



UnitedHealthcare Sales Material Portal User Guide

Welcome to the New UnitedHealthcare Sales Materials Portal. This guide will help you locate, download and place orders for sales materials.

If you have questions that are not answered by this guide, please contact the Producer Help Desk (PHD):

phd@uhc.com

888-381-8581

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UnitedHealthcare Sales Materials Portal – Jarvis login

Log on to Jarvis (www.uhcjarvis.com) using your Optum ID or Unix ID.

To view, order, or download materials, hover over the **Sales & Marketing Tools** tab, then, under Sales Materials, click **Sales Materials Portal** (shown below).

The screenshot shows the Jarvis website interface. At the top left, there are logos for Jarvis and UnitedHealthcare Medicare Solutions. On the top right, there is a "Welcome," message and links for "Agent Search", "Contact Us", and "Sign Out". Below this is a blue navigation bar with tabs for "Home", "Sales & Marketing Tools", "Enrollment", "Commissions", and "Knowledge Center". A search bar labeled "Search Jarvis" is also present. The "Sales & Marketing Tools" dropdown menu is open, showing three main sections: "Plan Search", "Sales Materials", and "Authorized to Offer". Under "Sales Materials", there are three links: "Sales Materials Portal" (highlighted with a red arrow), "UnitedHealthcare Toolkit", and "Promotional Items". Below the dropdown, there are three columns of text providing more details about each section. A "Back To Top" button is located at the bottom right of the page.

Logging In

After selecting **Sales Material Portal** in Jarvis, either the **Sub Account Login List** or the **Agent Ordering Portal Catalog** screen.

If your account does not contain sub accounts (most do not), the Catalog screen will open first.

Larger agencies with multiple agents simultaneously logging in may have multiple Sub Accounts. Select either the **Parent Account** or one of the **Sub Accounts** to open the **Agent Ordering Portal Catalog** screen.

First name	Last name	Login Principal	Email Address	Actions
BP	COZ	bcosgro_1	bpcoz@aol.com	Login

The Catalog Screen - Ordering Materials

This menu provides filter options to search for materials in the Sales Materials Portal. Note that selecting **Catalog** will only return materials for which agent or agency is licensed, appointed, and certified to sell.

Up to three custom message boxes may be visible upon opening the catalog screen.

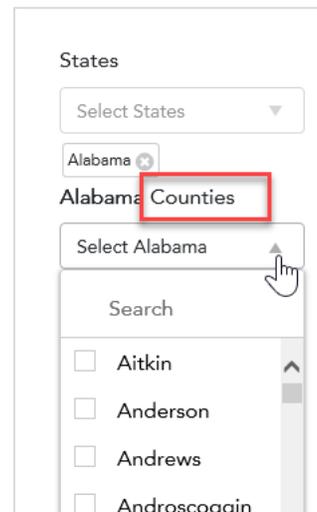
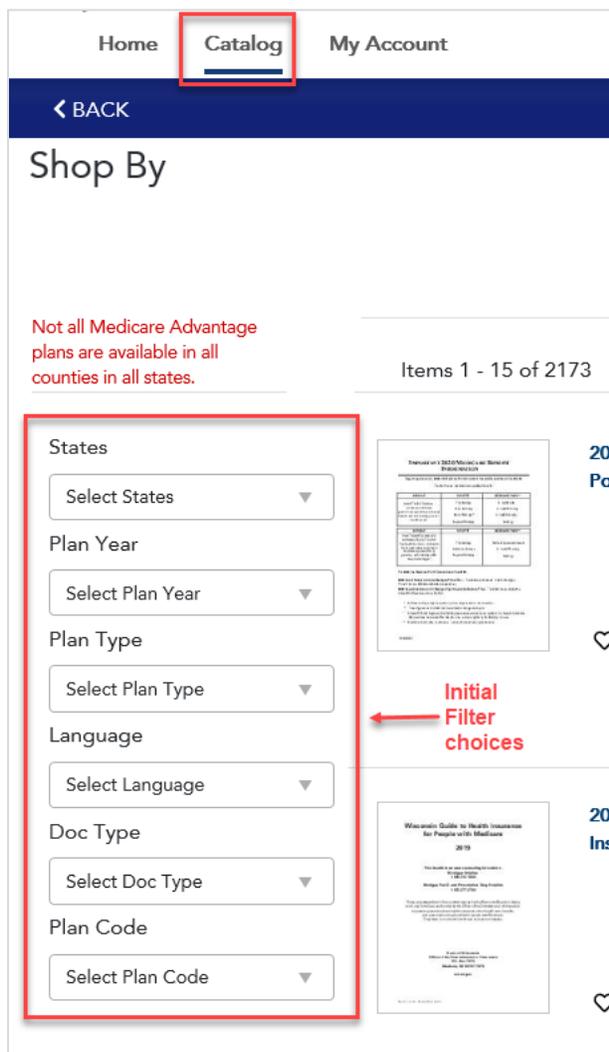
The screenshot shows the UnitedHealthcare Catalog interface. At the top, there is a navigation bar with the UnitedHealthcare logo, a search bar, and user information (User Guide, My Cart, Brian Cosgrove). Below the navigation bar, there are tabs for Home, Catalog (highlighted with a red box), and My Account. A search bar is located to the right of the tabs. Below the search bar, there is a blue header with a back arrow and the text "Shop By". Under "Shop By", there are three red-bordered boxes: the first is empty, the second is empty, and the third contains the text "Up to three informational message boxes may be visible". Below these boxes, there is a red text box stating "Not all Medicare Advantage plans are available in all counties in all states." To the right of this text, it says "Items 1 - 15 of 16502". Further right, there is a view selector showing "View : 15 | 30 | 60" and a list view icon (three horizontal lines) which is highlighted with a red box. Below the view selector, there are filter options for "States" and "Plan Year", each with a dropdown menu. To the right of the filters, there are three product cards: "2019 Choosing A Medigap Policy - SPANISH Version", "2020 Arabic Alternative Covered Drugs", and "2020 Arabic Benefit Highlights- UnitedHealthcare Dual Complete HMO...".

Results can also be viewed as a list by selecting **List View**:

The screenshot shows the UnitedHealthcare Catalog interface with results in list view. At the top, there is a view selector showing "View : 15 | 30 | 60" and a list view icon (three horizontal lines) which is highlighted with a red box. Below the view selector, it says "Items 1 - 15 of 16502". Below this, there are two product cards in list view: "2019 Choosing A Medigap Policy - SPANISH Version" and "2020 Arabic Alternative Covered Drugs". Each card has a thumbnail image, a title, and two icons: a heart icon and a download icon.

Selecting any one filter (Plan Years, Language, etc.) will immediately return the results for that filter.

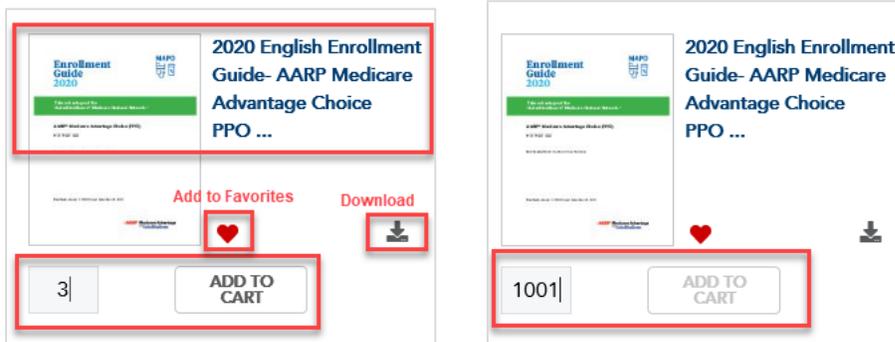
Selecting a state will automatically produce a list of counties for that state.



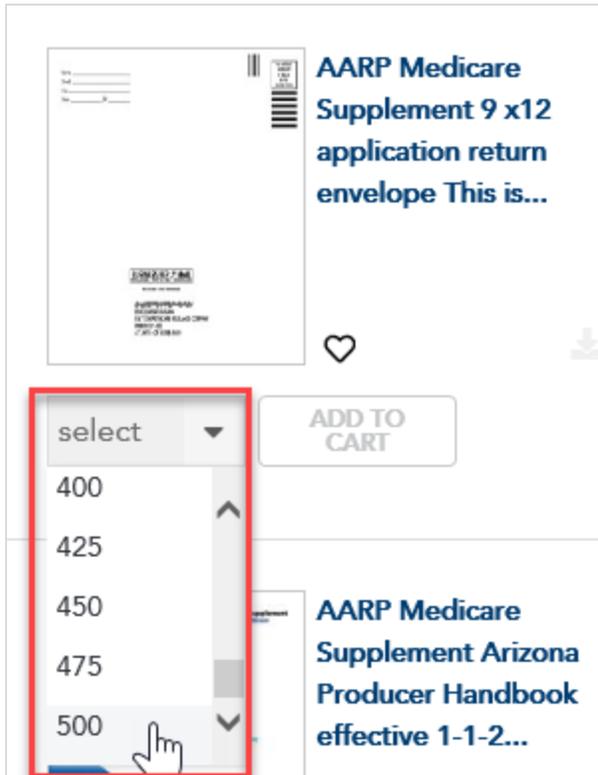
From either the **Grid** or **List View**, click on an item name or thumbnail to go to the **Details Screen**, where you'll see thumbnails of all pages, **Additional Information**, the option to add as a **Favorite**, or the option to **Download**, if available.

- Selecting the empty heart shape will identify that item as a Favorite
- Selecting **Download** will open a PDF version of the document
- Populating the box with a '0' in it will allow you to **ADD TO CART**

If you request a quantity in excess of your limit for your role, **ADD TO CART** will remain grayed out.



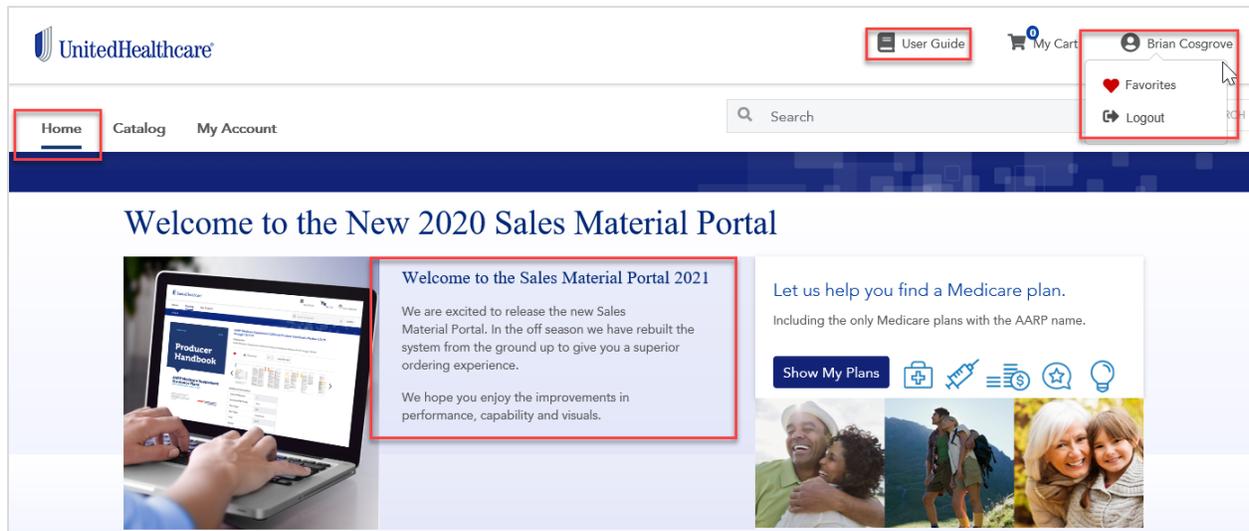
Starting with Plan Year 2021, all **Kits/Enrollment Guides** will be orderable in increments of 5, 25, or 50. For all items that are only orderable in these increment sizes, a drop-down will appear that will only allow increments up to your role limit for that item. After selecting one, you may **ADD TO CART**.



Home Screen

At any time, you may click on and view the **Home** screen. The **Home** screen includes any current announcements.

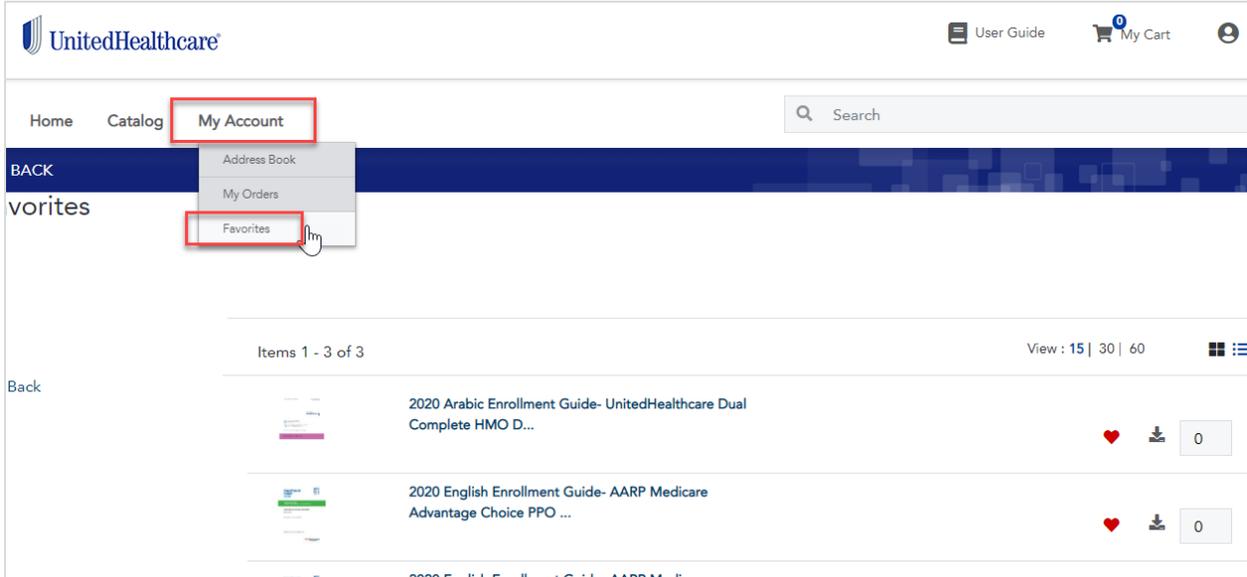
In addition, the **Home screen** includes shortcuts to the portal **User Guide**, a shortcut to **My Cart** (for any pending orders), as well as shortcuts in a dropdown under your account name for quick access to **Favorites** or to sign out.



The screenshot displays the UnitedHealthcare Home Screen. At the top left is the UnitedHealthcare logo. To the right are links for 'User Guide', 'My Cart', and the user name 'Brian Cosgrove'. Below the logo are navigation tabs for 'Home', 'Catalog', and 'My Account'. A search bar is located to the right of the navigation tabs. The main content area features a large heading: 'Welcome to the New 2020 Sales Material Portal'. Below this heading are three main sections: 1) An image of a person using a laptop with a 'Producer Handbook' overlay. 2) A text box titled 'Welcome to the Sales Material Portal 2021' with a message about the new system and improvements. 3) A section titled 'Let us help you find a Medicare plan.' with a 'Show My Plans' button and icons for various services. The bottom of the page shows three small images of people: a man and woman, a person hiking, and an elderly couple.

Favorites

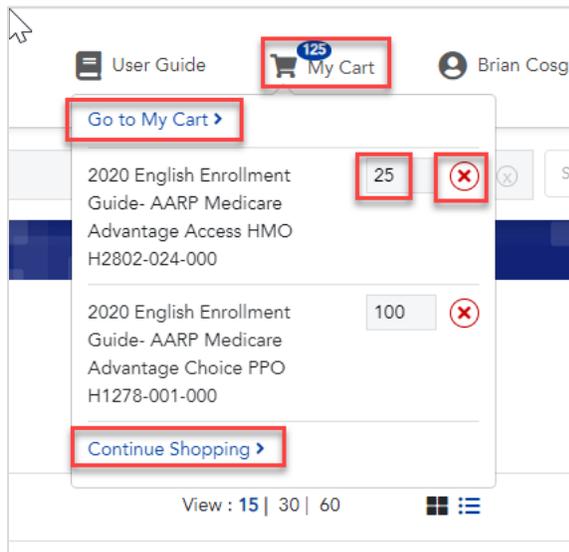
To view all items you have identified as favorites, click on [My Account](#), and then the [Favorites](#) option. All **Favorite** items are listed.



My Cart

After placing materials you wish to order in your Cart, click on **My Cart** to:

- Glance at items and quantities you have ordered
- Change any quantities you wish to change
- Press X to delete items
- **Continue Shopping**, or
- **Go to My Cart**



Go to My Cart

From **My Cart**, options are:

- Select an item to remove, then click **REMOVE SELECTED**
- Change a quantity, then click refresh to finalize the change
- After complete review, check **I have confirmed my order...** selection, and then **PROCEED TO CHECKOUT** (**CONTINUE SHOPPING** is also an option, but would rarely be a choice)

The screenshot shows a 'Shopping Cart' page with a single item. The item name is '2020 English Enrollment Guide- AARP Medicare Advantage Access HMO H2802-024-000' with SKU 'AAIL20HM4529224_001_AEP_MA-2020'. The quantity is set to 15. A red arrow labeled 'Select to Remove' points from a checkbox next to the item name to a 'REMOVE SELECTED' button. Another red arrow points from the quantity input field to a refresh icon, with a callout box stating 'Must click refresh when updating quantities or personalization information.' Below the item, there is a checkbox for 'I have confirmed my order totals and understand that I cannot change my order after I check out'. At the bottom right, there are two buttons: 'PROCEED TO CHECKOUT' and 'CONTINUE SHOPPING'.

Confirm Order

From the Confirm Order screen, you may:

- Select your default shipping address
- Add a new address
- Review all addresses in your [Address Book](#)

Confirm Order

Shipping Address Order Date
07-15-2020

There is currently no address selected. Please select one of the addresses below or add as your shipping address.

Shipping Address

Select Shipping Address

Add Address Address Book

Products	Quantity
Name: 2020 English Enrollment Guide- AARP Medicare Advantage Access HMO H2802-024-000 SKU: AAL20HM4529224_001_AEP_MA-2020	15

BACK COMPLETE ORDER

Address Verification

To ensure that placed orders arrive to their destination, the Sales Materials Portal will verify any new addresses that is added. If an address is incorrect, the correct address will be suggested. You should select the [USE ADDRESS](#) option for the corrected address.

Address Verification

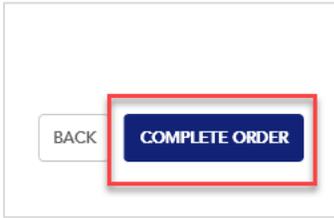
The address provided is NOT a valid address per the US Postal Service database. Address needs to be corrected or select

Address Entered	Revised Address
Mongo Bullrider 1531 oakwood tarrace, shoreview, Minnesota, 55126 United States T: (612)-327-0642	Mongo Bullrider 1531 Oakwood Ter, Shoreview, Minnesota, 55126-8537 United States T: (612)-327-0642

EDIT USE ADDRESS USE ADDRESS

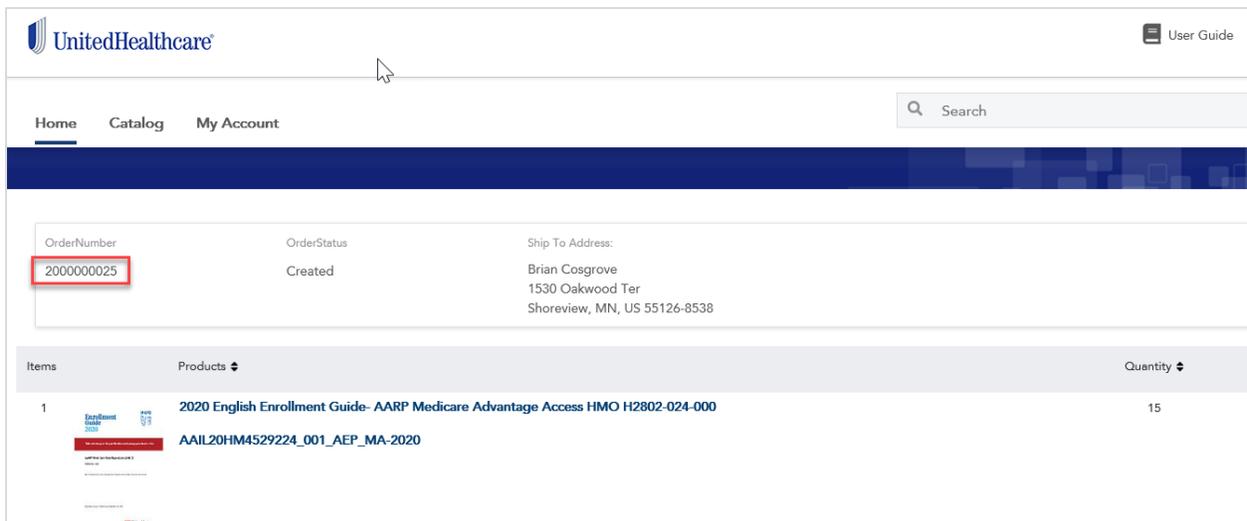
Address 2 (optional)

Once address is selected, select **COMPLETE ORDER**



Order Confirmation Screen

Once you click the **COMPLETE ORDER** button, an **Order Confirmation Screen** will appear. The screen will show you your **order number** and **order information**. Each step of the order process will generate a status update email, letting you know the status of each order.



The screenshot shows the UnitedHealthcare website's Order Confirmation screen. At the top left is the UnitedHealthcare logo, and at the top right is a 'User Guide' link. Below the logo are navigation links for 'Home', 'Catalog', and 'My Account', along with a search bar. The main content area displays the following information:

OrderNumber	OrderStatus	Ship To Address:
2000000025	Created	Brian Cosgrove 1530 Oakwood Ter Shoreview, MN, US 55126-8538

Below this information is a table of order items:

Items	Products	Quantity
1	2020 English Enrollment Guide- AARP Medicare Advantage Access HMO H2802-024-000 AAIL20HM4529224_001_AEP_MA-2020	15

My Orders

All orders can be viewed by selecting the **My Account** dropdown, then **My Orders**.

The screenshot shows the UnitedHealthcare website interface. At the top, there is a navigation bar with 'Home', 'Catalog', and 'My Account' (highlighted with a red box). Below 'My Account', a dropdown menu is open, showing 'Address Book', 'My Orders' (highlighted with a red box and a mouse cursor), and 'Favorites'. A search bar is visible to the right of the navigation bar. Below the navigation bar, there is a section for 'Orders' with filters for 'Order Number' and 'Order Status'. A table of orders is displayed below the filters, with columns for 'Order #', 'Qty', 'Order Date', 'User First Name', 'User Last Name', 'Order Status', and 'View Order'. The first row shows an order with ID 2000000025, quantity 15, date 07/16/2020, user Brian Cosgrove, and status 'Processing'. The 'View Order' link for this order is highlighted with a red box. Below the table, there is a pagination control showing 'Page: 1 of 1 pages' and 'View: 10 per page | Total 1 records found'.

Clicking anywhere on the order row will bring up order details, including **Tracking Information** when it becomes available.

The screenshot shows the 'Order Summary' page for order 2000000025. The page is divided into several sections: 'Order Summary' (Order Date: Jul 16, 2020, 12:40:02 AM; Order Status: processing), 'Account Information' (Customer Name: Brian Cosgrove; Email: bcosgro1@shutterfly.com), 'Shipping Address' (Customer Name: Brian Cosgrove; Address: 1530 Oakwood Ter, Shoreview, MN 55126-8538; Tel: 6123270642), and 'Items Ordered'. The 'Items Ordered' section shows a table with columns for 'Product', 'Personalization', 'Tracking Information' (highlighted with a red box), and 'Total Priced'. The first row shows the product '2020 English Enrollment Guide- AARP Medicare Advantage Access HMO H2802-024-000' with SKU 'AAIL20HM4529224_001_AEP_MA-2020' and a total price of 15.

Medicare Supplement Enrollment Kits

Only Medicare Supplement materials can be personalized. This feature enables you to personalize your kits by selecting from multiple fields. Only Agent ID is required.

Simply select **PERSONALIZE** and populate the fields you wish to personalize.

The screenshot shows the UnitedHealthcare website's shopping cart. At the top, there is a navigation bar with the UnitedHealthcare logo, 'User Guide', and 'My Cart' links. Below this is a secondary navigation bar with 'Home', 'Catalog', and 'My Account' links, along with a search bar. A dark blue bar with a 'BACK' arrow is positioned below the navigation. The main content area is titled 'Shopping Cart' and contains a list of items. The first item is 'Alabama Enrollment Kit - 2020 Effective Dates including 2020 Rates' with SKU '2020-AARP-EU-KAL01_AEP_MS-2020'. A 'PERSONALIZE' button is highlighted with a red box. Below the item, there is a form for 'Agent 1' with fields for 'First Name', 'Middle Initial', 'Last Name', 'Phone Number', 'Email Address', and 'Agent ID*'. The 'Agent ID*' field is highlighted with a red box.

Downloading PDFs

The Download button indicates an item is downloadable. Click the button and the document will either become available to view or viewable, depending upon the browser you are using.

