

# 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

- All plans are available in JarvisEnroll
- 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

## 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.



**Coming Soon:** The SSBCI verification will be embedded within the JarvisEnroll application allowing a seamless process for benefit verification.



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

