LEAN now allows you to obtain the consumer's signature by Remote Signature via DocuSign. Remote Signature applications still have to be completed within 24 hours of initiating the DocuSign process. **You will only be able to use the Remote Signature option on the LEAN website via the browser on your laptop or mobile device.**

Step 1 On the Signature page, select the Sign via email with Remote Signature option. 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

Step 2 Enter the consumer's email, your email, and the access code. You will create the access code with the consumer. The consumer must remember the Access Code to access the DocuSign process. More detailed instructions will appear in LEAN when you select the Remote Signature option.

The consumer will receive an email to complete the DocuSign process. You will receive an email when the consumer completes the process.

Applicant Email*	Applicant Access Code*
Agent Email*	

Step 3 Tap or click the Launch Remote Signature button to proceed. The Remote Signature confirmation page will display with additional instructions and your LEAN confirmation number. The consumer will then receive an email from DocuSign with instructions to follow on how to proceed with the Remote Signature process. These instructions will take them to the DocuSign website.
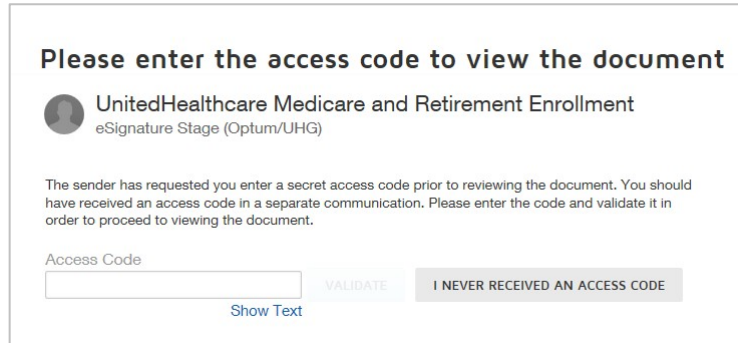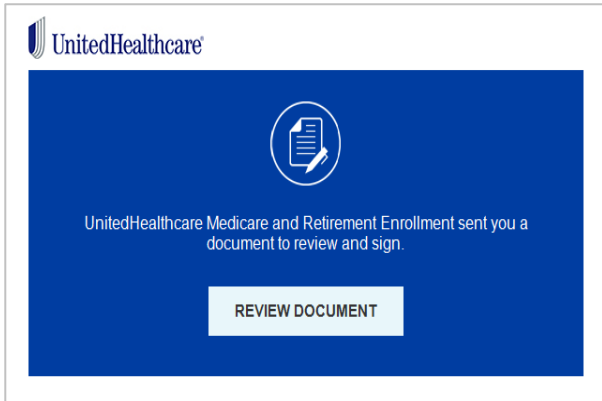
The application status can be viewed in My Applications under the Action Required tab.

	Conf#	First Name	Last Name	Signed Date	Status▾	Date Submitted
1	E-874462032718	Test4	Remote Signature		Remote Signature: In-Process	

If the consumer has not finished the process, the status will be **Remote Signature: In Process**. If the consumer has failed the DocuSign process, the status will be **Remote Signature: Failed**. When the consumer completes the process, the application will move to the Submitted tab.
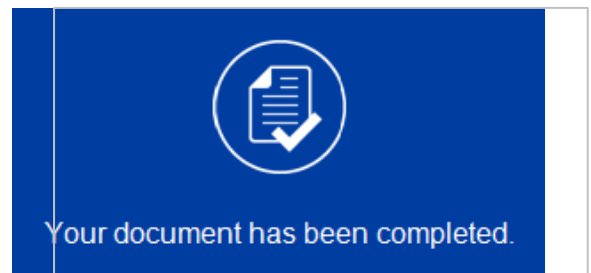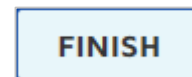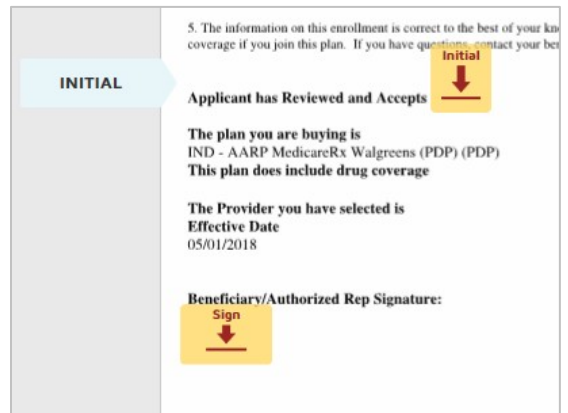
Step 4. Complete the Remote Signature process. It is recommended you be on the phone with the consumer to complete the DocuSign process. The consumer will click on the Review Document button. The consumer must then enter the Access Code that you previously created.

UnitedHealthcare®

UnitedHealthcare Medicare and Retirement Enrollment sent you a document to review and sign.

REVIEW DOCUMENT

Please enter the access code to view the document

UnitedHealthcare Medicare and Retirement Enrollment
eSignature Stage (Optum/UHG)

The sender has requested you enter a secret access code prior to reviewing the document. You should have received an access code in a separate communication. Please enter the code and validate it in order to proceed to viewing the document.

Access Code
[   ]   VALIDATE   I NEVER RECEIVED AN ACCESS CODE
Show Text

Step 5 **After entering the Access Code, the consumer will sign and initial the application.** A copy of the application will open for the consumer to review and there will be marks on the third page for initials and signature. The consumer may do their own signature or accept an auto-generated signature style. Once signed, the consumer must click [FINISH] and the application will be completed. You, the agent, will not sign the application.

Note: If the consumer **clicks I never received an access code**, the consumer will be instructed to follow up with you to restart the Remote Signature process.

INITIAL

5. The information on this enrollment is correct to the best of your kn... coverage if you join this plan. If you have questions, contact your be...

Initial ↓

Applicant has Reviewed and Accepts

The plan you are buying is
IND - AARP MedicareRx Walgreens (PDP) (PDP)
This plan does include drug coverage

The Provider you have selected is
Effective Date
05/01/2018

Beneficiary/Authorized Rep Signature:
Sign ↓

Step 6 **Once completed, you and the consumer will receive an email confirmation.** The application will show in **My Applications** as Submitted with the DocuSign signature date. When you click on the application, you will now see a **Completed Application Summary** and a **View Signature Document** option. If you select the **View Signature Document** button, it will display the DocuSign document and signature.

FINISH

Your document has been completed.