

## 2026 Agent Quick Reference Guide

# Jarvis Applications tab



The Applications page in Jarvis provides a real-time view of your submitted, in-progress and action-needed applications all in one place.

Need more visibility? Quickly search by status to track your applications in real-time and use this information to take action on pended apps if necessary. You can also view applications from the past 60 days and search back up to 12 months, putting your application history at your fingertips.

## Key Features



**Use the filtering capabilities** to quickly find just the information you're looking for. For example, narrow your search by name, date, ID number or state.



**View application status.** Easily check the status of individual applications and track their progress as needed. You have access to both saved (incomplete) applications and submitted applications.



Access and **attach important documents** to help you service applications, like providing missing information.

## What's new on the Application Status tab?

- **A refined Application Status page** provides an efficient experience for agents with additional status information available from the main page, reducing the need to navigate between pages.
- **View Application Status details** with Reason detail and Agent Action helping you support your applications quicker.
- **In addition to information shown on the main Application Status page, you can now view:**
  - Demographic information (application address, phone number, DOB, confirmation number)
  - Rx information (Rx Bin, Rx PCN, and Rx Group) for MA and PDP plans
  - Expanded status details (approval date, signature date, received date, proposed effective date, and termination date-if applicable)



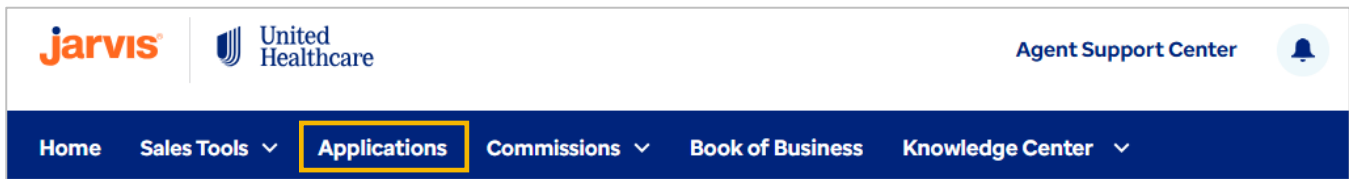


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## How to Access



[Click Here](#) or follow the path to access the Applications tab: *Jarvis > Applications*



Inside the Applications page, you'll see a dashboard displaying your **recent applications**, grouped by status: **Approved**, **Action Required** and **Not Approved**. This status-based view allows you to identify applications that require attention and quickly prioritize follow-up.

[Home](#) > Applications

## Applications



Below the dashboard you will see different tools to sort, filter, and customize your view.

The default table shows the :

- **Applicant Name**
- **Product**
- **Status**
- **Status Reason**

Applicant Name	Product	Status	Status Reason
Last, First	MA	Approved	
	MA	Action Required	Invalid Address Indicated <a href="#">Details</a>
	MDSUP	Denied	Duplicative Plan <a href="#">Details</a>



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On the **Applications** page, you can customize your view by using the tools below:

The screenshot shows the Jarvis Applications page interface. At the top, there are four main tool buttons: **Filter** (with a '0' indicator), **Search Name and Confirmation...** (with a search icon), **Sort by:** (with a dropdown arrow), and **Columns** (with a grid icon). Below these are several dropdown menus for filtering: **Search** (with 'Apply Search'), **Filter By** (with 'Clear All' and 'Apply Filters' buttons), **Status**, **Product**, and **Received Date**. The main table area shows 'Showing 3 of 3 Results' and a table with columns for Applicant Name, Product, Status, and Status Reason. A 'Download Results' button is also visible. A 'Columns' dropdown menu is open, showing a list of columns with checkboxes: Applicant Name (checked), Product (checked), Status (checked), Status Reason (checked), Received, Effective, DOB, State, MBI, AARP, and options for 'Reset to default' and 'Save'.

- ★ Clicking the **Filter** button causes a left-side filter menu to emerge, letting you filter applications by status and product plan, helping make it easy to focus only on the applications you need to view.
- ★ Use the **Search Bar** to locate an application by name or confirmation number.
- ★ The **Sort by** dropdown lets you select how you want your applications sorted. You can sort your entire list of applications alphabetically in either ascending or descending (A–Z or Z–A) order.
- ★ Decide how to display your applications by clicking **Columns**. Your selections on the dropdown are saved automatically and remain in place even if you navigate away from the page. The Applicant Name column is always selected by default.
- ★ Select **Download Results** to export an Excel version of your customized application list.

➤ **Click the > symbol** next to the name of the applicant. If the application is **Incomplete**, you can resume the application where you left off or delete it. For applications with an **In Progress** status, you can resubmit the application or track the Remote Signature status.

Applicant Name	Product	Status	Status Reason
Last, First >	MA	Incomplete	
Last, First >	MA	In-Progress	Remote Signature
Last, First	MA	Action Required	Unable To Assign Election Period

➤ Hover over the **Details** hyperlink to learn more about the status reason:

**Status Reason**

DESNIP ALEXIS - MA - PENDED

Application contains an invalid election period. Please review election period, then contact PHD for further assistance.

**Note:** The > symbol is not available for Approved applications.



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To access **Application Status**, click the Member Name:

Applicant Name	Product	Status
Last, First	MA	Approved

- You will see the application's **Address, Phone Number, DOB, and Confirmation Number.**
- In the upper right corner are the **"Start HA,"** and **"Download App"** buttons. The HA is available for 3 days once the enrollment is submitted and is only available for Special Needs Plan enrollments.
- The **plan name** shows in blue.
- The **Application Status** and **Reason** displays in the orange box.
- Below the status, you will see:

Expanded application status details, such as **Rx information, Approval Date, Signature Date, Received Date, Proposed Effective Date,** and **Termination Date** (plan dependent).

★ **NEW:** If a white box shows within the orange status section, it will provide status **Reason Detail** and **Agent Action** you can take to support the application (dependent on plan and status):

**Note:** If there is no reason detail or agent action generated, status will display in the format below.



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From the Application Status page, click on the **Service Request** tab:

Application Status **Service Requests** Service Request History

On the **Service Request** tab, you can attach documentation to an application to help consumers provide proof of Medicare or Medicaid coverage or verify a chronic illness.

Application Status **Service Requests** Service Request History

**Service Request**

Submit supplemental documentation to provide Proof of Medicare, Proof of Medicaid, or CSNP Verification. Acceptable file types include: JPG, PDF, JPEG, PNG or TIFF.

**Attach document >**

**\*\* For all form submissions allow 5 business days for forms to be reviewed.**

**Attach document** ×

Drag and drop your file here, or **upload your documents**

Only accepts PDF, JPG, JPEG, PNG, TIFF format.  
Upload up to 5 documents, max upload cannot exceed 6MB.

Click **Attach document > upload your documents** to locate and upload documentation, providing missing information in conjunction with an application.

Then **check the box** at the bottom of the page to confirm:

**Your Documents**

- ✓ Proof of Medicare.pdf
- I have confirmed the document(s) I have attached are correct.

The **Service Request History** tab allows you to review any previous service request activity associated with an application.

Application Status Service Requests **Service Request History**

**Service Request History**

Proof of Medicare.pdf	-	05/06/2026 - 3:53 PM CST	-	IN_PROCESS
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**Note:** This tab only appears if there is previous service request activity associated with the application.



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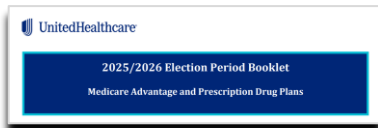
## Agent Resources:



**Application Pend Codes Job Aid** – This is your go-to job aid for quickly looking up pending application status codes, understanding what they mean and determining if any action is needed.



[CLICK HERE](#) or go to Jarvis > Learning Lab > Content Library > Compliance & Enrollment > Enrollment and Election Periods > Application Pend Codes



**Election Period Booklet** – Found on Jarvis, this booklet helps you understand election periods and when a consumer may be able to use an election period for enrolment into a plan.



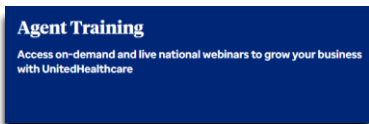
[CLICK HERE](#) or go to Jarvis > Knowledge Center > Reference Guides > Election Period Booklet



**The JarvisEnroll course-** Provides an overview of how to access, complete, and manage your applications.



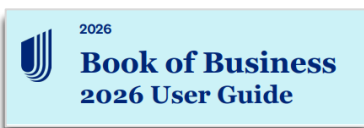
[CLICK HERE](#) or go to Learning Lab > Content Library > (search) JarvisEnroll



**National Webinar Schedule-** To learn more about Jarvis, register for one of our training webinars by clicking “Register Here” next to the training topic.



[CLICK HERE](#) or go to Jarvis > Knowledge Center > Agent Training > National Webinar Schedule



**Book of Business guides-** Learn more about the **Book of Business** section of Jarvis, where you can view further member information with expanded service request options.



[CLICK HERE](#) or go to Jarvis > Knowledge Center > Reference Guides > Book of Business

