Plans (HMO, PPO, POS, PFFS) vantage Plans (HMO, PPO, POS, PFFS) 1		05/27/2015	
2016 Medicare Ad	vantage Plans (HMO, PPO, POS, PFFS)	Fest ᠔	05/27/2015	
2016 Medicare Ad		rest 🕚		
2016 Medicare Ad	vantage Plans (HMO, PPO, POS, PFFS)	Fest ᠔	05/27/2015 Date Completed 05/27/2015	Prin

2016 EDC Electives

	Status	Date Completed
2016 Events Basics	-	
2016 Events Basics Test	-	

Invitation-Only Online Courses Status Date Completed 2015 Sales Compliance Remediation - Operational Behavior Image: Compliance Remediation - Operational Behavior Test 03/23/2015 2015 Sales Compliance Remediation - Operational Behavior Test Image: Compliance Remediation - Operational Behavior Test Image: Compliance Remediation - Operational Behavior Test

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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.

 Status Date Completed

 2015 Chronic Condition Special Needs Plans (CSNP)
 Image: Completed of the special Needs Plans (CSNP)

 2015 Chronic Condition Special Needs Plans (CSNP) Test
 Image: Odd Plans (CSNP)

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

Print

03/20/2015

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
 - o Click on properties
 - o 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

Internet Options
General Security Privacy Content Connections Programs Advanced
Home page
To create home page tabs, type each address on its own line.
http://frontier.uhg.com/UnitedHealthcare/MedicareF
Use current Use default Use blank
Browsing history
Delete temporary files, history, cookies, saved passwords, and web form information.
Delete browsing history on exit
Delete Settings
Search
Change search defaults. Settings
Tabs
Change how webpages are displayed in Settings tabs.
Appearance
Colors Languages Fonts Accessibility
OK Cancel Apply

- 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)
- UHP PRODUCERS Home Contact Us Text Size: 🗛 🗛 🗛 12 This site provides a variety of tools and information to help you make the most of being a certified UnitedHealthcare producer. Resources include plan information, training, marketing materials, UHC-iEnroll™ and online enrollment, application and commission status, FAQs and more! Click Here to Launch the Overview Demo (FMO) Password assistance Learn About Our Register Sign-In Plans Now! We offer a broad portfolio of product choices for Agent Id O Party Id Access your applications and enrollments consumers eligible for Medicare. commissions and much more Username 999999 more > more > word GO UnitedHealth Sign Out A Home Contact Us Service Request PRODUCERS' Welcome, Text Size: A A A Commission Status Product Applications Manage 🍂 Resource Center Learning Center Online Enrollment Information Your Account & Materials Enroliments Welcome to the Learning Center. Here you will find certification resources, job aids, training calendars and technical help for online courses. Click a menu item on the left-hand side to access your materials. ▼ Learning Center Home
- Click on the Learning Center Tab.
- Click on Learning Center Home.

Click on Tools



PHD is staffed Monday through Friday 7 a.m. to 7 p.m. CT.

Attention: To access certification courses and other online courses, click on the "Welcome" tab in the separate window that has launched. If a separate window has not opened up, please disable your pop-up blocker in your

browser settings. If you have questions, or need help, call the Producer Help Desk (PHD) at 1-888-381-8581. The

Training Tools & Resources

Training Calendars

Learning Center Help

- Click on Compatibility View
- The screen will flash
- You will see the Compatibility View has a check mark (now activated)

Ŧ	🖃 🖶 🔻 Page 🕶 Safety 🔹	Tools 🗸	-	🖃 🖶 💌 Page 🕶 Safety	 Tools
<u>a</u>	Fix connection problems Reopen last browsing session		2	Fix connection problems Reopen last browsing session	
•	Pop-up Blocker View downloads	► Ctrl+J		Pop-up Blocker View downloads	► Ctrl+J
रण	Manage add-ons		<u>~</u>	Manage add-ons	
Q	Work offline			Work offline	
	Compatibility View Compatibility View settings		\checkmark	Compatibility View Compatibility View settings	
2	Full screen	F11	_	Full screen	F11

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" preloaded will appear
- Click the Add button
- Unitedhealthgroup.com should now be populated in the lower box (this sets the compatibility mode for your browser:

Compatibility View Setting		Compatibility View Settings	
Change Compatibility View Settings		Change Compatibility View Settings	
Add this website:		Add this vebsite:	
interhealthgroup com	Add		801
Websites you've added to Compatibility View:	-	Websites you've added to Compatibility View:	
	Remove	unitedhealthgroup.com	Renove
Display intranet sites in Compatibility View		Deplay intranet sites in Compatibility Vew	
Use Microsoft compatibility lists Learn more by reading the <u>Internet Explorer privac</u>	ustelenent	Use Microsoft compatibility lists Learn more by reading the <u>Internet Explorer Interact</u>	datement.
	Close		

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

	💈 Mozilla Firefox Start Page 🛛 🗙 🔰							_
O Firefox 1 Search or enter address		~ C	S + Google	ρ	合自	+	ŧ	=
Most Visited 🗌 Getting Started 🛄 IEB	ØUHG 门 UnitedHealth 门 Windows	7@UHG						
							moz	illa
	1							
	Carda							
	Google		Search					
	Google Sign up for our monthly browner.	newsletter and get the						

- Right click History
- Click Delete

J Library	h	>
e > 9	Organize 🔹 📗 Views 🔹 🏠	, Import and Backup ▼
(C) Histor		
🕹 Down	Open All in Tabs	
📎 Tags	Cuţ	
🛐 All Bo	Copy	
	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.

Chrome/Chromebook on Windows 7 Troubleshooting

Home Page

Chrome

History

-> C fi D ch

III Apps 🗋 IE8@UHG 🕕 UnitedHealth 🗋 Wind History

K Ø History

me://history

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



Search history

1.00

R

Turning Off Pop-Up Blockers in Chrome

Launch Certifications as you • normally would

Click Show Advanced

Click Content Settings

Pop-ups shows

3. Click Done

2. Check the radio button Allow all sites to show pop-ups

Click Menu •

•

•

Click Settings

Settings



Close all tabs and return to your browser.

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

Click Empty Caches

Ś	S	afari	File	Edit	View	v History	Bookm	arks C	Develop	Window	Help		
•				-	+ 4	Apple Inc. 🔒	discussion	ons.apple	com/thre	ad/4448839)?tstart=0	— How do I clear cache in Safari now?	Apple Supp
	ш	Apple	iClo	ud Fa	cebook	Wikipedia	Yahoo!	News T	Popular	₹.			

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.

Develop Window Help	
Open Page With	•
User Agent	•
Connect Web Inspector	て合業
Show Error Console	\C#C
Show Page Source	7. H U
Show Page Resources	て第A
Show Snippet Editor	
Show Extension Builder	
Start Profiling JavaScript	て企業P
Start Timeline Recording	て合業T
Empty Caches	\ C #E
Disable Caches	
Disable Images	
Disable Styles	
Disable JavaScript	
Disable Site-specific Hacks	
Disable Local File Restrictions	
Enable WebGL	
Allow JavaScript from Smart Sear	ch Field

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

⊖ ⊖ ⊖	Advanced
General Tabs AutoFill Passwords Security	Privacy Notifications Extension
Accessibility	Never use font sizes smaller than 9 *
	Press Tab to highlight each item on a webpage Option-Tab highlights each item.
Bonjour	: Include Bonjour in the Bookmarks menu Include Bonjour in the Favorites bar
Internet plug-ins	: Stop plug-ins to save power
	Plug-ins start automatically on 12 websites Details
Style sheet	None Selected
Default encoding	: Western (ISO Latin 1)
Proxies	Change Settings
	whow Develop menu in menu bar

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