

# JarvisEnroll Frequently Asked Questions

## Access and training

### How do I access JarvisEnroll?

Once logged in to Jarvis, select the Sales Tools drop down and click JarvisEnroll. You can also access via the Quick Access links on the homepage. Once logged in to Jarvis, no additional sign in is required.

### Is there a mobile app for JarvisEnroll?

Medicare Advantage enrollment functionality is integrated directly within the Jarvis app! You must update your mobile app to access enrollment functionality. From the Jarvis mobile app, simply click on JarvisEnroll to start an application right from your phone.

Note: The "Start HA" button in the mobile app and the ability to start an enrollment from your Book of Business in the mobile app is not available at this time.

### Where can I find training for JarvisEnroll?

There are many ways to learn more about JarvisEnroll. Go to Learning Lab and search "JarvisEnroll" to find on-demand training and enrollment simulations. You can also reference JarvisEnroll documents on the [Sales Tool Guides](#) page on Jarvis or check the [National Webinar Schedule](#) for upcoming JarvisEnroll webinars.

### How do I view my submitted applications that were in LEAN?

You can access your submitted applications in Jarvis under the [Application](#) tab.

### Will I be able to sell 2025 plans in both LEAN and JarvisEnroll?

JarvisEnroll will have 2025 plans, but LEAN has been fully decommissioned.

## Submitting an application

### Can I start an application offline with JarvisEnroll?

You cannot start an application offline at this time.

### If I started an application in LEAN, can I view it in JarvisEnroll?

If you submitted an application in LEAN, you can view the status of the application in Jarvis under Application. For applications started in JarvisEnroll, you can only view the applications in

JarvisEnroll.

### **What are the required fields to fill out on the application?**

All fields with an asterisk (\*), and the Part A and/or Part B effective dates if applicable to the plan the consumer is enrolling in, are required.

### **Where can I find the electronic Scope of Appointment (eSOA) form?**

The eSOA is found in Jarvis under the Sales Tools tab.

### **Is Voice Signature available for Scope of Appointment (SOA)?**

No. Voice Signature is not available for SOA.

### **Where is the Applicant Search?**

Applicant search is integrated within the **Medicare tab** of the Medicare & Medicaid Eligibility Lookup tool on Jarvis, allowing agents to conveniently search and begin an application from this tool.

### **Where can I choose the signature type?**

The signature type is located on the New Application page in JarvisEnroll.

### **Where can I enter the applicant's date of birth?**

You can enter the applicant's date of birth on the Medicare Info page in JarvisEnroll.

### **Where can I enter the institution address (if applicable)?**

You can enter the institution address on the Applicant page in JarvisEnroll.

### **How can I change the language from English to Spanish?**

You can change the language on the New Application page in JarvisEnroll. Spanish is currently the only other language available.

### **Where can I enter the Authorized Representative's information?**

You can enter the Authorized Representative's information on the New Application page in JarvisEnroll.

### **What happened to the second button in the Primary Care Provider (PCP) Search?**

In JarvisEnroll, there is one button to initiate the search and it will automatically assign the PCP without the additional step.

### **Why is there not a signature area under "In-person Signature?"**

When choosing the "In-person Signature" option for the consumer to sign, the signatures are taken by an attestation and review of the application by a link. The process is to read the

attestation, click on the link to review the application and then have the consumer check an additional attestation that the consumer reviewed the application. This will input the signature dates.

### **Is there a “Submit and Begin Shared Residence” option?**

JarvisEnroll will not have this option.

### **Why are the “Send Applicant an Enrollment Receipt” and “Send Agent an Enrollment Receipt” options gone?**

These additional steps are no longer needed. An email will automatically be sent to the consumer if their email address was entered on the application. Consumers are encouraged to use the UnitedHealthcare mobile app to track their enrollment application(s). Agents can track their enrollments in Jarvis.