

2017 Certification User Guide

EDC Agents
(External Distribution Channel)



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2017 Annual Certification Requirements

To solicit, present or sell any products in the UnitedHealthcare Medicare Solutions portfolio (may include plans branded UnitedHealthcare, AARP, Medica HealthCare Plans, Preferred Care Partners, or Sierra), 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 6 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 6 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

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 2017 AHIP Certification before any other 2017 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 **before starting the 2017 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:

- AARP Refresher (Traditional course for returning producers)
- AARP Membership Benefits
- AARP Good Works
- AARP Communicating with Today's 50+ Consumer
- AARP Being Relevant and AARP Multicultural Engagements

Step 2: Complete Product Test(s) and/or Module(s)

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)

CMS Fraud, Waste and Abuse Requirement

Effective January 1, 2016, all agents must attest annually to completing the Centers for Medicare & Medicaid Services (CMS) Fraud, Waste, and Abuse (FWA) training. UnitedHealthcare captures the attestation as part of the annual Pledge of Compliance, which you must sign at the beginning of the Ethics and Compliance certification test by selecting the “I Agree to Comply” button.

Agents have two options for completing the CMS FWA training:

1. Take the CMS FWA course available on the CMS website. Instructions and a link are provided within the Ethics and Compliance module.
2. Take the CMS FWA course as part of AHIP certification.

All agents must complete, retain, and make available upon request the certificate of completion that can be found at the end of the CMS Fraud, Waste, and Abuse training.

After completing the CMS FWA course, complete the 2017 Ethics and Compliance Test (course is optional) and attest to completing the CMS FWA training.

AHIP Certification Instructions

AHIP Certification is voluntary. If you elect to do this, you will receive a \$50 discount off of the first AHIP purchase. You must first enter the site by going through the www.unitedhealthproducers.com Learning Center to access the AHIP link found on the certification page. Also, after you begin the 2017 Medicare Basics Test, you will **not** be allowed to select AHIP for certification.

AHIP Certification satisfies the requirement for the following UnitedHealthcare Medicare Solutions Certification Modules: 2017 Medicare Basics, 2017 Medicare Advantage Plans and 2017 Medicare Prescription Drug Plans. If you choose the AHIP option, you will also be required to complete the following prerequisites: 2017 Ethics and Compliance and 2017 AARP Course. UnitedHealthcare will accept your AHIP certification and display any other required modules. As with other requirements, you have six attempts to pass the assessments at 90% (UHG only recognizes the first two purchases).

Note: As part of the AHIP Certification process, AHIP requires completion of the CMS Fraud, Waste, and Abuse course. You will be asked if you need to take the training or not. If you do need the training, click on the appropriate link. If you don't need the training, click on the “proceed to attestation” link. Please note that if you have completed AHIP's version of the CMS Fraud, Waste, and Abuse course, you will not need to go through it again. Agents will simply attest to having completed the CMS requirement via the attestation in the 2017 Ethics and Compliance Test.

If you choose to certify via AHIP, you need to complete the 2017 AHIP Certification before any other 2017 Certification modules. Failure to do so will result in AHIP score rejection.

To begin 2017 UnitedHealthcare Medicare & Retirement certification using AHIP, complete the following steps:

1. Log into www.UnitedHealthProducers.com
2. Click Learning Center
3. Click on “Certification” (Left-hand navigation menu)
4. Click “2017 AHIP (EDC Only)”
5. Select OK to the following two pop-up messages

6. Click "Launch"
7. Sign on with your AHIP username and password **OR** register if you are a new AHIP user
8. Select "Medicare Course Home"
9. Complete the assigned modules
 - Returning AHIP users will be assigned the recertification modules
 - New AHIP users will be assigned the full certification modules
10. Pass the test in 6 or fewer attempts with a score of 90% or higher
11. At the end of the test, go to the home page - Click "Transmit to United Healthcare"
12. Select the "I Comply" button when the Pledge of Compliance Screen appears
13. Once the "Congratulations" screen appears return to the development plan

Next, you **must** pass the following tests:

- 2017 Ethics and Compliance
- 2017 AARP® Course

REMINDER: For agents who choose to complete 2017 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 access any other 2017 modules. However, agents choosing to certify directly from the AHIP website or through another carrier will forfeit the UHC discount.

Logging In

Registered Users

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

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 8p.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.

Welcome to our sales force!

We are pleased that you have chosen to become certified to sell our products. Our certification courses will educate you on Medicare, Compliance and Medicare health plans, giving you a strong foundation for making sales presentations, conducting meetings and helping Medicare-eligible consumers make the right choices.

Thank you for your business and good luck with your 2017 Certification!

American Health Insurance Plan (AHIP) Certification satisfies the requirement for the following UnitedHealthcare Medicare Solutions Certification Modules: 2017 Medicare Basics, 2017 Medicare Advantage Plans and 2017 Medicare Prescription Drug Plans. If you choose the AHIP option, you will also be required to complete the following prerequisites: 2017 Ethics and Compliance and 2017 AARP Course. UnitedHealthcare will accept your AHIP certification and display any other required modules. Per policy, you must achieve a passing score of 90% within six attempts. Each purchase provides an opportunity to take the Final Exam three times. If you fail the first three attempts, you will be required to re-enroll and purchase another set of three attempts before proceeding. Upon re-enrollment you will have to repeat the required training modules before gaining access to the Final Exam again.

Remember: AHIP Certification is voluntary. If you elect to do this, you will receive a \$50 discount off the first AHIP purchase if you first enter the AHIP site by going through the www.unitedhealthproducer.com Learning Center, and click on the 2017 AHIP link found on your certification page. The discount only applies to the first purchase. Also, after you begin the 2017 Medicare Basics Test, you will not be allowed to select AHIP for certification.

See the "User Guide" for detailed instructions.

Technical Requirements

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

- Depending on your browser choice, you may need to turn on compatibility view. Do this by clicking Tools, then selecting Compatibility View. Make sure "[unitedhealthgroup.com](http://www.unitedhealthgroup.com)" is added to the Compatibility View Settings popup box
- Screen resolution of 1024 x 768
- Acrobat Reader version 6 or higher
- Macromedia Flash Player 10 or higher

If you have trouble launching a module, contact the Producer Help Desk (PHD): 888-381-8581 (Monday-Friday, 7 a.m. – 8 p.m. CST).

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

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

Menu

- Welcome!
- [Certifications](#)
- [Electives](#)
- [Invitation-Only](#)
- [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.

2017 Prerequisites		Status	Date Completed	
2017 Medicare Basics		✓	05/23/2016	
2017 Medicare Basics Test		✓	05/23/2016	
2017 Ethics and Compliance		✓	06/02/2016	
2017 Ethics and Compliance Test		✓	06/02/2016	
2017 AARP Course		–		

2017 AHIP (EDC Only)		Status	Date Completed	
2017 AHIP (EDC Only)		–		

EDC Agents choosing to certify via AHIP, click link above FIRST!

2017 AARP Medicare Advantage Certification		Status	Date Completed	
2017 Medicare Advantage Plans (HMO, PPO, POS, PFFS)		✓	05/23/2016	
2017 Medicare Advantage Plans (HMO, PPO, POS, PFFS) Test		✓	05/23/2016	05/23/2016

2017 AARP Medicare Supplement Plans Certification		Status	Date Completed	
2017 AARP Medicare Supplement Plans		✓	05/24/2016	
2017 AARP Medicare Supplement Plans Test		✓	05/24/2016	05/24/2016

2017 AARP PDP Certification		Status	Date Completed	
2017 Medicare Prescription Drug Plans		✓	05/24/2016	
2017 Medicare Prescription Drug Plans Test		✓	05/24/2016	05/24/2016

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.

2017 EDC Electives		
	Status	Date Completed
2017 Events Basics	-	
2017 Events Basics Test	-	

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.


Invitation-Only Online Courses		
	Status	Date Completed
Operational Issues v2	-	
Operational Issues Test v2	-	




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.

2017 AARP Medicare Advantage Certification			
	Status	Date Completed	
2017 Medicare Advantage Plans (HMO, PPO, POS, PFFS)		05/23/2016	
2017 Medicare Advantage Plans (HMO, PPO, POS, PFFS) Test		05/23/2016	05/23/2016

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 or higher with IE10, and IE11 or Microsoft Edge
- Mac Computers with Safari Browser
- Safari Browser on Windows 8 or higher
- Google Chrome on Windows 8 or higher
- Chromebook
- Firefox 38 or higher on Windows 8 or higher
- 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. – 8 p.m. CST

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