

Jarvis Book of Business – Individual & Family Plans Member Profile Page

In **Jarvis**, you will be able to support your members through the Member Profile page. You can order a Member Card, view Application and Commission Details, or change the Primary Care Provider (PCP) for a member.

Accessing the Member Profile Page

Access your Book of Business from the Jarvis homepage by selecting **Book of Business or UHC Members**.

The screenshot displays the Jarvis Book of Business homepage. The top navigation bar includes links for Home, Contracting, Sales Tools, Applications, Commissions, Book of Business (highlighted), Knowledge Center, and Reporting. The main dashboard features a 'Welcome' message, a 'WID' field, and a 'Pended Applications' count of 0. The 'UHC Members' count is 1889, with a red box highlighting the 'UHC Members' link. Other metrics include 'Late Payment' (39), 'Turning 26' (9), 'Turning 65' (17), 'UHC Online Account' (188), and 'PHD Escalations' (1). The right sidebar contains a 'Quick Access' section with links to 'Favorites', 'Agent Support', 'Knowledge Center', 'CMS Rules for PY26', 'Selling Resources', and 'IFP Book of Business How-to Videos'.

Scroll down to see and filter a list of your members. Or, select **Download Results** to download it. Note: there is a maximum of 500 records that can be displayed, so it is highly recommended that you download your Book of Business to view all results. When you scroll down on the Book of Business homepage, you will see an alphabetical list of your members. Change the **Member Status** to view **Active** or **Inactive** members and click **Display**. You can search by **Member Number**, **Name** and **State**. You can also filter your results by **Plan Code** or **Product**. Select a member's name to access the member's profile information. On this page, you can see current information on the member and view their payment information.

Jarvis Book of Business – Individual & Family Plans Member Profile Page

CUSTOMER NAME

Plan Plan Code

Plan Status Desp
✓ Active

Date Of Birth

Member Number

Agent Of Record

Member Information

Application Details

Commission Details

Quick Links

- [Member ID Card](#)
- [Change Provider](#)
- [Submit Member Escalation Form](#)
- [Member Escalation Status](#)

Contact Information

Primary Phone Number:

Secondary Phone Number:

Email:

Permanent Address:

Mailing Address:

Authorized Representative:

Premium Status

Premium Amount:

Payment Method:

Past Due Amount:

View Member Card

- From Quick Links, click **Member ID Card**.
- You can download the Member ID Card by **hovering over the image and right-clicking** to open and send the image to your member.

Quick Links

[Member ID Card](#)

[Change Provider](#)

[Submit Member Escalation Form](#)

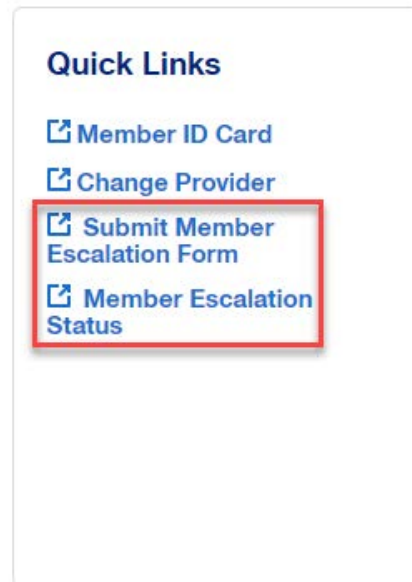
[Member Escalation Status](#)

- ## Member ID Card

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Member Escalation

- If a member issue has become difficult to resolve through Member Services and/or tools in the online member portal (myuhc.com/exchange), please complete the Member Escalation Form
- From Quick Links, select **Submit Member Escalation Form**
- Once an escalation has successfully been submitted, you can check the status of the request by clicking on **Member Escalation Status** in Quick Links
- Please note: this form should only be used to escalate member issues. For agent-specific issues and commission questions regarding your Book of Business, please continue to contact the PHD



Member Escalation Form

1. This form is for member escalation issues only. **Prior to escalating**, you or your member must have attempted to call Member Services to attempt the resolution, but the issue was not resolved.
2. This form is not approved for member use, it must be filled out on behalf of the member.
3. Complete all fields to ensure timely processing of the request. Missing Information will delay escalation of the issue.

For AARP Medicare Supplement Plans, please use the Member Service Request Tool instead of the Escalation Form to request account updates and provide missing application information on behalf of your client. The Service Request Tool can be accessed via the Book of Business or Application Status page.

*Required fields below.

Have you reached out to Member Service?

- ☐ Yes
- ☐ No

Change Provider

- From Quick Links, click **Change Provider**. Current and future providers are displayed; one or both can be changed.
- Click the **Change Provider** button on the right-hand side to **launch Rally** and make changes to the PCP.
- Click **Submit**.
- If the current PCP has been changed, the new PCP will become effective on the 1st of the following month.
- If changes are made to a future PCP, it will become effective as soon as the plan is effective.

Quick Links

- Member ID Card
- Change Provider**
- Submit Member Escalation Form
- Member Escalation Status

Current Primary Care Provider

Provider Name	Plan Effective Date	PCP Effective Date
PROVIDER NAME	2024-01-01	2024-01-01

Future Primary Care Provider

Provider Name	Plan Effective Date	PCP Effective Date
PROVIDER NAME	2025-01-01	2025-01-01

Select Plan-

Change Provider

Invoice

2024-08-08

MAIL

Invoice

2024-08-08

MAIL

Invoice

2024-08-08

MAIL

Invoice

2024-08-08

MAIL

Uniform Modification Letter

2024-10-24

MAIL

Current Primary Care Provider

Provider Name	Plan Effective Date	PCP Effective Date

Current Plan

Change Provider

Do you know the primary care provider's name?

Vidor, TX 77662

Change Location >

Search for providers and services

Search

Select a type of primary care provider

All Primary Care Providers

The first person you call when you have a medical concern. Primary care providers can be doctors in family practice, internal medicine, pediatrics or other specialties.

Primary Care Medical Group

Primary care medical groups have multiple doctors who can provide primary care. These groups range from small practices to large organizations of doctors.

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Stay informed on COVID-19
Learn about the resources available to you.

See COVID-19 Resources



FIND CARE

SAVED

ENGLISH ▾

AL INDIVIDUAL EXCHANGE BENEFIT PLAN



William R. Kleinschrodt, MD
Internal Medicine
★★★★★ (7)

In-Network

Save

(251) 435-1200

Select PCP

OVERVIEW

SERVICES & COSTS

LOCATIONS

PATIENT REVIEWS

Location

1720 Spring Hill Ave Ste 300
Mobile, AL 36604
3.1 Miles Away | [Get Directions](#)

Phone

(251) 435-1200 Phone
711 TTY
(251) 435-6351 Fax

Website

Not Available

Email

Not Available

Accessibility

[Parking >](#)
[Bathrooms >](#)

Additional Information

♥♥ Premium Care Physician

✓ Accepting Existing Patients Only

Provider ID

IMC-DIAGNOSTIC & MED CLINIC
001338373007

Application Details

- From the Member's Profile page, you can view the status and details of the application in **Application Details**.

Member Information

Application Details

Commission Details

Application Status:

✓ ACTIVE

Agent ID

Agent Name

Plan

Product

Product

Plan Code

State

Commission Details

- Also from the Member's Profile page, you can view the status and details of your commission for that specific member in **Commission Details**.
- Note that your comprehensive commission information is available under the **Commissions** tab found on the navigation bar.

Member Information	Application Details	Commission Details
Commission Status		
✓ PAID		
Commission Details		
Signature Date		
Agent Name		
Agent Id		
Organization Name		
Source		

If you have any questions, please feel free to contact the PHD at **1-866-235-4095**, TTY **711**, 7 a.m. to 9 p.m. CT, Monday - Friday.

