

SALES MATERIALS PORTAL

QUICK START GUIDE

The screenshot shows the Jarvis UnitedHealthcare Medicare Solutions website. The top navigation bar includes links for Home, Sales & Marketing Tools, Enrollment, Commissions, Knowledge Center, and a search bar labeled 'Search Jarvis'. Below the navigation bar, there are three main sections: 'Plan Search', 'Sales Materials', and 'Authorized to Offer'. The 'Sales Materials' section contains three links: 'Sales Materials Portal', 'UnitedHealthcare Toolkit', and 'Promotional Items'. A red arrow points to the 'Sales Materials Portal' link. Below the navigation bar, there are three columns of text providing information about the Sales Materials Portal, the UnitedHealthcare Toolkit, and the Authorized to Offer program.

How to Find the Sales Materials Portal

Log in to UHC Jarvis:

www.uhcjarvis.com

- Click on the [Sales & Marketing Tools](#) tab
- Click on the [Sales Materials Portal](#) link on the Sales Materials page
- Click on [Order Materials](#) to find materials (there is also a search field)

Note: Any recently ordered items would appear as thumbprints below the "Welcome" message on this page.

The screenshot shows the UnitedHealthcare website. The top navigation bar includes links for Home, Order Materials, and My Account. The 'Order Materials' link is highlighted with a red circle. Below the navigation bar, there is a banner for the UnitedHealthcare Sales Materials Portal. The banner includes the UnitedHealthcare logo and the text: 'We are off and running! Welcome to AEP 2018! The Sales Materials Portal is open and available for you to place orders for 2018 Enrollment Materials. When placing orders, please ensure that you have your correct name, address, suite or apartment number (if applicable), city, state, and zip code to ensure on time delivery of your order.' The banner also features a photograph of a woman and an older man sitting at a table.

Finding Materials Using the Products Menu

Shop By
Not all Medicare Advantage plans are available in all counties in all states.

Multi Filter Search

States
 -- Select Option -- ▾

Plan Years
 -- Select Option -- ▾

Plan Type
 -- Select Option -- ▾

Language
 -- Select Option -- ▾

Doc Type
 -- Select Option -- ▾

Contract-PBP Code
 -- Select Option -- ▾

Search

Add To Favorites

The **Shop By** box lets you search for all materials within a plan year and line of business. Select from one or more drop down menus to narrow your search.

For example, let's look for a Prescription Drug Plan (PDP) Enrollment Guide.

- Select from the **Plan Years** field.
- Select from the **Plan Type** field.
- Select from in the **Doc Type** field.

Currently Shopping by:

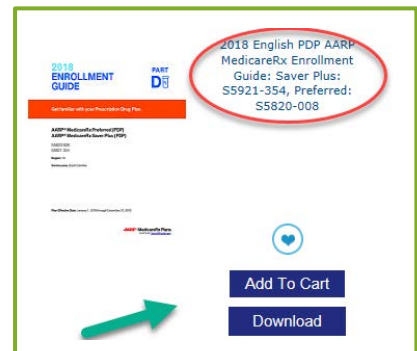
Plan Years: 2018 ✕

Plan Type: 2018 - PDP ✕

Doc Type: Enrollment Guide ✕

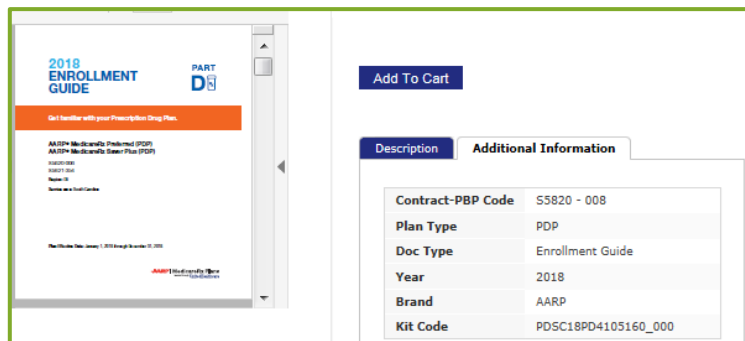
Items matching your criteria will appear. A brief description of the item is within each box.

- Clicking **Add To Cart** will add the item to your shopping cart. (Some items are available as a download only.)
- Clicking **Download** will open the document. (Not all documents are available for download.)



- Clicking the document title will take you to a more detailed description as shown below.

Note: Only states in which you are licensed will appear in the States drop down list.



Finding Materials Using the Search Field

Enrollment Guide	
Enrollment Guide	2488
enrollment guides	234
enrollment guide 2015	173
enrollment guide broward	2
enrollment guide Miami	1
enrollment guide san diego	528
enrollment guide, PPO indian river ounty	9
Enrollment Guide Part D	2
enrollment guide R5287 -001	242
Enrollment guide dual arizona	4
Enrollment Guide Oregon	24
Enrollment Guide Milwauee WI MAPD	37
enrollment guide los angeles	450
Enrollment Guide Milwauee WI	37

From the Home page or the Product page, type the name of a document in the search field. A list of all matches will open. Click on the closest match and a list of documents will open.

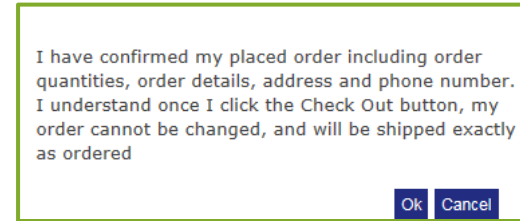
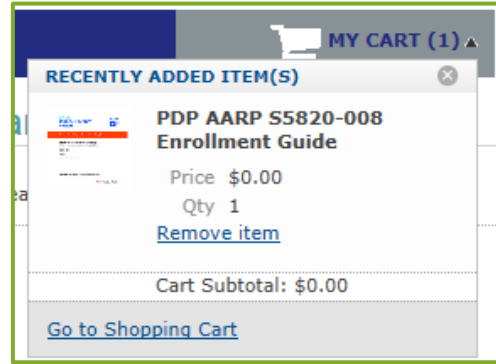
If you want to narrow your search, click on [Advanced Search](#) and complete the drop down fields for the search settings.

Search results will appear, showing the search criteria and the document results.

My Cart / Checkout

Review ordered items by clicking on [MY CART](#) in the top right corner.

- Click on [Go to Shopping Cart](#) to review your items.
- Review the [confirmation](#) and click Ok to show agreement.



- Review the items, quantities, shipping information, payment information (if applicable).
- Review the order one final time and click [PLACE ORDER](#).

Note: You may still edit your order prior to clicking PLACE ORDER.

SHIPPING INFORMATION

PAYMENT INFORMATION

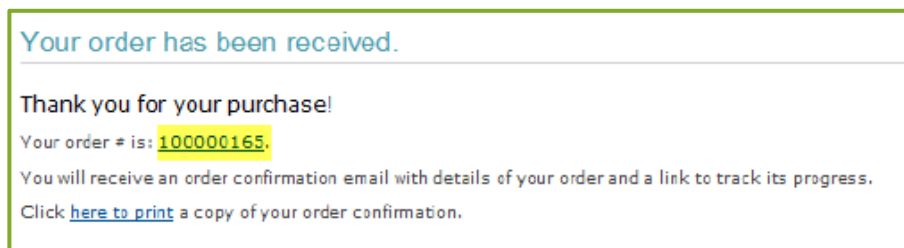
ORDER REVIEW

PRODUCT NAME	PRICE	QTY	SUBTOTAL
PDP AARP Kit	\$0.00	1	\$0.00
SNP UHC Community Plan H5253-024 Kit	\$0.00	1	\$0.00

Customer Order Comment

Forgot an Item? [Edit Your Cart](#) [PLACE ORDER](#)

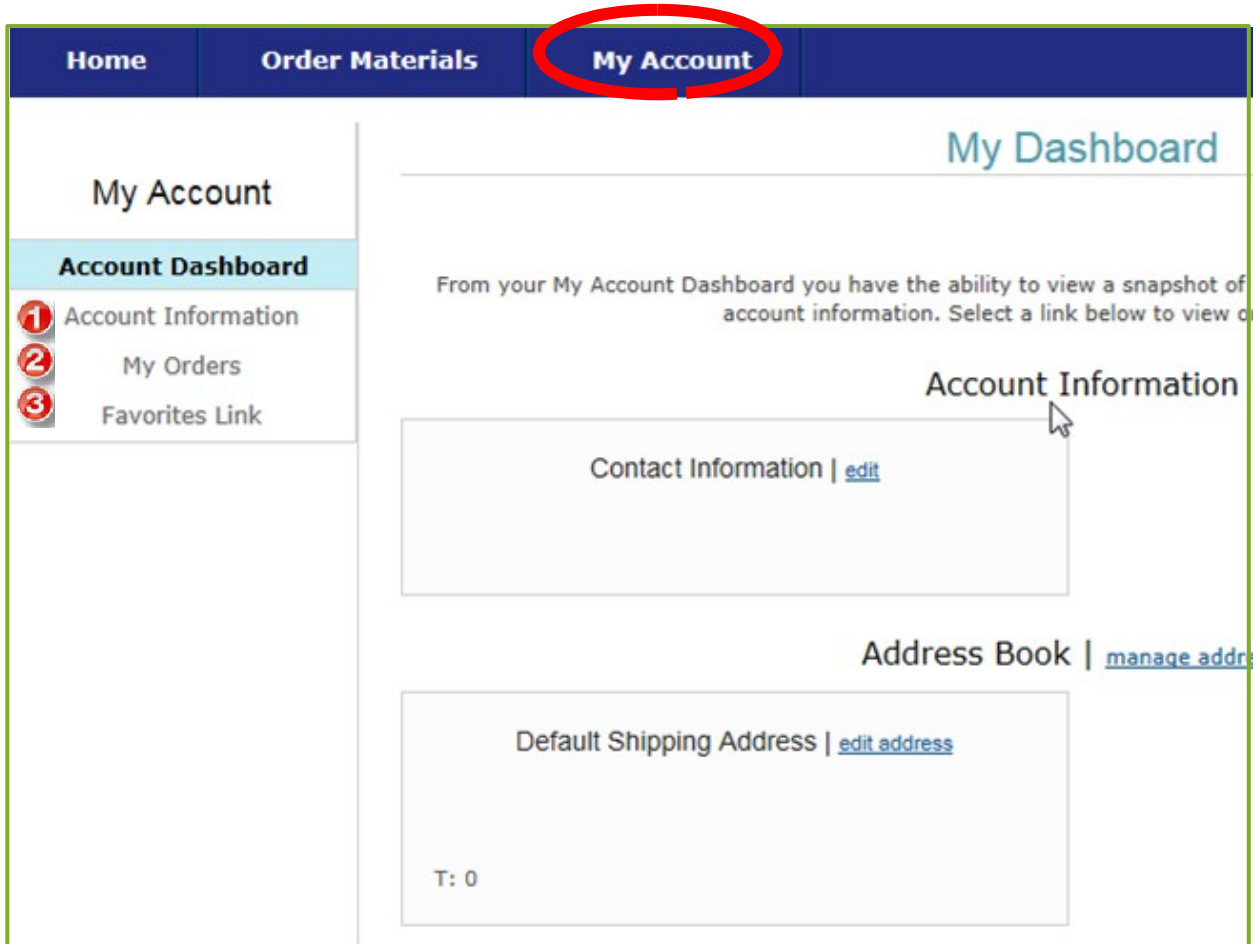
- Once you have placed your order, a confirmation screen will appear. You will be able to see your order number and are given a link to print a confirmation of the order. You will also receive status emails.



My Account

The My Account tab is where your account information is stored.

1. **Account Dashboard** will display your account information and default shipping address.
2. **Account Information** is where you can edit your account information or password.
3. **My Orders** provides a summary of all your orders: in process, on hold, completed, canceled, approved.



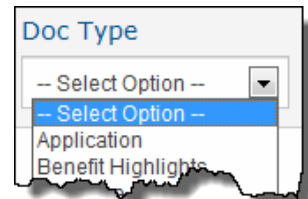


- Use the "UnitedHealthcare Agent Materials Portal Users Guide" found in the upper right corner of the site.

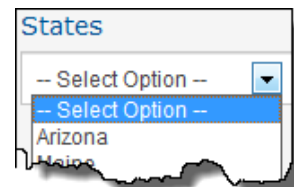


- When placing an order, you might see ordering messages that will tell you if you have exceeded the quantity limit for item ordered.
 - ⇒ If you need more than the established quantity limit, you can still place the order, but know that the order will be put on hold so that it can be reviewed by UnitedHealthcare Management.
 - ⇒ UnitedHealthcare will either approve your order as requested, modify the quantity ordered, or cancel the order in its entirety.

- When conducting searches, filter to the appropriate document type to limit the number of options that will be displayed.



- If you are licensed in multiple states, filter to the appropriate state to limit the number of options that will be displayed.



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

phd@uhc.com

(888) 381-8581