

# Online enrollment tool

**jarvisEnroll**



**JarvisEnroll** is UnitedHealthcare's electronic enrollment application tool designed to help simplify and accelerate the enrollment process. It offers a seamless, user-friendly experience for both agents and consumers to help make the enrollment process faster, easier, and more efficient.

## Key Features

- Guardrails are in place to prevent common application errors
- Applications are stored digitally and securely for 10 years
- Can be utilized from the Jarvis app
- Consumers have options to sign via remote signature (text or email), voice signature, and in-person
- The C-SNP verification form is included within the application making the verification process easier by not requiring additional C-SNP verification to be sent with the enrollment
- You can start a new JarvisEnroll Medicare Advantage application directly from your book of business on the member's profile, or from the Medicare Medicaid Lookup tool. Member and consumer information will autofill based on what each tool provides.

## What's New?



On the **Signature Page**, there is an additional field to upload documents to support the enrollment, including proof of Medicare and/or proof of Medicaid before completing the application.



An Address search option is available on the **Applicant Page** allowing agent to find and select a consumer's address rather than typing it in manually.



You can start an application from the **Medicare and Medicaid Eligibility Lookup tool** as well as checking eligibility within the app that could expedite the enrollment process.



The **SSBCI verification** is embedded within the JarvisEnroll application allowing a seamless process for benefit verification. When a plan is selected that requires SSBCI verification, this information will appear on the Questionnaire page.



To access JarvisEnroll: Jarvis > Sales Tools > JarvisEnroll (MA & PDP) or (Med Supp)



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### System Navigation

Once you launch JarvisEnroll, there is a navigation bar at the top with sections that mirror the paper application.



At the bottom of each page, the **Save & Close** button will allow you to save your application where you left off. The **Continue** button will advance you to the next page of the application.



### How to Access

Access JarvisEnroll from Jarvis through single sign-on.

1. Log into Jarvis
2. Click on the **Sales Tools** tab from the homepage
3. Select JarvisEnroll (MA & PDP) or JarvisEnroll (Med Supp) depending on the type of enrollment from the dropdown menu to launch



### Tips For Use



JarvisEnroll functions best using the Google Chrome or Microsoft Edge browser



Keep your email current in Jarvis to receive enrollment and remote signature confirmations



For members switching plans, start a new application from your **Book of Business** to pull member information into the application



Update the Jarvis app from the Appstore to use JarvisEnroll from a tablet or phone

### Additional Resources:

- **JarvisEnroll Job Aids and Guides:** Jarvis > Knowledge Center dropdown > Reference Guides > Sales Tool Guides
- **Self-Paced Course (Learning Lab):** Jarvis > Knowledge Center > Agent Training > Learning Lab
- **Register for a National Webinar:** Jarvis > Knowledge Center > Agent Training > National Webinar Schedule

