

# JarvisEnroll Remote Signature Process



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.

## Remote Signature via Email

Home > Sales Tools > JarvisEnroll (MA & PDP)

1 New Application    2 Medicare Info    3 Applicant    4 Product/Plan    5 Questionnaire

**New Application**

Check eligibility for this member

Signature Type \*  
 Select...  
 In-Person Signature  
 Voice Signature  
 Remote Signature via Email  
 Remote Signature via Text

Language  
 English

Is beneficiary? \* ⓘ

1

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.

Home > Sales Tools > JarvisEnroll

✓ New Application    ✓ Medicare Info    ✓ Applicant    ✓ Product/Plan    ✓ PCP    ✓ Questionnaire    ✓ Payment    8 Signature

**Signing with Remote Signature**

\*Please note this application cannot be edited during an in-process Remote Signature Request

**Navigating on this Page:**

- While signing with Remote Signature, the applicant will be using Adobe Sign, a trusted company that provides electronic signing for documents. The agent will not need to sign.
- You may switch between signature options at the top of this page.

**Submission Guidelines:**

- The applicant will need to sign the application within 24 hours of when the "Launch Remote Signature" button is clicked.
- 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 re-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 JarvisEnroll

**Access Code:**

- The Remote Signature email will include a **Review and sign** 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 5-15 characters long. You may include both numbers and letters. The code is not case sensitive.
- Please note the Access Code will expire after **three** failed attempts.

I attest that I have discussed with the beneficiary the benefits and rules for this plan and the beneficiary wishes to be sent this enrollment application \*

Applicant Email \*

Applicant Access Code \*

Agent Email \*

Close    < Previous    Launch Remote Signature >

2

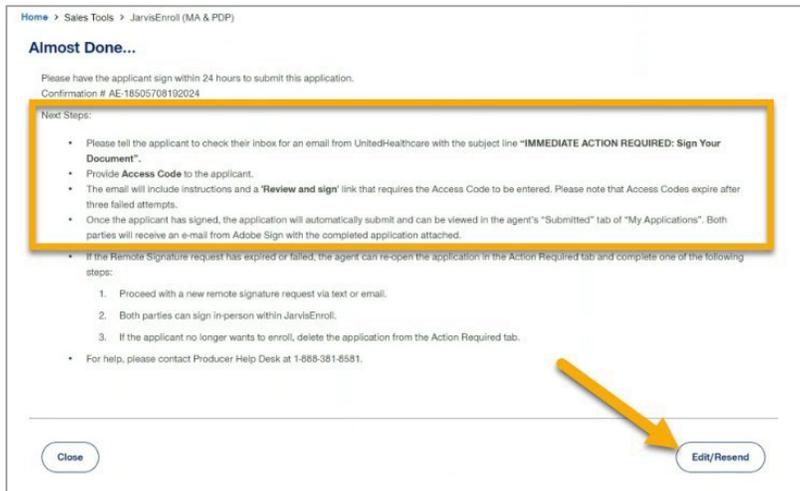
Once you get to the signature page of the application, you will need to communicate everything in the grey box to the consumer. Once the consumer understands and agrees, click the attestation.

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".

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# JarvisEnroll Remote Signature Process



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

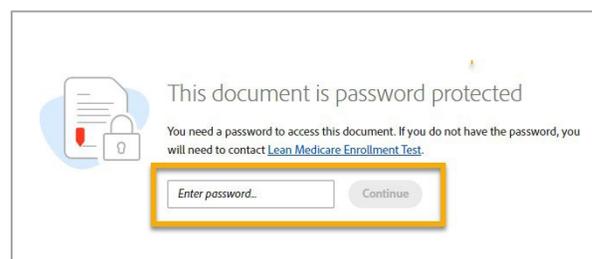
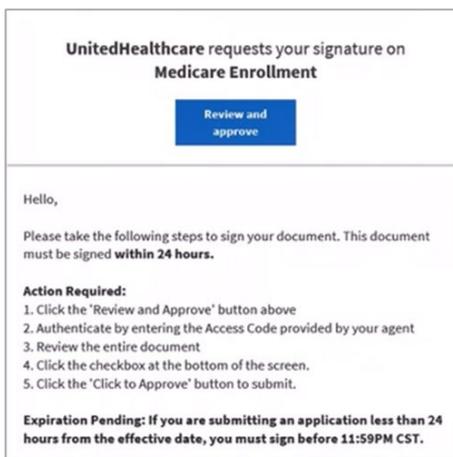
You will need to communicate the next steps to the consumer, so they are aware for what to look for in their email inbox.

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”.



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

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# JarvisEnroll Remote Signature Process



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

test  
Medicare Number:  
1AA2AA3AA44  
Gender:  
Male  
Date Of Birth:  
01/04/1954

By clicking continue, I acknowledge that I have read and agree to the Adobe [Terms of Use](#). See our [Privacy Policy](#) for details on our privacy practices.

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?  
 Yes  
 No

Application Type:  
Remote Signature via Text

Language:  
English

Enrollment Type:  
Individual

Script Type:  
Master Script

Consent to Text 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  
 No

**Questions**

First of all, do you understand the benefits we covered earlier?  
 Yes  
 No

Do I have your permission to record this enrollment application?  
 Yes  
 No

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# JarvisEnroll Remote Signature Process



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.

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.

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# JarvisEnroll Remote Signature Process



## Remote Signature via Text

Home > Sales Tools > JarvisEnroll (MA & PDP)

1 New Application 2 Medicare Info 3 Applicant 4 Product/Plan 5 Questionnaire 6 Payment 7 Signature

**New Application**

Check eligibility for this member

Signature Type \* Remote Signature via Text Language English

Would the applicant like to receive the link to their application to review and provide signature over text? \*  Yes  No

Text Signature Disclaimer

If you'd like us to send you a text message with a link to your application, we'll first send you a one-time confirmation text that may include personal health information. Text messages are not secure and your information could be seen by a third party that has access to your cell phone. Message and data rates may apply. You can find our full texting terms and conditions at <https://uhc.care/enrollmedicare>. What is your mobile phone number?

Applicant has Reviewed and Accepts Text Signature Disclaimer \*

Applicant mobile phone number \*

- 1 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

Enter the consumer's mobile phone number and proceed with the application as normal.

Home > Sales Tools > JarvisEnroll

New Application Medicare Info Applicant Product/Plan PCP Questionnaire Payment 8 Signature

**Signing with Text Signature**

\*Please note this application cannot be edited during an in-process Text Signature Request.

**Navigating on this Page:**

- While signing with Text Signature, the applicant will be using Adobe Sign, a trusted company that provides electronic signing for documents.
- You may switch between signature options at the top of this page.

**Submission Guidelines:**

- The applicant will need to sign the application within 24 hours of when the "Launch Text Signature" button is clicked.
- 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 re-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
  - Both parties can sign in-person within JarvisEnroll

**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 5-15 characters long. You may include both numbers and letters. The code is not case sensitive.
- Please note the Access Code will expire after **three** failed attempts.

Applicant Access Code \* Agent Email \* [Email Address]

Close Previous Launch Text Signature

- 2 Once you get to the signature page of the application, you will need to communicate everything in the grey box to the consumer.

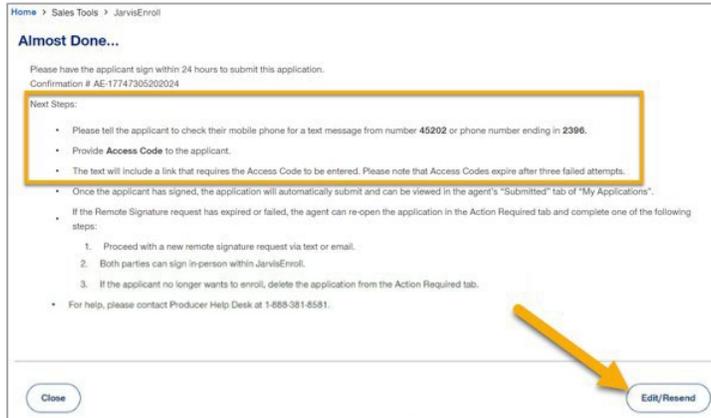
Once the consumer understands, you and the consumer need to create an access code. The code need to be 5-15 characters long. It is not case sensitive. Enter the code into the "Applicant Access Code" field. NOTE: You cannot edit your email listed in JarvisEnroll. If it is listed incorrectly, go to your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

Select "Launch Remote Signature".

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# JarvisEnroll Remote Signature Process

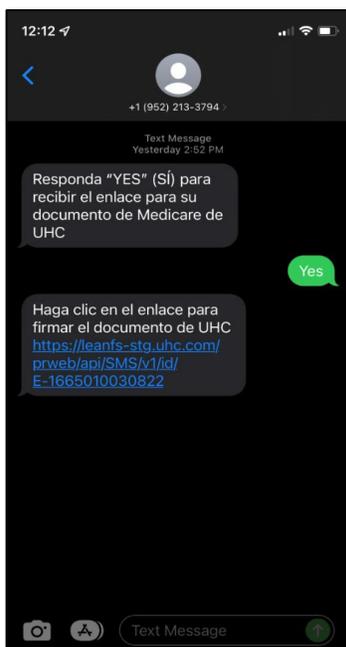


**3** The confirmation page will populate after you launch the remote signature process.

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.

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 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.

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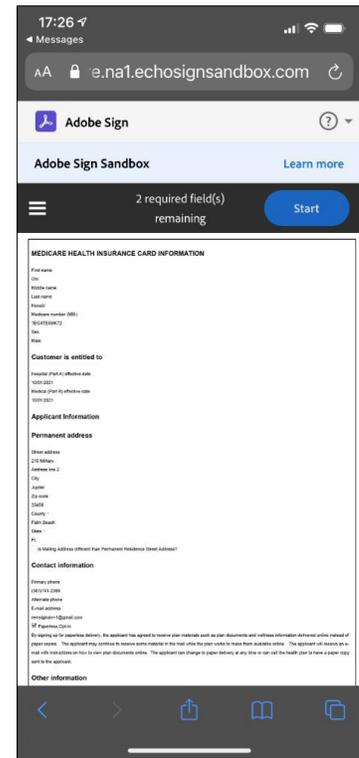
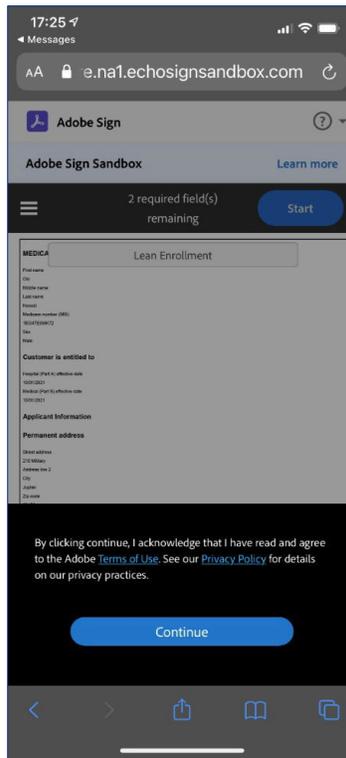
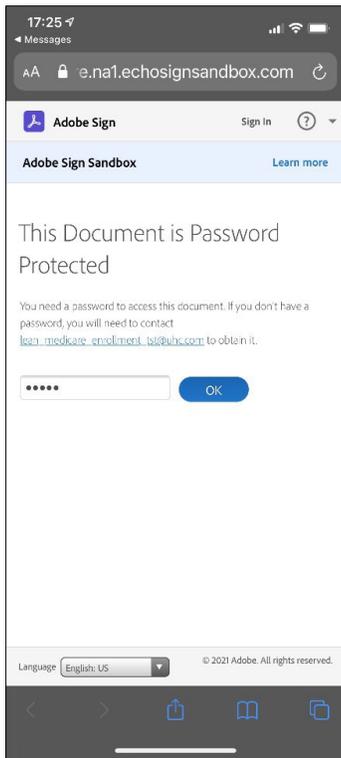
# JarvisEnroll Remote Signature Process



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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# JarvisEnroll Remote Signature Process



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

