



LEAN Email and Text Remote Signature

Job Aid

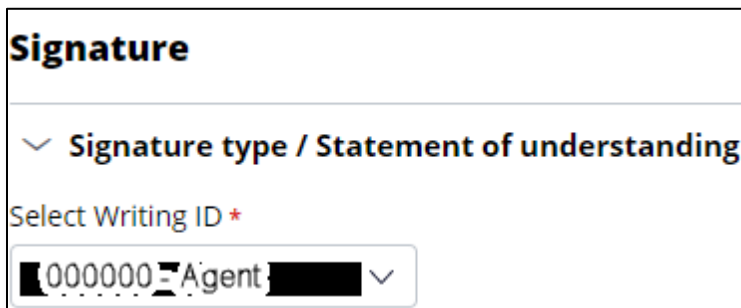


Email Remote Signature Process

Summary

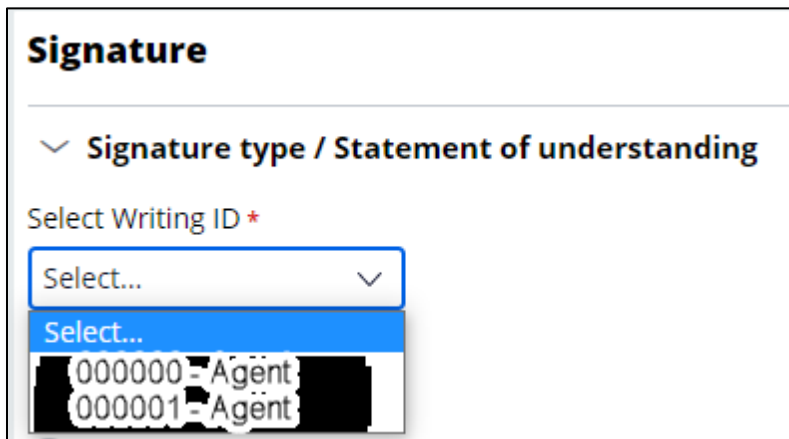
LEAN allows you to obtain the consumer's signature by Remote Signature via Email or Text via Adobe Sign. Remote Signature applications still must be completed within 24 hours of initiating the Adobe Sign process. You will only be able to use the Remote Signature options when online in the browser or online in mobile app. Email Remote Signature is covered in the next section. You can find Text Remote Signature instructions starting on Page 7.

Step 1: If you have one active Writing ID, it will be displayed in the dropdown.



The screenshot shows a form titled "Signature". Underneath, there is a section labeled "Signature type / Statement of understanding" with a dropdown arrow. Below this is the text "Select Writing ID *". A dropdown menu is open, showing a single option: "000000 - Agent" followed by a small dropdown arrow.

If you have more than one active Writing ID, select which one you want to use for the application.



The screenshot shows a form titled "Signature". Underneath, there is a section labeled "Signature type / Statement of understanding" with a dropdown arrow. Below this is the text "Select Writing ID *". A dropdown menu is open, showing two options: "000000 - Agent" and "000001 - Agent".

NOTE: If you access LEAN from Mira, you will not see the **Select Writing ID** dropdown.



Step 2: On the Signature page, select the **Sign via email with Remote Signature** option. Select your applicant's language preference. The signature disclaimer box will disappear and the instructions for Remote Signature will appear.

Select signature type *

Sign in LEAN now

Sign via email with Remote Signature

Sign via text with Remote Signature

Select language *

English Spanish

Step 3: Enter the consumer's email, your email, and the access code. You will create the Applicant access code (5 -15 characters) with the consumer. The consumer must remember the access code to access the Adobe Sign process. More detailed instructions will appear in LEAN when you select the Remote Signature option.

I attest that I have discussed with the beneficiary the benefits and rules for this plan and the beneficiary wishes to be sent this enrollment application

Applicant email * Applicant access code *

Agent email *

Send Applicant an Enrollment Receipt

E-mail address *

I verify the email address I've provided is correct and agree the enrollment receipt, which will contain my name, confirmation number, and plan information will **not** be sent via secure email.

Step 4: Tap or click the **Launch Remote Signature** button to proceed.

Send Applicant an Enrollment Receipt

E-mail address *

I verify the email address I've provided is correct and agree the enrollment receipt, which will contain my name, confirmation number, and plan information will **not** be sent via secure email.

Send Agent an Enrollment Receipt

The Remote Signature confirmation page will display with additional instructions and your LEAN confirmation number. The consumer will then receive an email from Adobe Sign with instructions to follow on how to proceed with the Remote Signature process. These instructions will take them to the Adobe Sign website.

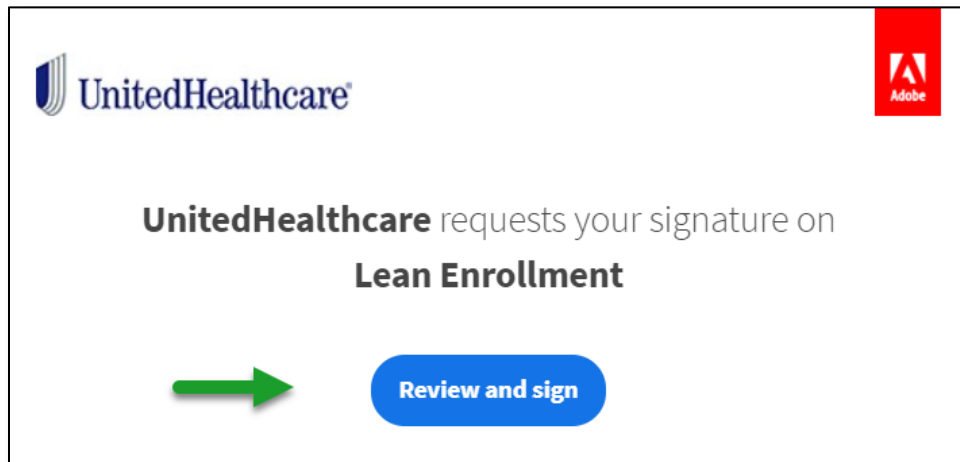
The application status can be viewed in My Applications under the Action Required tab.

Conf #	First name	Last name	Signed date	Status	Date submitted
1 E-23038091721	Rem	Sig Job aid		Remote Signature: In-Process	

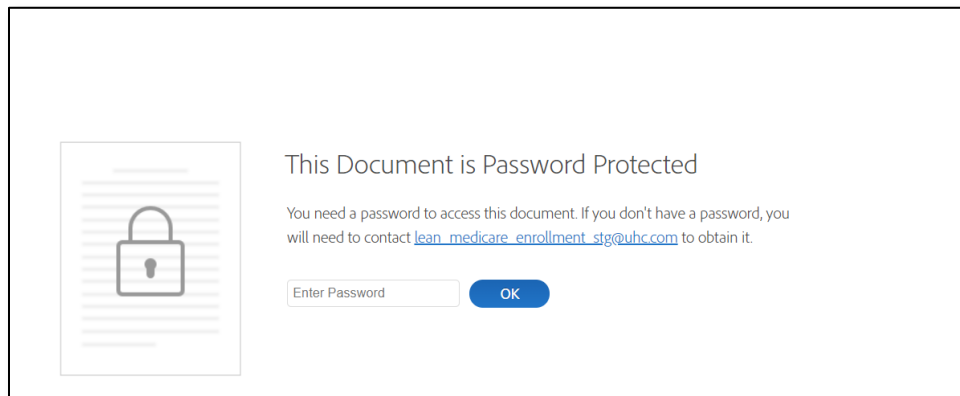


If the consumer has not finished signing, the status will be **Remote Signature: In Process**. If the consumer has failed the Adobe Sign process, the status will be **Remote Signature: Failed**. When the consumer completes the process, the application will move to the Submitted tab.

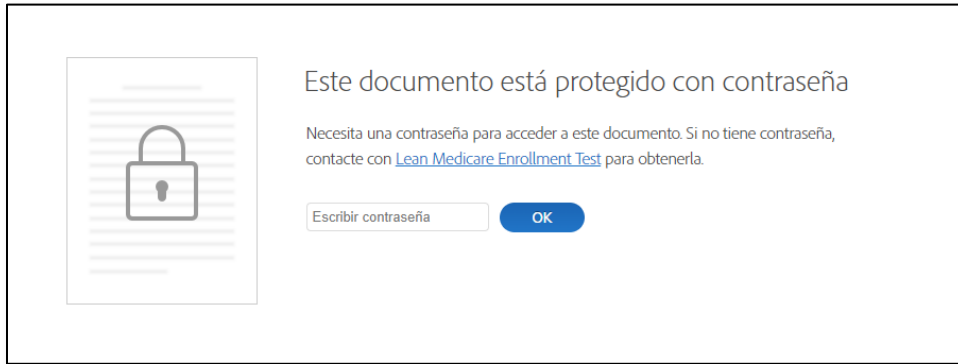
Step 5: Complete the Remote Signature process. It is recommended you be on the phone with the consumer to complete the Adobe Sign process. The consumer will receive an email from Lean Medicare Enrollment. The consumer must open the email and click on **Review and sign**.



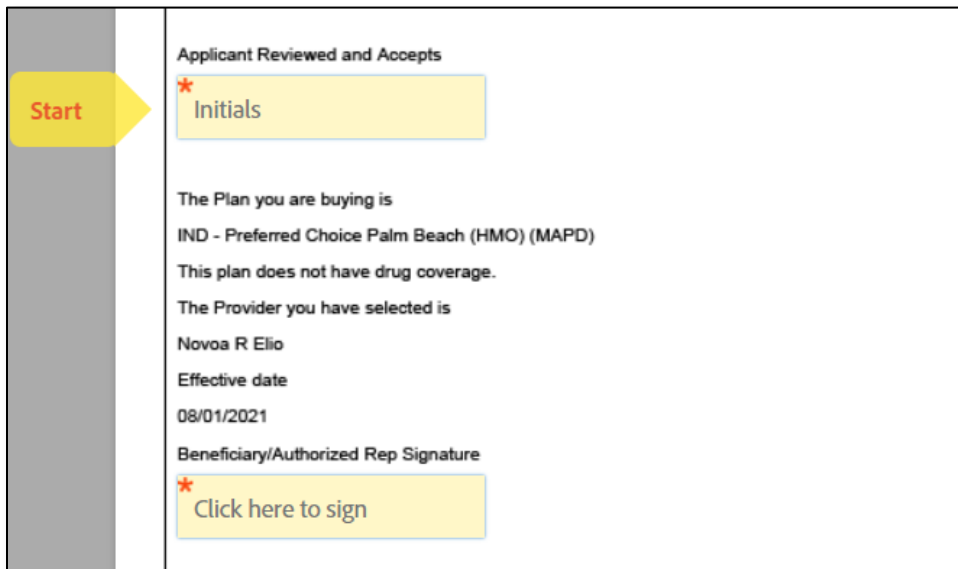
The consumer needs to enter the Access Code that you previously created in the **Enter Password** box and click **OK**. If the consumer enters an invalid Access Code three times, the application will go into **Remote Signature: Failed** status.



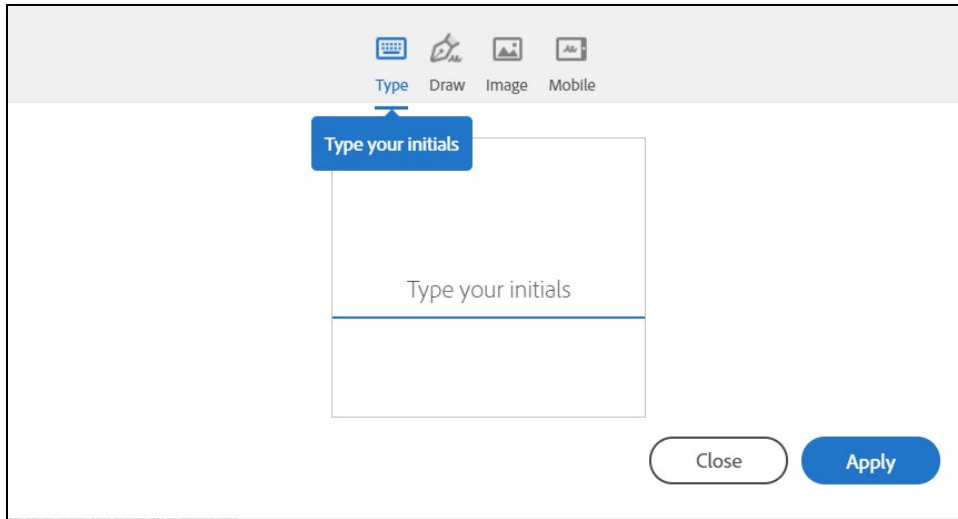
If you select the Spanish language option, the applicant receives the same instructions in Spanish.



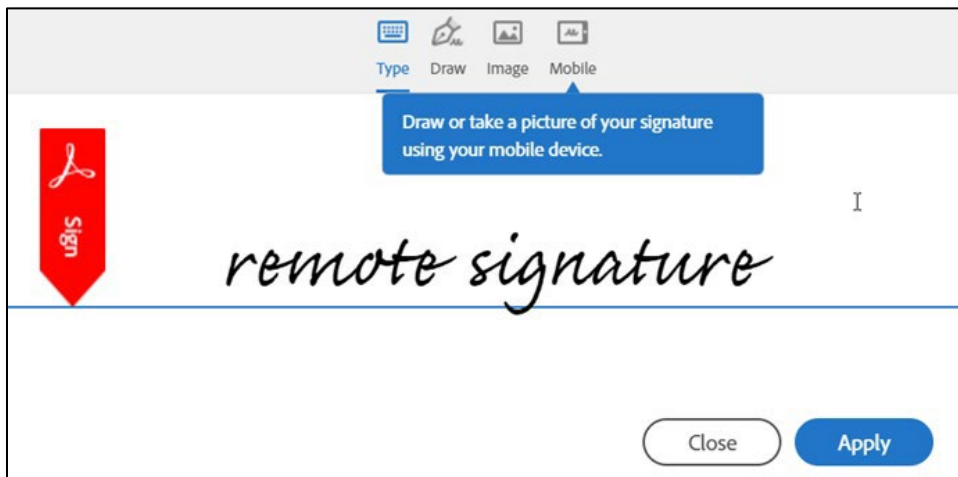
Step 6 After entering the **Access Code/Password**, the consumer will electronically initial and sign application. A copy of the application will open for the consumer to review and there will be areas indicated on the third page for initials and signature. The consumer must scroll down or click on the yellow Start tab until they reach the Applicant Reviewed and Accepts box where they need to enter their initials.



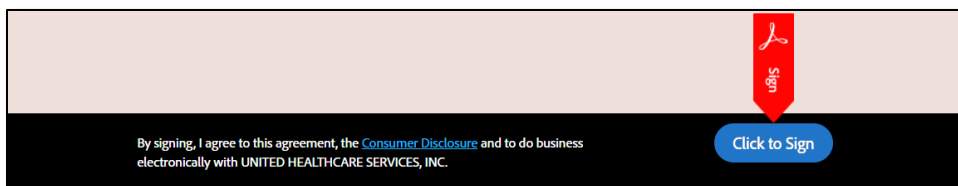
The consumer needs to click on the **Initials** box. The consumer has four options to create initials. They can choose the **Type your initials** option (recommended), draw the initials using a mouse or other device, use an image, or have the process sent to a mobile device via text with a link to sign. Once the consumer has selected a method and entered their initials, they must click the **Apply** button.



After the consumer enters their initials, the next signature area is for the consumer's name. Once the consumer clicks on **Click here to sign**, the signature box will open. The consumer's name will populate, and all the consumer needs to do is click on **Apply**.



The consumer needs to select **Click to Sign at the bottom of the page** to submit the application.



Step 7: Once completed, you and the consumer will receive an email confirmation. The application will show in **My Applications** as Submitted with the Adobe Sign signature date. When you click on the application, you will now see a **View App** button and a **Download App** button. If you select the **Download App** button, it will display the Adobe Sign document and signature.

Search All Applications						
Action Required		Submitted				
Conf #	First name	Last name	Signed date	Date submitted	HA conf #	
1	E-669001072221	Amilyn	Holdo	07/22/2021	07/22/2021	H-E669001072221
2	E-669002072221	Obi	Kenobi	07/22/2021	07/22/2021	Start HA
DOB 07/17/XXXX		Medicare ID XXXXXX4Mk73		Effective date 08/01/2021		
View App		Download App		Send Receipt		

Text Remote Signature Process

Summary

You can also obtain Scope of Appointment and Enrollment Applications by Text Signature via Adobe Sign. You can complete the enrollment process in LEAN in the previous manner until you reach the Signature Options page.

Step 1: If you have one active Writing ID, it will be displayed in the dropdown. If you have more than one active Writing ID, select which one you want to use for the application.

Signature

▼ Signature type / Statement of understanding

Select Writing ID *

000000 Agent ▼

Signature

▼ Signature type / Statement of understanding

Select Writing ID *

Select... ▼

Select...

Step 2: With the consumer's consent, you must click on the **Sign via text with Remote Signature** and the checkbox indicating their permission to receive the link to the application and provide the signature over text.



Step 3: Check the Yes box, which indicates the consumer wants to receive the link to the application to review and provide signature over text.

Step 4: Select your applicant's language preference. If you select Spanish, the consumer will receive information to sign the application in Spanish. The text remote signature process stays the same as it is in English.

Signature type / Statement of understanding

Select signature type *

Sign in LEAN now

Sign via email with Remote Signature

Sign via text with Remote Signature

Would the applicant like to receive the link to their application to review and provide signature over text? *

Yes No

Select language *

English Spanish

Step 5: Read, or have the consumer read, the Text Signature Disclaimer, in its entirety. Obtain the mobile phone number the consumer wishes to use and check the box indicating that the applicant has reviewed and accepts the text signature disclaimer.

Text Signature Disclaimer

By providing your mobile phone number, you agree to receive a one-time text message from UnitedHealthcare containing information about your application. You acknowledge that the texts containing your protected health information will be sent unencrypted and there is a risk of interception or disclosure of the contents of the text. You agree to the Texting Terms and Conditions at LINK. Message and data rates may apply. What is your mobile phone number?

Applicant has Reviewed and Accepts Text Signature Disclaimer

If you select Spanish as the applicant language preference, the instructions for Text Signature will be in Spanish.



Review the Signing with Text Signature information box. The rules for text signature are the same as with the email signature. You and the consumer must create an access code between 5 –15 characters long.

Signing with Text Signature

*Please note this application **cannot** be edited during an in-process Text Signature Request

Navigating on this Page:

- While signing with Text Signature, the applicant will be using Adobe Sign, a trusted company that provides electronic signing for documents.
- You may switch between signature options at the top of this page.

Submission Guidelines:

- The applicant will need to sign the application within 24 hours of when the "Launch Text Signature" button is clicked.
- If you are submitting an application **less than 24 hours from the effective date**, the applicant **must sign before 11:59 PM CST**.
- If the applicant signature is not captured before the effective date, then a new application with a new effective date will need to be completed.
- If the application is not successfully submitted within 24 hours, the status in the Action Required tab will read "Remote Signature: Failed"
- The agent can re-open the application in the Action Required tab. At this point, the agent can make any necessary edits and:
 1. Proceed with a new text signature request
OR
 2. Both parties can sign in-person within LEAN

Access Code:

- The text message will include a link that requires an Access Code to be entered.
- Please create an Applicant Access Code below.
- You must provide the Access Code to the applicant.
- The Access Code must between 5-15 characters long. You may include both numbers and letters. The code is not case sensitive.
- Please note the Access Code will expire after **three** failed attempts.

Step 6: Enter the consumer’s mobile phone number in the field. Reminder –just use the 10 digits. LEAN will add the parentheses and dash. Enter the agreed upon applicant access code.


Step 7: Click on the Launch Text Signature box.

Applicant mobile phone number * Applicant access code *

Send Applicant an Enrollment Receipt

Send Agent an Enrollment Receipt

Almost Done...



Please have the applicant sign within 24 hours to submit this application.

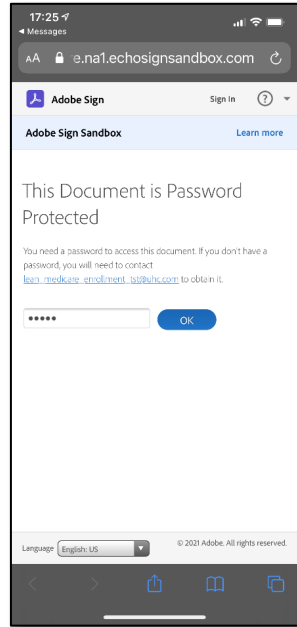
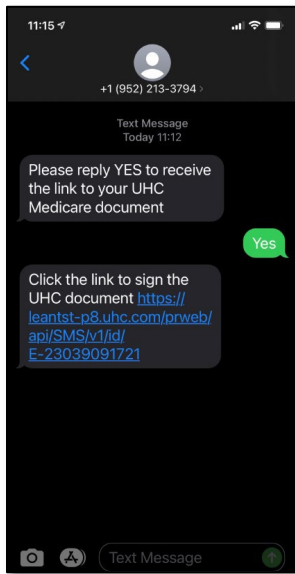
Confirmation # E-23041092021

Next Steps:

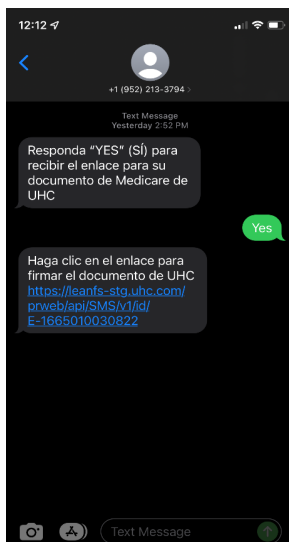
- Please tell the applicant to check their mobile phone for a text message from number **45202** or phone number ending in **2396**.
- Provide **Access Code** to the applicant.
- The text will include a link that requires the Access Code to be entered. Please note that Access Codes expire after three 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".
- 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 LEAN.
 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.



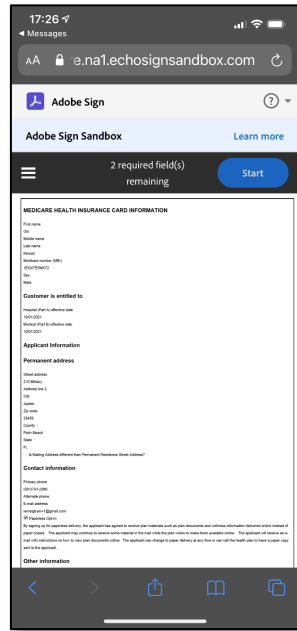
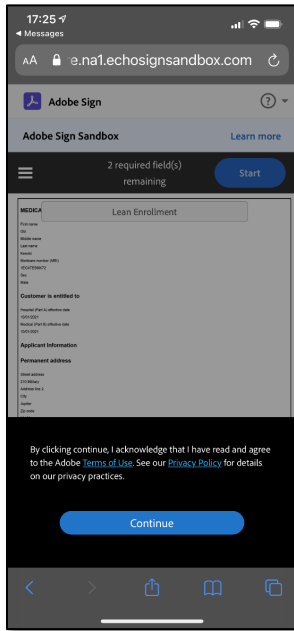
The consumer will receive a text on their phone. The text will say “Please reply YES to receive the link to your UHC Medicare document.” The consumer needs to type YES and hit the send icon. Once they do that, they will get a response that asks them to Click the link to sign the UHC document and a link they need to click. Once they click on the link, they will be directed to the Adobe Sign website sign-in page where they will need to enter the agreed upon access code and click **OK**.



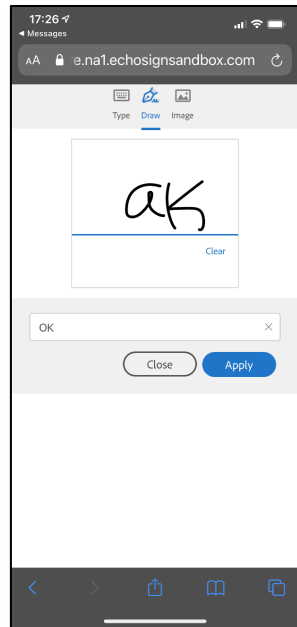
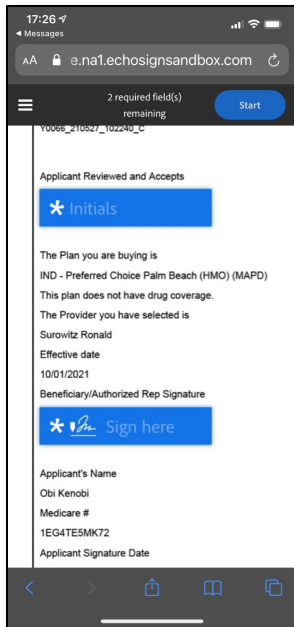
If you select the Spanish language option, the applicant will receive the same instructions in Spanish.



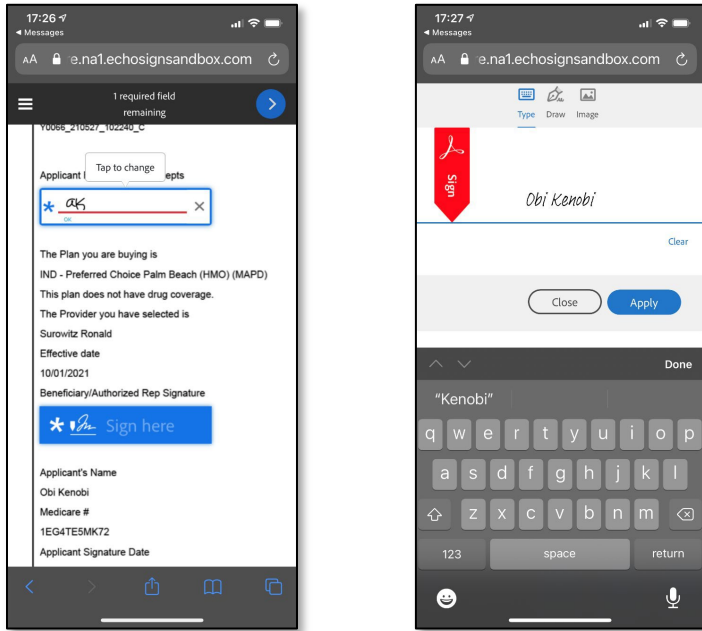
Once the consumer clicks on the OK button, they will see the Scope of Appointment or Enrollment document. They must click on the **Continue** button at the bottom of the screen. This will open the document for review and signature.



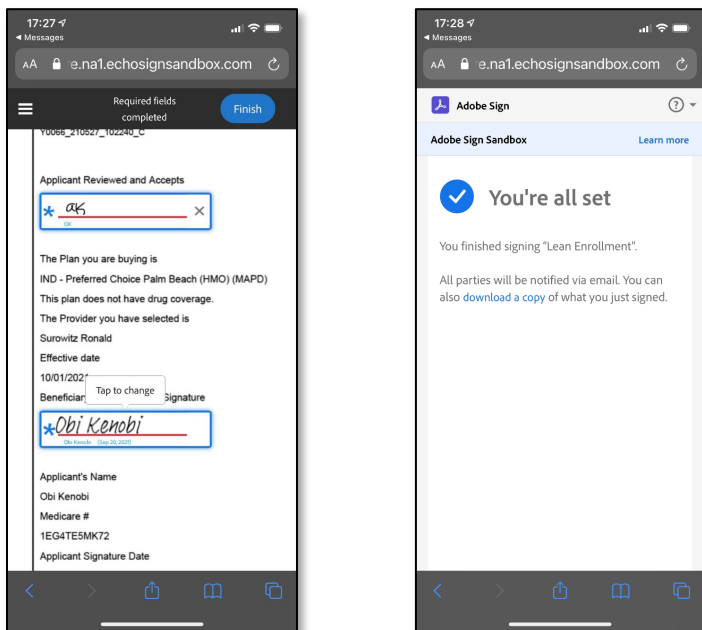
The consumer can scroll down and make the document larger or smaller on their device to review and move to the initial and signature section.



The initials box is the first field to complete on the Enrollment document. The consumer must click on the Applicant Review and Accepts **Initials** box to begin. They may type their initials, draw them using their finger or stylus, or use an image to complete this section. Once the consumer has placed their initials in the box, they need to click on **Apply**.



The next area to sign is the signature area. The consumer will need to click on **Sign hereto** allow the signature box to open. The consumer's name will populate, and all the consumer needs to do is click on **Apply**.



Once the consumer has clicked the Apply button, they need to click the **Finish** button in the upper right-hand corner of their screen to complete the process.

Action Required		Submitted			
Conf #	First name	Last name	Signed date	Date submitted	HA conf #
1 E-23041092021	Obi	Kenobi	09/20/2021	09/20/2021	<input type="button" value="Start HA"/>

You may return to LEAN > My Applications > Submitted tab to see the completed application and, if appropriate, begin the Health Assessment process.

If you have questions, please call the Producer Help Desk (PHD) at 888-381-8581.

