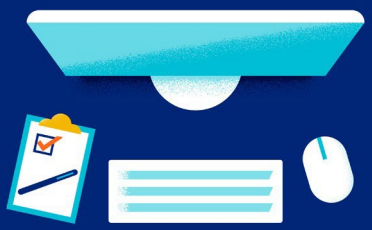
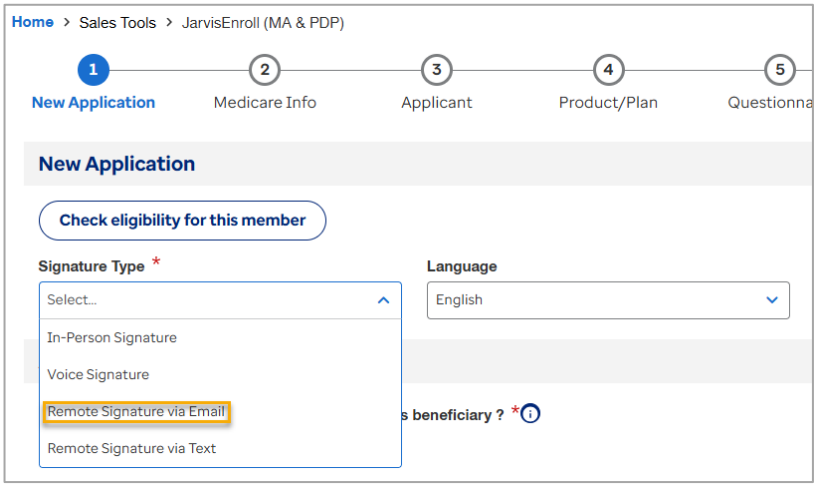
JarvisEnroll Remote Signature Process

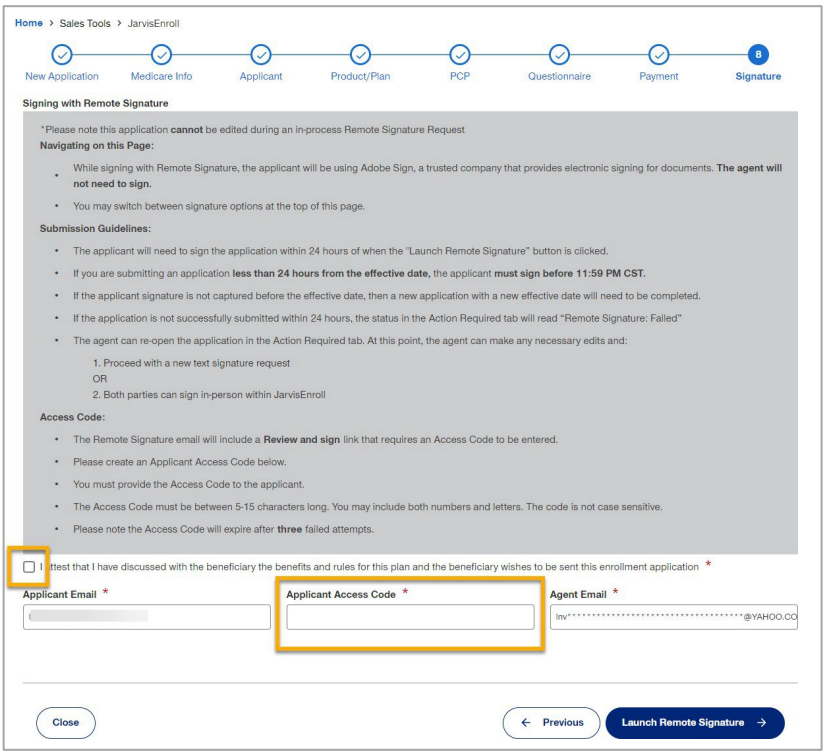


JarvisEnroll allows you to obtain the consumer's signature by remote signature via email or text. Remote Signature applications must be completed within 24 hours of launching the Remote Signature process.

Remote Signature via Email



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.



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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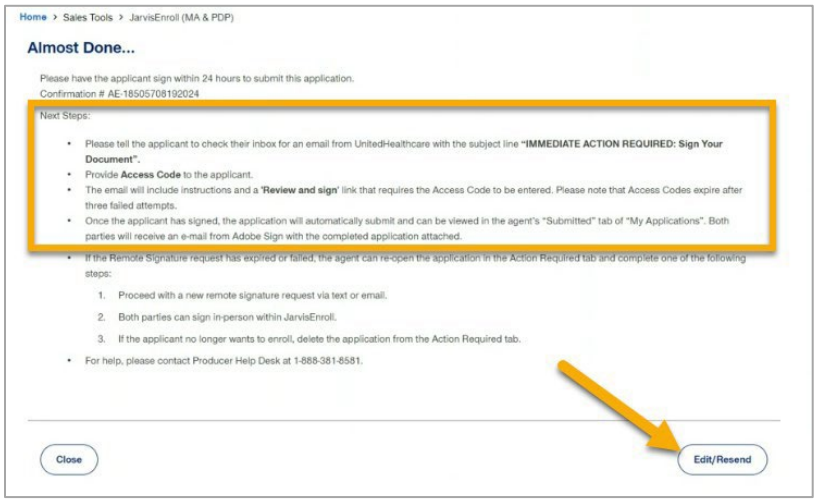


Home > Sales Tools > JarvisEnroll (MA & PDP)

Almost Done...

Please have the applicant sign within 24 hours to submit this application.
Confirmation # AE-18505708192024

Next Steps:

- Please tell the applicant to check their inbox for an email from UnitedHealthcare with the subject line **"IMMEDIATE ACTION REQUIRED: Sign Your Document".**
- Provide **Access Code** to the applicant.
- The email will include instructions and a **'Review and sign'** link that requires the Access Code to be entered. Please note that Access Codes expire after three failed attempts.
- Once the applicant has signed, the application will automatically submit and can be viewed in the agent's "Submitted" tab of "My Applications". Both parties will receive an e-mail from Adobe Sign with the completed application attached.
- If the Remote Signature request has expired or failed, the agent can re-open the application in the Action Required tab and complete one of the following steps:
  1. Proceed with a new remote signature request via text or email.
  2. Both parties can sign in-person within JarvisEnroll.
  3. If the applicant no longer wants to enroll, delete the application from the Action Required tab.
- For help, please contact Producer Help Desk at 1-888-381-8581.

Close | Edit/Resend

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

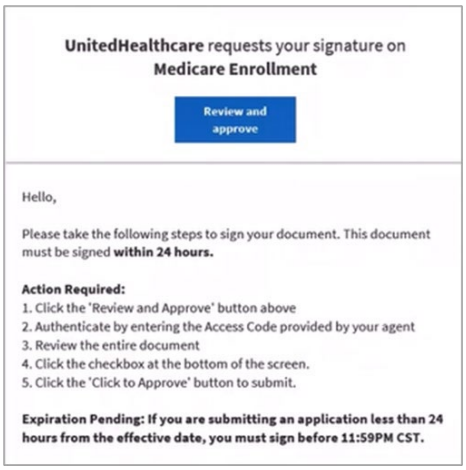
You will need to communicate the next steps to the consumer, so they are aware for what to look for in their email inbox.

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".



UnitedHealthcare requests your signature on **Medicare Enrollment**

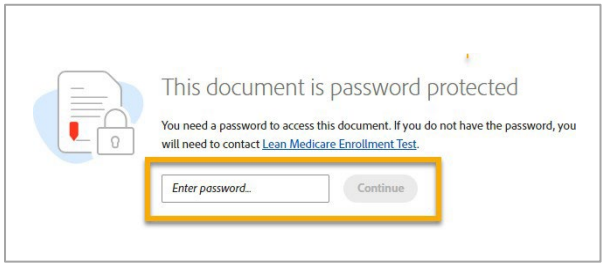
Review and approve

Hello,

Please take the following steps to sign your document. This document must be signed **within 24 hours.**

Action Required:
1. Click the 'Review and Approve' button above
2. Authenticate by entering the Access Code provided by your agent
3. Review the entire document
4. Click the checkbox at the bottom of the screen.
5. Click the 'Click to Approve' button to submit.

Expiration Pending: If you are submitting an application less than 24 hours from the effective date, you must sign before 11:59PM CST.



This document is password protected

You need a password to access this document. If you do not have the password, you will need to contact Lean Medicare Enrollment Test.

Enter password... | Continue

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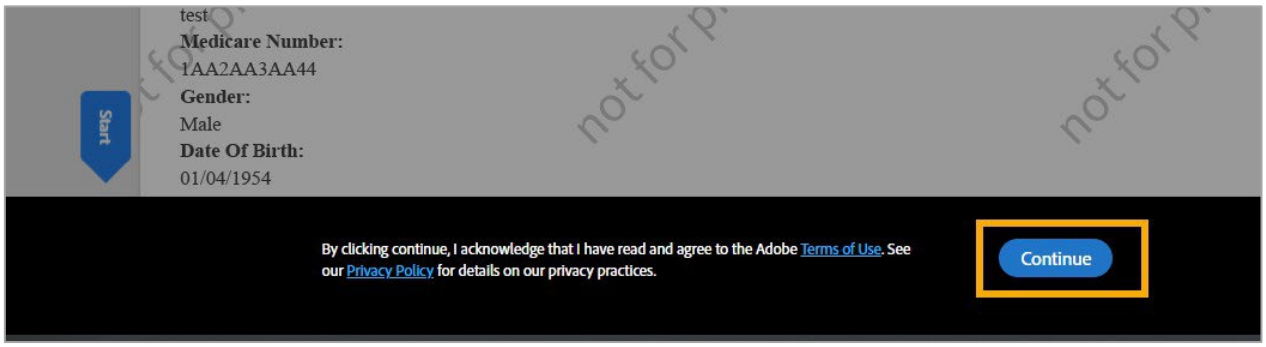
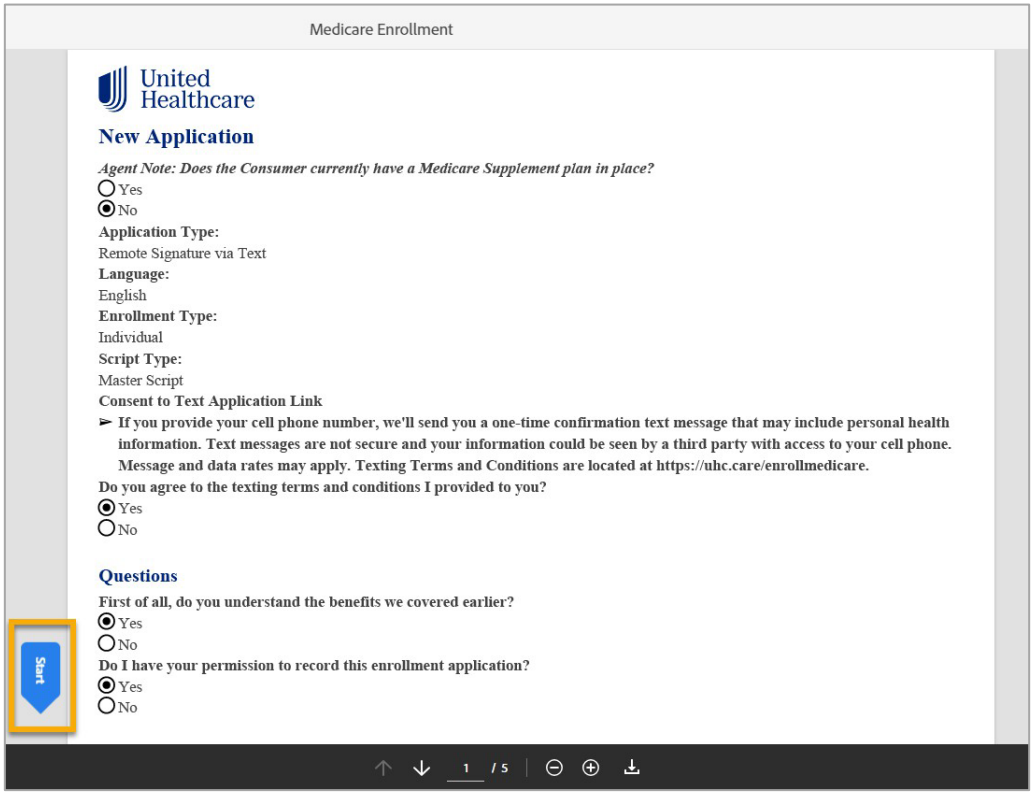
Once the access code is entered, the application will populate, but the consumer will not be able to sign until they select “Continue” .



The consumer 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.



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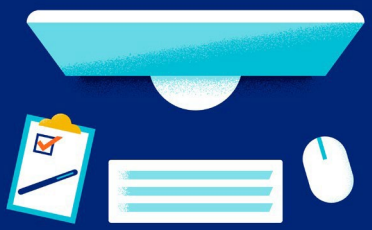
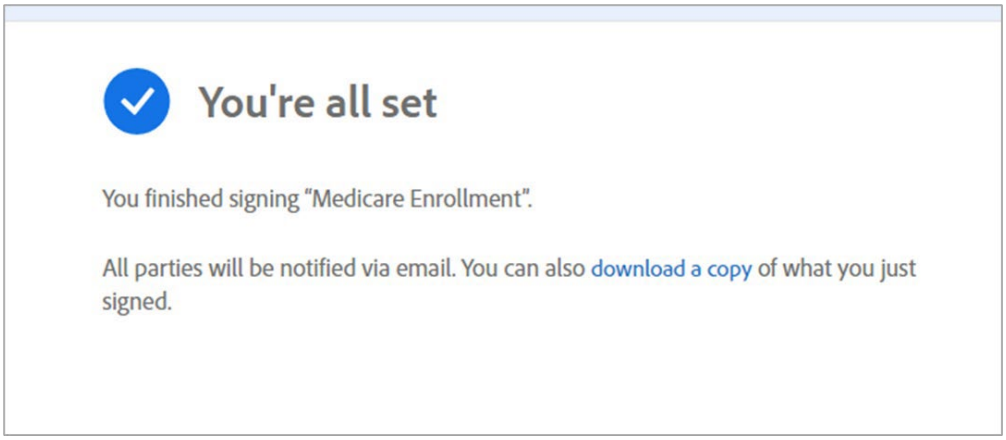


The consumer must check the box that states that they agree to sign the form electronically by using the "Click to Approve" button. They are acknowledging that the information provided on the enrollment application is accurate.

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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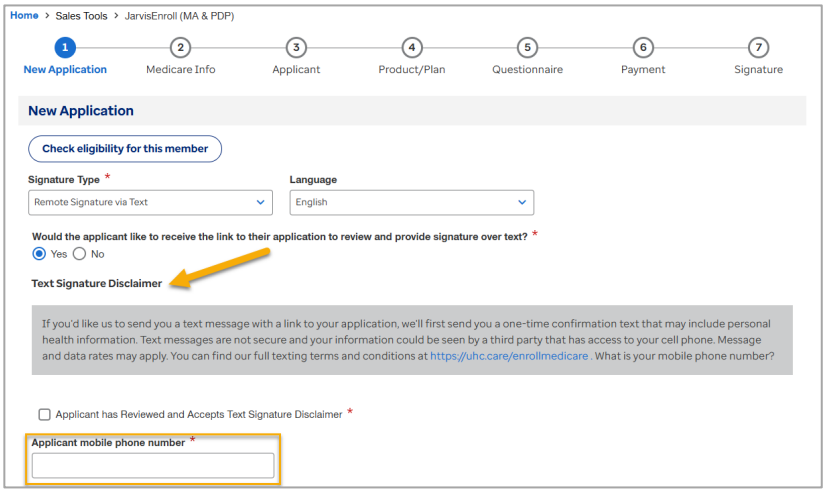
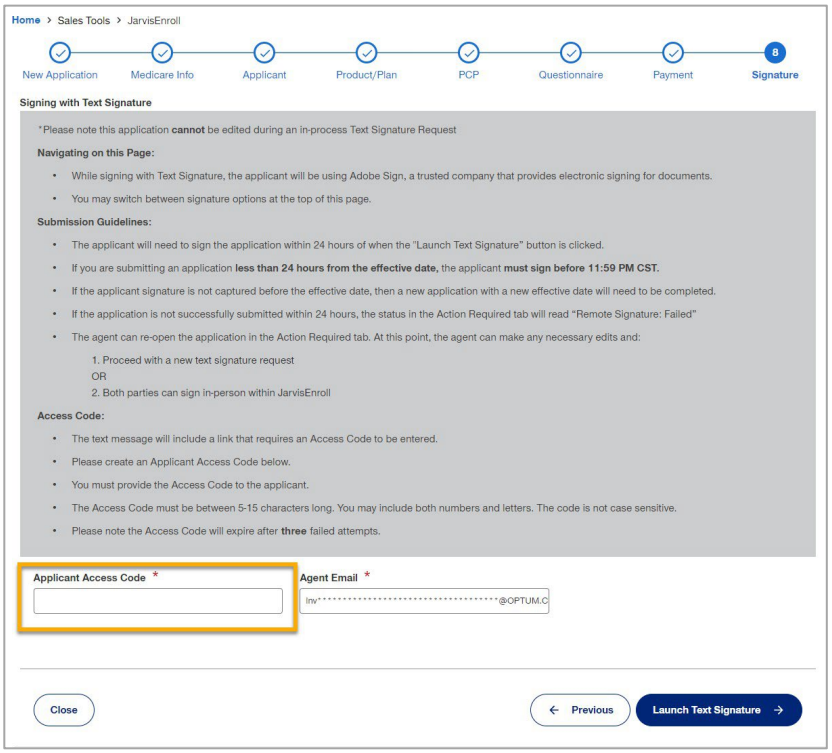
JarvisEnroll Remote Signature Process

Remote Signature via Text



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.



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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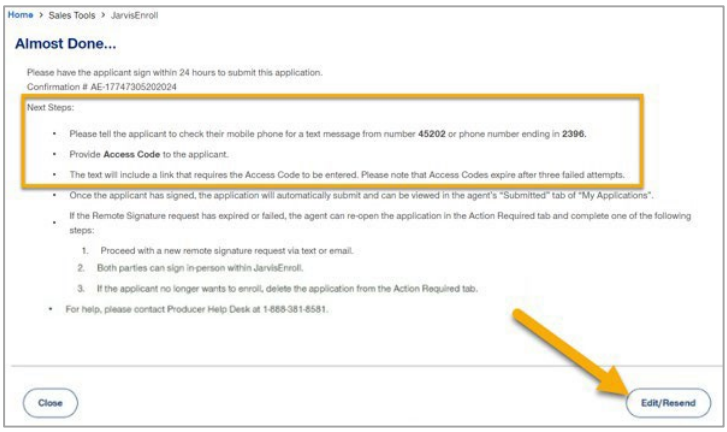
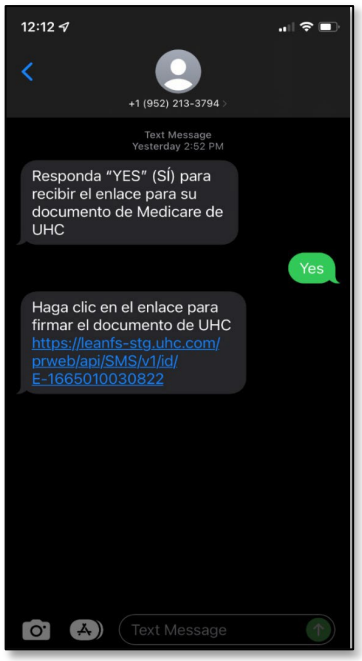


3 The confirmation page will populate after you launch the remote signature process.

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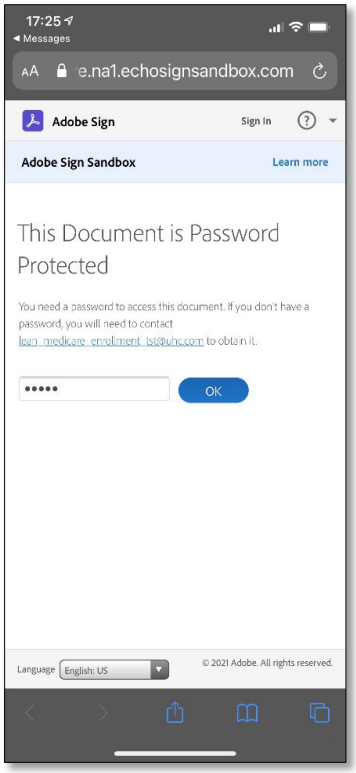
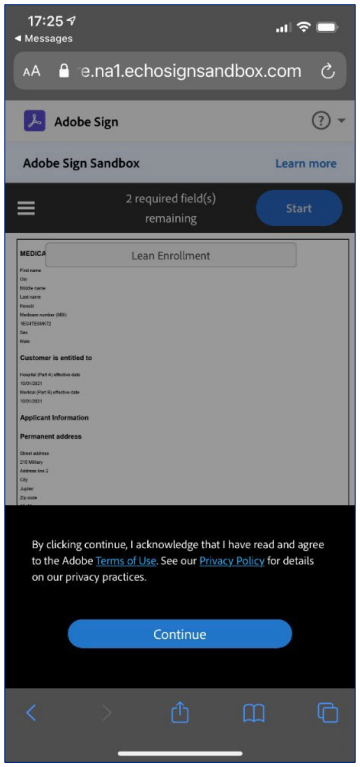
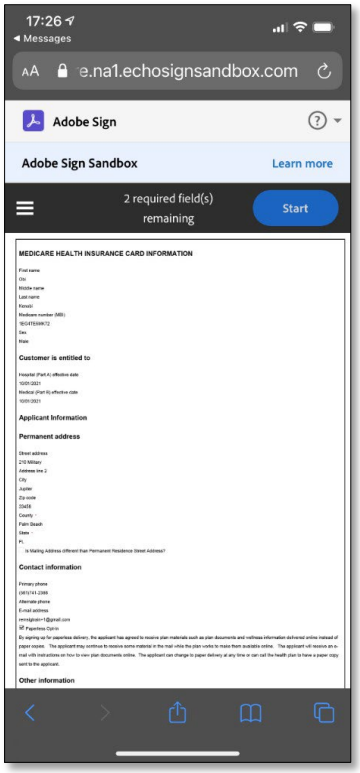
The consumer will be prompted to enter in the access code. This is the code that you and the consumer created.

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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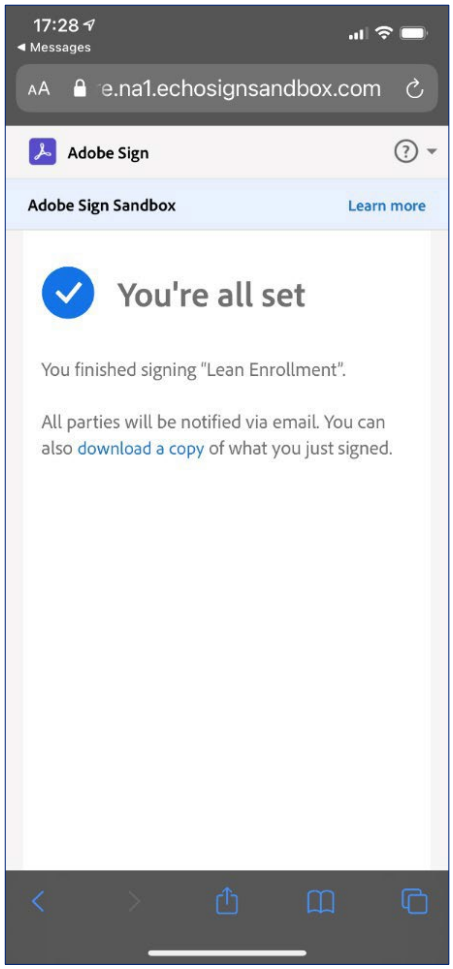
JarvisEnroll Remote Signature Process

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



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