

Agent Quick Reference Guide



The Agent Producer Help Desk (PHD) is here to help!

For member-related issues, call the UnitedHealthcare PHD at **1-888-381-8581 (Monday - Friday, 8am - 10pm ET)** and follow the telephone prompts for Application Status or Member Services. Please do not send emails to the Producer Help Desk for member-specific issues.

If you have questions that are **not related to a specific member**, such as commissions, certifications, etc., you may call or email the PHD at phd@uhc.com (please include your agent Writing Number in the email subject line).



Email is UnitedHealthcare's Primary Method of Communicating with Agents

Be on the lookout for emails from the following email addresses:

- uhc_med_sup_no_reply@uhc-info.com
- uhcgovt_sales@uhc.com



Visit **Jarvis** at www.uhcjarvis.com for Your Online Agent Resources

Jarvis was designed to provide a faster and easier way to get to all of the vital information you need to be a successful agent. Things you will find on Jarvis.

Home Page

Provides current happenings across UnitedHealthcare Medicare Solutions and within the industry.

Sales and Marketing Tools

Gives access to the **UnitedHealthcare Sales Materials Portal and Toolkit**.

Enrollment

This tab is especially important when using our online enrollment tool, **LEAN™**.

Application Status

Shows a view of the current status of applications that were submitted.

Commissions

Provides a view of commission status, statements and production summaries.

Knowledge Center

One-stop shop to take certifications, trainings, access to product overviews and agent account information.



The **UnitedHealthcare Sales Materials Portal and Toolkit** house different marketing materials, but all can be accessed by logging into Jarvis. Once on Jarvis, navigate to the **Sales & Marketing Tools**, then locate the **Sales Materials Portal, and UnitedHealthcare Toolkit** for these materials (list not all-inclusive).

Sales Materials Portal	UnitedHealthcare Toolkit
<ul style="list-style-type: none"> Enrollment Kits (can be personalized) - new sales Enrollment Kits - plan changes Agent Producer Handbooks Printed Non-Personalized Brochures and Fact Sheets Product Availability Chart 	<ul style="list-style-type: none"> Lead Generation Campaigns Sales Presentations Personalized Fact Sheets and Brochures A2O Elite Materials Brochures Marketing Materials Catalog



Commonly Searched Resources

- **Your Guides and General Eligibility Guides** – Jarvis > Knowledge Center > Medicare Supplement > Eligibility/Availability
- **Underwriting and Rate Guides/Drug Lists, Plan Changer Rate Pages and Annual Rate Changes** – Jarvis > Knowledge Center > Medicare Supplement > Rates & Underwriting
- **Agent Servicing Forms** – Jarvis > Enrollment > Application Status > Important Documents (scroll to bottom)
- **Agent-Directed Group Sales on Jarvis** – Jarvis > Knowledge Center > Medicare Supplement > Additional Opportunities



Looking for Training? Visit the National Training Calendar on Jarvis/Learning Lab

Jarvis > Knowledge Center > Training > Learning Lab > Training Calendar

Below are some of the trainings found to be very helpful to agents:

- Online Enrollment via LEAN™ for AARP Medicare Supplement Plans
- 60 Minutes to Success
- Health and Wellness Resources for AARP Medicare Supplement Plans
- Refresh Your Success



Learn more about the Authorized to Offer (A2O) Program on Jarvis

The Authorized to Offer (A2O) AARP® Medicare Plans Agent Program differentiates A2O agents by providing exclusive opportunities to AARP-branded marketing materials, lead program, and rewards program, depending on the agent's status level.

Jarvis > Sales & Marketing Tools > Authorized to Offer

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