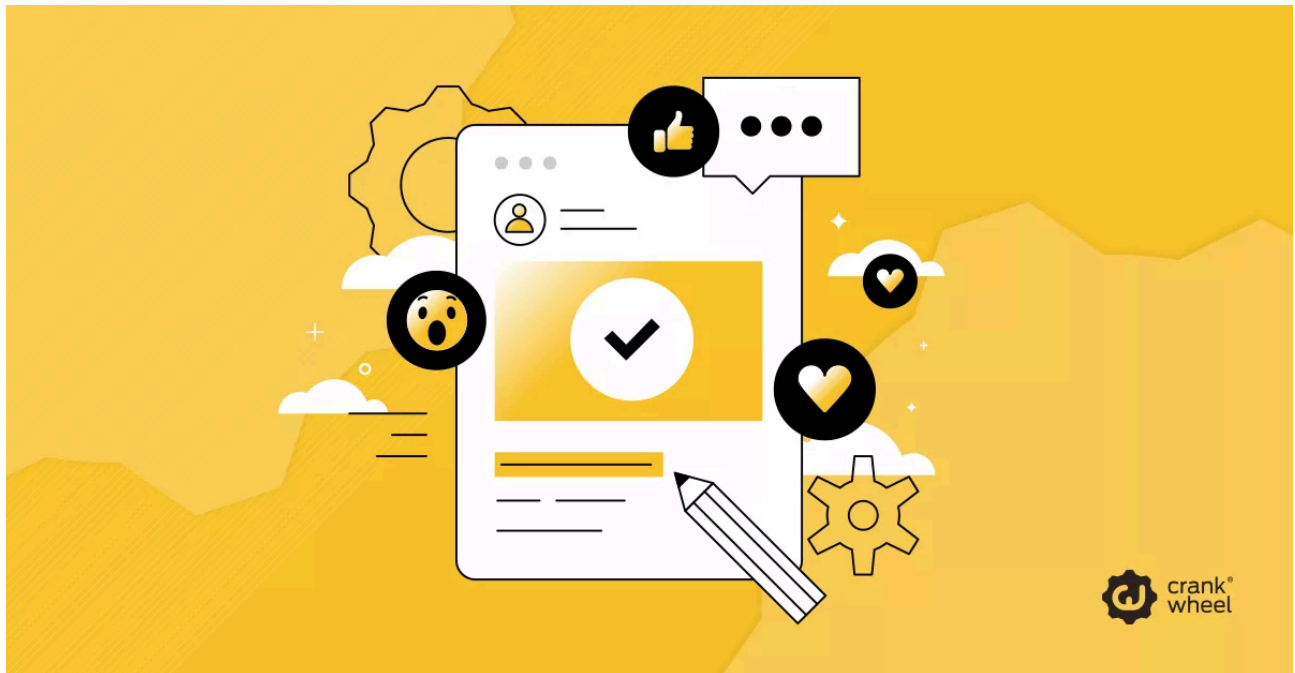


Collect Client Signatures for ACA and Medicare SOA Forms with CrankWheel

By Jói Sigurdsson / CrankWheel



The CMS has made some parts of helping clients with their health insurance quite difficult for both agents/brokers and their clients. There are good reasons for this, but have you ever wished you had some tools to help make the process as easy as possible?

It is now possible to have your client review and e-sign either an ACA Marketplace consent or attestation form, or a Medicare SOA (Scope of Appointment) form, while they are on the phone with you, as part of a screen sharing session that you can launch to their mobile phone by sending a simple text message. The forms are fully compliant with the latest CMS regulations.

This lets you show your face, show your license, and review plan options easily, and when it comes time to fill in and sign a form, this launches on their mobile screen just like the screen share did. It's as easy as sending them a text message with a link, they click it and start viewing your screen, and their phone number has been verified for the e-signature at the same time.

Screen Sharing: The Key to Efficient Client Signatures

Thousands of insurance agents and brokers have adopted CrankWheel to change their sales calls into virtual consultations. No download or registration is required for your clients; it's an easy enough process for them that while you're on the call, you can send them a text message and tell them "please click the link I just sent to your phone - I just want to show you something". No need to explain that your call will now transform into a full web conference so that you can provide a smoother presentation. They simply click the link and are immediately viewing your screen, a document and/or your webcam.

Whether you need to walk a client through a health plan application or present visual information that supports decision-making, CrankWheel ensures you're always able to conduct seamless presentations. Plus, the interface includes tracking tools to ensure agents can monitor interaction, making it easier to direct attention and engagement.

When the time comes to launch a form, that's just a couple of clicks on your end and the form opens right there on their phone screen, and you can follow along and prompt them through filling it out and e-signing it.

ACA and Medicare Compliance: Forms at Your Fingertips

On October 27, 2024, CrankWheel launched its updated features, designed to simplify the ACA Marketplace consent process and introduce a Medicare Scope of Appointment (SOA) form.

ACA Consent Forms and Client Attestation

CrankWheel's ACA-related tools include the ability to collect two important types of documentation:

- 1. Enrollment Consent Form**

Agents and brokers can capture consent from their clients for ACA Marketplace enrollment quickly and securely. The process starts when the agent launches a CrankWheel session and sends the consent form to the client's mobile device. Using phone number validation, the client is prompted to review and sign the form electronically.

- 2. Attestation Form**

Agents can present an attestation form to document that the client was shown the relevant information and that they have reviewed and confirmed its accuracy. The client verifies and signs that the information they provided is correct, and both the agent and the client receive a PDF with the signed form—fully compliant with ACA and CMS regulations.

How it Works:

- Sign into your CrankWheel account, and just one time, you need to go to your user options and opt into insurance forms and provide your NPN number and other details.
- Any time after that, simply start a screen sharing session while you're on the call with your client.
- Share your screen to the client's mobile device by sending them a link in a text message via CrankWheel.
- Launch the necessary ACA consent or attestation forms, or a Medicare SOA form.
- Let the client input their details, guide them as needed, and validate their input.
- The client then electronically signs and submits the form, receiving a PDF copy via email while you get the same in your own inbox.

All signatures are verified via phone number, and the IP address of the client is captured for compliance purposes. The ACA forms are also available in Spanish, allowing agents to easily engage a wider range of clients.

If you'd like to watch a video of the ACA e-signature process, check out this [recording from a recent webinar](#) showcasing the feature.

Medicare Scope of Appointment (SOA) Form

The Medicare SOA form follows a similar workflow to ACA forms, ensuring that agents can conveniently complete this critical step with clients on a single call—whether they're using their phone or laptop. You'll begin by launching a CrankWheel screen-sharing session, fill in the key details (like the appointment date), and sign the form before sharing it with your client for their completion and signature.

The entire process takes only a few minutes and provides both the agent and the client with secure confirmation of compliance. All documents are emailed to both you and your client, and CrankWheel maintains the e-signature audit trail for a minimum of 10 years as required by CMS.

Frequently Asked Questions:

1. Does the signature pick up the client's IP address?

Yes, along with a phone number verification to ensure the signed form's authenticity and compliance.

2. Are the forms available in Spanish?

The ACA consent and attestation forms are available in Spanish to support non-English speakers.

3. Does my client need to sign on their phone?

Yes, for both ACA and Medicare forms, the process requires signing via a mobile device. You'll send a text link to their phone where they will verify and sign the documents securely.

4. Can they switch between devices during the session?

Yes, after completing forms via mobile, clients can join from a desktop. This helps them continue viewing shared content beyond the signature process.

Helping You Serve your Clients More Easily

CrankWheel's streamlined interface reduces friction for agents collecting forms from insurance clients, and also lets you share visual information as needed on sales calls, to make it more likely you can close the sale.

These tools offer a competitive edge, ensuring insurance agents meet their compliance needs while delivering superior service to their clients. CrankWheel remains a key part of the sales process by providing effective, no-hassle screen sharing and form signing capabilities.

If you'd like to try CrankWheel for yourself, we are offering a special extended free trial for California Broker Magazine readers. It's 30 days completely for free, no obligation, no credit card required, and your special sign-up page is at <https://crankwheel.com/calbrokermag>

Get 30 Days of Unlimited Usage

We love insurance professionals and to help you get started and ensure you are successful with our tool, we offer free training sessions twice or more per week, and world class support. Sign up and you will get all the details.

About the Author

Jói Sigurdsson is the founder and CEO of CrankWheel, a software company providing a screen sharing solution designed for insurance sales. Before founding CrankWheel 10 years ago, Jói spent 10 years at Google and another 10 before that building various early-stage technology startups. Outside of work, Jói enjoys skiing, hiking, power lifting and spending quality time with his wife and 6 children.

