

New Agent Start Guide

Your blueprint to building a strong business



[Get started](#)

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Welcome to UnitedHealthcare

Your clients aren't alone on their Medicare journey, and neither are you.

Count on UnitedHealthcare, the nation's most chosen Medicare Advantage¹ and Medicare Supplement² insurer to help you succeed. From tools that make it easier to manage your business, to resources that help you sell, support your clients and earn commissions, **this guide is designed to help you on your path to success.**



UHC Jarvis



Training



Resources
and recognition



Producer Help
Desk (PHD)



Ready to sell

¹ Most chosen based on total plan enrollment from CMS enrollment data, May 2026

² From a report prepared for UnitedHealthcare Insurance Company by Mark Farrah Associates, "December 2025 Medigap Enrollment & Market Share," May 2026, www.uhcmedsupstats.com or call 1-800-523-5800 to request a copy of the full report.

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UHC Jarvis, your one-stop shop

Head to Jarvis, your agent portal, for running your business, from learning to selling and everything in between.

Jarvis is where you can manage your book of business and access educational and training materials. It's also your gateway to the:

Sales Materials Portal

Download or order consumer facing materials to help you sell UnitedHealthcare Medicare Plans

UHC Agent Toolkit

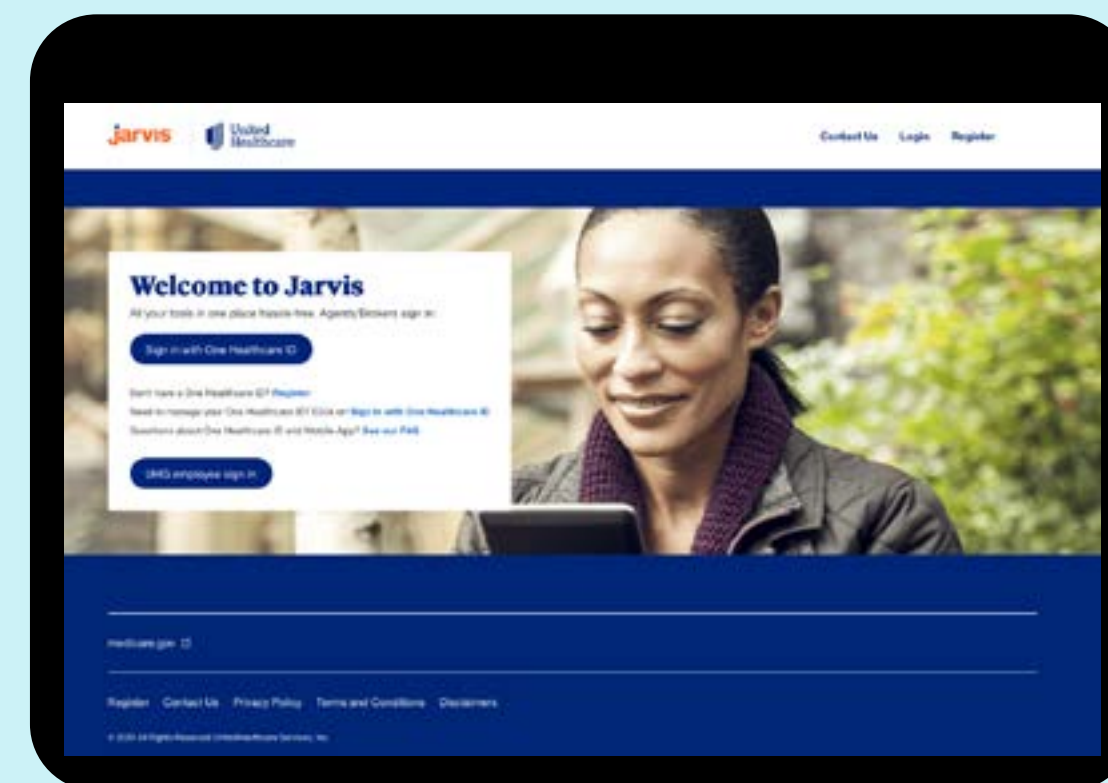
Access marketing materials to help you sell

Agent Guide

Contains the information you need to conduct business with UnitedHealthcare efficiently and compliantly

And more!

Get the Jarvis mobile app



Log in to Jarvis





Jarvis tools for the sales process

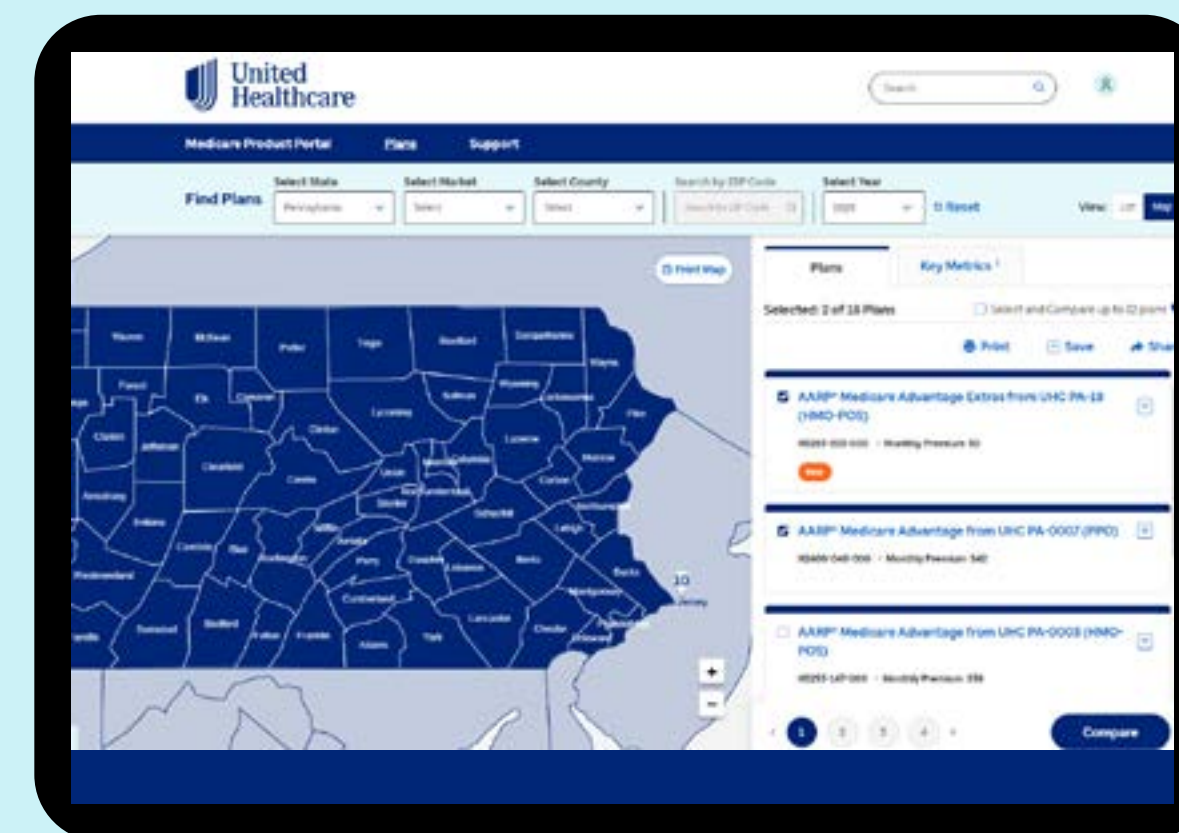
Step 1: Learn about plans in your area

The **Medicare Product Portal** is your resource for all UnitedHealthcare Medicare Advantage plan information. Everything you need is at your fingertips. You can easily search plans by market to view and compare benefits and plan details or save them to your profile for quick reference later.

You can also search for your local UnitedHealthcare leaders—they're available for support and ready to help.

For Medicare Supplement plan information, visit **Jarvis**, click **Sales Tools > Find a Plan**.

How to access the Medicare Product Portal



Under the “**Quick Access**” panel on the Jarvis homepage, select **Medicare Product Portal**

[Log in to Jarvis](#)





Jarvis tools for the sales process

Step 2: Find sales materials

The **Sales Materials Portal** makes it simple to order or download sales materials, including:

- Plan benefit highlights
- Enrollment Kits
- Drug formularies
- Benefit highlight brochures
- Annual Notice of Change (ANOC)
- Evidence of change documents

Reminder! For Medicare Supplement plans, don't forget to download a state-specific Producer Handbook for states you are licensed and appointed to sell in.



Get started today under the **“Quick Access”** panel on the Jarvis home page, then select **Sales Materials Portal**

Log in to Jarvis





Jarvis tools for the sales process

Step 3: Customize your marketing materials

The **UHC Agent Toolkit** provides ready-to-use, customizable marketing materials. You can easily add your contact information, plan details and more to confidently grow your business while staying compliant with CMS and other federal and state requirements.

On the Toolkit, you'll find:

- A wide range of sales and marketing materials like the Clarity Guide, postcards, flyers, banners, social media posts and more
- Helpful tips and videos for best practices in your outreach and education efforts
- Popular selections for direct mail, digital communications and in-person meetings

To get started, under the “**Quick Access**” panel on the Jarvis homepage, select **UHC Agent Toolkit**.

[Log in to Jarvis](#)





Jarvis tools for the sales process

Step 4: Enroll a client

JarvisEnroll, the electronic enrollment tool for all UnitedHealthcare Medicare Plans, is designed to help simplify and accelerate the enrollment process. Enrolling your clients electronically helps avoid clerical errors from paper applications and expedites the turnaround process. Use JarvisEnroll for the following:

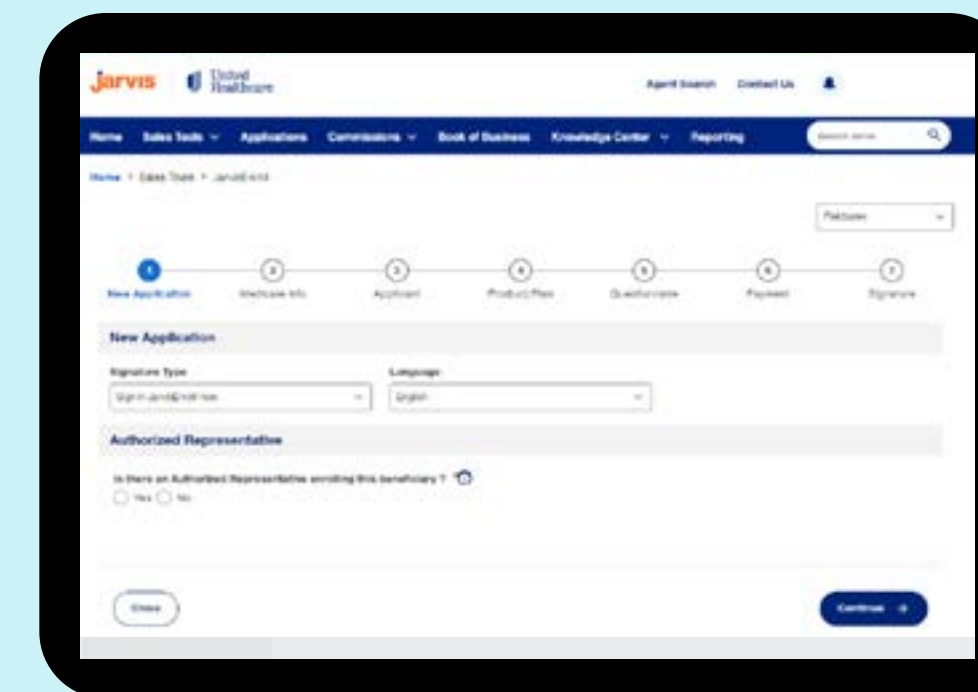
Medicare Advantage plans

- Application Signatures: In-person, email, text or voice
- Scope of Appointment
- Health Assessment (for Special Needs Plans only)

Medicare Supplement plans

- Application Signatures: Express Security Code, Electronic Touch and Remote
- Detailed quoting abilities (including discounts)
- Real-Time Underwriting

How to access JarvisEnroll



1

Log in to Jarvis

2

Under the “**Quick Access**” panel on the homepage, select:

JarvisEnroll (MA) for Medicare Advantage

JarvisEnroll (Med Supp-New) for Medicare Supplement

**Tip**

Help members download the UnitedHealthcare mobile app where they can track their application status and access their plan information. Eligible members can view their UnitedHealthcare UCard® or member ID, see available OTC credit and rewards balances, find shopping tools and more.



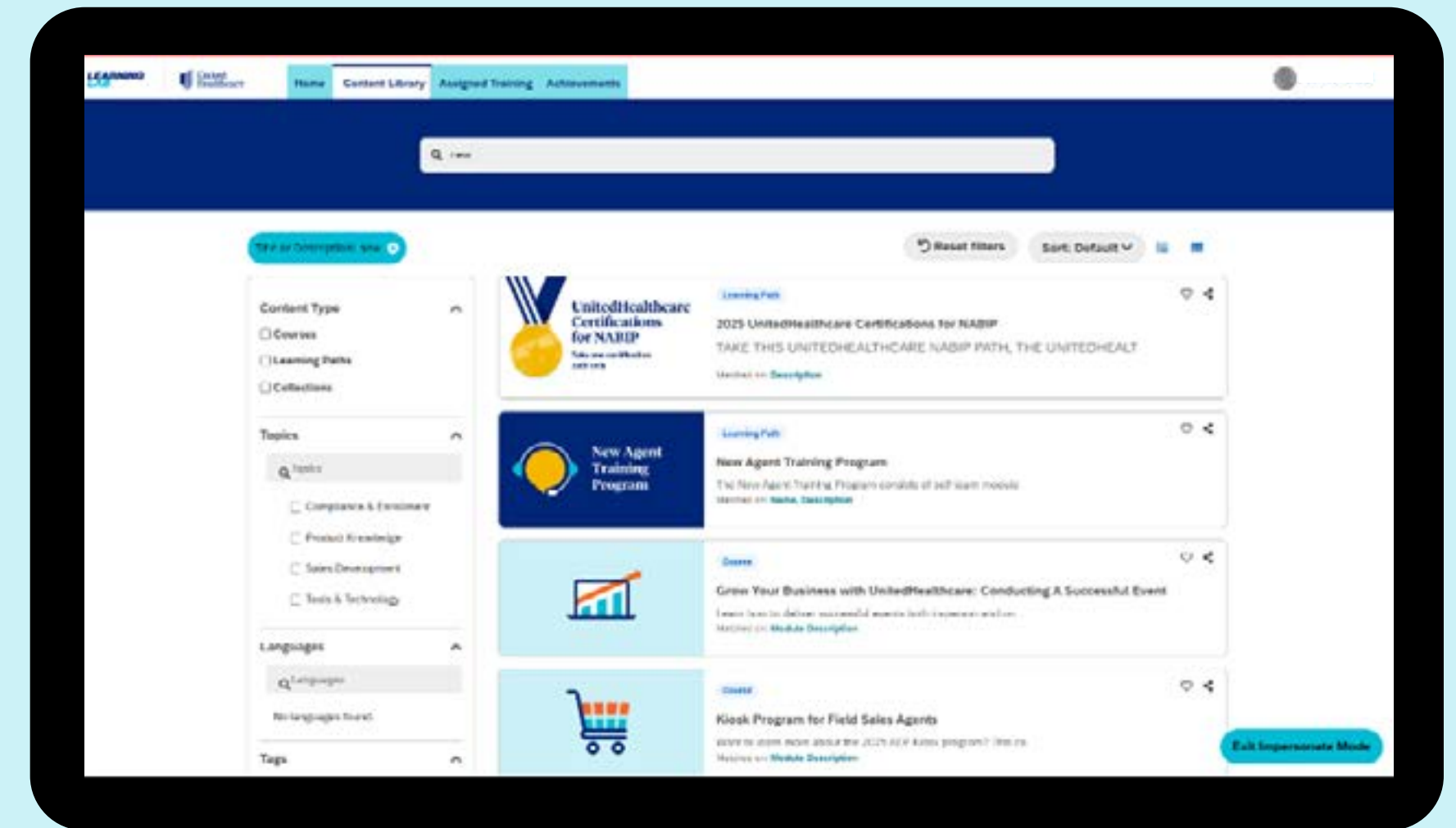


Complete your New Agent Training Program

The **New Agent Training Program** consists of self-study materials and national webinars with our knowledgeable trainers. This on-demand program, broken out into three phases, lets you learn at your own pace.

In **Learning Lab**, you can access the New Agent Training Program, additional training and certifications throughout your time with UnitedHealthcare.

How to access the program



1

Log in to Jarvis

2

Click **Knowledge Center** > **Ready to Sell** > **New Agent Resources** > **New Agent Training Program**





Join an upcoming training

Choose from a wide range of training opportunities designed to prepare you to sell with confidence and build strong product knowledge.

On the **National Webinar Schedule**, you can register for:

- New Agent Orientation
- Medicare Fundamentals
- JarvisEnroll, and more
- 60 Minutes to Success
- The Value of UnitedHealthcare

In Jarvis, click **Knowledge Center** > **Agent Training** > **National Webinar Schedule**

Or, explore the local training calendar for product-specific sessions designed for your market:

- Dual Special Needs Plans
- Medicare Supplement Deep Dive
- MA Ancillary Benefit Overview

In Jarvis, click **Knowledge Center** > **Agent Training** > **Local Training Schedule** or **Medicare Supplement Local Training**.





Resources to manage your business

Set yourself up for success with resources designed to help you plan strategically, grow your business, and stay connected in your community. Our **Business Plan Template** and **Grassroots Marketing Workbook** are designed to help you set your goals, generate leads, identify resources and opportunities, navigate roadblocks and maintain a strong presence in the community.

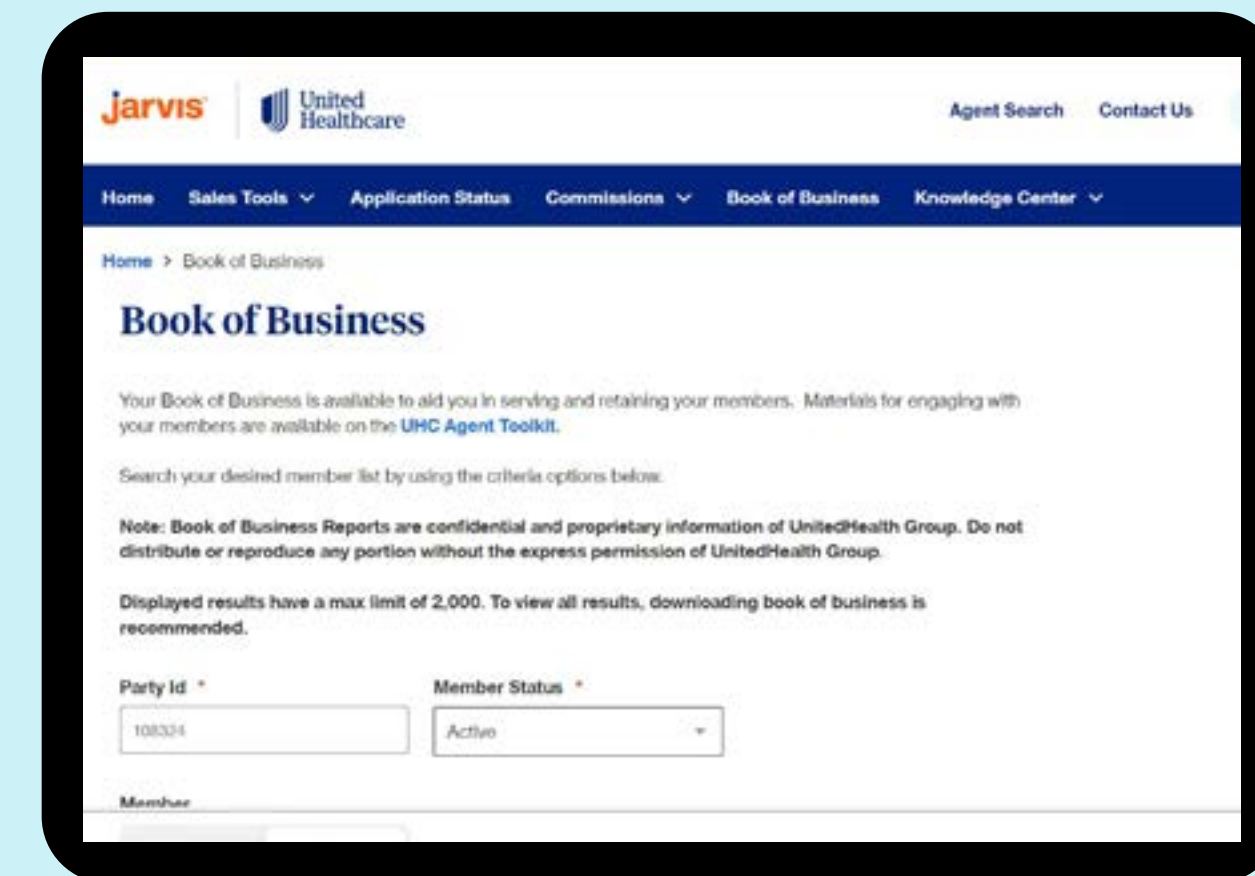
Take advantage of these materials in **Jarvis > Knowledge Center > Learning Lab > Grow Your Business with UnitedHealthcare: Grassroots Marketing** (search keyword “grassroots” in the Content Library).

While you’re in Jarvis, check out an upcoming National Webinar to help you grow your business:

- Find and Engage Consumers
- Grassroots Marketing
- Navigating the Sales Conversation
- Member Retention

How to access your Book of Business

The Book of Business tool in Jarvis gives you access to your client information, with tools to filter, customize your view, download reports and take action directly from the member profile.



1

Log in to Jarvis

2

Click **Book of Business**




Ready, set, AEP

Your path to success starts here

Whether you're navigating your very first Annual Enrollment Period (AEP) or bringing your experience to UnitedHealthcare®, we've got you covered, with support, resources and training.

Each year, AEP occurs from October 15 to December 7, providing an ideal opportunity to connect with consumers looking to enroll in or modify their Medicare coverage.

As you check in with existing clients or connect with new ones, AEP is a great time to:



Perform plan reviews with current clients to help determine if their plan is still meeting their healthcare needs



Assist new or current clients with enrollment in or changing their Medicare Advantage or Prescription Drug plans



Check-in with your Medicare Supplement clients. If they're satisfied, no annual re-enrollment is required. You can assist clients with Medicare Supplement plan enrollments during AEP or any time of year.*



Get prepared with the resources you need by visiting the AEP Resource page on Jarvis to find:

- Medicare Product Portal
- Medicare Supplement Plans-at-a-Glance
- AEP Agent Playbook
- Quick Reference Guides
- And more!

Go to AEP Resource Page



*If your client is underwritten, they may not be eligible for the plan or they may pay a higher premium.

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Recognition and Rewards

Premier Producer

The **Premier Producer** program recognizes and rewards the top UnitedHealthcare Medicare sales agents who meet specific eligibility criteria with a premium experience.

Premier Producers earn:

- Priority access to the Producer Help Desk
- UHC Agent Toolkit credit
- Fast Track certification access
- A myuhcagent.com web page
- Free business cards
- Medicare Supplement Cash Rewards
- Additional benefits for higher statuses

For more information about the Premier Producer program, go to **Jarvis > Knowledge Center > Ready to Sell > Premier Producer**.





The Producer Help Desk is ready to help

When you can't find the answer or need additional support, look to the Producer Help Desk (PHD). The PHD is a team of sales support professionals who are up to date on the latest Medicare-related information and happenings around UnitedHealthcare, including:



Contracting – status updates, up-line identification, state appointments and licensing



Pre-Enrollment – application status checks and updates to pending applications



Certifications – required courses, troubleshooting, software compatibility questions and transferring AHIP or NABIP credit



Product Information – information related to coverage



Commissions – inquiries related to statements, status of payment, agent of record, true-ups and renewals



Medicare/Medicaid Verification – confirm Part A/B, Medicare Beneficiary Identifier (MBI) and/or Dual Special Needs Plan eligibility



Two easy ways to connect:



English: 1-888-381-8581
Español: Presione la opcion 2



Live Chat via Jarvis





Prepare for your first client meeting

All that preparation through available materials and trainings, leads up to the sale!

Additional tips for a successful enrollment:



Get acquainted and build rapport with your client



Be thorough in your needs assessment, including reviewing and confirming plan type, network providers and drug coverage, if applicable



Set cost expectations and review key details about premiums, copays and drug costs



Explain the full value of the plan, including any additional benefits or wellness extras

Please note, for Medicare Advantage and Prescription Drug Plans, a **Scope of Appointment (SOA)** must be completed before any personal marketing appointment.* Please refer to the **Agent Guide** for additional information on SOA requirements.

Check out the **Closing the Sale** course in **Learning Lab** and the **Navigating the Sales Conversation** training on **National Webinar** for more helpful insights.



Tip

Make your first client meeting count – then keep the momentum going. Stay in touch year-round, thank clients for their business, be available for questions and encourage referrals to help grow your business!

*For plan discussions prior to Oct. 1, 2026, the SOA must be obtained at least 48 hours before the scheduled appointment, unless an exception applies.



Maximize earning potential

Whether this is a full-time career, part-time job or extra source of income, UnitedHealthcare is here to provide the support you need to reach your goals.

As a Medicare sales agent, you'll have the opportunity to earn commission for eligible, new Medicare Advantage (MA) enrollments, as well as when MA members re-enroll with UnitedHealthcare, subject to eligibility requirements.

For AARP Medicare Supplement Plans, you can choose how you're paid. Receive new and renewal commissions either monthly, as they are earned, or in advance.

How to access commission statements

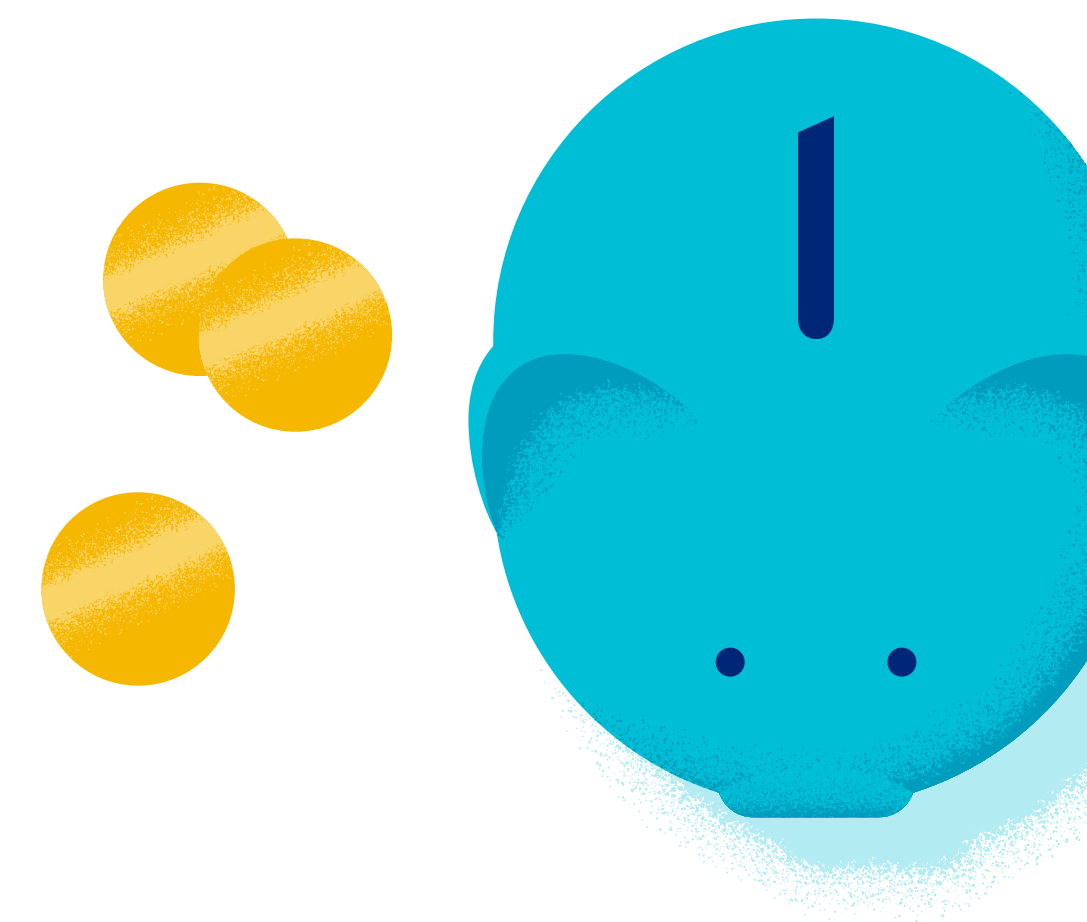
Enabling direct deposit will speed up your commission payments. You can do so by logging in to **Jarvis**, clicking your username, selecting "**Manage Profile**" and entering your direct deposit information.

1

Log in to Jarvis

2

Click **Commissions > Statements and More**





New agent checklist

You've read the guide and taken action along the way. Now, let's pull it all together. Use this simple checklist to confirm you've completed each step and to stay on track as you keep moving forward:

☐ **Log in to Jarvis** and familiarize yourself with key features and tools, including:

- **Medicare & Medicaid Eligibility Tool**
- **JarvisEnroll**
- **Book of Business Tool**
- **Knowledge Center**
- **Application Status**

☐ **Enable direct deposit** by clicking your username in the upper right-hand corner of Jarvis and selecting "**Manage Profile**"

☐ **Register for National Webinars**, such as "New Agent Orientation," or Local Trainings tailored to your market

☐ **Visit Learning Lab** to start taking on-demand trainings and view helpful resources

☐ **Browse the Medicare Product Portal** to learn about plans in your market and see your local UnitedHealthcare leadership

☐ **Visit the Sales Materials Portal** to order sales materials

☐ **Go to the UHC Agent Toolkit** to order personalized marketing materials like business cards, banners, postcards and flyers

☐ **View the Agent Support page** to learn how to contact the Producer Help Desk





Let's grow your business together

As you begin your career as a UnitedHealthcare Medicare sales agent, keep this guide as reference and a reminder of all the tools and support you have at your disposal.

- Find your local UnitedHealthcare growth leader on the **Medicare Product Portal**
- Get ready to sell, expand your product knowledge and develop your sales skills with the **New Agent Training Program**
- Browse **Jarvis** to start finding resources to help you on your sales journey

Welcome to the team.

