



## Feature update

### Updated 2024 sales and marketing requirements

The Centers for Medicare & Medicaid Services (CMS) issued new and updated Sales and Marketing requirements in April that are applicable to Medicare Advantage and Part D plans. We've communicated some of these new requirements in the past and wanted to provide you with a resource guide to help navigate these changes.

**Two important highlights include:**

**Scope of Appointment:** As you begin talking to consumers, please make sure you familiarize yourself with the Scope of Appointment 48-hour rule. CMS requires a minimum of 48 hours between completion of a Scope of Appointment (SOA) and the start of a scheduled personal marketing appointment with a few limited exceptions (e.g., walk-ins). Please check the resource guide for more details on this rule, including the nuances of when it does and does not apply.

**Use of Medicare cards in materials:** Starting Oct. 1, marketing materials that show the actual Medicare card visual are no longer CMS compliant, unless use of the card image has been authorized by CMS. An illustration of a Medicare card will still be allowed. To help you replace banners that currently have the Medicare card, you can order replacements at half price on the toolkit. Standard shipping will be free on these banners through Oct. 15.

[Learn more](#)

## Medicare Advantage news

### Real time access—helping members engage with their plan immediately!

After an enrollment application is completed, members often have questions about what's next—What's the status of my application? When will I receive my UnitedHealthcare UCard® and other important materials? And more.

To help members start engaging with their plan earlier, we're launching real-time access for member accounts immediately following submission of the enrollment application! Real time access is designed to help remove the guess work for members around what comes next during the enrollment process and build their confidence that they made the right choice with UnitedHealthcare. That means fewer calls to agents to check on an application and improved retention.

How does it work? Shortly after an enrollment application is submitted, members will receive a confirmation email from UnitedHealthcare. This email will notify them their application has been received, provide a link to download the UnitedHealthcare app on their mobile phone and set up their member account. As an agent, you can provide immediate value and help build trust by encouraging

members to sign up for digital access and download the UnitedHealthcare mobile app at enrollment to experience the value of their plan right away!

[Learn more](#)

## Medicaid news

### State Medicaid Redetermination update

Medicaid redetermination is the process through which states redetermine an individual's Medicaid eligibility. Medicaid recipients deemed ineligible will have their Medicaid benefits terminated.

The following state may terminate members' Medicaid benefits starting on October 1:

- Oregon

For state-specific information, please visit your state's department of health website.

You can learn more about redeterminations on the D-SNP section of the Jarvis Member Experience page.

[Member Experience](#)

## Training news

### Learn at your own pace

Did you know we offer many self-paced trainings? No matter where or when you need them, these eLearnings are available at your fingertips to help boost your knowledge on topics that matter. Check out one of the self-guided courses below to help ensure you are prepared as you head into AEP 2024! All eLearnings are found in *Jarvis* > Learning Lab > Content Library tab > search using a keyword below.

#### **Social Media: Increasing Your Presence**

Learn to follow and apply our social media policies to increase your presence in the community. This course was designed to help you generate leads through social media while staying compliant. Search keyword: social media.

#### **UCard Experience - Member Portal**

This interactive training will walk you through everything the member can experience in the Member UCard Portal. You will see two different simulations: the pre-effective member experience and the

member experience after plan effective date. This course can help you retain members by understanding the member experience with the Member Portal and UCard Hub. Search keyword: UCard.

### **Jarvis: Agent Overview and Navigation**

This module walks you through the navigation and functions of *Jarvis*. Through this course you will learn how to locate application status, marketing materials, selling resources and much more! Search keyword: *Jarvis*.

## **Learning Lab**

# **UnitedHealthcare Agent Toolkit resource of the week**

## **UnitedHealthcare Shopping Sheets and Benefit Highlight Brochures available**

Our 2024 Medicare Advantage products offer stability where it matters most. We're on a journey to differentiate beyond benefits and deliver a truly premium experience.

One way to heighten the experience when talking with consumers, is utilizing the Benefit Highlight Brochure or the Shopping Sheets. These materials allow you to compare up to 4 plans and associated benefits. They are now available on the UnitedHealthcare Agent Toolkit for customization.

Search by SPRJ number below or by keyword: *Shopping Sheets or Benefit Highlight Brochure*

- MA Shopping Sheets 24SPRJ63745
- D-SNP Shopping Sheets 24SPRJ63554
- MA Benefit Highlight Brochure 24SPRJ74962
- D-SNP Benefit Highlight Brochure 24SRPJ74697

Search by the SPRJ number above.

## **Clarity materials now available**

Get ready for your community meetings and 1:1 appointments with our redesigned Clarity materials. The following are available for immediate use. Download or order printed copies from the UHC Agent Toolkit.

- MA Clarity Presentation - 24SPRJ81168
- MA English Clarity Guide - 24SPRJ81163
- MA Spanish Clarity Guide - 24SPRJ81164
- D-SNP Clarity Presentation - 24SPRJ81052
- D-SNP English Clarity Guide - 24SPRJ81046
- D-SNP Spanish Clarity Guide - 24SPRJ81048

\*MA and D-SNP Clarity Guides are also available in Chinese, Korean, and Vietnamese. Clarity videos will be available soon!

Search by SPRJ number above or by keyword: *PY24 Clarity*

## New to Medicare materials

There are materials available on the UHC Agent Toolkit that can help you prepare for conversations with consumers who may be new to Medicare and provide prospects with valuable Medicare information. Take advantage of the “customize” step to help you set the right tone.

Search keywords: New to Medicare

[UnitedHealthcare Agent Toolkit](#)

## Medicare Supplement news

### Health Assessment

The Health Assessment is available for members enrolled in an AARP® Medicare Supplement Insurance Plan from UnitedHealthcare®.

[Learn more](#)

## Special Election Period news

### Special Election Period may be available to members affected by severe weather

The Federal Emergency Management Agency (FEMA) may have declared a weather-related emergency or major disaster in your state. Medicare beneficiaries affected may be eligible for a Special Election Period (SEP).

**For affected areas and SEP dates, please visit *Jarvis*.** For marketing materials that comply with CMS marketing requirements, please visit the UnitedHealthcare Agent Toolkit.

[Read more](#)