

Delegated Access – Individual & Family Plans

The **Delegated Access** functionality allows you to provide a colleague access to your **Jarvis** account. You can provide different levels of access to your delegate, see when the delegate last logged in, and change your delegate's access levels. The entire process takes no more than 2 minutes from start to finish for both the delegator and the delegate.

NOTE: Delegates may not engage in licensed sales activity. Licensed sales activity includes but is not limited to: (1) advising and individual on the suitability of a plan or plans based on the individual's needs; and (2) completing an enrollment application on behalf of an enrollee.

Granting Delegate Access

- Log into **Jarvis** at www.uhcjarvis.com with your OneHealthcare ID. Go to your Profile page by clicking on the dropdown next to your, or your agency's name. Click on the **Manage Account Info** button.
- Select **Delegated Access** from the options in the column on the left.

The screenshot displays the Jarvis Agent Support Center interface. At the top, the 'Agent Support Center' header is visible. A dropdown menu is open, showing 'AGENT NAME' and a 'Sign Out' button. Below this, the 'Manage Account Info' button is highlighted with a red box. The main content area shows the 'Change Agent ID' section with a profile picture and 'AGENT NAME' label. Below this, the 'WID:' label is visible. The bottom section shows the 'Account Info: Delegated Access' page. On the left, a list of options includes 'Personal Information', 'Licensure & Appointments', 'Certifications Status', 'Downline Hierarchy', and 'Delegated Access', with 'Delegated Access' highlighted by a red box. On the right, the 'Delegated Access' section shows 'ACTIVE' and 'INACTIVE' buttons, and a table with columns for 'Name' and 'Email'.

Delegated Access – Individual & Family Plans

- Select **Active** or **Inactive** to view a list of active and Inactive users. To add a new delegated user, click on the **Add New Delegated User** button.

The screenshot shows the 'Delegated User' management interface. On the left is a sidebar with links: Profile, Licensure & Appointments, Certifications, and Delegated Access (selected). The main area has a 'Delegated User' header with 'Active' and 'Inactive' filter buttons. Below these is a table with columns: Name (with a dropdown arrow), Email, One Healthcare ID, Access Level, Last Login, and Edit Access. An 'Add New Delegated User' button is located in the top right corner.

- Enter the First Name, Last Name and Email Address of a colleague whom you would like to grant access to your account. Click on the **Next** button.

The 'Add New Delegated User' form contains three input fields: 'First Name' (placeholder: Enter First Name), 'Last Name' (placeholder: Enter Last Name), and 'Email Address' (placeholder: Add Email). At the bottom are 'Cancel' and 'Next' buttons.

- Select the level of access that your colleague will receive your account as a delegate. Then click the **Submit** button. The delegate will receive an email requesting they register as a delegate.

Note: Only Agencies can select Level 5 access level

The 'AGENT NAME Choose Access Level' form shows five radio button options: Level 1, Level 2, Level 3, Level 4, and Level 5. Below is a table showing feature access for each level.

FEATURES	LEVEL 1	LEVEL 2	LEVEL 3	LEVEL 4	LEVEL 5
Home Page	✓	✓	✓	✓	✓
Sales Tools	✓	✓	✓	✓	
Knowledge Center	✓	✓	✓	✓	
Application Status	✓	✓	✓		
Agent Search	✓	✓	✓		
Book of Business (Member Profile Page)	✓	✓			
Commissions	✓	✓			
AccountInfo Page	✓	✓*			
Reporting	✓	✓			✓

* Can not view delegated access

For ALL Levels (1-5): Delegates will not have access to the Account Holder's Personal Information, Direct Deposit Information and Writing/Agent ID Table. Delegates will not have access to Jarvis functionality that is not available to the Account Holder.

At the bottom of the form are 'Cancel' and 'Submit' buttons.

Editing Your Delegate Access

You can edit your delegate access from the Account Info page, Delegated Access tab. You will see a list of all the individuals you have provided delegated access to. If the delegate does not have a One Healthcare ID listed in the One Healthcare ID column, this indicates the delegate has not completed the registration process.

Select the pen-inbox icon on the right to edit the access for the delegate.

The screenshot shows the 'Delegated User' section with tabs for Profile, Licensure & Appointments, Certifications, and Delegated Access. The Delegated Access tab is active, displaying a table with columns: Name, Email, One Healthcare ID, Access Level, Last Login, and Edit Access. The Edit Access column contains a pen-inbox icon, which is highlighted with a red box.

1. If a delegate user has not created a One Healthcare ID, you can resend the invitation by selecting the **Resend Registration Request** button.
2. If you wish to reassign an access level, you can select a new access level and click **Submit**.
3. To remove a delegate's access from your account, select **Remove Access**, then click the **Yes - Remove**, button.

Note: Only Agencies can select Level 5 access level

AGENT NAME

2

☐ Level 1 ☐ Level 2 ☐ Level 3 ☐ Level 4 ☐ Level 5

FEATURES	LEVEL 1	LEVEL 2	LEVEL 3	LEVEL 4	LEVEL 5
Home Page	✓	✓	✓	✓	✓
Sales Tools	✓	✓	✓	✓	
Knowledge Center	✓	✓	✓	✓	
Application Status	✓	✓	✓		
Agent Search	✓	✓	✓		
Book of Business (Member Profile Page)	✓	✓			
Commissions	✓	✓			
Account Info Page	✓	✓*			
Reporting	✓	✓			✓

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For ALL Levels (1-5): Delegates will not have access to the Account Holder's Personal Information, Direct Deposit Information and Writing/Agent ID Table. Delegates will not have access to Jarvis functionality that is not available to the Account Holder.

Cancel

Submit

Remove Access

1

Resend Registration Request

Are you sure you want to remove access for
AGENT NAME?

3

Cancel

Yes - Remove

How to access Jarvis as a Delegate

You will receive an invitation to your email address that provides the opportunity to register as a delegated user. Select [Click Here](#) from the invitation to your email.

From: no_reply@optum.com <no_reply@optum.com>

Sent:

To:

Subject: Sign-in or Register as delegated User invite

Hello User,

Welcome to *Jarvis*! You have been invited to become a *Jarvis* delegate for AGENT NAME. Upon registration, you will become eligible to access *Jarvis* on behalf of AGENT NAME.

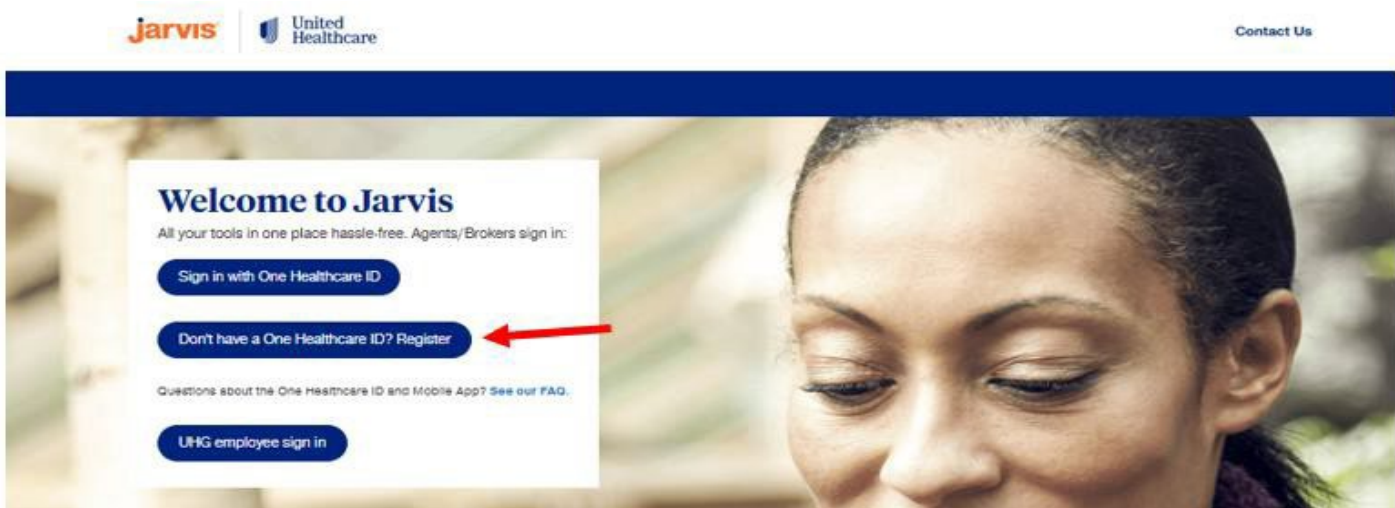
Directions:

1. Please [click here](#) to complete the registration process.
2. Select the register hyperlink to complete the steps. As part of registration process, enter the email address from which you received the invitation to delegated access.
3. Log in as a delegate.

Thank you very much from,
The UnitedHealthcare *Jarvis* Team

Delegated Access – Individual & Family Plans

Select [Register](#) on the left side of the screen. **Do NOT click the register button at the top right.**



Create your One Healthcare ID. Please note the rules for your ID and Password. When completing the registration process as a delegate, you will need to associate your One Healthcare ID with the same email where you received the registration request.

If you already have a One Healthcare ID, click the [Sign in](#) link.

Read and click [I Agree](#) to the [Terms of Use](#) and [Website Privacy Policy](#) and then [Continue](#).

Create One Healthcare ID

Already a User? [Sign In](#) * Required Fields

First Name*

Last Name*

Email Address*

Create One Healthcare ID* (Username)

Password*

Confirm Password*

Phone Number

+1 555-555-5555

You must agree to the [Terms of Use](#) and [Website Privacy Policy](#) to use the One Healthcare ID service. If you do not agree, do not use any aspect of the One Healthcare ID service.

[Continue](#)

Delegated Access – Individual & Family Plans

The next step is to verify your email address. Check your email and open the message from One Healthcare ID-NoReply <noreply@onehealthcareid.com>.

Click on **Activate my One Healthcare ID** or copy and paste the 10-digit code provided. You will be notified that your email address has been verified. Click the **Continue** button.

From: One Healthcare ID-NoReply <noreply@onehealthcareid.com>
Date:
To:
Subject: Confirm your One Healthcare ID email address

One Healthcare 

Your One Healthcare ID

[Activate my One Healthcare ID](#)

If you prefer, copy this 10-digit code **1234567890** and paste it into the box for the activation code on the Activate Your One Healthcare ID page.

If you did not request an activation link or code, or if you have questions about setting up an One Healthcare ID, contact us at 1-855-819-5909 or optumsupport@optum.com.

Thank you,

One Healthcare ID



Success

Email address is verified.

Continue

Log into **Jarvis** using the One Healthcare ID and password you created as part of the delegate registration.

Delegated Access – Individual & Family Plans

You will navigate **Jarvis** as a representative of the delegator's account.

The screenshot shows the Jarvis dashboard interface. At the top, there are logos for Jarvis and United Healthcare, and links for Agent Search and Agent Support Center. Below this is a dark blue navigation bar with links: Home, Contracting, Sales Tools (with a dropdown arrow), Applications, Commissions (with a dropdown arrow), Book of Business, Knowledge Center (with a dropdown arrow), and Reporting. A search bar labeled 'Search Jarvis' is on the right. The main content area is divided into two columns. The left column has a 'Welcome,' message, a redacted name, a 'WID' field with a redacted value, and a blue button labeled 'IFP Agent'. The right column has a 'Quick Access' section with 'Favorites (0)' and a message: 'No favorites yet. Select a star next to a quick link to add to your favorites.'

If you are a delegate for more than one account, you will be prompted to select the delegator's account you wish to access.

A modal dialog box titled 'Login As :'. It contains two radio button options: 'Agent Name 1' and 'Agent Name 2'. At the bottom, there are two buttons: 'Cancel' and 'Submit'.

If you are a delegate for more than one account, and you wish to switch while already logged into **Jarvis**, select **Switch Accounts Users** at the top of the page.

This screenshot is similar to the first one but includes a yellow banner at the top that reads: 'You are now accessing JARVIS as: , Agent Name , (PID:) (WID:)'. A red box highlights a button labeled 'Switch Accounts users' on the right side of this banner. The rest of the dashboard layout, including the navigation bar and main content area, is identical to the first screenshot.

Delegate Attestation

The delegated access attestation process is required annually. Each year on June 1, a banner will appear in Jarvis to remind you to complete the delegate attestation for each of your delegates.

 **Delegate Attestation Notice**
Delegate attestation is now open. Please verify and attest all applicable delegate assignments.
[Go to Delegate Attestation](#)

×

Any delegate whose attestation is not completed by June 30 will lose access to the system.

Reminder Emails

If you or your agency has delegates, you will receive up to 3 email reminders each year in the month of June, including:

- **ACTION REQUIRED:** Complete Delegate Attestation (sent on June 1)
- **REMINDER:** Delegate Attestation Deadline Approaching (sent on June 15)
- **NOTICE:** Delegate Accounts Deactivated Due to Incomplete Attestation (sent on June 29)

If no action is taken after the final notice, delegate access will automatically be removed on June 30.

If you have any questions, please feel free to contact the Producer Help Desk (PHD) at **1-866-235-4095**, TTY **711**, 8 a.m. to 7 p.m. CT, Monday - Friday. The PHD can also be reached during business hours via the chat feature in Jarvis.