

This Just In...



Remote Signature via DocuSign Now Available in LEAN

Note: This applies to all Medicare Advantage (MA) and Prescription Drug (PDP) plans including Special Needs Plans (SNPs).

Meeting consumers' needs is an important part of an agent's job! Now LEAN offers the option to take a remote signature via DocuSign, giving agents a timely, secure and accurate way to meet those needs.

Remote signature is an option for those times when you have already presented the plan to the consumer in person but need to complete the enrollment remote, or it is not feasible to meet in person with the consumer.

Potential scenarios

- You met a consumer in person one-on-one or at formal or informal marketing event and they either are not ready to fill out the application or do not want to stay after the meeting to enroll. They call later wanting to enroll.
- A consumer reaches out to you in the final days of the election period or month and it's not feasible for you to make the trip to meet them in person, so you conduct the meeting over the phone.
- A consumer is referred to you, but they live a distance from you that isn't feasible to have an in-person meeting, so you conduct the meeting over the phone.
- The consumer requests the meeting be conducted over the phone, as they do not wish to have the agent in their home or to meet in a public setting.

Important reminders

- This applies to MA (including SNPs) and PDP plans – remote signature for Medicare Supplement plans coming soon!
- The member has 24 hours to sign and complete the application from the time you contacted the consumer.
- We recommend that the agent be on the phone with the member for assistance as they are signing the application.
- The remote signature option is only available when accessing LEAN online.
- For instructions for telephonic plan presentations and scope of appointment guidelines, please refer to your agent guide.
- "Applications" in "Not Complete" status will now be automatically deleted after 30 days.

Resources

To learn more about taking a remote signature, we've put together some helpful resources:

- [Remote Signature job aid](#)
- [Remote Signature video](#)

Questions?

- **Additional questions?** Contact your agent manager.
- **Agent Support via Producer Help Desk (PHD)**
 - Phone: 888-381-8581
 - phd@uhc.com
 - Secure email request via [Jarvis](#). Go to the Contact Us page and click 'Get Started', and then click 'Create SR'.
- **Compliance questions?** Email compliance_questions@uhc.com.

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