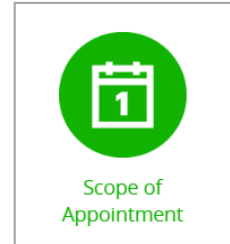LEAN now allows you to take an electronic Scope of Appointment (SOA)*. The electronic SOA is available on the LEAN website and mobile app, and can be used online or offline on the mobile app. The electronic SOA can be signed by touch/mouse signature or Remote Signature.

*Rules for obtaining a SOA have not changed. See your Agent Guide or the Sales Policy Scope of Appointment job aid for more information on SOA rules.

Step 1 **On the Home Page, select the green Scope of Appointment button.** This will open the electronic Scope of Appointment form.

Step 2 **The first page is the Scope of Appointment form.** You will have to complete all of the required fields on the form before you are able to proceed. This includes the plan types you discuss and the consumer's demographic information.

Scope of Appointment

Step 3 **The last page is the signature page.** The electronic SOA must be signed by the consumer. This can be done either by a standard touch/mouse signature or by using Remote Signature.

The Remote Signature process for SOA is the same as it is for enrollment applications. Please see the Remote Signature Job Aid if you need more information.

SoA Details	Signature
Signature Type*	● Sign in LEAN now
	○ Sign via email with Remote Signature

After the SOA is signed or the remote signature request sent, you will receive a confirmation number beginning with an S for your SOA.

Thank you.

The Scope of Appointment has been completed

Confirmation #   S-222811080719

Step 4 **Electronic SOAs that you've taken can be viewed in My Applications.** Open the **My SOA Confirmations** tab to view your SOAs. The most recent 60 days will be viewable by default; use the **Search Criteria** to look up any SOAs.

	Confirmation Number	First Name	Last Name	Signed Date	Status	Date Completed
Action Required **Completed**						
1	S-222811080719	test	test	8/7/2019	Completed	8/7/2019

View SOA   Download SoA