



**ASCEND USER TRAINING FOR  
CENTENE & WELLCARE**



**WHAT IS ASCEND?**

# Ascend Is



A secure, encrypted, real-time cloud-enabled data platform that brings together all necessary tools for field sales agents to have meaningful engagements with prospective members. It is also a modular system with many functions designed to assist field sales teams with:

- Electronic Scope of Appointment
- Electronic application completion and submission
- Audio recording capabilities
- Point of Sale video capabilities
- Replacement for paper sales support and marketing documents
- Instant messaging from management to individual field agents and/or groups of agents



# Ascend Platform Overview

- Specifically engineered for the insurance industry
- Currently used by over 40,000 agents including national, regional and local carriers
- Available for iOS and Windows platforms
- Maximizes field sales/beneficiary interaction and on-boarding of prospective members
- Captures important prospective/new member information and allows for immediate action upon new member enrollment



**WHAT ASCEND WILL DO FOR YOU**



- **Protect Your Business: Drastically reduces the potential for complaints to Medicare**
  - Research has shown that sales presentations and enrollments done through Ascend have a 0.03% Complaint Rate compared to the much higher rate for paper sales presentations and enrollments
  - Ascend also provides the ability to record your sales presentation to the beneficiary
- **Decrease Administrative Work**
  - Ascend's ability to auto-fill applications from a lead will provide less typing for the agent reducing clerical errors
  - Required data fields cannot be missed and provide less likelihood that the application will pend during processing



- **Help you keep the sales you have worked hard for**
  - Since Ascend submitted enrollments are received on the same day they're submitted, the applications are processed much faster which means your clients will receive their Welcome Letters quicker
- **Keep you connected with the field and compliant through one simple application**
  - We provide easy access to resources like sales presentations and videos, direct links to plan information, the Broker Portal, and more, all in one place to keep you organized and make compliance adherence simple
- **Help agents create a clean, smooth and professional presentation**
  - Paperless selling is cleaner, smoother, more compliant, and easier for the beneficiary to understand



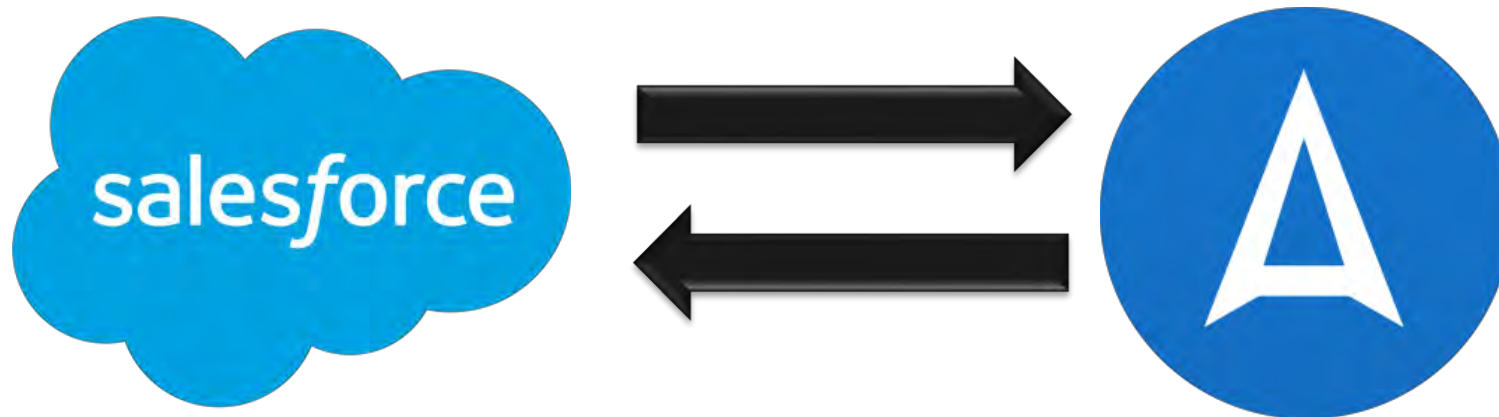
**ASCEND & SALESFORCE**



# Salesforce Integration



- Salesforce and Ascend communicate to send updates back and forth





**GETTING FAMILIAR WITH ASCEND**



# The Three Components of Ascend

ARM: Ascend Real-Time Manager



AMA: Ascend Mobile Application

AQE: Ascend Quote & Enrollment



# ARM: Ascend Real-Time Manager

- The web-based platform where you can:
  - Download the Ascend Mobile Application (AMA)
  - Manage your Book of Business in one view (access on iPad or PC)
  - Location where recordings get uploaded from AMA
  - Long term data storage for leads and recordings
  - Use as a resource for managers to extract reporting on their teams

**Ascend**

Agent Connect Ascend Meetings Map

Email

Password

[Forgot Password?](#)

# AMA: Ascend Mobile Application



- The sales and enrollment platform housed on your iPad or Windows device
- Where you will conduct and record your sales meetings
- Where you manage your Book of Business and track your lead/prospect information
- Where you will submit your electronic enrollments using AQE



# AQE: Ascend Quote & Enrollment



- Tool in Ascend that gives you the ability to compare plan info and choose the best plan for your prospect
- Where you create your member profile with provider info, formulary and pharmacy choices
- Where the online enrollment application is housed

**2020 Medicare Plans** List Compare

Below are the plans that are available in ZIP Code **90015** in Los Angeles County, California:

ZIP Code:  Update

**WellCare Freedom (HMO D-SNP)** \$0<sup>00</sup>/month

Plan Covers	In-Network Copay
<span>✗</span> Dental	Primary Care Physician: \$0.00
<span>✓</span> Vision	Emergency Room: \$120.00
<span>✓</span> Hearing	Specialist: \$0.00
<span>✓</span> Rx	Maximum Out-of-Pocket: \$2,500 Annual In-Network.

Apply Now View Details

**WellCare**  
Beyond Healthcare. A Better You.



## What Top Agents Say About Ascend

*“Overall it saved me so much time and I only had to go to the office once a month and was mostly in the field. Before Ascend I was going into the office every day. Sometimes Ascend saved me up to two hours a day.”*

*“Ascend added to my professional appearance and allowed me to complete my enrollments in a very short period of time as opposed to a paper application.”*

*“I have less to carry around, it makes my life much easier. I have much less to worry about compared to when I used paper applications. I used it for all but one application this AEP.”*

*“Using Ascend has made me 20% more productive.”*

*“Overall, it made me more successful as an agent.”*



**ASCEND REAL-TIME MANAGER**



# Logging Into ARM – <https://arm.ascendproject.com>



https://arm.ascendproject.com/



Agent Connect

Ascend Meetings Map

Open your browser and enter this URL.

Enter your email and password (set up by your manager)

Email

Password

[Forgot Password?](#)

[Login](#)

Then click here to sign in.

Forgot your password? Tap here to get new one.

# Downloading AMA



The screenshot shows the Ascend user interface. At the top left is the Ascend logo. To its right, the 'Entity' is set to 'Centene Corporate' and the user is 'M. Bettegnies (Agent)'. A navigation bar contains three tabs: 'Download' (highlighted in dark blue), 'Meetings', and 'Leads'. Below the navigation bar, the 'Download' section is active, displaying a 'Welcome to Ascend' message and three application options:

- Ascend iOS**: Includes an 'INSTALL APP' button. A callout box points to this button with the text: 'Tap here to install on an iPad.' Below the title, it shows 'Version 2020.1.02.19' and 'Released: 3/31/2020'.
- Ascend Windows**: Includes an 'INSTALL APP' button. A callout box points to this button with the text: 'Click here to install on a Windows device.' Below the title, it shows 'Version 2020.2.05.01' and 'Released: 5/6/2020'.
- Mobile Application User Manual**: Includes a 'VIEW' button.

A callout box also points to the 'Download' tab in the navigation bar with the text: 'First, select the Download tab.'



**IOS ONLY INSTRUCTIONS**

# 1. Launch the Ascend App



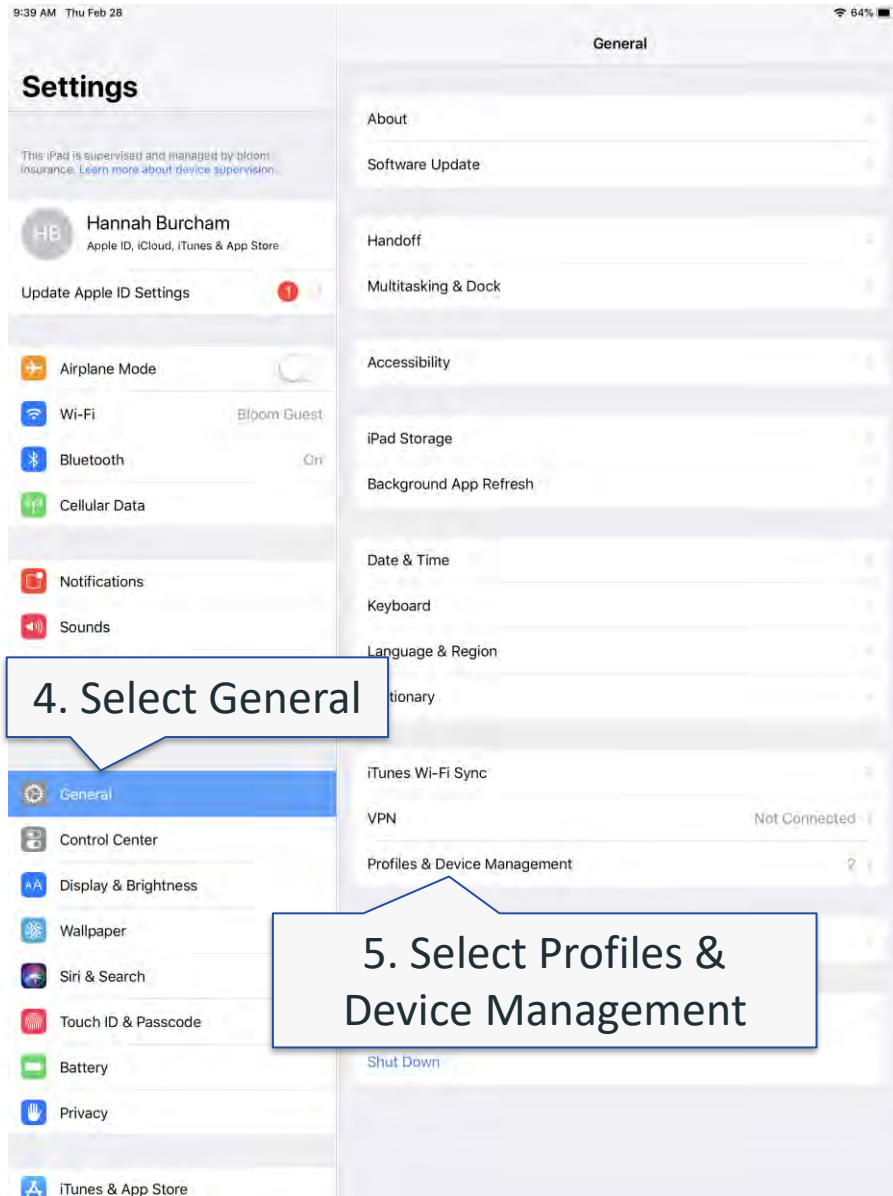
## Untrusted Enterprise Developer

"iPhone Distribution: Bloom Insurance Agency, LLC" has not been trusted on this iPad. Until this developer has been trusted, their enterprise apps will not be available for use.

Cancel

# 2. Click Cancel

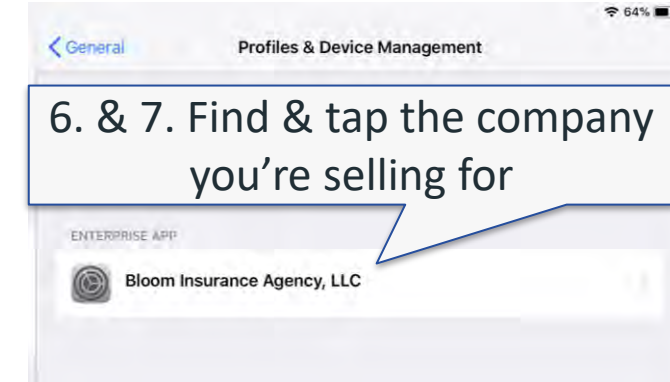
# 3. Open Settings



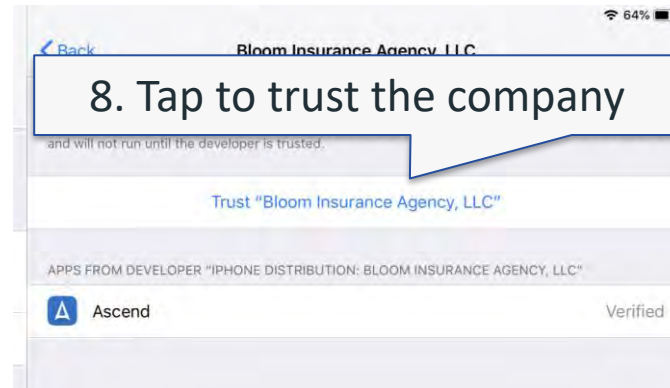
# 4. Select General

# 5. Select Profiles & Device Management

# 6. & 7. Find & tap the company you're selling for



# 8. Tap to trust the company



## Trust "iPhone Distribution: Bloom Insurance Agency, LLC" Apps on This iPad

Trusting will allow any app from this enterprise developer to be used on your iPad and may allow access to your data.

Cancel

Trust

# 9. Verify that you trust them



# 10. Launch the Ascend App and start using AMA



# **ASCEND MOBILE APPLICATION**



## **LOGIN & NAVIGATION**

# Login Screen



The screenshot shows the Ascend login interface. At the top center is the Ascend logo (a white 'A' in a blue circle) with the word "Ascend" below it. Below the logo are two input fields: "Email" and "Password". A blue "Sign In" button is positioned below the password field. Underneath the button are three toggle switches: "Remember Email", "Use Touch ID", and "Sandbox Mode". Below the toggles are two links: "Forgot Password?" and "Help". At the bottom of the screen, the text "Version: 2020.1.03.02" is displayed. Six callout boxes with blue borders and white text point to specific elements: "Manual Sign In" points to the top of the login form; "Touch ID Sign In" points to the "Use Touch ID" toggle; "Tap here to contact the Helpdesk" points to the "Help" link; "Tap here to enter Sandbox (test) mode" points to the "Sandbox Mode" toggle; "Tap here to get a new Password" points to the "Forgot Password?" link; and "Version Information" points to the version number at the bottom.



# Home Screen



**Ascend**

**Madison Bettegnies**  
Unavailable Accepting Calls

**Welcome Madison**

**What would you like to do today?**

- Agent Portal
- Summary of Benefits
- Medicare.Gov
- Summary of Benefits - DSNP
- Sales Video - English
- Sales Video - Spanish

**New Leads**

Name	Date Modified	Source	Status	County	Zip Code
You have no new leads. Any new leads will appear here.					

[View All Leads](#)

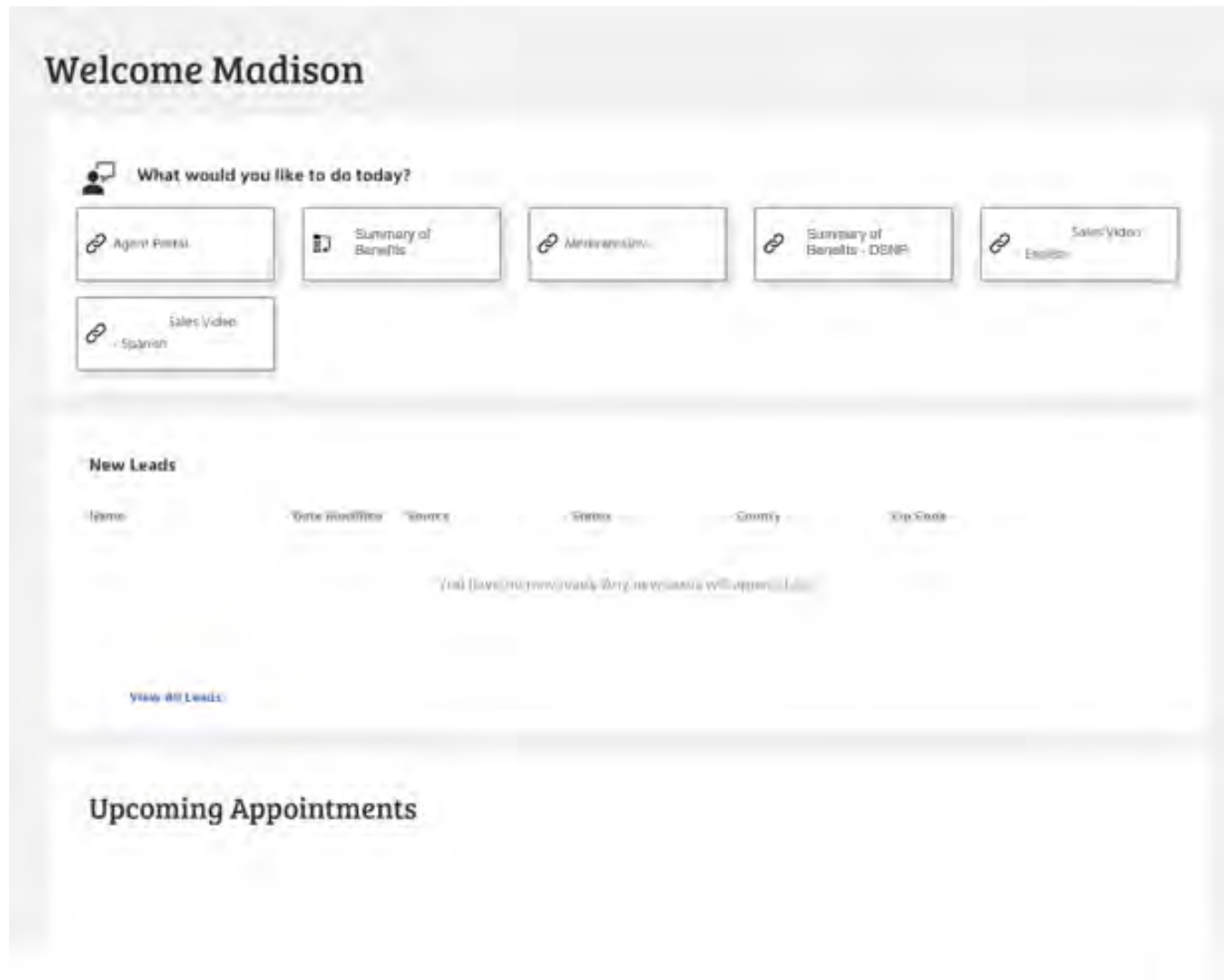
**Upcoming Appointments**

Your name should appear here

And here

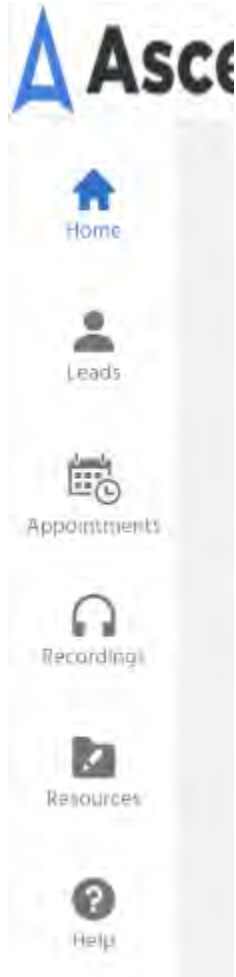


# Main Window



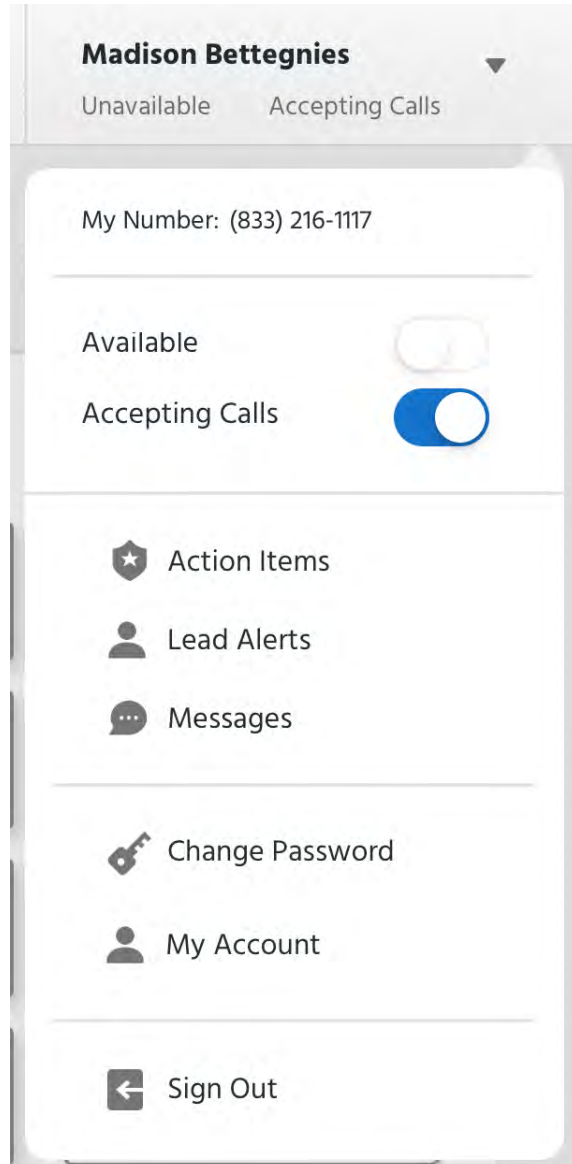
- This makes up the majority of the AMA screen and is what will change when different options are selected from the **Navigation Bar** or **Drop-Down Menu**

# Navigation Bar



- The Navigation Bar will be visible from all sections of AMA
  - It consists of:
    - Home Page/ Welcome Page
    - Leads – Your Book of Business
    - Appointments – View Seminars and Home Visits assigned to you
    - Recordings – View and upload recordings
    - Resources – Available during applications
    - Help

# Drop-down Menu for iPad



- My Number – RATE Number
- Accepting Calls – Toggles availability to receive RATE calls
- Action Items/Lead Alerts – Navigates user to the Notifications page
- Messages – View any messages past or present
- Change Password
- My Account
- Sign Out

# Drop-down Menu for Windows



Madison Bettegnies

Unavailable Not Accepting Calls ▲

My Number: +18334070016

Available  No

Accepting Calls  No

Default Browser  No

Connection Status: Connected

Offline Mode  No

Action Items

Lead Alerts 1

Messages

Change Password

My Account

Sign Out

- My Number – RATE Number
- Accepting Calls – Toggles availability to receive RATE calls
- Default Browser – Opens enrollment form in Chrome, IE, etc.
- Offline Mode – Shows user if they are connected to Internet
- Action Items/Lead Alerts – Navigates user to the Notifications page
- Messages – View any messages past or present
- Change Password
- My Account
- Sign Out

# My Account



- Edit personal account information easily on AMA

Ascend

Madison Bettegnies  
Uninitialized | Accepting Calls

Home

Leads

Agent Portal

Agent Portal

Agent Portal

Agent Portal

Agent Portal

Broker Portal

What's New

2019 Allwell Presentation

Agent Portal - CA

Agent Portal - KS

Agent Portal - OH

Agent Portal - WI

### Welcome Madison

#### My Account: maddybett@hotmail.com

First Name: Madison | Last Name: Bettegnies

Phone: 812-320-1832 | Mobile: 000-000-0000

Office: 000-000-0000 | Home: 000-000-0000

Fax: 000-000-0000

Address: Business

City: City

State: | ZIP Code:

Save | Cancel

New Leads

Name	Date Modified	Source	Status	County	Zip Code
You have no new leads. Any new leads will appear here.					



**HOME**



# Home Screen



## Ascend

Madison Bettegnes

Unavailable Accepting Calls

### Welcome Madison

**New Action Items!**  
View Notifications

You have a new lead assigned to you!

You have a new Home Visit assigned to you!

Notifications

Resource Quick Links

What would you like to do today?

2020 RATE Telephonic Enrollment Script - English	Agent Portal - AR	Agent Portal - CA	Agent Portal - FL	Agent Portal - GA
Agent Portal - IL	Agent Portal - IN	Agent Portal - KS	Agent Portal - LA	Agent Portal - MD
Agent Portal - MS	Agent Portal - NM	Agent Portal - OH	Agent Portal - OR	Agent Portal - PA
Agent Portal - SC	Agent Portal - TX	Agent Portal - WI	Broker Portal	Arizona Quick Quote
Ascension Florida Quick Quote	Ascension Kansas Quick Quote	Blue Button Demo	California Quick Quote	Florida Quick Quote

# New Action Item



A number here shows how many action items you must view

This icon means there is a new message you must read and acknowledge

The screenshot shows the Ascend user interface. At the top left is the Ascend logo. The main heading is 'Welcome Madison'. Below this, there is a notification box with a red triangle icon and the text 'New Action Items!' and a link 'View Notifications'. Below the notification are two other messages: 'You have a new lead assigned to you!' and 'You have a new Home Visit assigned to you!'. On the right side, there is a user profile for 'Madison Bettegnies' with a status of 'Unavailable' and 'Accepting Calls'. A dropdown menu is open, showing options: 'Action Items' (with a blue circle containing the number 1), 'Lead Alerts', 'Messages', 'Change Password', 'My Account', and 'Sign Out'. A blue circle with the number 1 is also visible next to the user's name.

Click here to view the notification

You can also view action items from the dropdown list



# Acknowledging the Message



Click anywhere on the message to open it

Test

Posted By: Madison Bettegries | May 26, 2020

This is a test message. Thank

This is a test message. Thanks!

Acknowledge Message

Close

Select "Acknowledge Message" to mark that you have read it

Notifications

Test

Posted By: Madison Bettegries | May 26, 2020

This is a test message. Thank

This is a test message. Thanks!

Acknowledged

Close

Once you have acknowledged the message, it will say "Acknowledged"

**Important Note:** you cannot start a new meeting if you still have messages to acknowledge



**LEADS**



# Leads Screen



Madison Bettegnies

Unavailable Accepting Calls

- Home
- Leads
- Appointments
- Recordings
- Resources
- Help

## Leads

### New Leads

Name	Date Modified	Source	Status	County	Zip Code
Doe, Jane	May 26, 2020	-	-	Monroe	47403

### All Leads

Search Leads Here

Filter Leads

Add a Lead

Doe, Jane	May 26, 2020	-	-	Monroe	47403
Jo, Harper	May 12, 2020	Self Generated	-	Los Angeles	90015
test, crosby	Nov 13, 2019	Self Generated	-	Los Angeles	90015
test, harper	Mar 26, 2020	Self Generated	-	Los Angeles	90015
Test, Sam	Dec 06, 2019	Self Generated	-		72904
Test, John	Sep 19, 2019	Self Generated	-		47403
Test, Test	Nov 13, 2019	Self Generated	-		75390
Test, Harper	Apr 27, 2020	Self Generated	-		47403

# Add a Lead



You can enter all lead data here, or scan their driver's license to capture info quickly

**New Lead** Scan Drivers License

**First Name**  **Last Name**

**Birthday**

**Gender**  Male  Female

**Phone**

**Email**

**Permission to Contact**

**Status**  **Source**

**Address**

**City & County**

**State & Zip**

Doe, Jane				
Jo, Harper				
test, crosby				
test, harper				
Test, Sam				
Test, John	Sep 19, 2019	Self Generated	-	47403
Test, Test	Nov 13, 2019	Self Generated	-	75390
Test, Harper	Apr 27, 2020	Self Generated	-	47403

# Scan License to Collect Lead Info



Line up grid to point to back of the license and tap the iPad. This will import data, not take a picture.

# Finish Collecting Lead Info



The screenshot shows a form for adding a new lead. The form includes the following fields:

- Email:** Text input field.
- Permission to Contact:** Dropdown menu with "Select" option.
- Status:** Dropdown menu with "Select" option.
- Source:** Dropdown menu with "Self Generated" selected.
- Address:** Text input field labeled "Address Line 1".
- City & County:** Two text input fields labeled "City" and "County".
- State & Zip:** A dropdown menu labeled "State" and a text input field labeled "Zip Code".
- Claim Number:** Text input field labeled "Claim #".
- Hospital Coverage:** Text input field with a date format "MM/DD/YYYY".
- Medical Coverage:** Text input field with a date format "MM/DD/YYYY".

At the bottom of the form are two buttons: "Save" (blue) and "Cancel".

Two callout boxes provide instructions:

- A callout box on the left points to the "Save" button and contains the text: "Click 'Save' to add the new lead".
- A callout box on the right points to a camera icon next to the "Claim Number" field and contains the text: "Tap here to capture scan info from Medicare card, or enter it manually in the boxes".



# Lead Info



**Ascend**

Madison Bettegnies  
Unavailable - Accepting Calls

**Doe, Jane** **May 26, 2020**

Home Leads Appointments Recordings Help

Contact Lead Start a Meeting

Meeting Type	Date	Time
Home Visit	May 26, 2020	01:00 PM

Create a Scope of Appointment | Create Home Visit

Date	Time	Held By	Status
No Meetings on record for this Lead. Any held meetings with this lead will show here.			

Offline Enrollments

Meeting time	Status	ID
No Offline Enrollments pending for this Lead. Any Offline Enrollments created through Ascend for this lead will show here.		

Click here to edit a lead

Click here to contact a lead

Or click here to start a meeting

Click here to create a Scope of Appointment or Home Visit

Past meetings held will be viewable here

Meetings are defined as your interactions with prospects while using Ascend. You can view upcoming and past meetings in this section.

Notes

Note

Lead was assigned to Madison Bettegnies.

Date

May 16, 2020 02:22:50 PM

Click here to add a new Note to your lead

New Note

This section provides you with personal information about the lead

Information

Birthdate

Gender

Female

Phone

(999) 999-9999

Email

Address

1331 S Curry Pike

Driver License

Permission to Contact

Edit

Click on the lead to link the two leads together

Medicare Details

Claim Number

Hospital Coverage

Medical Coverage

Edit

Related Leads

Harper Jo

May 12, 2020

Self Gen

Unlink Lead

Select a lead to relate:

Name	Date Modified	Source
crosby test		
harper test		
Sam Test		
John Test		
Test Test		

Cancel

Add Related Lead

Add a related lead to fill out multiple applications simultaneously



# Edit a Lead



You can edit the lead's info from this screen, as well as update their status

**Information**

**First** Jane **Last** Doe

**Birthday** select Day Year

**Gender** Male Female

**Phone** 9999999999

**Email** Invalid

**Permission to Contact** Source

**Status** Follow **Source** Direct

**Address** 1331 S Curry Pike

**City & County** Bloomington Monroe

**State & Zip** IN 47403

Save Cancel

# *Electronic Scope of Appointment*

- Scope details are auto-filled from the lead data entry by the agent
- The scope can be emailed or texted to the beneficiary from Ascend
- The prospect confirms the appointment digitally
- Confirmation of the eSOA is seen in Ascend by the agent immediately
- Scope info is stored in the Ascend Real-time Manager and can be retrieved with ease by administrators



# Creating an eSOA



**Ascend** Madison Bettegnies  
Unavailable Accepting Calls

Home Doe, Jane  
May 26, 2020

Contact Lead Start a Meeting

Leads

Appointments

Meeting Type	Date	Time
Visit	May 26, 2020	01:00 PM

Recordings

Create a Scope of Appointment

Past Meetings

Date	Time
------	------

Resources

Help

Offline Enrollments

Meeting Time	Status	ID
--------------	--------	----

No Offline Enrollments pending for this Lead. Any Offline Enrollments created through Ascend for this lead will show here.

Click here to begin creating an eSOA

What kind of Scope of Appointment do you want to create?

Electronic Form

Paper Form

Close

Select a Scope of Appointment Form

Formulario de Confirmación del Alcance de una Cita de...

Scope of Appointment Form

A list will then populate. Select the eSOA form you would like to use from the list.

# Filling Out the eSOA



Select the products you plan to discuss

Then complete at least the required fields on the eSOA indicated by a \*

**Meeting Details**

To be completed by the agent prior to meeting with beneficiary

Agent First Name:\*  Agent Last Name:\*

Agent Phone:  Agent NPN:

Plan assigned agent ID:

Beneficiary  Beneficiary

Phone\*  Address

City  State

Zip Code  County

Initial Method of Contact (check one):

Sales Event

Walk-In

Inbound Call

**Note:** Lead information and agent information will auto populate. Go to Lead Details or My Account to change information

Scope of Appointment saved. Would you like to send it to the lead?

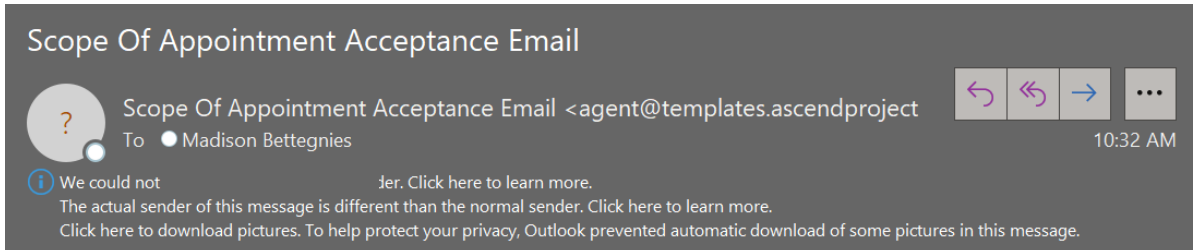
A box will populate prompting you to choose how you would like to send the invite. You can also select 'No' to only save the invite and not send it.

Click here to send the invite to the lead

# Prospect View



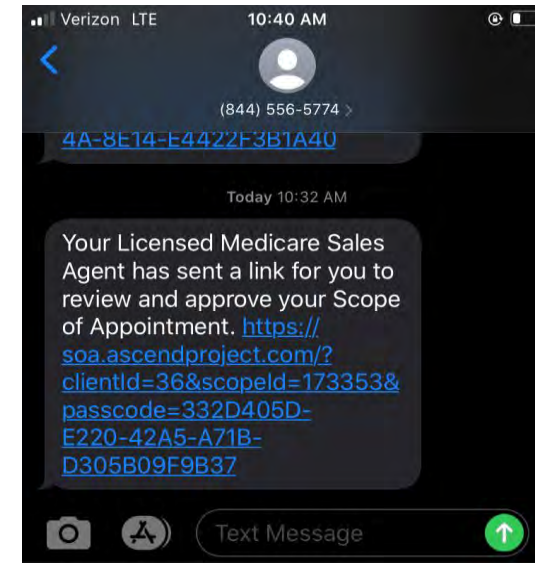
## Email



**WARNING:** This message originated from an external source, use caution when opening links or attachments!

[Click here to review your Scope of Appointment.](#) Please approve or reject the Scope of Appointment. It must be approved before you can discuss the specified health plans with the agent named in the form.

## Text





# Do you approve of this Scope of Appointment?

Document Title and Instructions

## Scope of Sales Appointment Confirmation Form

The Centers for Medicare and Medicaid Services requires agents to document the scope of a marketing appointment prior to any individual sales meeting to ensure understanding of what will be discussed between the agent and the Medicare beneficiary (or their authorized representative). All information provided on this form is confidential and should be completed by each person with Medicare or his/her authorized representative.

Products to Discuss

Each product(s) checked below will be discuss by an agent.

(Refer to the product type descriptions below for more details)

- Stand-alone Medicare Prescription Drug Plans (Part D):
- Medicare Advantage Plans (Part C) and Cost Plans:
- Dental/Vision/Hearing Products:
- Hospital Indemnity Products:
- Medicare Supplement (Medigap) Products:

Beneficiary Information	
First Name: John	Last Name: Prospect
Phone: 8123334567	Address:
City:	State:
Zip Code: 47401	County:

Agent Information	
Agent First Name: Chris	Agent Last Name: Jaffe
Agent Phone Number: 812-821-2121	Agent Email: cjaffe@bloominsuranceagency.com
Address: 2410 N Industrial	City: Bloomington
State: Indiana	Zip Code: 47403

Meeting Summary [Plan Use Only]	
Initial Method of Contact: (Indicate here if the beneficiary was a walk-in)	
Plan(s) the agent represented during this meeting:	
Agent, if the form was signed by the beneficiary at time of appointment, provide explanation why SOA was not documented prior to meeting:	
Agent Signature: Chris Jaffe	

**Product and Plan Descriptions**

**Stand-alone Medicare Prescription Drug Plans (Part D)**

**Medicare Health Maintenance Organization (HMO)**  
A Medicare Advantage Plan that provides all Original Medicare Part A and Part B health coverage and sometimes covers Part D prescription drug coverage. In most HMOs, you can only get your care from doctors or hospitals in the plan's network (except in emergencies).

**Medicare Advantage Plans (Part C) and Cost Plans**

**Medicare Health Maintenance Organization (HMO):**  
A Medicare Advantage Plan that provides all Original Medicare Part A and Part B health coverage and sometimes covers Part D prescription drug coverage. In most HMOs, you can only get your care from doctors or hospitals in the plan's network (except in emergencies).

**Medicare Preferred Provider Organization (PPO) Plan:**  
A Medicare Advantage Plan that provides all Original Medicare Part A and Part B health coverage and sometimes covers Part D prescription drug coverage. PPOs have network doctors and hospitals but you can also use out-of-network providers, usually at a higher cost.

**Medicare Private Fee-For-Service (PFFS) Plan:**  
A Medicare Advantage Plan in which you may go to any Medicare-approved doctor, hospital and provider that accepts the plan's payment, terms and conditions and agrees to treat you -- not all providers will. If you join a PFFS Plan that has a network, you can see any of the network providers who have agreed to always treat plan members. You will usually pay more to see out-of-network providers.

**Medicare Point of Service (POS) Plan:**  
A type of Medicare Advantage Plan available in a local or regional area which combines the best feature of an HMO with an out-of-network benefit. Like the HMO, members are required to designate an in-network physician to be the primary health care provider. You can use doctors, hospitals, and providers outside of the network for an additional cost.

**Medicare Special Needs Plan (SNP):**  
A Medicare Advantage Plan that has a benefit package designed for people with special health care needs. Examples of the specific groups served include people who have both Medicare and Medicaid, people who reside in nursing homes, and people who have certain chronic medical conditions.

**Medicare Medical Savings Account (MSA) Plan:**  
MSA Plans combine a high deductible health plan with a bank account. The plan deposits money from Medicare into the account. You can use it to pay your medical expenses until your deductible is met.

**Medicare Cost Plan:**  
In a Medicare Cost Plan, you can go to providers both in and out of network. If you get services outside of the plan's network, your Medicare-covered services will be paid for under Original Medicare but you will be responsible for Medicare coinsurance and deductibles.

**Medicare Medicaid Plan (MMP):**  
An MMP is a private health plan designed to provide integrated and coordinated Medicare and Medicaid benefits for dual eligible Medicare beneficiaries.

**Dental/Vision/Hearing Products**

# Prospect View of the eSOA



**Beneficiary Agreement**

By approving this Scope of Sales Appointment Confirmation Form, you agree to a meeting with a sales agent to discuss the types of products which are check marked above.

Please note, the person who will discuss the products is either employed or contracted by a Medicare plan. They do not work directly for the Federal government. This individual may also be paid based on your enrollment in a plan. Signing this form does NOT obligate you to enroll in a plan, affect your current or future enrollment, or enroll you in a Medicare plan.

Requested Meeting Date:  
08/04/2017

Created Date:  
8/4/2017 12:23:08 PM

Yes No

They will tap 'Yes' to approve the meeting or 'No' to reject it

By approving this Scope of Sales Appointment Confirmation Form, you agree to a meeting with a sales agent to discuss the types of products which are check marked above.

Please note, the person who will discuss the products is either employed or contracted by a Medicare plan. They do not work directly for the Federal government. This individual may also be paid based on your enrollment in a plan. Signing this form does NOT obligate you to enroll in a plan, affect your current or future enrollment, or enroll you in a Medicare plan.

Requested Meeting Date:  
08/04/2017

Created Date:  
8/4/2017 12:23:08 PM

Scope of Appointment Approved

They will get a confirmation of the meeting approval

# Viewing an Accepted eSOA



The screenshot shows the Ascend mobile app interface. On the left is a navigation menu with icons for Recordings, Resources, and Help. The main content area is divided into two sections: 'Scheduled Meetings' and 'Past Meetings'. The 'Scheduled Meetings' section lists two meetings, both marked as 'Accepted'. A callout box points to the 'Accepted' status of the July 04, 2017 meeting, stating: 'Tap on the Accepted meeting to view the eSOA'. Another callout box points to the 'Accepted' status of the August 04, 2017 meeting, stating: 'You will see that they have completed the eSOA when you see "Accepted" in Ascend'. The 'Past Meetings' section lists two meetings, both marked as 'Test Disposition'.

Scheduled Meetings	
Aug 04, 2017	Accepted
Jul 04, 2017	Accepted

[Schedule a Meeting](#)

Past Meetings			
Aug 04, 2017	01:03 PM	Chris Jaffe	Test Disposition
Aug 04, 2017	12:19 PM	Chris Jaffe	Test Disposition

# eSOA Status



If they have not yet responded to the eSOA, status will be “Pending”

Tap here if you want to resend the eSOA

**Meeting #100009**

Pending

**Start Meeting**

Date: Jun 07, 2018

Held By: -

Time: -

Duration: -

Re-Send Text Invite

Approve Invite

Delete

**Document Title and Instructions**

### Scope of Sales Appointment Confirmation Form

The Centers for Medicare and Medicaid Services requires agents to document the scope of a marketing appointment prior to any individual sales meeting to ensure understanding of what will be discussed between the agent and the Medicare beneficiary (or their authorized representative). All information provided on this form is confidential and should be completed by each person with Medicare or his/her authorized representative.

**Products to Discuss**

Please select the type of product(s) you want the agent to discuss.

(Refer to the product type descriptions below for more details)

Stand-alone Medicare Prescription Drug Plans (Part D)

**Done**





## **PAPER SCOPE OF APPOINTMENT**



# Paper Scope of Appointment

- If you are unable to complete an eSOA, AMA does has the ability to scan a paper SOA.

Date	Time	Held By	Status
Jun 06, 2018	11:41 PM	Bryan Holland	TEST DISPOSITION
Jun 06, 2018	10:43 PM	Bryan Holland	TEST DISPOSITION
Jun 06, 2018	08:37 PM	Bryan Holland	Application Submitted

- Take a picture of the paper scope, select the requested meeting date, and Save the scope. It will attach to the enrollment application.

What kind of Scope of Appointment do you want to create?

- Electronic Form
- Paper Form
- Close

Click 'Add Scan' to start adding scans

Requested Meeting Date: MM/DD/YYYY

Add Scan Done



**APPOINTMENTS**

# Appointments



Home visits can be identified by the icon of a house



Appointments

Recordings

Resources

Help


## Appointments

Enable iOS Calendar Sync


There are two types of appointments in Ascend

### Upcoming Appointments

Jun 06, 2018

 **09:00 PM** **132 MAIN ST, Springfield, Indiana 47404**  
Jane Doe (321) 517-4567

Jun 15, 2019

 **11:00 AM** **Demo Seminar**  
Test Area (321) 456-9877

Select an upcoming appointment to view its details

Seminars will display this icon

### Past Appointments

Date	Description/Lead Name
------	-----------------------

You can also select past appointments to view their details

# Home Visit Info Screen



You can start a meeting from the Home Visit screen

You can also associate an existing Scope of Appointment with the visit

**Home Visit with Jane Doe**

[Start Meeting](#)

**May 26**  
01:00 PM

**1331 S Curry Pike**  
Bloomington, Indiana. 47403

**Contact**  
(812) 320-1832

[Go To Lead](#)

[Add Existing Scope](#)

[Get Directions](#)







[Cancel Appointment](#)

Click here to get directions to the Home Visit

# Seminar Info Screen



**Bryan Holland** 1  
Unavailable Not Accepting Calls

-  Home
-  Leads
-  Appointments
-  Recordings
-  Resources
-  Help

## Demo Seminar

 **June 15**  
11:00 AM

 **Test Area**  
N1249 County Road F

 **Contact**  
3214569877

[Get Directions](#)

Clicking here  
will take you to  
a larger map



## Guest List

Doe, Jane	<input checked="" type="checkbox"/> Attended >
Doe, John	<input checked="" type="checkbox"/> Attended >
FOREMAN, BRIAN	<input checked="" type="checkbox"/> Attended >
STALLINGS, CHRISTOPHER	<input type="checkbox"/> Did Not Attend >
Newbie, Test	<input type="checkbox"/> Did Not Attend >
Keeven, Bryan	<input type="checkbox"/> Did Not Attend >

You can verify who did  
and did not attend a  
seminar



**RECORDINGS**

You can choose whether to use a Wi-Fi or data plan

**Bryan Holland**  
Unavailable Not Accepting Calls



### Recordings

Only upload on WiFi

**Upload All Recordings**

Tap here to upload all recordings

Lead Name	Creation Date	Status
Jane Doe	06/06/2018 20:34:12	Not Uploaded
Jane Doe	06/06/2018 20:36:28	Not Uploaded
Jane Doe	06/06/2018 20:37:16	Not Uploaded

Warning! Your managers will set a limit on how many meetings you can store before you have to upload. Centene's limit is **10**

Lead Name	Creation Date	Status
Jane Doe	06/06/2018 20:34:12	Success
Jane Doe	06/06/2018 20:36:28	Success
Jane Doe	06/06/2018 20:37:16	Success

Once they have uploaded, they will turn green and say 'Success' temporarily. They will leave your device.







# RESOURCES



# Resources



Resources are useful documents and materials stored in Ascend by managers. They can be anything from links, documents or videos.

You can also create a list of favorite resources by selecting the star next to a resource

## Resources

### Bookmarked

File/Folder	Creation Date
<input type="checkbox"/> AQE/VBE Training - External Agents	★ Mar 07, 2019
<input type="checkbox"/> Blue Button Demo	★ Oct 16, 2019



- Appointments
- Recordings
- Resources**
- Help

Search resources here



Presentation Materials

[View Resources](#)



Agent Guidelines

[View Resources](#)



Other

[View Resources](#)

Or tap on 'View Resources' below



**HELP**



# Help



For help with Ascend, please contact the Helpdesk.



866.338.7772



[help@ascendproject.com](mailto:help@ascendproject.com)



[User Manual](#)

**Version:** 2018.4.10.08

**OS Version:** iOS 11.4.1

**Name:** iPad (2)

**Connection:** Online - Wifi

- The Help Screen that populates will provide you with contact information for the Ascend Helpdesk, the Ascend User Manual, version information, the name of the iOS device, as well as the connection type.
- **Note: *This screen is for technology issues only!***



**REMOTE AGENT  
TELEPHONIC  
ENROLLMENT  
(RATE)**

# What is RATE?



- Remote Agent Telephonic Enrollment (RATE) is a powerful enrollment tool within the Ascend Mobile Application (AMA) that enables you to enroll your clients by phone.
- RATE is available on both iPad and Windows

# What are the benefits?



- **Save Money**
  - Enrolling via phone saves you on gas, tolls, and vehicle wear and tear because you will not have to drive back to your clients' homes to complete their enrollments.
- **Save Time**
  - RATE shortens the sales cycle, which allows you to see more clients.
- **Ensure Compliant Selling**
  - By using the RATE tool, the call is instantly and automatically recorded, which can help protect you from complaints later.



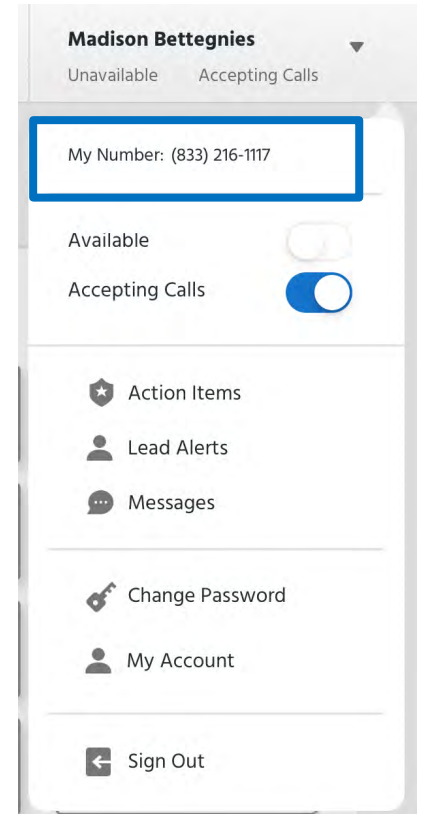
**HOW DOES IT WORK?**



# Step 1



- Schedule an appointment with your prospect at a time where you are both available.
- Your unique RATE number can be found in the drop-down menu in the Ascend Mobile Application. Provide this to the prospect.
- You cannot receive a RATE call if you are in a meeting already.
- If you are doing a telephonic enrollment without meeting face-to-face with the beneficiary first, a scope of appointment is still required. This can be done through Ascend's eSOA function, paper SOA, or by calling the AVL line.

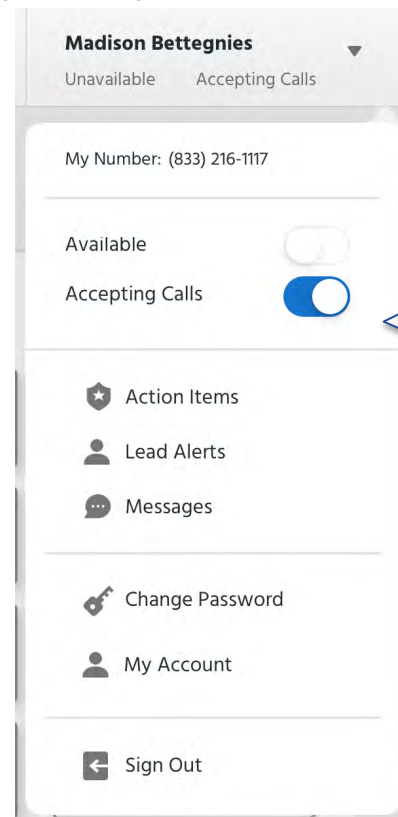


Note: 'Unavailable' does not relate to RATE. Please disregard.

## Step 2



- At the scheduled appointment time, your client will call your unique RATE-specific 1-800 phone number. Ensure you are ready to accept the call by toggling on the 'Accepting Calls' feature on the drop-down menu in AMA. You will receive the call through the Ascend app on your iPad.



Ensure that 'Accepting Calls' is toggled on to receive RATE calls.

# Receiving the Call



The screenshot shows the Ascend CRM interface. At the top left is the Ascend logo. The user's name, Madison Bettegnies, is in the top right, with status indicators for 'Unavailable' and 'Accepting Calls'. A sidebar on the left contains navigation icons for Home, Leads, Appointments, Recordings, and a folder icon. The main area is titled 'Welcome Madison' and features a section 'What would you like to do today?' with a grid of buttons for various presentations and agent portals across different states (AR, AZ, CA, FL, IN, KS, LA, NM, OH, TX, WI). An 'Incoming Call' modal is centered, displaying call details and two buttons: 'Answer Call' (blue) and 'Reject Call' (red). A callout box points to the 'Answer Call' button with the text: 'Click the 'Answer Call' button to answer your prospect's call.' Below the modal is a 'New Leads' table.

Name	Date Modified	Source	Status	County	Zip Code
Test, Harper	Mar 06, 2019	Self Generated	-		15014
Test, Crosby	Mar 06, 2019	Self Generated	-		15014

# Lead Screen



- After accepting the call, you will be directed to the 'Lead' screen.

**Ascend** Madison Bettegnies  
Unavailable Connected

**Test, Harper** Mar 07, 2019 Self Generated

Contact Lead Start a Meeting

**Appointments**

Meeting Type	Date	Time
There are no appointments for this lead. Any appointments will be displayed here.		

Create a Scope of Appointment Create Home Visit

**Past Meetings**

Date	Time	Held By	Status
No Meetings on record for this Lead. Any held meetings with this lead will show here.			

**Offline Enrollments**

Meeting Time	Status	ID
No Offline Enrollments pending for this Lead. Any Offline Enrollments created through Ascend for this lead will show here.		

**Notes**

Click 'Start a Meeting.'  
From here the application is completed using AQE.

Note you are in an active RATE call by viewing the green phone on the navigation pane.

# Start a Meeting



The screenshot shows the Ascend mobile application interface. At the top left is the Ascend logo. At the top right is an "End Meeting" button. Below the logo is a "Resources" icon. The main content area has the heading "Let's get started!" followed by "This health plan will cover: Harper Test" and "Your current zip code is". A blue "Continue" button is visible. A white recording disclaimer overlay is centered on the screen, containing the following text:

**Recording Disclaimer**  
Agent: Ascend Mobile Application (AMA) is intended for appointments where the beneficiary or their authorized representative is physically present with the sales agent. Telephonic enrollments require access to AMA's Remote Agent Telephonic Enrollment (RATE) feature on a compatible iOS device and may only occur following an in-person appointment. RATE is currently not available in all sales regions.

Beneficiary: I acknowledge this meeting will be recorded and used, in addition to my application, as proof of enrollment. Do you consent to the recording?

At the bottom of the disclaimer are two buttons: "Agree" and "Do Not Agree".

A callout box on the right side of the disclaimer overlay contains the text: "The recording disclaimer will appear."

# Step 3



- Talk the prospect through the approved telephonic enrollment script, located in Resources under Agent Guidelines (Allwell/HealthNet/Ascension) and WellCare RATE (WellCare scripts).
- It will be easiest for you if you have another device or a hard copy of the RATE Telephonic Enrollment Script so you can read the script separately from entering the application and not have to toggle back and forth.

**RATE Telephonic Enrollment Script - English**

1 of 9

**Type of Script:** <2019> Telephonic Enrollment (Ascend)  
**Department Using:** Inside Sales  
**Type of Employee Using:** Inside Sales Representatives

**Telephonic Enrollment Call**

- This script will be used by Licensed Inside Sales Representatives when completing/conducting Medicare Advantage enrollments over the telephone.
- This script will be utilized once a caller/beneficiary has indicated that he/she would like to enroll over the telephone.
- Telephonic Enrollments may be completed on an outbound call only **if** the beneficiary has an existing business relationship (active member) with our MA organization. If the beneficiary does not have an existing business relationship with our MA organization, it will need to be completed on an inbound call.
- *Italic items are instructional for the Inside Sales Representatives.*
- **Bolded, italics items must be confirmed or inquired to the beneficiary**
- **Bolded statements must be read verbatim.**

**TELEPHONIC ENROLLMENT**

*If for an MA HMO, MAPD HMO, MAPD SNP or MAPD PPO Enrollment:*

*If beneficiary is leaving an MA-only plan or enrolling into an MA-only plan with no creditable prescription drug coverage, explain to the beneficiary the late enrollment penalty for not having prescription drug coverage.*

*If a plan offers optional benefit buy up package(s), review the buy up package(s) and premium amount(s) and ask if he/she would like to add the buy-up package.*

*Remember to add the buy-up package if the beneficiary is eligible.*



# ASCEND QUOTE & ENROLLMENT



**GETTING STARTED**



# Start a Meeting in AMA



**Ascend** Madison Bettegnies  
Unavailable Accepting Calls

Home Leads Appointments Recordings

**Jo, Harper**  
May 12, 2020 Self Generated

Contact Lead Start a Meeting

**Do you have a Scope of Appointment?**

Date	Time	Form Type	Status
Jun 08, 2020	-	Electronic	Accepted

Enter Scope of Appointment ID (Optional...)

Start Meeting Cancel Meeting

**Offline Enrollments**

Meeting Time	Status	ID
No Offline Enrollments pending for this Lead. Any Offline Enrollments created through Ascend for this lead will show here.		

Navigate to the desired lead and select 'Start a Meeting'

If you already have an eSOA, select it from the list then click 'Start Meeting'

# Recording Disclaimer



**Recording Disclaimer**

Agent: Ascend Mobile Application (AMA) is intended for appointments where the beneficiary or their authorized representative is physically present with the sales agent. Telephonic enrollments require access to AMA's Remote Agent Telephonic Enrollment (RATE) feature on a compatible iOS device and may only occur following an in-person appointment. RATE is currently not available in all sales regions.

Beneficiary: I acknowledge this meeting will be recorded and used, in addition to my application, as proof of enrollment. Do you consent to the recording?

[Agree](#)      [Do Not Agree](#)

Click Agree to record the meeting

Click Do NOT Agree to not record the meeting

- Once a meeting is started, you will be asked whether you would like to record the meeting
- Note: Remember to read the disclaimer to the prospect before agreeing or disagreeing to record the meeting!

# Name & Zip Code



Not Recording 00:00:02 End Meeting



Resources

## Let's get started!

This health plan will cover: Harper Jo

Your current zip code is 90015

Continue

Verify the beneficiary's name and zip code here.

The Beneficiary's name and zip code will automatically populate here. Verify that they are correct, then click 'Continue.'

# Zip Code with Multiple Counties



**Ascend**

Not Recording 00:00:02 End Meeting

Type Size A A Home

Resources

Health Profile 1 ZIP Code 2 Blue Button 3 My Drugs 4 My Doctor 5 Our Plans

What county do you live in?

Greene

Monroe

Continue

If there are multiple counties for a zip code, select the correct county.



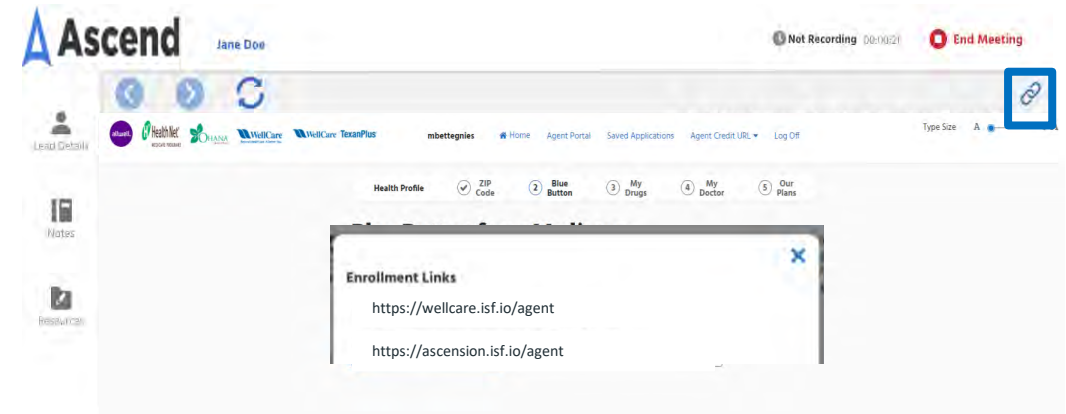
## **CHANGING URLS**

Only applies to agents also selling Ascension Complete

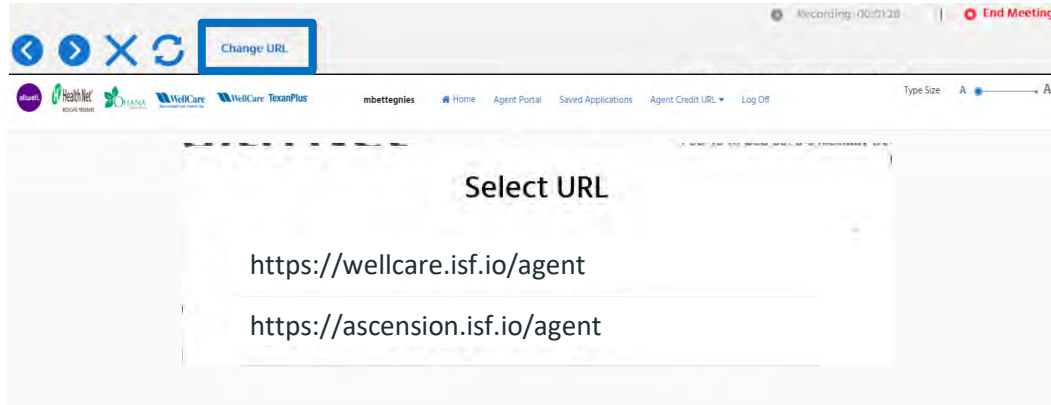
# iOS



- From the enrollment page, select the hyperlink icon
- A drop-down list will appear if the agent is ready to sell in multiple markets
- Select the desired URL



# Windows



- From the enrollment page, click 'Change URL' at the top of the page
- A drop-down list will appear if the agent is ready to sell in multiple markets
- Select the desired URL



**AQE SHOPPING TOOLS**





# **Blue Button 2.0**

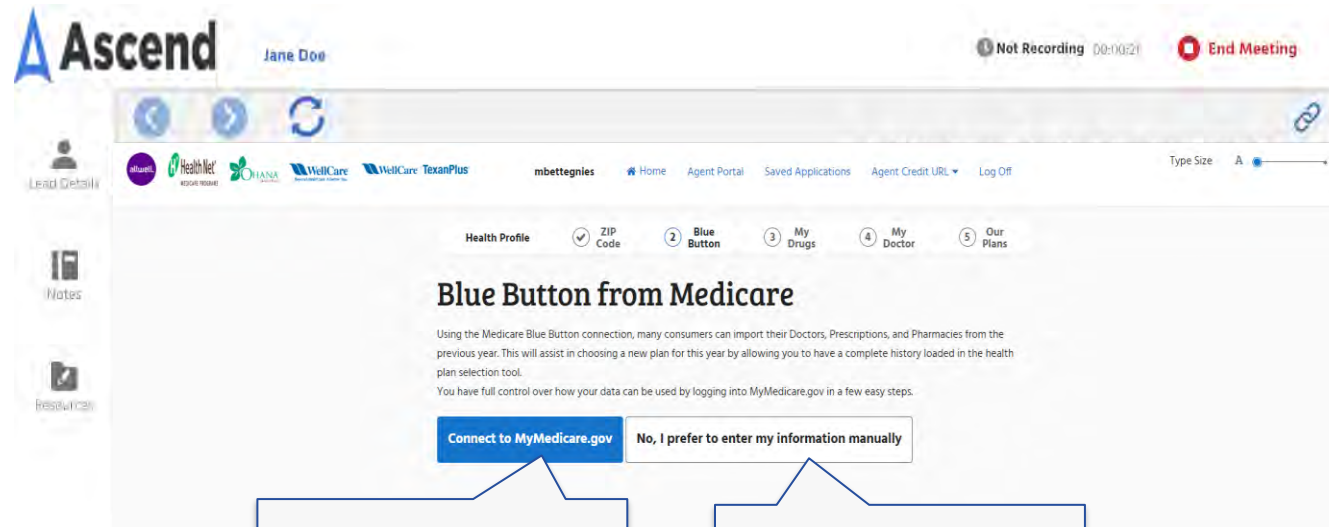
## **AQE Shopping Experience**

# What is Blue Button 2.0?



- Centers for Medicare and Medicaid Services (CMS) initiative to expand access to health information and improve the seamless exchange of data in healthcare – PROMOTE INTEROPERABILITY by giving patients access to their data
- **Beneficiary must use their Mymedicare.gov login or create an account**
- **Not eligible when using RATE**
- Contains up to 4 years of Fee-For-Service medical claims and Part D drug claims
- Can be used to:
  - Access doctors, medications, and pharmacies to assist in shopping experience
  - Lessen the time spent entering information manually
  - More accurately capture beneficiary information for shopping experience

# How to Access Blue Button 2.0

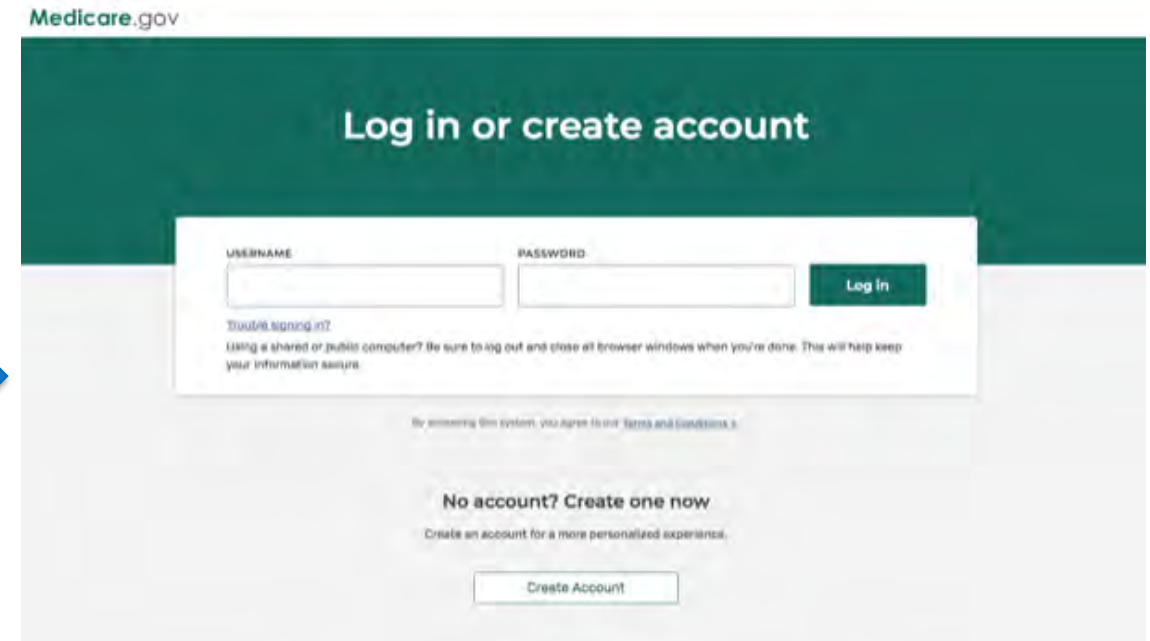
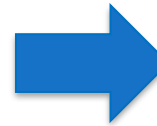
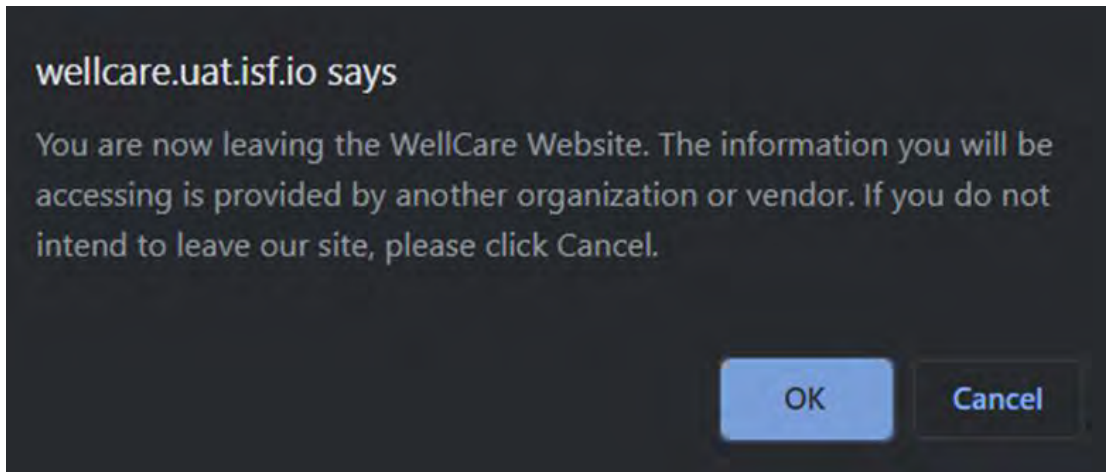


Will take you to MyMedicare.gov

Will take you to the next lookup tool

Navigate to the 'Blue Button' shopping tool and click 'Connect to Mymedicare.gov'

# How to Access Blue Button 2.0 (cont.)



A pop-up box will appear notifying the user that they are being directed to Mymedicare.gov

The beneficiary will need to log in with existing Mymedicare.gov credentials or create an account



# Creating a MyMedicare.gov Account

# How to Create a MyMedicare.gov Account



- Select 'Create Account'
- Enter in the prospect's Medicare number as it appears on their Medicare card
- Register with the same address that the Social Security Administration or Railroad Retirement Board has on file
- Email address is **not** required
- Create a username and password
- Sign into account

Medicare.gov

## Log in or create account

USERNAME

PASSWORD

Log In

[Trouble signing in?](#)

Using a shared or public computer? Be sure to log out and close all browser windows when you're done. This will help keep your information secure.

By entering this system, you agree to our [Terms and Conditions](#).

**No account? Create one now**

Create an account for a more personalized experience.

Create Account



# Accessing Information

# Permission to Access Medicare Data



The beneficiary will need to read through the permission statement before allowing Mymedicare.gov to access their Medicare data.

Medicare.gov

Ascend Quote & Enrollment

**Ascend Quote & Enrollment wants permission to access your Medicare data.**

**Ascend Quote & Enrollment will be able to:**

- Access your Medicare claims data.
- Access your personal details like your name, address, and age.
- Store your Medicare data on their systems.
- Get updates to your Medicare data unless you revoke access.

**Understand the risks:**

You have the right to share your health information, but there may be risks. Be sure to review the app's Privacy Policy and Terms and Conditions. You can revoke an app's access to your data at any time by logging in to your [MyMedicare.gov](https://www.medicare.gov) account or calling us at 1-800-633-4227.

**Allow** **Deny**

Once they have read the statement, the beneficiary can select 'Allow' to give Mymedicare.gov access to their information or they can click 'Deny' if they wish to withhold the information



# Permission to Access Medicare Data



The beneficiary will need to decide what data they would like you to have access to before allowing Mymedicare.gov to transfer their data.

**Medicare.gov**

**Ascend Quote & Enrollment has asked for some of your data.**

Information about your doctor/hospital visits

Information about the prescription medications you take

Personal Information like your name, address, date of birth, race, and gender

**Privacy Options**

**Share all of your data**  
This app will have access to both your healthcare data and some personal information

**Share healthcare data, but not your personal info**  
Block some of your personal data like name, address, date of birth, race, and gender

**Understand how your data is being used**

To understand fully how Ascend Quote & Enrollment will use your data, please read the app's [Privacy Policy](#) and [Terms and Conditions](#).

**Allow** **Deny**

# Adding pharmacy



Health Profile    ZIP Code    Blue Button   **3** My Drugs   **4** My Doctor   **5** Our Plans

## What pharmacy do you use?

Search by pharmacy name

ZIP Code:    **Within: 5 Miles**   [More](#)    Mail Order    Retail    Preferred

Here are the pharmacies you have used previously.

- WAL-MART PHARMACY 10-1991**  
3585 W State Road 45, Bloomington, IN 47403  
Retail
- SAMS PHARMACY 10-6437**  
3205 W State Road 45, Bloomington, IN 47403  
Retail
- KROGER PHARMACY**  
4025 S Old State Road 37, Bloomington, IN 47401  
Retail
- CVS PHARMACY #06698**  
2650 S Walnut St, Bloomington, IN 47401  
Retail

**Map**    **Satellite**  
 **Terrain**

Walmart Supercenter

Database last updated on June 05, 2020

**MARSH DRUGS LLC**  
2426 S Walnut St, Bloomington, IN 47401

**My Pharmacy**

Name	Location	
Wal-Mart Pharmacy 10-1991	IN 47403	<input type="button" value="Remove"/>

Database last updated on June 05, 2020

Blue Button 2.0 will populate a list of previously used pharmacies. Select one to add to the quoting process or search for one manually

# Adding drugs



Health Profile  ZIP Code  Blue Button  3 My Drugs  4 My Doctor  5 Our Plans

To make adding medications easy, here is a list of those you have taken previously. The most recent ones are listed first.

- Isosorbide Mononitrate
- Lantus Solostar
- Gabapentin
- Novolog
- Nexium
- Atorvastatin Calcium
- Fluticasone Propionate
- Lisinopril
- Spiriva
- Hydrocodone Bitartrate And Acetaminophen

1 2 3 4 5

### What drugs are you taking?

Search By Drug Name

### Lisinopril

DosageForm

What dosage do you take?

Lisinopril Tablet Oral 10 MG

How much do you need?

- 1 +

How long does the prescription last?

Every 1 month  
 Every 2 months  
 Every 3 months

U V W X Y Z

### My Prescriptions

Drug Name	Dosage		
Lantus Solostar	Lantus Solostar Solution Pen-injector Subcutaneous 100 UNIT/ML refilled every 30 days	<input type="button" value="Remove"/>	<input type="button" value="Edit"/>
Lisinopril	Lisinopril Tablet Oral 10 MG refilled every 30 days	<input type="button" value="Remove"/>	<input type="button" value="Edit"/>

Database last updated on June 05, 2020

Blue Button 2.0 will populate a list of previously prescribed medications. By clicking on one, you will be able to select the dosage and frequency to add to the Medicine Cabinet.

# Adding Doctors



The ability to search for doctors will follow the normal flow

Providers visited previously will populate on the Doctor Search page after selecting 'Allow' on the Mymedicare.gov screen

## Who is your doctor?

Search by Doctor Name

ZIP Code:  ZIP Code    Within: 5 Miles     [Advanced Search](#)

Here are the providers you have used previously.

<b>Galanti, Patricia</b> <input type="button" value="i"/> <input type="button" value="p"/> <b>Primary Care Provider</b> Allopathic & Osteopathic Physicians, Family Medicine NPI: 1376629477 1664 W Smith Valley Rd, Greenwood, IN 46142 <a href="#">More Locations</a> <input type="button" value="v"/> <a href="#">More</a>	43.8 Miles	Accepting Patients	<input type="button" value="+ Add"/>
<b>Thompson, Gloria</b> Behavioral Health & Social Service Providers, Social Worker, Clinical NPI: 1588966485 5010 N Stone Mill Rd, Bloomington, IN 47408 <a href="#">More</a>	10.7 Miles	Accepting Patients	<input type="button" value="+ Add"/>

Database last updated on February 6, 2018

Import the Primary Care Provider form the Blue Button data with the 'Add' button to include them in the quoting process

# Adding Doctors (cont.)



My Doctor				
	Name	Type of Specialist	Location	
Selected	Galanti,	Allopathic & Osteopathic Physicians,	IN	Remove
PCP	Patricia	Family Medicine	46142	Edit

After 'Adding' a doctor, you will notice that the PCP has been added to the shopping tool to populate on the application

Database last updated on February 6, 2018

**Continue**



# Pharmacy Search Manual Entry



Health Profile  ZIP Code  Blue Button  3 My Drugs  4 My Doctor  5 Our Plans

### Do you want a specific pharmacy covered?

Clicking Yes will take you to the lookup tool

Clicking No will take you to the next lookup tool

Health Profile  ZIP Code  Blue Button  3 My Drugs  4 My Doctor  5 Our Plans

### What pharmacy do you use?

Search by pharmacy name

ZIP Code: 90015 Within: 5 Miles   Mail Order  Retail  Preferred

Database last updated on June 05, 2020

Enter the beneficiary's pharmacy information here then click the magnifying glass to search

You can also select what type of pharmacy you would like to view



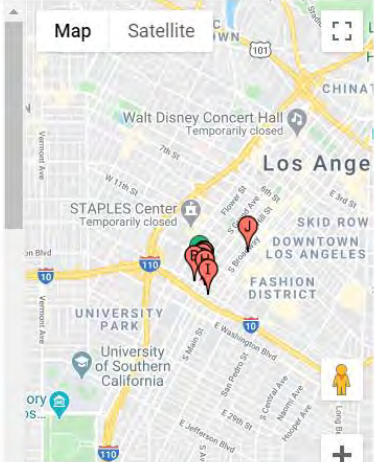
Health Profile  ZIP Code  My Drugs  My Doctor  Our Plans

## What pharmacy do you use?

Search by pharmacy name

ZIP Code: 90015 Within: 5 Miles  More  Mail Order  Retail  Preferred

- CALIFORNIA HOSPITAL MEDICAL CENTER PHARMACY  
1401 S Grand Ave, Los Angeles, CA 90015  
0.14 Miles
- GRAND SPEICALTY PHARMACY  
1513 S Grand Ave, Los Angeles, CA 90015  
0.2 Miles
- AHF PHARMACY  
1400 S Grand Ave, Los Angeles, CA 90015  
0.2 Miles
- AHF PHARMACY



A list of pharmacies in the area will populate. Select which one you would like to use by clicking on the circle next to it.



After clicking the circle, the pharmacy will appear below in 'My Pharmacy'

Ascend Jane Doe Not Recording 00:10:21 End Meeting

Lead Details Notes Resources

### My Pharmacy

Name	Location	
California Hospital Medical Center Pharmacy	1401 S Grand Ave CA 90015	<a href="#">Remove</a>

Database last updated on May 01, 2020

[Continue](#)





# Formulary Search Manual Entry

Ascend Jane Doe

Not Recording 00:00:21 End Meeting

Lead Details

Health Profile ZIP Code Blue Button My Drugs My Doctor Our Plans

Do you take any prescription drugs?

Yes No

Clicking Yes will take you to the lookup tool

Clicking No will take you to the next lookup tool



Search formularies by typing the formulary in the box or by selecting the first letter of the formulary from the alphabet below

Ascend Jane Doe

Not Recording 00:00:21 End Meeting

Lead Details

Health Profile ZIP Code Blue Button My Drugs My Doctor Our Plans

What drugs are you taking?

Search By Drug Name

Browse Alphabetically

A	B	C	D	E	F	G	H	I	J
K	L	M	N	O	P	Q	R	S	T
U	V	W	X	Y	Z				

Skip

Database last updated on June 05, 2020



# What drugs are you taking?

lisin Clear Q

Lisinopril + Add

Lisinopril-Hydrochlorothiazide + Add

A drop-down list of suggested formularies will populate if you start typing in the search box. If you select one from the list, you will be taken directly to the Drug Details screen

If you search by the first letter of the formulary, you will be taken to a list of all formularies that start with that letter. Scroll through the list until you find your formulary you are searching for. Once you found it, click 'Add to Medicine Cabinet' to be taken to the Drug Details screen

**Browse Alphabetically**

A	B	C	D	E	F	G	H	I	J
K	L	M	N	O	P	Q	R	S	T
U	V	W	X	Y	Z				

Showing: 1 to 10 of 250

- Labetalol HCl**  
Solution, Tablet, Powder, Solution Prefilled Syringe + Add
- Lac-Hydrin**  
Lotion, Cream + Add
- Lacrisert**  
Insert + Add



**Wellbutrin XL**  
DosageForm

**What dosage do you take?**

Wellbutrin XL Tablet Extended Release 24 Hour Oral 150 MG

Wellbutrin XL Tablet Extended Release 24 Hour Oral 300 MG

**Packages**

Bottle of 30 Tablet Extended Release 24 Hour

Bottle of 15 Tablet Extended Release 24 Hour

**How many packages do you need?**

- 1 +

**How long does the prescription last?**

Every 1 month

Every 2 months

Every 3 months

**Add to Prescriptions** **Cancel**

On the Drug Details screen, select the dosage, quantity needed, and the frequency at which the beneficiary needs the formulary. Then click 'Add to Prescriptions' to add it to My Prescriptions.

If a generic alternative is available for the medication, a pop-up box will appear with the generic medication.

wellcare.uat.isf.io says

Do you want to choose the generic alternative BuPROPion HCI ER (XL) instead?

**OK** **Cancel**

Clicking Ok will add the generic alternative.

Clicking Cancel will add the name brand.



U

V

W





X

Y

Z

Once you have added a medication, it will appear in 'My Prescriptions' at the bottom of the screen

### My Prescriptions

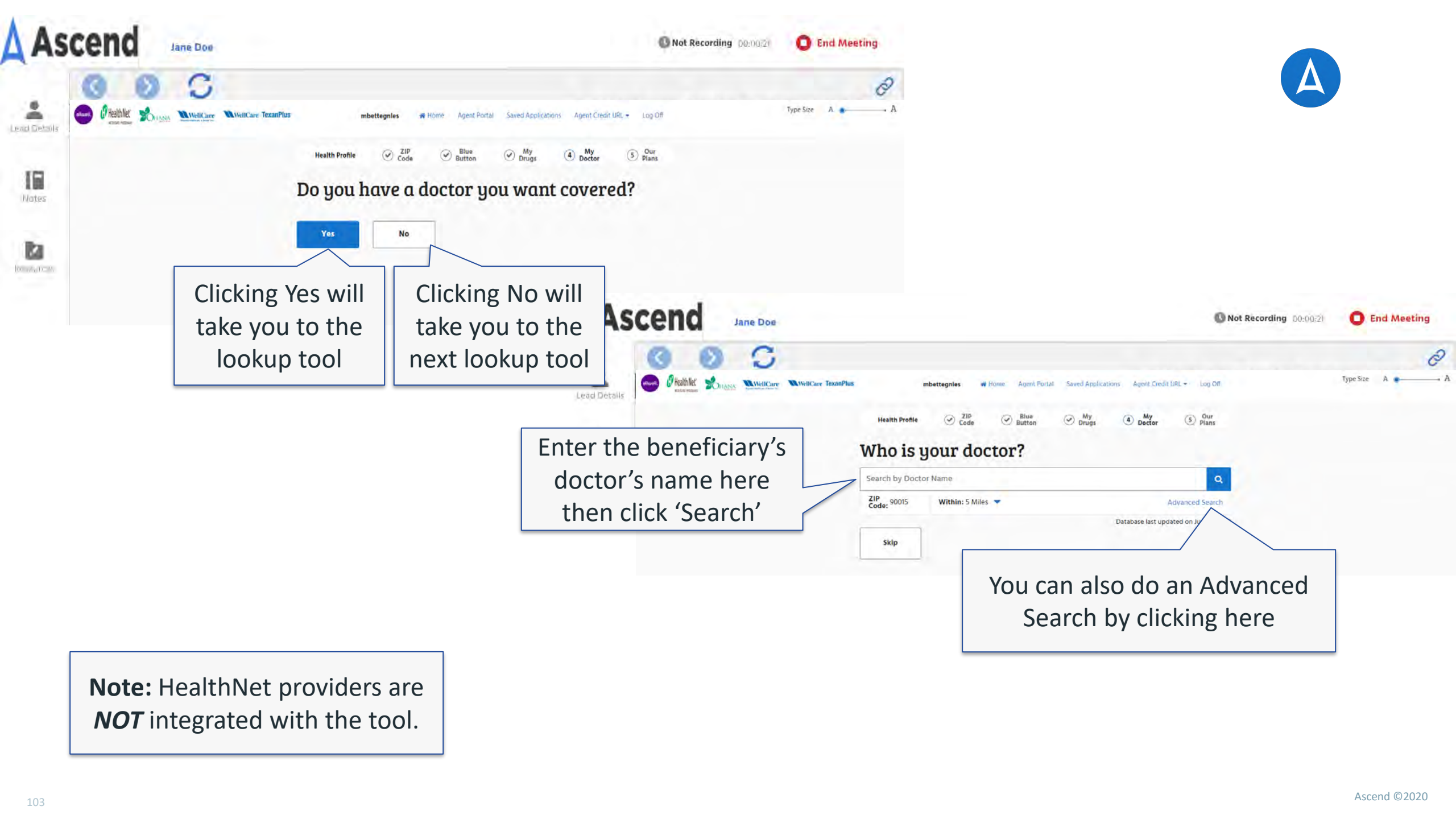
Drug Name	Dosage		
Lisinopril	Lisinopril Tablet Oral 2.5 MG refilled every 30 days	 Remove	 Edit
BuPROPion HCI ER (XL)	BuPROPion HCI ER (XL) Tablet Extended Release 24 Hour Oral 300 MG refilled every 30 days	 Remove	 Edit

Database last updated on May 01, 2020

Continue



# Doctor Search Manual Entry



Clicking Yes will take you to the lookup tool

Clicking No will take you to the next lookup tool

Enter the beneficiary's doctor's name here then click 'Search'

You can also do an Advanced Search by clicking here

**Note:** HealthNet providers are *NOT* integrated with the tool.



# Advanced Search



Health Profile  ZIP Code  My Drugs  **3 My Doctor**  4 Our Plans

## Who is your doctor?

**Advanced Search**

**Doctor's Details**

Doctor's Name

Gender  Male  Female

**Services & Coverage**

Specialty

New Patients  Yes  No

Primary Care Provider  Yes  No

Network All

Medicare Plan

**Location**

Street

State

City

ZIP Code

Radius

**Search**

When doing an advanced search, you can enter in more of the doctor's personal details, services, coverage, and location.

**Doctor's Name**

**Gender**

**Services & Coverage**

- Plan
- WellCare Freedom (HMO D-SNP)
- WellCare Best (HMO)
- WellCare Plus (HMO)
- WellCare Dividend (HMO)
- Health Net Gold Select (HMO)
- Health Net Healthy Heart (HMO)
- Health Net Seniority Plus Sapphire (HMO)
- Health Net Seniority Plus Green (HMO)
- Health Net Seniority Plus Sapphire Premier (HMO)
- Health Net Seniority Plus Sapphire Premier II (HMO)
- Health Net Jade (HMO C-SNP)
- Health Net Seniority Plus Amber I (HMO D-SNP)
- Health Net Seniority Plus Amber II (HMO D-SNP)

**Specialty**

**New Patients**

**Primary Care Provider**

- WellCare Classic (PDP)
- WellCare Value Script (PDP)
- WellCare Wellness Rx (PDP)
- WellCare Medicare Rx Value Plus (PDP)
- WellCare Medicare Rx Saver (PDP)
- WellCare Medicare Rx Select (PDP)**

**Network**

**Medicare Plan**

Plan





Health Profile

ZIP Code

My Drugs

3 My Doctor

4 Our Plans

# Who is your doctor?

Search by Doctor Name



ZIP Code: 90015

Within: 5 Miles

Advanced Search

Showing: 1 to 10 of 680

**Bonman, Shauntelle** Primary Care Provider

Allopathic & Osteopathic Physicians, Family Medicine

NPI: 1811272719

1400 S Grand Ave, Los Angeles, CA 90015

[More](#)

0.3 Miles Accepting Patients

+ Add

**Kohan, Rozalin** Primary Care Provider

Student, Health Care, Student in an Organized Health Care

Education/Training Program

NPI: 1255746145

1400 S Grand Ave, Los Angeles, CA 90015

[More](#)

0.3 Miles Accepting Patients

+ Add

If searching in a radius, a list of doctors in the area will populate. Select which one you would like by clicking 'Add'

Once you have added a doctor, they will appear in 'My Doctor' at the bottom of the screen

Click 'More' to view Doctor Details

My Doctor			
Name	Type of Specialist	Location	
Bonman, Shauntelle	Allopathic & Osteopathic Physicians, Family Medicine	CA 90015	Remove

Continue

Database last updated on May 1, 2020

# Doctor Details



**Bonman, Shauntelle** ✕  
1400 S Grand Ave , Ste 700 , Los Angeles, CA 90015.

**NPI:** 1811272719

**Gender:** Female

**Accepting Patients:** New and Existing

**Primary Care Provider:** Yes

**Office:** 213-765-7500

**Fax:** 213-765-7491

**Languages:** SPANISH

**Additional Locations:**

Address	Accepting Patients
1400 S Grand Ave , Ste 700 , Los Angeles, CA 90015.	New and Existing

**Hours**

**Wednesday:** 09:00 AM - 05:00 PM

**Monday:** 09:00 AM - 05:00 PM

**Thursday:** 09:00 AM - 05:00 PM

**Tuesday:** 09:00 AM - 05:00 PM

**Friday:** 09:00 AM - 05:00 PM

**Accepted Plans:**

WellCare Dividend (HMO)

WellCare Best (HMO)

WellCare Freedom (HMO D-SNP)

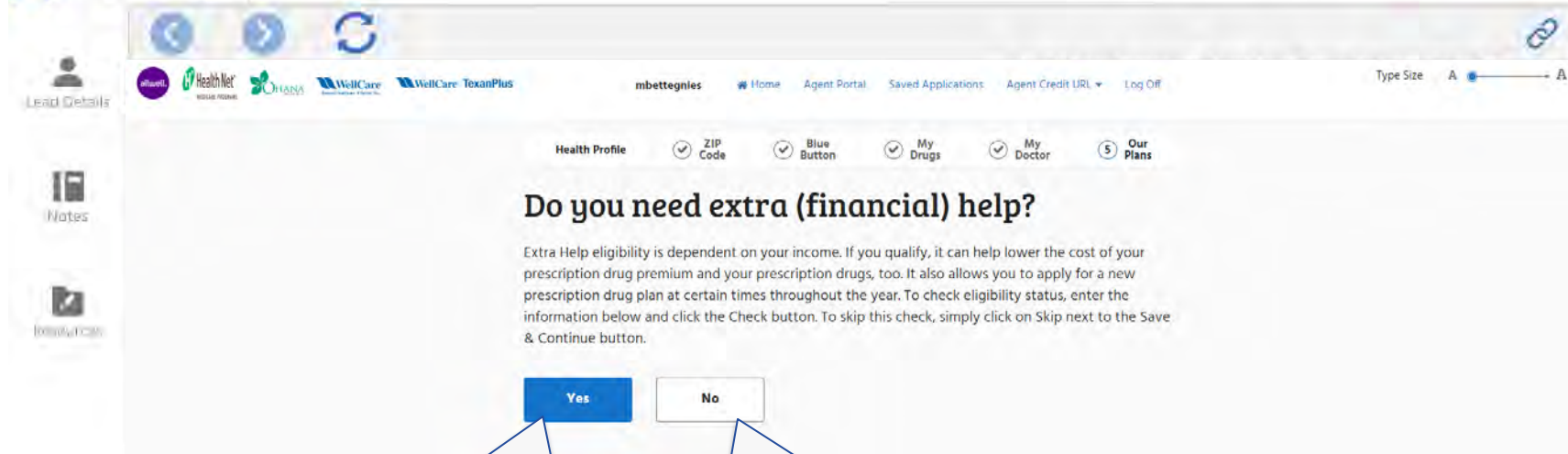
WellCare Plus (HMO)

[Add to My Doctors](#)

On the Doctor Details screen, you will see more information about the doctor, office location and hours, and plans accepted within the zip code provided.



**Extra Help/LIS Check  
+  
Medicaid Verification**



The screenshot shows a web application interface for Jane Doe. At the top, there are navigation icons (back, forward, refresh) and a search bar. Below the search bar, there are logos for various insurance providers: Alliant, HealthNet, OHANA, WellCare, and WellCare TexanPlus. The user's name 'Jane Doe' is displayed in the top right. The main content area features a form titled 'Do you need extra (financial) help?'. The form includes a sub-header 'Health Profile' and several dropdown menus for 'ZIP Code', 'Blue Button', 'My Drugs', 'My Doctor', and 'Our Plans'. The form text explains that extra help eligibility is dependent on income and can lower the cost of prescription drugs. It instructs the user to enter information and click 'Check' to verify eligibility, or 'Skip' to bypass the check. At the bottom of the form, there are two buttons: a blue 'Yes' button and a white 'No' button.

Clicking Yes will take you to the verification tool

Clicking No will take you to the Quotes page



Health Profile

ZIP Code ✓ Blue Button ✓ My Drugs ✓ My Doctor ✓ Our Plans 5

### Check Extra Help Eligibility Status

First Name: [First Name] Last Name: [Last Name]

Your Birthday: [Month] [Day] [Year]

Medicare Claim Number: [000 - 00 - 0000 - A] Medicaid State: [California Medicaid - Medi-Cal]

Medicaid Number: [0000000000] Social Security Number: [000-00-0000] Gender: [Please Choose...]

Is your mailing state different than the one selected for Medicaid?

Note\*: Along with First Name, Last Name, Date of Birth and Medicare Number; for California Medicaid - Medi-Cal, Medicaid Number is required

**Check Status**

Skip

Enter the beneficiary's Medicare Number, Last Name, and Date of Birth to see if they qualify for Extra Help. Then click 'Check Status'.

**Note:** For any date fields in AQE, enter in leading zeros if it is a single digit. (ex: January = 01)

In the Note section, the list of required fields will change based on the state selected.



**SELECTING A PLAN – QUOTES PAGE**



The screenshot shows the Ascend web application interface for Medicare plans. At the top left is the Ascend logo and the name 'Jane Doe'. A navigation bar includes 'Health Profile', 'ZIP Code', 'My Drugs', 'My Doctor', and 'Our Plans' (with a '4' indicator). Below this is the main heading '2020 Medicare Plans' and a 'Send Quote' button. To the right are 'List' and 'Compare' buttons. A text line reads: 'Below are the plans that are available in ZIP Code 90015 in Los Angeles County, California:'. Below this is a 'ZIP Code: 90015' input field and an 'Update' button. The main content area is divided into two tabs: 'Medicare Advantage' (active) and 'Prescription Drug Plan'. Under the 'Medicare Advantage' tab, a plan is listed: 'WellCare Freedom (HMO D-SNP)' by 'SHAUNTELLE BONMAN'. The plan details include 'Plan Covers' (Dental: ✗, Vision: ✓, Hearing: ✓, Rx: ✓) and 'In-Network Copay' (Primary Care Physician: \$0.00, Emergency Room: \$120.00, Specialist: \$0.00, Maximum Out-of-Pocket: \$2,500 Annual In-Network). The monthly premium is '\$0.00/month'. The WellCare logo is also present. At the bottom of the plan details are 'Apply Now' and 'View Details' buttons.

Click here to send a Quick Quote

Click compare at the top to view plans side-by-side

From this screen, you can view all plans within the selected zip code.

Selecting 'Apply Now' will take you directly to the Enrollment Application

Click here to view more details about a plan



# Plan Details



[Back To Quotes](#)

Click here to return to the previous screen

## WellCare Plus HMO

Apply Now

Click here to start an enrollment

### Plan Specifics

Coverage Type	Part A and Part B, Part D
Monthly plan premium	\$0.00
Contract ID	H5087-017
Annual Medical Deductible	\$0
Annual Prescription Deductible	\$0
Maximum Out-of-Pocket	\$2,500 Annual In-Network



### Medicare-Covered Medical Benefits

	In-Network
Primary Care Provider Office Visit	\$0.00 per visit.
Emergency Room	Emergency Room: \$120.00, if you are admitted to the hospital within 24 hours your cost share may be waived. For more information, see the Evidence of Coverage. Urgent Care: \$0.00 per visit.
Specialist Office Visit	\$0.00 per visit.
Inpatient Hospital	\$800.00 per day for days 1 through 3. \$0.00 per day for days 4 through 90.
Ambulance	20%.
Outpatient Surgery	\$0.00 per visit.
Home Health Care	\$0.00.
Durable Medical Equipment	20% per item.
Preventive Benefits	Not Covered.

<b>Fitness</b>	Free membership at participating fitness facilities. Also access to online wellness related tools, planners, newsletters and classes.
<b>Hearing Aid Coverage</b>	\$2000.00 both ears combined. See the Evidence of Coverage.
<b>Eyewear Coverage</b>	\$350.00 every year. See the Evidence of Coverage.
<b>Dental Coverage</b>	Not Covered.

### Prescription Drug Benefits

Coverage Type:	Part D					
Pre-initial coverage limit:	1 Month - Preferred Retail	3 Month - Preferred Retail	1 Month - Standard Retail	3 Month - Standard Retail	3 Month - Preferred Mail Order	3 Month - Standard Mail Order
Tier 1 - Preferred Generic	N/A	N/A	\$0.00	\$0.00	\$0.00	\$0.00
Tier 2 - Generic	N/A	N/A	\$20.00	\$60.00	\$0.00	\$60.00
Tier 3 - Preferred Brand	N/A	N/A	\$47.00	\$141.00	\$94.00	\$141.00
Tier 4 - Non-Preferred Drug	N/A	N/A	50%	N/A	50%	50%
Tier 5 - Specialty Tier	N/A	N/A	25%	N/A	N/A	N/A

### Plan Documents

[Formulary](#)  
[Summary of Benefits](#)

Apply Now

When you click view details on the previous slide, you will be taken to this screen where you can learn more about the plan

Click here to start an enrollment



# Plan Comparison



Ascend Jane Doe Not Recording 00:00:21 End Meeting

Health Profile ZIP Code Blue Button My Drugs My Doctor Our Plans

### Medicare Plans

Reset Plans List Compare

	WellCare Freedom HMO D-SNP	WellCare Best HMO	WellCare Plus HMO	WellCare Dividend HMO
Premium	\$0 <sup>00</sup> /month	\$0 <sup>00</sup> /month	\$0 <sup>00</sup> /month	\$0 <sup>00</sup> /month
Apply Now	Apply Now	Apply Now	Apply Now	Apply Now
Plan Specifics				
Annual Medical Deductible	\$0	\$0	\$0	\$0
Contract ID	H5087-001	H5087-005	H5087-017	H5087-025
Annual Prescription Deductible	\$0	\$0	\$0	\$0
Maximum Out-of-Pocket	\$2,500 Annual In-Network.	\$2,500 Annual In-Network.	\$2,500 Annual In-Network.	\$3,400 Annual In-Network.

When you compare plans, their information will be placed side-by-side so you can easily view their differences.



# THE ENROLLMENT APPLICATION



Fill in the form with the beneficiary's personal information then click 'Next' to continue.

If the information is filled in for the lead in AMA, it will carry over to the application.

Click 'Save' to keep your progress in order to return to the enrollment application at a later time

Click 'Send for signature' to send a pre-filled application to a prospect for review and signature. This works like Quick Quote



Lead Details | Contact Info | About You | 2 Your Address | 3 Emergency Contact

Back to Shopping | \$0<sup>00</sup>/month

### Where do you live?

**Residential Address**

Address 1:  Address 2:

City:

State:  Zip:  County:

Mailing Address (Only if different than Permanent Residence Address)

Mailing Address 1:  Mailing Address 2:

Mailing City:

Mailing State:  Mailing Zip:  Mailing County:

\* Required Information

Back Next

Save Send for signature

If their mailing address is different than their residence, select the box to enter their mailing address.

Fill in the form with the beneficiary's permanent residence address.



Lead Details

Contact Info  About You  Your Address  **3** Emergency Contact

Notes

Back to Shopping

\$0<sup>00</sup> /month

## Who is your emergency contact?

**Emergency Contact**

First Name:

Last Name:

Relationship to you:

Phone:

Fill in the form with the beneficiary's emergency contact then click 'Next' to continue.

**Note:** If you begin typing, all fields become required. To make them non-required again, simply delete the data.



A provider selected during the shopping experience will carry over to the application.

The screenshot shows the Ascend application interface for a user named Jane Doe. The top navigation bar includes the Ascend logo, the user name, and buttons for 'Not Recording' and 'End Meeting'. Below the navigation bar, there are tabs for 'Lead Details', 'Medicare Details', '1 PCP', '2 Insurance Info', '3 Medicare Status', and '4 Other Details'. A 'Back to Shopping' button is visible, along with a price indicator of '\$0.00/month'. The main heading is 'Who is your primary doctor?'. The form is divided into two sections: 'Primary Care Provider Details' and 'Primary Care Provider Office Address'. In the first section, there is a 'Primary Care Provider ID (PCP ID)' field with the value '1911272719' and a 'Provider Lookup' button. Below this are 'Provider First Name' (SHAUNTELLE) and 'Provider Last Name' (BONMAN) fields. The second section, 'Primary Care Provider Office Address', includes a radio button for 'Are you a current patient?' (Yes is selected), and fields for 'Address 1', 'Address 2', 'City', 'State', 'Zip', and 'County'. At the bottom of the form are 'Back' and 'Next' buttons, and a 'Save' button with a 'Send for signature' button.

Select 'Provider Lookup' to search for providers in the area.

You can also manually fill in the form with the beneficiary's primary care provider information.



Fill in the form with the beneficiary's Medicare Insurance information then click 'Verify'.

Lead Details Medicare Details  PCP  2 Insurance Info  3 Medicare Status  4 Other Details

[Back to Shopping](#) \$0<sup>00</sup>/month

## Your insurance information

**Medicare Insurance Information**

You must have Medicare Part A and Part B to join a Medicare Advantage Plan. Using the information on your Medicare card, please complete the section below.

**Medicare Number: \***

**Hospital Part A Effective Date: \*** **Medical Part B Effective Date: \***

mm/01/yyyy mm/01/yyyy

**Verify**

\* Required Information

**Back** **Next**

**Save** **Send for signature**

If the Part A and Part B Effective Dates do not return but you have verified the MBI is correct, click 'Verify' three times before being able to continue





Lead Details

Notes

Attachments

Medicare Details

PCP

Insurance Info

Medicare Status

Other Details

Back to Shopping

\$0<sup>00</sup> /month

## What is your current Medicare situation?

Typically, you may enroll in a Medicare Advantage (MA) plan only during the Annual Election Period (AEP) from October 15 through December 7 of each year. There are exceptions, called Special Election Periods (SEPs) that may allow you to enroll in a Medicare Advantage plan outside of this period. Please select the option that best fits your situation. \*

- I am newly eligible for Medicare and this is my first entitlement to enrollment.**  
Initial Coverage Election Period (ICEP) – Your ICEP begins the first three months before your entitlement to BOTH Part A and Part B and typically ends after the third month of eligibility. (Typically this relates to either your 65th birthday or your 25th month of disability)
- I am newly eligible for Medicare Part D (Prescription Drug Coverage).**  
Initial Election Period for Part D (IEP for Part D) – You may be eligible for IEP for Part D if you are entitled to Part A OR you are enrolled in Part B, AND permanently reside in the service area of a Part D plan. You may also be eligible if you previously had Medicare due to disability and are now turning 65.
- My situation falls under one of the Special Election Period circumstances.**  
Special Election Period (SEP) – You may use an SEP outside of the usual ICEP, IEP, or AEP.

\* Required Information

By answering the question(s) above you are certifying that, to the best of your knowledge, you are eligible for the Election Period you selected. If we later determine that this information is incorrect, you may be disenrolled from the plan.

Back

Next

Save

Send for signature

Select which Election Period best fits your beneficiary's situation then click 'Next'. Clicking 'My situation falls under one of the Special Election Period circumstances' will reveal all the SEP options available.





Lead Details Medicare Details PCP Insurance Info Medicare Status Other Details

Back to Shopping \$0.00/month

### Other living situations and health services

**Important Questions - Please answer the following questions**

**Do you have end-stage renal disease (ESRD)? \***

Yes  No

If you have had a successful kidney transplant and/or you don't need regular dialysis any more, you will need to send us a note or records from your doctor showing you have had a successful kidney transplant or you don't need dialysis, otherwise we may need to contact you to obtain additional information.

**Will you have other prescription drug coverage in addition to Wellcare/Ohana/Wellcare TexanPlus Healthcare Plans? \***

Yes  No

Some individuals may have other drug coverage, including other private insurance, TRICARE, Federal employee health benefits coverage, VA benefits, or State pharmaceutical assistance programs.

**Are you a resident in a long-term care facility, such as a nursing home? \***

Yes  No

**Are you enrolled in your State Medicaid program? \***

Yes  No

**Do you or your spouse work? \***

Yes  No

\* Required Information

**Document Preferences**

Please check the box below if you would prefer us to send you information in a language other than English or in an accessible format:

- Spanish
- Chinese
- Korean
- Vietnamese
- Tagalog
- Large Print

Please contact WellCare/Ohana/Easy Choice/WellCare TexanPlus if you need information in an accessible format or language other than what is listed above.

**Back** **Next**

**Save** **Send for signature**

Have your beneficiary answer the Yes/No questions listed. Some questions may need more information if you select 'Yes'.



Lead Details

Notes

Resources

Health Questions 1 Authorization 2 Payment

Back to Shopping

\$0<sup>00</sup>/month

### Information Authorization

#### Disclosure Overview

- Health Information to be Used or Disclosed
- Who May Request or Use Information
- Who is Authorized to Disclose Information
- Statements of Understanding
- Producer Compensation

Review the Disclosure overviews. If they are the one submitting the application, select this option.

Have the prospect type in their first and last name as their electronic signature

#### Authorization

I authorize the use and disclosure of health information about me as described herein.

Signature of Applicant: \*

Signature Date: \*

\* Required Information

If they are the one submitting the application, select this option.

#### Relationship

What is the relationship to the person with Medicare listed on this enrollment form? \*

I am the person listed on this enrollment form

I am the person authorized to act on behalf of the individual

\* Required Information

If someone else is submitting the application, select this option and complete the extra information.

Back Next

Save Send for signature

Lead Details

Health Questions  Authorization  **2** Payment

Back to Shopping \$0<sup>00</sup>/month

## Plan Payment

Please select a payment method:

- Send me a bill
- Electronic funds transfer (EFT) from your bank account each month
- Deduct from my monthly benefits

**Payment Overview**

Payment Frequency

Extra Help

Late Payments

**Back** **Next**

Save Send for signature



Your beneficiary has multiple options for plan payment. There may be additional fields to fill out based on the option selected. If no selection is made, they will receive a bill each month.



Ascend Jane Doe Not Recording 00:10:21 End Meeting

Lead Details Review & Purchase 1 Review

## Review \$0<sup>00</sup>/month

[Apply Now](#)

- Step 1: Health Profile
- Step 2: Contact Info
- Step 3: Medicare Details
- Step 4: Health Questions

Authorization	Signature of Applicant: <i>Harper Test</i> Signature Date: <i>06/05/2020</i> I am the person listed on this enrollment form or I am simply helping to complete this enrollment form. <i>SelfEnroll</i> Agent First Name: <i>Madison</i> Agent Last Name: <i>Bettegnies</i> Please enter your Agent Writing Number (AWN): <i>1234</i> Please confirm your Agent Writing Number: <i>1234</i>	<a href="#">Edit</a>
Payment	Payment Method: <i>Bill</i>	<a href="#">Edit</a>

By clicking the "Apply Now" button below you are confirming that everything in this application is true and correct to the best of your knowledge. Anyone giving false or misleading statements about a material fact in this electronic application, or causes someone else to do so, may face penalties under the law. By clicking "Apply Now" you are also electronically signing your completed application and submitting this to the plan. You will no longer be able to change your information once you submit. Once you submit your enrollment application you will be enrolled in this plan (if approved by CMS) and you will receive notice of acceptance or denial following submission of the enrollment to CMS.

[Apply Now](#)

Finally, review the application with the beneficiary to ensure everything is correct.

You can click 'Edit' to return to a section to change the incorrect information.

Click 'Apply Now' to submit the Enrollment Application.

# WellCare Plans



Ascend Jane Doe Not Recording 00:00:21 End Meeting

allwell HealthNet OHANA WellCare WellCare TexanPlus

Thank you for completing your Medicare application. We will review your submission and be in touch with you soon!

You have completed your enrollment for WellCare Best (HMO)

Please keep this Confirmation Number for your records: **4010046**

**Email Confirmation**  
Click here to have your confirmation number emailed to you.

**Print Application**  
Click here to print this page with your Confirmation Number.

Make sure to give them the confirmation number

You can also email them their confirmation number.

Click here to print the application summary & confirmation number



# Allwell & HealthNet Plans



**Ascend** Jane Doe

Not Recording 00:00:21 End Meeting

Lead Details

Notes

Documents

A\_A\_A

Congratulations! Your **Allwell Medicare (HMO)** application has been successfully submitted.

Please keep this Confirmation Number for your records: **1736**

**Email Confirmation**  
Click here to have your confirmation number emailed to you

**Print Application**  
Click here to print this page with your Confirmation Number

NOTE: We will not keep the email address entered on file. It will be used for the purpose of sending you emails.

If you have any questions, please contact Allwell at the number: 1-855-766-1541

Phone: 1-855-766-1541 TTY: 711

Monday thru Friday: 9AM – 5PM All Time Zones (excluding holidays)

**Value-Based Enrollment**

Start Your Value Based Enrollment Now!

Select your preferred language for the call:

English  Spanish

**Connect Me Now**  
Have a Value Based Enrollment Wellness Advocate call you now

**Schedule a Callback**  
Schedule a date and time for a Value Based Enrollment Wellness Advocate to call you back

**Decline**  
Decline the Value Based Enrollment program

Make sure to give them the confirmation number

This is where you start the VBE Program

Click here to select language

You can also email them their confirmation number.

Click here to print the application summary & confirmation number



**VALUE BASED ENROLLMENTS  
(VBE)**

**ALLWELL/HEALTHNET PRODUCTS  
ONLY**



**WHAT IS VBE?**



## VBE is:



- A quick and easy process to gather health-related information from your beneficiary after they enroll
  - After you have completed an enrollment application in Ascend, tap a button to initiate a call from a VBE rep to your beneficiary
  - Once connected, your job as the agent is finished
  - The VBE rep will complete a Health-Risk Assessment and/or help set up an Annual Wellness visit with their PCP
  - It is that simple!
  - However, there are some important steps and considerations for you to be successful...

# Who Benefits from VBE?



- **The Health Plan!**

- By completing a Health Risk Assessment
  - The health plan will be able to help ensure that the beneficiary gets the care they need which helps to reduce costs
- If they schedule an Annual Wellness Visit
  - Health care providers can help identify and prevent illness as well as schedule any other needed services which also reduces costs
- VBE reduces the cost and difficulty of contacting members later to complete HRAs
- Reduces complaints to CMS

- **You!**

- Earn the trust of your new member
  - They recognize that you are helping them get the most out of their plan right away
- Increase 'Stick Rate'
  - Enrollees who interact with their health plan right away are less likely to disenroll

- **Your Beneficiary!**

- By completing a Health Risk Assessment
  - The health plan will be able to help ensure that the beneficiary gets the care they need
- If they schedule an Annual Wellness Visit
  - Health care providers can help identify and prevent illness as well as schedule any other needed services



**INITIATING THE VBE PROCESS**

# Initiating the VBE Process



- Initiating the VBE process always occurs *after* you complete the enrollment application
- You will need to *leave the beneficiary* when they are on the VBE call
  - Remember, the health information they will share on the VBE has *no effect* on their enrollment being approved by CMS
  - To stay compliant, you should not be there to help or coach the beneficiary in any way through the health questionnaire
- Prepare by completing all your sales process steps *before* you begin the VBE:
  - Make sure to give them their enrollment confirmation number
  - Inform them when they can expect their membership cards and how to contact you
  - Explain the VBE process
  - If they agree to receive the call let them know you will excuse yourself from their home (or wherever you are meeting) once the call comes in

# Explaining the VBE Process



Invite your new member to participate in VBE



They are *not required* to do this



**Note:**

Your new member may not know why completing an HRA or setting an Annual Wellness Visit would be valuable to them and their health

The intro verbiage provided on the next slide will work for many but you should be prepared to explain as needed the 'value' of them participating in this call



- Here is suggested verbiage to invite them to participate:
  - “In order to best serve you, we have representatives on standby to assist with your transition into your new plan – they will help gather some important information related to your healthcare needs, [and to schedule your Annual Wellness Visit.] We want to make sure we do a great job of taking care of you and to ensure you’re getting the best care possible as soon as your plan is active. This should only take about \_\_\_\_ minutes – may I connect you with one of our reps right now to begin that process?”*
- If they say ‘Yes’:
  - “Great! The rep is going to ask you some questions about your current health status, and help connect you with your Primary Care Doctor’s office to schedule your Annual Wellness Visit.”
    - Then select ‘Connect Me Now’ or ‘Schedule a Callback’
- If they say ‘No’:
  - Then select ‘Decline’

# Selecting the Outcome Decided by the Beneficiary



Congratulations! Your **Allwell Medicare (HMO)** application has been successfully submitted.

Please keep this Confirmation Number for your records: **1736**

**Email Confirmation**  
Click here to have your confirmation number emailed to you

**Print Application**  
Click here to print this page with your Confirmation Number

**NOTE:** We will not keep the email address entered on file. It will be used for the sole purpose of sending an enrollment confirmation receipt.

If you have any questions about your pending application, please call Allwell at the number listed below and have your confirmation number ready.

Call for more information:  
Phone: 1-855-766-1541 TTY: 711  
Monday thru Friday: 9AM – 5PM All Time Zones  
(excluding holidays)

A\_A\_A

**Value-Based Enrollment**

Start Your Value Based Enrollment Now!

Select your preferred language for the call:

English  Spanish

**Connect Me Now**  
Have a Value Based Enrollment Wellness Advocate call you now

**Schedule a Callback**  
Schedule a date and time for a Value Based Enrollment Wellness Advocate to call you back

**Decline**  
Decline the Value Based Enrollment program

“Connect Me Now” will connect an enrollee with a Wellness Advocate on the spot. Leave the meeting location as these begin.

Schedule for a Wellness Advocate to call the enrollee at a date/time of their choosing. You can assist in setting this up.

No action is taken If decline is selected.



**CONNECT ME NOW**



# Setting the Call from the VBE Specialist



The screenshot shows a mobile application interface for Value-Based Enrollment (VBE). At the top, there is a confirmation message: "Congratulatory Allwell Me application has been... Please keep this Confirmation...". Below this, there are two main options: "Email Confirmation" (with an envelope icon) and "CALL" (a blue button). A "Connect Me Now" dialog box is open, showing a text input field for "Your number" containing "4738957348" and a "CALL" button. Below the "CALL" button, there is a note: "If your enrollee is disconnected at any time, they can dial 11 to be directly connected to a Wellness Advocate." At the bottom, there are two more options: "Schedule a Callback" (with a calendar icon) and "Decline" (with an 'X' icon). The "Decline" option includes the text "Decline the Value Based Enrollment program".

**Connect Me Now**

Your number: 4738957348

**CALL**

Wellness Advocate call you now

Schedule a Callback  
Schedule a date and time for a Value Based Enrollment Wellness Advocate to call you back

Decline  
Decline the Value Based Enrollment program

Call for more information:  
Phone: 1-855-766-1541 TTY: 711  
Monday thru Friday: 9AM – 5PM All Time Zones  
(excluding holidays)

Email Confirmation  
Click here to have your confirmation number emailed to you

Tap "CALL" to prompt a VBE rep to call the beneficiary

Beneficiary phone number auto-populates here

# Connect Me Now Process



Note that the call center system is actually placing the call



The beneficiary will be on brief hold before the VBE rep comes



When the beneficiary receives the call, they will hear the following greeting:

*“Thank you for selecting [plan name] to meet your healthcare needs. Please stay on the line to be connected with a representative who will initiate your healthcare assessment. All calls are recorded for quality assurance purposes.”*



Once the call connects, excuse yourself from the meeting and leave



If the beneficiary becomes impatient with the hold time, they can opt to schedule a VBE call at a later time



Use “Schedule a Callback” to switch to a call at a later date



**SCHEDULE A CALLBACK**

# Setting a Callback Time



**Schedule a Callback**

Provide the following information and you will receive a callback:

Date

Time Zone

Preferred Time to Contact

Phone Number to Call

Select Date and Time for callback

Select your Time Zone as call center may be in a different zone

# Callback Process



If the call center does not make contact with the beneficiary on the scheduled callback time, it will attempt contact three more times



Completion of the VBE process is of course the goal



**DECLINE**

# Declining the VBE Process



The screenshot shows a web application interface. A dark grey dialog box is centered on the screen, containing the text: "Wellcare.isf.io says You are declining the opportunity to get started on your transition process. Is that correct?". Below the text are two buttons: "OK" and "Cancel".

The background page is partially visible and includes the following elements:

- Language selection: "English" and "Spanish" with radio buttons.
- Two blue buttons: "Email Confirmation" (with an envelope icon) and "Print Application" (with a printer icon).
- A "NOTE: We will not keep the email address entered on file. It will be used for the sole purpose of sending an enrollment confirmation receipt."
- Text: "If you have any questions about your pending application, please call Allwell at the number listed below and have your confirmation number ready." followed by contact information: "Call for more information: Phone: 1-855-766-1541 TTY: 711 Monday thru Friday: 9AM - 5PM All Time Zones (excluding holidays)".
- A sidebar on the right with three blue boxes: "Connect Me Now" (with an info icon), "Schedule a Callback" (with a calendar icon), and "Decline" (with an 'X' icon).

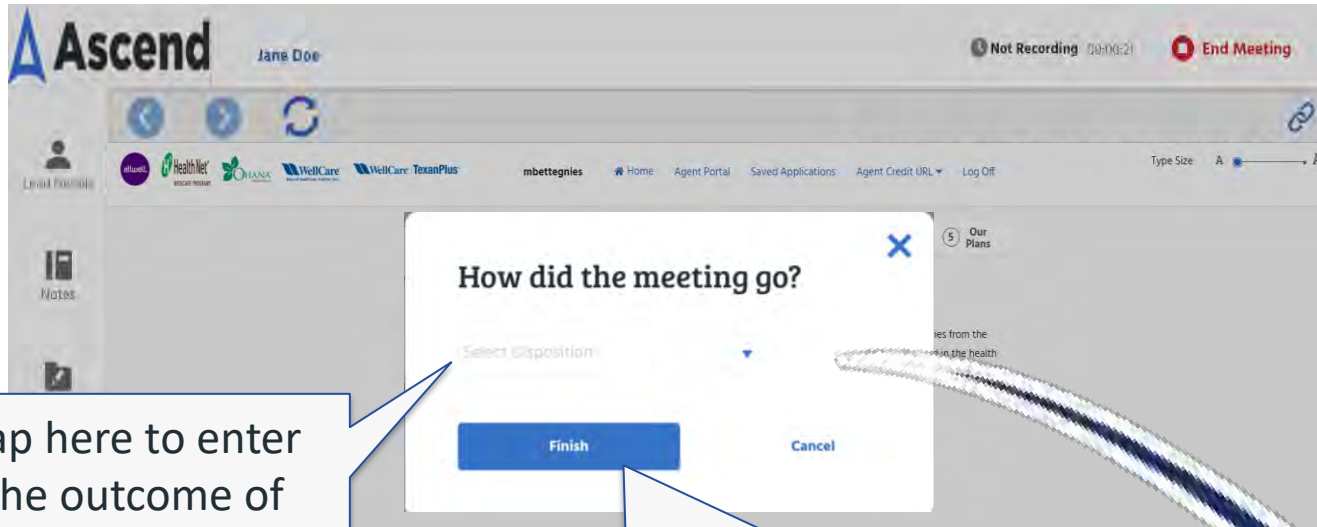
After selecting Decline, a popup box will appear verifying your selection. Click 'OK' to decline to VBE process or click 'Cancel' to return.



**END MEETING**



# End the Meeting in AQE

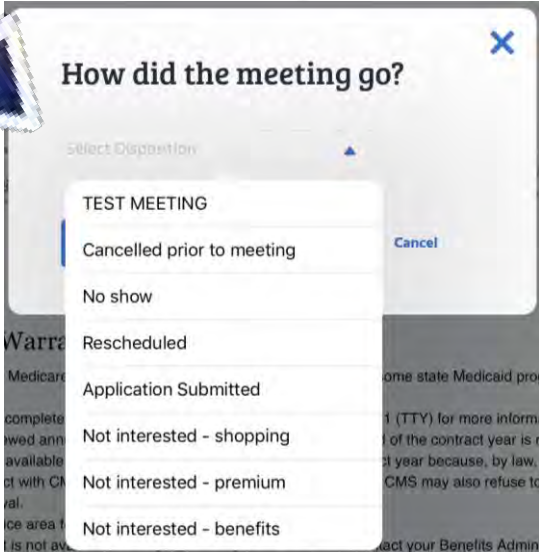


Click 'End Meeting' in the top right corner of the screen to conclude the meeting

Tap here to enter the outcome of your meeting

Once you have selected the best disposition, tap 'Finish' to end the meeting and the recording

A drop-down box will then appear. Select the *most* appropriate meeting disposition.





**QUICK QUOTES**

# Send Quote (Quick Quote)



Health Profile | ZIP Code | My Drugs | My Doctor | 4 Our Plans

## 2020 Medicare Plans

Below are the plans that are available in ZIP Code 90015 in Los Angeles County, California

ZIP Code: 90015 **Update**

**Medicare Advantage** | Prescription Drug Plan

**WellCare Freedom (HMO D-SNP)**  
SHAUNTELLE BONMAN  
\$0<sup>00</sup>/month

**Plan Covers**

- ✗ Dental
- ✓ Vision
- ✓ Hearing
- ✓ Rx

**In-Network Copay**

- Primary Care Physician: \$0.00
- Emergency Room: \$120.00
- Specialist: \$0.00
- Maximum Out-of-Pocket: \$2,500 Annual In-Network.

**WellCare**  
Beyond Healthcare. A Better You.

**Apply Now** | **View Details**

On the Quotes page, select 'Send Quote'. A pop-up will appear. Fill out the beneficiary information, select the plan(s) to send, and click 'Send'. To send only an application, check the 'Application Only' box.

## Send Quote

**Beneficiary First Name** •

**Beneficiary Last Name** •

**Email Addresses (maximum of two)** •

Enter up to two emails, separated with a semi-colon (;)

**Beneficiary Phone** •

Application Only - Select 1 Plan

Text Verification Code - Select 1+ Plans

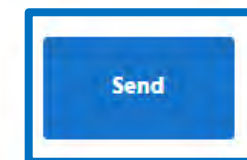
Email Verification Code - Select 1+ Plans

⌵ Medicare Advantage Centene 0 selected

⌵ Medicare Advantage 0 selected

⌵ Prescription Drug 0 selected

Add a custom message





**SEND COMPLETED APPLICATIONS  
FOR BENEFICIARY APPROVAL**

# Click 'Apply Now' to Begin Application



Navigate to the Medicare Plans or progress through the Assisted Shopping tools.

**Ascend** Jane Doe Not Recording 00:00:21 End Meeting

Lead Details Health Profile ZIP Code My Drugs My Doctor 4 Our Plans

Notes Resources

## 2020 Medicare Plans

Send Quote List Compare

Below are the plans that are available in ZIP Code 90015 in Los Angeles County, California:

ZIP Code:  Update

**Medicare Advantage** **Prescription Drug Plan**

### WellCare Freedom (HMO D-SNP)

SHAUNTELLE BONMAN \$0<sup>00</sup>/month

**Plan Covers**

- ✗ Dental
- ✓ Vision
- ✓ Hearing
- ✓ Rx

**In-Network Copay**

Primary Care Physician:	\$0.00
Emergency Room:	\$120.00
Specialist:	\$0.00
Maximum Out-of-Pocket:	\$2,500 Annual In-Network.

**WellCare**  
Beyond Healthcare. A Better You.

Apply Now View Details

# Fill in Application



Fill in as much prospect information as you can

The screenshot shows a web application interface for 'Ascend' with a user named 'Jane Doe'. The interface includes a top navigation bar with 'Not Recording' and 'End Meeting' buttons. A sidebar on the left contains icons for 'Lead Details', 'Notes', and 'Resources'. The main content area is titled 'Other living situations and health services' and features a progress indicator with steps: 'Medicare Details', 'PCP', 'Insurance Info', 'Medicare Status', and 'Other Details' (the current step). A 'Back to Shopping' button and a price of '\$0.00/month' are also visible. The form contains several sections:

- Important Questions - Please answer the following questions**
  - Do you have end-stage renal disease (ESRD)?\***  
 Yes  No  
If you have had a successful kidney transplant and/or you don't need regular dialysis any more, you will need to send us a note or records from your doctor showing you have had a successful kidney transplant or you don't need dialysis, otherwise we may need to contact you to obtain additional information.
  - Will you have other prescription drug coverage in addition to Wellcare/Ohana/Wellcare TexanPlus Healthcare Plans?\***  
 Yes  No  
Some individuals may have other drug coverage, including other private insurance, TRICARE, Federal employee health benefits coverage, VA benefits, or State pharmaceutical assistance programs.
  - Are you a resident in a long-term care facility, such as a nursing home?\***  
 Yes  No
  - Are you enrolled in your State Medicaid program?\***  
 Yes  No
  - Do you or your spouse work?\***  
 Yes  No
- Document Preferences**

Please check the box below if you would prefer us to send you information in a language other than English or in an accessible format.

  - Spanish
  - Chinese
  - Korean
  - Vietnamese
  - Tagalog
  - Large Print

Please contact WellCare/Ohana/Easy Choice/WellCare TexanPlus if you need information in an accessible format or language other than what is listed above.

At the bottom of the form, there are two blue buttons: 'Back' and 'Next'. Below these are two white buttons: 'Save' and 'Send for signature'.



# Click "Send for Signature"



Once information is filled out, click 'Send for signature' found at the bottom of each section.

The screenshot shows the Ascend web application interface. At the top, the Ascend logo and user name 'Jane Doe' are visible. Below the logo, there are navigation icons for 'Lead Details', 'Notes', and 'Resources'. The main content area is titled 'Other living situations and health services' and contains two sections: 'Important Questions - Please answer the following questions' and 'Document Preferences'. The 'Important Questions' section includes five questions with radio button options for 'Yes' and 'No'. The 'Document Preferences' section includes a checkbox for 'Please check the box below if you would prefer us to send you information in a language other than English or in an accessible format.' and a list of languages: Spanish, Chinese, Korean, Vietnamese, Tagalog, and Large Print. At the bottom of the form, there are four buttons: 'Back', 'Next', 'Save', and 'Send for signature'. A large blue arrow points to the 'Send for signature' button.

**Note:** Clicking 'Send for signature' from any page will send all the information captured on ALL pages

# Complete Required Fields & Click Send



✕

### Send Partial Application for Signature

---

<b>Beneficiary First Name</b> •	<b>Beneficiary Last Name</b> •
<input type="text" value="Harper"/>	<input type="text" value="Test"/>
<b>Email Addresses (maximum of two)</b> •	<b>Beneficiary Phone</b> •
<input type="text" value="Email Addresses (maximum of two)"/>	<input type="text" value="Beneficiary Phone"/>

- Text Verification Code - Select 1+ Plans
- Email Verification Code - Select 1+ Plans
- Add a custom message

**Send** ←

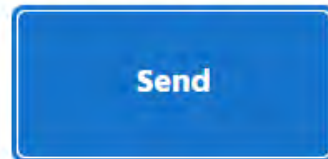
Complete the required fields.  
You can add a custom message.



# Immediate Verification



Email sent. The verification code is 1587909260. The code was sent to the beneficiary's phone.



You will immediately receive verification that the code was sent and is provided on the screen.

# Emails Received by Prospect with Verification Code



## Email #1

Madisson Bettegnies wants to share health insurance options.

Centene - Managed Health Services - IN <donotreply@quotes.isf.io>  
To: Madison Bettegnies

Reply Reply All Forward

Wed 6/3/2020 10:39 AM

Greetings Harper Test,

This email from Centene - Managed Health Services - Indiana contains an application that needs your signature. Please click on the button below to resume the application.

**CLICK TO RESUME**

Madisson Bettegnies

Centene - Managed Health Services - Indiana

Call: [234-552-3452](tel:234-552-3452)

[mbettegnies@bloominsuranceagency.com](mailto:mbettegnies@bloominsuranceagency.com)

You received this email upon request.

*This email message, including any attachments, is for the sole use of the intended recipient, and may contain material that is privileged or confidential and legally protected from disclosure. If you are not the intended recipient or have received this message in error, you are not authorized to copy, distribute, or otherwise use this message or its attachments. Please notify the sender immediately by return email and permanently delete this message and any attachments.*

## Email #2

Madisson Bettegnies wants to share health insurance options.

Centene - Managed Health Services - IN <donotreply@quotes.isf.io>  
To: Madison Bettegnies

Reply Reply All Forward

10:39 AM

This is the most recent version, but you made changes to another copy. Click here to see the other versions.

You've been sent an email containing a link. Following the link, you'll be asked to input this Verification Code:

109492096

# Prospect Steps – Enter Verification Code



Type Size | A A

## Verification

Verification Code

The prospect will enter in the verification code they received via text or email.

# Prospect Steps – Review Entered Information



Contact Info | 1 About You | 2 Your Address | 3 Emergency Contact

[Back to Shopping](#) \$ 0<sup>00</sup>/month

## Tell us about yourself

**Personal Information**

Prefix:

First Name:  Middle Initial:

Last Name:  Gender:  Male  Female

Your Birthday:  Email:

Phone:  Alternate Phone:

The prospect should review all entered information and make corrections if necessary.

# Prospect Steps – Click Apply Now



Review & Purchase 1 Review

## Review

\$ 0<sup>00</sup> /month

**Apply Now**

- ✓ Step 1: Health Profile
- ✓ Step 2: Contact Info
- ✓ Step 3: Medicare Details
- ✓ Step 4: Health Questions

**Authorization** Signature of Applicant: *Harper Test* [Edit](#)  
Signature Date: *06/12/2020*  
I am the person listed on this enrollment form or  
I am simply helping to complete this enrollment  
form. *SelfEnroll*

**Payment** Payment Method: *Bill* [Edit](#)

By clicking the "Apply Now" button below you are confirming that everything in this application is true and correct to the best of your knowledge. Anyone giving false or misleading statements about a material fact in this electronic application, or causes someone else to do so, may face penalties under the law. By clicking "Apply Now" you are also electronically signing your completed application and submitting this to the plan. You will no longer be able to change your information once you submit. Once you submit your enrollment application you will be enrolled in this plan (if approved by CMS) and you will receive notice of acceptance or denial following submission of the enrollment to CMS.



Once complete and reviewed,  
the prospect will click 'Apply  
Now'

# Confirmation Page – Consumer VBE



The prospect will be taken to the confirmation page where they can:

- Email their confirmation number
- Print their application summary
- Initiate VBE

The screenshot shows a confirmation page for Allwell Medicare (HMO) Value-Based Enrollment. The page is divided into two main sections: a white confirmation area and a blue sidebar with options.

**Confirmation Area (White):**

- Header: "Congratulations! Your Allwell Medicare (HMO) application has been successfully submitted."
- Text: "Please keep this Confirmation Number for your records: 1736"
- Buttons: "Email Confirmation" (with envelope icon) and "Print Application" (with printer icon). Both buttons include instructions: "Click here to have your confirmation number emailed to you" and "Click here to print this page with your Confirmation Number".
- Note: "NOTE: We will not keep the email address entered on file. It will be used for the sole purpose of sending an enrollment confirmation receipt."
- Text: "If you have any questions about your pending application, please call Allwell at the number listed below and have your confirmation number ready."
- Contact Info: "Call for more information: Phone: 1-855-766-1541 TTY: 711 Monday thru Friday: 9AM – 5PM All Time Zones (excluding holidays)"

**Blue Sidebar (Value-Based Enrollment):**

- Logo: "Value-Based Enrollment" with a stylized 'V'.
- Text: "Start Your Value Based Enrollment Now!"
- Text: "Select your preferred language for the call:" with radio buttons for "English" and "Spanish".
- Options (each with a chevron icon on the left):
  - Connect Me Now:** "Have a Value Based Enrollment Wellness Advocate call you now" (with a person and phone icon).
  - Schedule a Callback:** "Schedule a date and time for a Value Based Enrollment Wellness Advocate to call you back" (with a calendar icon).
  - Decline:** "Decline the Value Based Enrollment program" (with an 'X' icon).



**AGENT PORTAL**

# Agent Portal



mbettegnies

Home

Agent Portal

Saved Applications

Agent Credit URL

Log Off

Type Size

A



A

## Tracking

Enrollments

Value Based Enrollments

Quick Quotes

Search for an enrollee



Select Fields

Select

Name ▲ Address ◀ Plan ◀ Plan Year ◀ Date ◀ Premium ◀ Confirmation # ◀ VBI

Harper Test	240 Venice Boulevard, Los Angeles, CA, 90015	WellCare Best (HMO)	2020	06/05/2020	\$0.00	405	
-------------	--	---------------------	------	------------	--------	-----	--

Toggle to the VBE tab to view information regarding past VBEs

Toggle to the Quick Quotes tab to view information regarding sent Quick Quotes

On the Enrollments tab, you can view the status of past applications



# Agent Credit URL/Personal URLs



- Each Agent will have a Personal URL (PURL) to use to connect prospects with the online enrollment tool if they are not doing a face to face meeting with Ascend
- The PURL can be found in the Agent Portal and accessed with your same Ascend credentials
  - Visit the portal
  - Log in with your provided Ascend Credentials
  - Click on “View Enrollments”
  - PURL is always on the top of the page
- Your PURL is unique to you and is created on your first login to the agent portal
- The PURL is attached to your writing numbers so that you will get credited for the sale when an enrollment is made through the tool
- The Ascend Quote & Enrollment Tool will look the same for the agent as it would in AMA; however, lead information and other items like Scope of Appointment will not be merged into the application



mbettegnies

Home

Agent Portal

Saved Applications

Agent Credit URL

Log Off

Type Size

A



A

Health Profile

1

ZIP Code

2

Blue Button

## Explore Plans

Enter your ZIP Code below to find Medicare plans and review rates.

Your ZIP Code

Continue

### Agent Credit URL

Your URL can be shared with a beneficiary, enabling them to submit an online application which will be credited to you.

<https://wellcare.uat.isf.io/2020?AgentCred>

Copy URL



**SAVED APPLICATIONS**

# Saved Applications



mbettegnies

[Home](#)

[Agent Portal](#)

[Saved Applications](#)

[Agent Credit URL](#) ▾

[Log Off](#)

Type Size

A



A

## Applications In Progress

Enrollee	Address	Plan	Plan Year	Last Edit	Actions
Harper Jo	CA 90015	WellCare Best (HMO)	2020	06/12/2020 12:07:18 PM	<a href="#">Edit</a>   <a href="#">Delete</a>

You can edit or delete the application here

On this screen, you can view saved enrollments.

**Note:** Saved Applications will only last for 7 days.

# Steps for Completing a Saved Application





# OFFLINE APPLICATIONS

# Selecting a Lead



- From the Home screen, select the lead you would like to submit an application for under the New Leads section.

**Ascend** Madison Bettegnies  
Unavailable Not Accepting Calls

**Welcome Madison**

**Offline**  
Your Internet connection appears to be down, some features may be unavailable while offline. Click here to Start a Meeting.

**What would you like to do today?**

- 2020 RATE Telephonic Enrollment Script - English
- Agent Portal - AR
- Agent Portal - CA
- Agent Portal - FL
- Agent Portal - GA
- Agent Portal - IL
- Agent Portal - IN
- Agent Portal - KS
- Agent Portal - LA
- Agent Portal - MD

**New Leads**

Name	Date Modified	Source	Status	County	Zip Code
Tester, Howard	Jun 08, 2020	Self Generated	-	Los Angeles	90015

[View All Leads](#)

**Note:** the top of your screen will display an offline message when not connected to the internet.

# Start a Meeting



- After you have selected the lead, select 'Start a Meeting' to begin the meeting from the Leads screen.

The screenshot displays the Ascend CRM interface for a lead named 'Tester, Howard'. The interface includes a sidebar with navigation icons for Home, Leads, Appointments, Recordings, Resources, and Help. The main content area shows the lead's details, including the date 'Jun 08, 2020' and 'Self Generated'. A blue button labeled 'Start a Meeting' is highlighted with a red box. Below this, there are sections for 'Appointments' and 'Past Meetings', both of which are currently empty. At the bottom, there is a section for 'Offline Enrollments', also empty.

**Ascend** Madison Bettegnes  
Unavailable Not Accepting Calls

**Tester, Howard**

Jun 08, 2020 Self Generated

**Start a Meeting**

**Appointments**

Meeting Type	Date	Time
There are no appointments for this lead. Any appointments will be displayed here.		

**Past Meetings**

Date	Time	Held By	Status
No Meetings on record for this Lead. Any held meetings with this lead will show here.			

**Offline Enrollments**

Meeting Time	Status	ID
No Offline Enrollments pending for this Lead. Any Offline Enrollments created through Ascend for this lead will show here.		



# Selecting a SOA



- If you have a previous Scope of Appointment (SOA), it will be listed on the next screen
- Simply click on the SOA you want to use then select 'Start a Meeting'
  - If no SOA is listed, you will need to ensure you complete a proper scope before starting the meeting

**Do you have a Scope of Appointment?**

Date	Time	Form Type	Status
Sep 27, 2018	-	Electronic	Accepted

Enter Scope of Appointment ID (Optional)

**Start Meeting**      Cancel Meeting

You can also search for SOAs by entering in the SOA Appointment ID

# Accepting the Disclaimer



- Once the meeting has started, you will be asked to acknowledge that the meeting is being recorded

**Recording Disclaimer**

Agent: Ascend Mobile Application (AMA) is intended for appointments where the beneficiary or their authorized representative is physically present with the sales agent. Telephonic enrollments require access to AMA's Remote Agent Telephonic Enrollment (RATE) feature on a compatible iOS device and may only occur following an in-person appointment. RATE is currently not available in all sales regions.

Beneficiary: I acknowledge this meeting will be recorded and used, in addition to my application, as proof of enrollment. Do you consent to the recording?

# Entering the Zip Code



- The enrollment application will already list the lead you selected earlier in the process
- To proceed, you must type in the zip code that the beneficiary lives in
- Once entered, click 'Continue' to be taken to the next screen

**Let's get started!**

This health plan will cover: **Howard Tester**

Your current zip code is

**Continue**

# Selecting an Enrollment Form



- From the list, click on the enrollment form you would like to use

The screenshot shows the Ascend interface. At the top left is the Ascend logo and the name "Howard Tester". On the top right, there are controls for "Not Recording" (with a timer at 00:00:11) and "End Meeting". The main content area has a title "Select an Enrollment form for Howard Tester" and a dropdown menu that is currently open, showing the option "2020 CCP Enrollment Form". On the left side of the interface, there are icons for "Lead Details" and a video camera icon.

# Completing and Submitting the Application



- Scroll through the enrollment application and fill in the missing information minding the \* symbol indicating required fields. Once all the required fields are completed, click 'Submit' at the end of the application to submit it.

**Ascend** Howard Tester Not Recording 00:00:37 End Meeting

### Enrollment Form for Howard Tester

[Go Back](#)

**Personal Information**  
Users typically take 18 to 25 minutes to complete enrollment. To speed up the process, please have your Medicare card handy.

First Name:\*  Middle Initial:

Last Name:\*  Gender:\*

Birthdate:\*  Phone:\*

Email Address:

**Medical Insurance Information**  
Using the information on your Medicare card, please complete the information below.  
You must have Medicare Part A and Part B to join a Medicare Advantage Plan

Medicare Number:\*

Hospital Part A Date:\*

Medical Part B Date:\*

**Permanent Residence Address (P.O. Box is Not Allowed)**

Address 1:\*  Address 2:

City:\*  State:\*

Zip:\*  County:\*

**Mailing Address (Only If Different Than Permanent Residence Address)**

Mailing Address 1:

Mailing City:  Mailing Address 2:

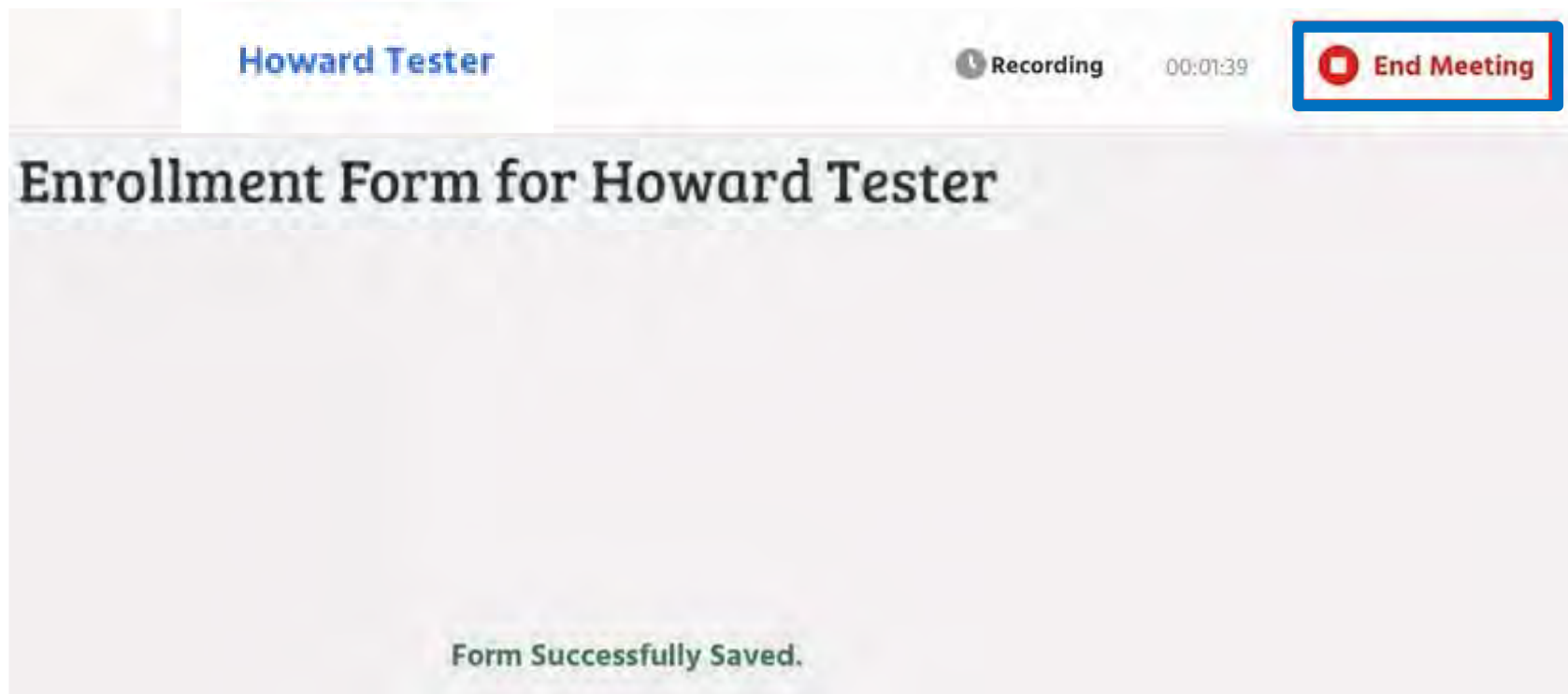
Mailing State:

**Submit**

# Ending the Meeting



- Once the form has been submitted, a confirmation page will appear saying the form was successfully saved
- Click 'End Meeting' in the upper right-hand corner to end the meeting



# Dispositioning the Meeting



- From the drop-down list, select the disposition that best represents the outcome of your meeting
- Click 'Finish' once done

The screenshot shows a dialog box titled "How did the meeting go?". At the top right is a blue "X" icon. Below the title is a text input field containing "Select Disposition" and a small downward-pointing triangle. At the bottom left is a blue button labeled "Finish" with a red and blue border. At the bottom right is a "Cancel" button.

# Returning Online



- While you are disconnected from the internet, it will say your enrollment is pending
  - You can find this status on your lead's profile under the Offline Enrollments section in AMA

Meeting Time	Status	ID
Sep 27, 2018 01:14:05 PM	Pending	

- Once you regain internet access, your application will automatically be delivered electronically to the carrier's enrollment department for processing
- Your offline enrollment status will be updated once this is complete
- The time stamp will reflect the time you connect to internet



# Confirming Lead Status



Once the offline application has been submitted,  
return to the 'Leads' section of AMA



Ensure that the 'Lead Status' has been updated  
accordingly to represent the application  
submission



**SANDBOX MODE**

# Signing In



**Sandbox Mode**  
You have enabled Sandbox mode. While Sandbox mode is enabled you will be able to use the application for testing or training purposes. Any data created, modified, or deleted during Sandbox mode will not be saved. You will not be able to recover any information entered while in Sandbox mode.

OK

Sandbox Mode

Forgot Password?

Help

Version: 2020.103.02

To enter Sandbox mode, toggle the button for Sandbox mode **before** signing in.

Read the pop-up message then click 'OK' to continue.

# Home Screen



Once logged in, you will see a banner across the top in red lettering with yellow highlight.

The screenshot shows the Ascend Home Screen. At the top, there is a yellow banner with the text "Ascend in Sandbox mode. Changes made will not be saved." and a red "Exit Sandbox" button. To the right of the banner, the user's name "Madison Bettegnies" is displayed along with status indicators "Unavailable" and "Not Accepting Calls". Below the banner, the main content area is titled "Welcome Madison". A red-bordered box highlights a "New Action Items!" notification with a "View Notifications" link. Below this, two other notifications are visible: "You have a new lead assigned to you!" and "You have a new Home Visit assigned to you!". The bottom section is titled "What would you like to do today?" and contains a grid of buttons for various actions, including "2020 RATE Telephonic Enrollment Script - English", "Agent Portal" for various states (AR, CA, FL, GA, IL, IN, KS, LA, MO, MS, NM, OH, OR, PA, SC, TX, WI), "Broker Portal", and "Quick Quote" for Florida, Kansas, California, and Georgia.



**SIGNING OUT**

# Sign Out of AMA



The screenshot shows the Ascend user interface. At the top left is the Ascend logo. Below it is a navigation sidebar with icons for Home, Leads, Appointments, Recordings, Resources, and Help. The main content area is titled 'Welcome Madison' and features a grid of tiles under the heading 'What would you like to do today?'. The tiles include '2019 Allwell Sales Presentation', '2019 Health Net Presentation', and various 'Agent Portal' links for states like AR, AZ, FL, GA, LA, MO, OR, PA, SC, and TX. There are also tiles for 'Broker Portal', '2019 OR HN Spanish', 'Add a Resource Tutorial', and 'Switching from Enrollment URLs in Windows and iOS'. On the right side, there is a user profile card for 'Madison Bettegnies' with status 'Unavailable' and 'Accepting Calls'. A dropdown menu is open, showing options like 'My Number: (833) 216-1117', 'Available' (with a toggle switch), 'Accepting Calls' (with a toggle switch), 'Action Items', 'Lead Alerts', 'Messages', 'Change Password', 'My Account', and 'Sign Out'. A callout box points to the 'Sign Out' option with the text 'Click here to Sign Out of AMA'. Another callout box points to the dropdown arrow in the user profile card with the text 'Click the down arrow to bring up the dropdown menu'.

Click the down arrow to bring up the dropdown menu

Click here to Sign Out of AMA



**THANK YOU FOR ATTENDING THE  
TRAINING!**