

I want to sell or conduct:

I must pass these assessments:

Base Level

Medicare Advantage Plans non-SNP (MA non-SNP)

UnitedHealthcare, AARP, Erickson, Peoples Health, Preferred Care Partners, Preferred Care Networks, or Rocky Mountain Healthcare branded HMO, POS, PPO and PFFS plans

AARP Prescription Drug Plans (PDP)

AARP Medicare Supplement Plans

Successfully pass all 3 Base Level assessments:

- Medicare Basics* (or transfer AHIP passing score)
- Ethics & Compliance
- AARP

**Medicare Basics includes credit for Medicare Advantage Plans (non-SNP), Prescription Drug Plans and Medicare Supplement Insurance Plans*

Next Level

Dual Special Needs Plans and/or Chronic Condition (D-SNP/C-SNP)

UnitedHealthcare, Preferred Care Networks, Preferred Care Partners, and Erickson

Events Basics

To conduct marketing/sales events, host a retail kiosk, or conduct a community meeting

Institutional and Institutional-Equivalent Special Needs Plans (I-SNP/IE-SNP)

Senior Care Options UnitedHealthcare

Successfully pass all Base Level assessments **AND** Dual Special Needs Plans and Chronic Condition (D-SNP/C-SNP) assessment

Successfully pass all Base Level assessments **AND** the Events Basics assessment

Successfully pass all Base Level assessments **AND** Institutional and Institutional-Equivalent Special Needs Plans (I-SNP/IE-SNP) assessment (available by invitation only)

Successfully pass all Base Level assessments **AND** Senior Care Options assessment (available by invitation only)

All agents must first agree to the Pledge of Compliance and complete the Conflict of Interest attestation before taking any assessments.