

# Agent Certification Checklist



## Prepare

- ☐ Review 2026 Certification Path comparison table and Certification Decision Tree  
*Jarvis > Knowledge Center > Ready to Sell > Certification Overview*
- ☐ Read and Review 2026 Certification Study Guide located in Learning Lab  
*Jarvis > Knowledge Center > Learning Lab > 2026 Certification Study Guide (tab at the top)*
- ☐ Attend a UnitedHealthcare Certification Readiness National Webinar  
*Register in Jarvis > Knowledge Center > Agent Training > National Webinars*



## Complete

In Learning Lab, complete the following:

- ☐ Review 2026 Certification What's New
- ☐ Agree to the Pledge of Compliance
- ☐ Complete Base Level Certification – successfully passing all 3 base level assessments authorizes an agent to sell Medicare Advantage (non-SNP), Prescription Drug Plans (PDP), Medicare Supplement Insurance Plans, and Standalone Dental, Vision and Hearing Plans:
  - ☐ Medicare Basics Assessment
  - ☐ Ethics and Compliance Assessment
  - ☐ AARP Assessment
- ☐ Complete Next Level Certifications and/or modules (if applicable):
  - ☐ Dual Eligible and Chronic Condition Special Needs Plans Assessment (D-SNP/C-SNP)
  - ☐ Complete the Events Basics module (no assessment)
  - ☐ Institutional and Institutional-Equivalent Special Needs Plans (I-SNP/IE-SNP) (available by invitation only)
  - ☐ Massachusetts Senior Care Options and Massachusetts One Care (available by invitation only 09/01/25)

## Next Steps



- ☐ Become familiar with UnitedHealthcare products and portfolio  
*Jarvis > Quick Access > Medicare Product Portal*  
*Jarvis > Quick Access > Find a Plan*  
*Jarvis > Knowledge Center > Medicare Product Resources*
- ☐ Review your Agent Guide  
*Jarvis > Knowledge Center > Reference Guides > Agent Guide*
- ☐ Attend National Webinars and local product trainings to expand your knowledge and selling opportunities  
*Register in Jarvis > Knowledge Center > Agent Training > National Webinars*