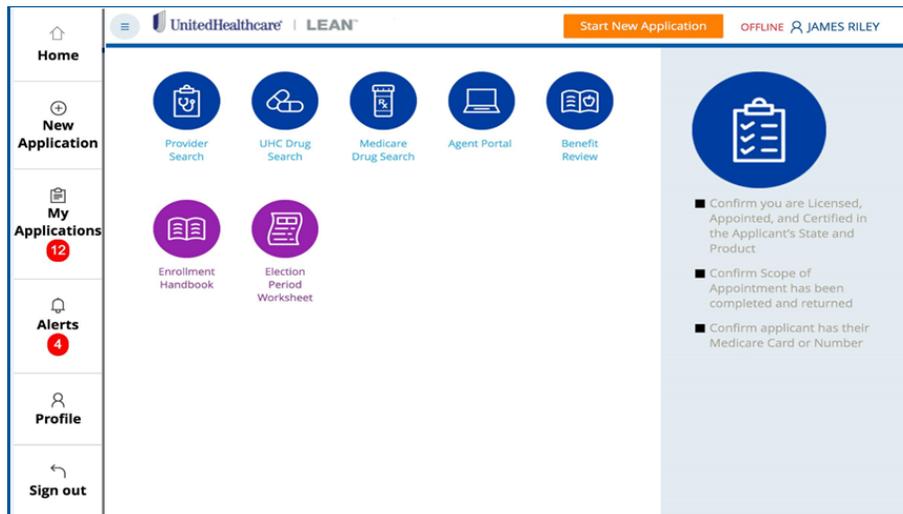


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How to Access LEAN



Mobile Devices

Download the LEAN Mobile App from the App Store or Google Play Store



Laptop or Desktop Computer

LEAN is compatible on the following browsers:



Google Chrome (Windows and Mac OX)



Safari (Mac OX)



Internet Explorer (IE11 32-bit and 64-bit)



Firefox (Windows and Mac OX)

For Desktop or Laptop: Windows 7, 8, XP Professional with SP2 (or higher)

Creating an Internet Connection From Your Cell Phone

If you're not in range of a Wi-Fi network, you can still access the Internet with an iPad®, Android tablet, or a computer by setting up a personal hotspot. A personal hotspot lets you share the cellular data connection of your smartphone (Wi-Fi + Cellular) with your mobile device.

For specific instructions on how to set up a hotspot from your mobile device, please refer to your cell phone carrier.

How to Sign Into LEAN



- Tap on the LEAN icon
- Tap in the **Username** field to access the keyboard. Enter your user name (**Writing ID**) and password that you use to access the UnitedHealthcare Distribution Portal (UDP). **NOTE:** Your username and password are case sensitive.



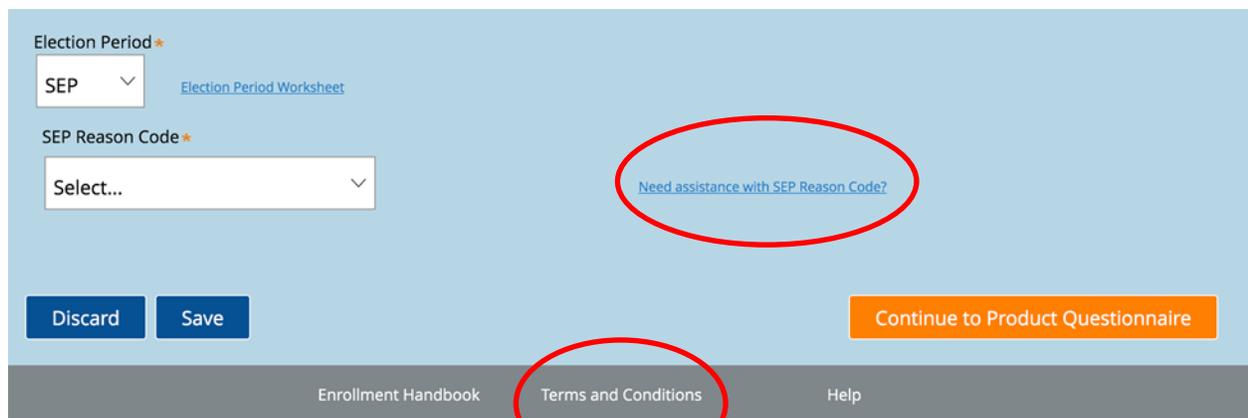
Choosing an Election Period

Why can't I see all the Election Periods?

When online, LEAN uses the information you entered in the **Gather Medicare Information** and **Applicant Information** sections to determine which election periods are applicable.

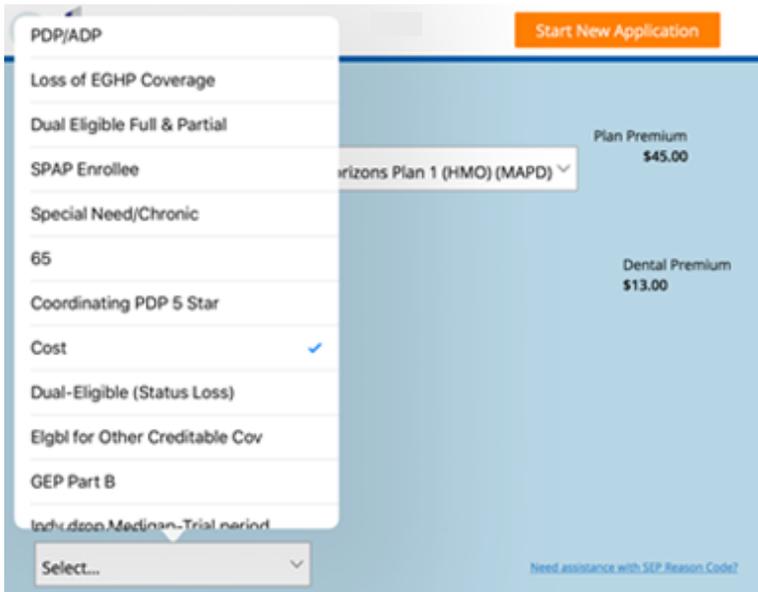
If you are using LEAN in its offline mode, all Election Periods will be displayed and you will need to determine the best option for the application.

If you have questions around the displayed Election Period, tap on **Need assistance with SEP Reason Code** or **Terms and Conditions**.



Select the SEP Reason Code from the drop-down list.

Note: The choices given may be reduced based on questions answered on the previous two screens.



NOTE: For questions about SEP Reason Codes, please refer to the **Need assistance with SEP Reason Code?** button on the right hand side to determine the appropriate value.

How to Look Up a Primary Care Physician (PCP)

1. Tap on **PCP Search** to look up a PCP or verify the PCP is in-network.



2. You can narrow your search for a specific PCP by using the Search bar at the top of the PCP Search screen.



NOTE: If you select a non-UnitedHealthcare branded product, such as Preferred Care Partners or Sierra, the provider search URL for those products will appear instead of the PCP Search button.

Nathaniel J Moore, MD

[More about this provider](#)

Compare with other providers

Add to List

Specialty: Family Practice

✓ Accepting New Patients ↕

[Denver Metro Proprietary](#) (PCPID: 0195462274)

3

Estimated Distance: 1.9 miles

14991 E Hampden Ave Ste 165

Aurora, CO 80014-3980

720-878-7055

[Map](#) | [1 Additional Location](#) | [Text Me](#)

- Once you have identified an available PCP, enter the **PCP ID** from the PCP Search into the PCP ID section.

3

PCP ID *
#

PCP Name *
Name

PCP Phone Number
000-000-0000

Current Patient of PCP? * Yes No

Signing the Application

- The **signature date** fields will populate with the current date.
- Sign in the Signature fields using a finger, stylus or mouse.
- Use the clear button to erase and try again as needed.
- Hit **Accept** once you are satisfied with your signature.

Applicant Signature

Clear

Applicant's Name: Bob Barker Medicare #: 111222333a Signature Date: 01/26/2016

Agent Signature

Clear

Agent Name: JAMES RILEY Writing ID: 2014037 Signature Date: 01/26/2016

Send Enrollment Receipt

If the applicant previously provided an email address, LEAN will display it in the email address field. If no email address was provided, you can enter a valid email address at this time.

Send Applicant an Enrollment Receipt
 Submit and Begin Shared Residence Application

Email Address

Submit and Begin Shared Residence Application

1. To submit and begin a shared residence application, switch the toggle switch and select the information from the first application to transfer to the new application.

Submit and Begin Shared Residence Application

Select All

<input checked="" type="checkbox"/> Last Name	<input checked="" type="checkbox"/> Primary Address
<input checked="" type="checkbox"/> Mailing Address	<input checked="" type="checkbox"/> Phone number
<input checked="" type="checkbox"/> Spoken Language/materials	<input checked="" type="checkbox"/> Authorized Representative
<input checked="" type="checkbox"/> Institution Question/Information	<input checked="" type="checkbox"/> Proposed Effective Date
<input checked="" type="checkbox"/> Plan Selected	<input checked="" type="checkbox"/> Riders
<input checked="" type="checkbox"/> Health Coverage	<input checked="" type="checkbox"/> Drug Coverage
<input checked="" type="checkbox"/> PCP information	<input checked="" type="checkbox"/> Premium Payment

2. Access the new application on the **My Applications** screen under the **Action Required** tab. NOTE: If Last Name was transferred, you can locate the new application using the last name. It will always be the "Not Complete" application listed first.
3. Open the application and complete the application.

- Open the application and complete the consumer information. The address and phone information will be duplicated from the last application.

1. Medicare 2. Applicant 3. Product/Plan 4. Questionnaire 5. PCP selection 6. Payment 7. Signature

MEDICARE HEALTH INSURANCE

FIRST NAME* MIDDLE NAME LAST NAME*

First name Middle name Last name

MEDICARE CLAIM NUMBER* SEX*

000000000A Select... v

IS ENTITLED TO EFFECTIVE DATE

HOSPITAL (PART A) -- v 01 v -- v

MEDICAL (PART B) -- v 01 v -- v

Discard Save Continue to Applicant Information

View Applications

To view your applications, tap on **My Applications** tab from the left hand navigation menu on the home page.



Applications are displayed by status and date **submitted**.

To view a submitted application, tap **My Applications** and select **Submitted**.

To view an application, choose **View App**.

Action Required **Submitted**

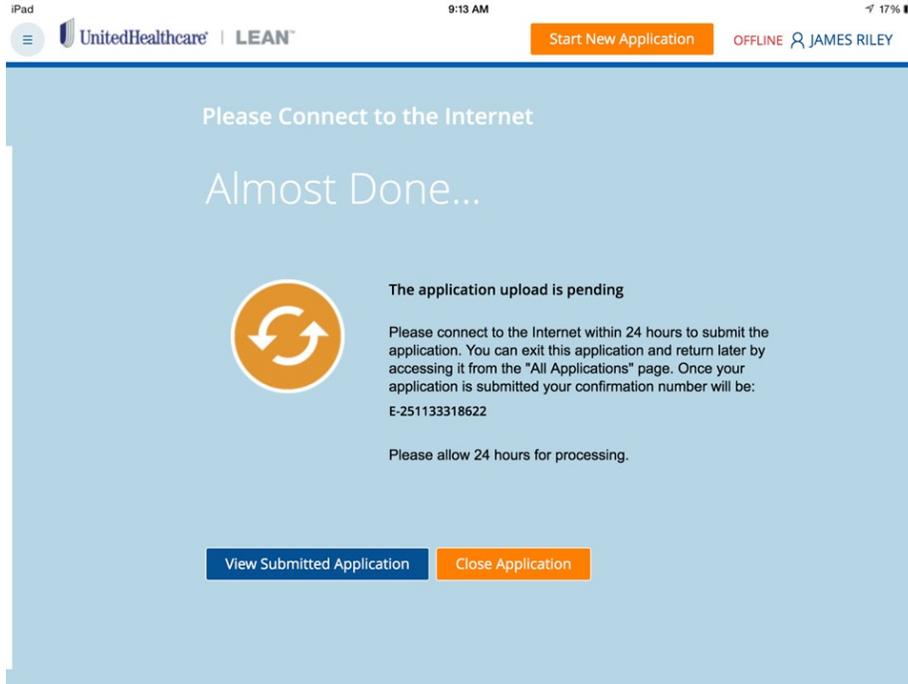
1 2 >

Conf#	First Name	Last Name	Signed Date	Status	Date Submitted
1 E-249634876278	Pierce	test99	2/8/2016	Submitted	2/8/2016
DOB	04/04/1907	Medicare ID	555666789F	Effective Date	03/01/2016

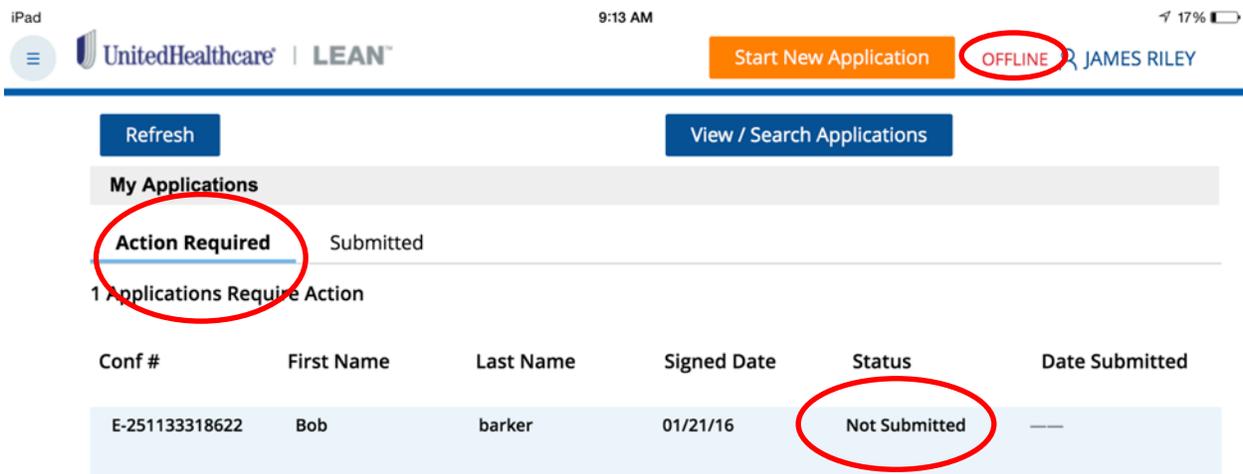
View App Send Receipt

Submitting Applications Taken Offline

After completing an enrollment application offline, you will need to continue with the following steps in order to submit the application for processing.



1. When you submit your LEAN application offline, the application will appear in the Action Required tab of My Applications. The status is **Not Submitted**.



- Connect to the internet. Once the indicator changes to **Online** in the top right hand corner of the screen, you are ready to refresh the page and watch the submission occur.

The screenshot shows the top of the app interface. At the top, it says 'iPad' with a Wi-Fi icon, '9:14 AM', and '17%' battery. The UnitedHealthcare | LEAN logo is on the left. In the center is an orange 'Start New Application' button. On the right, the word 'ONLINE' is circled in red, followed by a user icon and the name 'JAMES RILEY'. Below this is a navigation bar with 'Refresh' and 'View / Search Applications' buttons. The main content area is titled 'My Applications' and has two tabs: 'Action Required' (selected) and 'Submitted'. Below the tabs, it says '1 Applications Require Action'. A table lists one application:

Conf #	First Name	Last Name	Signed Date	Status	Date Submitted
E-251133318622	Bob	barker	01/21/16	Not Submitted	---

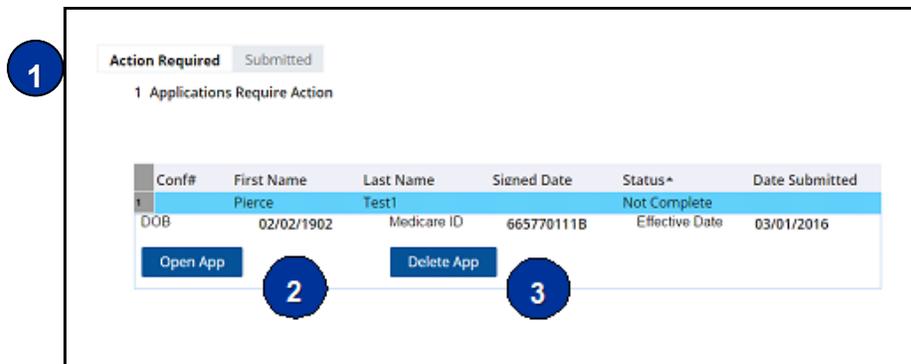
- After tapping the refresh button, you should navigate to the **Submitted** tab and find the last application submitted at the top of the list. Notice the status is now **Submitted**.

The screenshot shows the app interface after a refresh. The 'ONLINE' status is now in blue. The 'Submitted' tab is selected. The table now shows three applications:

Conf #	First Name	Last Name	Signed Date	Status	Date Submitted
E-251133318622	Bob	barker	01/21/16	Submitted	01/21/16 09:13 am
E-251133318185	Kelsie	grygelko	01/21/16	Submitted	01/21/16 09:08 am
E-251133276325	Kelsie	grygelko	01/20/16	Submitted	01/20/16 09:29 pm

Incomplete Applications

1. To open and finish an incomplete application, tap on the **Action Required** tab.
2. Tap on **Open App**. To delete an incomplete application, click on **Delete App**.

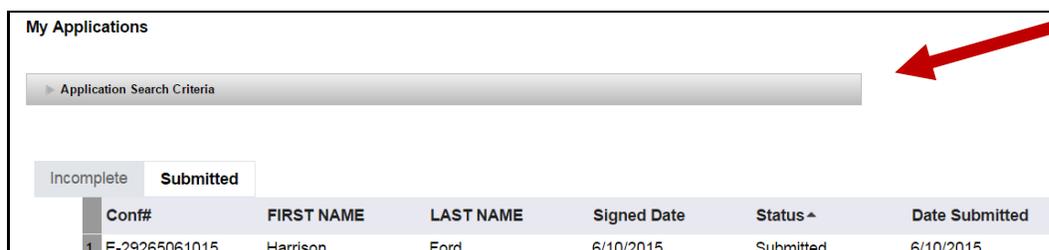


Searching for an Application

1. Tap the **View/Search Applications** button on the Home Page.



2. Search for Submitted and Incomplete applications using **Application Search Criteria**.



My Applications

▼ Application Search Criteria

Medicare # Writing ID 340000

Applicant's First Name Applicant's Last Name

Signature Date - From To

Effective Date - From To

Confirmation Number Date Of Birth

The oldest possible search date is two years prior to today. Only applications taken through the EMS system will appear in your search results.

Search All Applications

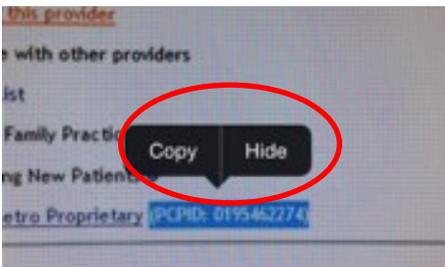
The length of time applications are visible and maintained on the Agent Dashboard depends on the status of the application.

- Incomplete applications are deleted 24 hours after application is saved.
- **In order to protect members' protected health information, there is no print option in LEAN. All of your applications taken in LEAN are available to view in the My Applications section of the URL and remain there for 10 years.**

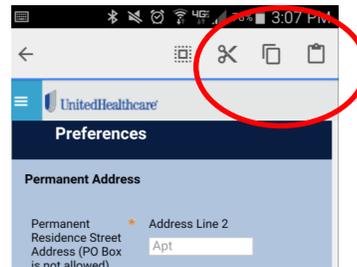


- You can copy and paste text on your mobile device by tapping and holding the word you want to copy. Select Copy, then navigate to where you want to insert the text and tap and hold to paste. Select paste. This is helpful when you need to enter the **PCP ID Number**.

iPad®



Android



- Check your Agent Profile on the LEAN Home page. If you need to make changes to your Agent Profile, make those changes in UDP.
- Note: To check the status of your submitted application, check United Distribution Portal (UDP) Applications & Enrollments > Applicant Search.

If you have questions not answered in this guide, please contact the Producer Help Desk (PHD):

phd@uhc.com
 1-888-381-8581
 Option 5