UnitedHealthcare LEAN® User Guide

UnitedHealthcare®

Learning Objectives

- Describe the benefits of using LEAN
- Explain how to access LEAN
- Identify the devices you should use with LEAN
- Understand the steps to complete a Scope of Appointment (SOA) in LEAN
- Understand the steps to complete an MA/PDP application using the LEAN website or mobile app
- Understand the steps to complete anAARP Medicare Supplement application using LEAN
- Locate your saved and submitted MA/PDP and Medicare Supplement applications
- Locate resources you can go to for help

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What Is LEAN?

LEAN is the preferred method of submitting applications because no matter where you are or what time it is, your enrollment experience will be faster, easier, and better.

FASTER	EASIER	BETTER
▪ LEAN automatically determines the appropriate election period when online. ▪ Enrollment receipts arrive in real time! ▪ The provider search directory website is one click away.[1] ▪ Complete applications in less time. ▪ Complete your SOA in LEAN!	▪ Available on mobile tablets and computers. ▪ Signature capture is a touch-enabled part of LEAN. ▪ Same log in as Jarvis! ▪ Can only access applications for the states you are licensed ▪ Guardrails in LEAN ensure more accurate processing	▪ All plans available to enroll via LEAN. ▪ Get signatures remotely after an appointment! ▪ Take applications whether you're online or offline[2]! ▪ Applications and SOAs are stored digitally in LEAN for 10 years.[3] ▪ Helps prevent errors!

[1] Not applicable for AARP Medicare Supplement Plans

[2] Offline is not available for AARP Medicare Supplement Plans

[3] AARP Medicare Supplement Plans online applications are available up to 90 days after submission

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Getting Started

How To Access LEAN

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LEAN can be accessed on a mobile device through the LEAN mobile app. The LEAN app can be used online or offline[1].

The LEAN mobile app is available for download from the Apple App Store or Google Play.

LEAN can also be accessed on browsers via Jarvis or directly at the following URL: https://lean.uhc.com/prweb/PRWebLDAP2/

Log in using your Optum ID credentials.

When using LEAN while online, a stable Wi-Fi connection is recommended. **We do not recommend using a cellular signal or hotspot with LEAN.**

[1] Offline is not available for AARP Medicare Supplement Plans

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Technical Requirements

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Mobile Requirements	Computer Requirements
Agents download the LEAN mobile app on tablets. • **Apple iPad® (iOS 9+) or Samsung Galaxy tablet (OS 4.1+)** • **Access to the Apple App Store or Google Play Store** • **Wi-Fi internet connection** **The LEAN mobile app can be used offline, but an internet connection is required to upload applications or access other resources.**	**Agents may use a computer to access the LEAN website.** • **Mac (OS X) or Windows PC (Windows 7+)** • **Apple iPad®, Android tablet, or Microsoft Surface** • **High-speed internet connection** • **Internet Explorer 11, Safari, Firefox, or Google Chrome** • **Pop-up blockers disabled** **The LEAN website cannot be used offline. All tools in LEAN are available via the website.**

LEAN has been tested specifically on the following mobile devices:

- iPad (3rd, 5th, 6th generation)
- iPad Pro
- iPad Air
- iPad Mini
- Samsung Galaxy Tab S2
- Samsung Galaxy Tab A
- Samsung Galaxy Tab E
- Samsung Galaxy Tab 4

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Signature Requirements

Mobile Requirements	Computer Requirements
Signature capture on the LEAN mobile app is done via: • **Touch input** **Signature capture on the LEAN mobile website is done via:** • **Touch input**	**Signature capture on the LEAN website for MA/PDP is done by:** • **Touch input** • **Mouse** **Signature capture on the LEAN website for Medicare Supplement is done by:** • **Touch input** • **Mouse** • **Signature pad** • **Voice signature (in select states)**

If you use a Topaz signature pad for Medicare Supplement applications, you need to download and install the SigWeb plugin from Topaz: http://www.topazsystems.com/Software/sigweb.exe

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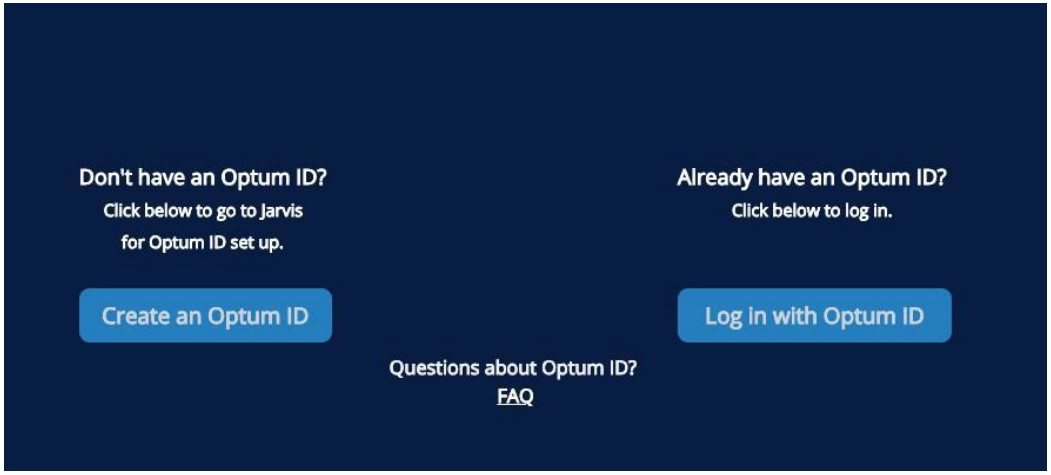
Signing Into LEAN

- Open the LEAN mobile app or the LEAN URL

- You will log in using the same Optum ID credentials you use to log into ***Jarvis***.
  - If you have not yet created an Optum ID, click **Create an Optum ID**.
  - If you already have an Optum ID, click **Log In with Optum ID**.



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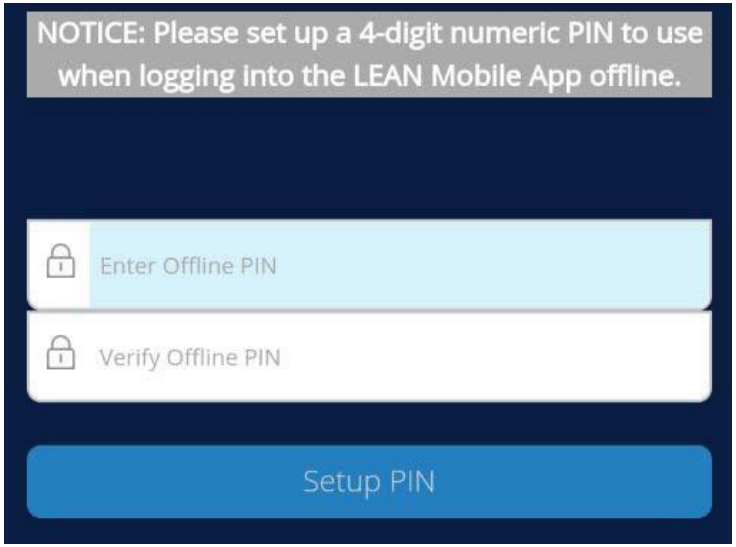
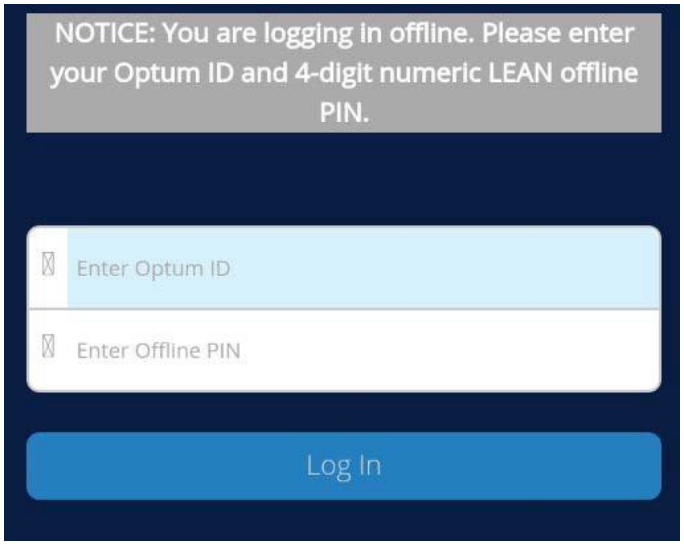
Creating Your Offline PIN

1. The LEAN mobile app will require you to set up an offline PIN the first time you log in online.
- Create your 4-digit numeric PIN and click **Set up PIN**.



2. You will use the PIN you created when you log in offline.

Note: You cannot use your email address to log in offline.



You can change your PIN anytime you are online using the **Reset Offline PIN** button on the Home Page.

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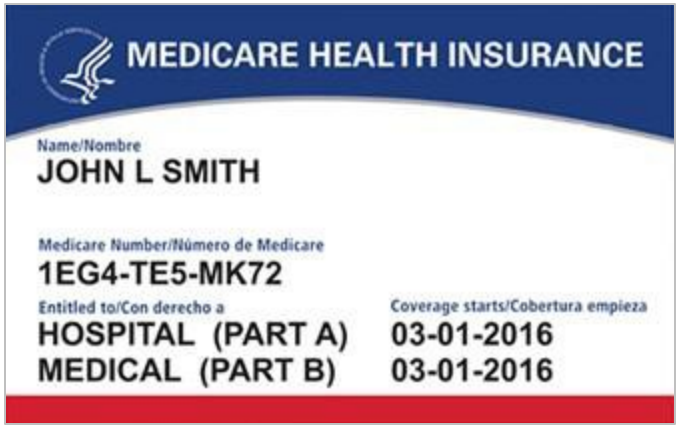
Before You Begin

Things to know before starting an MA/PDP application in LEAN:

- ✓ The mobile app can be used online or offline; the website is only online
- ✓ You need to be online in order to use:
  - ✓ The provider search website
  - ✓ Automated election period logic
  - ✓ Remote signature
- ✓ Members do not need an email to enroll, but do need an email for:
  - ✓ Receiving an enrollment receipt
  - ✓ Opting into paperless document delivery
  - ✓ Remote signature
- ✓ Download a completed application as a PDF



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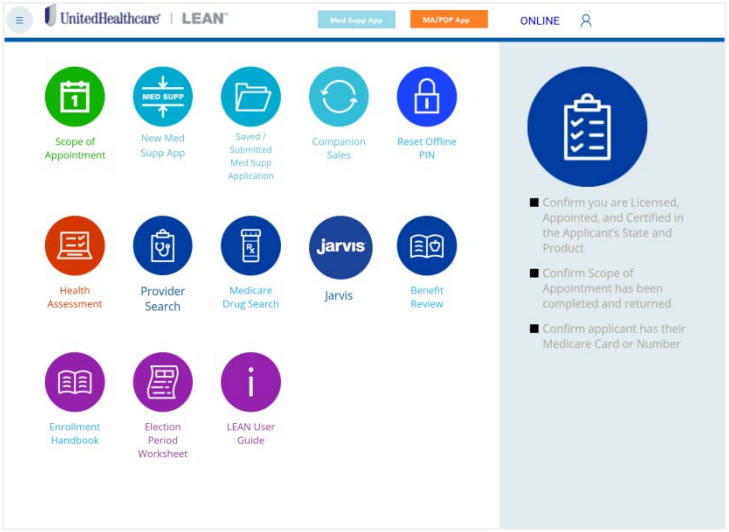
Home Page

- Begin a new application using the orange (MA/PDP) button across the top.
- Begin a Scope of Appointment using the green button in the upper left.
- You can note if you're online or offline according to the indicator in the upper right.
- Your name also displays in the upper right.
- Helpful resources are available behind the buttons on the Home Page.
  - Teal buttons are for AARP Medicare Supplement applications and Companion Sales.
  - Blue buttons are hyperlinks to other sites that you need to be online for.
  - Red button links to the Health Assessment survey.
  - Purple buttons are PDF enrollment materials you can access online or offline.



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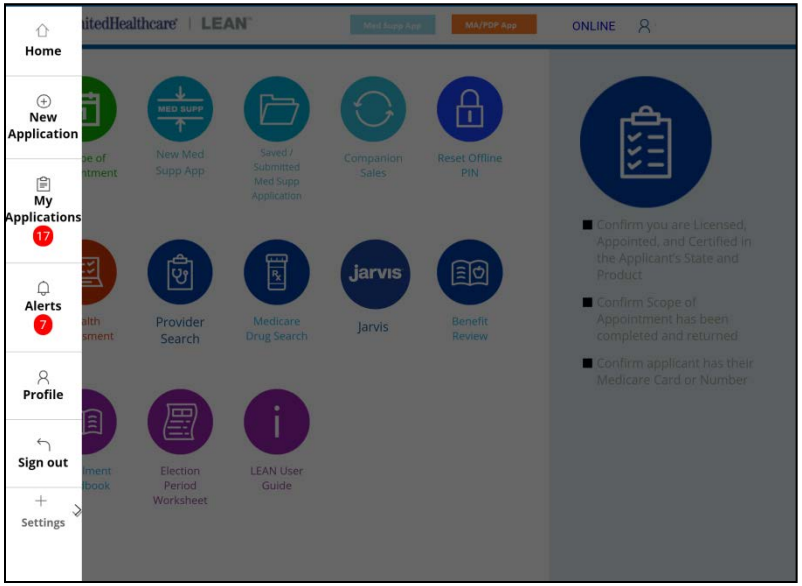
Home Page

- Press the hamburger button in the upper left to access a navigation bar of additional buttons.
- New Application opens a new MA/PDPapplication.
- The My Applications button is where your SOAs and MA/PDP applications are stored in LEAN.
- The Alerts section contains important information you may need to know.
- The Profile section will display your name, licenses, and certifications.
- Sign Out is how you log out of LEAN.



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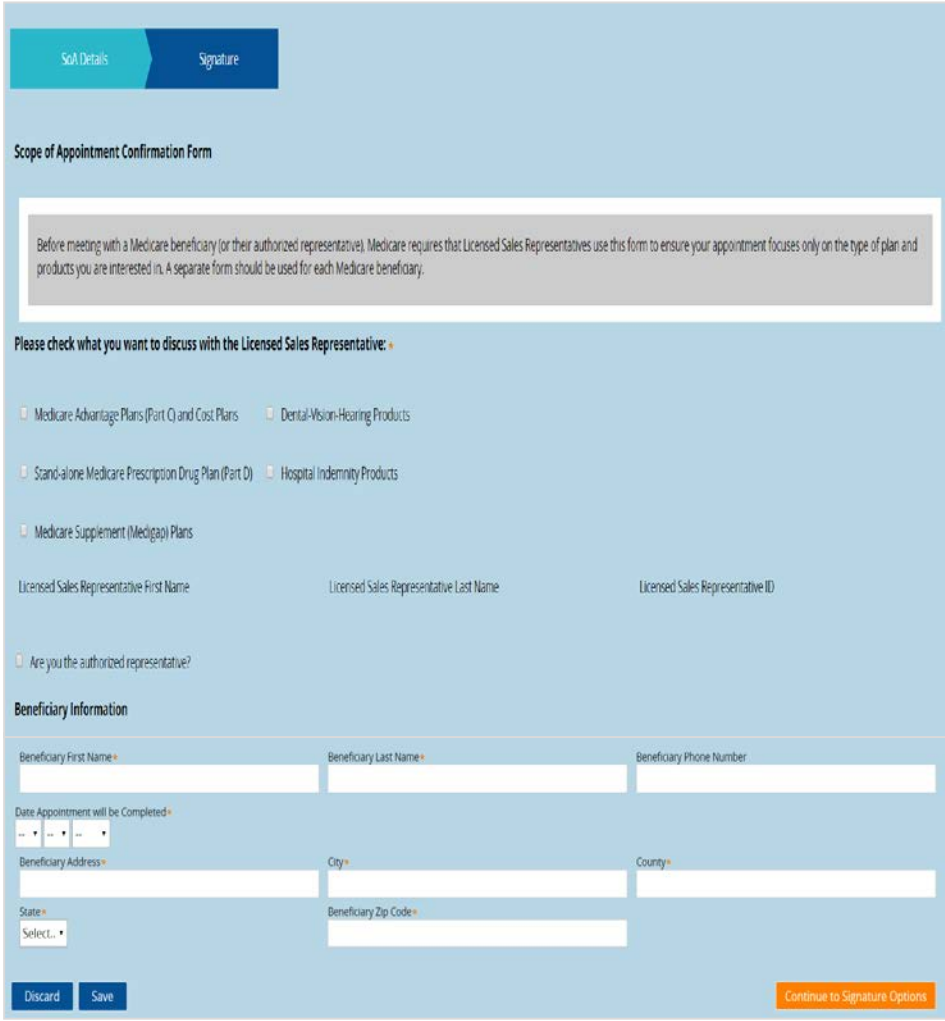
Completing an Electronic Scope of Appointment (eSOA)

Scope of Appointment Form

- The first page of the Scope of Appointment is the details form.
- All required fields must be completed.
- A product type must be selected.
- Your agent information will be automatically populated.
- There is no zip code/county/state logic built into the scope form. You will need to manually enter those selections.
- Discard will delete the eSOA.
- Save will save it to My SoA Confirmations to return to later.
- The orange Continue button will advance the eSOA.



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Scope of Appointment Signature

- The second page of the eSOA is the Signature page.
- At the top of the signature page are two options:
  - Sign in LEAN now
  - Sign via email with Remote Signature
- By default, “Sign in LEAN now” is selected.
  - This option is the standard signature option using a mouse or touchscreen.
- If you select “Sign via email with Remote Signature”, the signature page will change for the remote signature process. The Remote Signature process is is covered on page 30.
  - The “Sign via email with Remote Signature” option is not available offline.
- After signing and using the “Complete SoA” button, you will get a confirmation screen with a “S” confirmation number for your completed eSOA.

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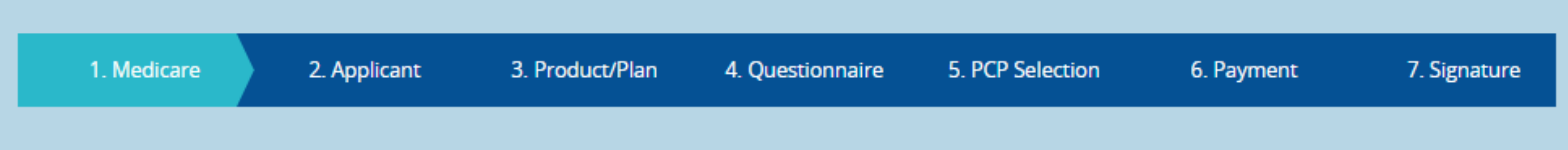
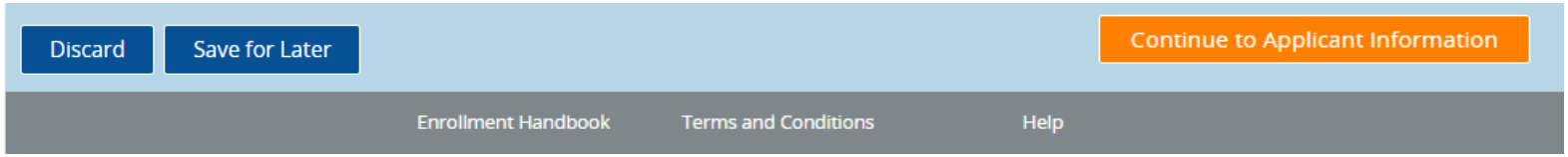
Completing a MA/PDP Enrollment Application

Navigation



- Every page in the eSOA and MA/PDP application has navigation across the top.
  - As you advance through the application, click on any teal-colored button to return to that page of the application.
  - You cannot jump forward.
  - Required fields are marked with an orange asterisk.

- Every page in the eSOA and MA/PDP application has helpful PDF tools across the bottom.
  - The Enrollment Handbook opens the Enrollment Handbook.
  - Terms and Conditions opens the Terms and Conditions for you to review.
  - Help opens the LEAN User Guide.



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Medicare Page

- The first page of the application is the Medicare Information page.
- The Medicare Number field will accept both Health Insurance Claim Numbers (HICNs) and Medicare Beneficiary Identifiers (MBIs).
- The Medicare Number field has logic built in to ensure you correctly enter the MBI.
- Discard will delete the application.
- Save for Later will save it to My Applications to return to later.
- The orange Continue button will advance the application.

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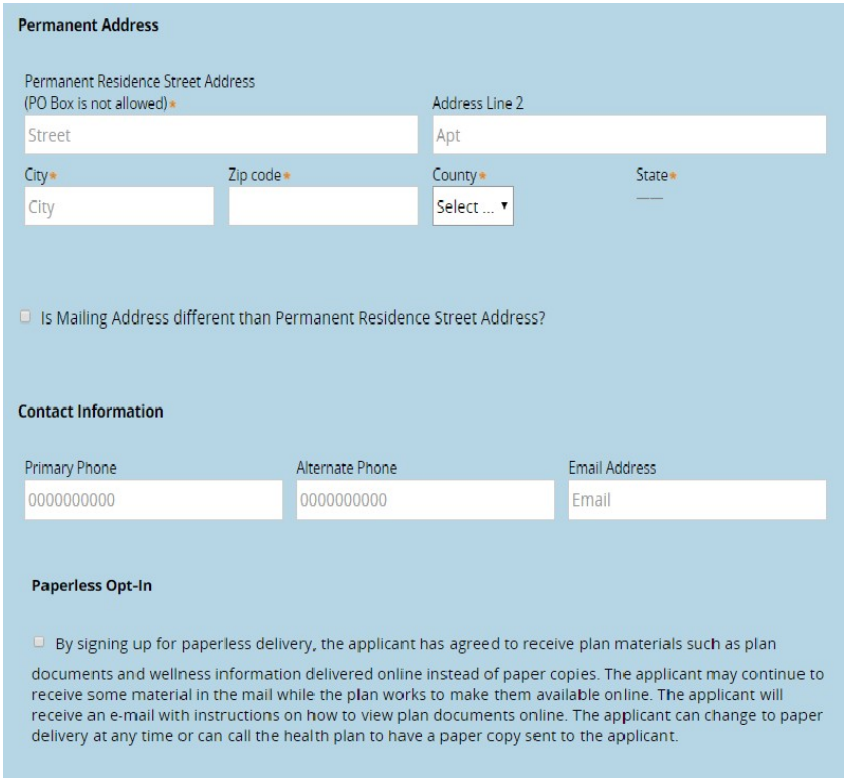
Applicant Info

- The second page of the application is the Applicant Info page.
- Once the zip code is entered, the available county options will automatically populate in the County field.
- Once a county is selected, the state will automatically populate.
- If the member has a separate mailing address, enable the checkbox to open the optional Mailing Address fields.
- The Email Address field is optional unless the Paperless Opt-In is enabled for electronic document delivery.



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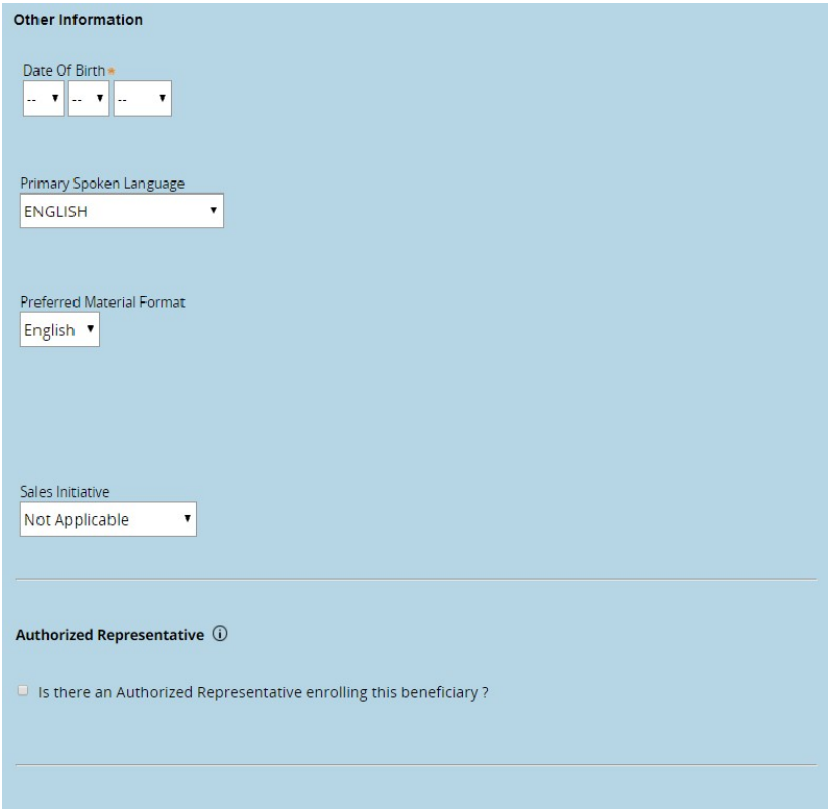
Applicant Info

- Additional optional fields on the Applicant Info page include:
  - Primary Spoken Language
  - Preferred Material Format
  - Sales Initiative
- If the member has an Authorized Representative enrolling them, enable the checkbox at the bottom of the page and complete the optional Authorized Representative fields.



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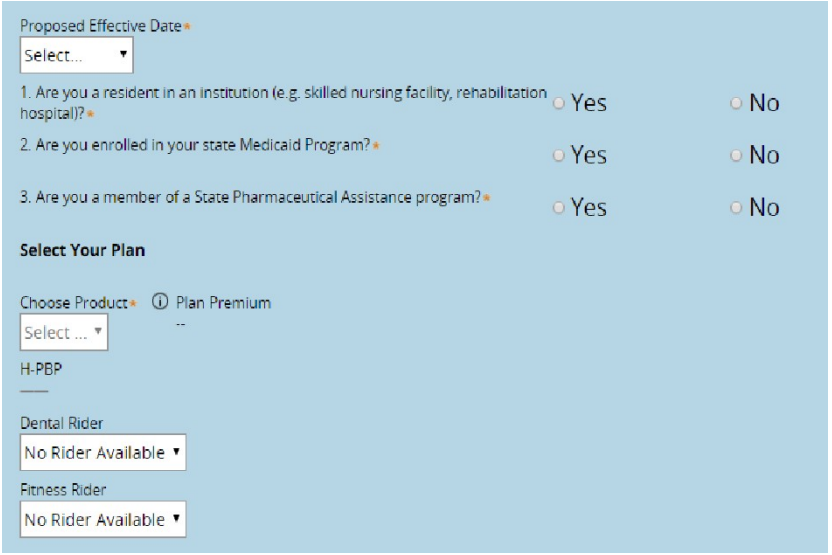
Plan Selection

- The third page of the application is the Product/Plan page.
- The Proposed Effective Date must be selected before the plan options display.
- The Institution and Medicaid questions will open additional required fields if you answer “Yes” to them.
- Only plans for the zip code previously entered will display. The premium and H-PBP will populate automatically when you select a plan.
- If the plan has any riders, those options will open up after the plan is selected.



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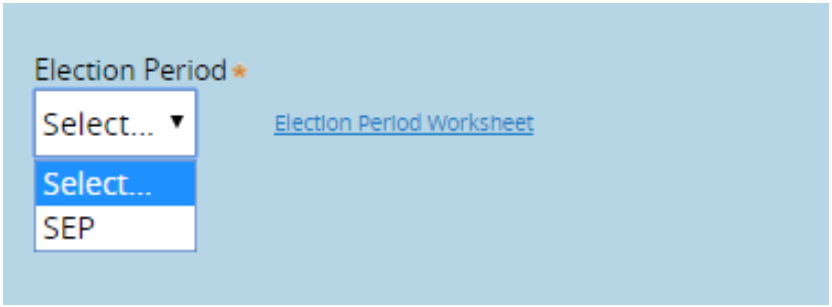
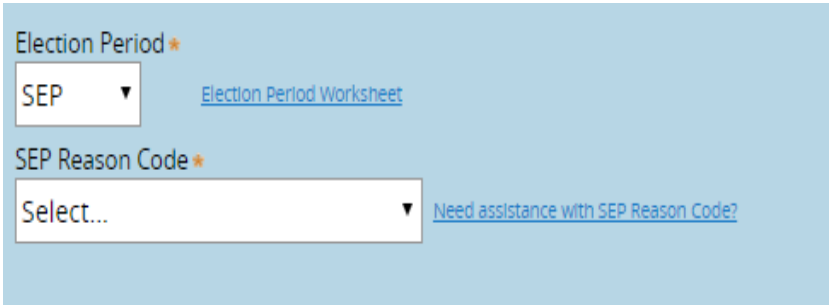
Election Period Selection

- Once the Proposed Effective Date and Product fields are selected, you can choose the Election Period.
- If you are online, the Election Period options will be automatically calculated based on the information you have entered into the application.
- If you are offline, all Election Period options will display. The Election Period Worksheet PDF is available on this page to help you make the correct selection.
- If you select SEP, all SEP Reason Codes will display. The SEP Reason Code field includes a PDF to assist you in choosing the correct selection.





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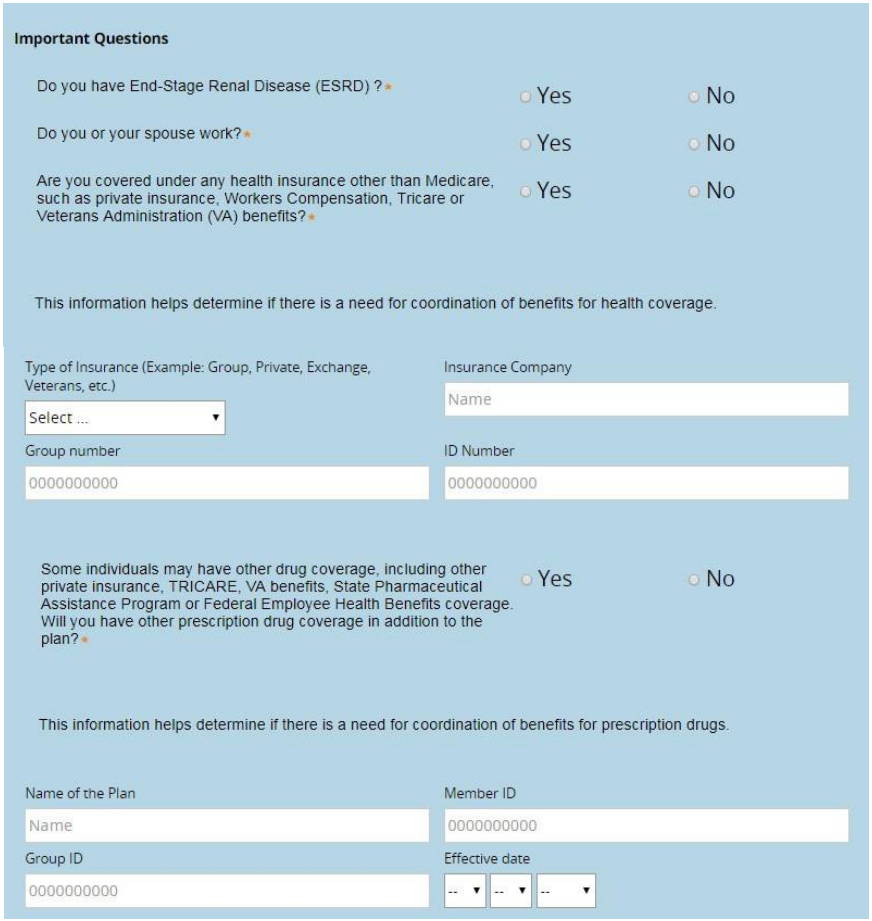
Questionnaire

- The fourth page of the application is the Questionnaire page.
- All questions displayed on this page are required.
- If you answer Yes to the Other Health or Other Drug Coverage questions, the open entry fields may become required.
- Please note that these fields have character limitations.



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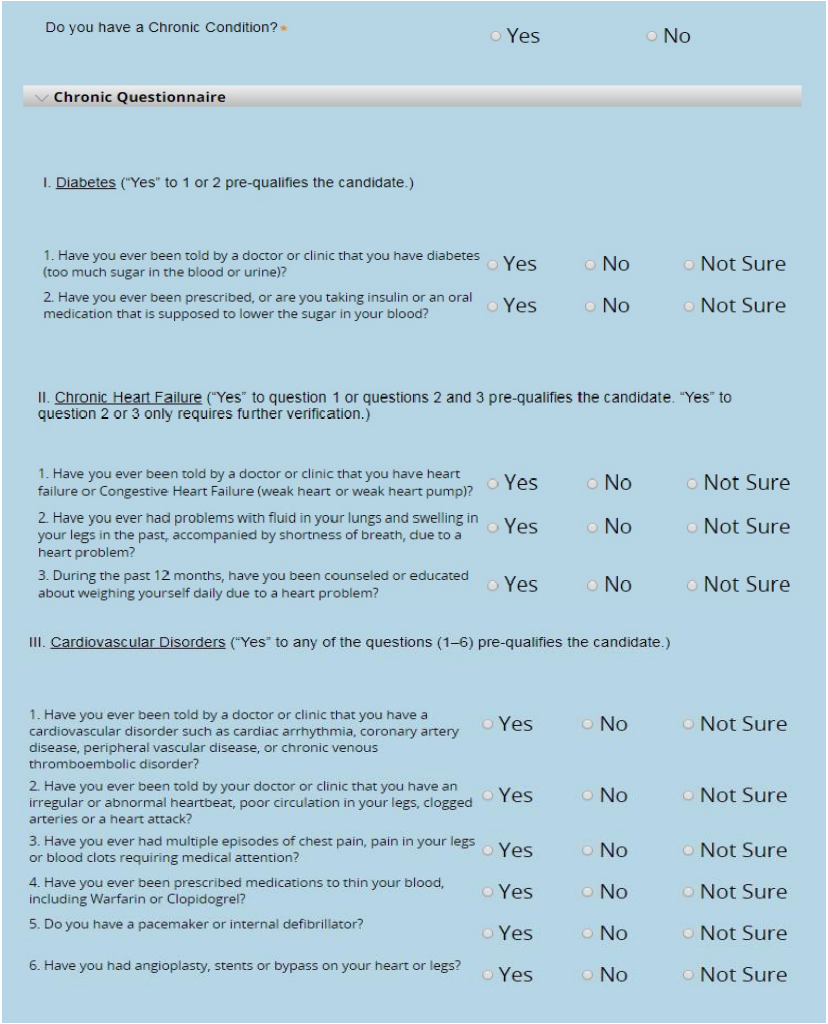
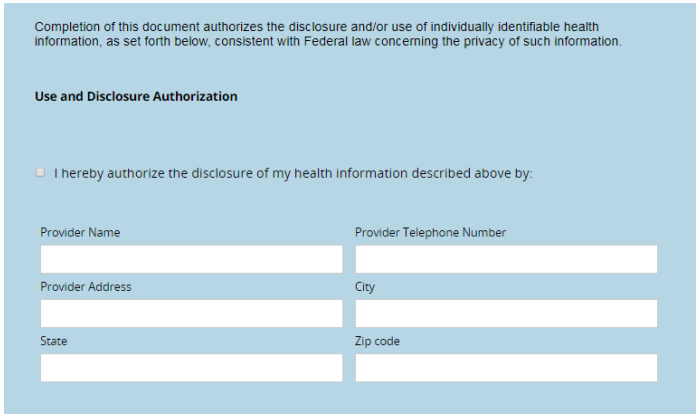
Chronic Questionnaire

- If you have selected a Chronic Special Needs Plan, the Questionnaire page will include the Chronic Questionnaire.
- All questions on this page are required.
- You must answer “Yes” to the initial Chronic Condition question. If you answer “No”, you will not be able to answer the other questions.
- The member’s physician information must be entered at the end for verification purposes.





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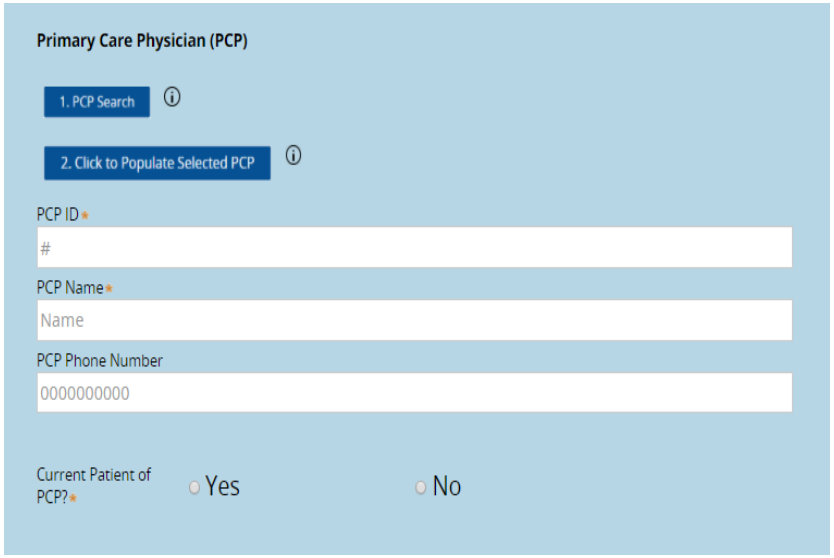
Primary Care Provider

- The fifth page of the application is the PCP Selection page.
- The PCP ID, PCP Name fields and Current Patient question are required.
- If you are online, you can use the PCP Search button to search for a provider on the Rally website.
- After navigating the Rally website and selecting a provider, the Click to Populate Selected PCP button will import the provider information into LEAN.
- If you are offline, you will need to enter PCP information manually into the fields. The PCP Search buttons are not present offline.



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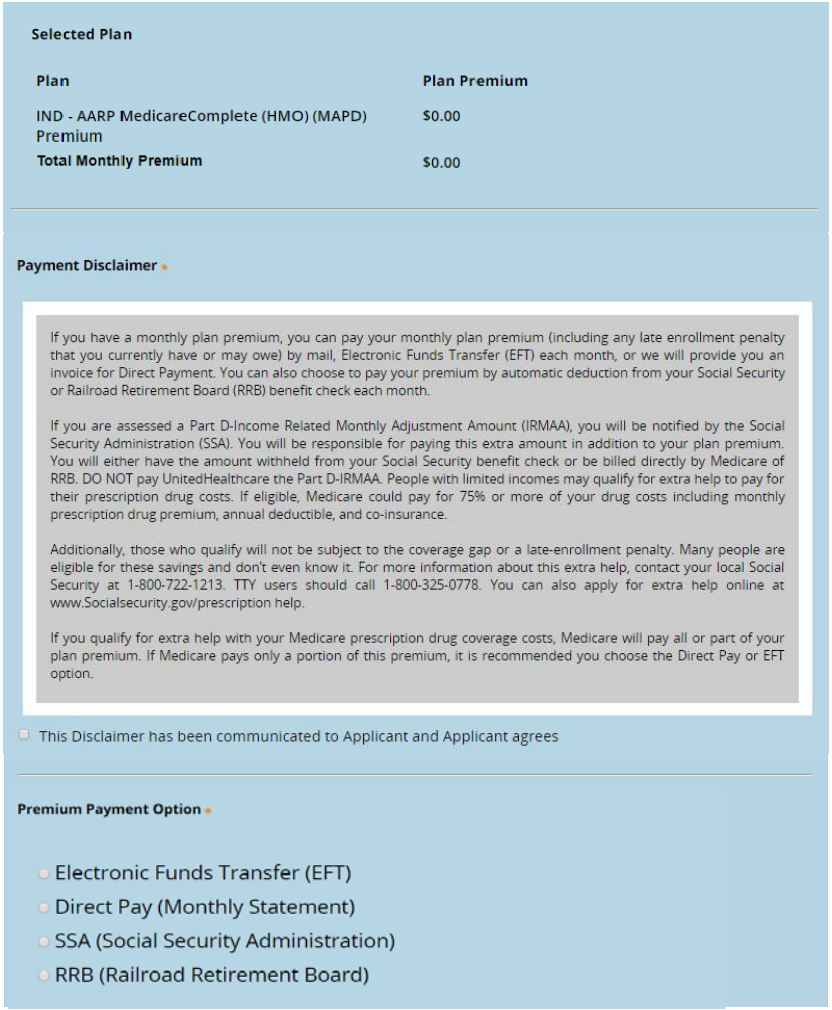
Payment Page

- The sixth page of the application is the Payment page.
- At the top of the page, you can review the plan chosen and the premium.
- The Payment Disclaimer must be read word- for-word to the member, or the member must be given time to read it and accept the corresponding checkbox.
- LEAN offers 4 payment options for MA/PDP plans.
  - Electronic Funds Transfer
  - Direct Pay
  - SSA
  - RRB
- Additional required fields and/or disclaimers may open depending on the choice made.
- Additional disclaimers must be read word- for-word to the member, or the member must be allowed to read and accept it.



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Signature Page

- The seventh page of the application is the Signature page.
- At the top of the signature page are two options:
  - Sign in LEAN now
  - Sign via email with Remote Signature
- By default, “Sign in LEAN now” is selected.
  - This option is the standard signature option using a mouse or touchscreen.
- If you select “Sign via email with Remote Signature”, the signature page will change for the remote signature process.
  - The “Sign via email with Remote Signature” option is not available offline.

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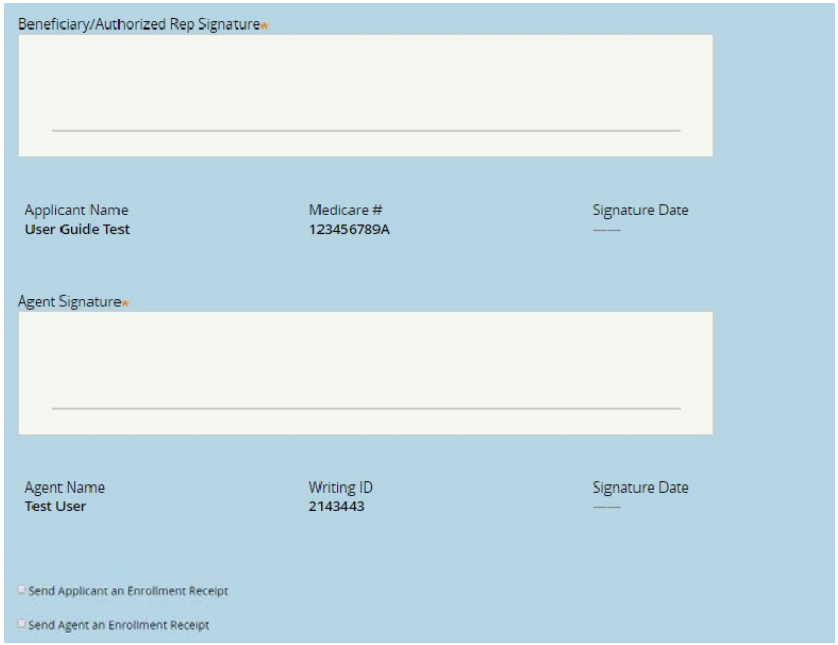
Sign in LEAN Now

- Both the applicant and agent must sign his or her own name.
- The signature can be done two ways:
  - Using a mouse on a PC
  - Using a touchscreen PC or tablet
- After entering a signature, the Accept and Clear options become available.
  - Accept saves the signature and populates the Signature Date
  - Clear erases the signature so you can start over.
- You may also enable the checkbox to send the applicant or yourself an enrollment receipt. If you do, you must read the enrollment receipt disclaimer to the member.
  - Never enter your email address as the member's email address.



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Shared Residence

- When using the LEAN website, you have the option for a Shared Residence Application.
- After enabling the Shared Residence Application checkbox, you will be able to choose which fields to duplicate in the second application.
- Use the “Select All” option if you want all fields duplicated.
- The second application will not open immediately, but will appear at the top of your list of Not Complete applications in My Applications.

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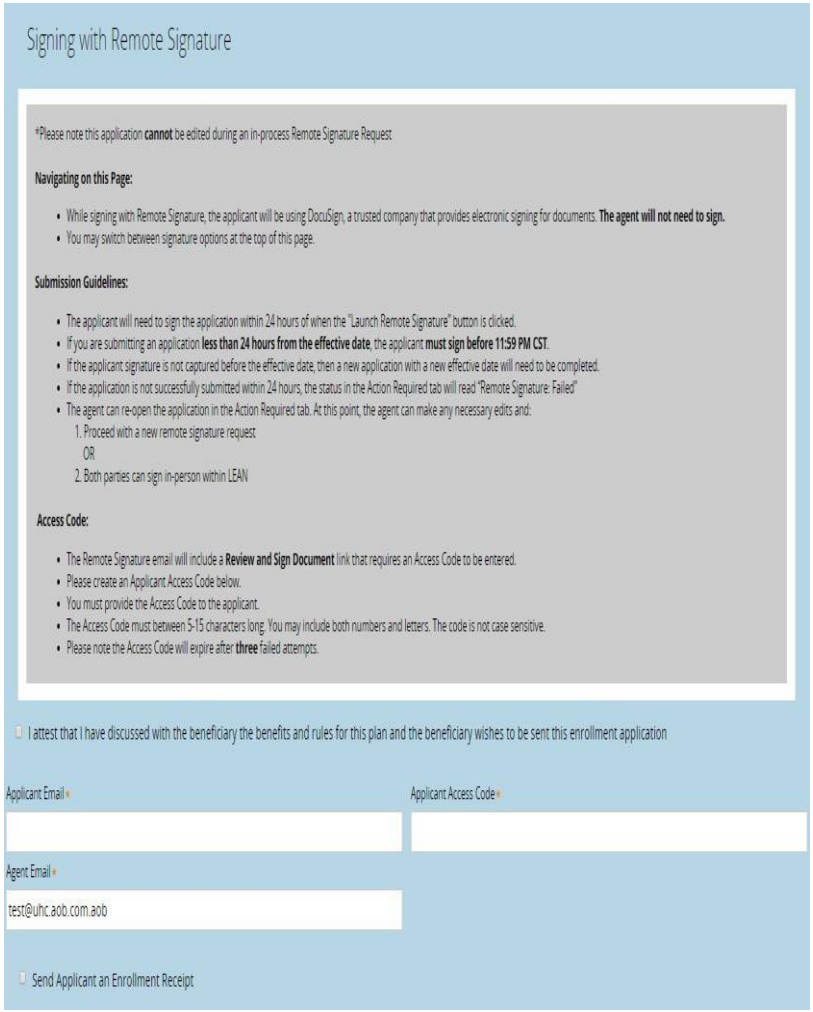
Remote Signature

- When using the remote signature option, the Statement of Understanding will be replaced with instructions specific to the DocuSign remote signature process.
- You will not sign an application completed by remote signature.
- The applicant email is required for the remote signature process so they can receive the DocuSign email.
- The agent email is also required.
- The access code is agreed upon by you and the applicant and must be entered on this page. The applicant will use this code during the DocuSign remote signature process.



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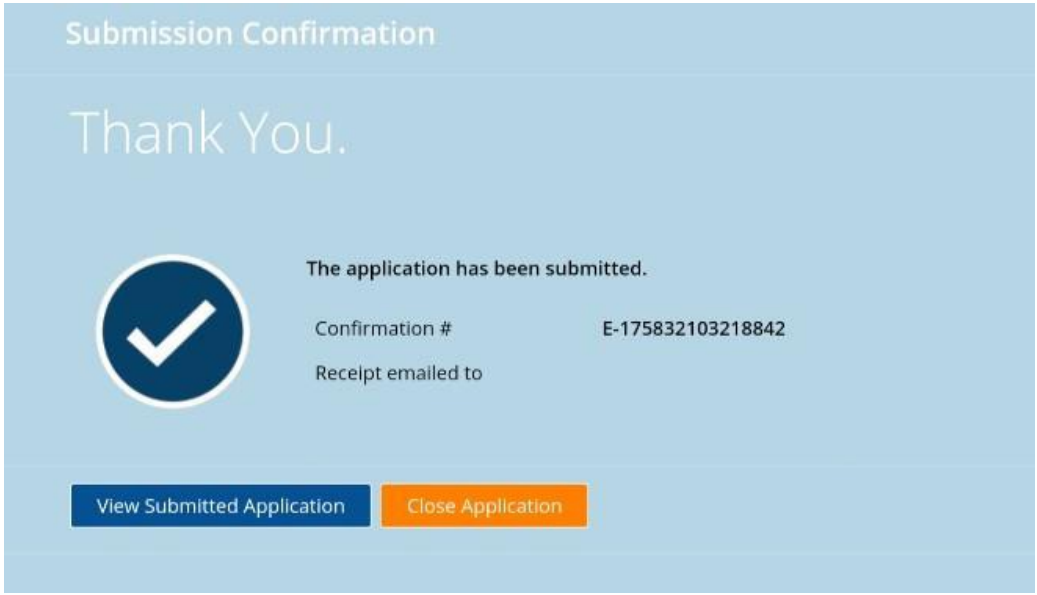
Online Submission Confirmation



- When an application is completed online, the online Submission Confirmation screen finishes the process.
- If you took a PDP application, you will have a button to start a Medicare Supplement application with the applicant's data from the PDP application pre-populated.
- This screen has your confirmation number and the email address where an enrollment receipt was sent.
- You may view the submitted application, the enrollment receipt, or close the application.

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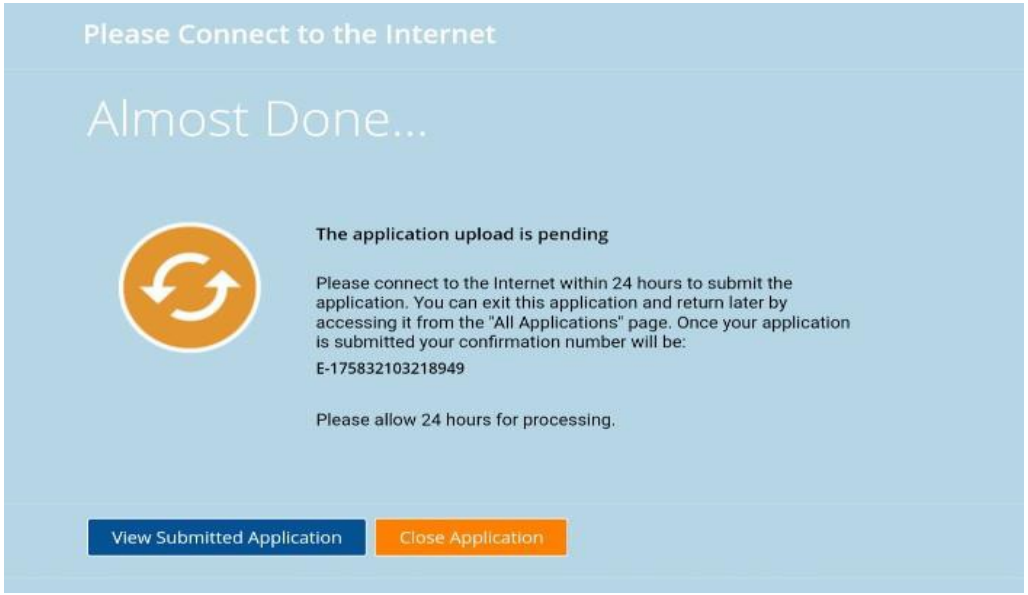
Offline Submission Confirmation



- When an application is completed offline, the offline Submission Confirmation screen finishes the process.
- This screen has your confirmation number and a reminder to upload the application within 24 hours.
- You may view the submitted application, the enrollment receipt, or close the application.
- Remember to always double-check your application is Submitted in My Applications.

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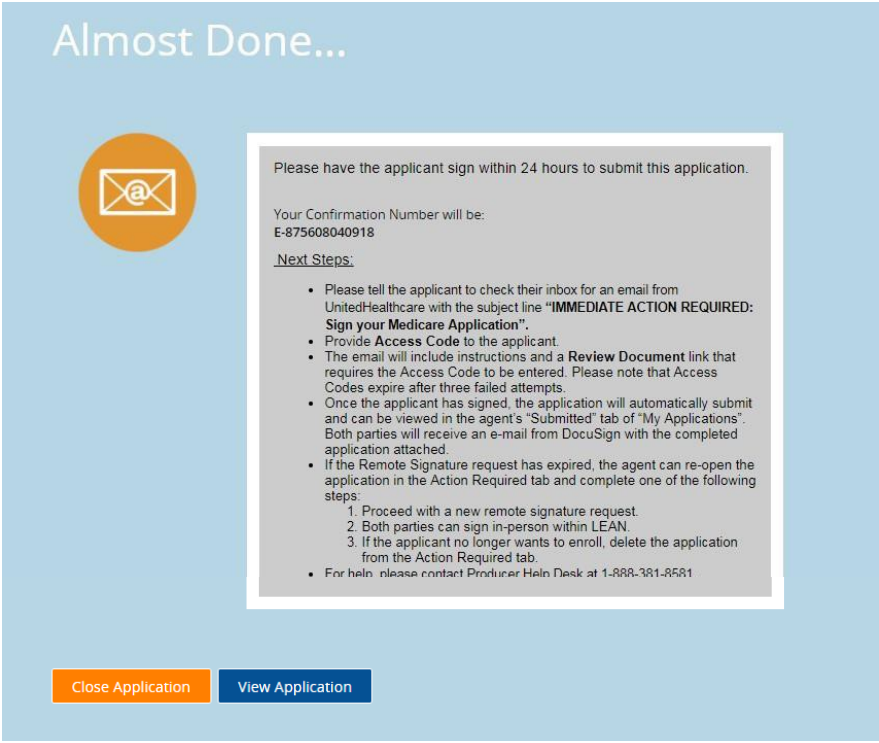
Remote Signature Confirmation

- When an application is completed using remote signature, the remote signature Submission Confirmation screen finishes the process.
- This screen has your confirmation number and instructions on the remainder of the remote signature process as covered previously.
- You may view or close the application.
- This does not mean your application is submitted! The applicant still has to complete the Remote Signature steps to sign and submit the application.



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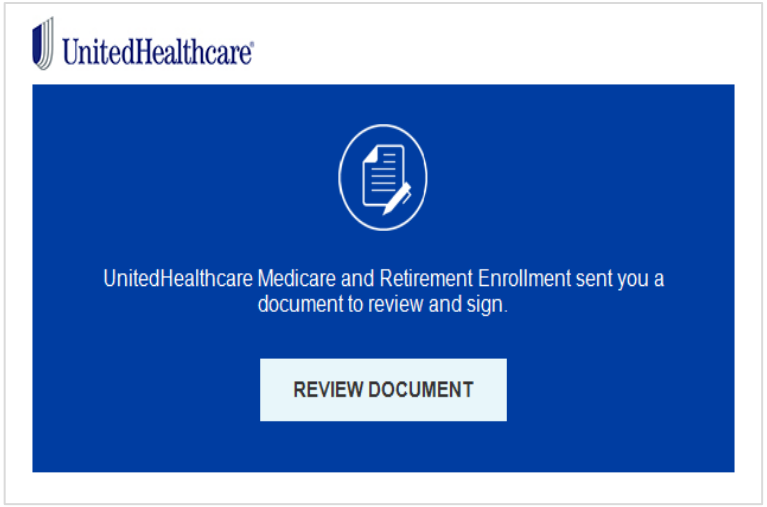
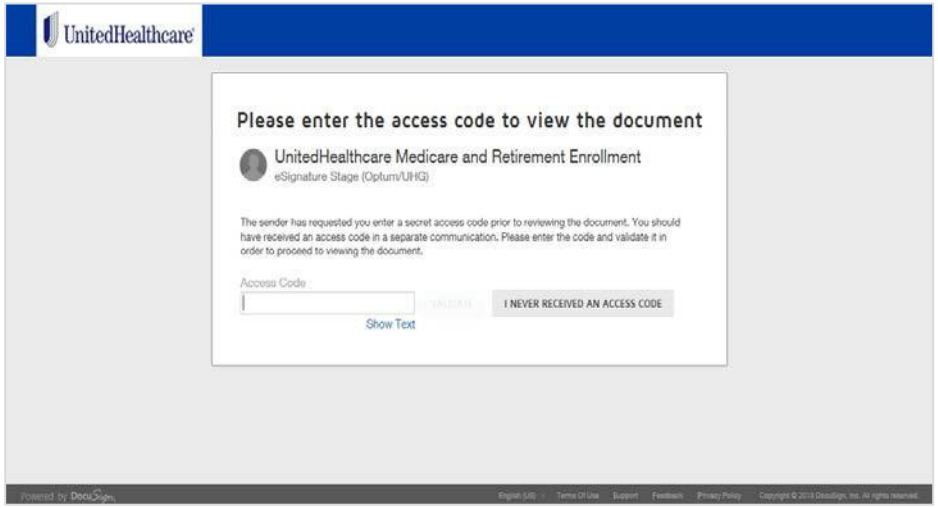
Remote Signature

- After completing the remote signature process in LEAN and submitting the application, the applicant will receive an email from DocuSign instructing them to review their document.
- The DocuSign email also includes instructions to the applicant to complete the process.
- The applicant has 24 hours to complete the DocuSign remote signature process.
- After clicking Review, the applicant will be sent to the DocuSign website.
- The applicant will have to enter the previously agreed upon Access Code.
- If the applicant forgets the code, you are able to see it by viewing the applicant's application in LEAN.





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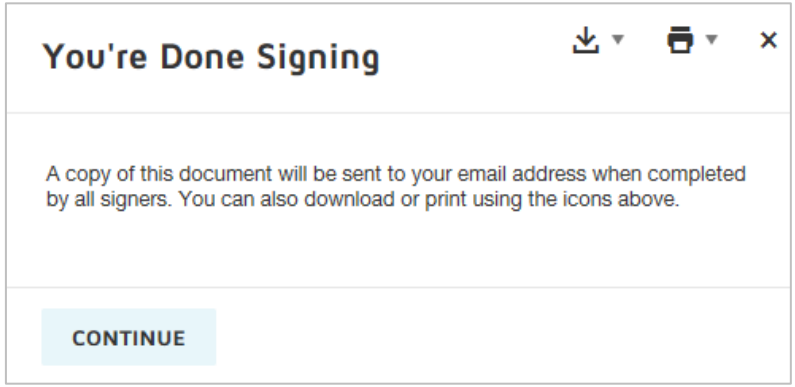
Remote Signature

- After entering the access code, the applicant will be presented with a copy of their application.
- Two “Sign” buttons will be on the application to be signed and initialed. Clicking on those buttons will prompt the applicant with signature options.
- NOTE: Interacting with other areas of the DocuSign site may direct the applicant away from the signing process and result in failure.
- After signing both buttons, the applicant should click Finish to complete the process.
- The applicant will be notified that they’re done, and both applicant and agent will receive an email from DocuSign.
- If the applicant fails to complete the application, you can re-open the application in LEAN and resend the DocuSign request.



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Completing an AARP Medicare Supplement Enrollment Application

Before You Begin

UnitedHealthcare

Things to know before starting a Medicare Supplement application in LEAN:

- ✓ You must be online to take a Medicare Supplement application in LEAN.
- ✓ Be sure to have Adobe Acrobat Reader installed on your device as you will be asked to review all forms (application, EFT form, ancillary forms) in PDF prior to submission.
- ✓ You must provide the consumer with the full AARP Medicare Supplement **enrollment kit** prior to enrollment. The kit must include the "*Choosing a Medigap Policy: A Guide to Health Insurance for People with Medicare.*"
- ✓ Using the enrollment kit, **review** the available plans in your state/area and **quote** applicable rate(s) prior to starting a new online enrollment application.
- ✓ LEAN will display the state-specific enrollment application and associated forms (Replacement Notice, Electronic Funds Transfer Form, and state-specific forms for FL, IL, KY and OH).
  - You must **review** each question and statement with the consumer – either by sharing your computer screen with them, or asking them to read along in the enrollment kit.
- ✓ Before you enter the online enrollment process, **confirm** that the consumer understands and is willing to sign the forms electronically or by voice (if applicable).
- ✓ If the consumer is not an AARP member, **AARP membership** must be purchased either by credit card within the online enrollment tool OR by calling 1-866-331-1964, Monday-Friday 7 a.m. – 11 p.m., Saturday, 9 a.m. – 5 p.m. ET.

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Three Ways to Collect Signatures

UnitedHealthcare

Electronic

- Available in all states
- Via touch screen or Topaz signature pad
  - You must collect consumer signatures in-person

Remote / Digital

- Available in all states
- Via phone and email, DocuSign
  - Consumer must have an email and access to a computer to sign

Voice

- Available in 11 states
- Via phone
- All questions and disclaimers must be recorded via a unique 800#.

- Consumers should be asked their signature preference at the time of enrollment.
  - Note: As a reminder, agents are required to communicate with consumers in the manner the consumer prefers, including having some means of accommodating members who wish to meet face-to-face at an agreed upon location.
- In the following pages, the uniqueness of each signature type are highlighted

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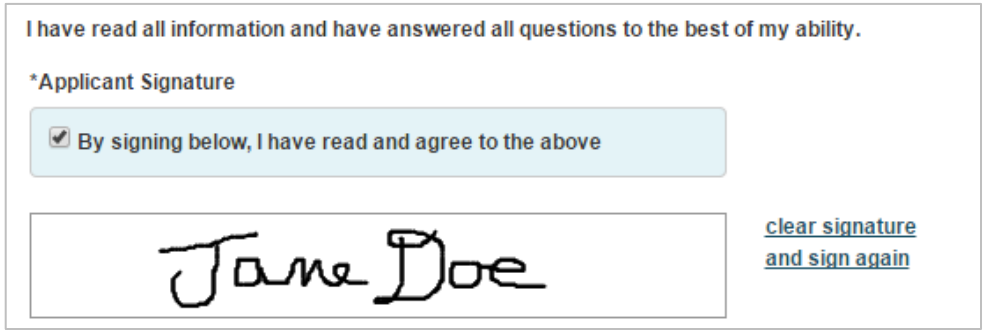
Electronic Signature Details

- If meeting with a consumer in-person, the consumer has the option to sign the application using a signature pad or touch screen device.
  - If you use a Topaz signature pad for Medicare Supplement applications, you need to download and install the SigWeb plugin from Topaz: http://www.topazsystems.com/Software/sigweb.exe
  - You are given the opportunity to test your signature pad prior to starting the application.
- To activate the signature box, the consumer must consent to the statements above by checking the box and then sign within the signature box. Their signature will appear on the screen.



- To clear and re-sign, the consumer will need to click the “clear signature and sign again” link next to the signature box.

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Remote / Digital Signature Details

- This process allows consumers to sign remotely – they can be in-person with you or at a convenient location, preferably near their computer to sign their application.
- The consumer's email is required for the remote signature process so they can receive the DocuSign email.
- You will not sign an application completed by remote signature.
- The access code is agreed upon by you and the applicant. The applicant will use this code during the DocuSign remote signature process.
- The applicant has 24 hours to complete the DocuSign remote signature process.
- A reminder email is sent to you and the consumer if not signed within 8-12 hours.
- You have the ability to resend the application – to the original email address provided or to a different email address. You also have the ability to change the access code if consumer forgot the original one.
  - Consumer may provide us with one email address. Changing the email address for remote signature, will also change where we deliver other items that they may have agreed to early on (i.e. electronic plan documents).
- And you have the ability to update the application and resend if an error is found.

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Voice Signature Details

- This process allows consumers to sign remotely – they can be in-person with you or at a convenient location. Unlike remote signature, they are not required to have an email address.
- Make sure you have the ability to do a conference call or 3-way call with the consumer and phone recording system.
  - You and the consumer must have clear lines and be easily heard in the recording.

! All questions and disclaimers displayed on the screen must be read word-for-word to the consumer during the recording.

  - **Exception:** Gray boxes are instructional content for you and should not be read to the consumer.
  - If information is not read accurately, application will pend and a new application with recording will be required from you and the consumer.
  - If response is not received in a timely manner, application will be denied.

Want to see and hear a demonstration of an online enrollment recording with the voice signature capability in action?

To access click here

Note: It may take a couple of seconds to load.

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Voice Signature Details (cont'd)

- For applications to be processed immediately, AARP Membership should be collected prior to entering LEAN.
  - ✓ If the consumer is not an AARP member, **AARP membership** must be purchased either by credit card within myAARPconnection.com OR by calling 1-866-331-1964, Monday-Friday 7 a.m. – 11 p.m., Saturday, 9 a.m. – 5 p.m. ET.
  - ✓ You must assist the consumer in either joining or renewing their membership prior to the start of the voice signature process.
  - ✓ **You must not record credit card information during the application process**.

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Legal Representatives

- Onscreen prompts are provided in obtaining consent for voice recording or remote signature, confirming if the consumer or their Legal Representative is completing the application, etc.
- If a person with legal authority to enroll on behalf of the consumer is present, the person's name must be captured
- Documentation must be provided to UnitedHealthcare to show proof of legal representation.
- Electronic Funds Transfer (EFT) will not be an option if the legal representation is signing.
  - EFT can be set up post-enrollment

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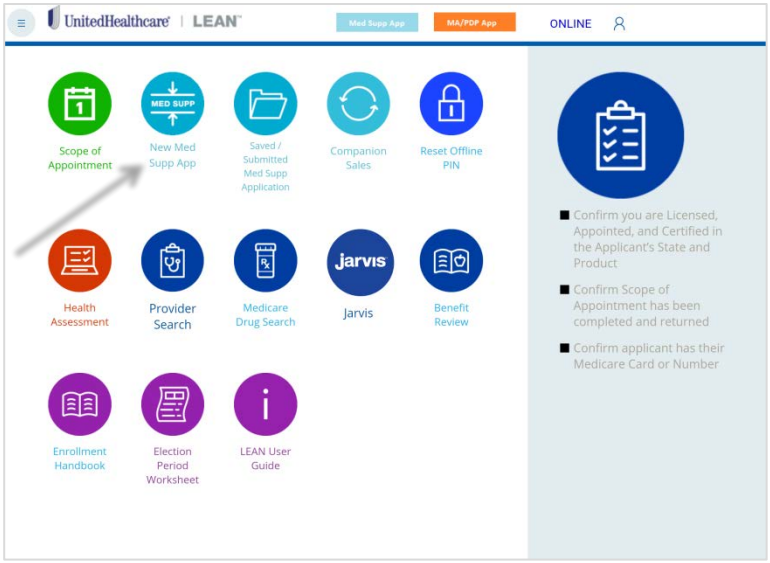
Let's Get Started

- Click on the teal button to start a new AARP Medicare Supplement Application.
- The application will open in a new window if using LEAN via browser. If using the mobile app, your default browser will open with the application.
  - ✓ **Tip**: Be sure pop-up blockers are turned off.

Note: The following screens will display touch device screen content. Contentwill vary by state, applicant eligibility and signature capture type.



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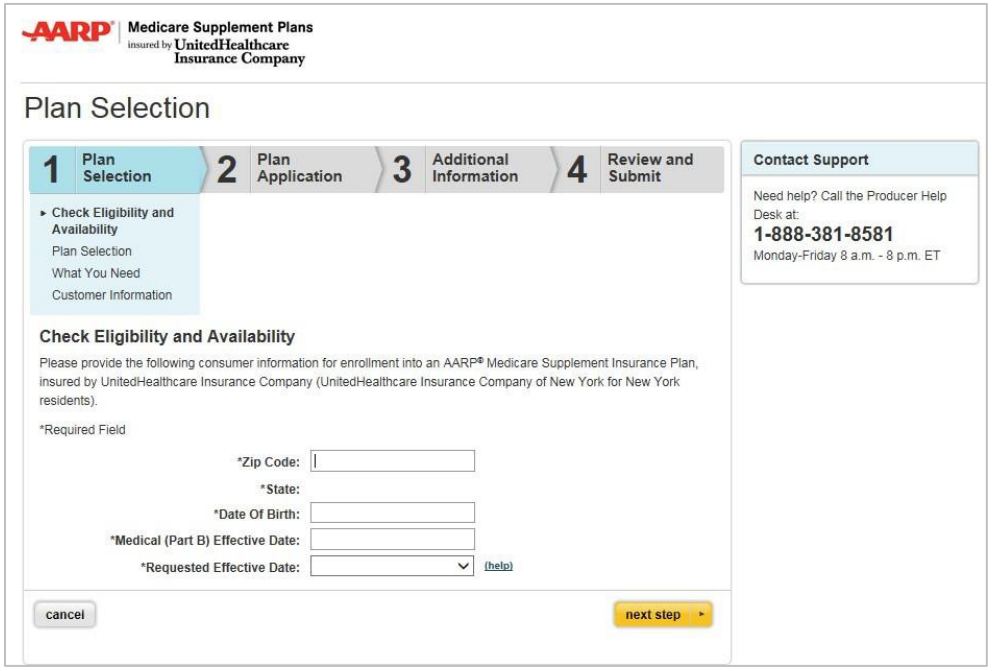
Plan Selection

Check Eligibility and Availability

- Enter the consumer's permanent resident ZIP code.
- The "State" field will be pre-populated based on the ZIP code.
- Enter the consumer's date of birth and the Medicare Part B effective date (including future effective date, if applicable).
- Select the consumer's requested effective date.
  - Effective dates can be entered up to 14 months into the future. The consumer must be turning age 65 or older at the time of the requested effective date to use this online application



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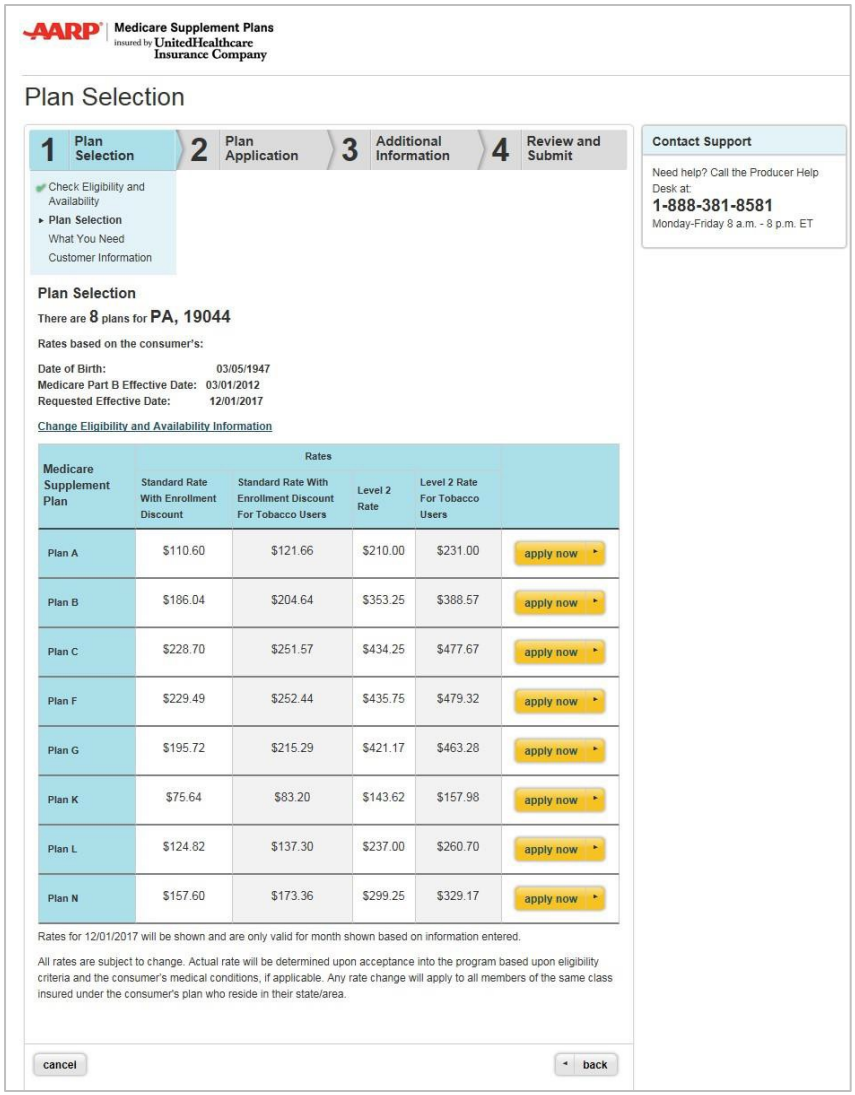
Plan Selection

Plan Selection

- Based on the information provided on previous screen, the available plans and estimated monthly premium rates for each plan will be displayed. A single estimated amount is provided after all the application questions have been answered.
- **Important:** Premium rates do not include discounts for multi-insured, electronic funds transfer, and annual payer. Relevant discounts will be applied after the application is processed.
- If the consumer is eligible, potential premium rates will include the Enrollment Discount.
- Based on discussions with the consumer, please select the plan that best fits the consumer's needs.



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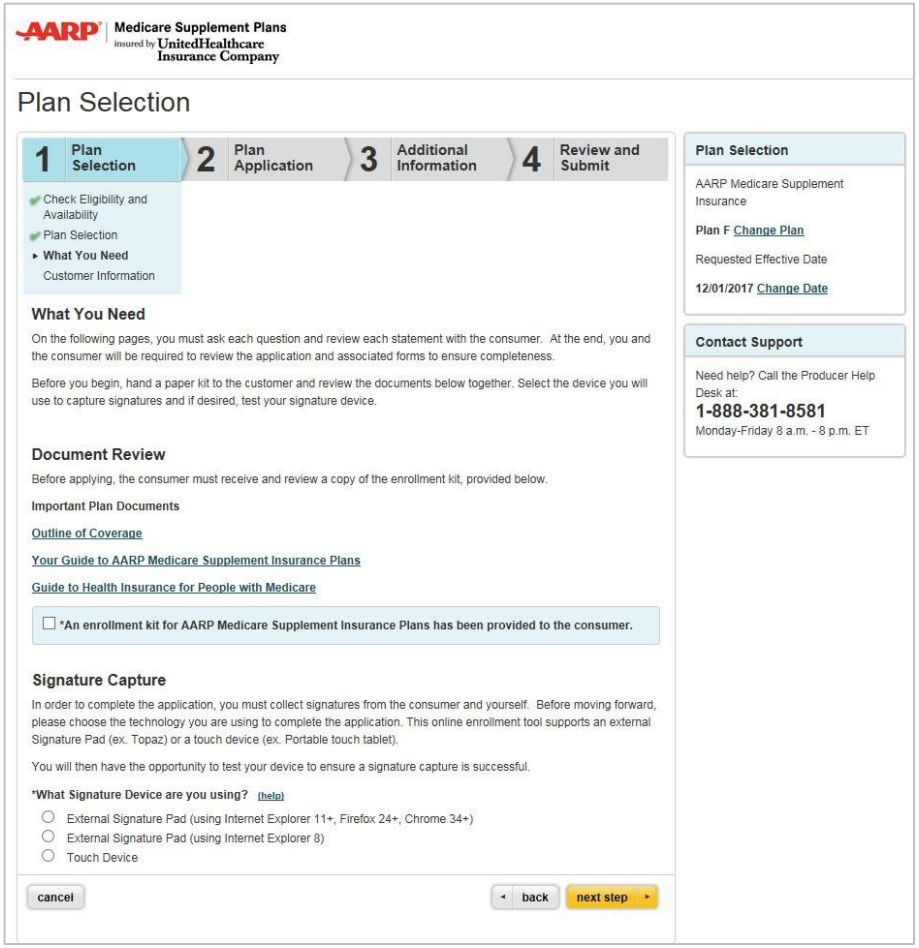
Plan Selection

What You Need and Document Review

- Before you start to answer the application questions, you must provide the consumer with a copy of the AARP Medicare Supplement enrollment kit and attest to doing so.
- Indicate the type of method to be used when capturing the signature
  - Electronic Signature: signature pad or touch device.
    - You will also be given an opportunity to test your signature capture device, if applicable. This is optional.
  - Remote digital signature via DocuSign
  - Voice Signature (in certain states)



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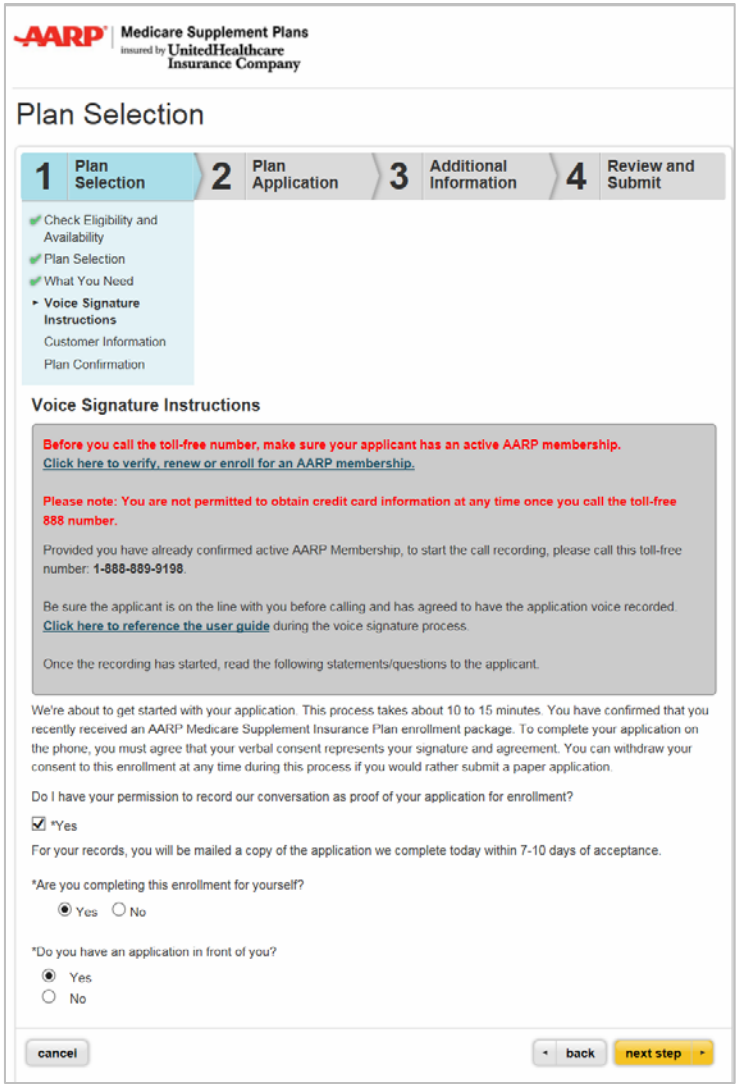
Plan Selection – Voice Signature

If the voice signature option was selected on the previous screen, you will be provided with the following information.

Voice Signature Instructions

- To start the voice signature recording, call **1-888-889-9198.**
- Be sure the consumer is on the line with you before calling.
- You will be provided with a greeting. When prompted, enter your Writing Agent ID via your key pad and enter # when finished.
  - For Writing IDs with alpha characters, please omit when entering on your key pad.
- Wait until the system prompts you with a recording confirmation number. This could take up to 5 seconds to be provided to you.
- Once the confirmation is read to you, the system will ask you to “enter 2 to continue.”
- **Once you dial 2, you may begin recording**. If you hear music, wait until you no longer hear the music to start recording.



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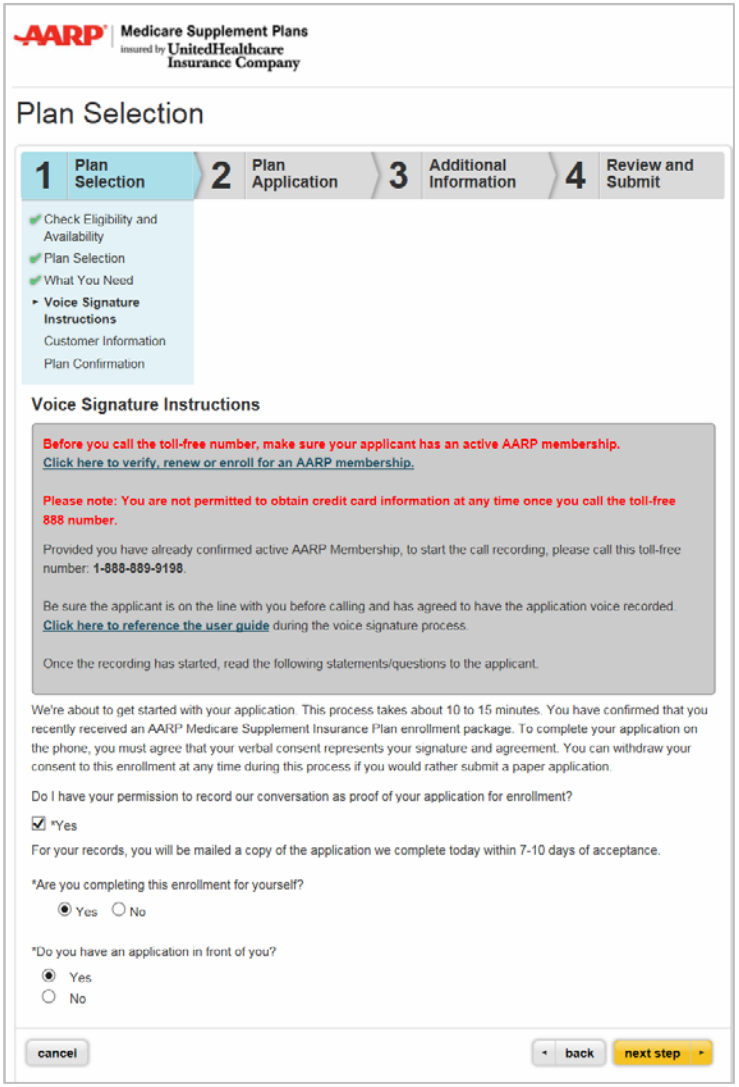
Plan Selection

Voice Signature Instructions (cont'd)

- AARP membership is required to enroll in an AARP Medicare Supplement Plan.
  - We will collect AARP Membership on the next screen. However, you are not permitted to record credit card information while recording enrollment application and forms. Therefore, enroll the consumer for AARP membership **prior** to calling the toll-free number.
  - A link to the AARP Membership tool is provided on the screen. The tool allows you to apply, renew and verify the consumer's AARP membership.



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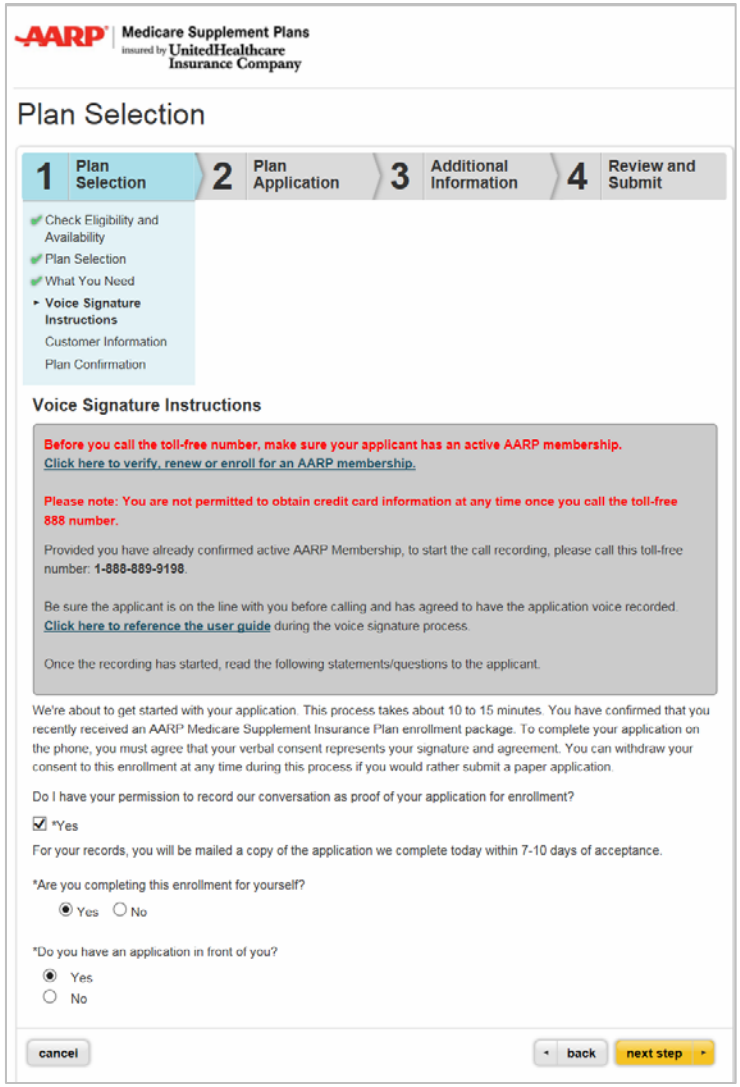
Plan Selection

Voice Signature Instructions (cont'd)

- Consumer must attest to receiving an enrollment kit.
- On certain screens you will see gray boxes. The gray boxes contain instructional copy for you to read to yourself and not to be read out loud to the consumer and/or recorded.
- Agents must follow all the instructions within LEAN. Agents must ask all questions and read any other information, including but not limited to disclaimers, terms and conditions, notices, authorizations, etc., verbatim without alteration.
- As the consumer responds to the questions, you will enter the consumer enrollment information on the screen.



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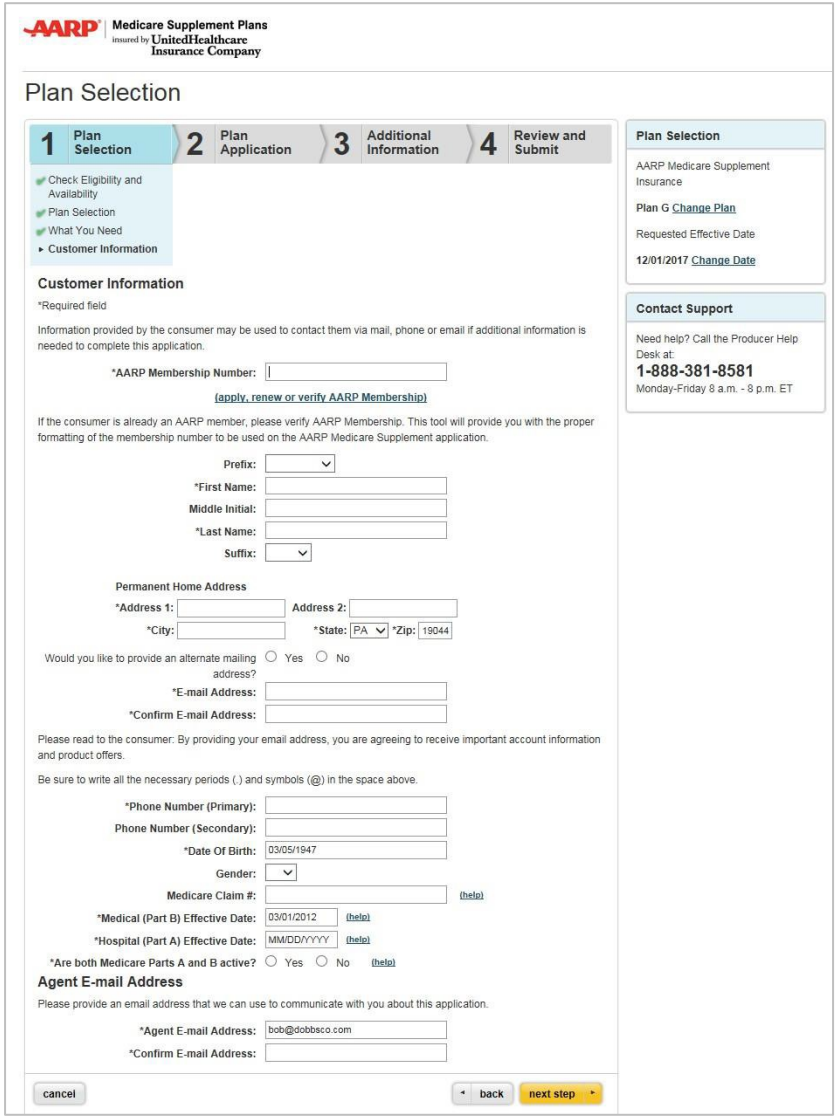
Plan Selection

Consumer Information

- AARP membership is required to enroll in an AARP Medicare Supplement Plan. Please click on the link next to the corresponding field to apply, renew and verify the consumer's AARP membership.
    - **Voice Signature users**: This link was provided to you on the previous and will not be provided to you on this screen as membership must be obtained prior to the start of voice recording. If voice recording has started without membership, hang up to complete membership and restart the process over. If you submit without membership, applications will not be processed and you will be contacted to collect the membership number. Therefore, it is important that you obtain the AARP membership prior to the start of the recording so the application can be processed immediately.
- Please fill out the consumer and agent information on this page. Any information that was entered on the previous page will pre-populate on this and future screens. If you need to make a change, you will be prompted to return to the original page where you initially entered the information.
- Information provided may be used to contact the consumer via mail, phone or email if additional information is needed to complete this enrollment application.



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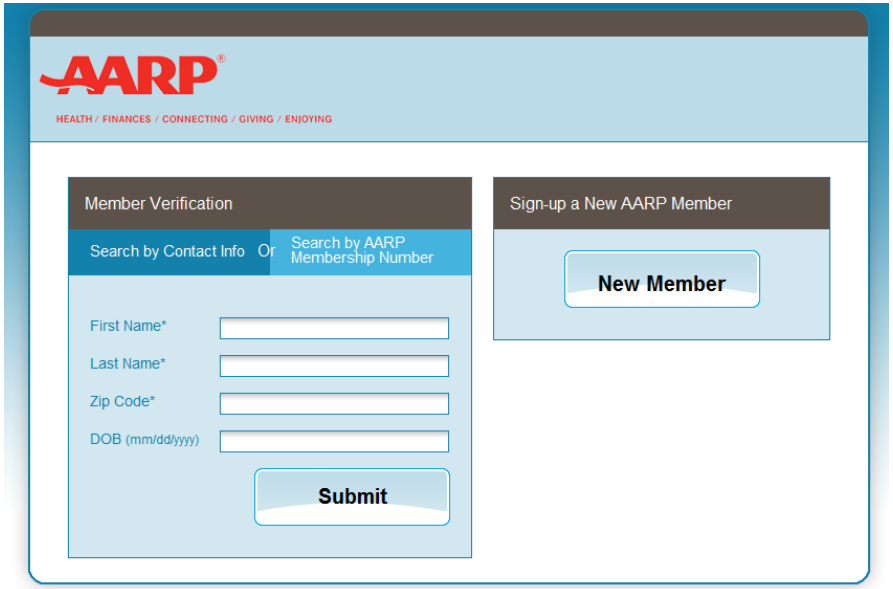
AARP Membership Portal

If you select the link to join, renew or verify AARP membership, a new window will appear.



Member Verification

- If the consumer is already an AARP member or resides in the same household as an AARP member, you can verify the member number or look the member up by contact information of it is not known.

New Member

- Click on “New Member” to sign-up a consumer for AARP Membership.

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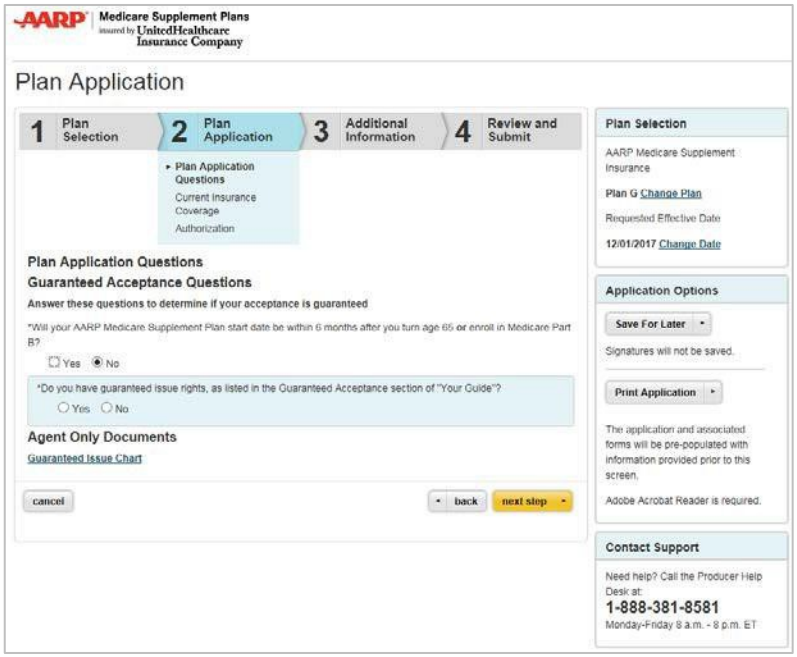
Plan Application

Guaranteed Acceptance

- Please answer all questions on this page. The responses to some of the Guaranteed Acceptance questions have been pre-populated based on the consumer's date of birth, Medicare Part B Effective Date and Requested Effective Date that you entered earlier. Please provide responses to all other required questions.
    - **Voice signature users:** Regarding pre-populated answers, ask the question and receive the answer from the consumer. Responses must be recorded from the applicant, even though the screen has pre-populated the response based on previous information provided.
- As you enter the consumer's answers to questions, the tool displays only the subsequent questions required for the consumer.



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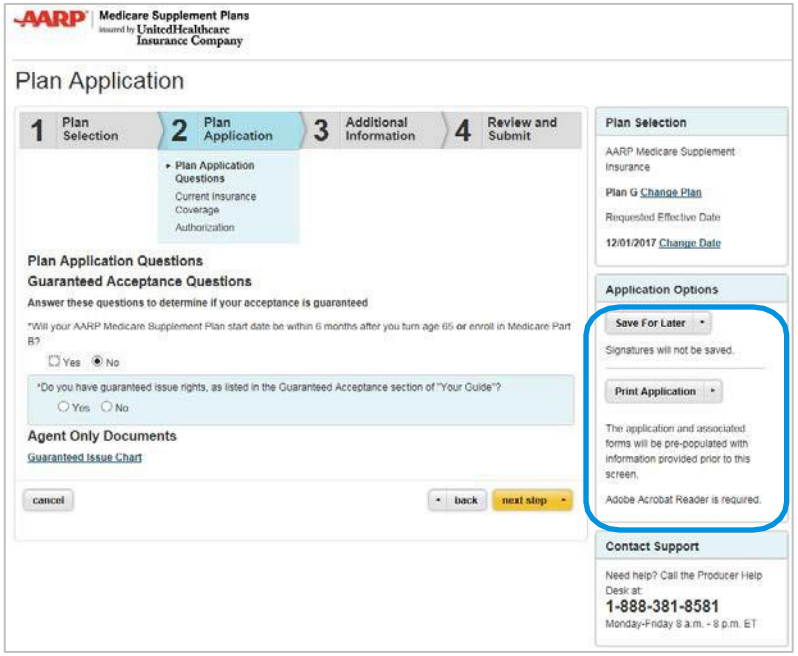
Print and Save for Later

Starting from this page forward, you have the option to “Save For Later” and “Print Application.”

Save for Later

- The “Save for Later” functionality allows you to save an incomplete online enrollment application for up to 90 days.
- If you choose the “Save for Later” option, signatures will be cleared.
- When resuming an enrollment application, you must review the entire enrollment application again. Please ask all questions and reconfirm all prior answers, as the consumer’s status or medical conditions may have changed.
- Signatures must be recaptured.
  - **Voice Signature users:** If resuming an application, please start the recording from the beginning. We must have one recording for one application submitted.



Print

- You can print an application with the data you have entered thus far and submit the application via mail, if you or the consumer desires.

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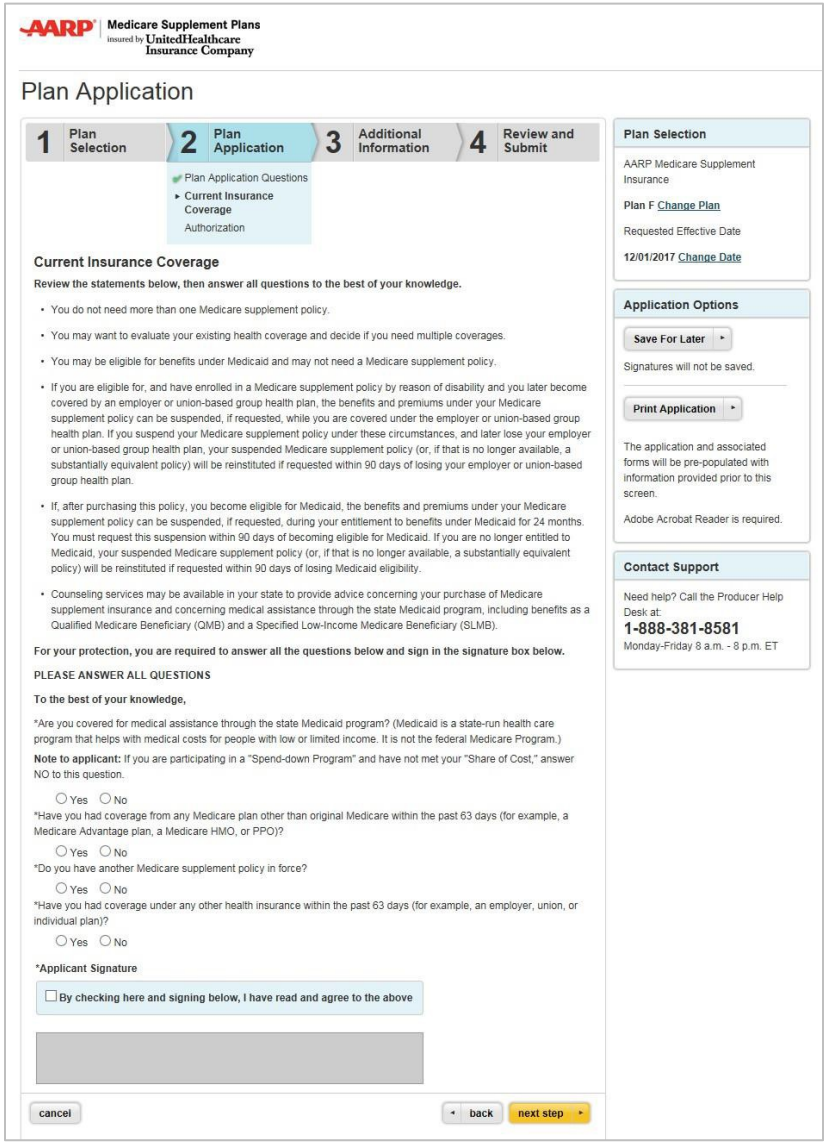
Plan Application

Current Insurance

- Review the statements and questions regarding past and current insurance coverage with the consumer. The consumer must answer all questions to the best of his/her knowledge.

- Additional questions may display, depending on how the consumer answers each question.



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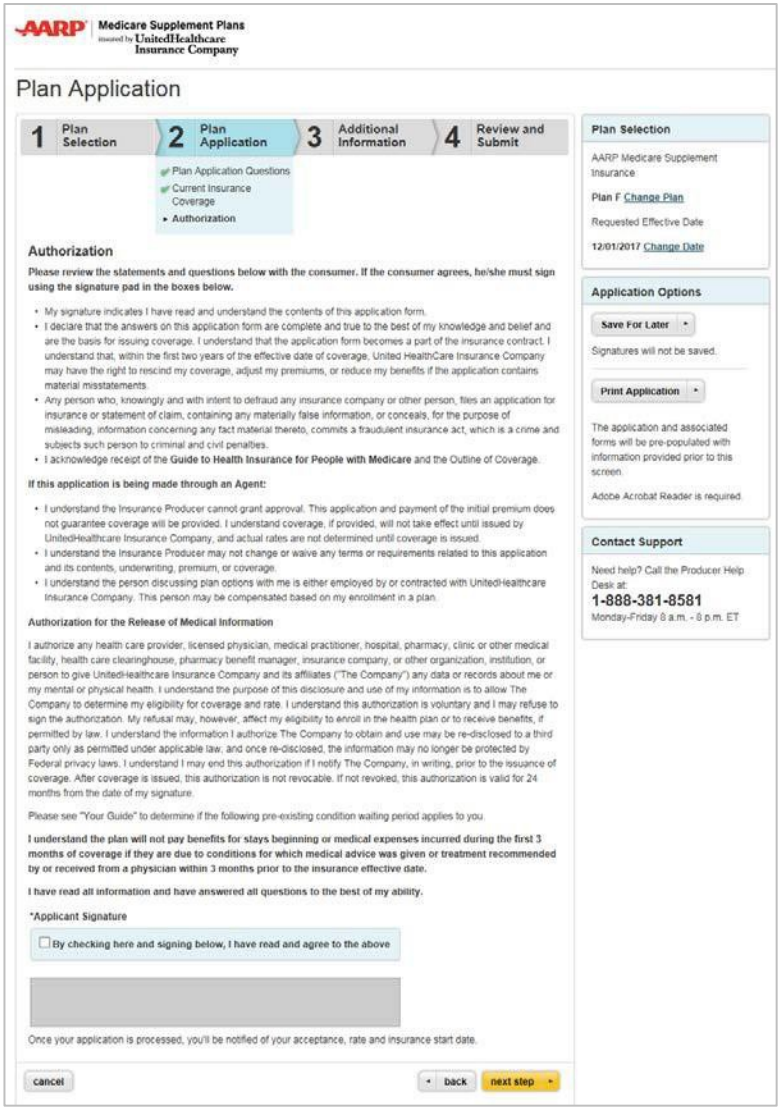
Review and Submit

Review and Sign

- The consumer must be able to read all of the statements on this page and agree.
    - Voice and remote signature users: You must read the statements to the consumer.
- If the consumer agrees, he/she needs to sign using one of the methods described here.



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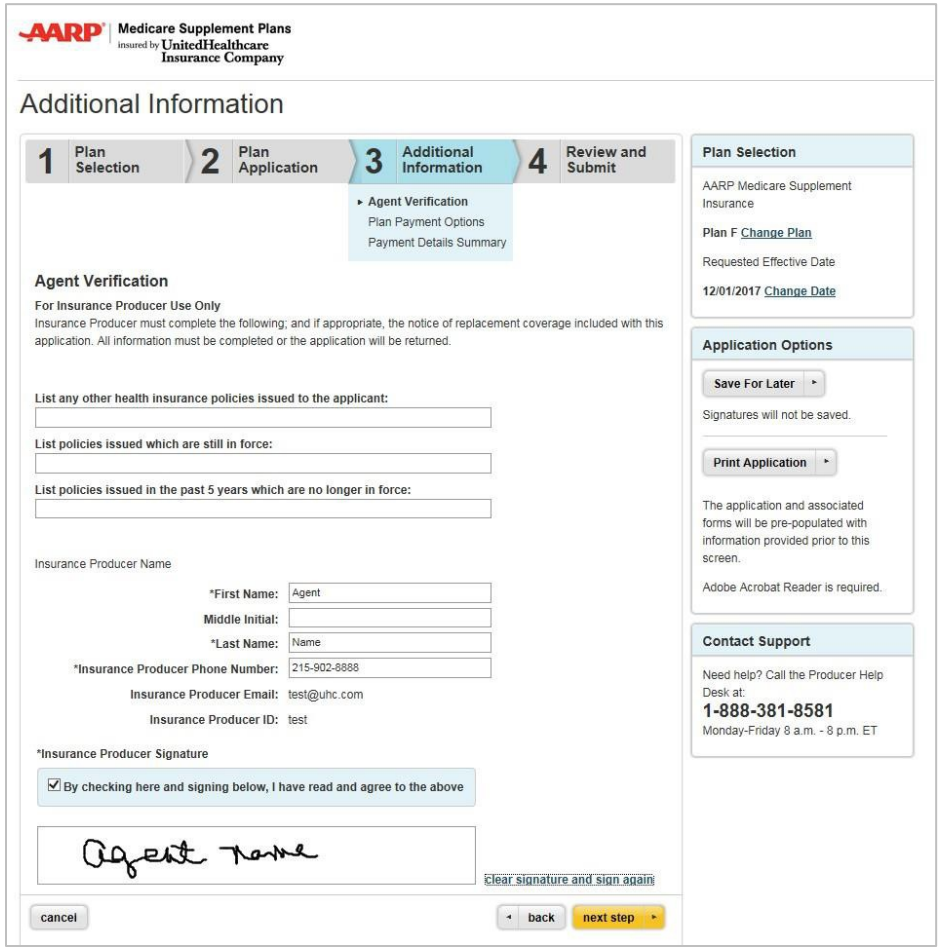
Review and Submit

Agent Verification

- As an agent, you must complete the information on this page. Leave blank if the questions do not apply.
- Sign your name to confirm you have read and agree with the information on this page.
  - Note: for remote signature, agents need to check a box, which will serve as your signature. This applies to other forms, if applicable, where an agent signature is required (i.e. Replacement Notice)



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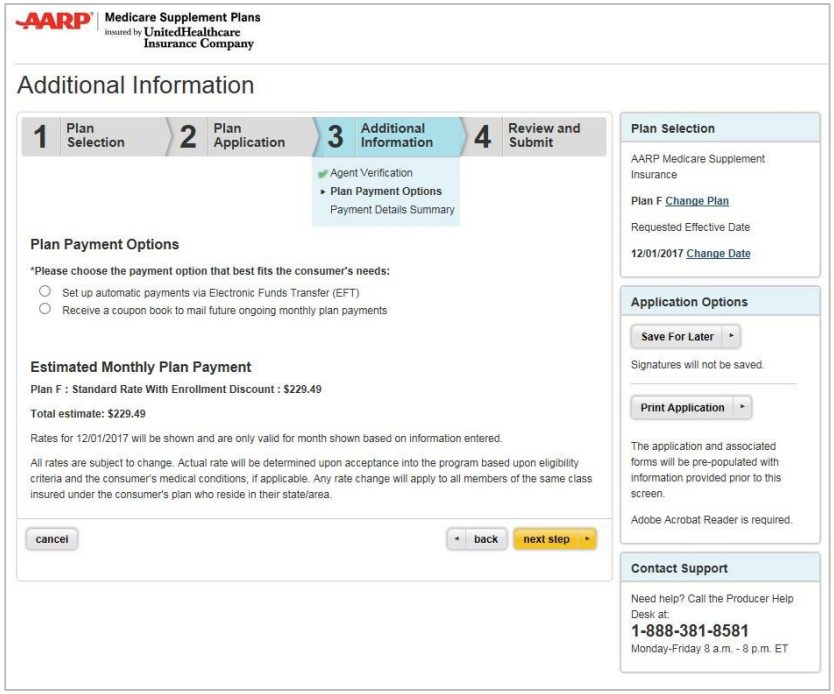
Review and Submit

Plan Payment Options

- Choose the payment option that best fits the consumer's needs. The consumer can choose either monthly coupon booklet payments OR recurring EFT.
  - For legal representatives: Recurring EFT will not be an available option.
- An estimated monthly plan rate is calculated and provided. This rate is based on the answers provided. It will not include discounts, such as multi-insured and EFT, if applicable. Discounts will be applied upon acceptance.
- **Note:** Please inform the consumer that the rate is subject to change upon additional review of the application.



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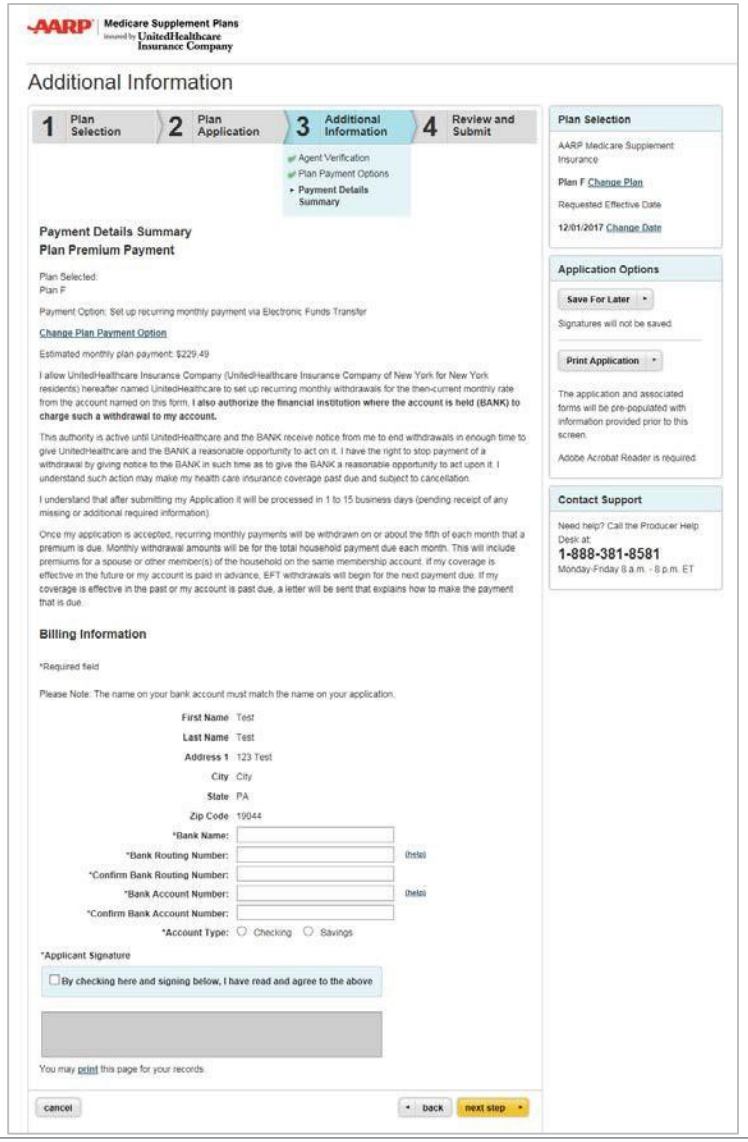
Review and Submit

Payment Details Summary

- Depending on which option was selected on the previous page, you may be presented with the following EFTform.
- The name on the bank account must match the name on the enrollment application. Therefore, the consumer (bank account holder) must read all of the statements, agree and sign by using the signature pad or touch device.
- All required banking information fields must be completed.



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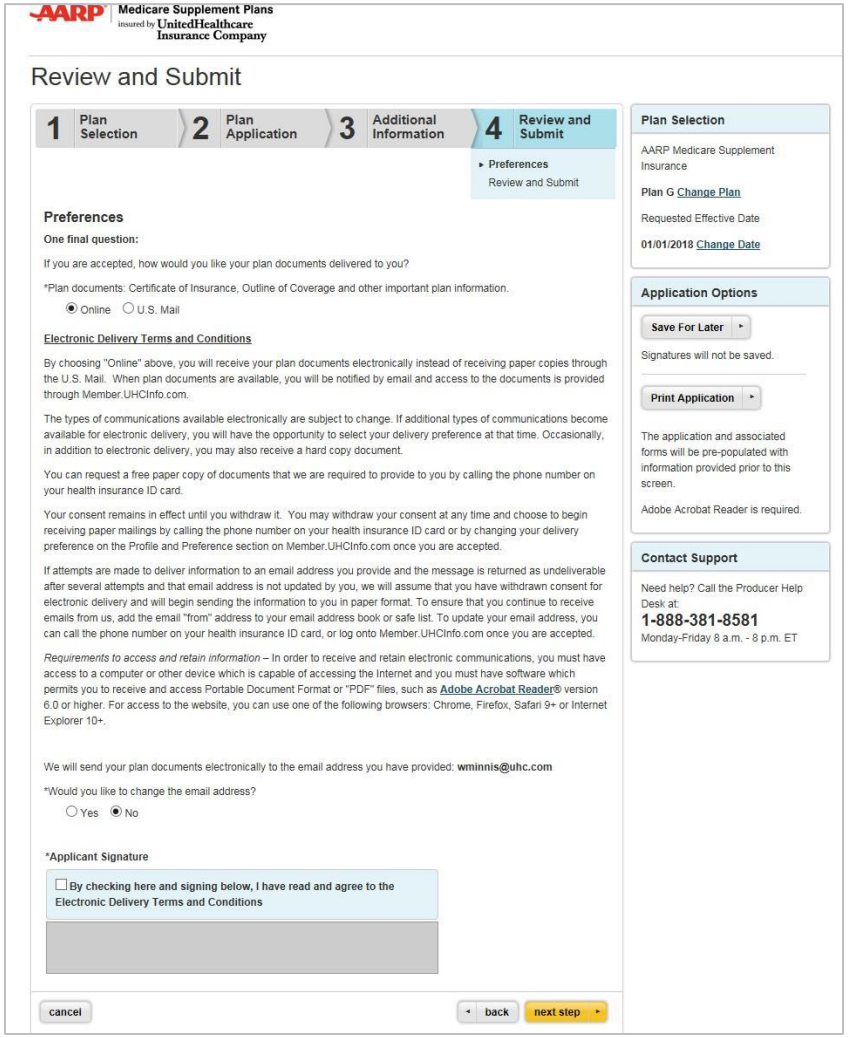
Electronic Plan Documents

Preferences

Consumers have the option to receive their Plan Documents (i.e. Certificate of Insurance, etc.) electronically or via paper

- The electronic option is only available via LEAN for AARP Medicare Supplement Plans
- The Member ID card and the Coupon Booklet are mailed separately from the Plan Documents.
- When plan documents are available, the consumer will be notified by email and access to the documents will be provided a secure website

The types of communications available electronically are subject to change. If additional types of communications become available for electronic delivery, the consumer will have the opportunity to select their delivery preference at that time.



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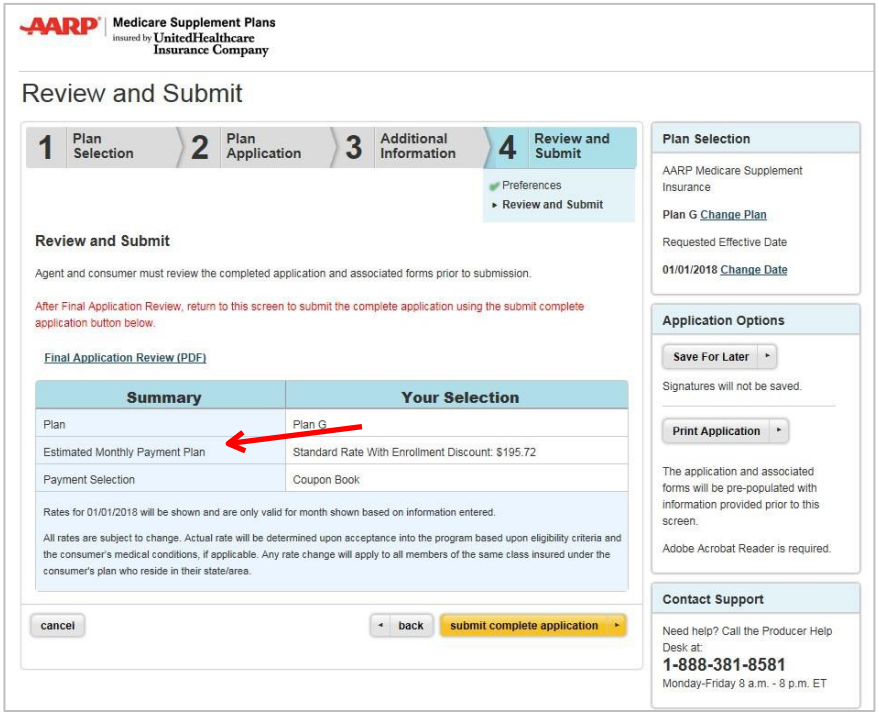
Review and Submit

Final Application Review

- Before submitting the application, agents are required to have the consumer review all information on the application and associated forms in Acrobat PDF when signing via **touch screen or signature pad**.
    - Upon submission, we strongly encourage that you provide a printed copy of the enrollment application and associated forms to the applicant.
- **For voice signature users**, agents must review the application to ensure accuracy.
- If any changes need to be made, close the PDF and use the back button to go back to the page where you need to make a correction.
- **For remote signature**, consumers will receive a copy of their application and subsequent forms electronically. See pages 64-67 for specific information.



Note: For privacy and security purposes, agents are prohibited from saving the application PDF to their computers, flash drives and other portable storage devices. Agents can access the application via LEAN under "Saved/Submitted Applications".

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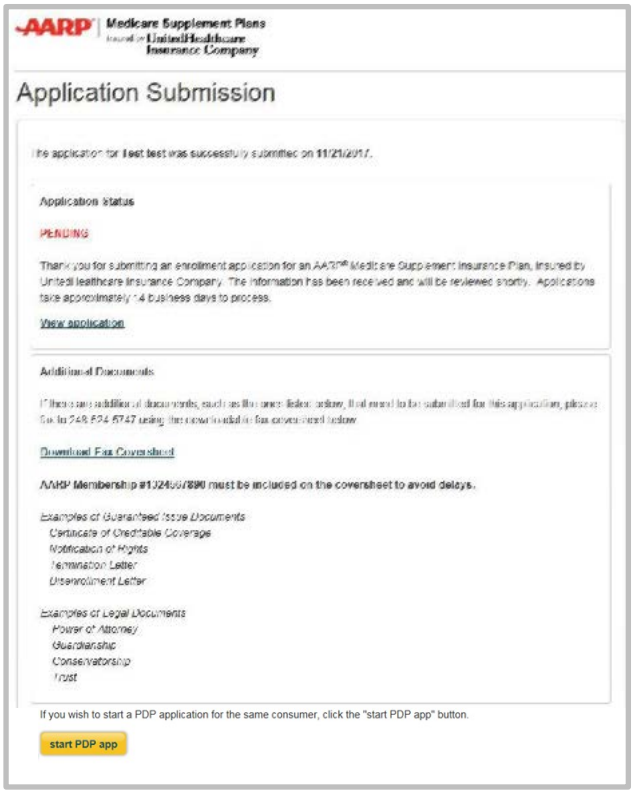
Application Submission

Submission Confirmation

- Upon submitting the application, you will be presented with a confirmation screen, which will include an immediate application status! In some cases, applications could be accepted within seconds.
  - Application status will not be pending for remote signature users as the application has been sent to the consumer for their digital signature; however, you will receive an email once the consumer signs
  - For LEAN applications submitted with signatures, real-time application status is available via Jarvis.
- For some enrollment applications, (i.e. missing documentation for a Guaranteed Issue scenario), it could take approximately 14 business days to process, following the receipt of any additional documentation or information that may be required.
- You will also be given the opportunity to view and/or print the submitted application.



Confirmation emails will be sent to you and the consumer within 10 minutes after the application is submitted.

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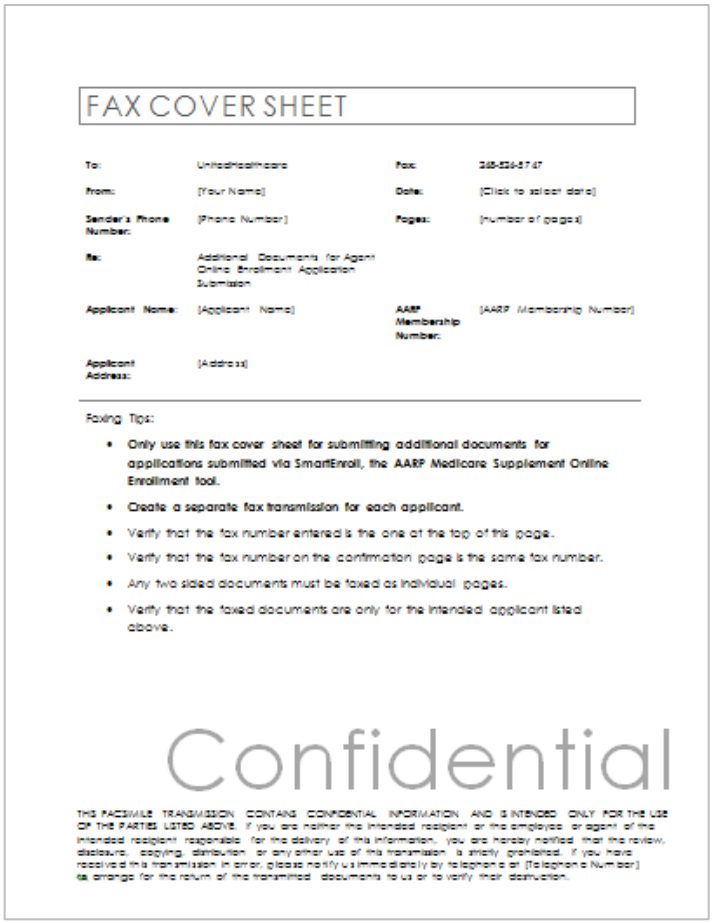
Application Submission

UnitedHealthcare

Additional Documentation

- If you have additional documents (such as Legal or Guaranteed Issue documents) that are needed to process the online enrollment application, please fax in the required documents to the following fax number: **248-524-5747.**
  - This fax number must only be used to provide additional documentation for applications submitted through LEAN for AARP Medicare Supplement Plans.
- A fax coversheet is provided on the submission confirmation page for your convenience.
- Please be sure to include the consumer's name, address and AARP membership number on the fax coversheet.
- Once you receive a fax receipt confirmation, please return original documents to the consumer or destroy copies in a secured manner.



FAX COVER SHEET

To:	UnitedHealthcare	Fax:	248-524-5747
From:	[Your Name]	Date:	[Click to select date]
Sender's Phone Number:	[Phone Number]	Pages:	[number of pages]
Re:	Additional Documents for Agent Online Enrollment Application Submission		
Applicant Name:	[Applicant Name]	AARP Membership Number:	[AARP Membership Number]
Applicant Address:	[Address]		

Faxing Tips:

- Only use this fax cover sheet for submitting additional documents for applications submitted via SmartEnroll, the AARP Medicare Supplement Online Enrollment tool.
- Create a separate fax transmission for each applicant.
- Verify that the fax number entered is the one at the top of this page.
- Verify that the fax number on the confirmation page is the same fax number.
- Any two sided documents must be faxed as individual pages.
- Verify that the faxed documents are only for the intended applicant listed above.

Confidential

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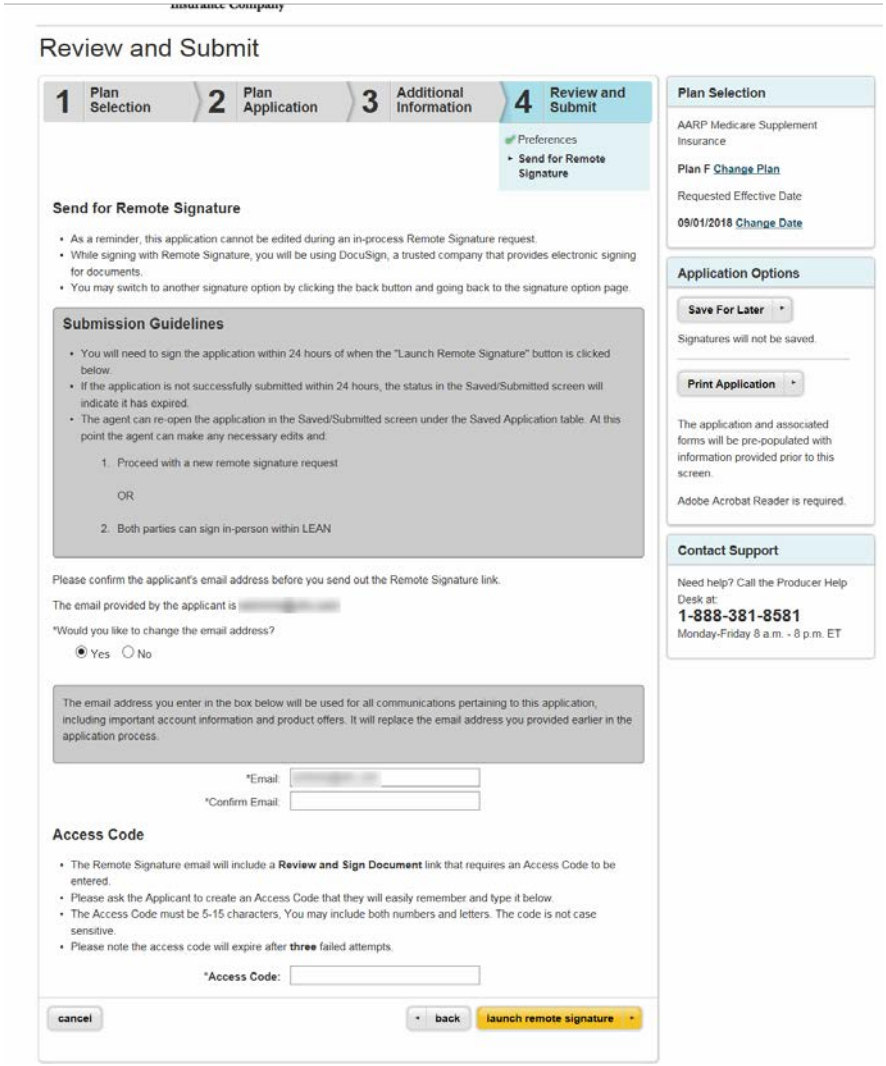
Remote Signature Submission Page

- This screen has instructions on the remainder of the remote signature process as covered previously.
- The consumer has the option to update their previously provided email address at this point. If email address is updated, please read the information in the gray box regarding email address changes.
- Please enter the access code the consumer will need to open and sign the application within DocuSign. The access code is agreed upon by you and the applicant.
    - The access code must be 5-15 characters and may include letters and numbers.
- Clicking on the “Launch Remote Signature” button does not mean your application is submitted! The applicant still has to complete the Remote Signature steps to sign and submit the application.



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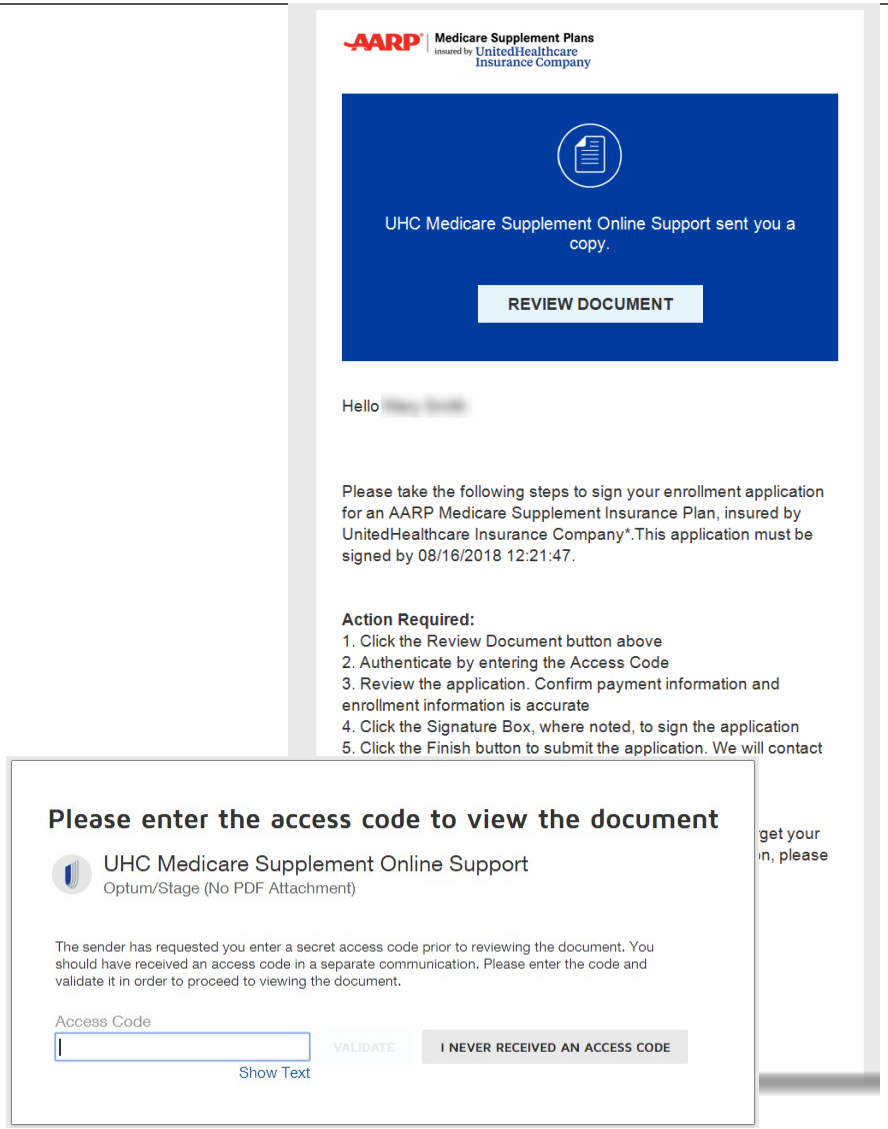
Remote Signature – DocuSign Process

- After completing the remote signature process in LEAN and submitting the application, the applicant will receive an email from DocuSign instructing them to review their document.
- The DocuSign email also includes instructions to the applicant to complete the process.
- The applicant has 24 hours to complete the DocuSign remote signature process.
- After clicking Review, the applicant will be sent to the DocuSign website.
- The applicant will have to enter the previously agreed upon Access Code.
- If the applicant forgets the code, you are able to see it by viewing the applicant's application in LEAN Saved applications.



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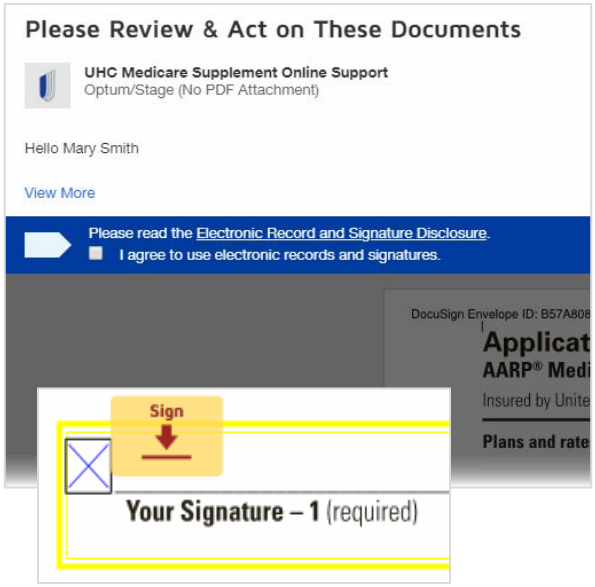
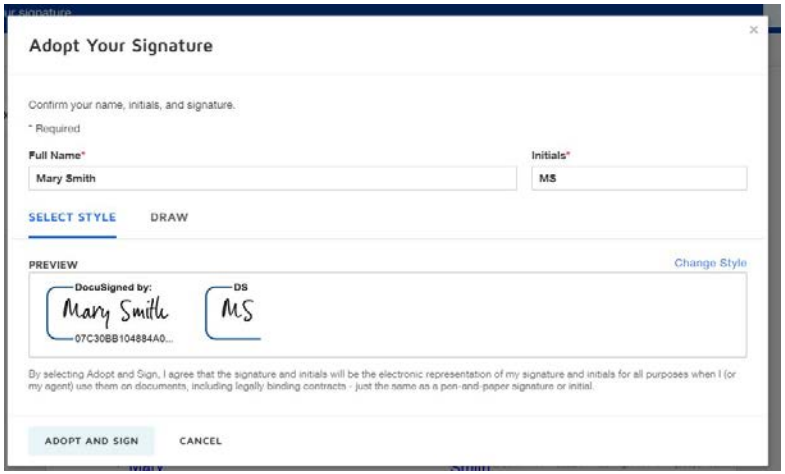
Remote Signature – DocuSign Process

- After entering the access code, the applicant will be asked to read and agree to the Electronic Record and Signature Disclosure. Once accepted, the applicant will be presented with a copy of their application to review.
- Several “Sign” buttons will be on the application to be signed. Clicking on those buttons will prompt the applicant to choose signature style once but they will need to affix a signature at each signature space in the application.
    - NOTE: Interacting with other areas of the DocuSign site (i.e. home page of DocuSign) may direct the applicant away from the signing process and result in failure.
- After signing all “Sign” buttons, the applicant should click Finish to complete the process.





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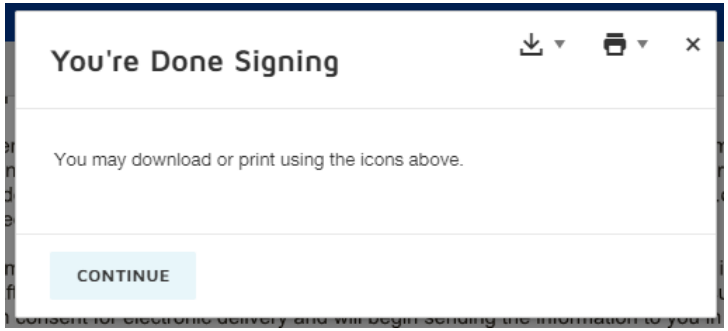
Remote Signature – DocuSign Process

- The applicant will be notified that they're done, and both applicant and agent will receive an email from DocuSign with a link to the completed, signed application. It is accessible by logging in with the access code.
    - The consumer also has the option to print or download from this screen, if they choose to do so. In either case, they will still receive a confirmation email with a link to the completed, signed application.
- Agents also have access to completed application by going to the home page of LEAN and clicking on the saved/submitted button.



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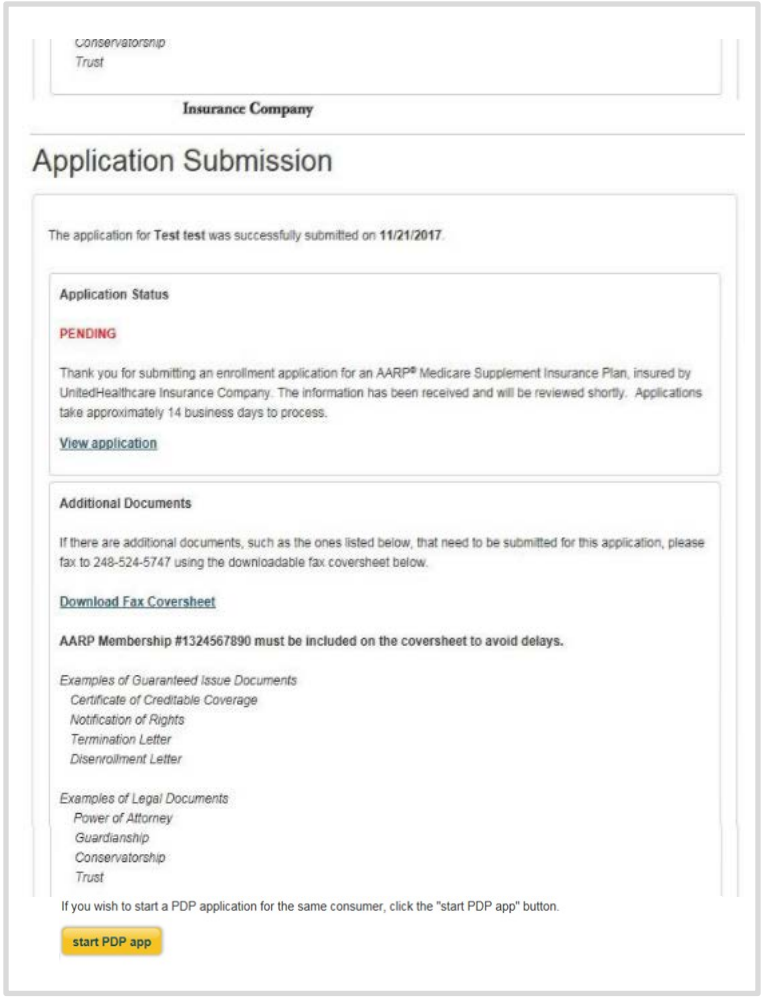
Medicare Supplement / PDP Enrollments

- If you have a consumer enrolling in AARP Medicare Supplement and AARP MedicareRx plans, we've made it easy for you and your member.
- On the submission confirmation page, you will find a button that states "Start PDP app"
- Consumer information that was completed on the AARP Medicare Supplement application will be applied to the AARP MedicareRx application (and vice versa).
  - Information includes – Name, address, email address, phone number, date of birth, gender, Medicare number and Medicare effective dates



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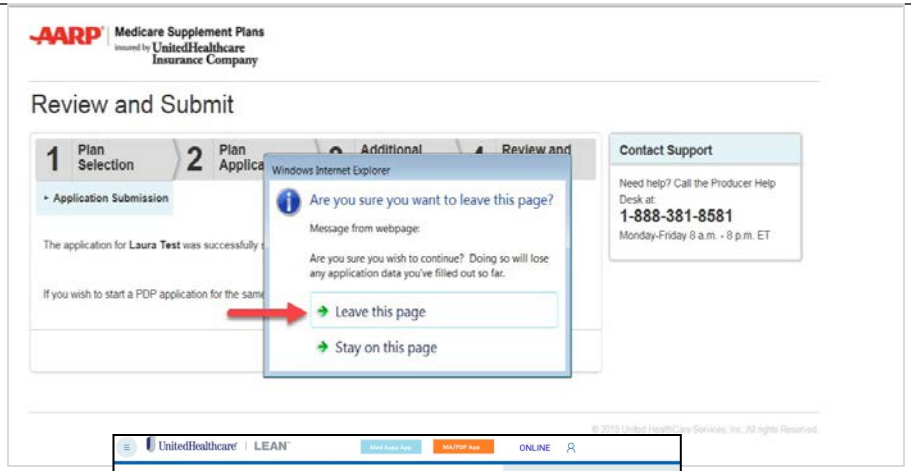
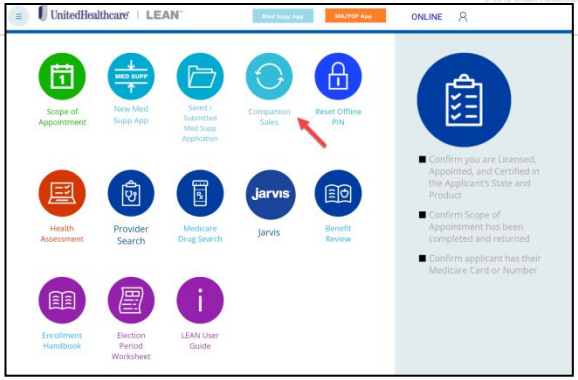
Medicare Supplement / PDP Enrollments

Follow these important steps:

1. After clicking the “Start PDP App” button, click on “Leave this page”. You will be presented with the LEAN Home Page.
2. Click on the Companion Sales button found on the Home Page.
3. Find the submitted application and click on “Open App” for the companion sale Part D application.
4. The first 2 pages of the Part D application will already be completed.
5. While the data is copied over, please confirm that the data is accurate with the consumer.





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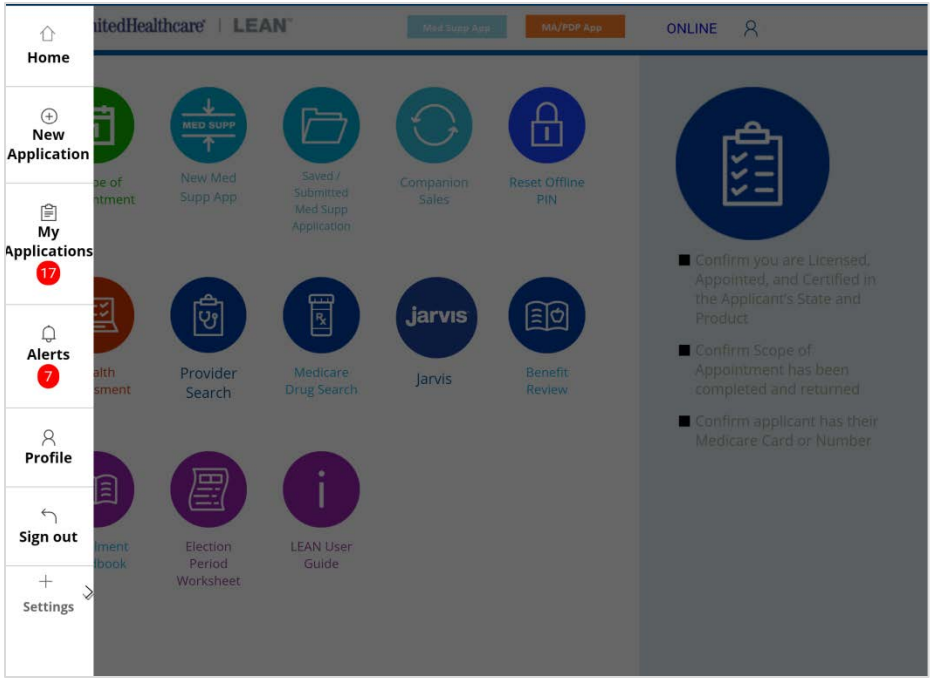
Viewing Your Applications and eSOAs

Locate Your Applications

- Both MA/PDP and Medicare Supplement applications can be viewed from the LEAN Home Page.
  - MA/PDP applications are viewed by clicking the “My Applications” button on the hamburger menu on the left side of LEAN.
  - Medicare Supplement applications are viewed by clicking the teal “Saved/Submitted Med Supp Applications” button on the Home Page.
  - PDP Companion Sale applications begun from a completed Medicare Supplement application can be opened and completed from the teal Companion Sales button.



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MA/PDP Applications

- MA and PDP applications are stored in the My Applications section of LEAN.
- There are two tabs to My Applications
  - The Action Required tab is for applications that have not yet been submitted
  - The Submitted tab is for applications that have been submitted
- The mobile app features a Refresh button for uploading applications and a View/Search Applications button to open the website in your mobile browser.

- Applications can have one of several statuses:
  - "Incomplete" for saved applications
  - "Pending Upload" for applications that have not been uploaded
  - "Remote Signature: In Process" when the member has not yet signed their DocuSign application.
  - "Remote Signature: Failed" when the member has declined their DocuSign application.
  - "Submitted" for all submitted applications"

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Scopes of Appointment

- Scopes of Appointment are stored in the My Applications section of LEAN under the My SoA Confirmations tab at the top.
- There are two tabs to the My SoA Confirmations page:
  - The Action Required tab is for eSOAs that have not yet been completed
  - The Completed tab is for eSOAs that have been completed
- The mobile app features a Refresh button for uploading eSOAs and a View/Search SoA Confirmations button to open the website in your mobile browser.

- Applications can have one of several statuses:
  - "Incomplete" for saved eSOAs
  - "Pending Upload" for eSOAs that have not been uploaded
  - "Remote Signature: In Process" when the consumer has not yet signed their DocuSign eSOA.
  - "Remote Signature: Failed" when the consumer has declined their DocuSign eSOA.
  - "Completed" for all completed eSOAs.

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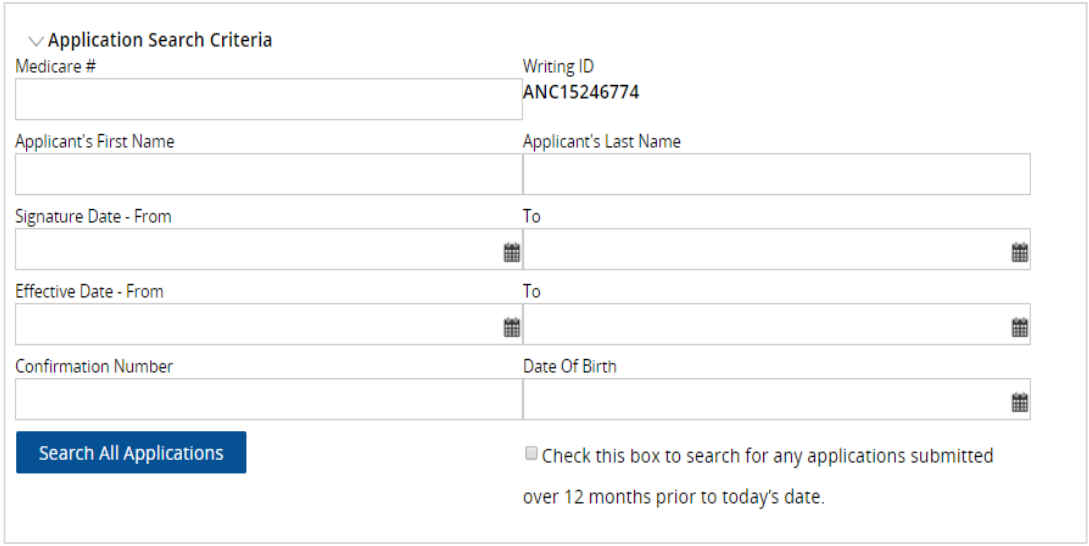
Searching for Applications/eSOAs

- All submitted applications and eSOAs are stored in the Submitted and Completed tabs of the My Applications page.
- While on the mobile app, you can see all of your submitted applications and eSOAs, but you cannot view, download, or delete them.
- To view, download, or delete applications and eSOAs, use the website. On the website, you can view submitted applications and eSOAs, download PDF copies, or delete incomplete entries.
- On the website, only the past 60 days' worth of applications and eSOAs will display automatically.

- On the website, the Application and eSOA Search Criteria are open by default.
- To view applications and eSOAs older than 60 days, complete at least one search criteria.



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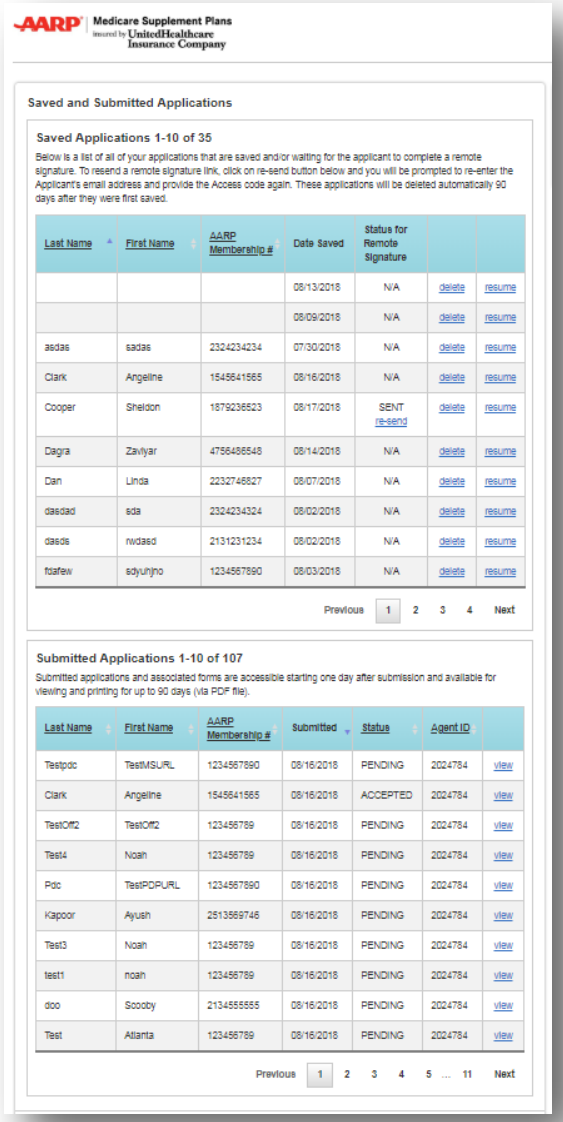
Medicare Supplement Applications

Saved Applications

- In-progress enrollment applications will be automatically deleted 90 days after they were last saved.
- When resuming an enrollment application, you must ask all questions and reconfirm all prior answers, as the consumer's status or medical conditions may have changed. Signatures must be recaptured.
    - To make a correction to an already sent remote signature application, click resume, fix the mistake and resend the application by going to the last page to click on the "launch remote signature" button
- Remote Signature status can also be found on this table. To resend a remote signature application to the consumer to sign, click on the "Re-send" button on the status column.

Submitted Applications

- Submitted enrollment applications and associated forms will be available for viewing and printing for up to 90 days.



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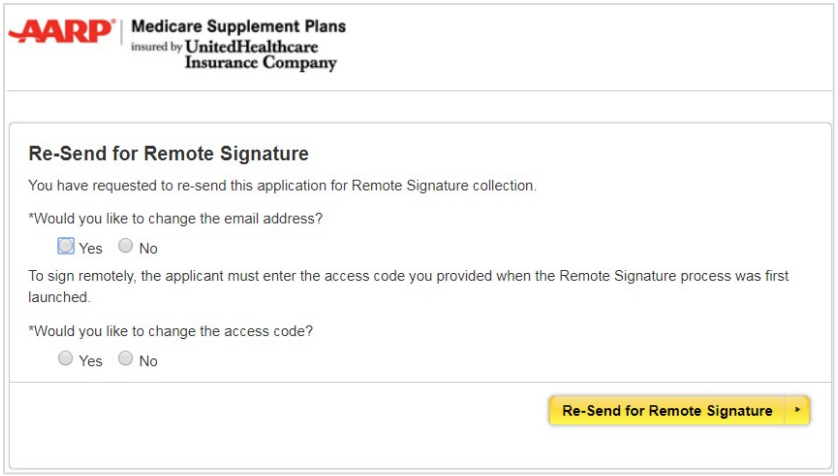
Medicare Supplement Applications

- To resend a remote signature application, click on the “re-send” button found on the saved application table.
- You will be provided the opportunity to change the consumer’s email address, if the consumer has directed you.
  - Consumer may provide us with one email address. Changing the email address for remote signature, will also change where we deliver other items that they may have agreed to early on (i.e. electronic plan documents).
- You are also given the option to change the access code, in the event the original code with forgotten or misplaced by the consumer.
- If a new email address is entered or if a new access code was generated, the consumer will receive two emails; one stating that the original application link has been disabled; and another with a new link to the application where, if applicable, the new access code can be used.



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Support & Resources

Support

For additional support with questions related to LEAN,please contact the Producer Help Desk (PHD):

- **Email** phd@uhc.com

Please include your full name, agent ID, contact information, and a brief description of your issue. Screen shots are also helpful if you receive an error.

- **Call** 888-381-8581 (Option 3)

Please be prepared to enter your agent ID.

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Resources

Reference and training materials are available on ***Jarvis***.

- User Guide
- FAQ
- Topical Job Aids
- Helpful Videos
- Sign Up for Training

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