



JarvisEnroll allows you to obtain the consumer's signature by remote signature via email or text. Remote Signature applications must be completed within 24 hours of launching the Remote Signature process.

Sales Tools >	JarvisEnroll (MA & PDP)				(1
1	2				5
ew Application	Medicare Info		Applicant	Product/Plan	Questionna
New Applicatio	n				
Check eligibility	for this member				
Check eligibility	for this member		Language		
Check eligibility Signature Type *	for this member	^	Language English		~
Check eligibility Signature Type * Select In-Person Signature	for this member	^	Language English		~
Check eligibility Signature Type * Select In-Person Signature Voice Signature	for this member	^	Language English		~
Check eligibility Signature Type * Select In-Person Signature Voice Signature Via	for this member	^	Language English	0	~

When you start the application in JarvisEnroll, you will first select the signature option before moving forward with the application. In the "Signature Type" Field, choose Remote Signature via Email. Continue through the application.

ew Application	Medicare Info	Applicant	Product/Plan	PCP	Questionnaire	Payment Si	gnature
ning with Remo	ote Signature						
*Please note th Navigating on *	is application cannot be this Page:	e edited during an in-	process Remote Signatu	e Request			
While si not nee	igning with Remote Sign id to sign.	ature, the applicant v	vill be using Adobe Sign,	a trusted company	that provides electronic s	igning for documents. The a	jent will
You may	y switch between signat	ure options at the top	of this page.				
Submission Gu	uidelines:						
The app	plicant will need to sign t	the application within	24 hours of when the "La	unch Remote Sign	nature" button is clicked.		
 If you ar 	re submitting an applica	tion less than 24 hor	urs from the effective da	te, the applicant n	nust sign before 11:59 Pl	M CST.	
 If the ap 	oplicant signature is not	captured before the e	effective date, then a new	application with a	new effective date will nee	d to be completed.	
If the ap	oplication is not success	fully submitted within	24 hours, the status in the	ne Action Required	tab will read "Remote Sig	nature: Failed"	
The age	The agent can re-open the application in the Action Required tab. At this point, the agent can make any necessary edits and:						
1. F OR 2. F	Proceed with a new text	signature request	nroll				
Access Code:							
The Rer	mote Signature email wi	Il include a Review a	nd sign link that requires	an Access Code t	o be entered.		
Please	create an Applicant Acc	ess Code below.					
You mu	st provide the Access C	ode to the applicant.					
The Acc	cess Code must be betv	veen 5-15 characters	long. You may include bo	th numbers and le	tters. The code is not cas	e sensitive.	
Please r	note the Access Code w	ill expire after three	failed attempts.				
I ttest that I ha	we discussed with the b	eneficiary the benefit	s and rules for this plan a	nd the beneficiary	wishes to be sent this enr	ollment application *	
plicant Email *		App	licant Access Code *		Agent Email	*	
					[Inv*******		@YAHOO.C

Once you get to the signature page of the application, you will need to communicate everything in the grey box to the consumer. Once the consumer understands and agrees, click the attestation.

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You and the consumer need to create an access code. The code needs to be 5-15 characters long. It is not case sensitive. Enter the code into the "Applicant Access Code" field. NOTE: You cannot edit your email listed in JarvisEnroll. If it is listed incorrectly, go to your profile page in Jarvis and correct your email. Select "Launch Remote Signature".





neo h	sus the socilizant elon within 28 hours to exhibit this poplication
nfirma	ation # AE-18505708192024
t Step	ps:
•	Please tell the applicant to check their inbox for an email from UnitedHealthcare with the subject line "IMMEDIATE ACTION REQUIRED: Sign Your Document". Provide Access Code to the applicant.
	The entail will include instructions and a Howev and sign link that requires the Access code to be entered, please note that Access Codes expire after three failed attempts. Once the applicant has signed, the application will automatically submit and can be viewed in the agent's "Submitted" tab of "My Applications". Both parties will receive an e-mail from Adobe Sign with the completed application attached.
•	If the Remote Signature request has expired or failed, the agent can re-open the application in the Action Required tab and complete one of the following stops:
	1. Proceed with a new remote signature request via text or email.
	2. Both parties can sign in-person within JarvisEnroll.
	3. If the applicant no longer wants to enroll, delete the application from the Action Required tab.
•	For help, please contact Producer Help Desk at 1-888-381-8581.

The confirmation page will populate after you launch the remote signature process.

You will need to communicate the next steps to the consumer, so they are aware for what to look for in their email inbox.

Provide the access code one more time to the consumer, and if possible, stay connected while they go through the signature process.

Your consumer has 24 hours to sign. If you need to make changes to the application after it was launched, you can do that from this confirmation screen. When selecting the "Edit/Resend" button, you can select "Edit" in the popup to make changes to the application if needed. Then you will need to resend the application again to the consumer.

Once the remote signature is launched, the consumer will receive an email with the subject line stating, "Immediate Action Required – Sign Your Document".

Once the consumer clicks on the email, it will open to an instruction page. Under the "Action Required" area there will be instructions on the signature process, and when the consumer is ready, they select "Review and Approve".

Unitedr	Medicare Enrollment
	Review and approve
Hello,	
Please take the fo must be signed w	llowing steps to sign your document. This document ithin 24 hours.
Action Required:	
1. Click the 'Review	w and Approve' button above
2. Authenticate by	entering the Access Code provided by your agent
3. Review the enti	re document
4. Click the check	box at the bottom of the screen.

-	This documen	t is password protecte	ed
	You need a password to acc will need to contact <u>Lean M</u>	ess this document. If you do not have the edicare Enrollment Test.	e password,
	Enter password	Continue	
	-		

The consumer will then be prompted to enter in the access code. This is the code that you and the consumer created.





Once the access code is entered, the application will populate, but the consumer will not be able to sign until they select "Continue".



The consumer can either scroll through the application until the signature option appears or select the word "Start" on the left side to go directly to the signature page.

	Medicare Enrollment
	United Healthcare
	New Application
	Agent Note: Does the Consumer currently have a Medicare Supplement plan in place? Oves No
	Application Type:
	Remote Signature via Text Language:
	English Enrollment Type:
	Individual
	Script Type:
	Master Script
	 Consent to 1 ext Application Link If you provide your cell phone number, we'll send you a one-time confirmation text message that may include personal health information. Text messages are not secure and your information could be seen by a third party with access to your cell phone. Message and data rates may apply. Texting Terms and Conditions are located at https://uhc.care/enrollmedicare.
	Do you agree to the texting terms and conditions I provided to you? © Yes O No
	Questions
	First of all, do you understand the benefits we covered earlier?
	• Yes
Start	O No Do I have your permission to record this enrollment application? ● Yes O No
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United Healthcare



The consumer must check the box that states that they agree to sign the form electronically by using the "Click to Approve" button. They are acknowledging that the information provided on the enrollment application is accurate.

After the box is checked off, the last step is to click on the "Click to Approve" button. Signing is then completed.

Applicant Approver Date:	
09/11/2024	
By selecting the checkbox below and clicking the 'Click to Approve' button, I the Beneficiary/A	Authorized Rep, intend to
sign this form electronically. I acknowledge that the information provided on this enrollment ap	oplication is accurate and
it is my intent to enroll in the plan indicated above.	< X
40°	ςΟ`
	X
	~O~
By approving, I agree to this document, the <u>Consumer Disclosure</u> and to utilize electronic signatures.	Click to Approve

The consumer will see a confirmation page where they can download the application and will receive an email with the signed application. You, the agent, will also receive an email letting you know your consumer has signed.









Remote Signature via Text

Home > Sales Tools > JarvisEnroll (MA & PDP)	If you choose Remote Signature via Text when starting the application, there will be a disclaimer that you need to read to the consumer, and the consumer needs to agree
Would the applicant like to receive the link to their application to review and provide signature over text? *	Enter the consumer's mobile phone number and proceed with the application as normal.
Home > Sales Tools > JarvisErroll	2 Once you get to the signature page of the application, you will need to communicate everything in the grey box to the consumer.
 If you are submitting an application less than 24 hours from the effective date, the applicant must sign before 11:59 PM CST. If the applicant signature is not captured before the effective date, then a new application with a new effective date will need to be completed. If the application is not successfully submitted within 24 hours, the status in the Action Required tab will read "Remote Signature: Failed" The agent can ne open the application in the Action Required tab. At this point, the agent can make any necessary edits and: Proceed with a new text signature request OR Both parties can sign in-person within JarvisErroll Access Code: The text message will include a link that requires an Access Code to be entered. Please create an Applicant Access Code below. You must provide the Access Code to the applicant. The Access Code must be between 515 characters forg. You may include both numbers and letters. The code is not case sensitive. Please note the Access Code will expire after three failed attempts. 	Once the consumer understands, you and the consumer need to create an access code. The code need to be 5-15 characters long. It is not case sensitive. Enter the code into the "Applicant Access Code" field. NOTE: You cannot edit your email listed in JarvisEnroll. If it is listed incorrectly, go to your profile page in Jarvis and correct
Close Close Launch Text Signature	your email. Select "Launch Remote Signature".

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United



nfirma nt Ste	ation # AE-17747305202024
•	Please tell the applicant to check their mobile phone for a text message from number 45202 or phone number ending in 2396.
	The text will include a link that requires the Access Code to be entered. Please note that Access Codes expire after three failed attempts.
•	Once the applicant has signed, the application will automatically submit and can be viewed in the agent's "Submitted" tab of "My Applications".
	If the Remote Signature request has expired or failed, the agent can re-open the application in the Action Required tab and complete one of the followin steps:
	1. Proceed with a new remote signature request via text or email.
	2. Both parties can sign in person within JarvisEnroll.
	3. If the applicant no longer wants to enroll, delete the application from the Action Required tab.
•	For help, please contact Producer Help Desk at 1-868-381-8581.

Your consumer has 24 hours to sign. If you need to make changes to the application after it was launched, you can do that from this confirmation screen. When selecting the "Edit/Resend" button, you can select "Edit" in the popup to make changes to the application if needed. Then you will need to resend the application again to the consumer. The confirmation page will populate after you launch the remote signature process.

You will need to communicate the next steps to the consumer, so they are aware for what to look for on their mobile phone.

Provide the access code one more time to the consumer, and if possible, stay connected while they go through the signature process.



Once the remote signature is launched, the consumer will receive a text message on their mobile phone that is prompting them to respond "Yes".

After the consumer types in the word "yes" and clicks send, a link will be provided for the consumer to access the application.





The consumer will be prompted to enter in the access code. This is the code that you and the consumer created.

Once the access code is entered, the application will populate, but the consumer will not be able to sign until they select "Continue".

The consumer must select the word "Start" in the top right of their mobile device to advance.



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📕 Adobe S	ign		? •
Adobe Sign Sa	andbox	Lea	rn more
≡	2 required field remaining	l(s) 51	art
Anime An	Lean Enrolline	that I have read and	agree
By clicking con to the Adobe on our privacy	erms of Use. See our practices.		
By clicking con to the Adobe 1 on our privacy	<u>erms of Use</u> , see our practices. Continu	e	







The consumer must check the box stating that they agree to sign the form electronically by using the "Approve" button. They are acknowledging that the information provided on the enrollment application is accurate. After the box is checked off, all the consumer needs to do is click on the "Approve" button. Signing is then completed.

The consumer will see a confirmation page with a link to download the signed application. You, the agent, will also receive an email letting you know your consumer has signed





