

Jarvis Electronic Scope of Appointment



Jarvis allows you to take an electronic Scope of Appointment (SOA). The electronic SOA can be signed by using the *Sign In JarvisEnroll now* option or the *Remote Signature* processes.

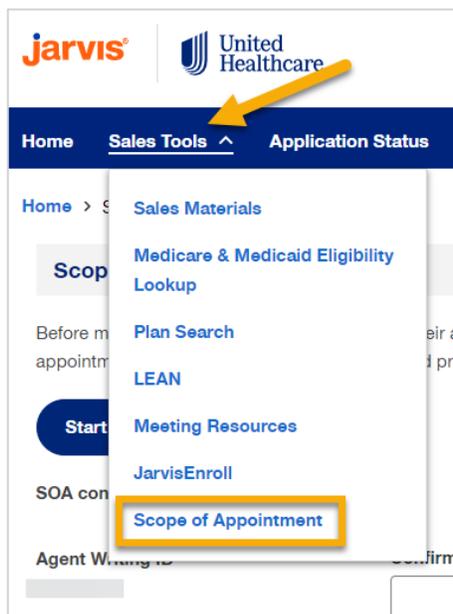
You must obtain a SOA from each consumer present at a one-on-one marketing appointment. Unless one of the following exceptions applies, the SOA must be obtained no less than 48 hours in advance of the appointment. When an exception applies, the SOA must be obtained at the start of the appointment. Exceptions include:

- The last four days during a valid election period for the consumer; or
- Unscheduled in-person meetings (e.g., walk-ins) initiated by the consumer;
- Inbound consumer-initiated calls

Note: See your Agent Guide or the Sales Policy Scope of Appointment job aid for more information on SOA rules.

Locating the Scope of Appointment (SOA)

Log into Jarvis, navigate to the Sales Tools tab and select **Scope of Appointment**.



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Jarvis Electronic Scope of Appointment



Starting a new Scope of Appointment (SOA)

Click on the **Start New Scope** to pull up the Scope of Appointment form.

Home > Sales Tools > Scope of Appointment

Scope of Appointment

Before meeting with a Medicare beneficiary (or their authorized representative), Medicare requires that Licensed Sales Representatives use this form to ensure your appointment focuses only on the type of plan and products you are interested in. A separate form should be used for each Medicare beneficiary.

Start New Scope

SOA confirmation search criteria

Then the form will display.

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Home > Sales Tools > Scope of Appointment

SOA Details

Scope of Appointment Confirmation Form

Select Language
English

Please check what you want to discuss with the Licensed Sales Representative: *

At LEAST ONE of the options below must be checked in order for the Scope of Appointment to be completed

Medicare Advantage Plans (Part C) and Cost Plans Dental-Vision-Hearing Products
 Stand-alone Medicare Prescription Drug Plan (Part D) Hospital Indemnity Products
 Medicare Supplement (Medigap) Plans

Licensed sales representative first name Licensed sales representative last name Licensed sales representative id

Are you the authorized representative?

Beneficiary information

Beneficiary first name * Beneficiary last name * Beneficiary phone number

Date appointment will be completed *

Beneficiary address * City * Beneficiary zip code *

County * State *

Save & Close Continue →

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Choose the preferred language from the dropdown and select the products the consumer agree may be discussed during the appointment. You can select more than one option.

Home > Sales Tools > SOA

1 SOA Details 2

Scope of Appointment Confirmation Form

Select Language
English

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Please check what you want to discuss with the Licensed Sales Representative: *

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Medicare Advantage Plans (Part C) and Cost Plans Dental-Vision-Hearing Products
 Stand-alone Medicare Prescription Drug Plan (Part D) Hospital Indemnity Products
 Medicare Supplement (Medigap) Plans

If there is an authorized representative assisting with the form, you can enter in their information by selecting the box.

Are you the authorized representative?

Beneficiary Information

Beneficiary first name *

Enter in the consumer's name and phone number (if available).

Beneficiary Information

Beneficiary first name * Beneficiary last name * Beneficiary phone number

Then enter the date of the appointment.

Date appointment will be completed *

mm/dd/yyyy

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Enter the consumer's address. Please note that when you enter the zip code, the county will display, and the state will autofill. Lastly, click **Continue**.

Beneficiary address * City * Beneficiary zip code *
County * State *

Close Continue →

The second page of the SOA is where you will choose how the consumer is signing.

You have 3 options:

- Sign In JarvisEnroll now
- Sign via email with Remote Signature
- Sign via text with Remote signature

Home > Sales Tools > Scope of Appointment

SOA Details 2 Signature

Signature type *

Sign in JarvisEnroll now
 Sign via email with Remote Signature
 Sign via text with Remote Signature

If you need to go back to the previous page, click the **Previous** button.

Close ← Previous Complete SOA →

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Sign In JarvisEnroll now Signature

The *Sign In JarvisEnroll* option is only used when you are face to face with the consumer/authorized representative. Read the grey box to the consumer and then click the “Click to review the PDF with Beneficiary/Authorized Rep”. Once the PDF downloads, review the SOA with the consumer to make sure everything is filled in correctly. Once the consumer confirms, **have the consumer** check the acknowledge box.

Signature type *

Sign in JarvisEnroll now

Sign via email with Remote Signature

Sign via text with Remote Signature

By signing this form, you agree to meet with a Licensed Sales Representative to discuss the previously selected products/plan types. The Licensed Sales Representative is either employed or contracted by a Medicare plan and may be paid based on your enrollment in a plan. They do NOT work directly for the federal government.

Signing this form does NOT affect your current or future enrollment in a Medicare plan, enroll you in a Medicare plan or obligate you to enroll in a Medicare plan. All information provided on this form is confidential.

Steps to Sign Scope of Appointment

1. [Click to review PDF with Beneficiary/Authorized Rep *](#) ←

Beneficiary/Authorized Rep Signature *

Ensure the Beneficiary/Authorized Rep is clicking the box below

By checking this box, I the Beneficiary/Authorized Rep, intend to sign this form electronically. I acknowledge that the information provided above is accurate. *

| | |
|------------------------------------|---|
| Beneficiary name test test | Beneficiary signed date |
| Licensed sales representative name | Licensed sales representative signed date |

This will populate the signature dates, and you can select **Complete SOA** to complete the process.

Close

← Previous

Complete SOA →

Note: The Remote Signature process for SOA is the same as it is for enrollment applications. Please see the Email and Text Remote Signature Job Aid if you need more information.

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Completed Scope of Appointments

To locate your completed SOA, you can use the search criteria by entering the consumer's name and/or confirmation number. Once entered, click on the **SOA Search Confirmation**. You have the ability in the upper right to search for any SOAs that were completed in LEAN. Just select LEAN in the dropdown and search with the confirmation number or member's name.

Scope of Appointment

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[Start New Scope](#)

SOA confirmation search criteria

Agent Writing ID

Confirmation Number

Beneficiary First Name

Beneficiary Last Name

Signature Date - From

Signature Date - To

[SOA Search Confirmation](#)

Medicare beneficiary.

[LEAN](#) X v

You can also locate the past 60 days of completed SOAs under the **Completed** tab. You have the option to download the SOA and start the application directly from this area.

Signature Date - From

Signature Date - To

[SOA Search Confirmation](#)

[Action Required](#) [Completed](#)

| Conf # | First Name | Last Name | Signed Date | Date Completed | |
|------------------|------------|-----------|-------------|----------------|---|
| S-17745305172024 | test | test | 05/17/2024 | 05/17/2024 | Download SOA Start Application |
| S-16818105072024 | PDF | TEST | 05/07/2024 | 05/07/2024 | Download SOA |



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Scope of Appointments Requiring Action

To locate your SOAs that require action, such as a signature, click on the Action Required tab. From there you will be able to see the status of the SOA.

There will be 3 statuses for the SOAs requiring action:

- **Remote Signature: Failed** for remote signature requests that have expired or been voided by the consumer. These can be reopened and resent to the consumer by selecting Resume App. RS Report is the Remote Signature Report that will give you some insight on the reason the Remote Signature Failed.
- **Remote Signature: In Progress** for remote signature requests that have been sent to the consumer but not yet completed. A resend app function will be available where you can resend the SOA to the consumer if the email or text phone number you entered on the SOA was incorrect, or if you needed to edit the access code. This functionality can only be done one time.
- **Incomplete** for saved SOAs. These can be opened from where you left off by selecting resume app.

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[Start New Scope](#)

SOA confirmation search criteria

Agent Writing ID Confirmation Number Beneficiary First Name Beneficiary Last Name

Signature Date - From Signature Date - To

[SOA Search Confirmation](#)

[Action Required](#) [Completed](#)

| Conf # | First Name | Last Name | Signed Date | Status | Date Completed |
|------------------|------------|-----------|-------------|-------------------------------|---|
| S-16764104292024 | s | s | | Remote Signature: In-progress | Resend RS Report |

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