UnitedHealthcare® LEAN™ User Guide





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 an MA/PDP application using the LEAN website or mobile app
- Understand the steps to complete an AARP Medicare Supplement application using LEAN
- Locate your saved and submitted MA/PDP and Medicare Supplement applications
- Locate resources you can go to for help



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.
- Signature capture is a touchenabled part of the tool.
- The provider search directory website is one click away.
- Enroll your members in less time.

- Available on mobile tablets and computers.
- No signature pad required!
- Same log in as Jarvis!
- Cannot sell in unlicensed states
- 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!
- Applications are stored digitally in LEAN.
- Helps prevent errors!

Getting Started

How To Access LEAN





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

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.

Technical Requirements



| Mobile Requirements | Computer Requirements |
|--|---|
| Agents download the LEAN mobile app on tablets. | Agents may use a computer to access the LEAN website. |
| 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 | 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 mobile app can be used offline, but an internet connection is required to upload applications or access other resources. | 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 generation)
iPad Pro
iPad Air
iPad Mini
Samsung Galaxy Tab A
Samsung Galaxy Tab E
Samsung Galaxy Tab 4

Signature Requirements



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

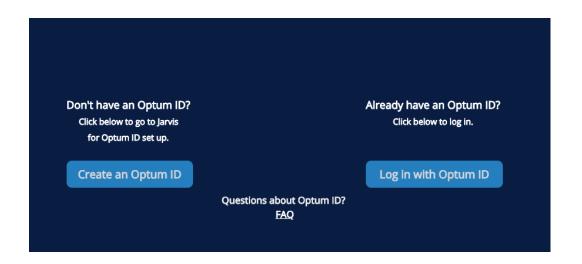
If you use a Topaz signature pad for Medicare Supplement applications, you need to download and install the SigWeb plugin from Topaz:

http://www.topazsystems.com/Software/sigweb.exe



Signing Into LEAN

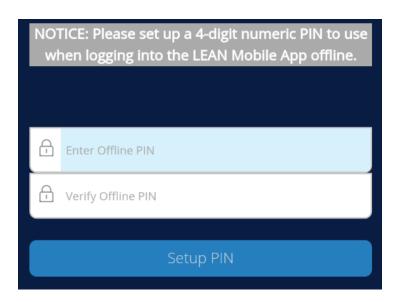
- Open the LEAN mobile app or the LEAN URL
- You will log in using the same Optum ID credentials you use to log into Jarvis.
 - If you have not yet created an Optum ID, click Create an Optum ID.
 - If you already have an Optum ID, click Log In with Optum ID.



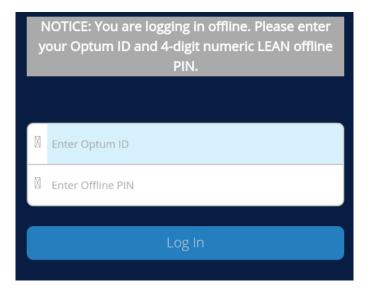


Creating Your Offline PIN

- 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.



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



Completing a MA/PDP Enrollment Application

Before You Begin



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

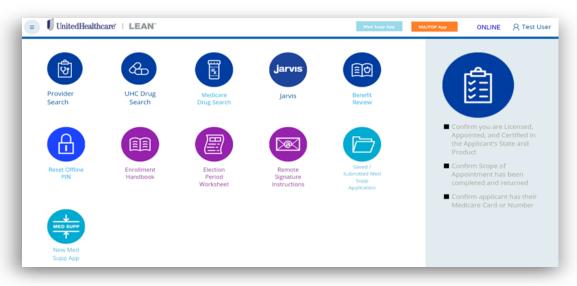
- The mobile app can be used online or offline; the website is only online
- You need to be online in order to use:
 - The provider search website
 - Automated election period logic
 - Remote signature
- Members do not need an email to enroll, but do need an email for:
 - Receiving an enrollment receipt
 - Opting into paperless document delivery
 - Remote signature
- You cannot print applications from LEAN



Home Page



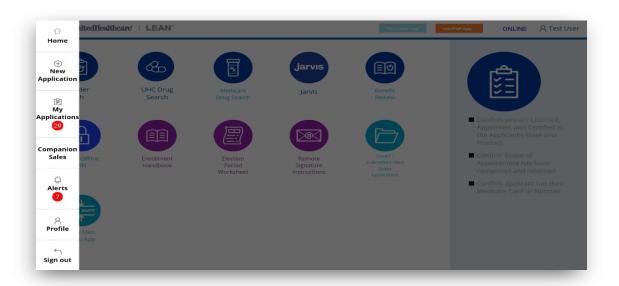
- Begin a new application using the orange (MA/PDP) button across the top.
- You can note if you're online or offline according to the indicator in the upper right.
- Your name also displays in the upper right.
- Helpful resources are available behind the buttons on the Home Page.
 - Blue buttons are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





Home Page

- Press the hamburger button in the upper left to access a navigation bar of additional buttons.
- New Application opens a new MA/PDP application.
- The My Applications button is where your 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.



Navigation





- Every page in the 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 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.



Medicare Page



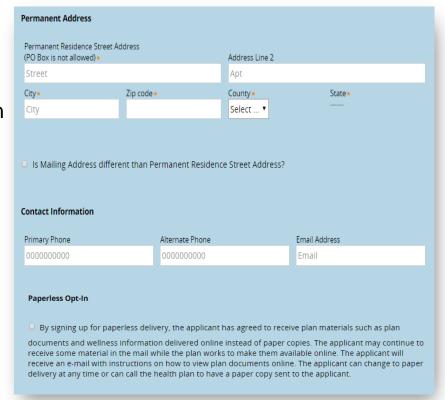
- The first page of the application is the Medicare Information page.
- The Medicare Number field will accept both Health Insurance Claim Numbers (HICNs) and Medicare Beneficiary Identifiers (MBIs).
- The Medicare Number field has logic built in to ensure you correctly enter the HICN/MBI.
- Discard will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



Applicant Info



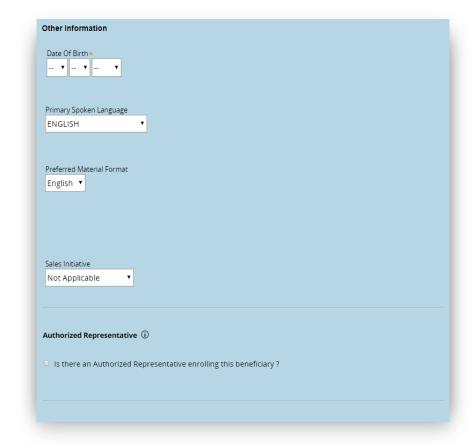
- The second page of the application is the Applicant Info page.
- Once the zip code is entered, the available county options will automatically populate in the County field.
- Once a county is selected, the state will automatically populate.
- If the member has a separate mailing address, enable the 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.







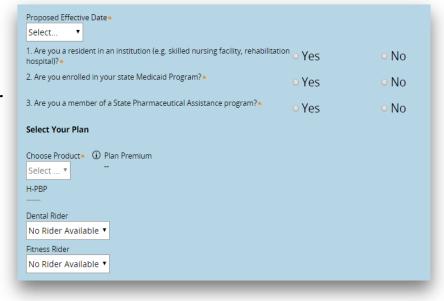
- Additional optional fields on the Applicant Info page include:
 - Primary Spoken Language
 - Preferred Material Format
 - Sales Initiative
- If the member has an Authorized Representative enrolling them, enable the checkbox at the bottom of the page and complete the optional Authorized Representative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



Plan Selection



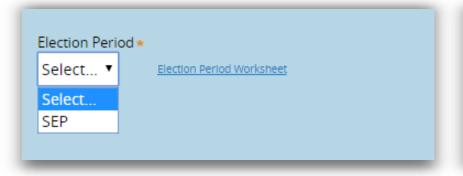
- The third page of the application is the Product/Plan page.
- The Proposed Effective Date must be selected before the plan options display.
- The Institution and Medicaid questions will open additional required fields if you answer "Yes" to them.
- Only plans for the zip code previously entered will 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.

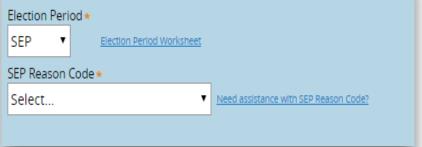




Election Period Selection

- 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.

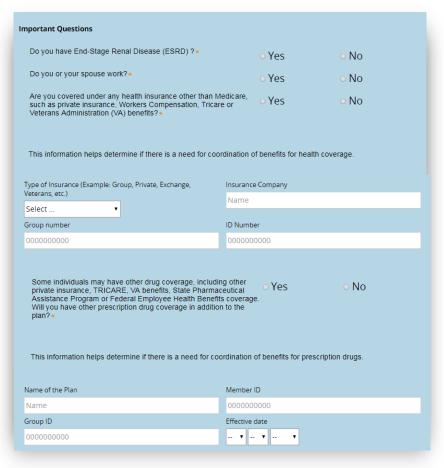








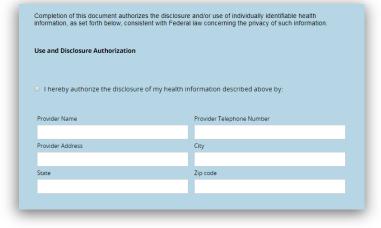
- The fourth page of the application is the Questionnaire page.
- All questions displayed on this page are required.
- If you answer Yes to the Other Health or Other Drug Coverage questions, the open entry fields may become required.
- Please note that these fields have character limitations.





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.



| Do you have a Chronic Condition?★ | Yes | | No |
|---|---------------------------|---------------|----------------------------|
| | | | |
| ∨ Chronic Questionnaire | | | |
| | | | |
| I. <u>Diabetes</u> ("Yes" to 1 or 2 pre-qualifies the candidate.) | | | |
| Have you ever been told by a doctor or clinic that you have (too much sugar in the blood or urine)? | ^{diabetes} • Yes | o No | o Not Sure |
| Have you ever been prescribed, or are you taking insulin or medication that is supposed to lower the sugar in your blood? | | o No | o Not Sure |
| II. <u>Chronic Heart Failure</u> ("Yes" to question 1 or questions question 2 or 3 only requires further verification.) | 2 and 3 pre-qualifie | s the candida | te. "Yes" to |
| Have you ever been told by a doctor or clinic that you have lad failure or Congestive Heart Failure (weak heart or weak heart) | | o No | Not Sure |
| 2. Have you ever had problems with fluid in your lungs and sw your legs in the past, accompanied by shortness of breath, due heart problem? | | o No | o Not Sure |
| During the past 12 months, have you been counseled or edulation about weighing yourself daily due to a heart problem? | o Yes | o No | Not Sure |
| III. <u>Cardiovascular Disorders</u> ("Yes" to any of the question: | s (1–6) pre-qualifies | the candidate | ∋.) |
| Have you ever been told by a doctor or clinic that you have a cardiovascular disorder such as cardiac arrhythmia, coronary a disease, peripheral vascular disease, or chronic venous thromboembolic disorder? | | o No | Not Sure |
| Have you ever been told by your doctor or clinic that you have irregular or abnormal heartbeat, poor circulation in your legs, arteries or a heart attack? | | o No | Not Sure |
| Have you ever had multiple episodes of chest pain, pain in your blood clots requiring medical attention? | our legs O Yes | o No | Not Sure |
| Have you ever been prescribed medications to thin your block including Warfarin or Clopidogrel? | ^{od,} ○Yes | o No | Not Sure |
| 5. Do you have a pacemaker or internal defibrillator? | Yes | o No | Not Sure |
| 6. Have you had angioplasty, stents or bypass on your heart or | | o No | Not Sure |
| | | | |



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.





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 wordfor-word to the member, or the member must be given time to read it and accept the corresponding checkbox.
- LEAN offers 3 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 wordfor-word to the member, or the member must be allowed to read and accept it.

| elected Plan | |
|--|--------------|
| Plan | Plan Premium |
| ND - AARP MedicareComplete (HMO) (MAPD) Premium | \$0.00 |
| Total Monthly Premium | \$0.00 |

Payment Disclaimer

If you have a monthly plan premium, you can pay your monthly plan premium (including any late enrollment penalty that you currently have or may owe) by mail, Electronic Funds Transfer (EFT) each month, or we will provide you an invoice for Direct Payment. You can also choose to pay your premium by automatic deduction from your Social Security or Railroad Retirement Board (RRB) benefit check each month.

If you are assessed a Part D-Income Related Monthly Adjustment Amount (IRMAA), you will be notified by the Social Security Administration (SSA). You will be responsible for paying this extra amount in addition to your plan premium. You will either have the amount withheld from your Social Security benefit check or be billed directly by Medicare of RRB. DO NOT pay UnitedHealthcare the Part D-IRMAA. People with limited incomes may qualify for extra help to pay for their prescription drug costs. If eligible, Medicare could pay for 75% or more of your drug costs including monthly prescription drug premium, annual deductible, and co-insurance.

Additionally, those who qualify will not be subject to the coverage gap or a late-enrollment penalty. Many people are eligible for these savings and don't even know it. For more information about this extra help, contact your local Social Security at 1-800-722-1213. TTY users should call 1-800-325-0778. You can also apply for extra help online at www.Socialsecurity.gov/prescription help.

If you qualify for extra help with your Medicare prescription drug coverage costs, Medicare will pay all or part of your plan premium. If Medicare pays only a portion of this premium, it is recommended you choose the Direct Pay or EFT option.

This Disclaimer has been communicated to Applicant and Applicant agrees

Premium Payment Option *

- Electronic Funds Transfer (EFT)
- Direct Pay (Monthly Statement)
- SSA/RRB (Social Security Administration or Railroad Retirement Board)

Signature Page



Select Signature Type .

- Sign in LEAN now
- Sign via email with Remote Signature
- 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.

Standard Signature Page



- 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 and 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.



Standard Signature Page



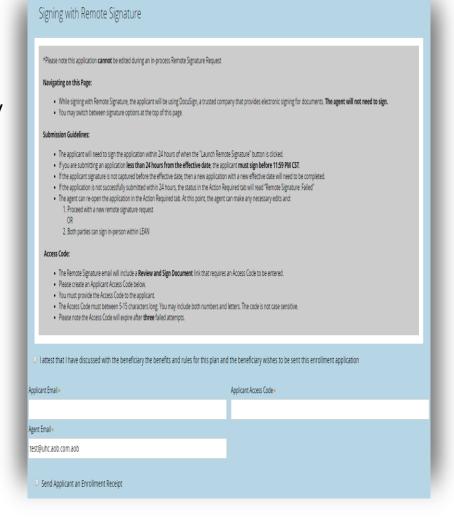
- When using the LEAN website, you have the option for a Shared Residence Application.
- After enabling the Shared Residence Application checkbox, you will be able to choose which fields to duplicate in the second application.
- Use the "Select All" option if you want all fields duplicated.
- The second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





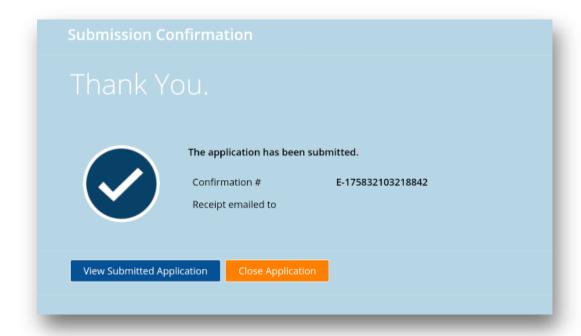
Remote Signature

- 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.





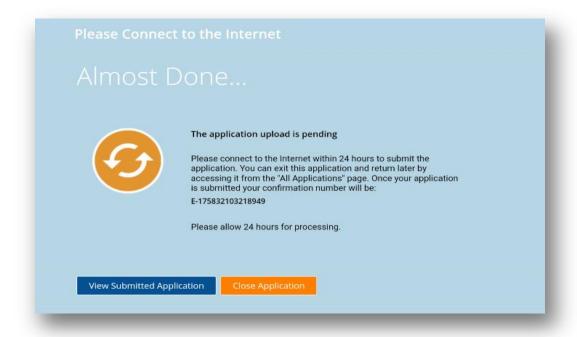
Online Submission Confirmation



- When an application is completed online, the online Submission Confirmation screen finishes the process.
- 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.
- Remember to always double-check your application is Submitted in My Applications.



Offline Submission Confirmation

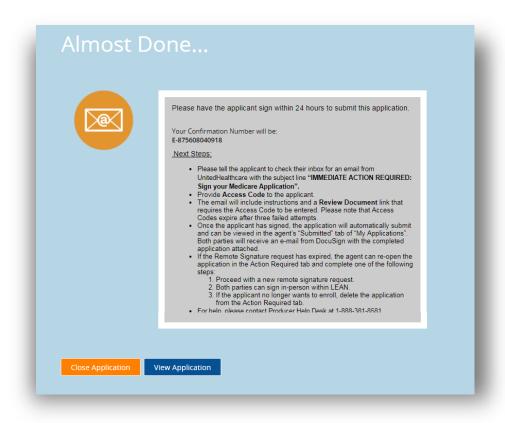


- When an application is completed offline, the offline Submission Confirmation screen finishes the process.
- This screen has your confirmation number and a reminder to upload the application within 24 hours.
- You may view the submitted application, the enrollment receipt, or close the application.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



Remote Signature Confirmation

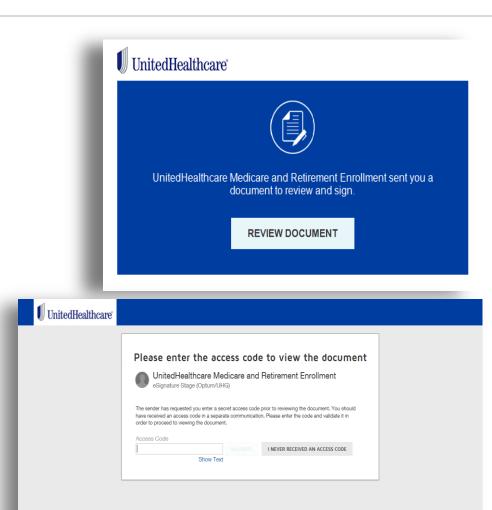
- When an application is completed using remote signature, the remote signature Submission Confirmation screen finishes the process.
- This screen has your confirmation number and instructions on the remainder of the remote signature process as covered previously.
- You may view or close the application.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





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.

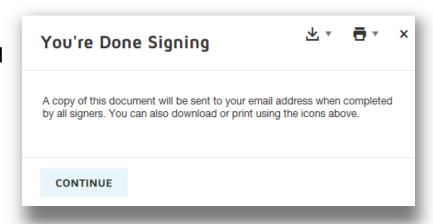




Remote Signature

- 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.





Completing an AARP Medicare Supplement Enrollment Application

Before You Begin



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

- ✓ You must be online to take a Medicare Supplement application in LEAN.
- ✓ You must provide the consumer with the full AARP Medicare Supplement enrollment kit. 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 via signature pad or touch device.
- ✓ 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.
- When using online enrollment, applicants will have two billing options Electronic Funds Transfer (EFT) or coupon payments via check.

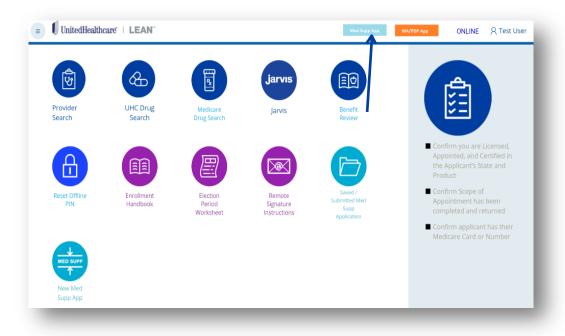




Let's Get Started



- 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.

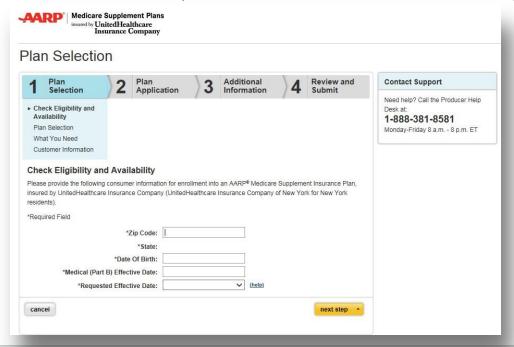


Plan Selection



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 (includingfuture 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 onlineapplication

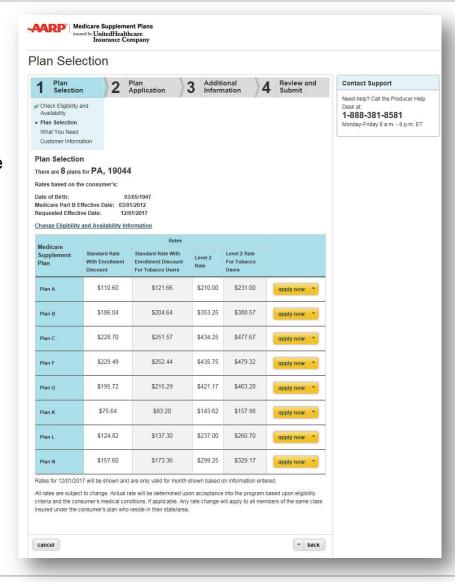


Plan Selection



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.

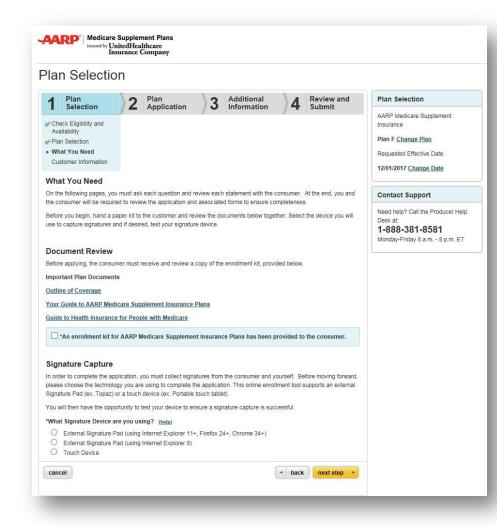


Plan Selection



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 device to be used when capturing the electronic signatureeither via signature pad or touch device.
- You will also be given an opportunity to test your signature capture device. This is optional.
 - Tip: Signature pads require the SigWeb plugin from Topaz.

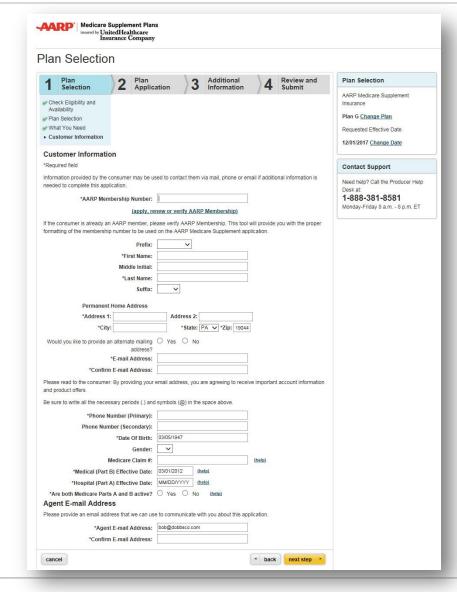


Plan Selection



Consumer Information

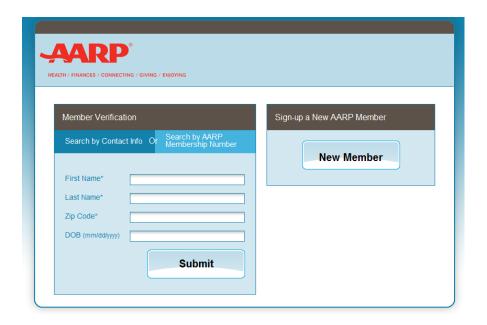
- AARP membership is required to enroll in an AARP Medicare Supplement Plan. Please click on the link next to the corresponding field to apply, renew and verify the consumer's AARP membership.
- Please fill out the consumer and agent information on this page. Any information that was entered on the previous page will prepopulate 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.



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

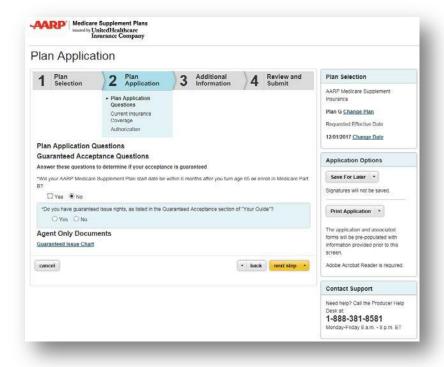
Click on "New Member" to sign-up a consumer for AARP Membership.

Plan Application



Guaranteed Acceptance

- Please answer all questions on this page. The responses to some of the Guaranteed Acceptance questions have been prepopulated 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.
- As you enter the consumer's answers to questions, the tool displays only the subsequent questions required for the consumer.



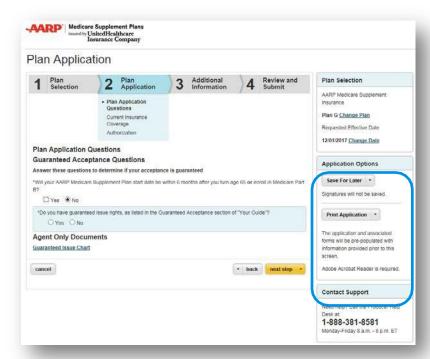
Print and Save for Later



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 via signature pad or touch device.



Print

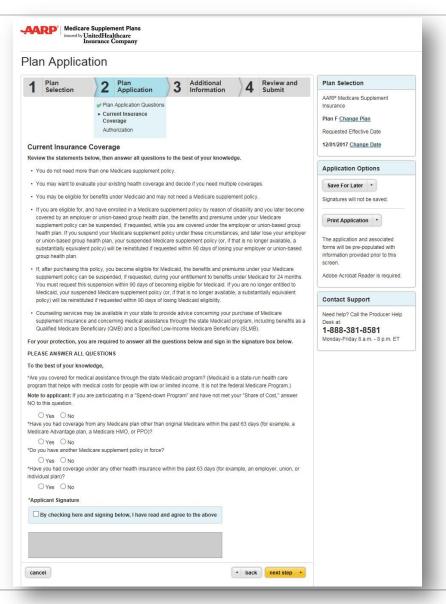
 You can print an application with the data you have entered thus far and submit the application via mail, if you or the consumer desires.

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.

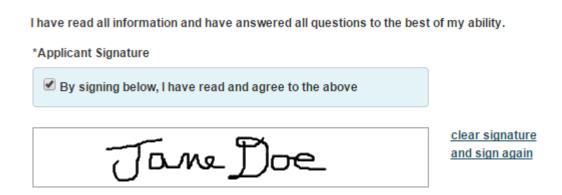


Plan Application



Consumer Signature

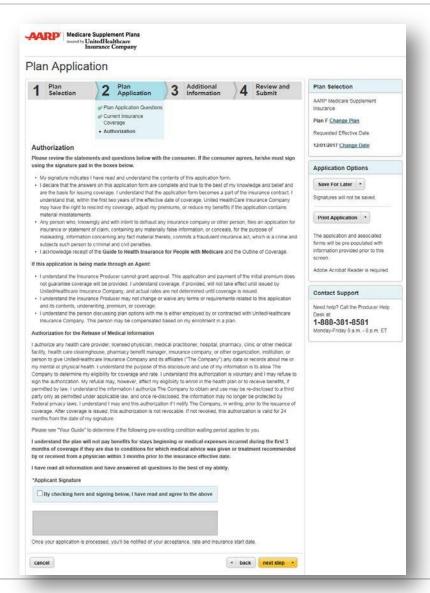
- The consumer must sign the application using a signature pad or touch device.
- Please have the consumer consent to the statements above by checking the box to activate the signature area below and then sign within the signature box. Their signature will appear on the screen.
- To clear and re-sign, the consumer will need to click the "clear signature and sign again" link next to the signature box.





Review and Sign

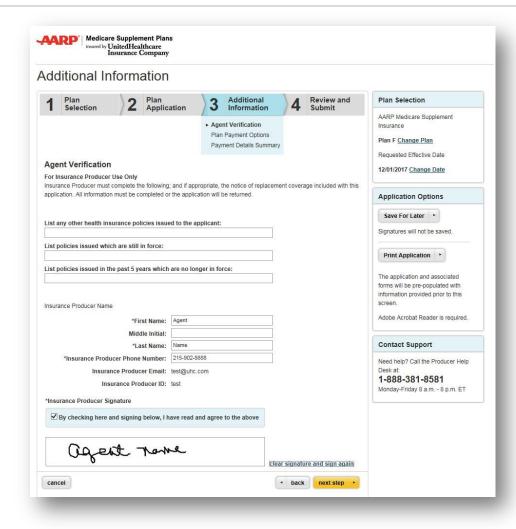
- The consumer must be able to read all of the statements on this page and agree.
- If the consumer agrees, he/she needs to sign, using the signature pad or touch device in the boxes indicated.





Agent Verification

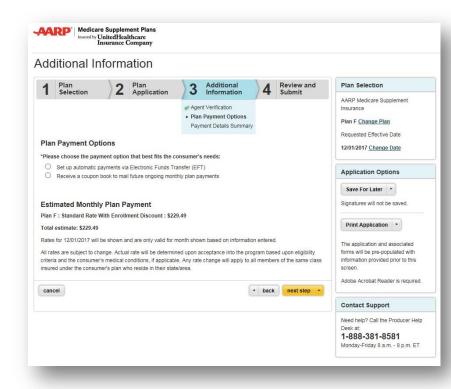
- As an agent, you must complete the information on this page. Leave blank if the questions do not apply.
- Sign your name, using the signature pad or touch device, to confirm you have read and agree with the information on this page.





Plan Payment Options

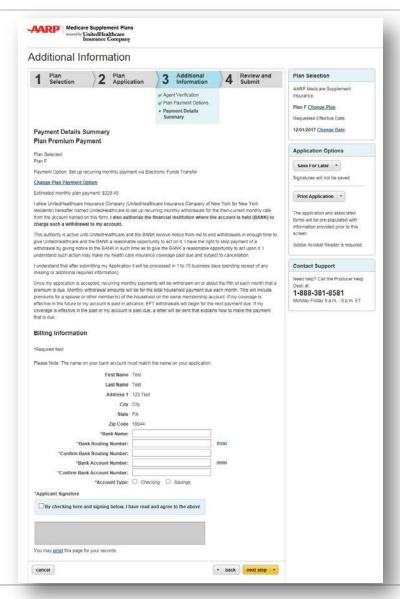
- Choose the payment option that best fits the consumer's needs. The consumer can choose either monthly coupon booklet payments OR recurring EFT.
- An estimated monthly plan rate is calculated and provided. This rate is based on the answers provided. It will not include discounts, such as multi-insured 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.





Payment Details Summary

- Depending on which option was selected on the previous page, you may be presented with the following EFT form.
- 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.



Electronic Plan Documents

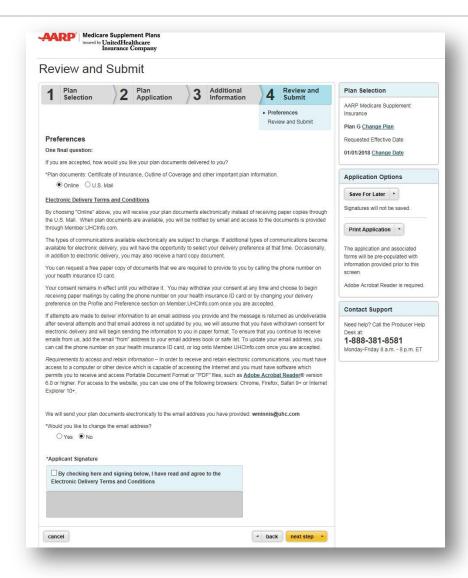


Preferences

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

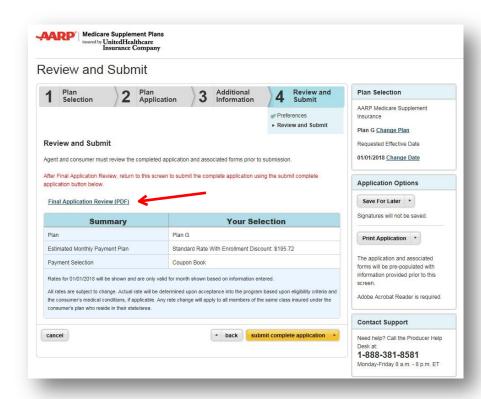
The types of communications available electronically are subject to change. If additional types of communications become available for electronic delivery, the consumer will have the opportunity to select their delivery preference at that time.





Final Application Review

- Before submitting the application, you are required to have the consumer review all information on the application and associated forms in Acrobat PDF.
- 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.
- Upon submission, we strongly encourage that you provide a printed copy of the enrollment application and associated forms to the applicant.



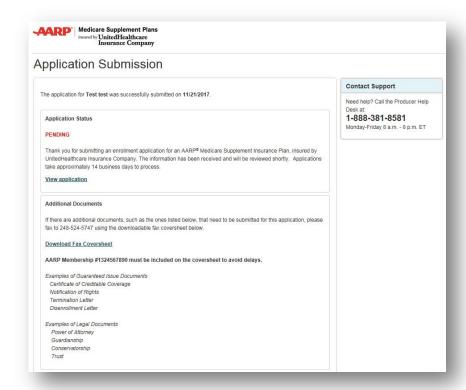
Note: For privacy and security purposes, agents are prohibited from saving the application PDF to their computers, jump drives and other portable storage devices. Agents can access the application via LEAN under "Saved/Submitted Applications".

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.
- 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.

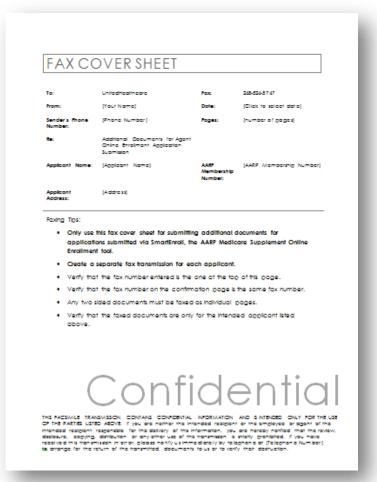


Confirmation emails will be sent to you and the consumer within 10 minutes after the application is submitted.

Application Submission



- 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 via SmartEnroll.
- 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.

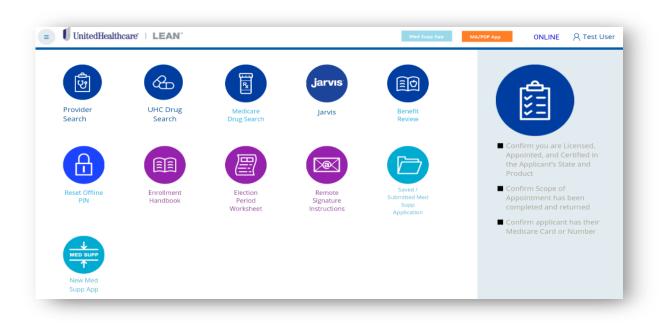


Viewing Your Applications

Locate Your Applications



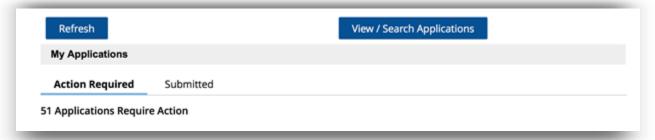
- Both MA/PDP and Medicare Supplement applications can be viewed from the LEAN Home Page.
 - MA/PDP applications are viewed by clicking the "My Applications" button on the hamburger menu on the left side of LEAN.
 - Medicare Supplement applications are viewed by clicking the teal "Saved/Submitted Med Supp Applications" button on the Home Page.





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.



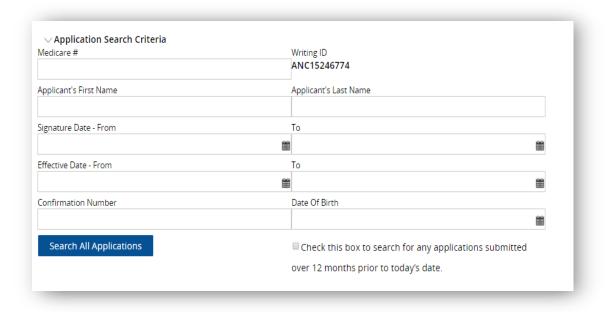
- Applications can have one of several statuses:
 - "Not Complete" for saved applications
 - "Not Submitted" for applications have not been uploaded
 - "Remote Signature: In Process" when the member has not yet signed their DocuSign application.
 - "Remote Signature: Failed" when the member has declined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



MA/PDP Applications

- All submitted applications are on the Submitted tab.
- While on the mobile app, you can see all of your submitted applications, but you cannot open and view them.
- To view them, use the website. On the website, you can view submitted applications and delete incomplete applications.
- On the website, only the past 60 days' worth of applications will display automatically.

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





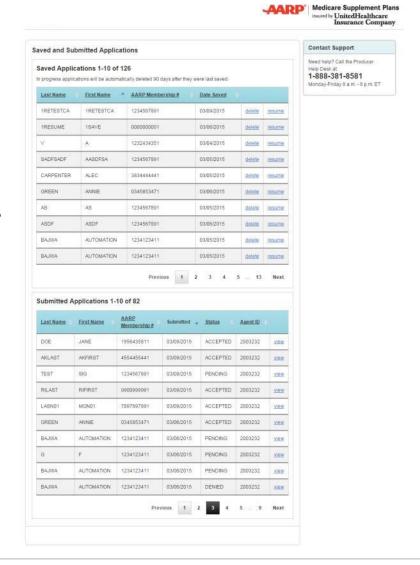
Medicare Supplement Applications

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 via signature pad or touch device.

Submitted Applications

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



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 5)
Please be prepared to enter your agent ID.

Resources



Reference and training materials are available on *Jarvis*.

- User Guide
- FAQ
- Topical Job Aids
- Helpful Videos
- Webinar for new LEAN users
- Annual Updates Webinar for veteran LEAN users