Agent Quick Reference Guide

Notice of Intent to Move



A **Notice of Intent to Move (ITM)** allows an eligible, active producer to change their top level upline or sales channel without a release letter after completing a required waiting period.

Submitting an ITM does not move you immediately. It establishes eligibility for a future transfer once the waiting period and all applicable rules are met.



**Waiting periods are calculated to include all contracting requirements and blackout periods.*

Frequently Asked Questions:

Who is eligible to submit an ITM?	Active producers who have been with their current upline for 6 months and meet current channel, hierarchy, and tenure eligibility rules. Producers that have been with their current upline for less than 6 months, are at certain contract levels, or are inactive are ineligible. Please refer to your Agent Guide on Jarvis for channel specific ITM information.
What are the ITM submission requirements?	A valid ITM must: • Must be submitted directly by the producer to UnitedHealthcare • Include your current top level upline as a copied recipient • Indicate the name of your intended new upline or channel you are moving
When should I use an ITM instead of a release letter?	An ITM may be used when you cannot obtain a release letter and meet eligibility rules that allow a transfer after the waiting period. If you want to move immediately, a release letter is required.
Do I need to specify who I want to transfer to when I submit an ITM?	Yes. When submitting an ITM, you must identify the specific upline or channel you intend to move to. The ITM is valid only for the originally requested upline.
What if I change my mind on the intended upline?	A new ITM must be submitted, and a new waiting period will apply.
How long is the ITM waiting period?	The waiting period is 90 days and may be impacted by channel, contracting requirements, and blackout periods.
When does my waiting period begin?	The ITM waiting period begins when your email submission is received. You will receive an acknowledgment email with your eligible-to-move date.
Can I submit an ITM at any time of year?	Yes. ITMs may be submitted year-round, including during blackout periods. However, moves cannot be completed during blackout periods and may affect the eligible move date.

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Frequently Asked Questions:

Does submitting an ITM move me right away?	No. Your acknowledgement email starts the waiting period. This is not an immediate move and will proceed only once the waiting period and contracting requirements are satisfied.
How will I know my ITM was received and accepted?	You will receive an acknowledgment confirming receipt and whether your ITM meets eligibility requirements.
How is my ITM eligible move date determined?	Move eligibility is based on the ITM receipt date, applicable waiting periods, and blackout restrictions.
Can I still sell during the ITM waiting period?	Yes. You may continue selling under your current Agent ID as your hierarchy will remain unchanged during the waiting period.
What happens after my waiting period ends?	You have a 30-day eligibility window to complete contracting with the originally requested upline. Contracting invitations (evites) are issued at the upline's discretion.
What if I obtain a valid release letter during my ITM? Do I still need to wait to move?	No. If you receive a valid release letter during your ITM waiting period, please work directly with your preferred upline to complete contracting. The release letter must be included in your contracting submission. Once verified, your request will proceed and the ITM request will be closed on your behalf.
What if no contracting is submitted during the 30-day window?	If the window expires without completed contracting, your hierarchy remains unchanged, the ITM expires, and a new ITM must be submitted with a new waiting period satisfied.
Do I receive notifications during the ITM process?	Yes. Email notifications are sent when an ITM is acknowledged as valid or denied, when the eligible transfer window opens, and when the ITM is canceled or expired.
How will I know my transfer was successful?	Your transfer is complete once you've signed the contracting documents and received a notification confirming the change. You can also log in to your Jarvis account and review your profile to confirm your new upline is listed.
Why would my ITM be denied?	An ITM may be denied if eligibility rules are not met, required information is missing, or the producer is inactive.
What happens if my ITM is canceled or expired?	If the ITM is canceled or expired, your hierarchy remains unchanged, the ITM expires, and a new ITM must be submitted and a new waiting period satisfied.

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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