Book of Business
Frequently Asked Questions

Section 1: Member Status (NEW!)

1. What is the Member Status column?

The new Member Status column allows you to more easily identify and prioritize members to reach out to, or who may need more support or have questions. The Member Status column displays information for 3 Medicare Advantage plan scenarios:

- Whether a member is impacted by a Service Area Reduction (SAR)
- Where a member is in the chronic condition verification process for Special Supplemental Benefits for the Chronically Ill (SSBCI)
- Where a member is in the chronic condition verification for their Chronic Special Needs Plan (C-SNP)

2. Why is the Member Status column blank for some members?

Members who are not impacted by one of the 3 status types (SAR, SSBCI, C-SNP) will display nothing in the Member Status column. To view impacted members, select the Filters option, select the Member Status dropdown and choose the statuses you would like to view.

3. How long does a Member Status display?

Statuses reflect the most recent update we have for a member.

- SAR statuses display until the member is enrolled into a future plan or is past their current plan's termination date. This status allows you to know which members are impacted but don't have another plan yet.
- SSBCI statuses display until 30 days after the plan's effective date. These statuses allow you to help your clients understand where they are in the SSBCI verification process and if any action is needed.
- C-SNP statuses will display until 2 months after the plan's effective date. These statuses help you know which of your clients are impacted and, if needed, action you can take to support the verification process.

4. Can a member view or change who the verifying provider is for SSBCI Member Statuses?

The provider verifying the chronic condition does not display in Book of Business. Members can call Member Services to inquire or make changes. Note: A member's Primary Care Provider (PCP) may be different from their verifying provider for their chronic condition.

Benefits, features and/or devices may vary by plan/area. Limitations, exclusions and/or network restrictions may apply. Confidential property of UnitedHealth Group. For Agent use only. Not intended for use as marketing materials for the general public. Do not distribute, reproduce, edit, or delete any portion without express permission of UnitedHealth Group. 11.14.2025

Section 2: Additional Tips and Tricks

1. How soon will a new enrollee display in Book of Business?

A new Medicare Advantage member (including members who enrolled during the Annual Enrollment Period (AEP)) will display in Book of Business 1-2 weeks after CMS has approved the member's application.

2. Why don't I see *any* members in my Book of Business?

Some of the most common reasons are:

- If you receive commission payments via paper check, members won't display on your Book of Business until their plan becomes effective and your paper check is issued.
    - To view Medicare Advantage members within 1-2 weeks of plan approval (our standard processing time), simply update your payment method to direct deposit on your Account page on Jarvis.
- If you are a solicitor / Licensed Only Agent (LOA), you will not see a Book of Business. Contact your upline for a list of members you enrolled.

3. Why don't I see a *specific* member in my Book of Business?

Some reasons include:

- If a member enrolls into a UnitedHealthcare plan with another agent where Agent of Record (AOR) retention does not apply, the member will be removed from the first agent's Book of Business within 1-2 weeks of plan approval.
- An inactive member will be removed from your Book of Business after 90 days.
    - Prior to that, you can use the "Inactive" filter to view inactive members.
- The Book of Business dashboard displays up to 500 members in alphabetical order at a time. So, scrolling for a member using the alphabetical page list view may not yield all members. If your book is 500+ members, search by member name or download your book of business to view all members.
- Uplines may experience a short timeframe, approx. 2-5 days after a plan approval, where they do not yet see a new member in the Book of Business.

4. Does the Filters option pull results from my entire Book of Business?

Yes, searching via Filters will pull results from your full Book of Business, even if you have more than 500 members.

Benefits, features and/or devices may vary by plan/area. Limitations, exclusions and/or network restrictions may apply. Confidential property of UnitedHealth Group. For Agent use only. Not intended for use as marketing materials for the general public. Do not distribute, reproduce, edit, or delete any portion without express permission of UnitedHealth Group. 11.14.2025

5. Why doesn't my download file display my filtered content?

Selections you apply with Filters will not transfer to your download file. Instead, please download your entire book and filter directly within the Excel file.

6. If a member's HPBP number will change in 2026, how do I find the new one?

A member's profile page in the Book of Business tool will display their current 2025 plan year HPBP number. To see their number for 2026, download your Book of Business file, search for the member in the file, and it will display. When 2026 information is available, the member's 2026 HPBP number will display in their profile page in the Book of Business tool.

- Note: HPBP must be selected in the download file to see it.

Additional Resources:

- Book of Business – 2026 Quick Reference Guide
- Book of Business - How-to videos, on-demand on Learning Lab

Benefits, features and/or devices may vary by plan/area. Limitations, exclusions and/or network restrictions may apply. Confidential property of UnitedHealth Group. For Agent use only. Not intended for use as marketing materials for the general public. Do not distribute, reproduce, edit, or delete any portion without express permission of UnitedHealth Group. 11.14.2025