Agent Quick Reference Guide

Contracting



Contracting establishes or changes how a producer is eligible to sell UnitedHealthcare products. Contracting is initiated through an evite (invitation) and must be reviewed and approved before any onboarding, hierarchy change, or transfer can take effect.

Contracting requirements and timing vary by sales channel. All contracting must meet eligibility and policy requirements and does not guarantee approval or completion.

Frequently Asked Questions:

When is contracting required?	Contracting is required throughout a producer's lifecycle, including when a producer first onboards (including adding an additional sales channel), transfers to a new upline or sales channel, or changes their hierarchy.
Who starts a contracting evite?	Evites are started by uplines, recruiters, or UnitedHealthcare.
How will I receive my evite?	Evites are emailed to the address provided to the recruiter, upline, or UnitedHealthcare. The email is sent from uhc_contracting@sircon.com and contains a secure link that directs you to your sircon.com account to complete the contracting steps.
What if I can't locate my evite?	Go to your sircon.com account and check your contracting To Dos.
What steps do I need to take to complete an evite?	After receiving an evite, sign in to your sircon.com account using the secure link and complete all required steps, including submitting any requested information or documents.
Do I need a sircon.com account to complete contracting?	Yes. Contracting is completed through your sircon.com account only. If you do not already have an account, you will be prompted to create one.
Will I be asked for additional information after I complete the evite?	In some cases, UnitedHealthcare may request additional information after the initial evite is completed as part of the review and approval process.
Does completing an onboard evite mean I'm eligible to sell?	No. You are not eligible to sell until sales channel contracting requirements are satisfied, your contracting is approved, and all required steps are completed. You can track your request's progress in sircon.com.
Does one evite cover all types of contracting?	No. Each evite applies to a specific sales channel, contract level, and line of business. If the evite does not match the contract you want, stop and contact the upline, recruiter, or team that started the request before moving forward.
What happens if I don't complete an evite?	If an evite disappears from your sircon.com account contracting to do list, it has closed or expired. Contact the upline, recruiter, or team that started the request.
Can I complete more than one evite?	You should complete one evite at a time. If you have multiple evites from the same upline, recruiter, team, or sales channel, use your contracting to do list and complete the evite for the sales channel, upline, and level you want to align with.
What happens if I complete the wrong evite?	If you believe you completed the wrong evite, contact your upline, recruiter, or the team supporting your contract as soon as possible for guidance.

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What if I decide not to proceed with completing the evite?	Stop completing the evite, and it will close in approximately 30 days. If you decide to move forward within that 30-day period, access your sircon.com account contracting to do list and select the evite.
How can I check the status of my onboarding or contracting request?	You can monitor request's status by logging into your sircon.com account, which provides visibility into where you are in the process. Your sircon.com account is the primary tool used to track contracting progress and status.
Will I receive notifications during the contracting process?	Yes. Email notifications are sent at key points in the contracting process. Your sircon.com account is the fastest way to verify your contracting status, and notifications are stored in the Documents section.
What happens if my contract is denied due to a background review?	If a contract is denied due to a background review, contracting cannot move forward. Any next steps, if applicable, will be communicated by UnitedHealthcare.
Why does contracting take time?	Contracting timelines vary based on the request type, how long the producer takes to complete channel-specific contracting requirements, and UnitedHealthcare's review. Submitting complete and accurate information helps avoid delays.
What should I do if I want to terminate or change my contract?	If you want to terminate or change your contract, review the options available for your sales channel and situation, as not all options apply to every channel. Refer to the applicable UnitedHealthcare Agent Guide for details on available options, which may include obtaining a valid release, submitting a Notice of Intent to Move (ITM), or requesting a hierarchy or sales channel change. Contact your upline (if applicable) to discuss the appropriate next steps. If you do not work with an upline, contact UnitedHealthcare for guidance.
Can I self-terminate my contract as a form of self-release?	No. Self-releases are not valid. Self-terminating a contract does not serve as a self-release and will require a valid release to contract immediately with a new upline or sales channel. If a release cannot be provided, a waiting period may be required before you are eligible to contract again. Instead, submit an ITM. For additional guidance, refer to the Notice of Intent to Move (ITM) FAQ and your Agent Guide on Jarvis.

**This guide reflects standard processes. Steps may vary depending on contract level. See your Agent Guide in Jarvis for additional guidance.*

Additional Reference & Usage Notice

Authoritative guidance: This FAQ is intended to provide high-level informational support and general clarification only. Information is subject to change without notice. In all cases, the Agent Guide available on Jarvis serves as the official source of truth and should be consulted for comprehensive policy requirements, eligibility criteria, and situation-specific guidance.

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