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

Ascend Will

- **Protect *<u>Your</u>* 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

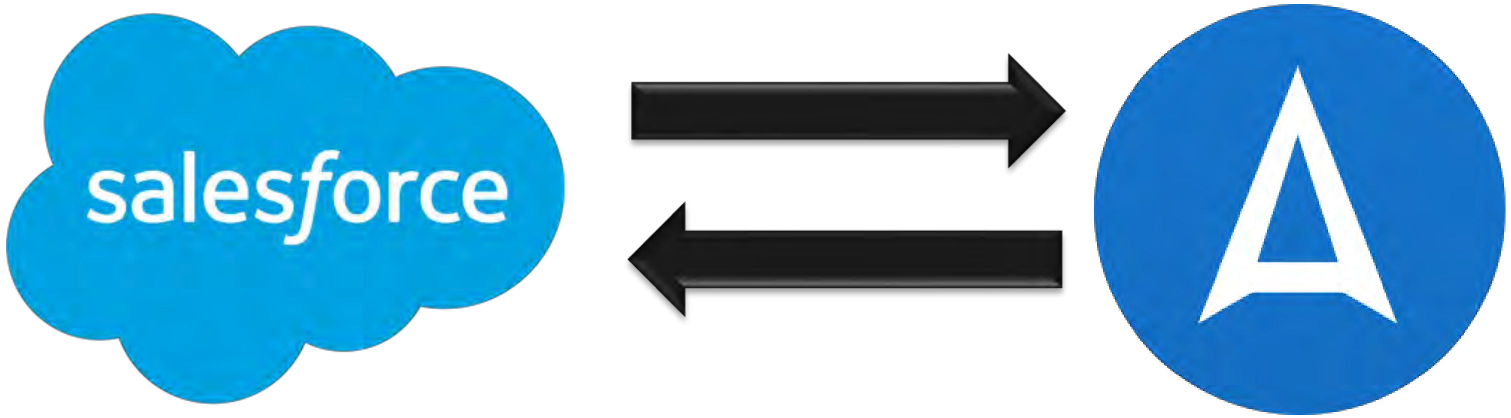
- **Keep you connected with the field and compliant through one simple application**
  - We provide easy access to resources like sales presentations and videos, direct links to plan information, the Broker Portal, and more, all in one place to keep you organized and make compliance adherence simple

- **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

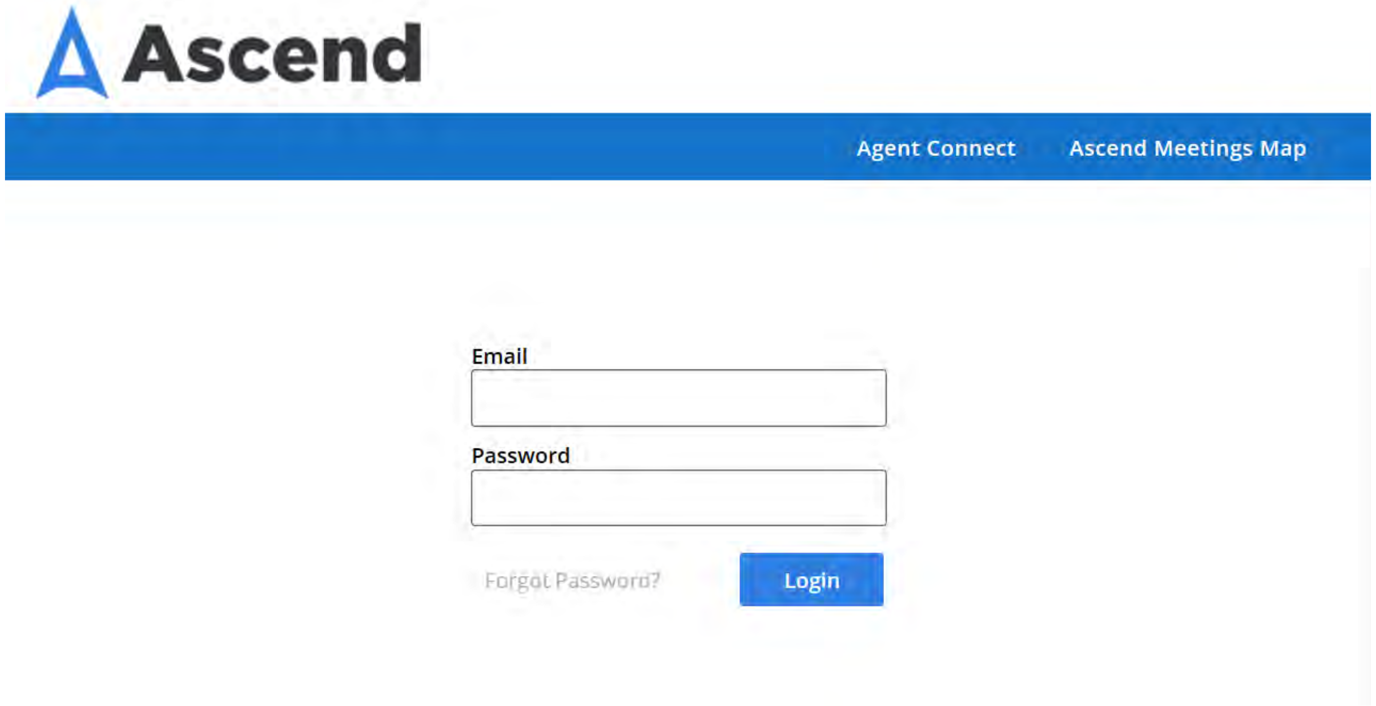
ARM: Ascend Real-Time Manager

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

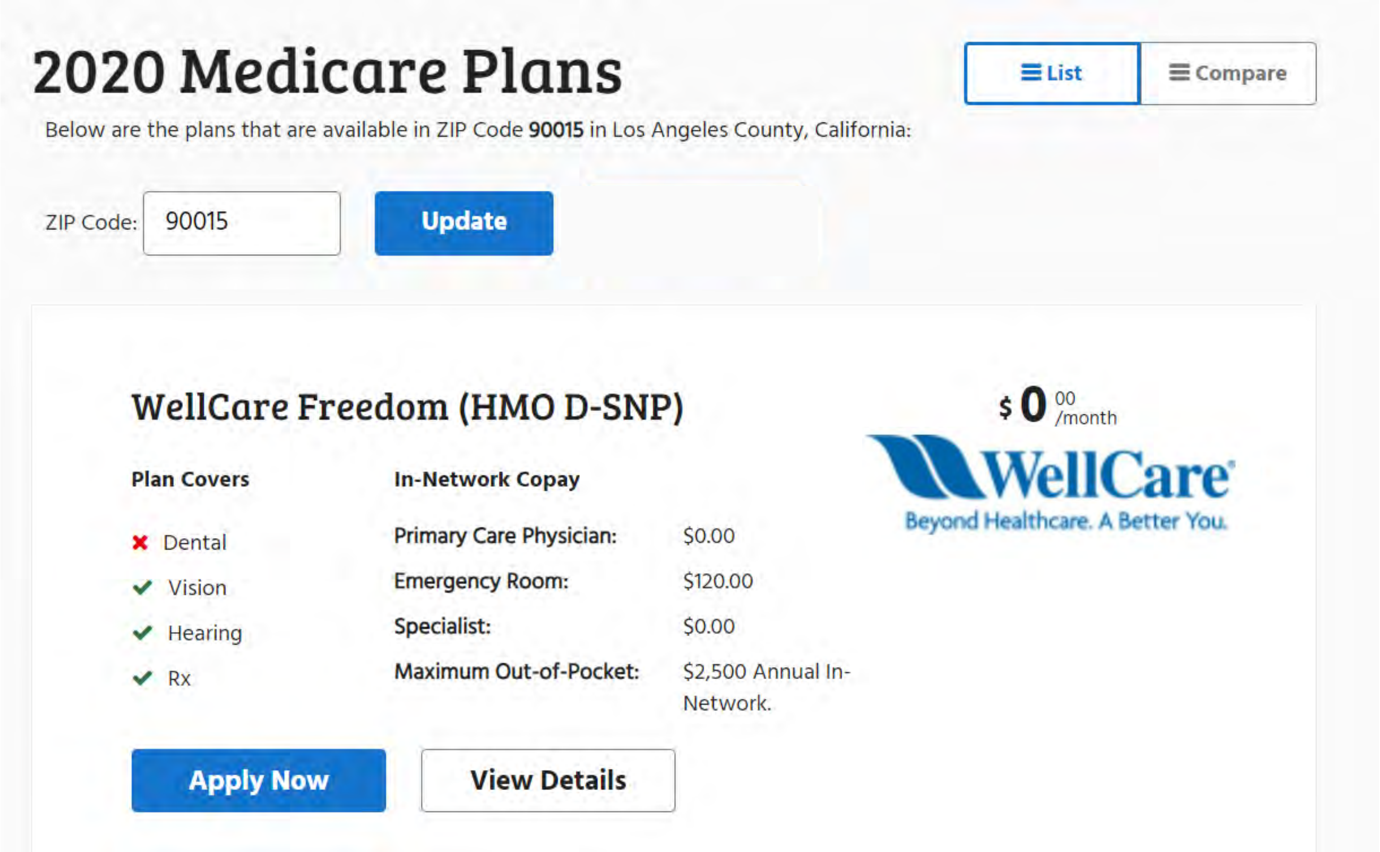


AMA: Ascend Mobile Application

- 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



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."

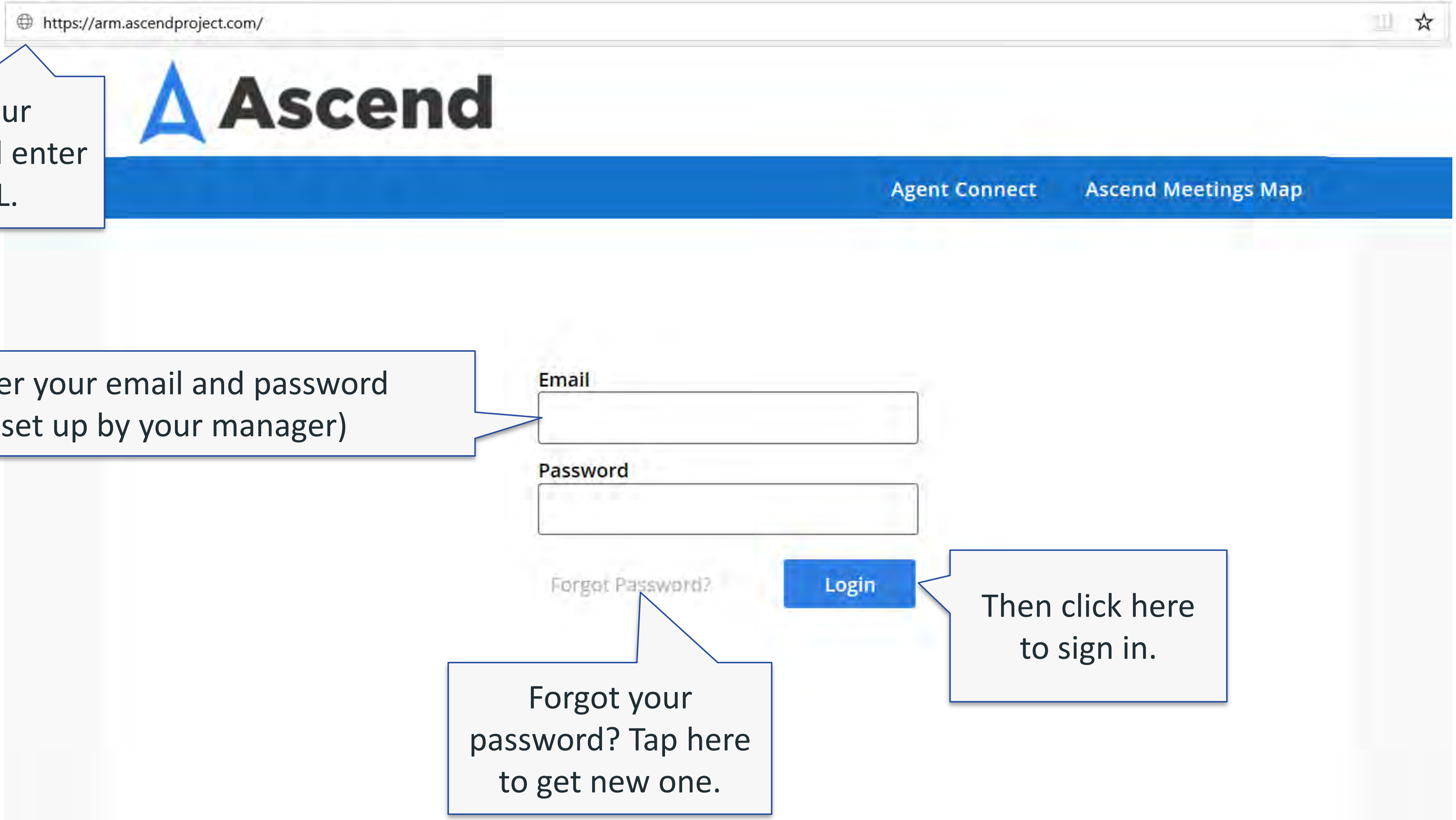
"I have less to carry around, it makes my life much easier. I have much less to worry about compared to when I used paper applications. I used it for all but one application this AEP."

"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



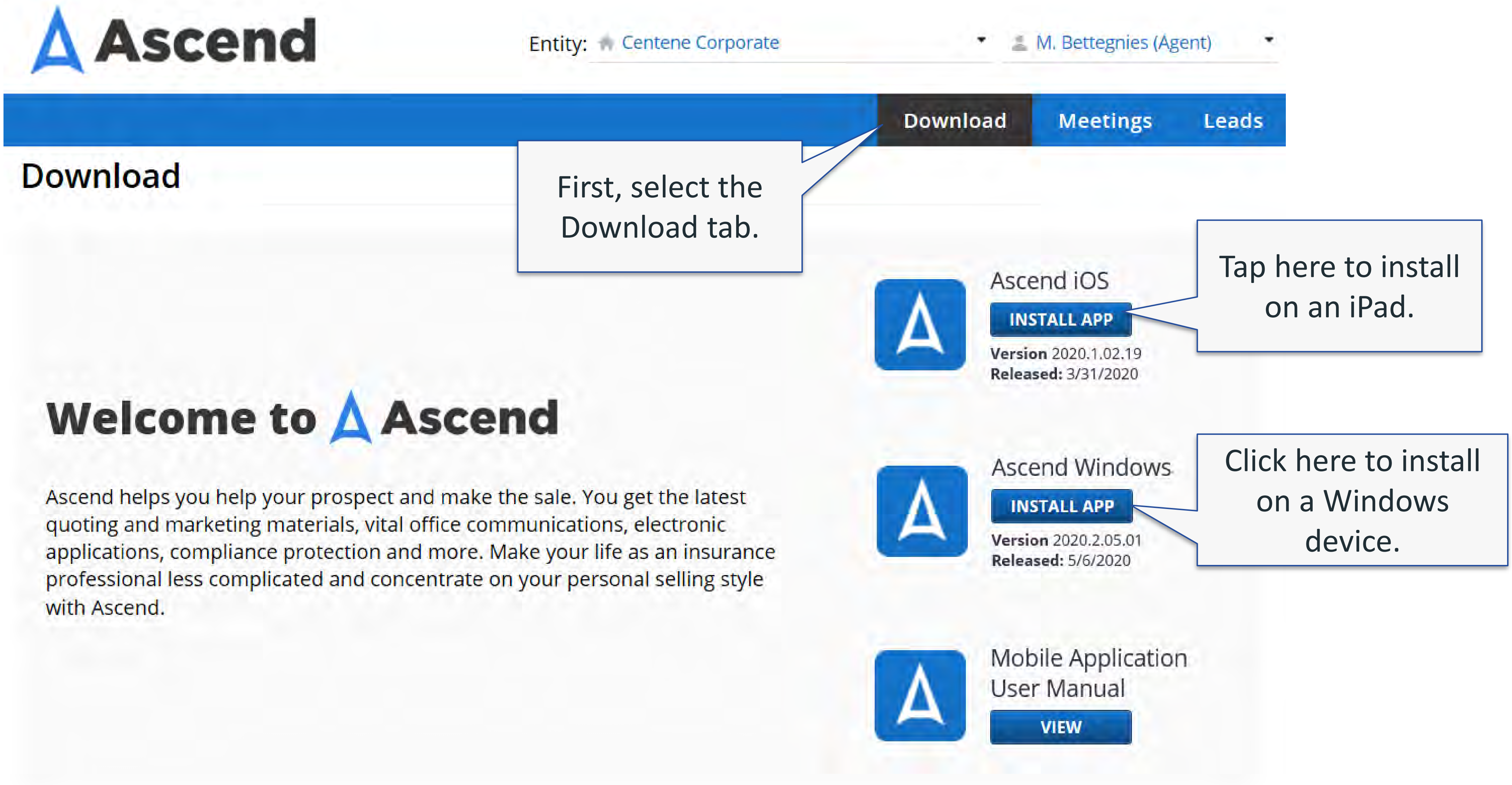
Open your browser and enter this URL.

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

Then click here to sign in.

Forgot your password? Tap here to get new one.

Downloading AMA

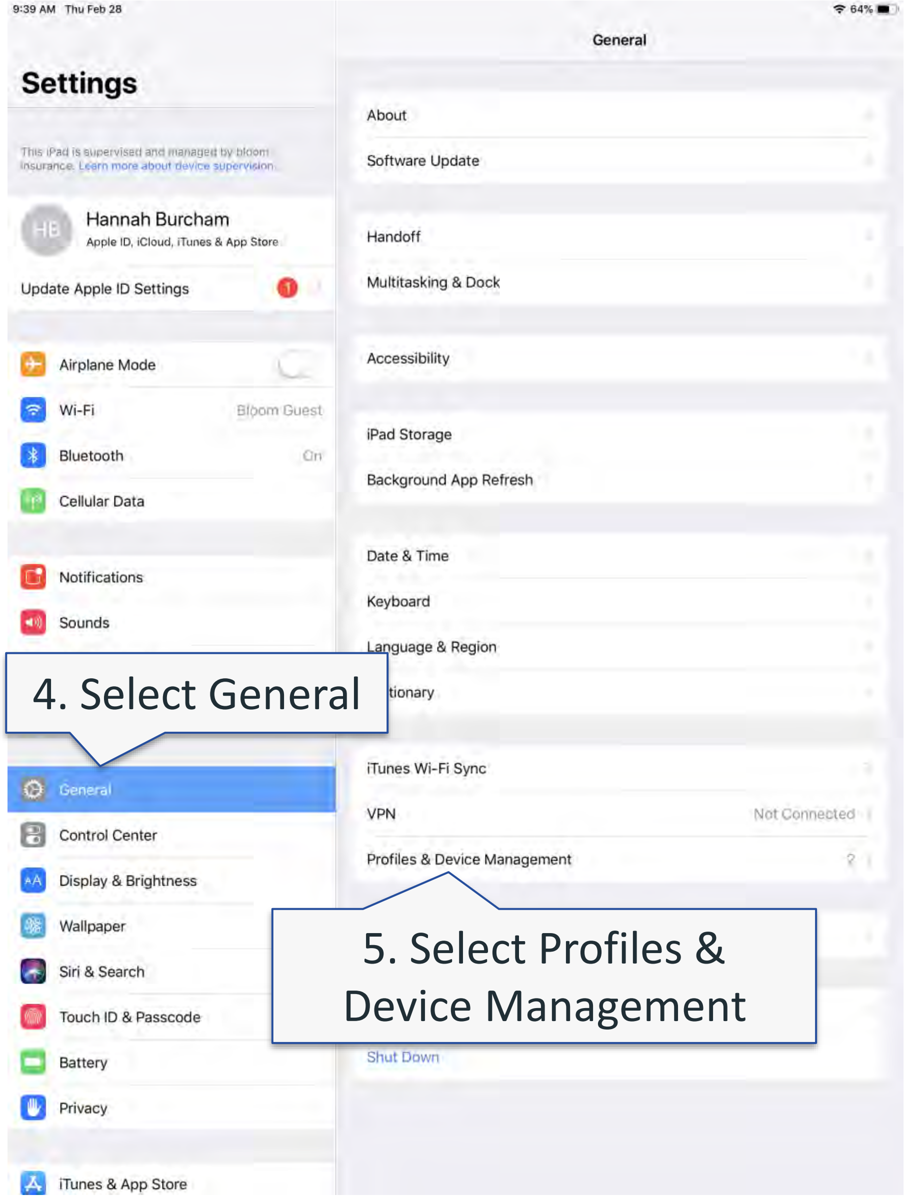


IOS ONLY INSTRUCTIONS

1. Launch the Ascend App

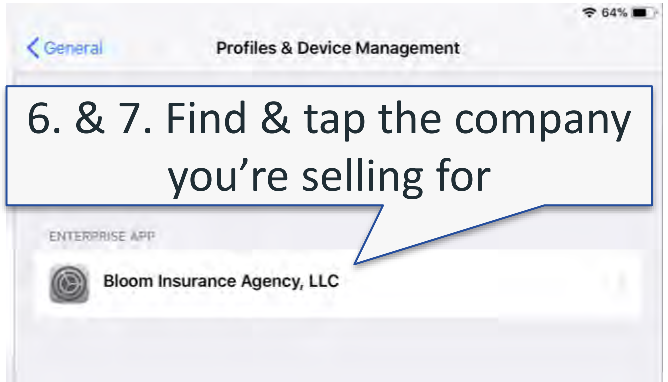
2. Click Cancel

3. Open Settings

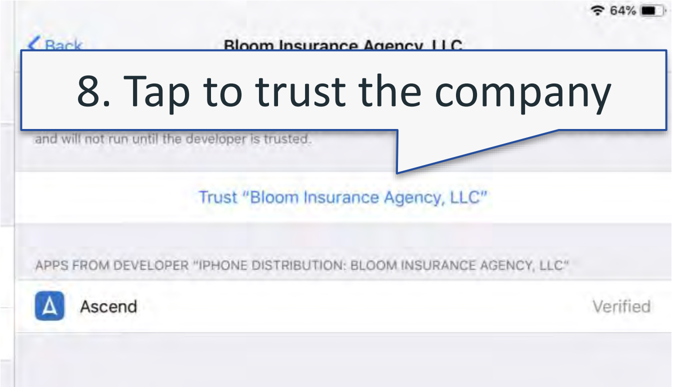


4. Select General

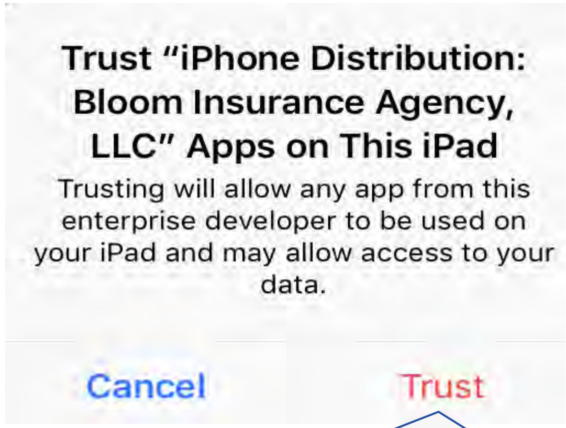
5. Select Profiles & Device Management



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



8. Tap to trust the company



9. Verify that you trust them

10. Launch the Ascend App and start using AMA

ASCEND MOBILE APPLICATION

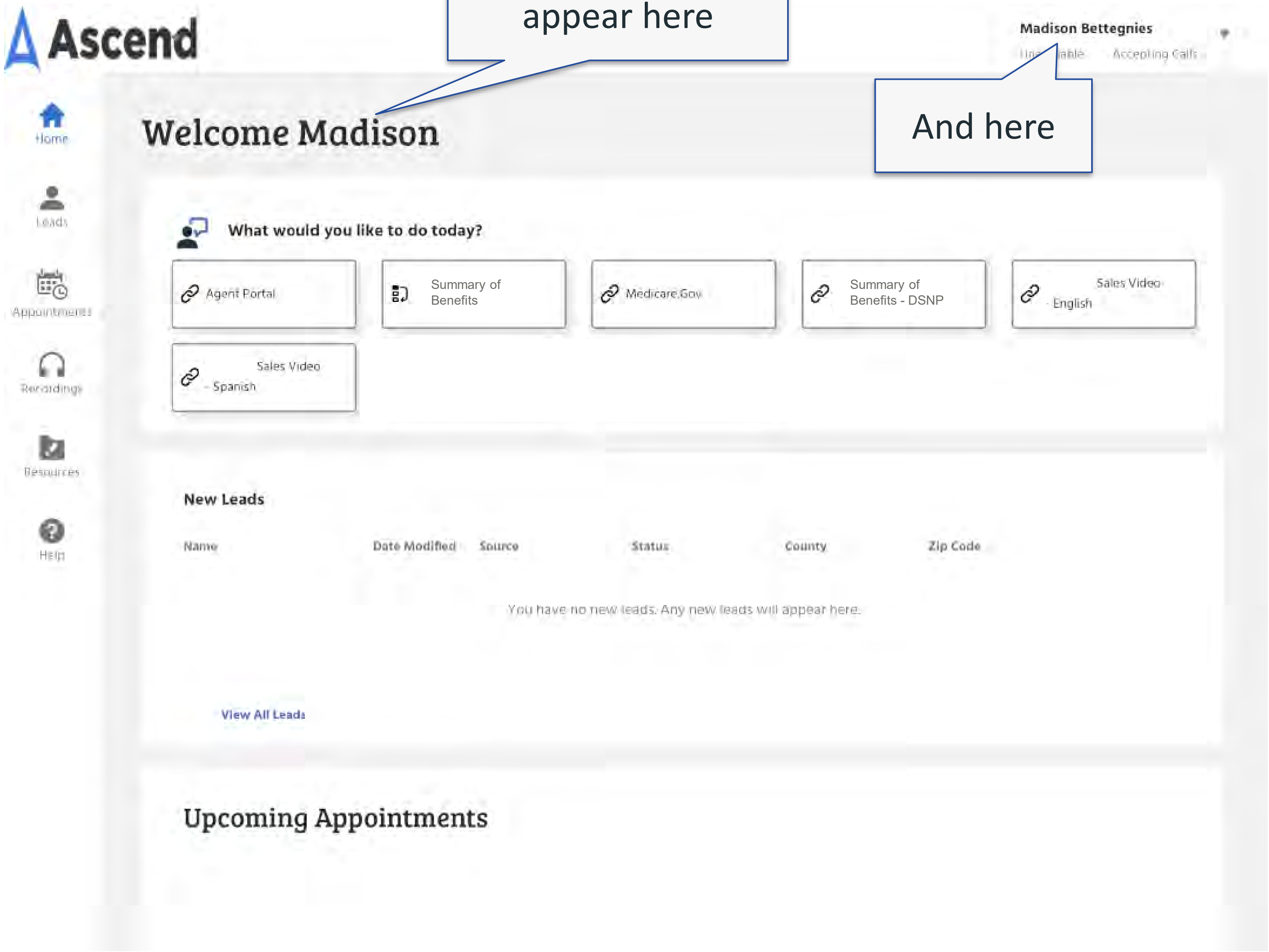
LOGIN & NAVIGATION

Login Screen

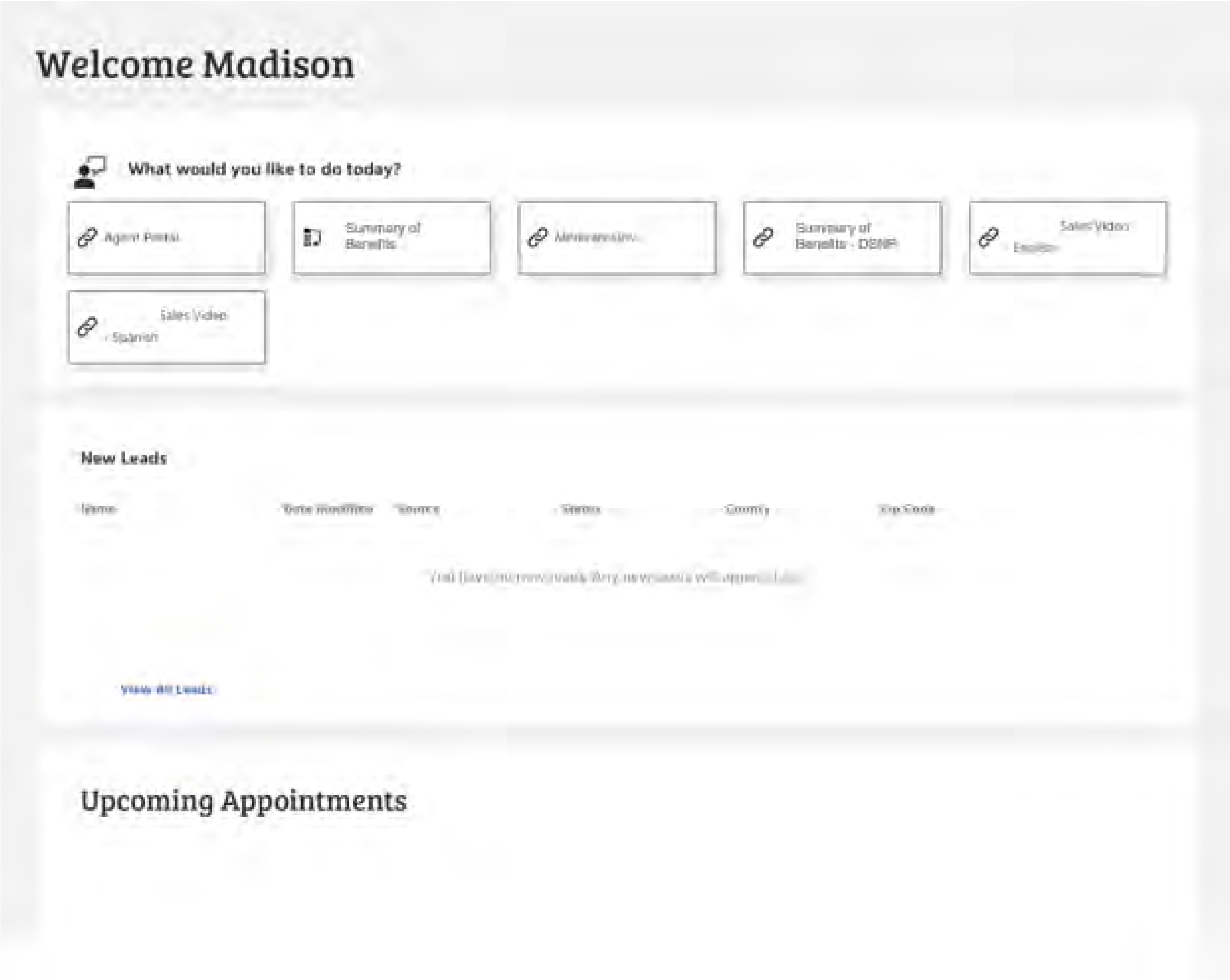
Home Screen

Your name should appear here

And here

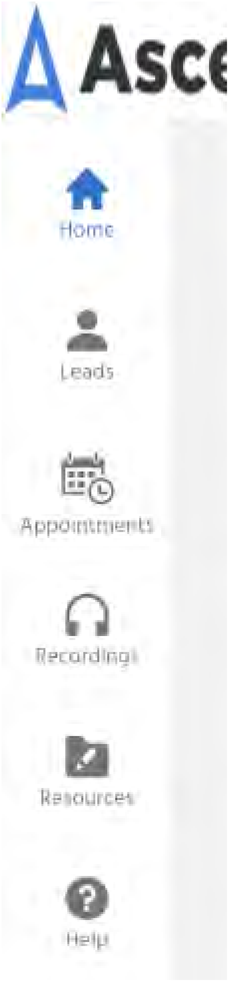


Main Window



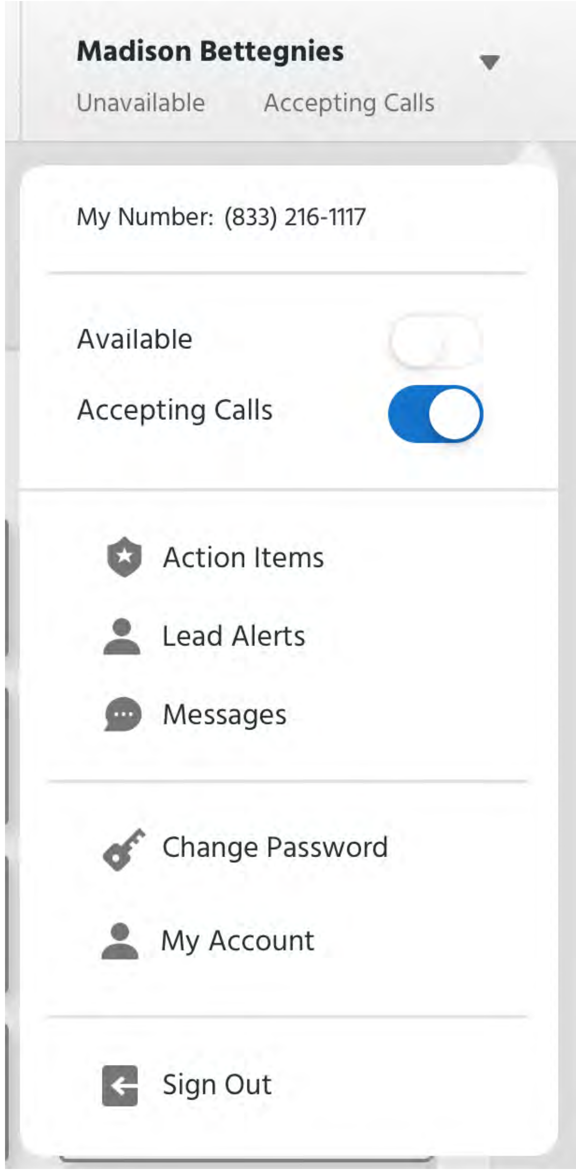
- This makes up the majority of the AMA screen and is what will change when different options are selected from the **Navigation Bar** or **Drop-Down Menu**

Navigation Bar



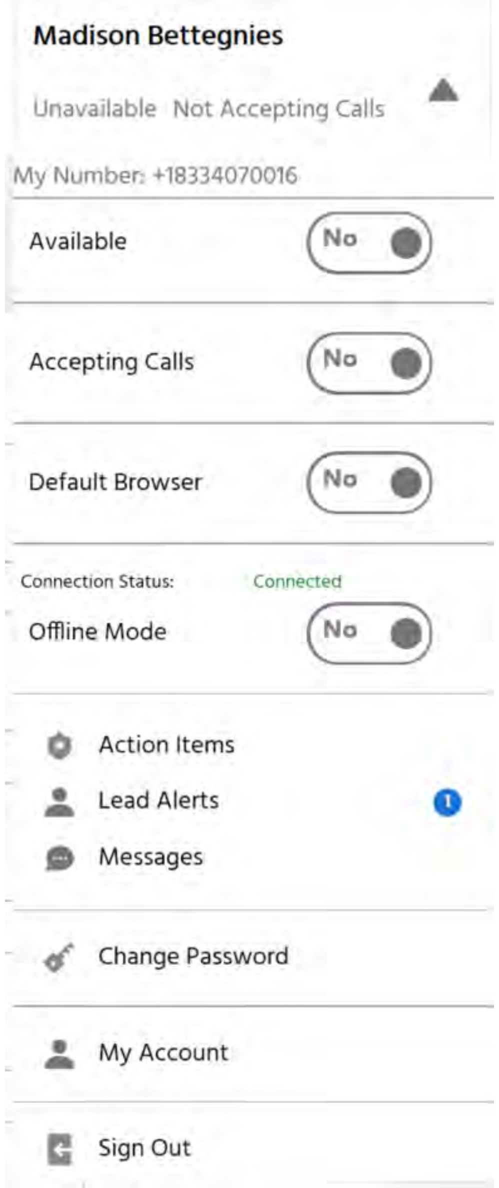
- The Navigation Bar will be visible from all sections of AMA
  - It consists of:
    - Home Page/ Welcome Page
    - Leads – Your Book of Business
    - Appointments – View Seminars and Home Visits assigned to you
    - Recordings – View and upload recordings
    - Resources – Available during applications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

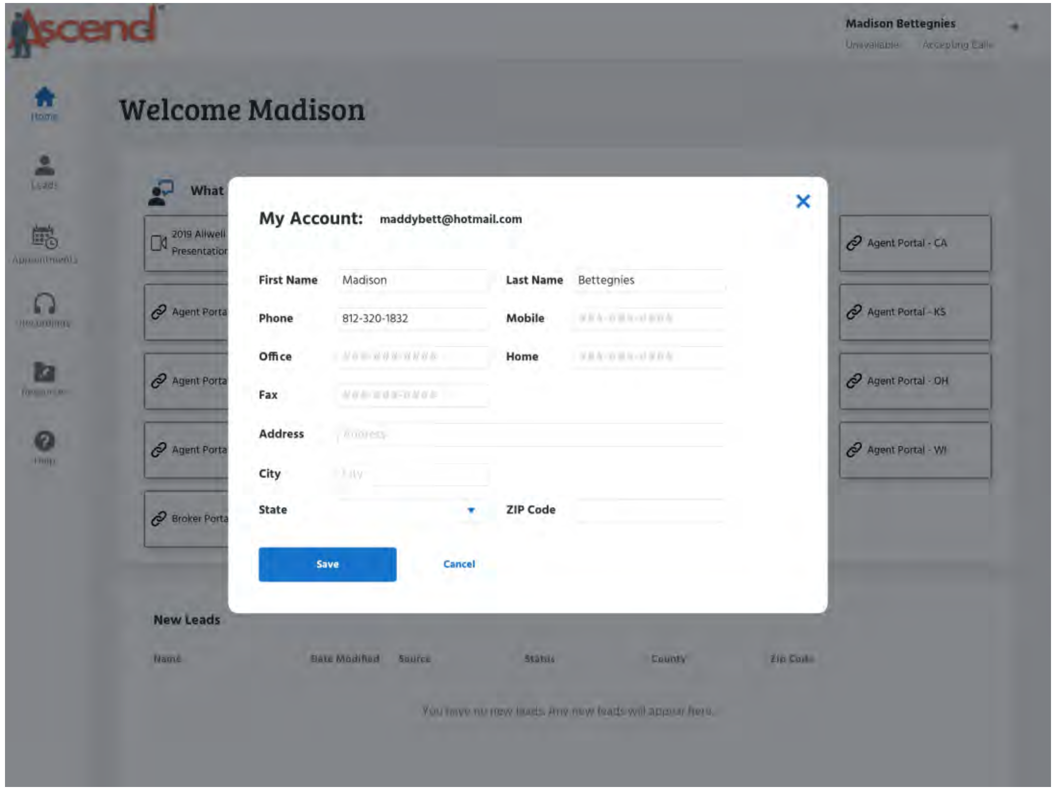
Drop-down Menu for Windows



- 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

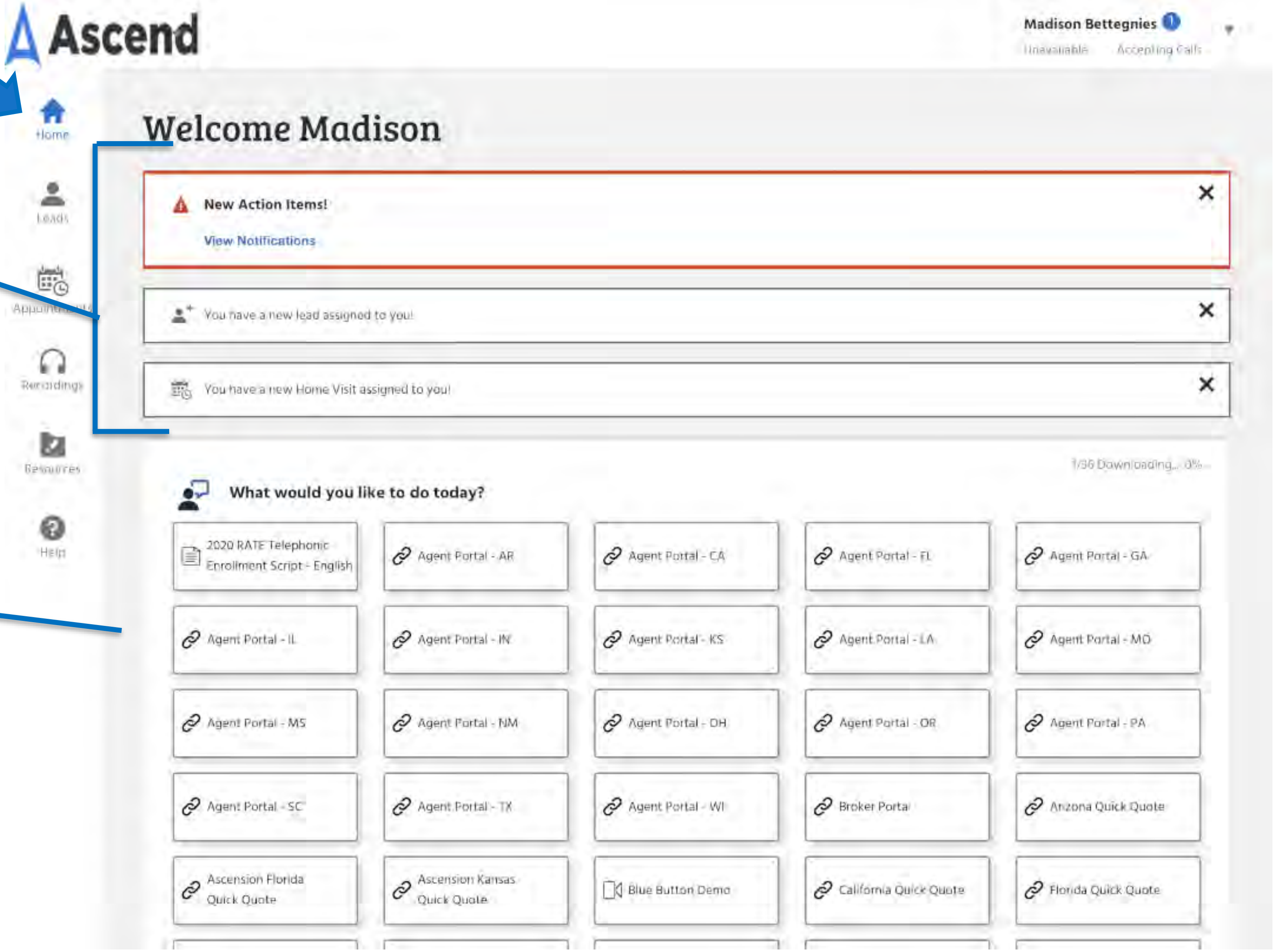
- Edit personal account information easily on AMA



HOME

Home Screen

Home



Notifications

Resource Quick Links

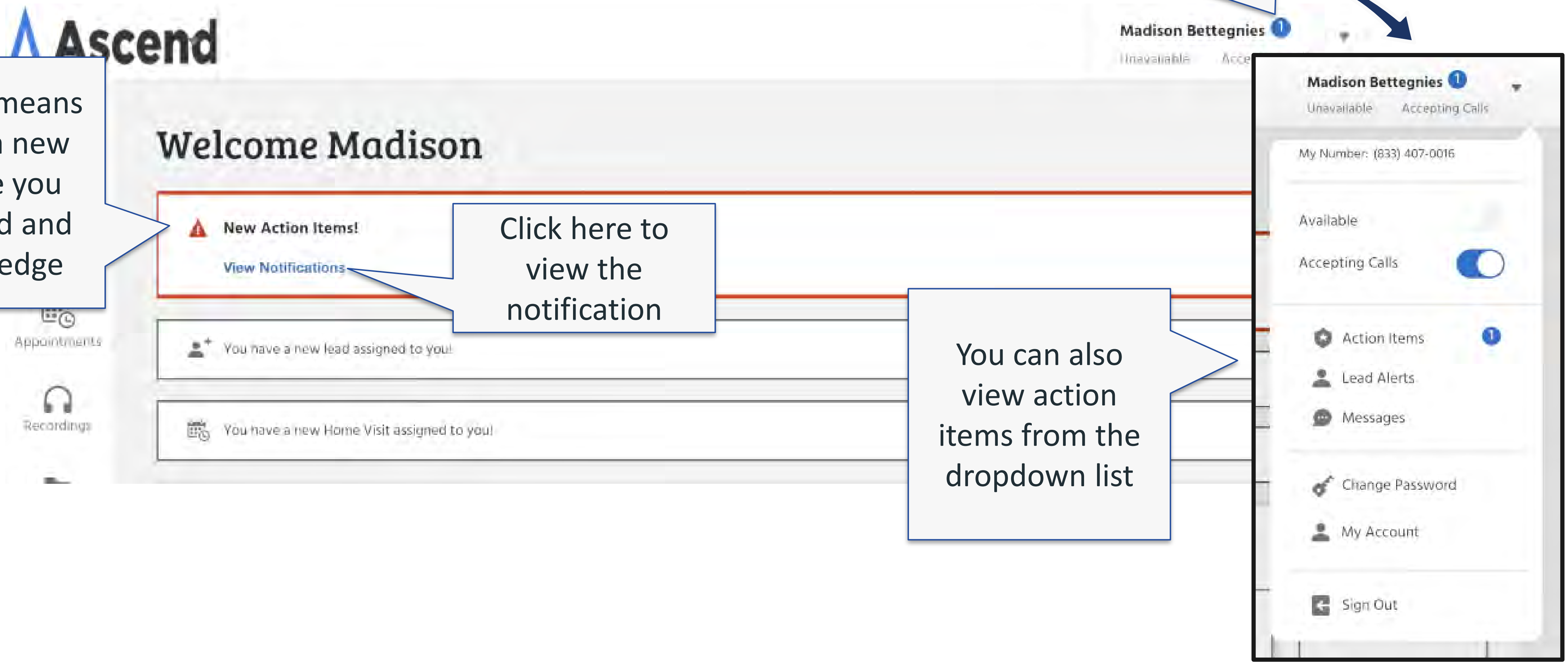
New Action Item

A number here shows how many action items you mustview

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

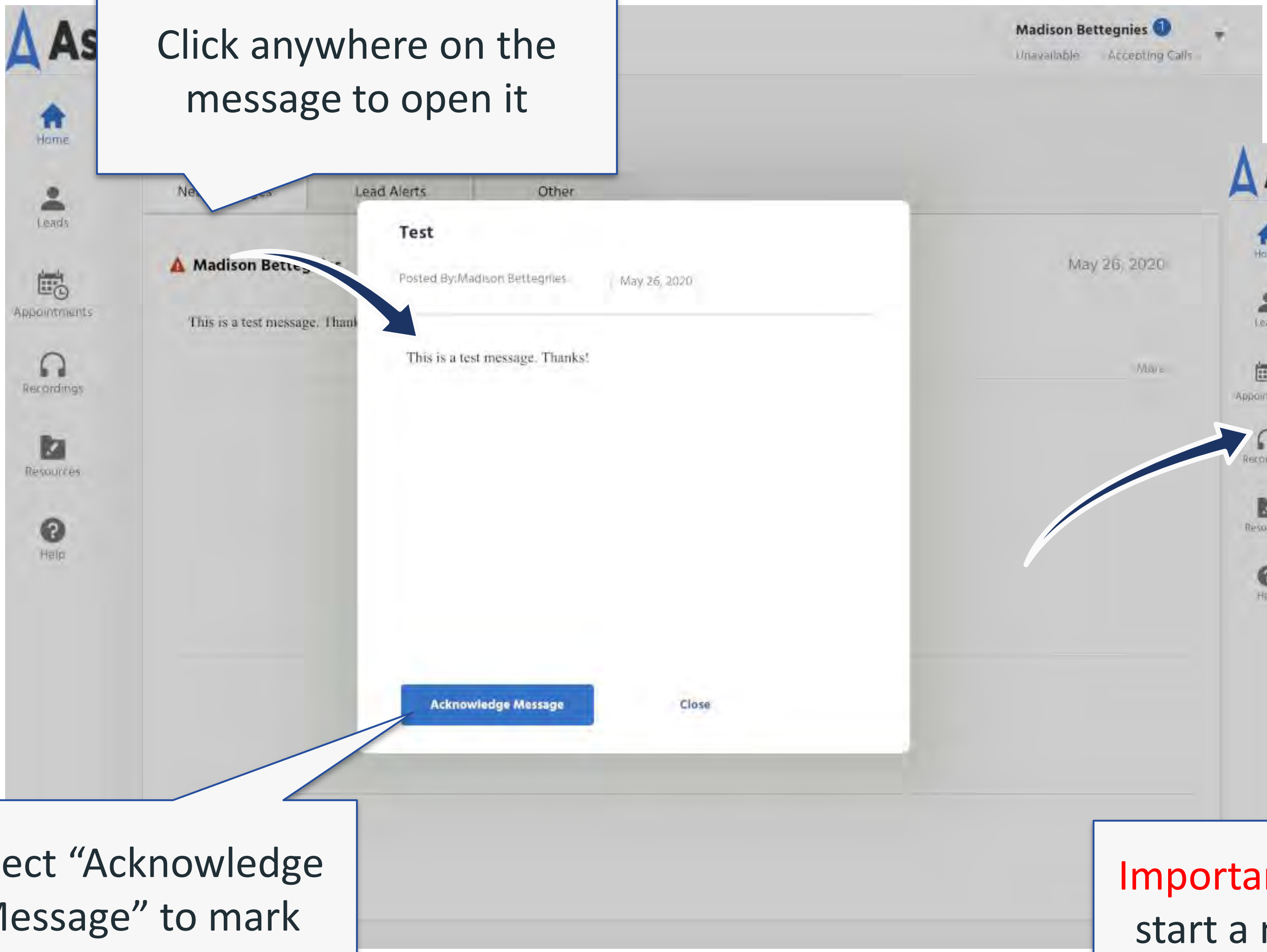
Click here to view the notification

You can also view action items from the dropdown list

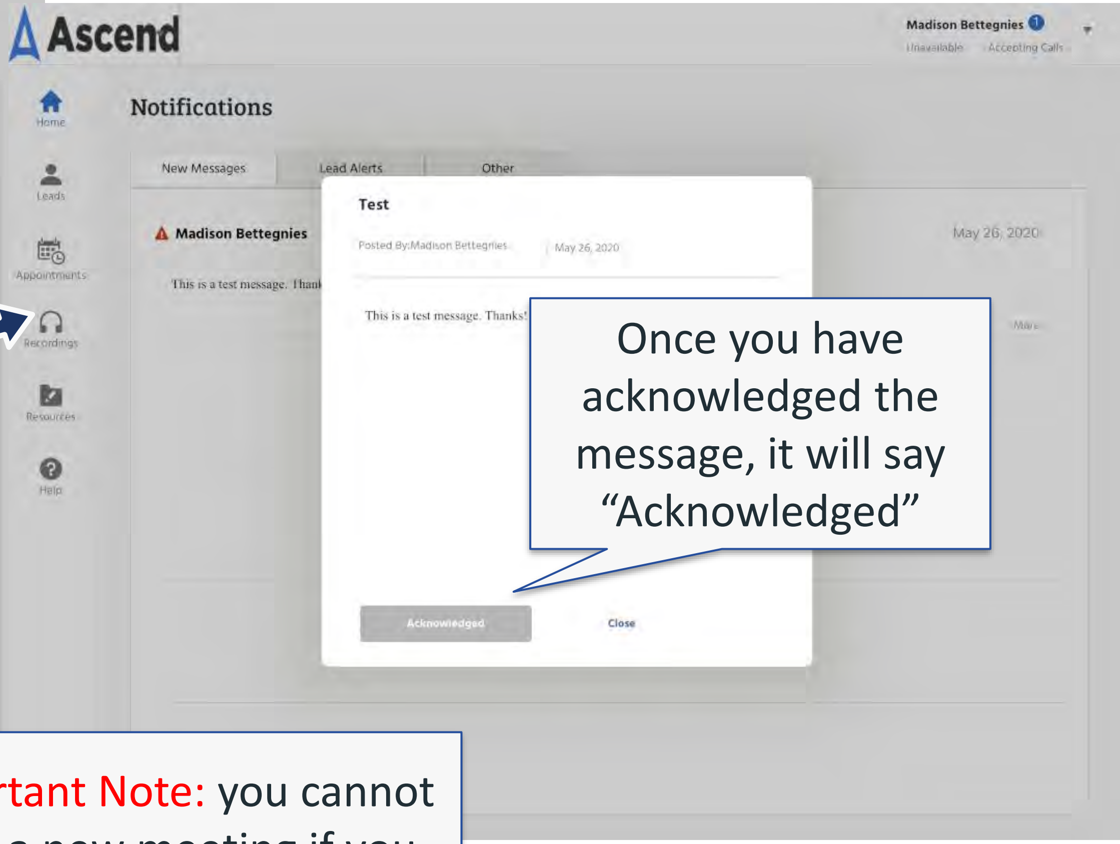


Acknowledging the Message

Click anywhere on the message to open it



Select “Acknowledge Message” to mark that you have read it



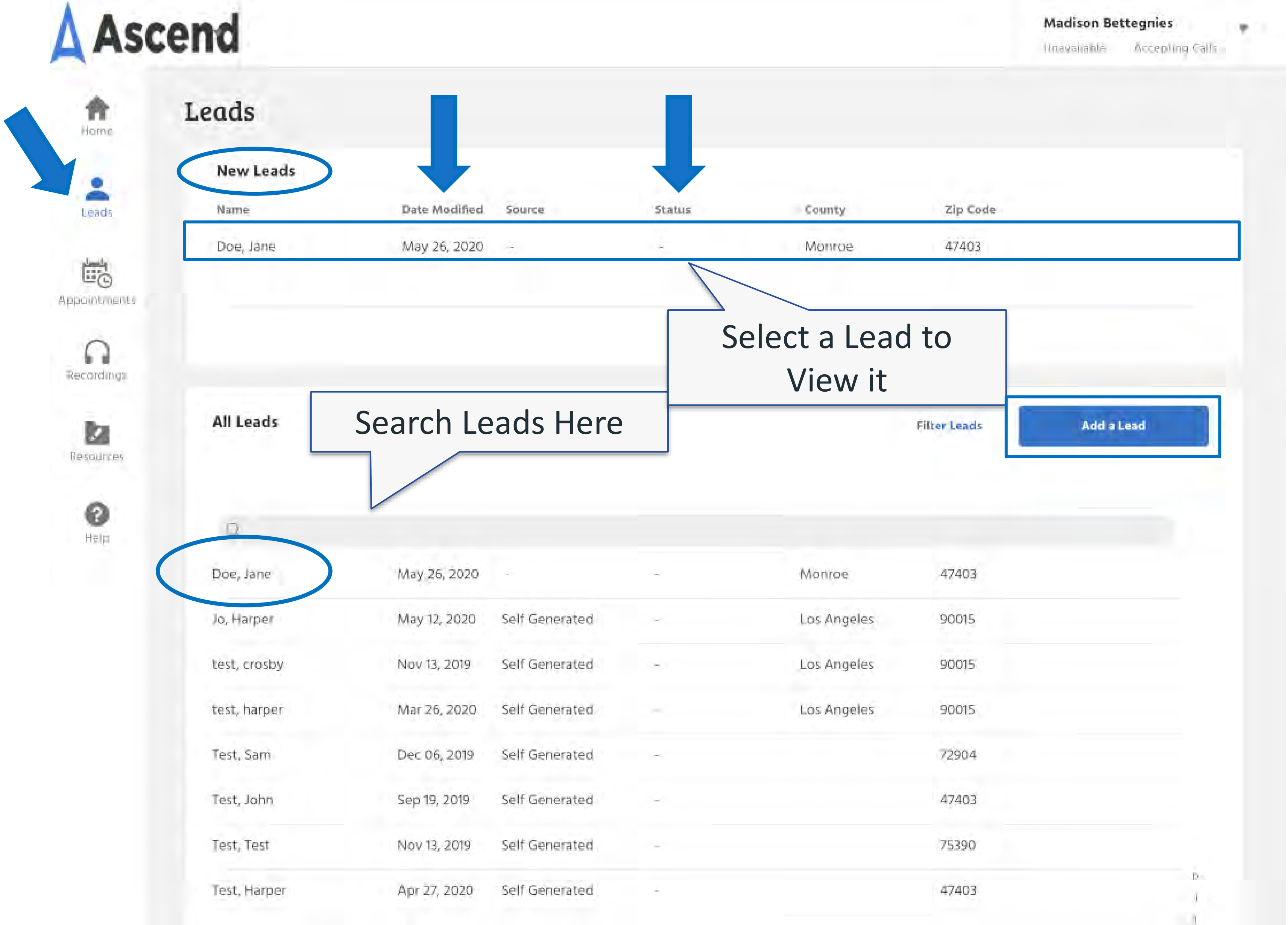
Once you have acknowledged the message, it will say “Acknowledged”

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

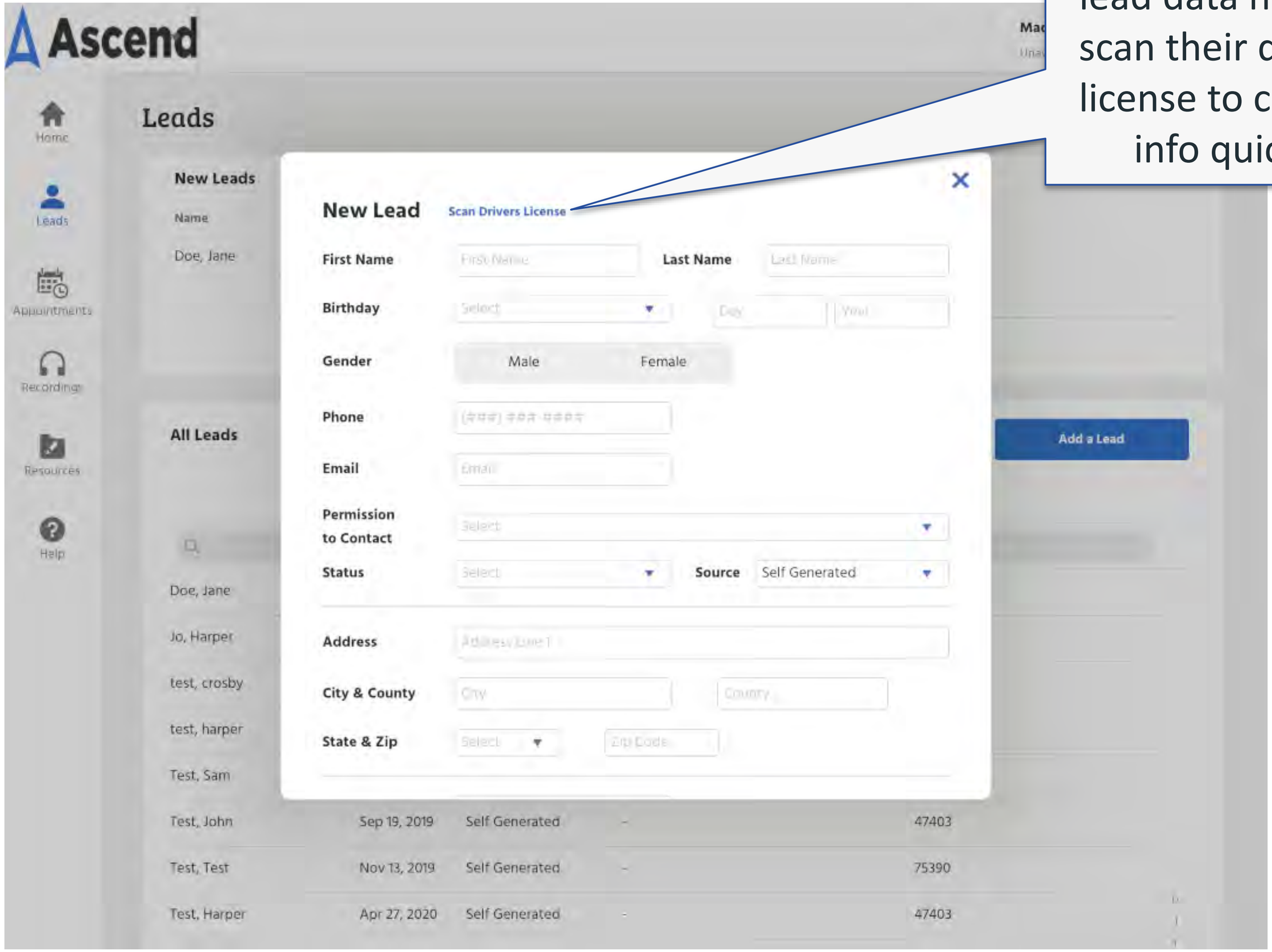
LEADS

Leads

Leads Screen



Add a Lead

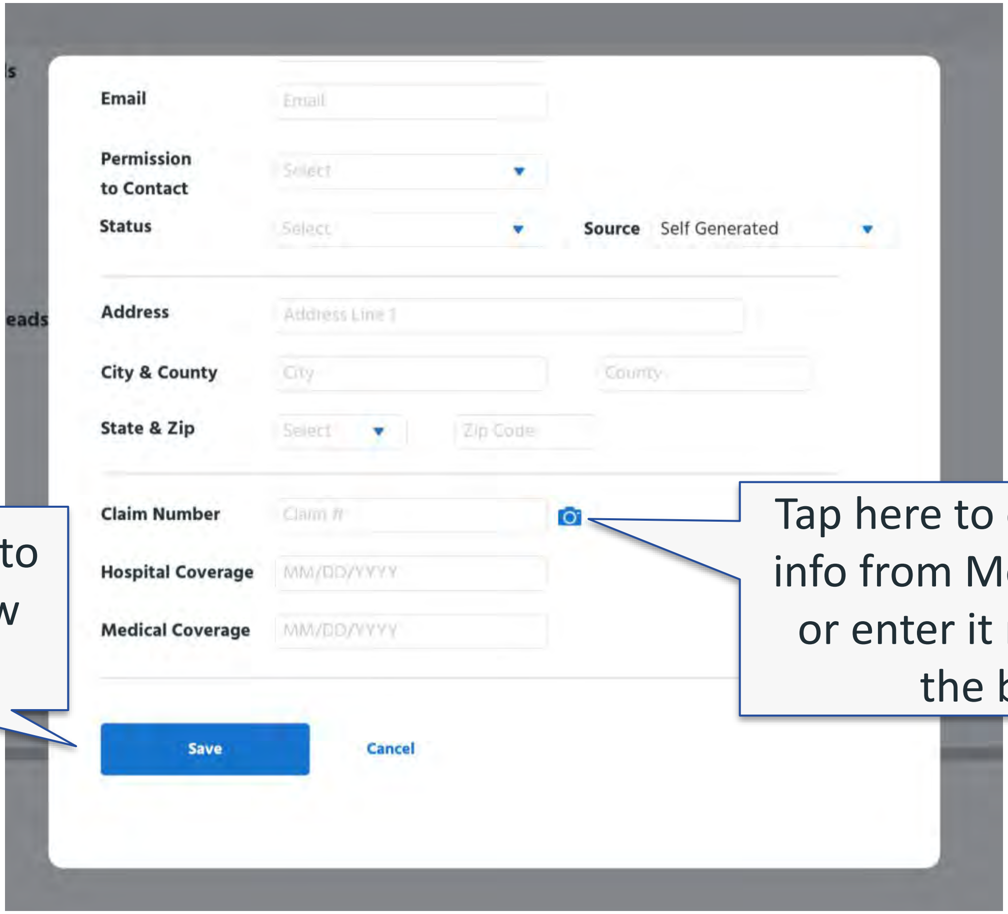


You can enter all lead data here, or scan their driver's license to capture info quickly

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.

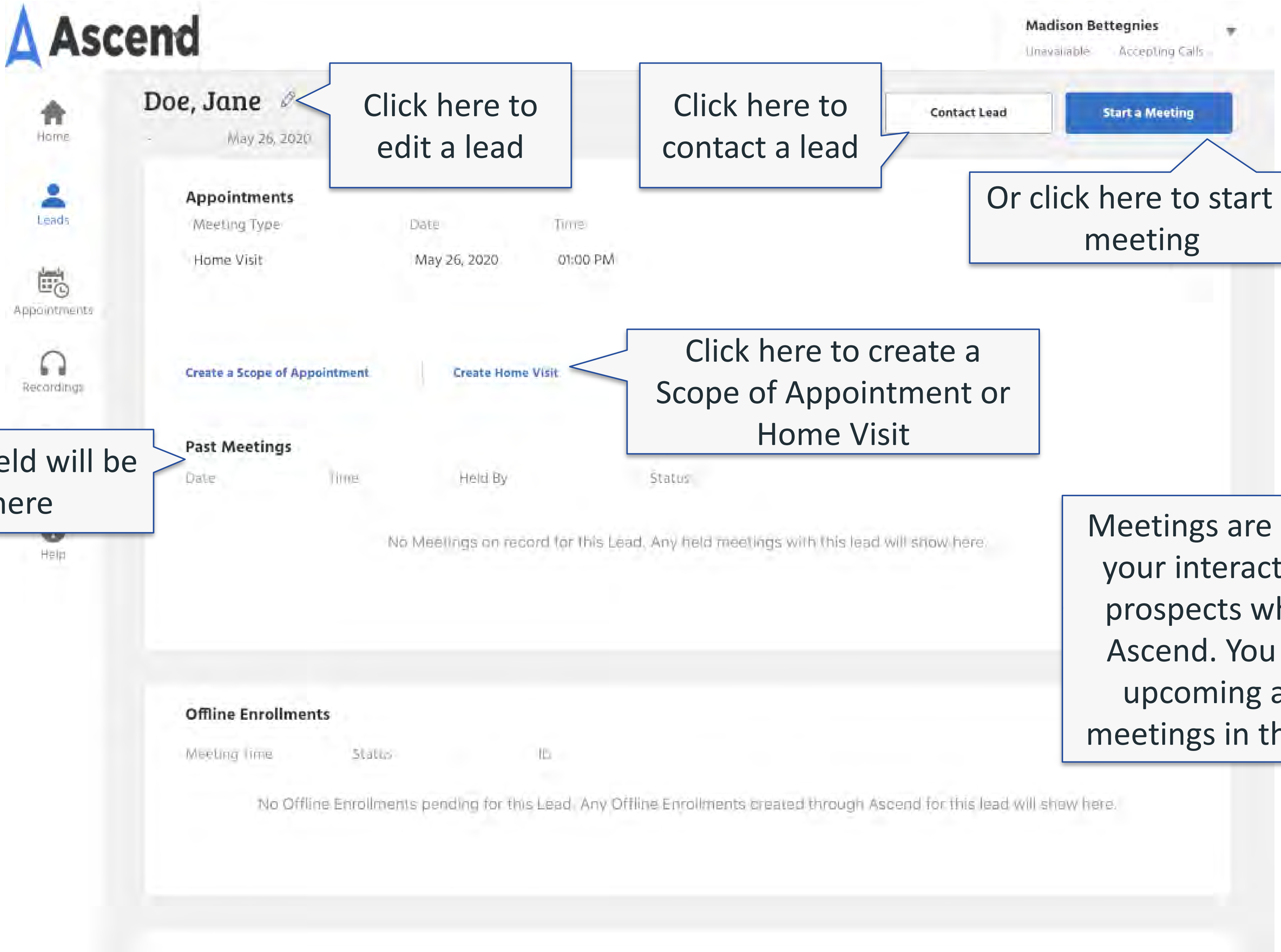
Finish Collecting Lead Info



Click "Save" to add the new lead

Tap here to capture scan info from Medicare card, or enter it manually in the boxes

Lead Info



Click here to edit a lead

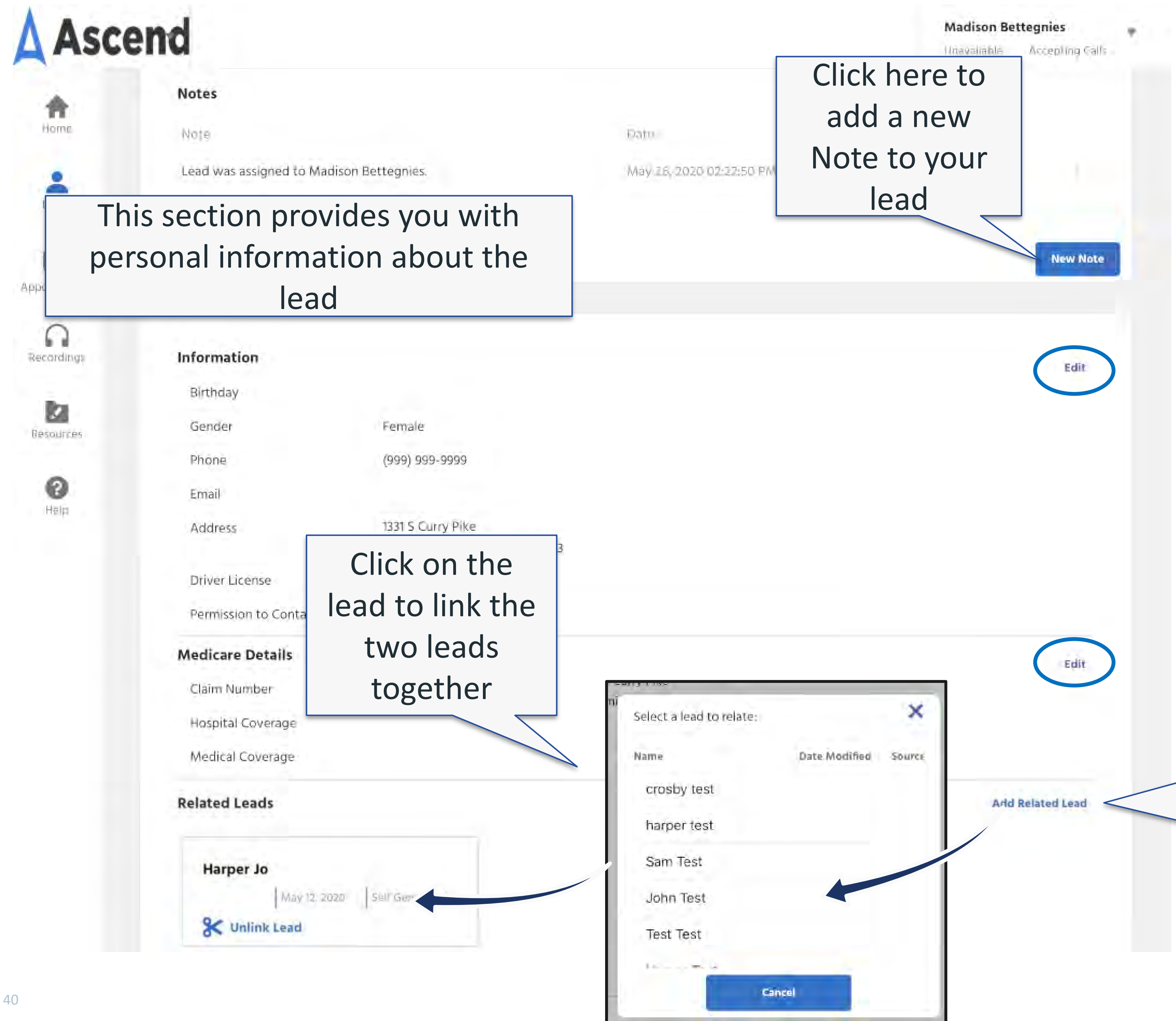
Click here to contact a lead

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.



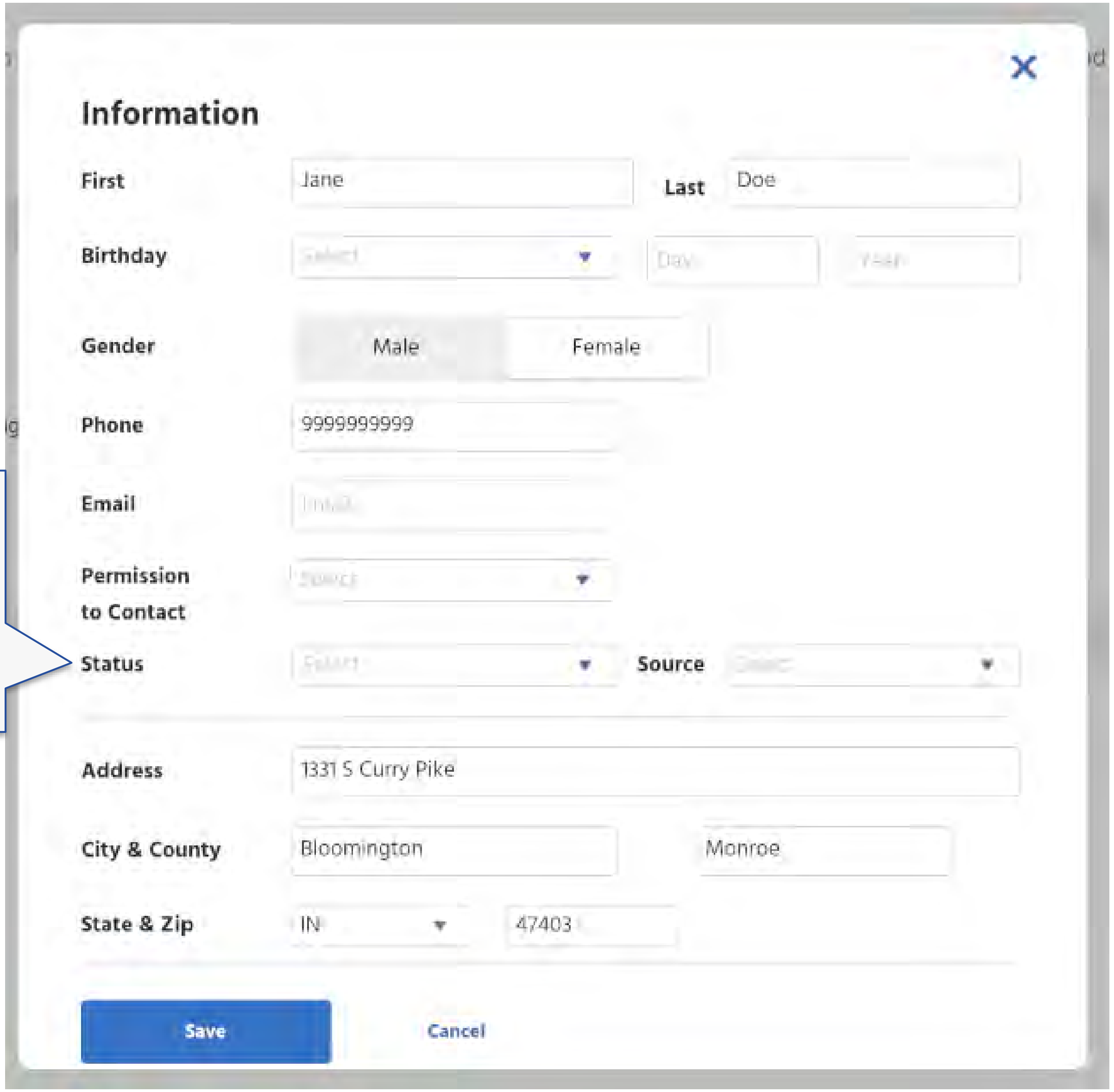
Click here to add a new Note to your lead

This section provides you with personal information about the lead

Click on the lead to link the two leads together

Add a related lead to fill out multiple applications simultaneously

Edit a Lead

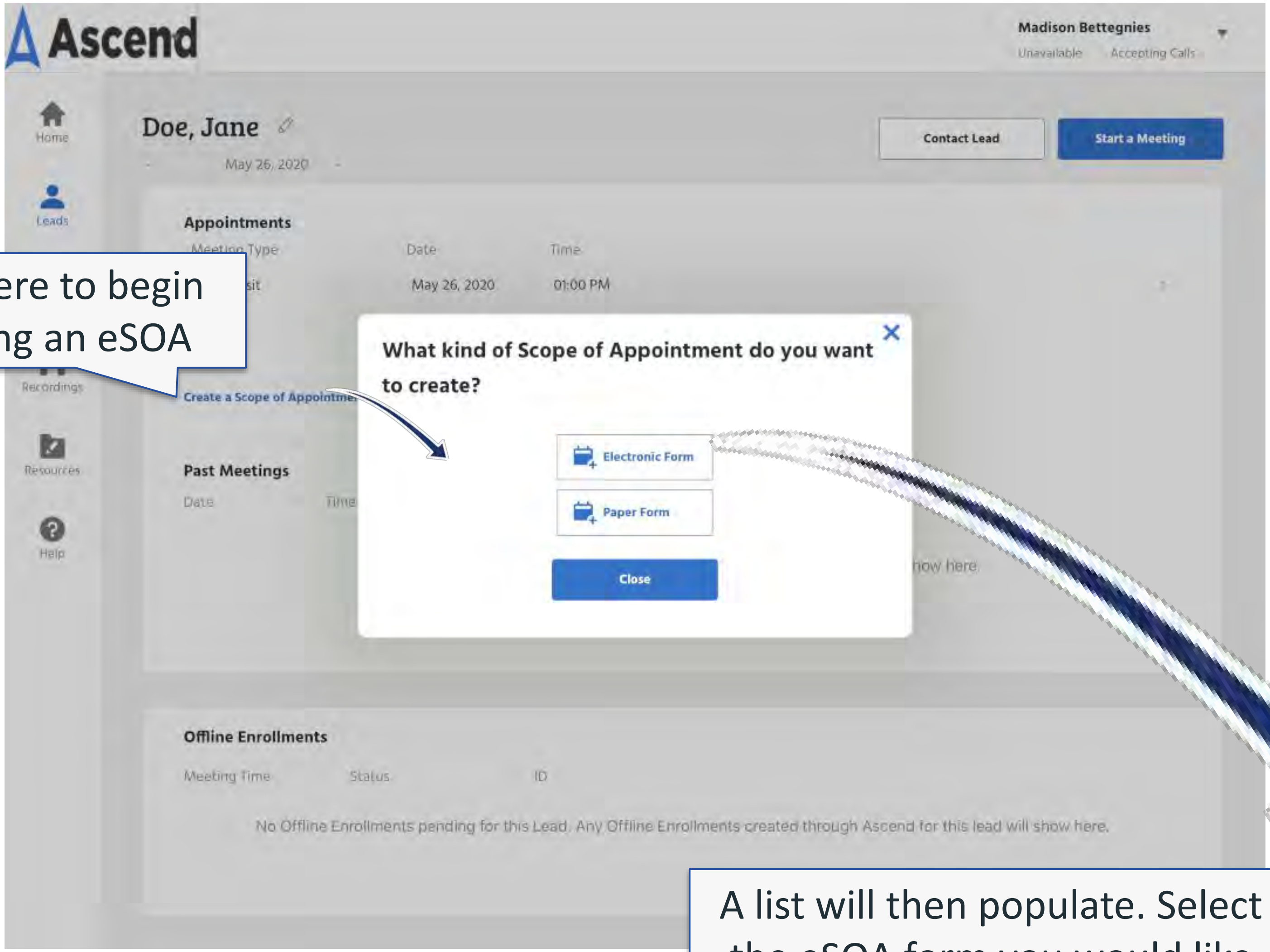


You can edit the lead's info from this screen, as well as update their status

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



Click here to begin creating an eSOA

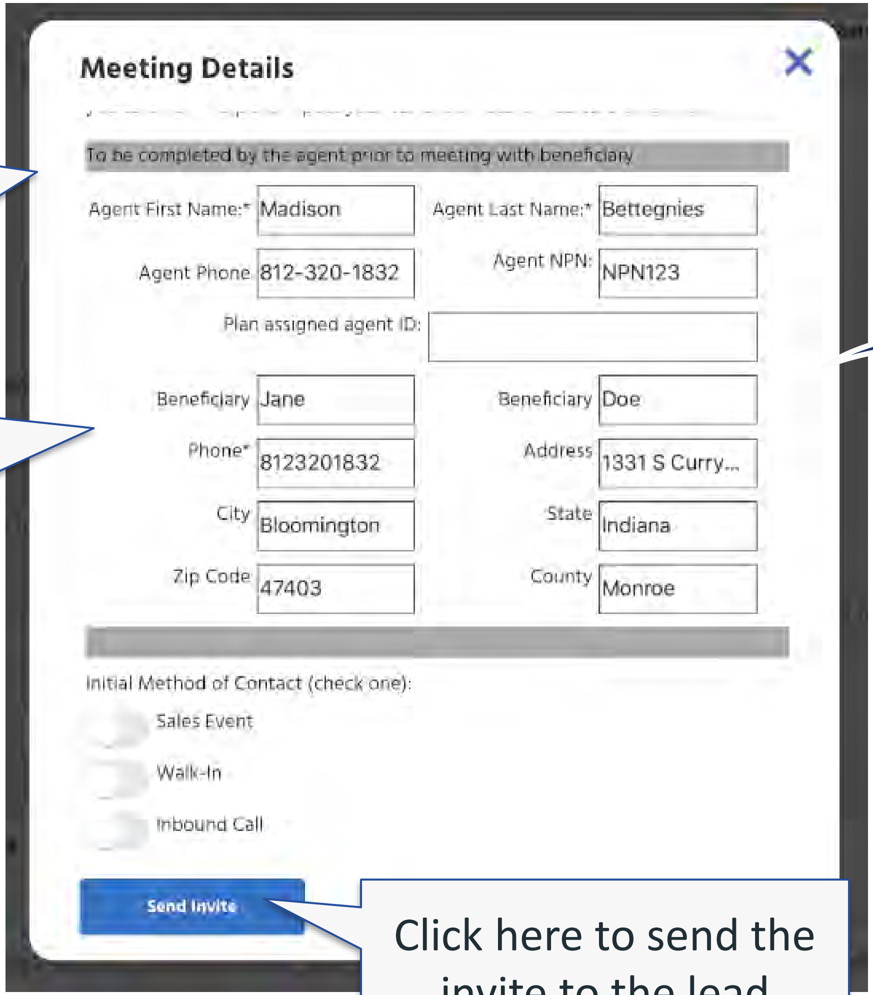
A list will then populate. Select the eSOA form you would like to use from the list.

Filling Out the eSOA

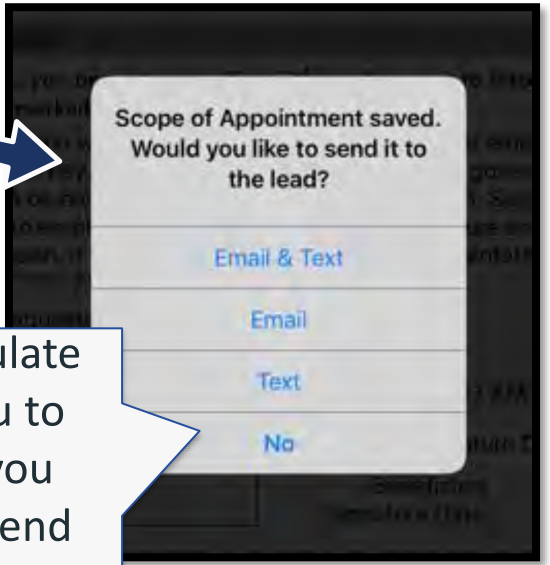
Note: Lead information and agent information will auto populate. Go to Lead Details or My Account to change information

Select the products you plan to discuss

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



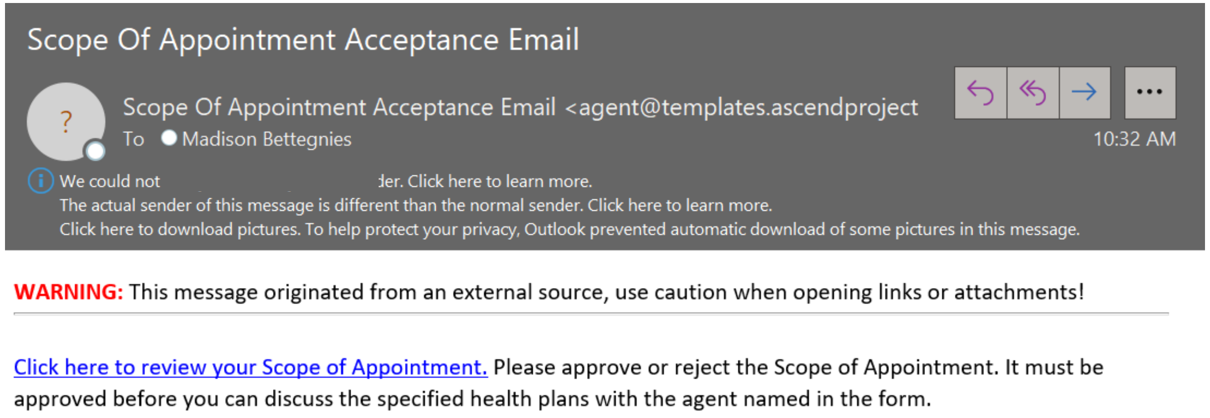
Click here to send the invite to the lead



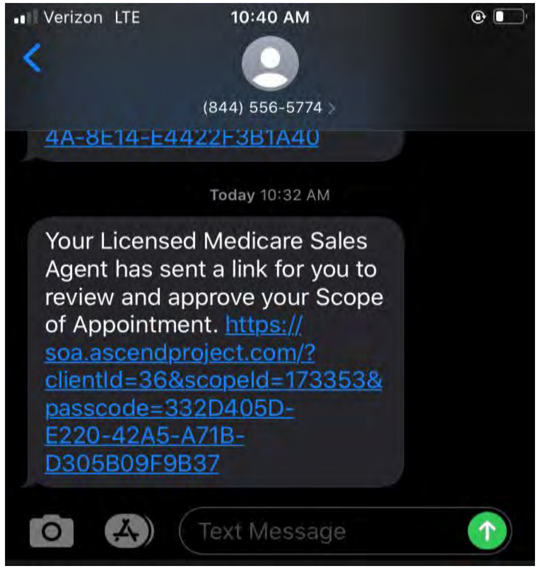
A box will populate prompting you to choose how you would like to send the invite. You can also select 'No' to only save the invite and not send it.

Prospect View

Email



Text



Prospect View of the eSOA

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]

Inital 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

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 Medicar 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.

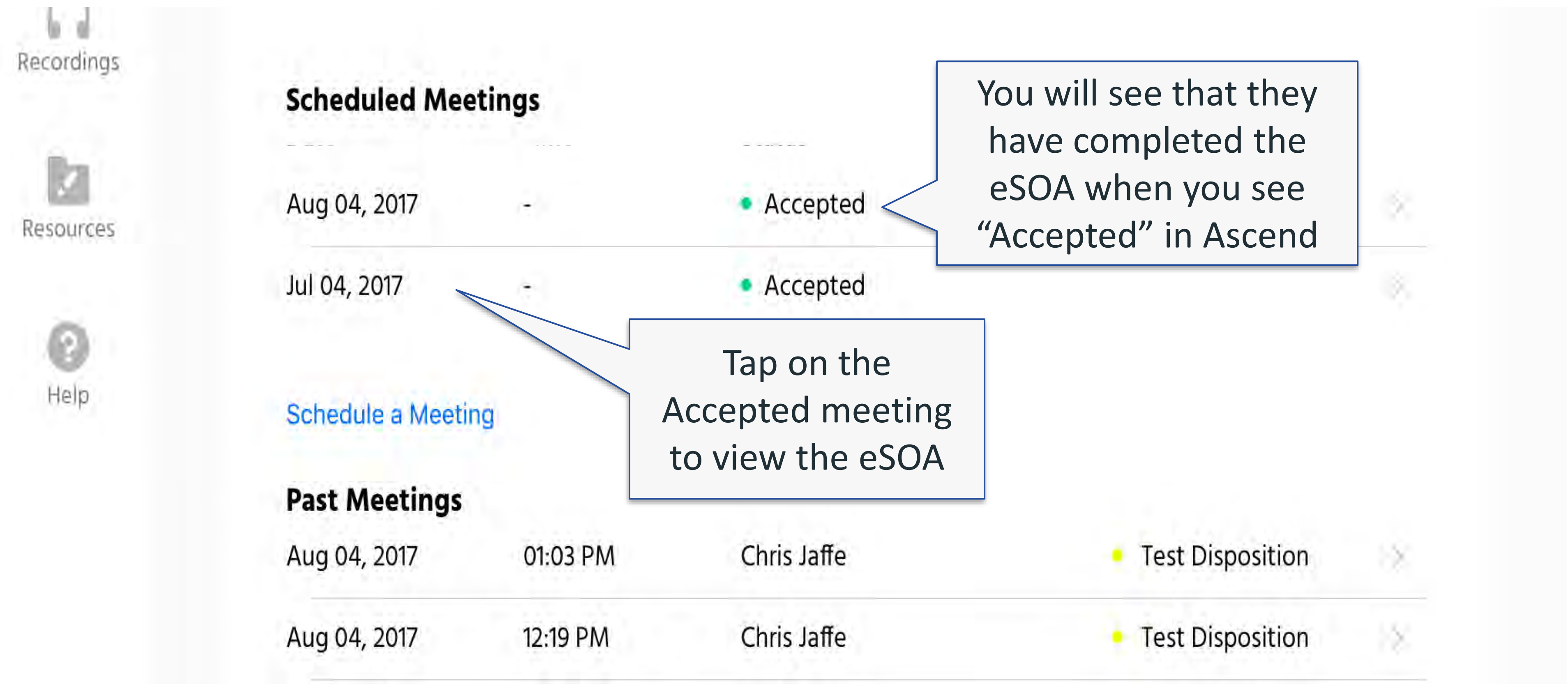
Requested Meeting Date: 08/04/2017

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

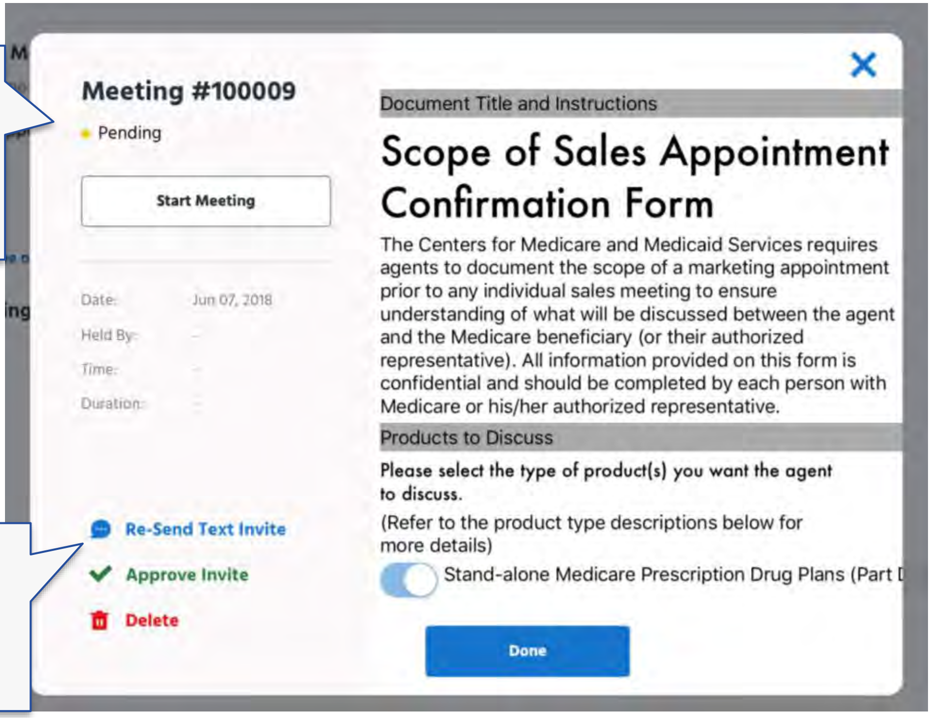


You will see that they have completed the eSOA when you see "Accepted" in Ascend

Tap on the Accepted meeting to view the eSOA

eSOA Status

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

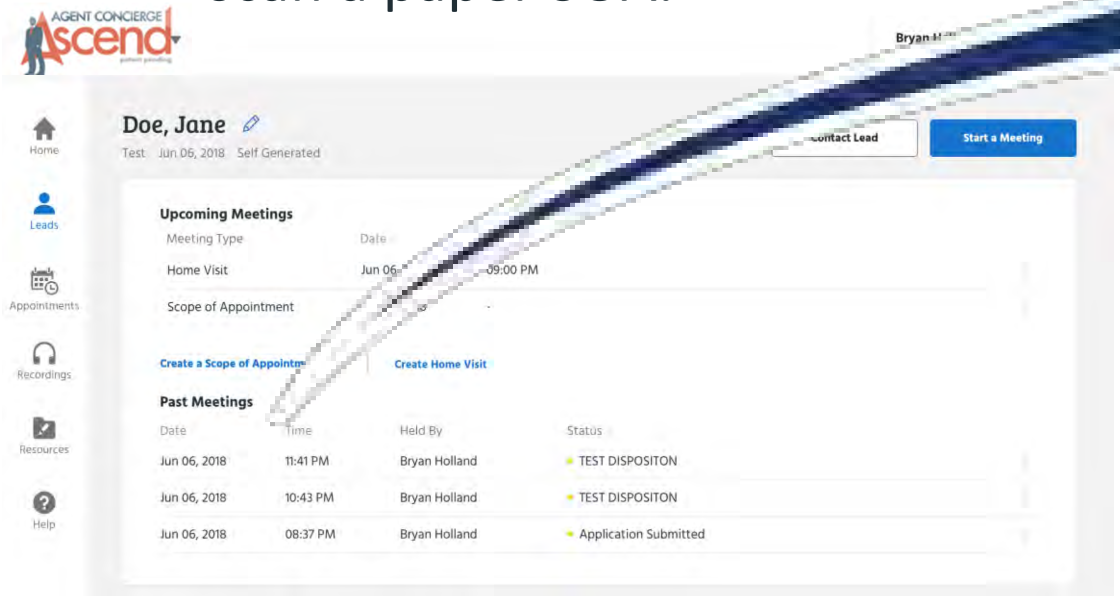


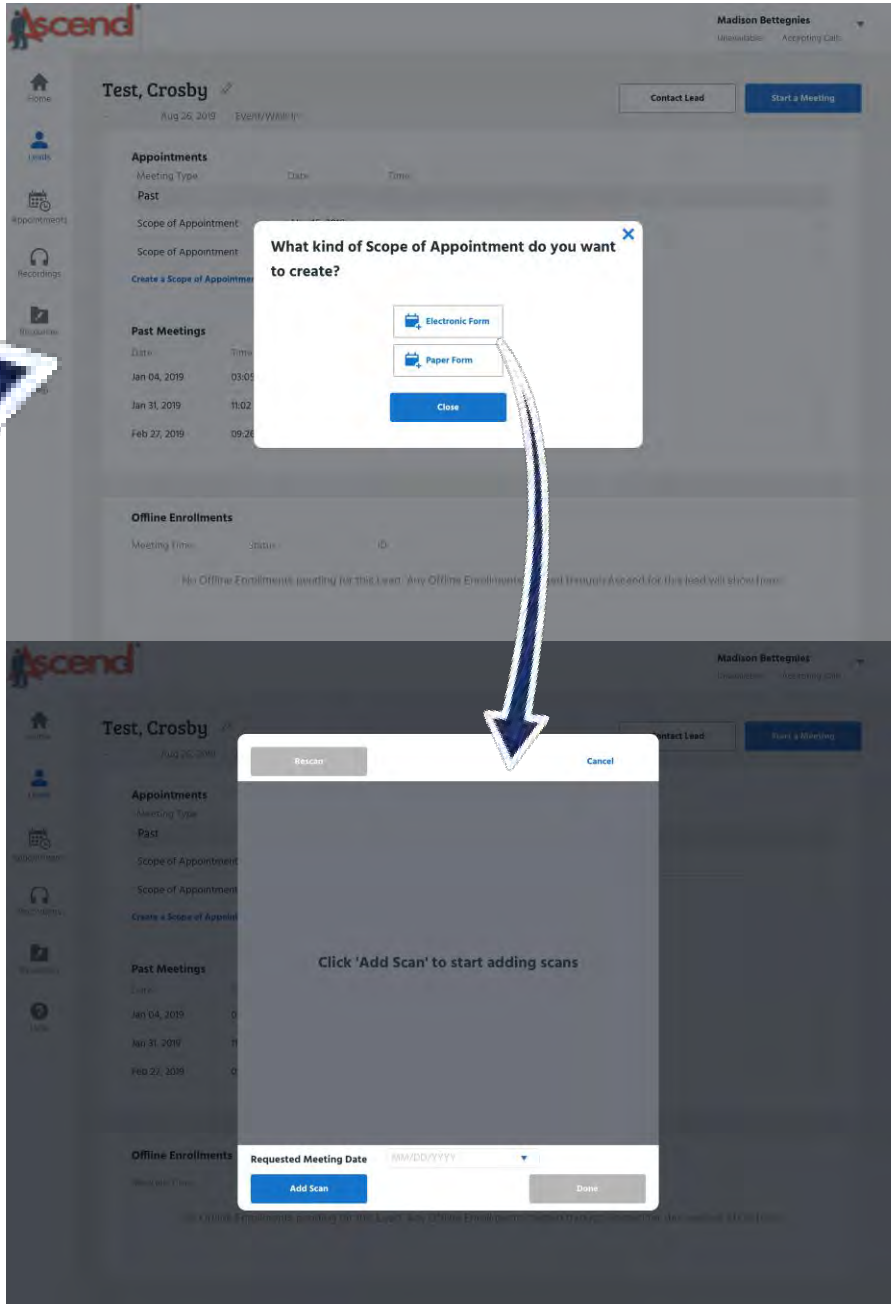
Tap here if you want to resend the eSOA

PAPER SCOPE OF APPOINTMENT

Paper Scope of Appointment

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



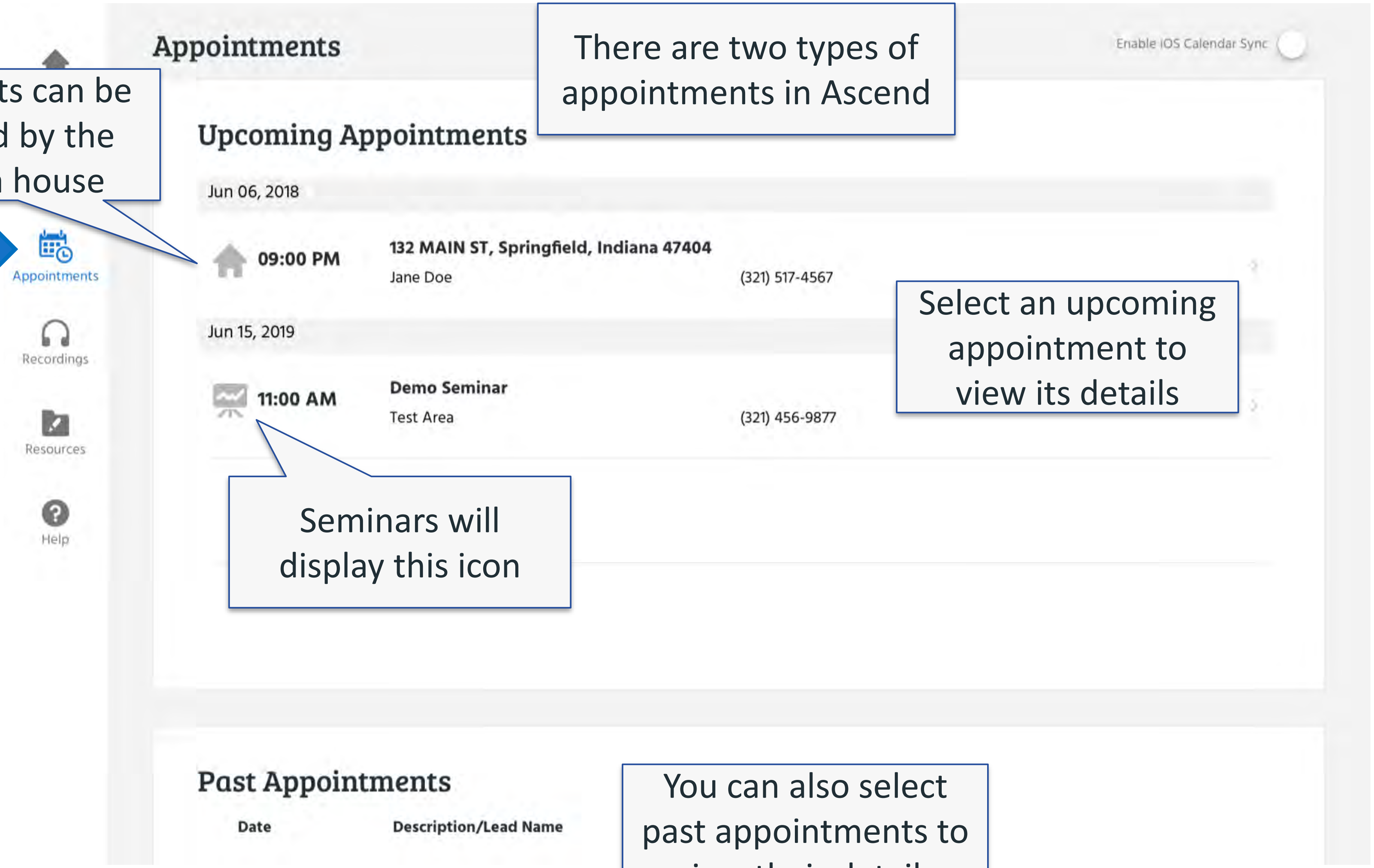


- Take a picture of the paper scope, select the requested meeting date, and Save the scope. It will attach to the enrollment application.

APPOINTMENTS

Appointments

Appointments



There are two types of appointments in Ascend

Home visits can be identified by the icon of a house

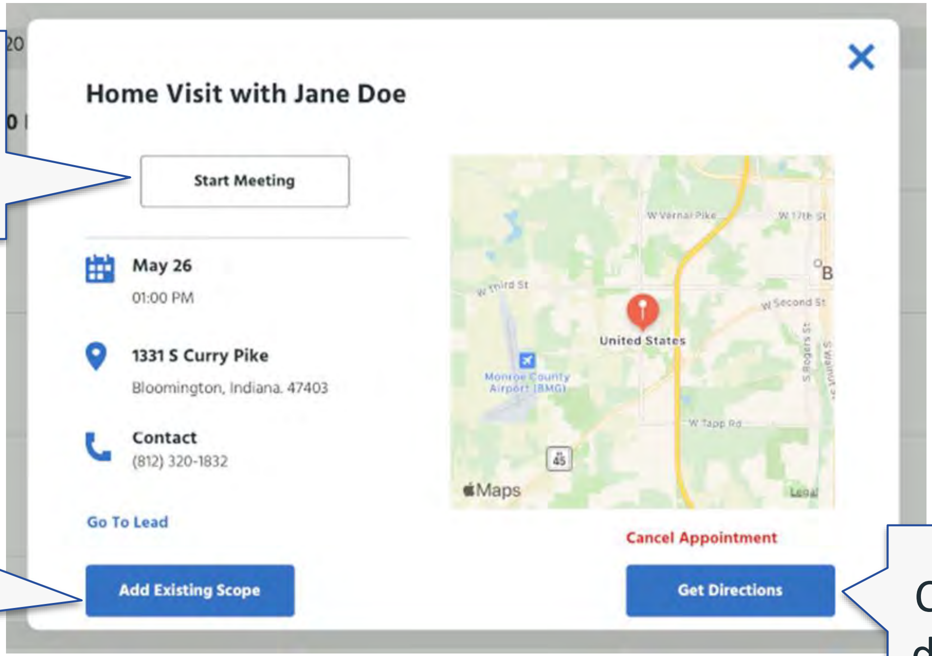
Select an upcoming appointment to view its details

Seminars will display this icon

You can also select past appointments to view their details

Home Visit Info Screen

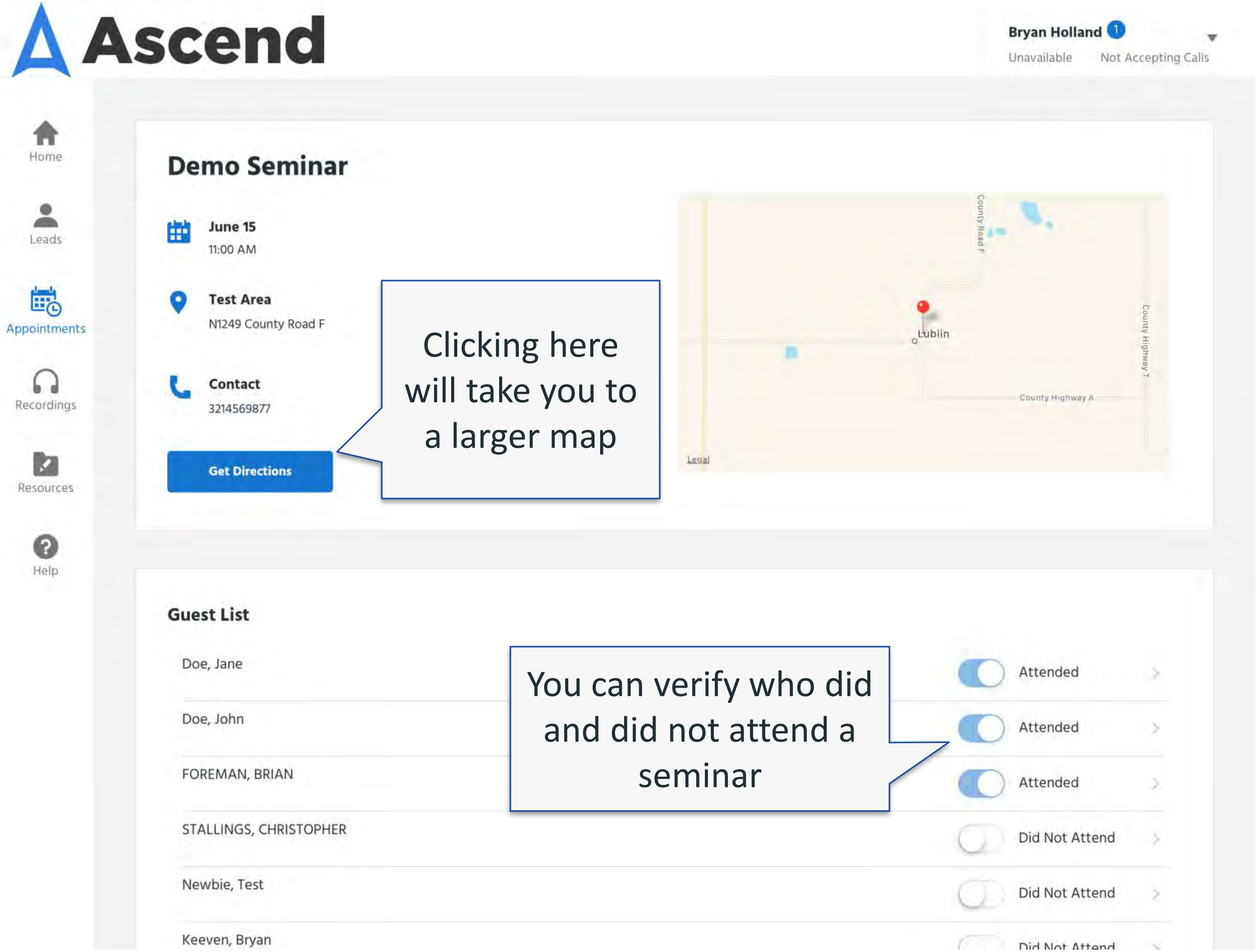
You can start a meeting from the Home Visit screen



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

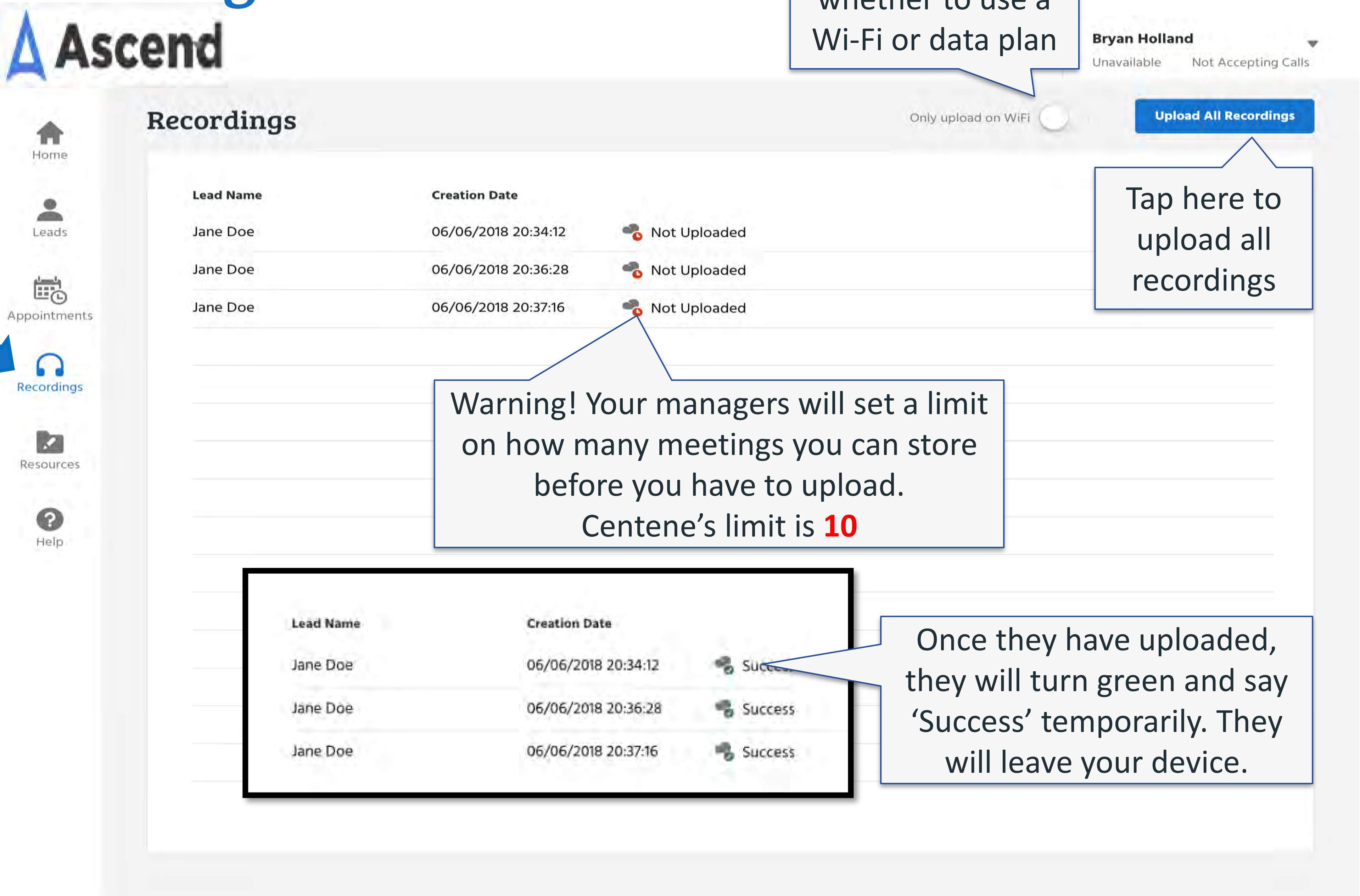
Click here to get directions to the Home Visit

Seminar Info Screen



RECORDINGS

Recordings



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

Tap here to upload all recordings

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

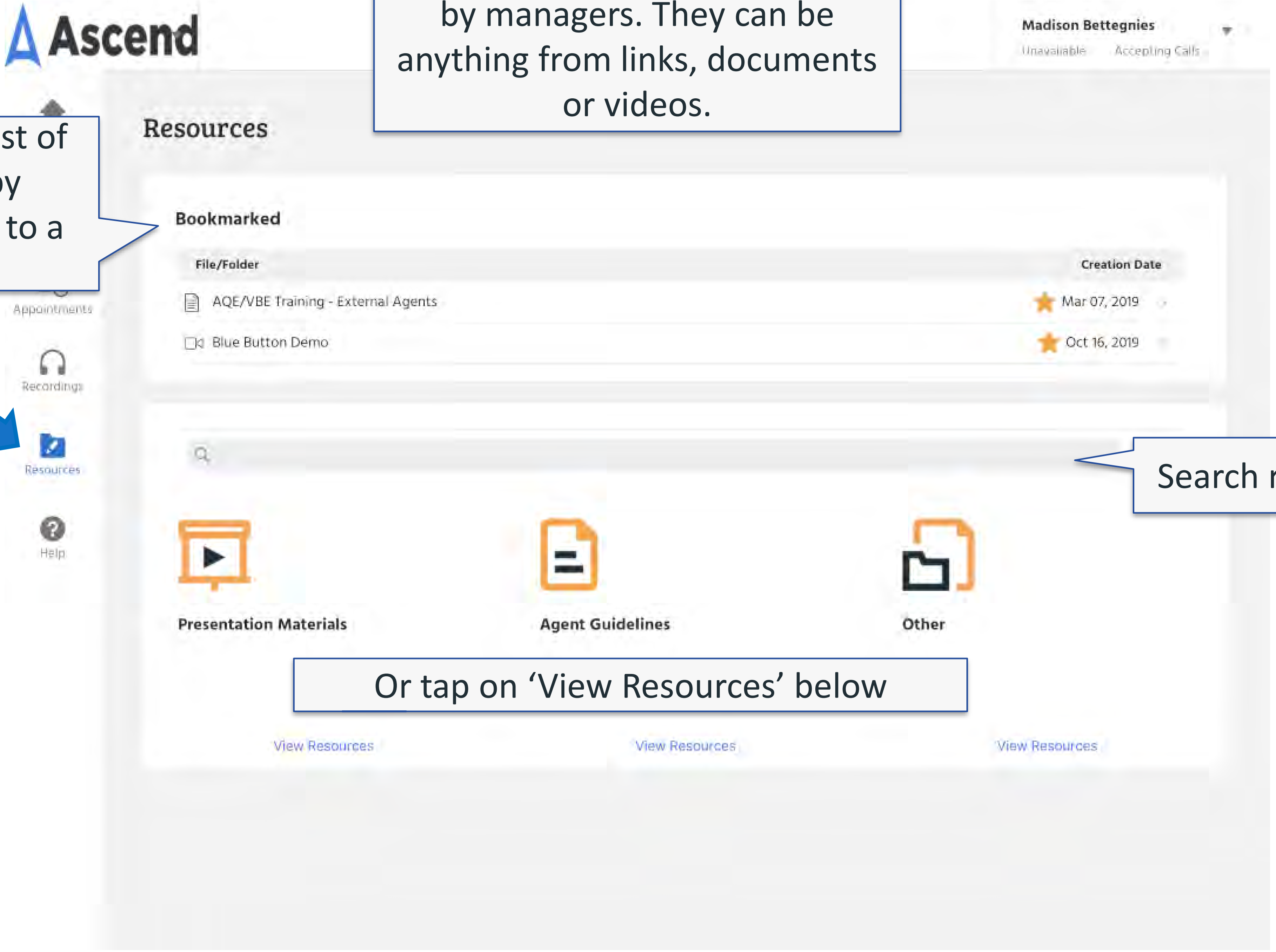
Once they have uploaded, they will turn green and say 'Success' temporarily. They will leave your device.

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

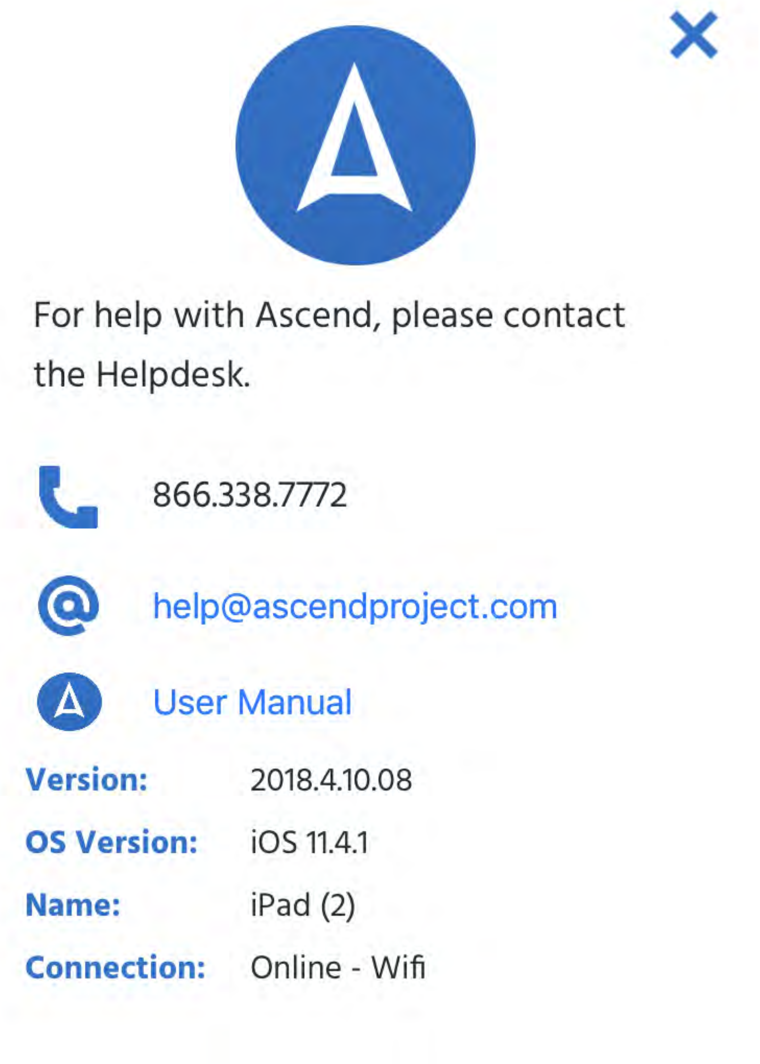


Search resources here

Or tap on 'View Resources' below

HELP

Help



- 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

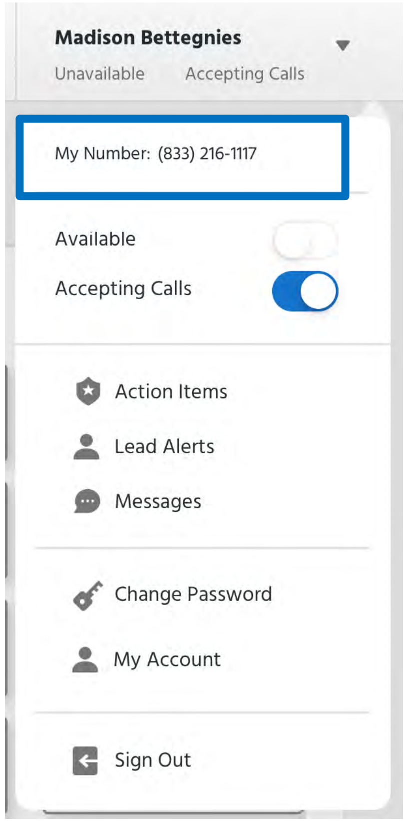
What are the benefits?

- **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

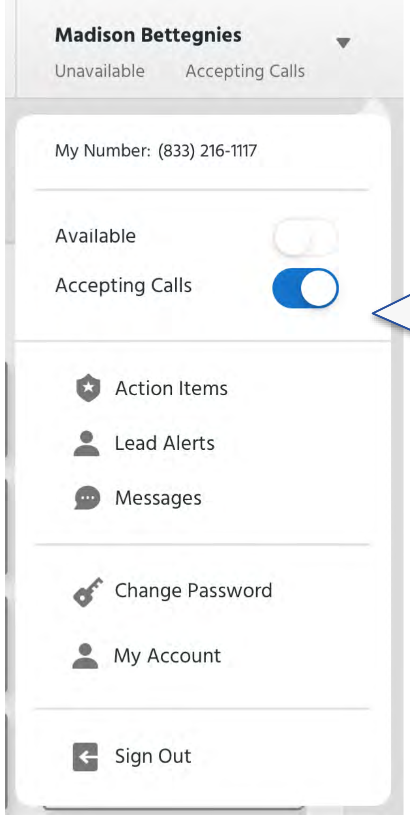
- Schedule an appointment with your prospect at a time where you are both available.
- Your unique RATE number can be found in the drop-down menu in the Ascend Mobile Application. Provide this to the prospect.
- You cannot receive a RATE call if you are in a meeting already.
- If you are doing a telephonic 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.

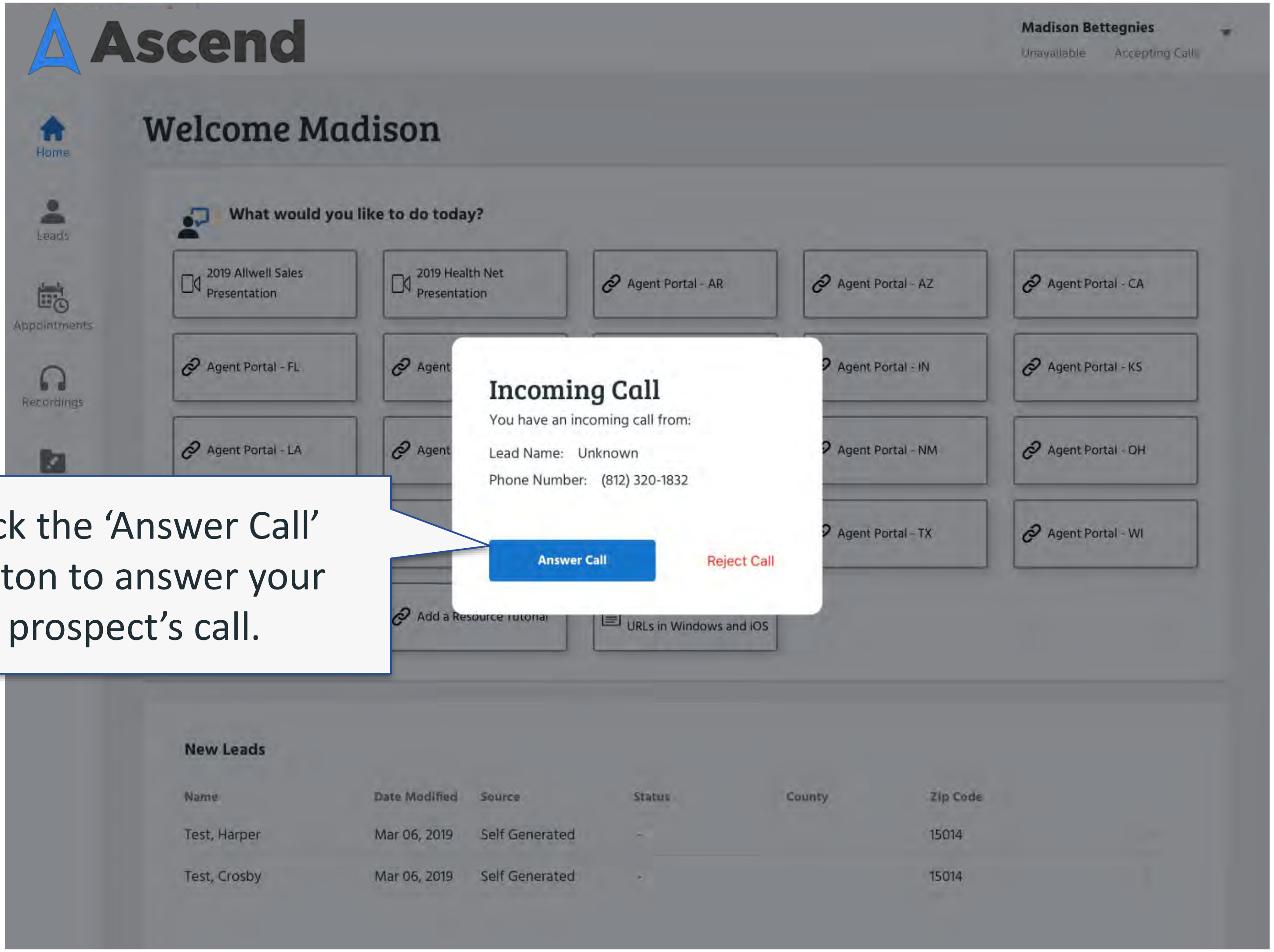
Step 2

- 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.

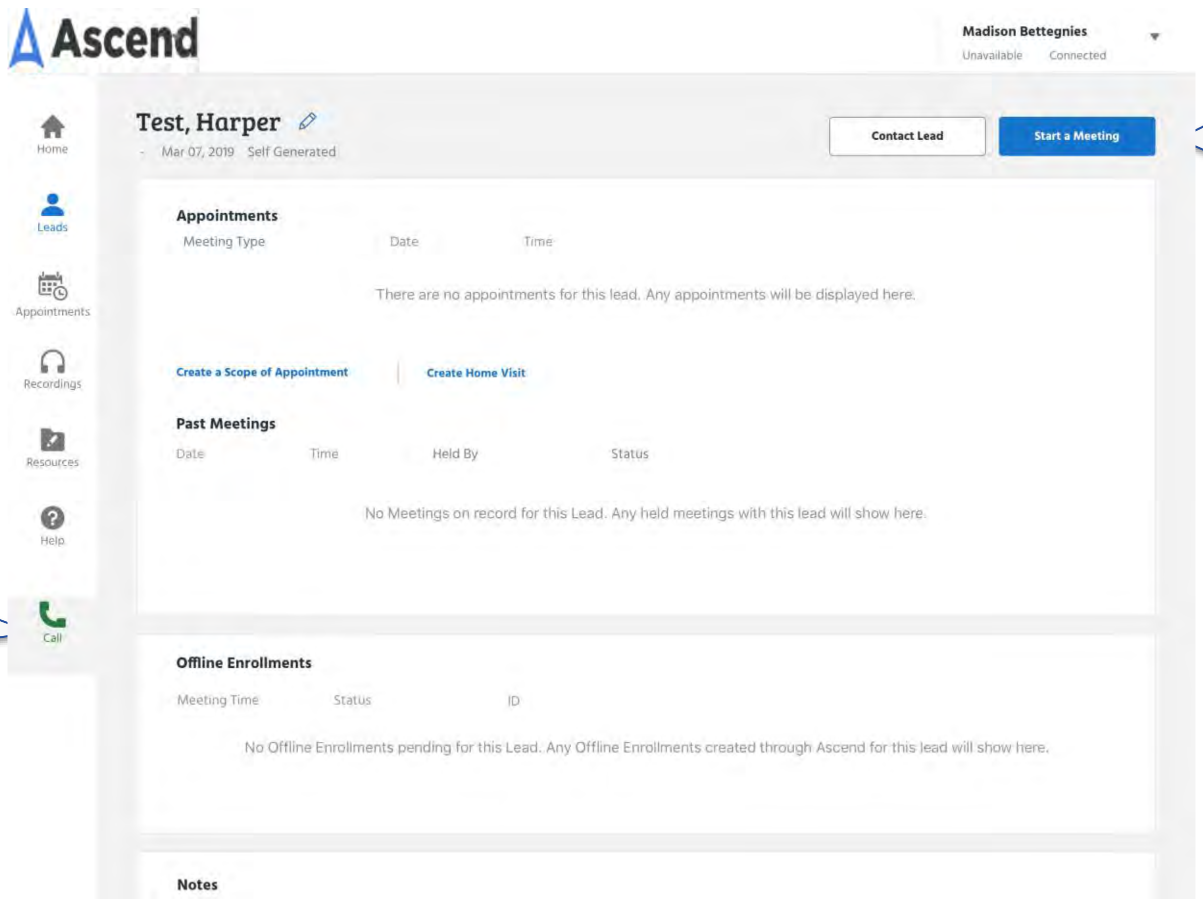
Receiving the Call



Click the 'Answer Call' button to answer your prospect's call.

Lead Screen

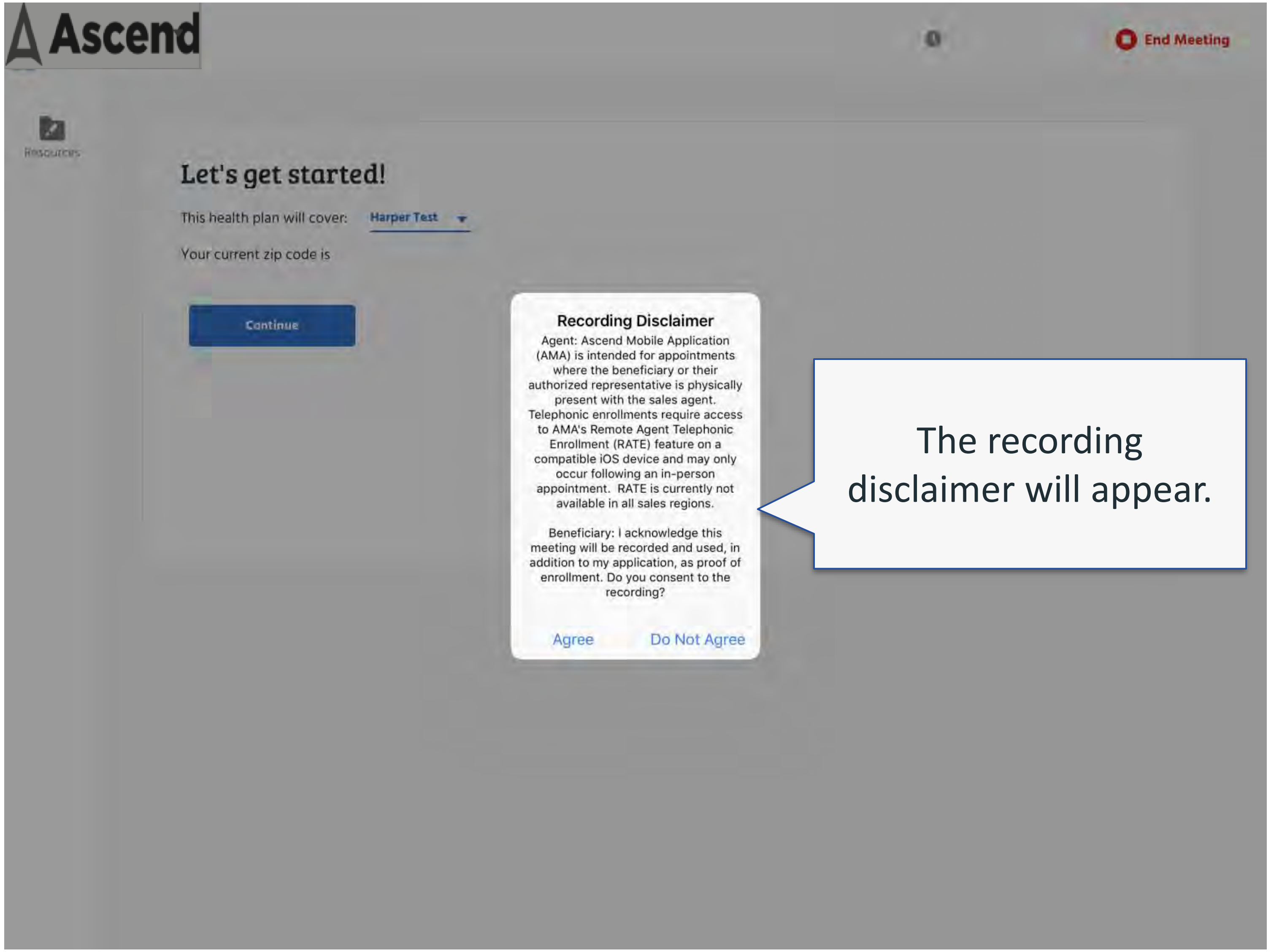
- After accepting the call, you will be directed to the 'Lead' screen.



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



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

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.

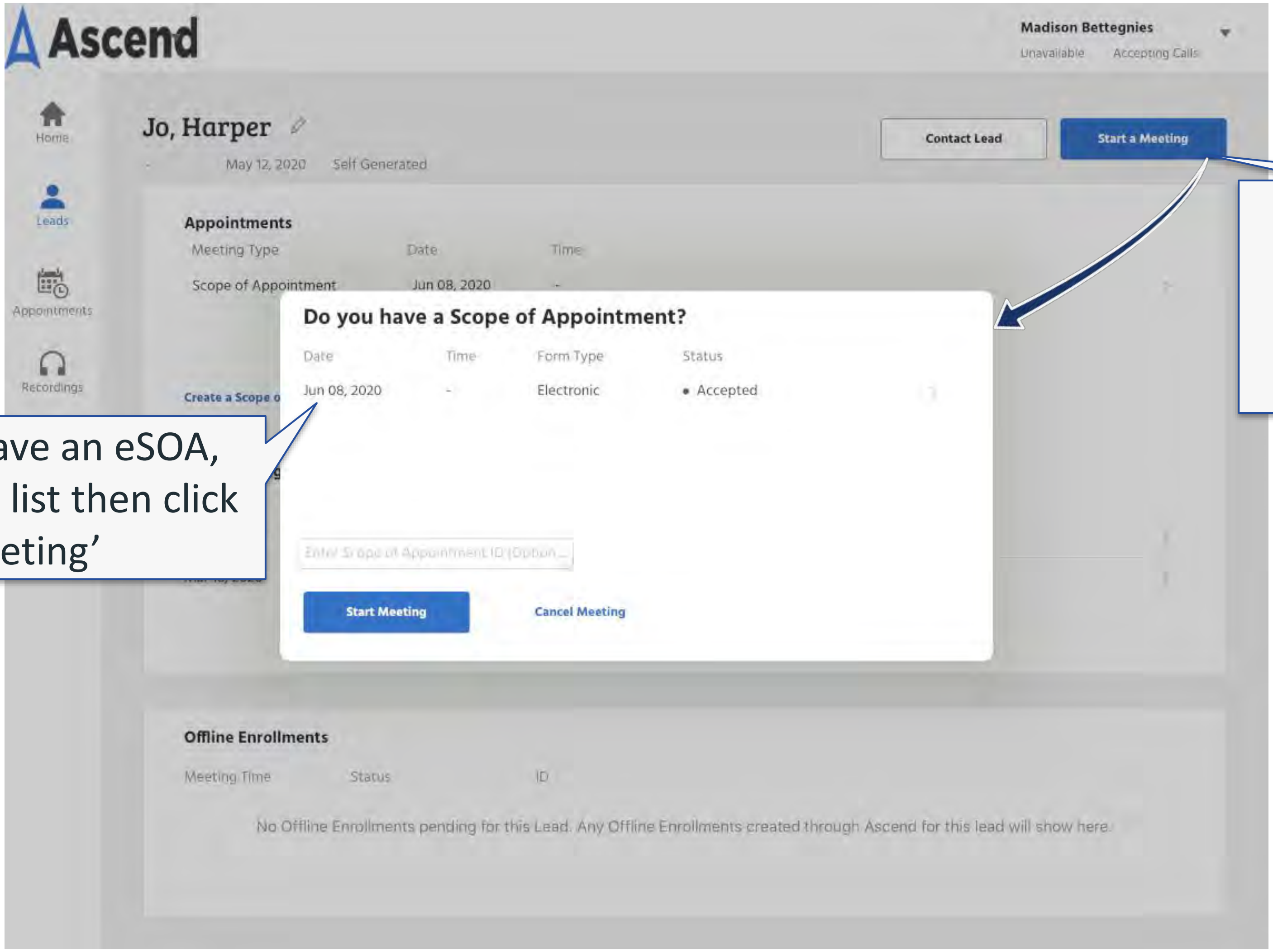
If a plan offers optional benefit buy up package(s), review the buy up package(s) and premium amount(s) and ask if he/she would like to add the buy-up package.

Remember to add the

ASCEND QUOTE & ENROLLMENT

GETTING STARTED

Start a Meeting in AMA



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'

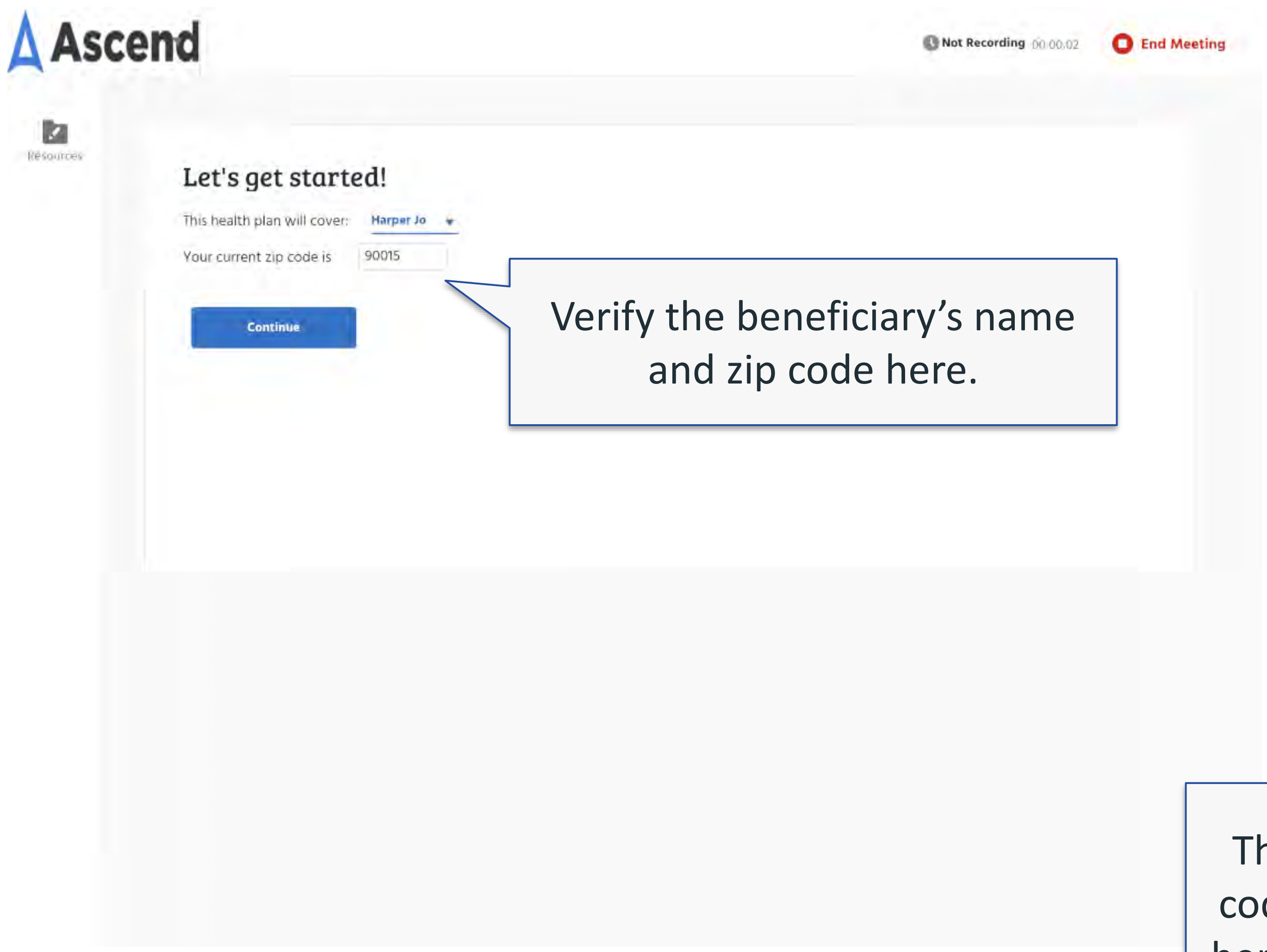
Recording Disclaimer

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



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

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

CHANGING URLS

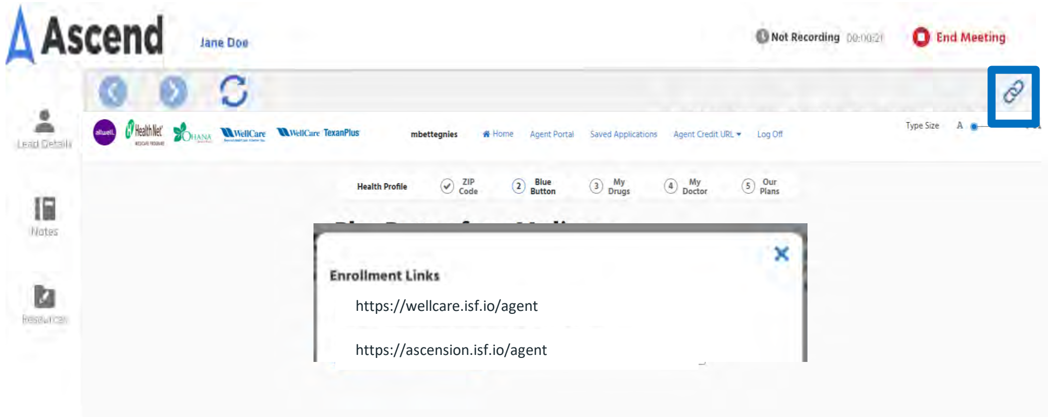
Only applies to agents also selling Ascension Complete

iOS

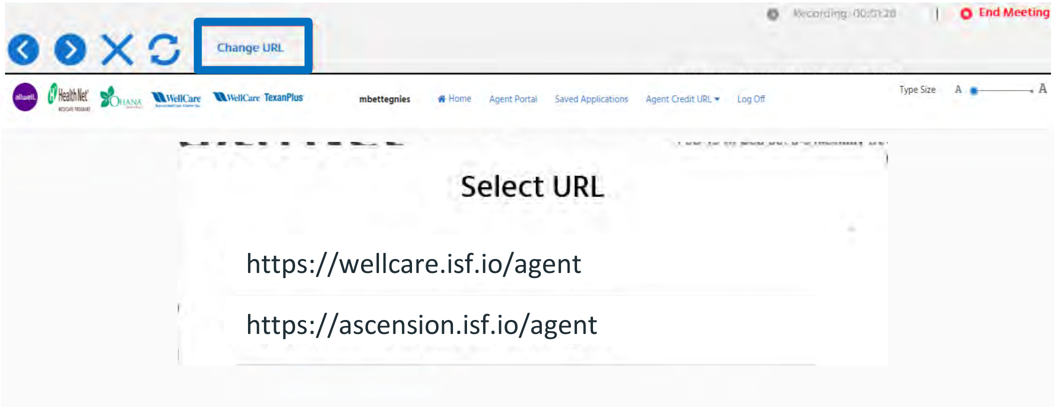
- From the enrollment page, select the hyperlink icon

- 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?

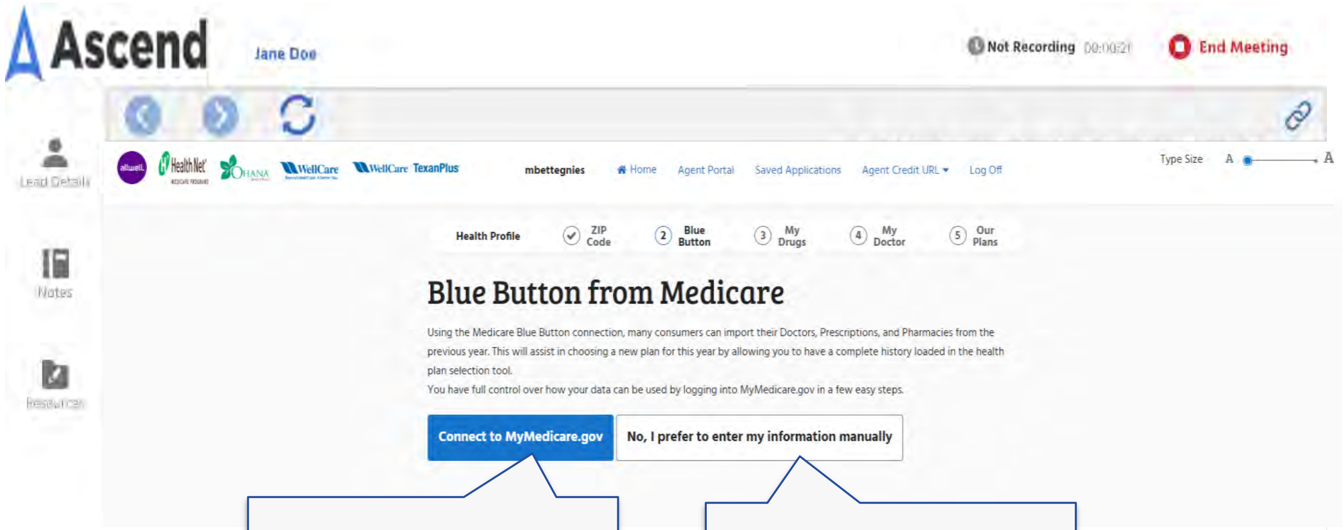
- Centers for Medicare and Medicaid Services (CMS) initiative to expand access to health information and improve the seamless exchange of data in healthcare – PROMOTE INTEROPERABILITY by giving patients access to their data

- **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

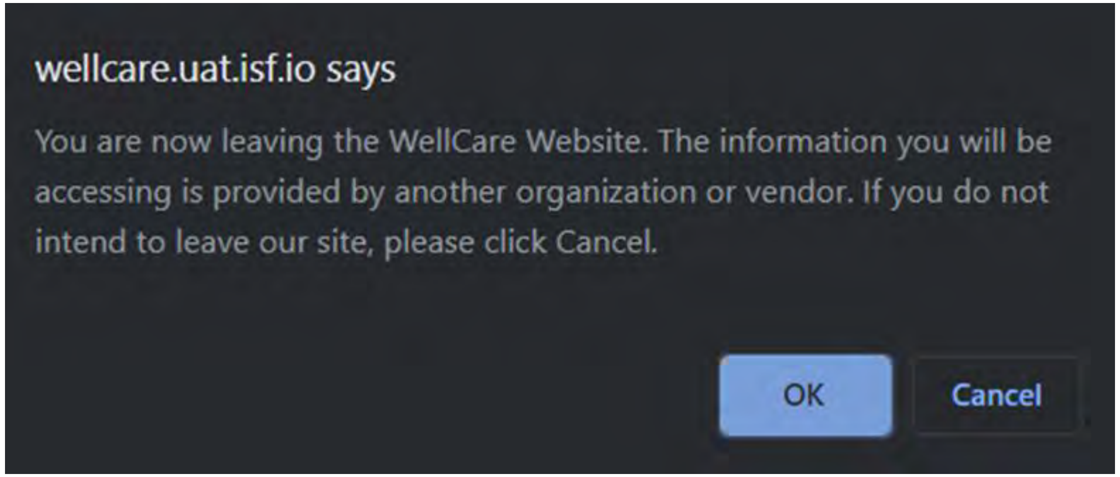


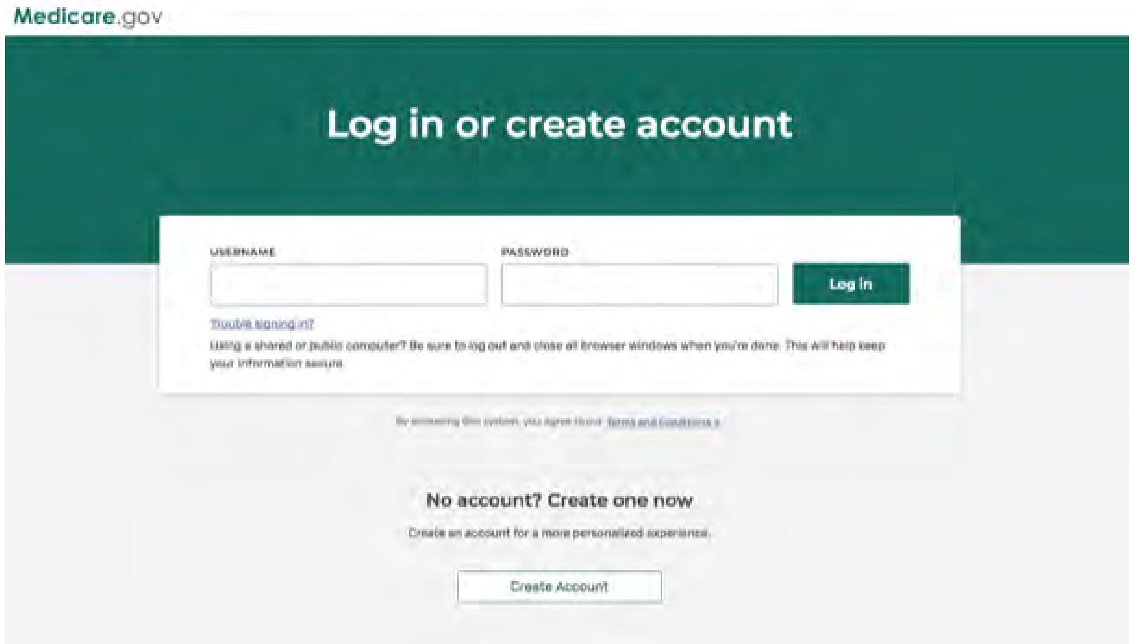
Will take you to MyMedicare.gov

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.)





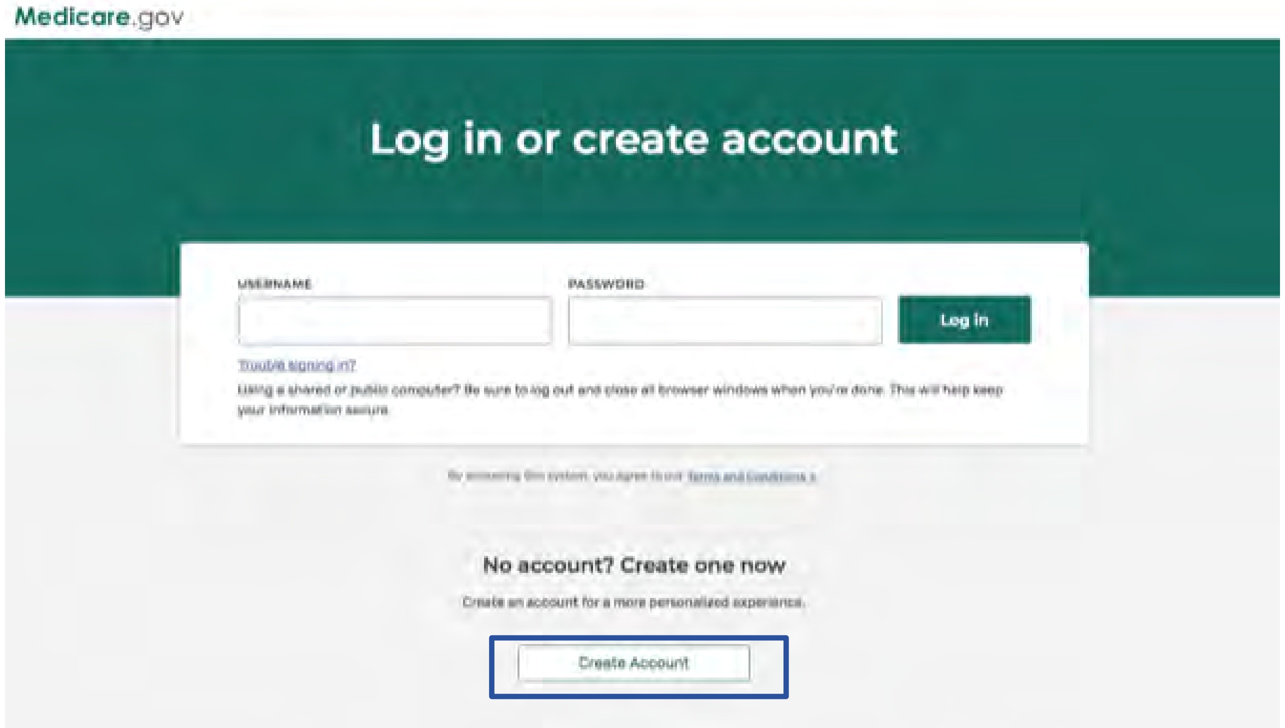
A pop-up box will appear notifying the user that they are being directed to Mymedicare.gov

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



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:

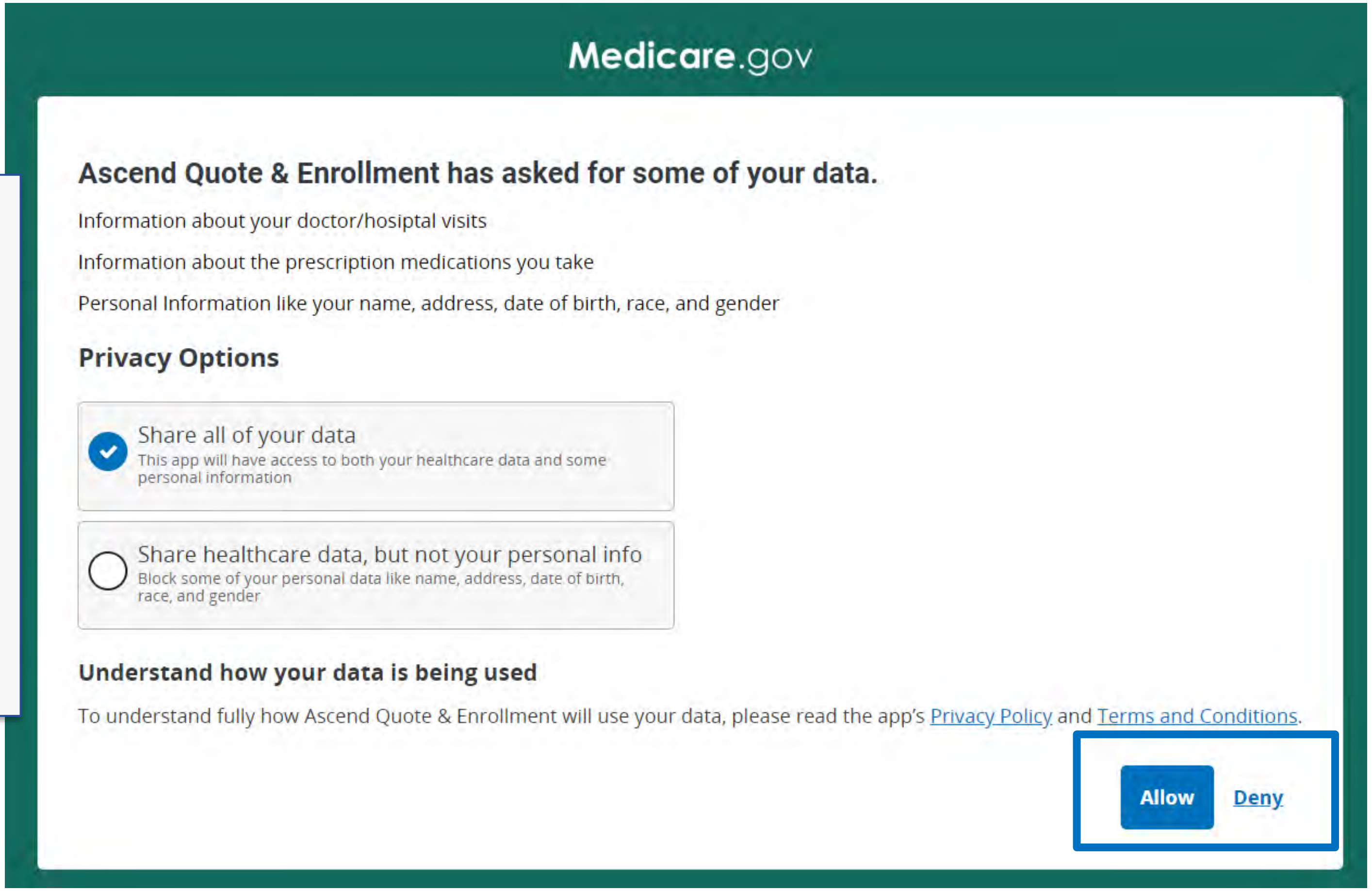
You have the right to share your health information, but there may be risks. Be sure to review the app's Privacy Policy and Terms and Conditions. You can revoke an app's access to your data at any time by logging in to your MyMedicare.gov account or calling us at 1-800-633-4227.

Allow **Deny**

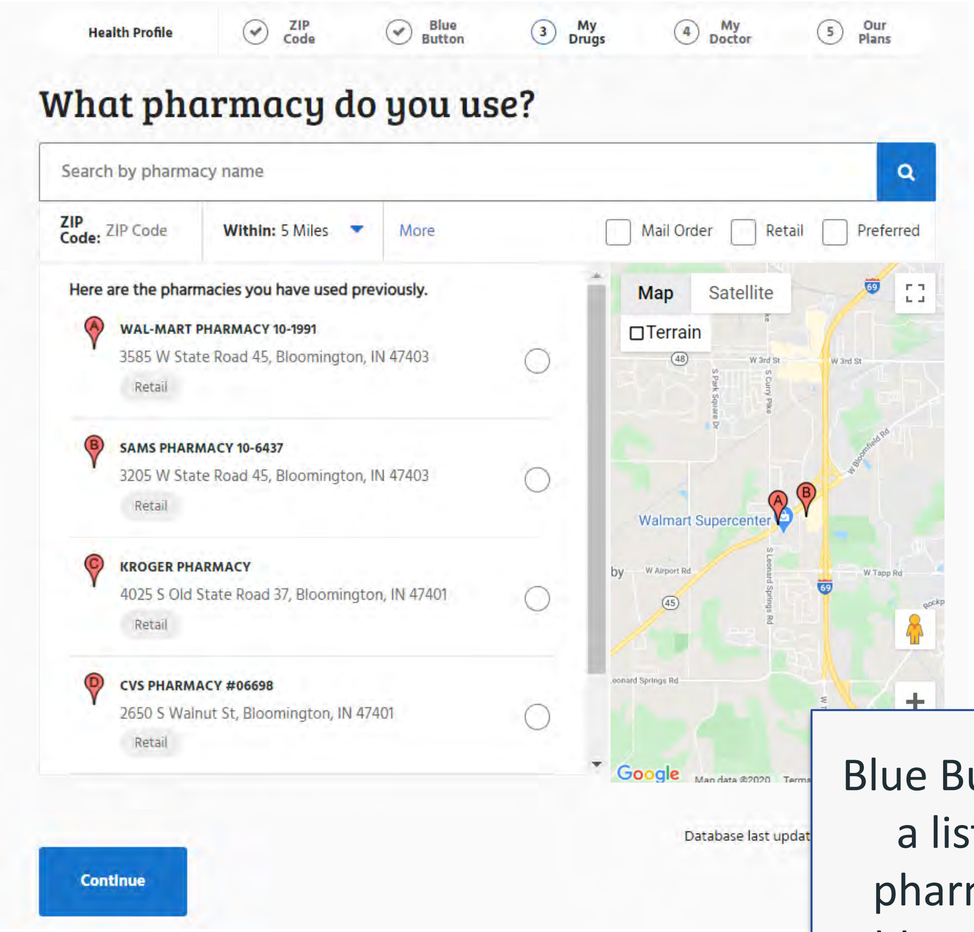
Once they have read the statement, the beneficiary can select 'Allow' to give Mymedicare.gov access to their information or they can click 'Deny' if they wish to withhold the information

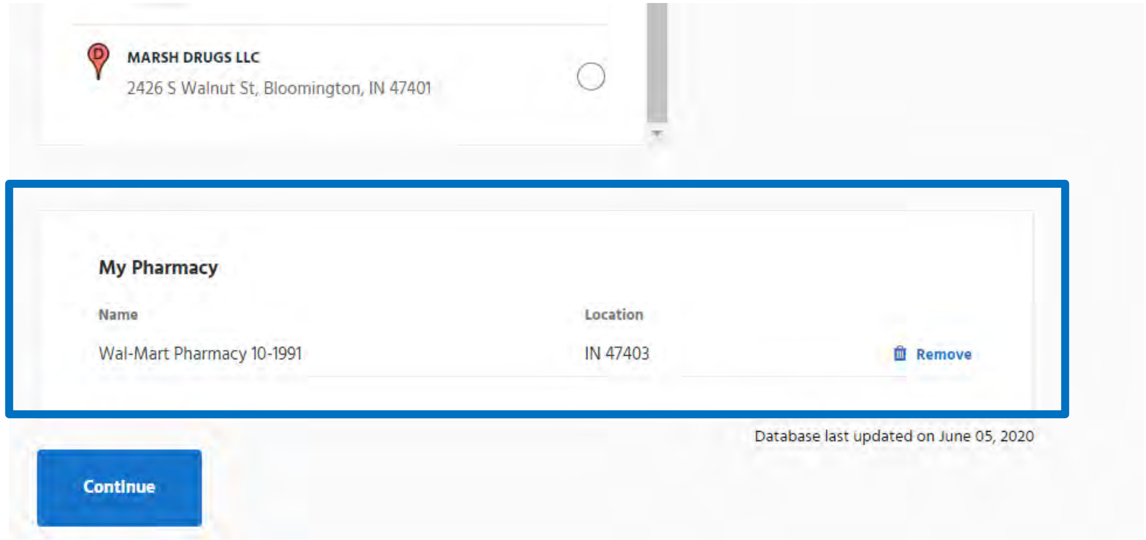
Permission to Access Medicare Data

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



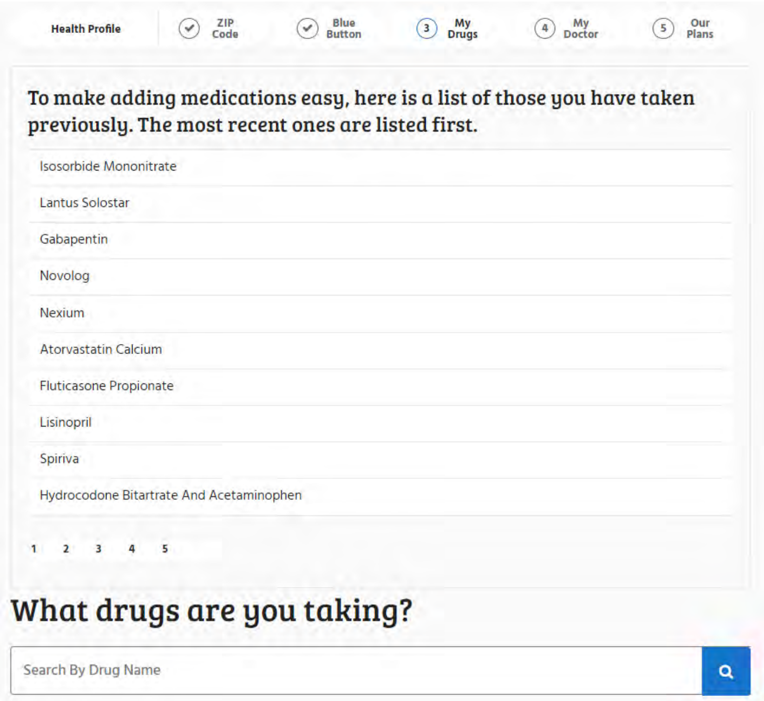
Adding pharmacy

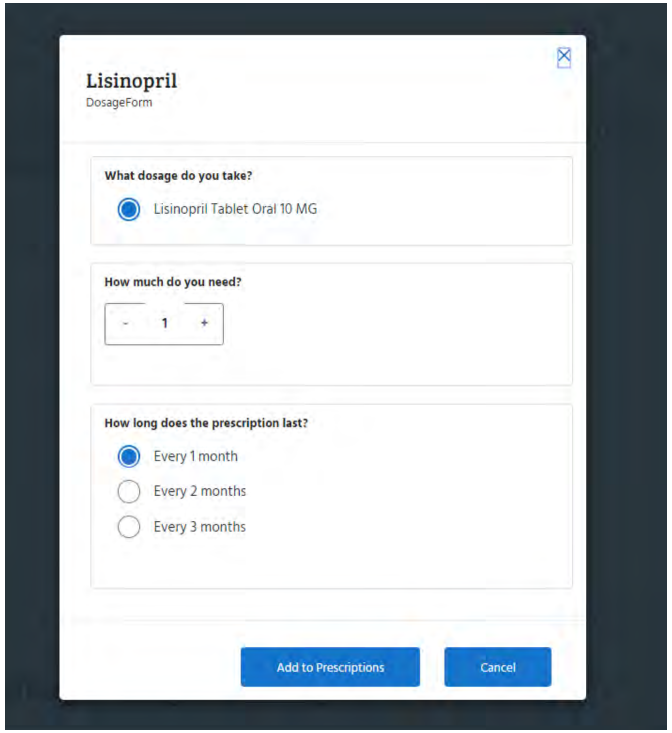


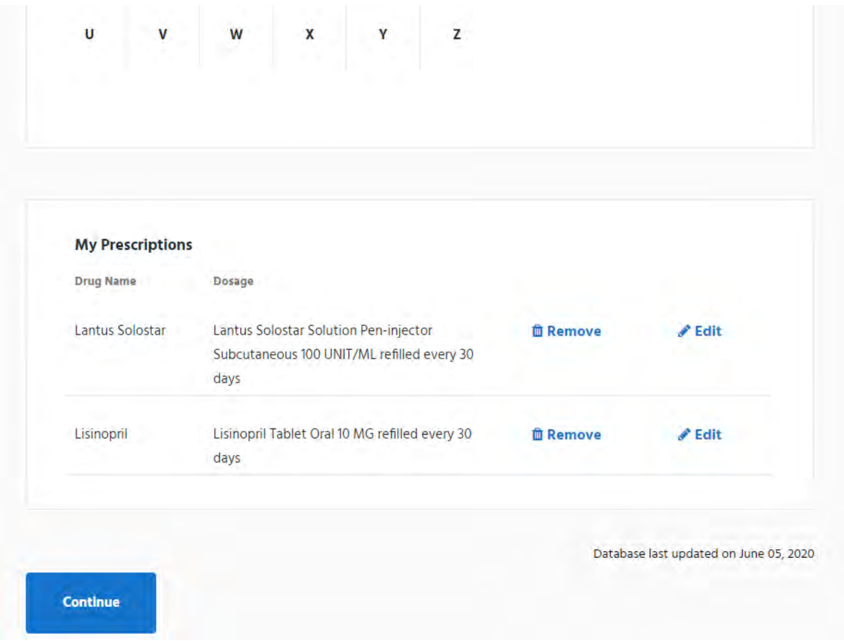


Blue Button 2.0 will populate a list of previously used pharmacies. Select one to add to the quoting process or search for one manually

Adding drugs



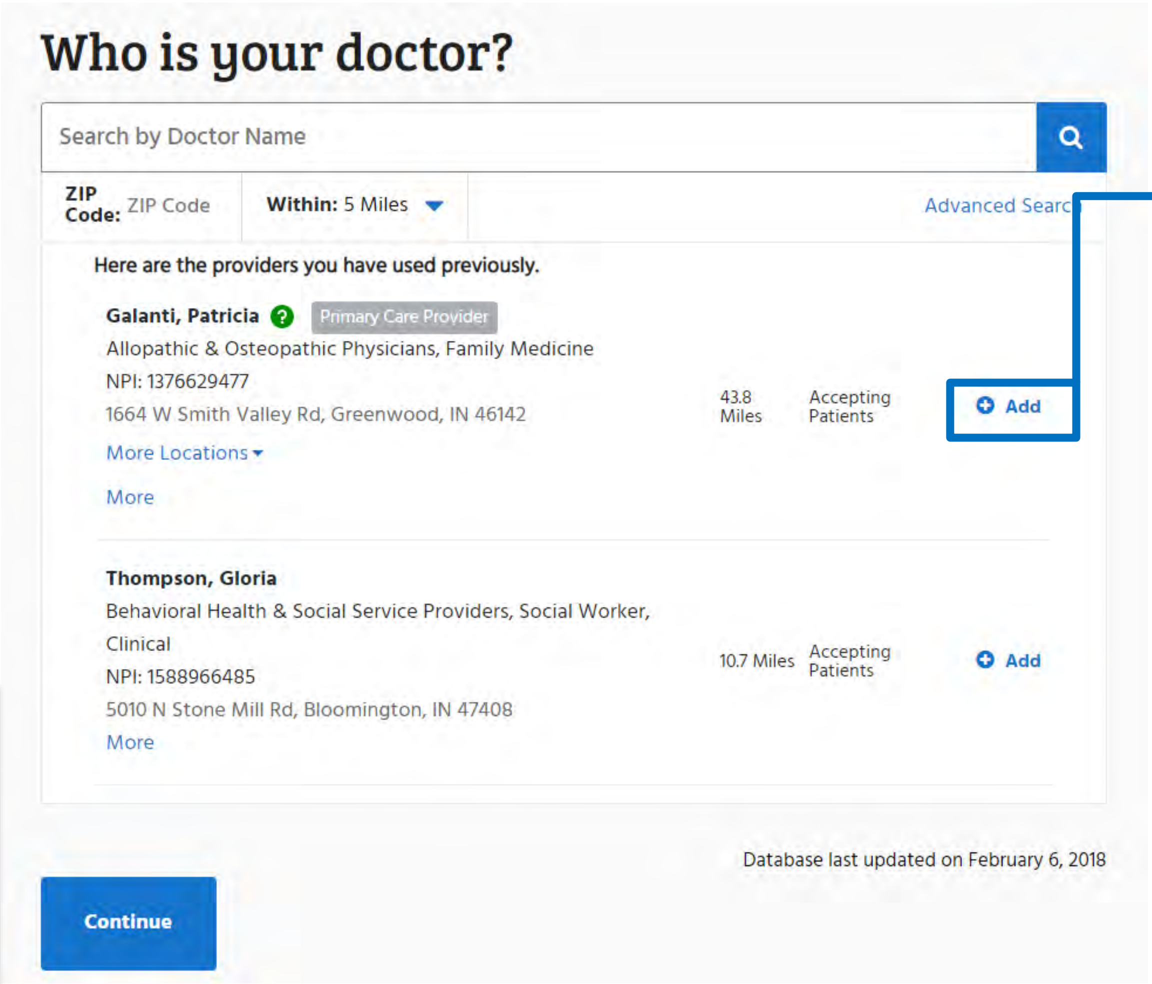




Blue Button 2.0 will populate a list of previously prescribed medications. By clicking on one, you will be able to select the dosage and frequency to add to the Medicine Cabinet.

Adding Doctors

The ability to search for doctors will follow the normal flow



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

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

Adding Doctors (cont.)

My Doctor

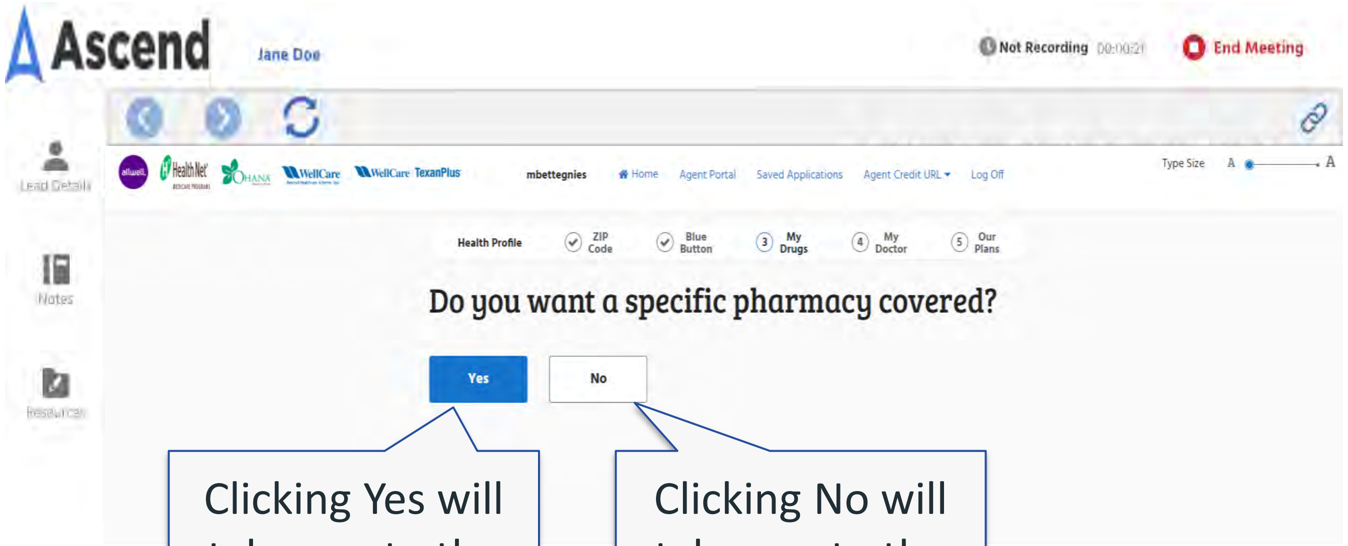
	Name	Type of Specialist	Location		
Selected PCP	Galanti, Patricia	Allopathic & Osteopathic Physicians, Family Medicine	IN 46142	Edit	Remove

Database last updated on February 6, 2018

Continue

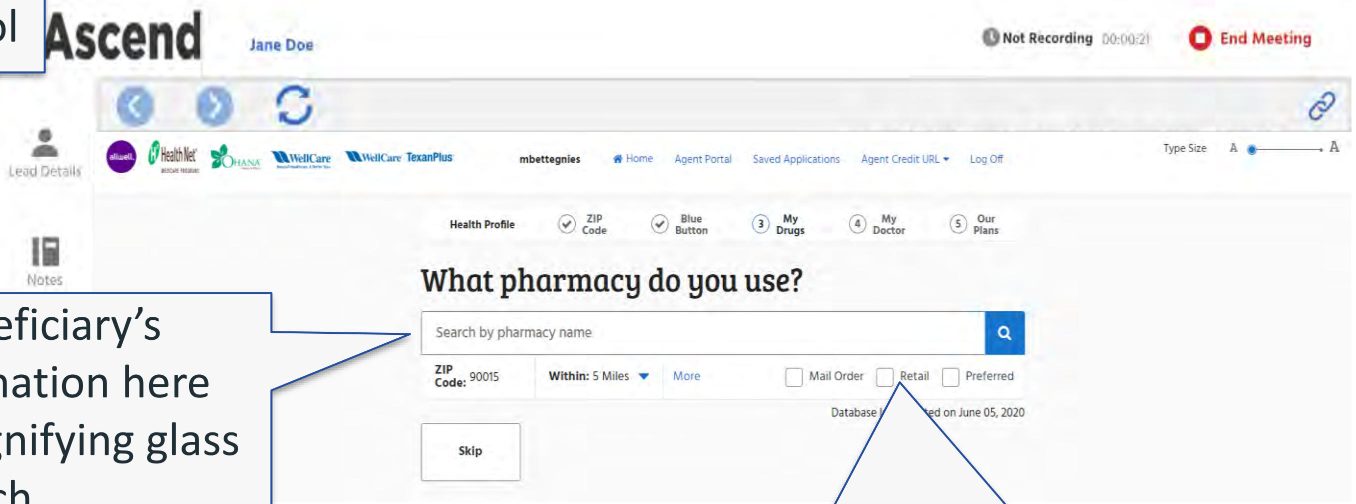
After 'Adding' a doctor, you will notice that the PCP has been added to the shopping tool to populate on the application

Pharmacy Search
Manual Entry



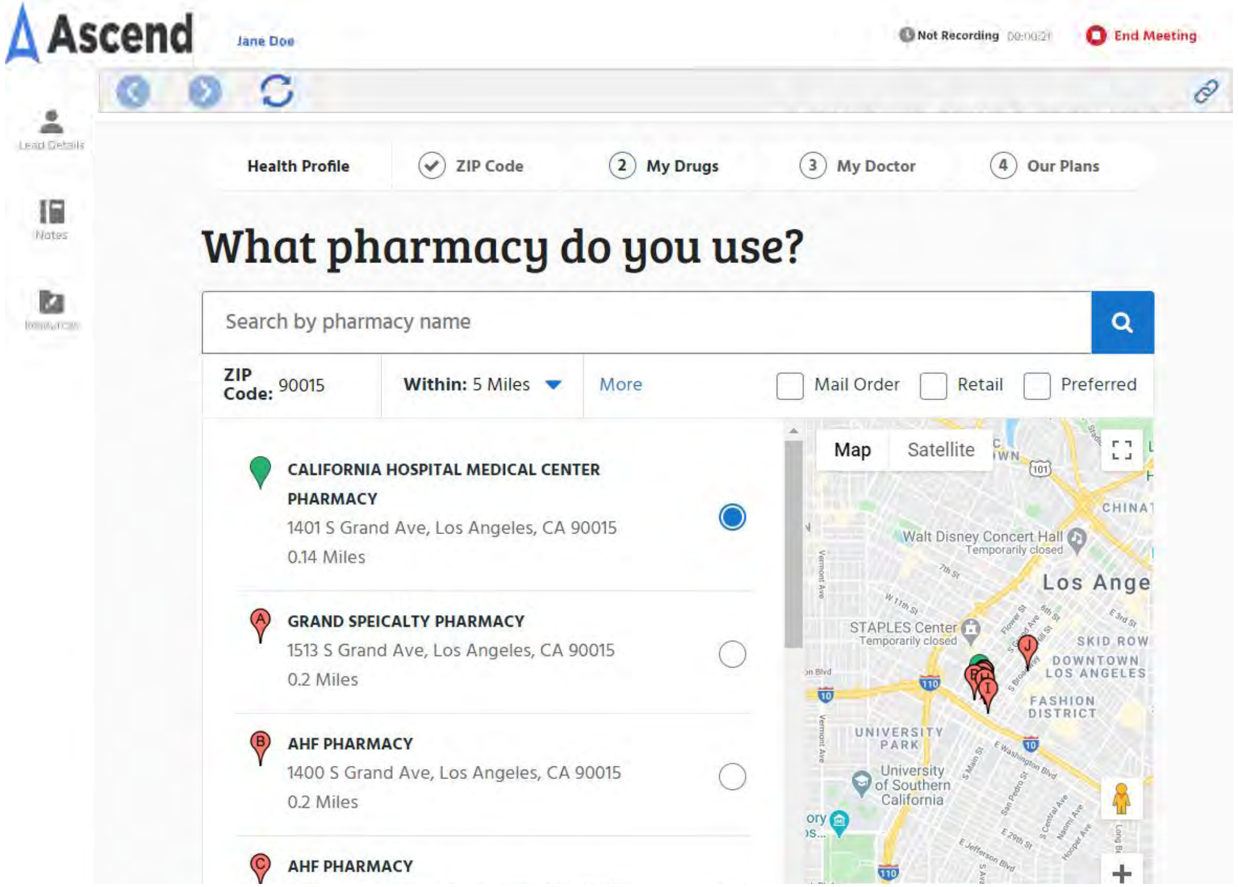
Clicking Yes will take you to the lookup tool

Clicking No will take you to the next lookup tool



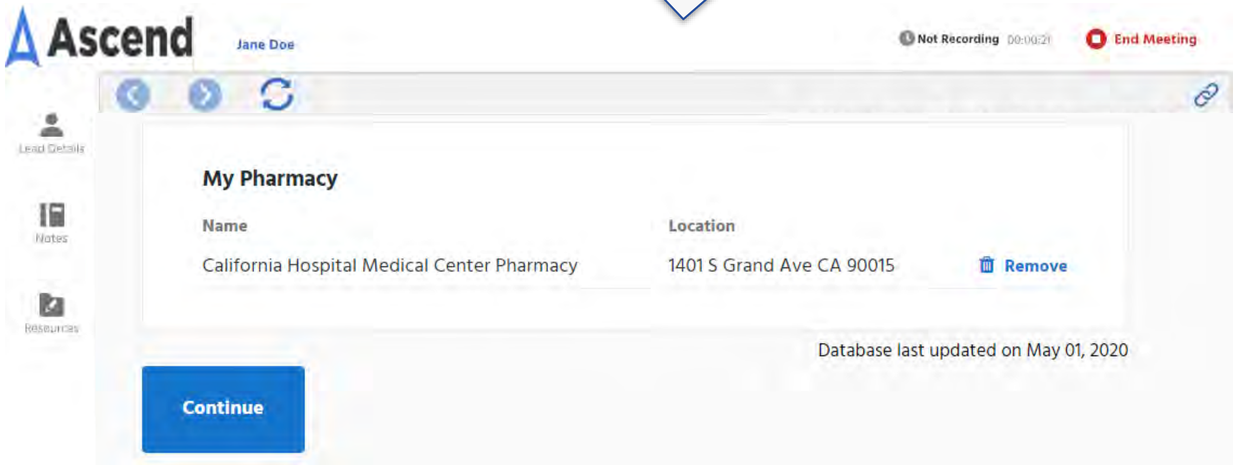
Enter the beneficiary's pharmacy information here then click the magnifying glass to search

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

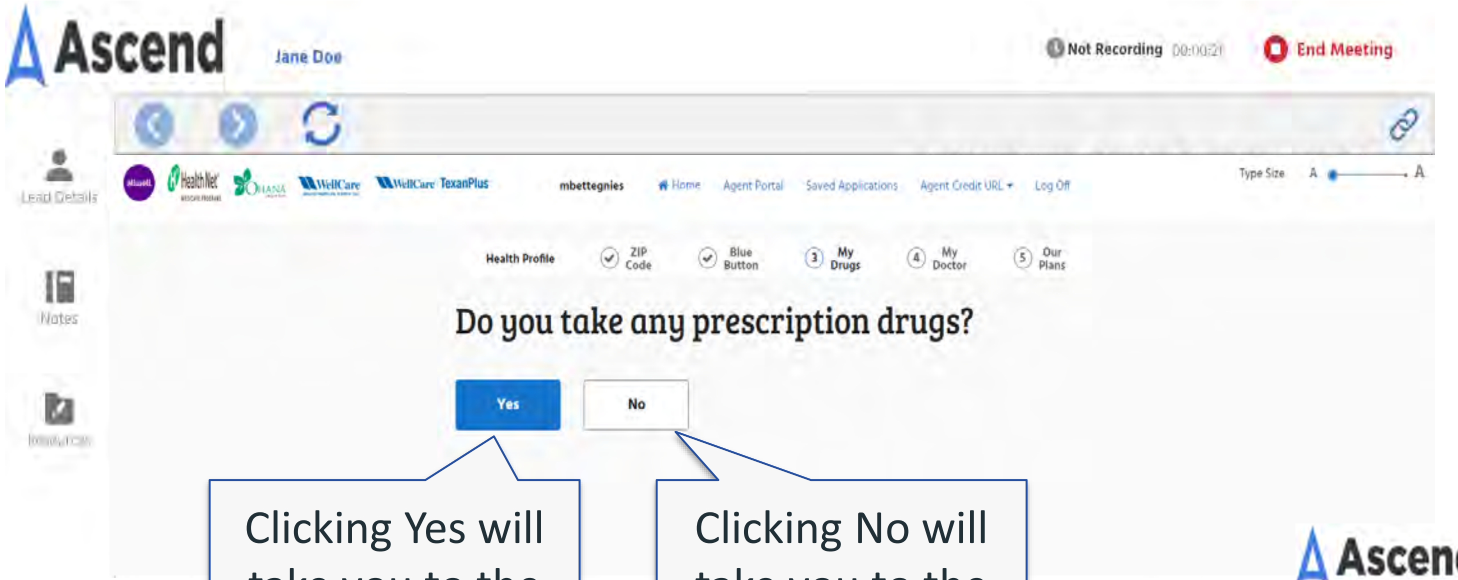


A list of pharmacies in the area will populate. Select which one you would like to use by clicking on the circle next to it.

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



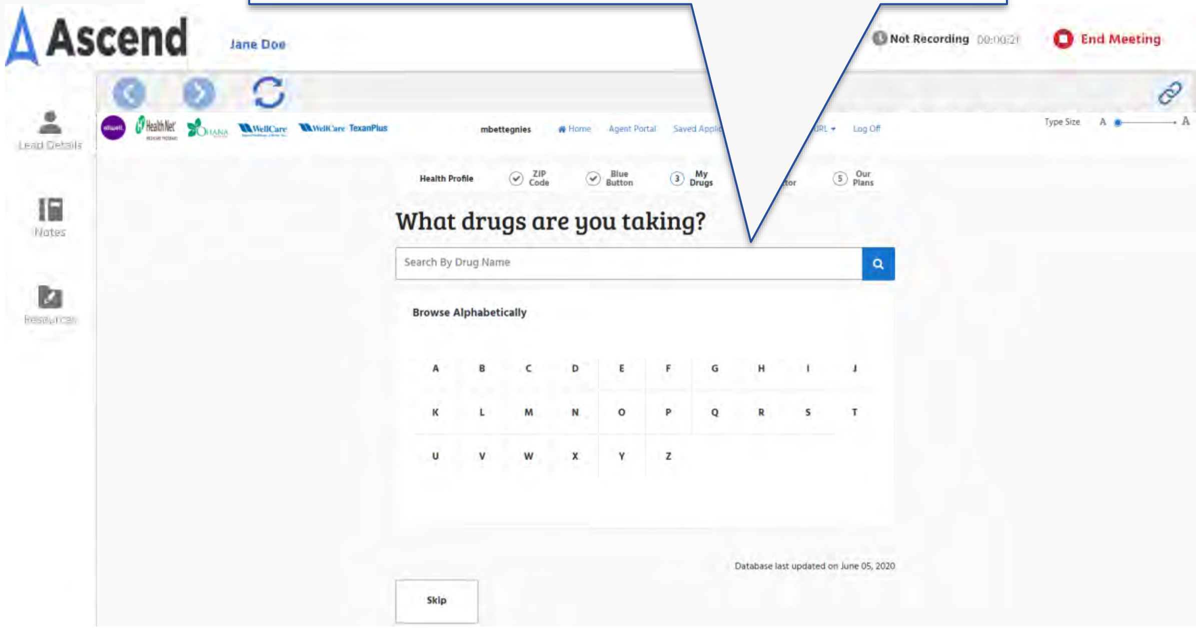
Formulary Search
Manual Entry

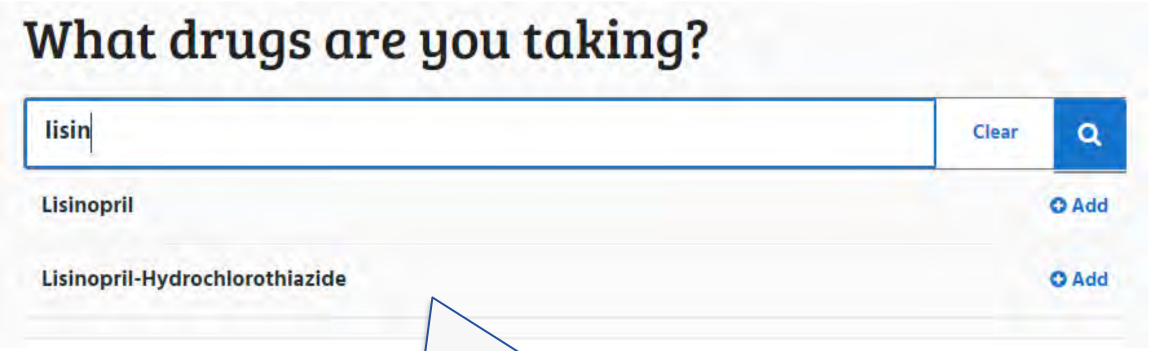


Clicking Yes will take you to the lookup tool

Clicking No will take you to the next lookup tool

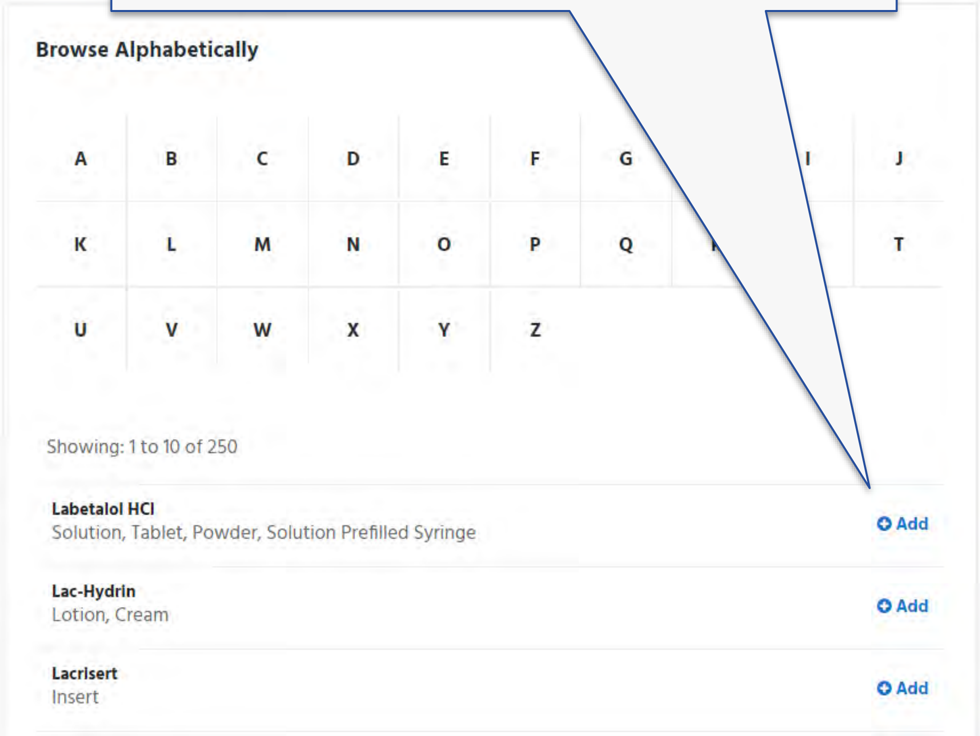
Search formularies by typing the formulary in the box or by selecting the first letter of the formulary from the alphabet below

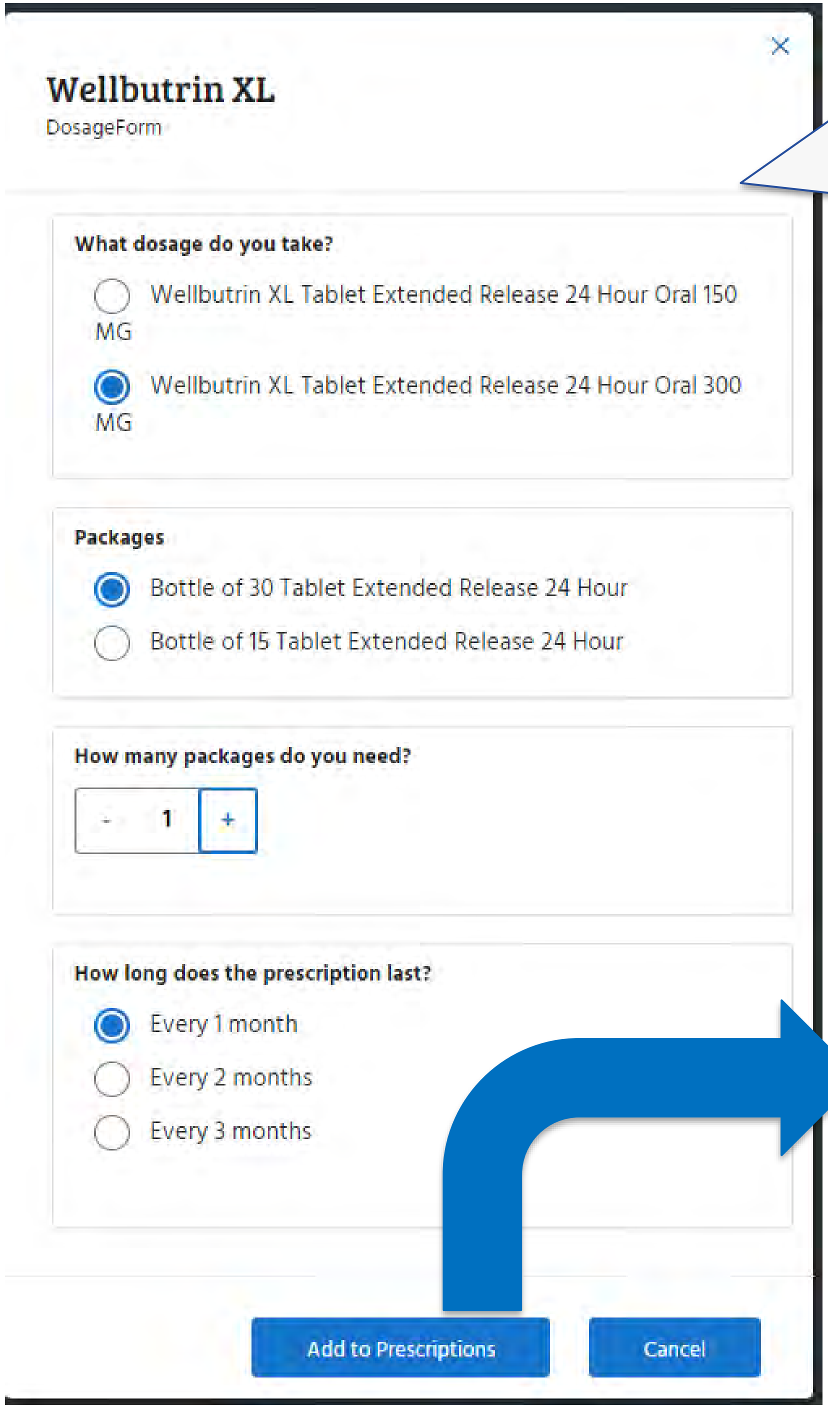




A drop-down list of suggested formularies will populate if you start typing in the search box. If you select one from the list, you will be taken directly to the Drug Details screen

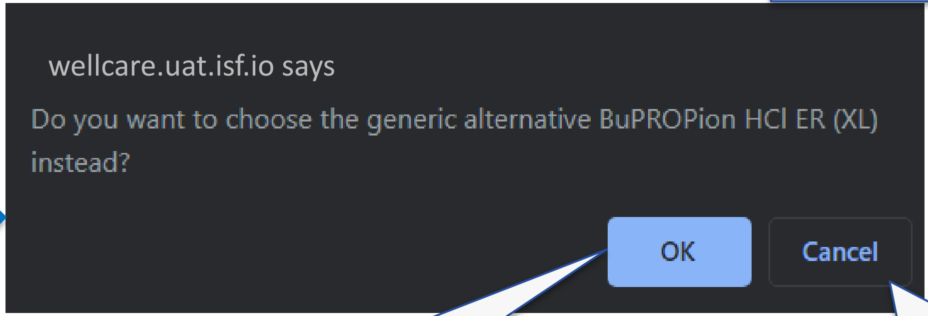
If you search by the first letter of the formulary, you will be taken to a list of all formularies that start with that letter. Scroll through the list until you find you formulary you are searching for. Once you found it, click 'Add to Medicine Cabinet' to be taken to the Drug Details screen





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.

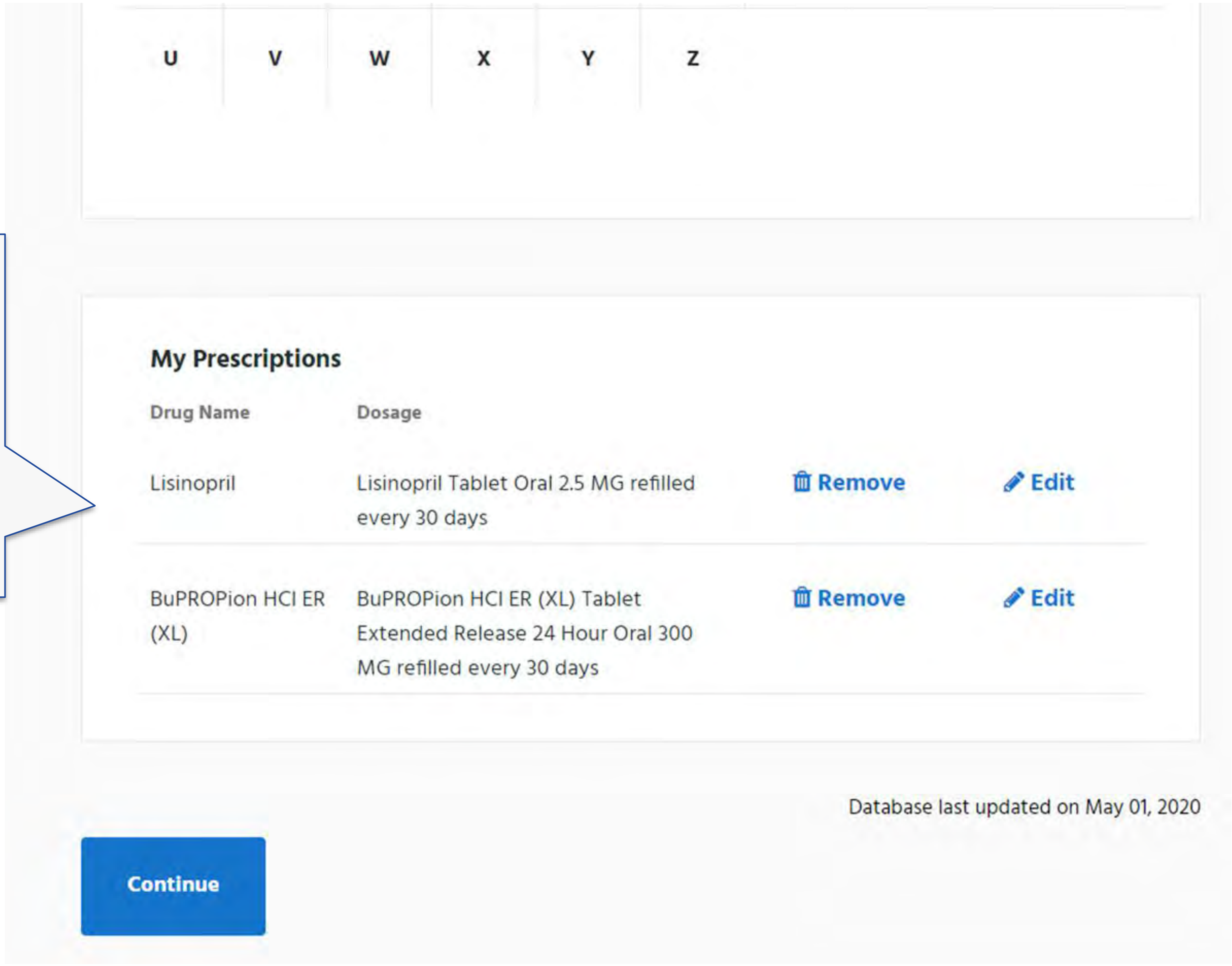
If a generic alternative is available for the medication, a pop-up box will appear with the generic medication.



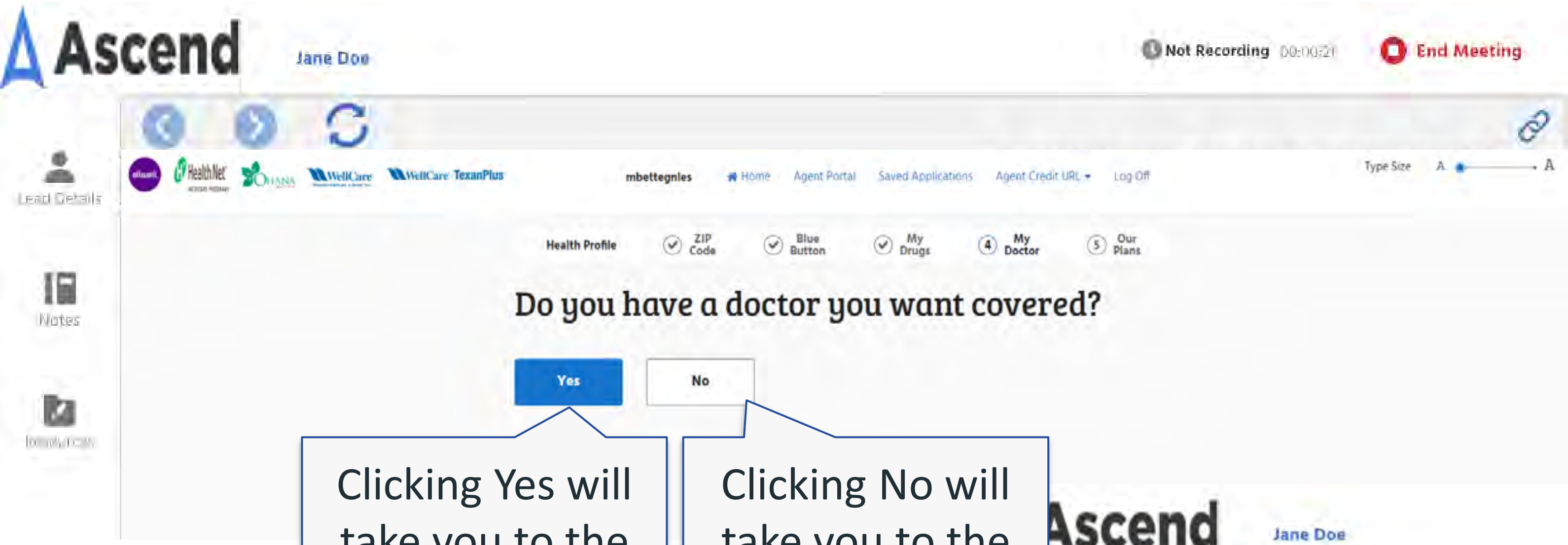
Clicking Ok will add the generic alternative.

Clicking Cancel will add the name brand.

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

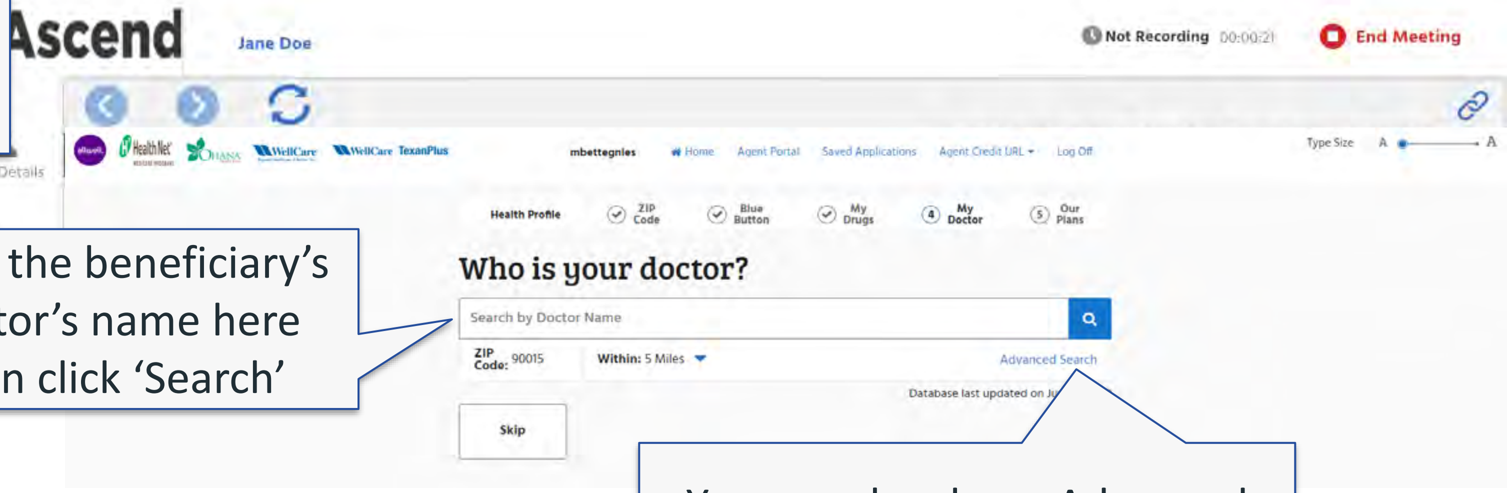


Doctor Search
Manual Entry



Clicking Yes will take you to the lookup tool

Clicking No will take you to the next lookup tool

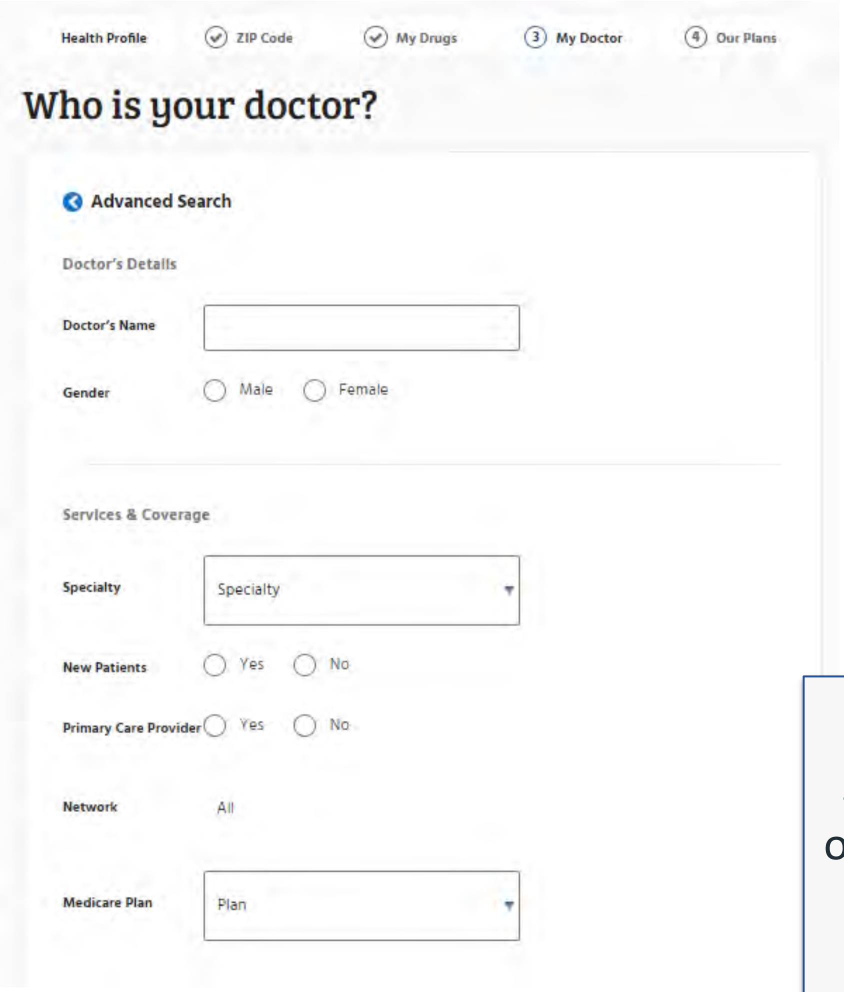


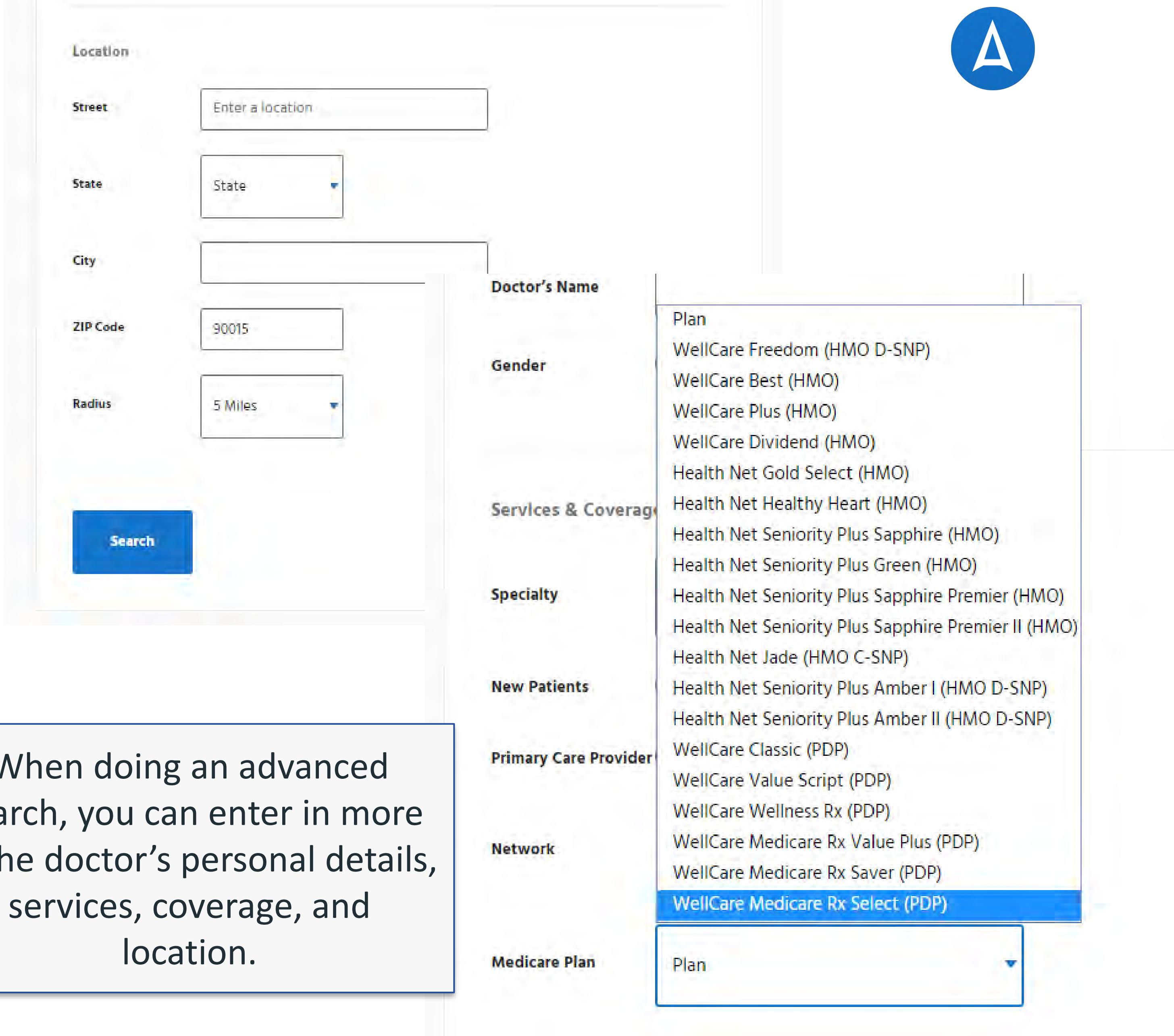
Enter the beneficiary's doctor's name here then click 'Search'

You can also do an Advanced Search by clicking here

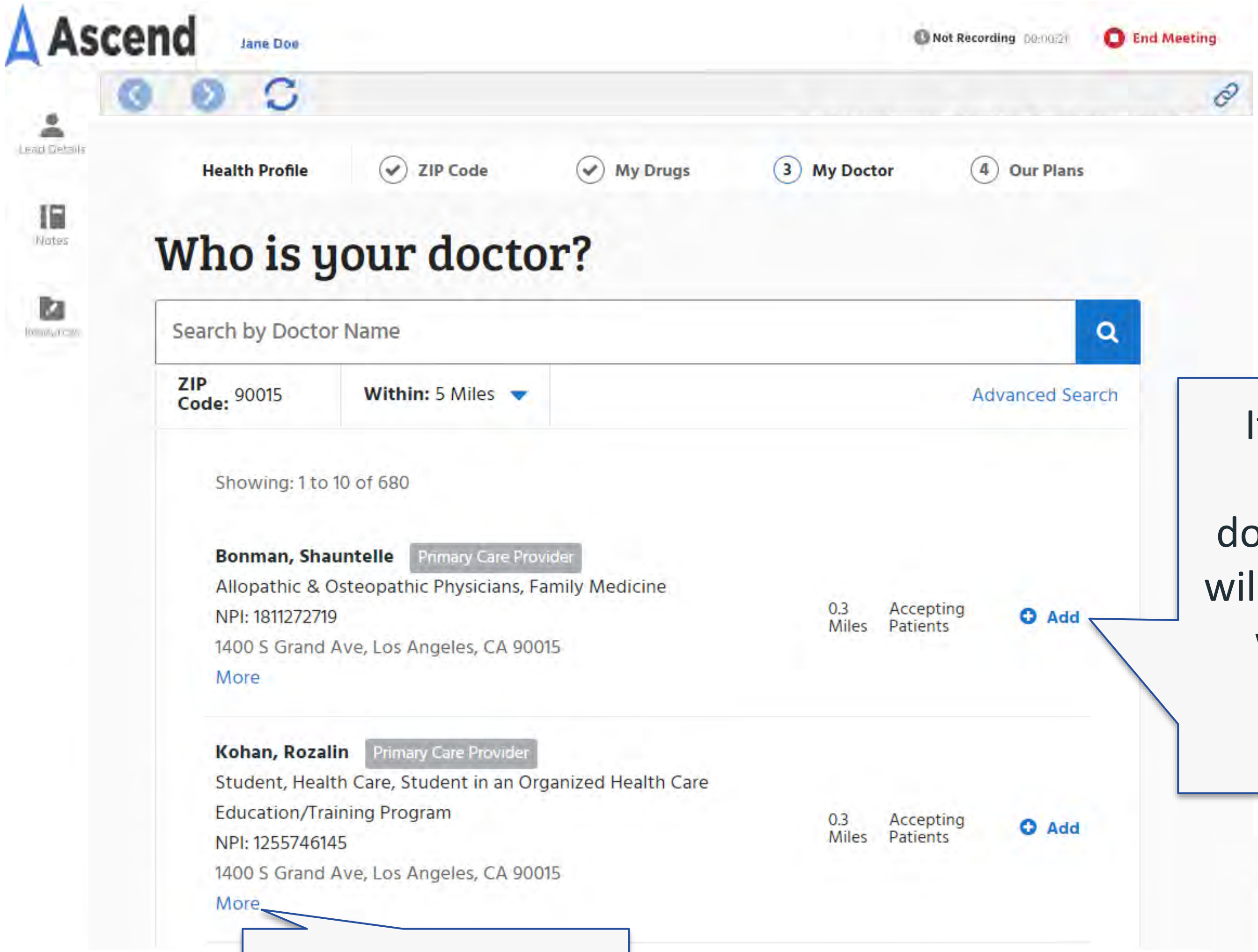
Note: HealthNet providers are ***NOT*** integrated with the tool.

Advanced Search





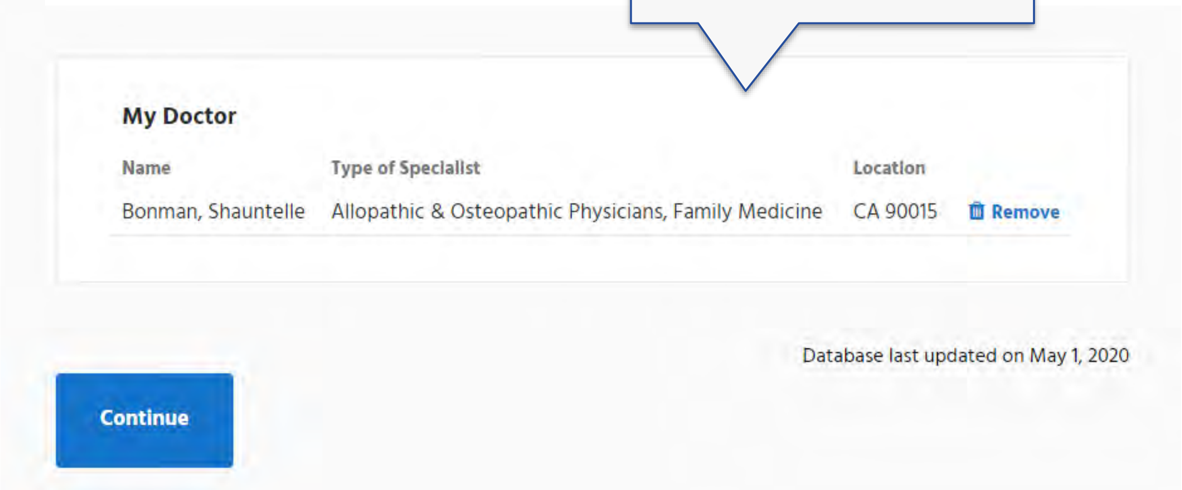
When doing an advanced search, you can enter in more of the doctor's personal details, services, coverage, and location.



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



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)

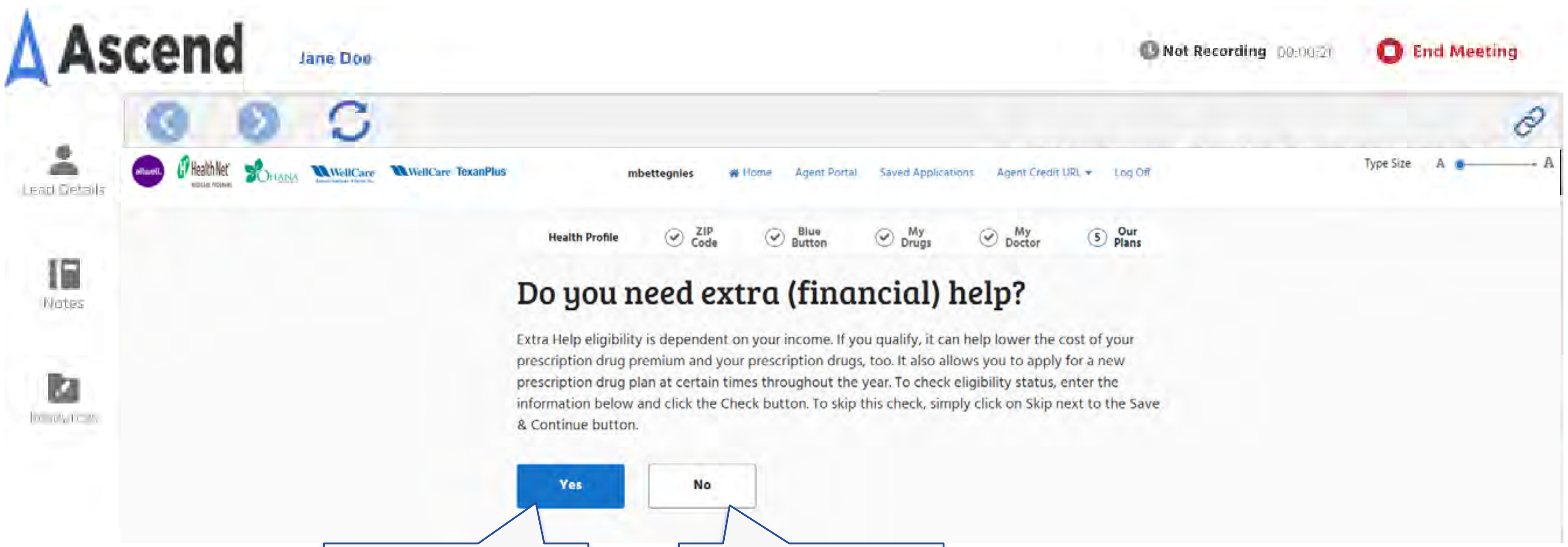
WellCare Freedom (HMO D-SNP)

WellCare Plus (HMO)

Add to My Doctors

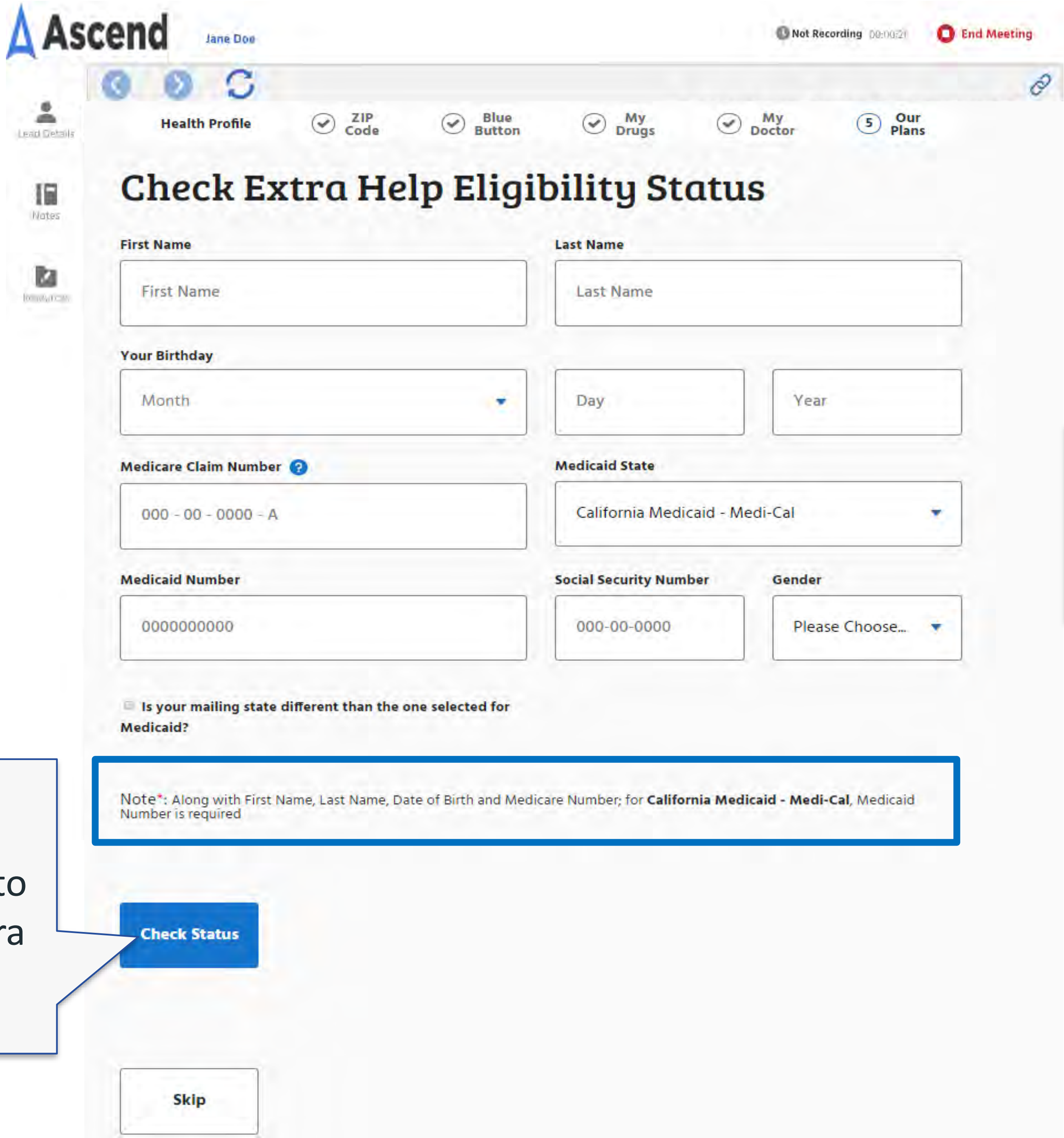
On the Doctor Details screen, you will see more information about the doctor, office location and hours, and plans accepted within the zip code provided.

Extra Help/LIS Check
+
Medicaid Verification



Clicking Yes will take you to the verification tool

Clicking No will take you to the Quotes page



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

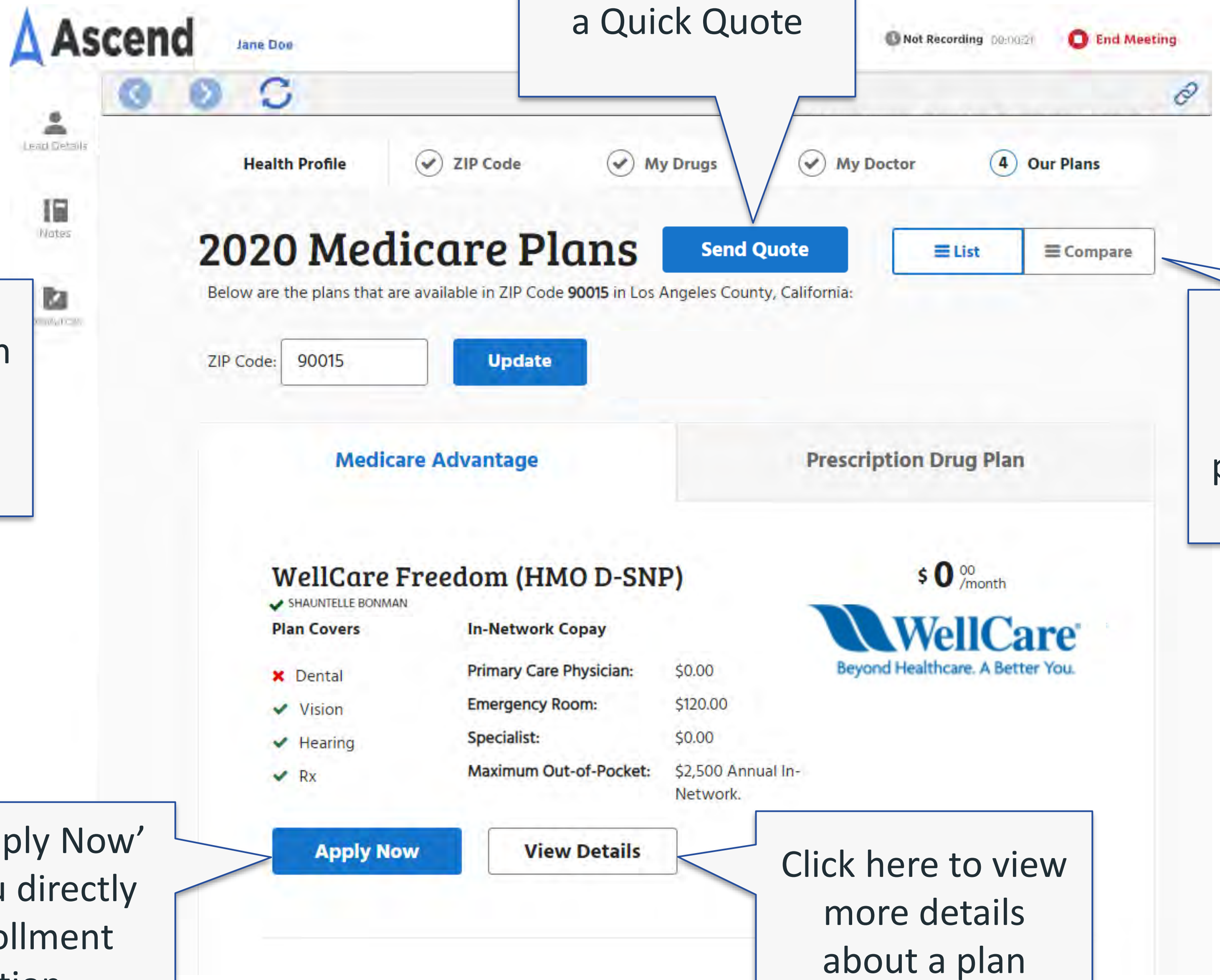
Enter the beneficiary's Medicare Number, Last Name, and Date of Birth to see if they qualify for Extra Help. Then click 'Check Status'.

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

SELECTING A PLAN – QUOTES PAGE

Click here to send a Quick Quote

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



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

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

Beyond Healthcare. A Better You.

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.

Fitness	Free membership at participating fitness facilities. Also access to online wellness related tools, planners, newsletters and classes.
Hearing Aid Coverage	$2000.00 both ears combined. See the Evidence of Coverage.
Eyewear Coverage	$350.00 every year. See the Evidence of Coverage.
Dental Coverage	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

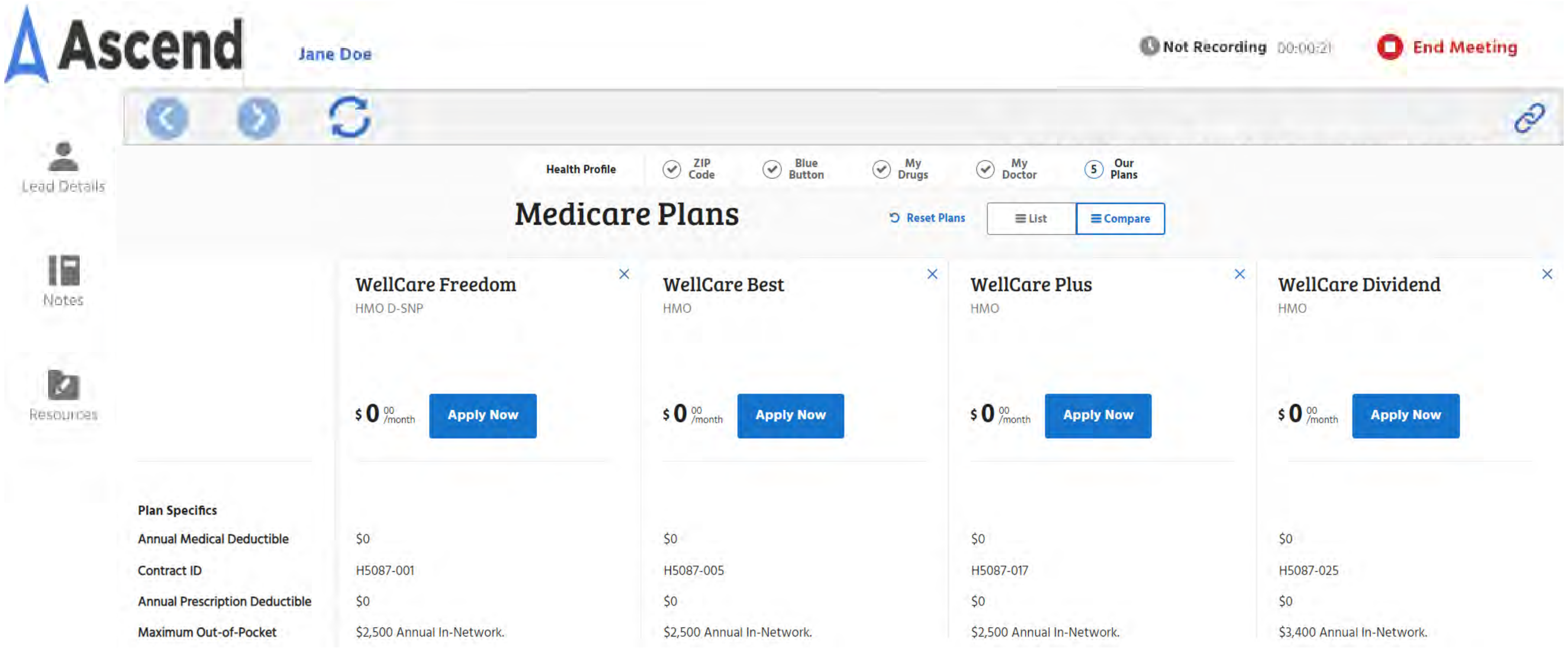
Summary of Benefits

Apply Now

Click here to start an enrollment

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

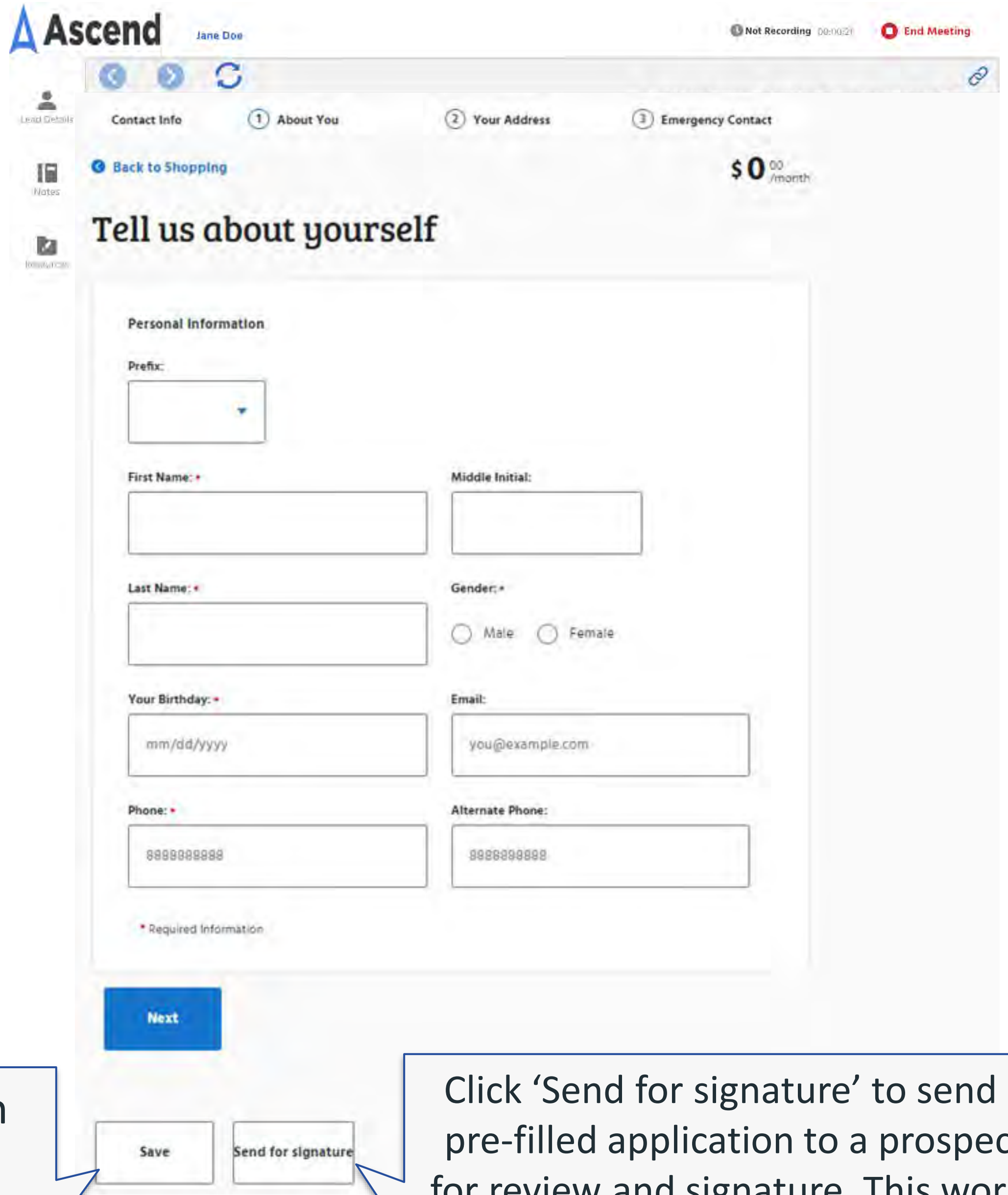
Plan Comparison



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.

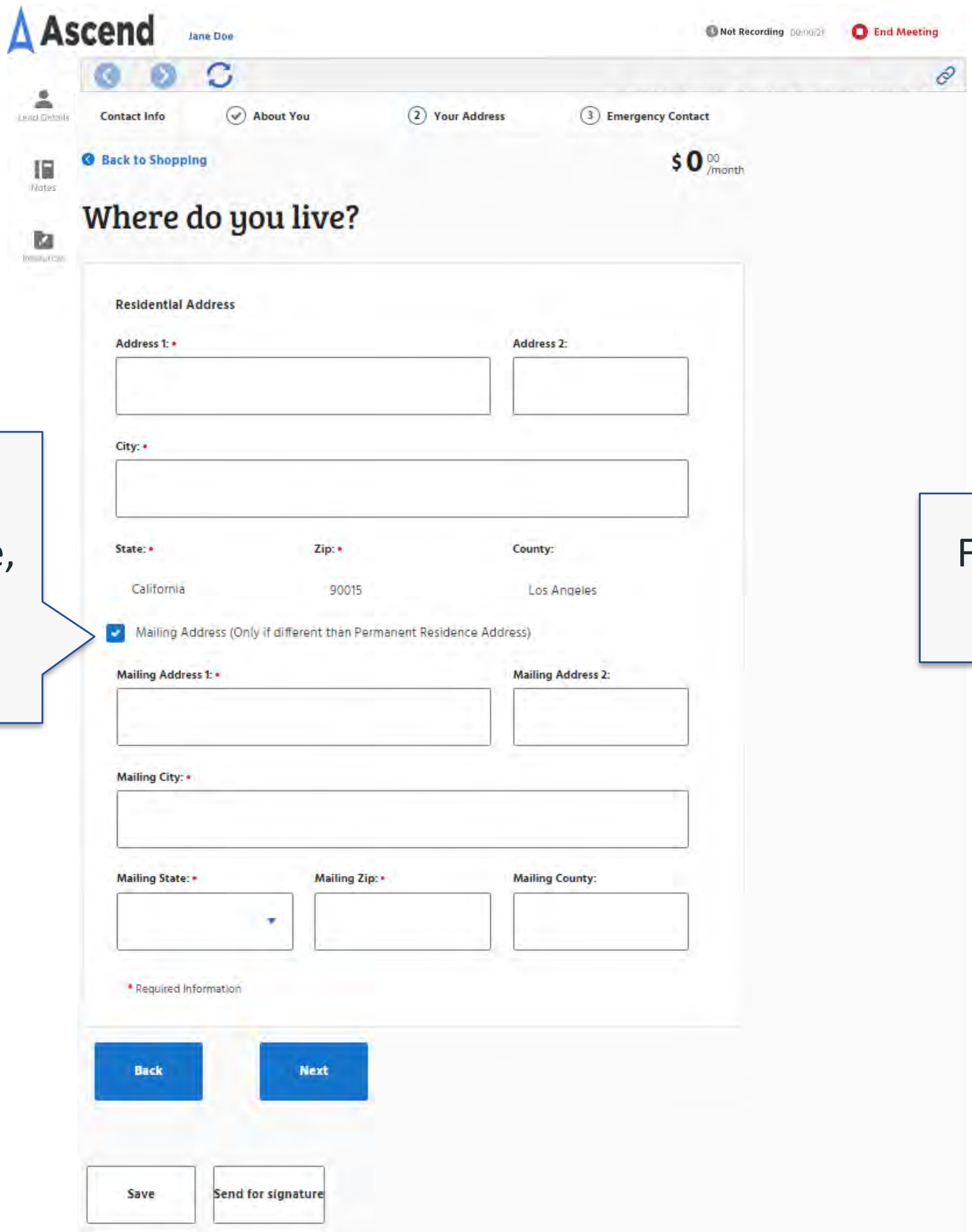


If the information is filled in for the lead in AMA, it will carry over to the application.

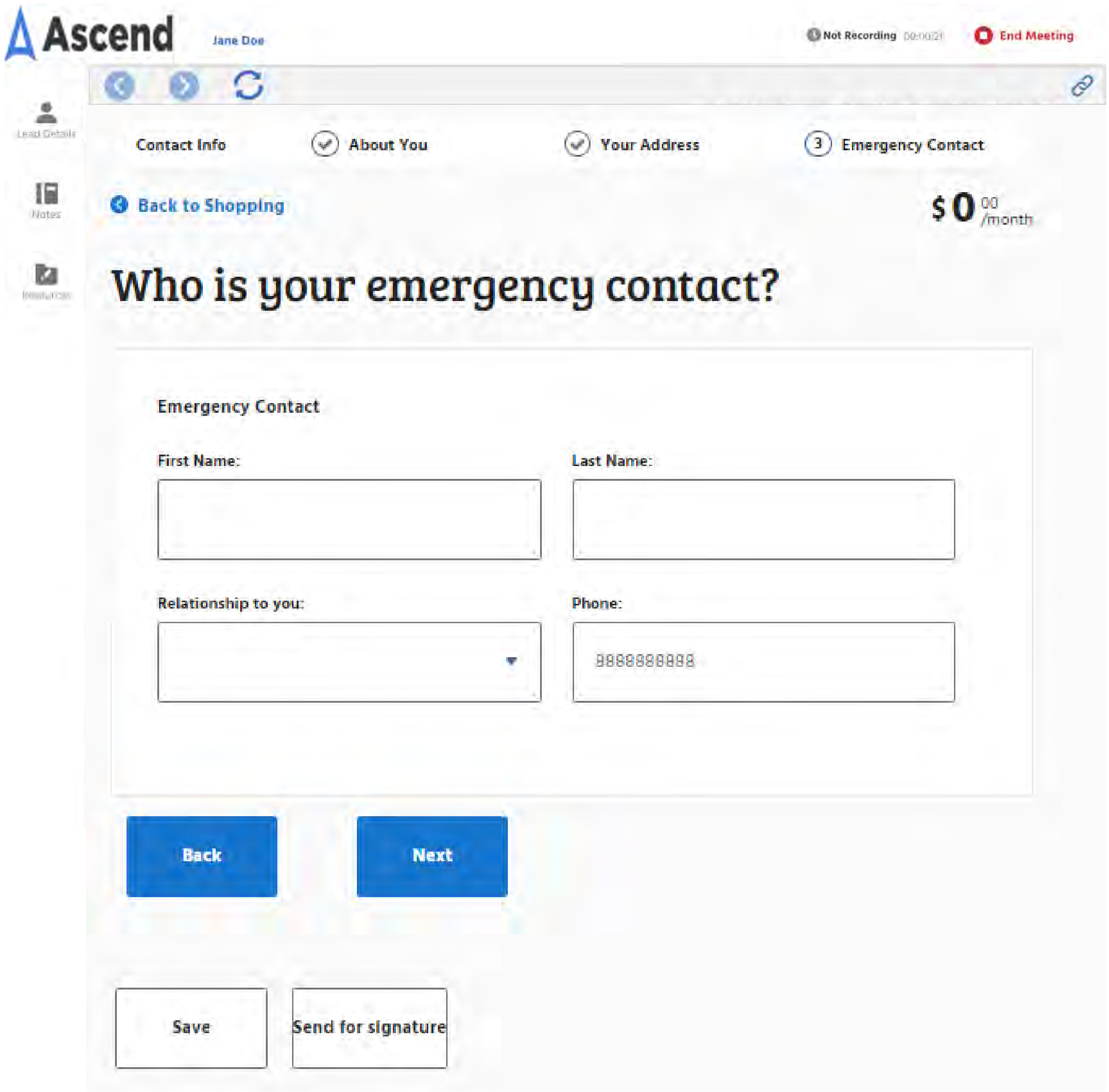
Click 'Save' to keep your progress in order to return to the enrollment application at a later time

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

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



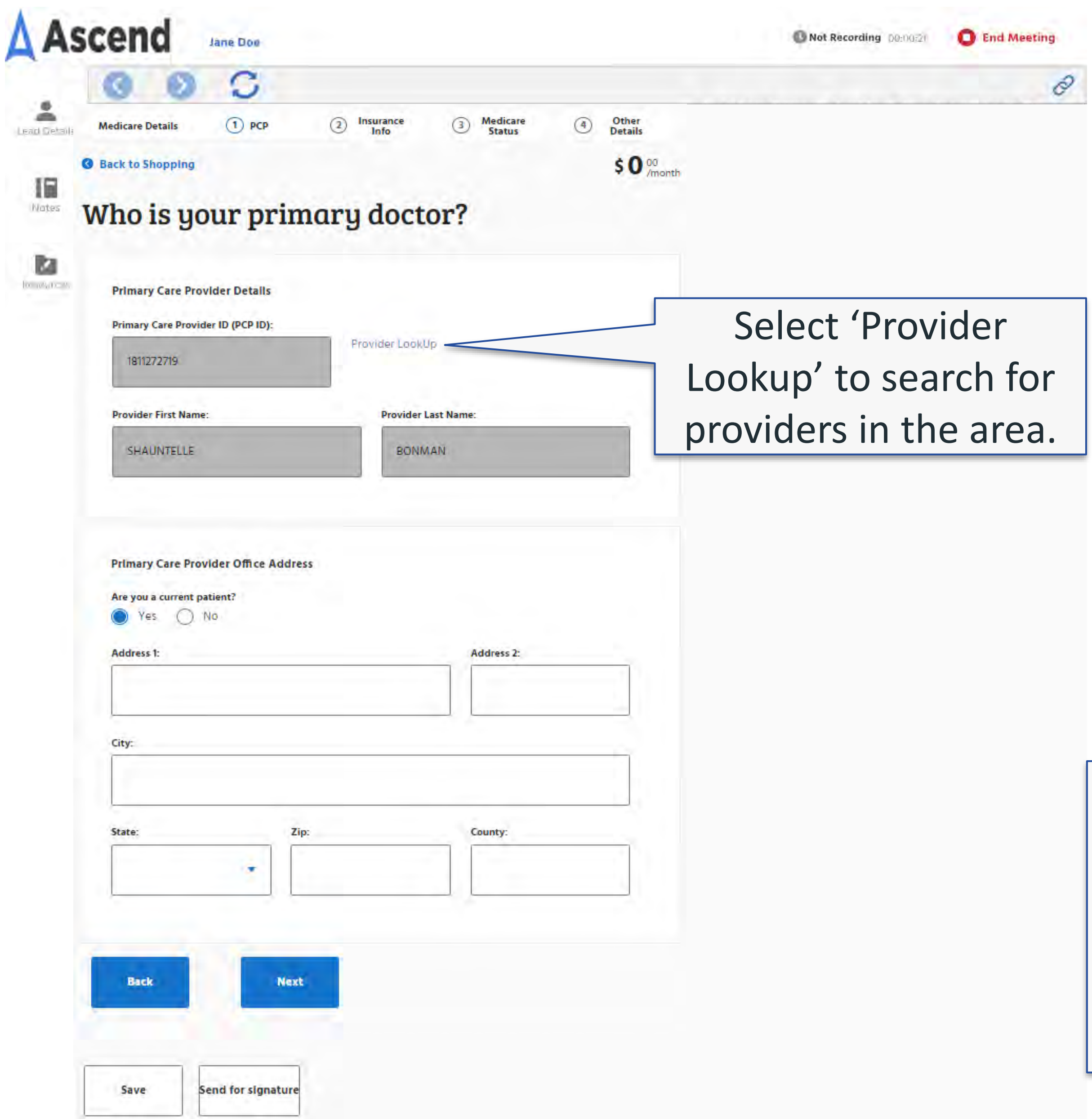
Fill in the form with the beneficiary's permanent residence address.



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.

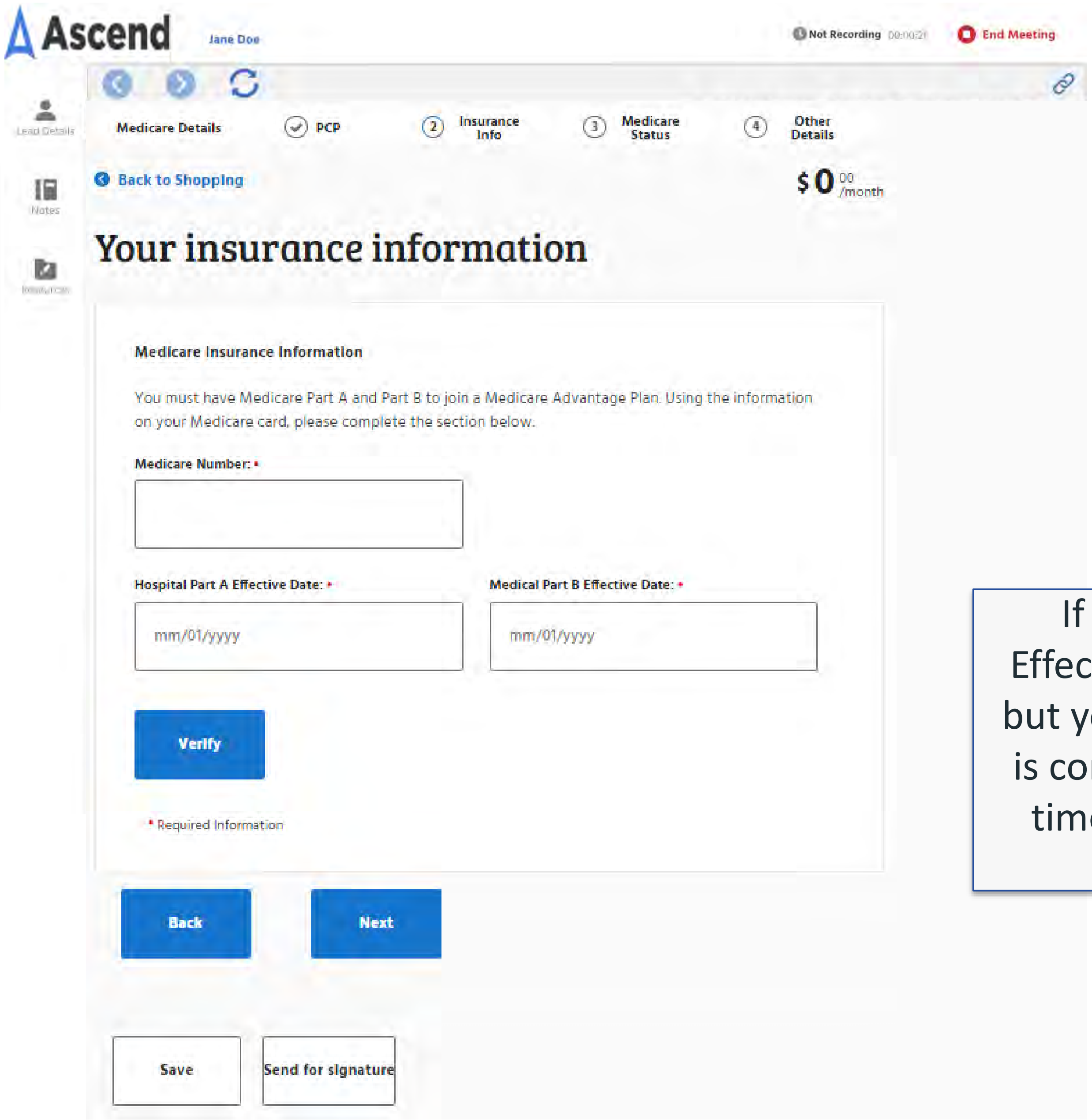
A provider selected during the shopping experience will carry over to the application.



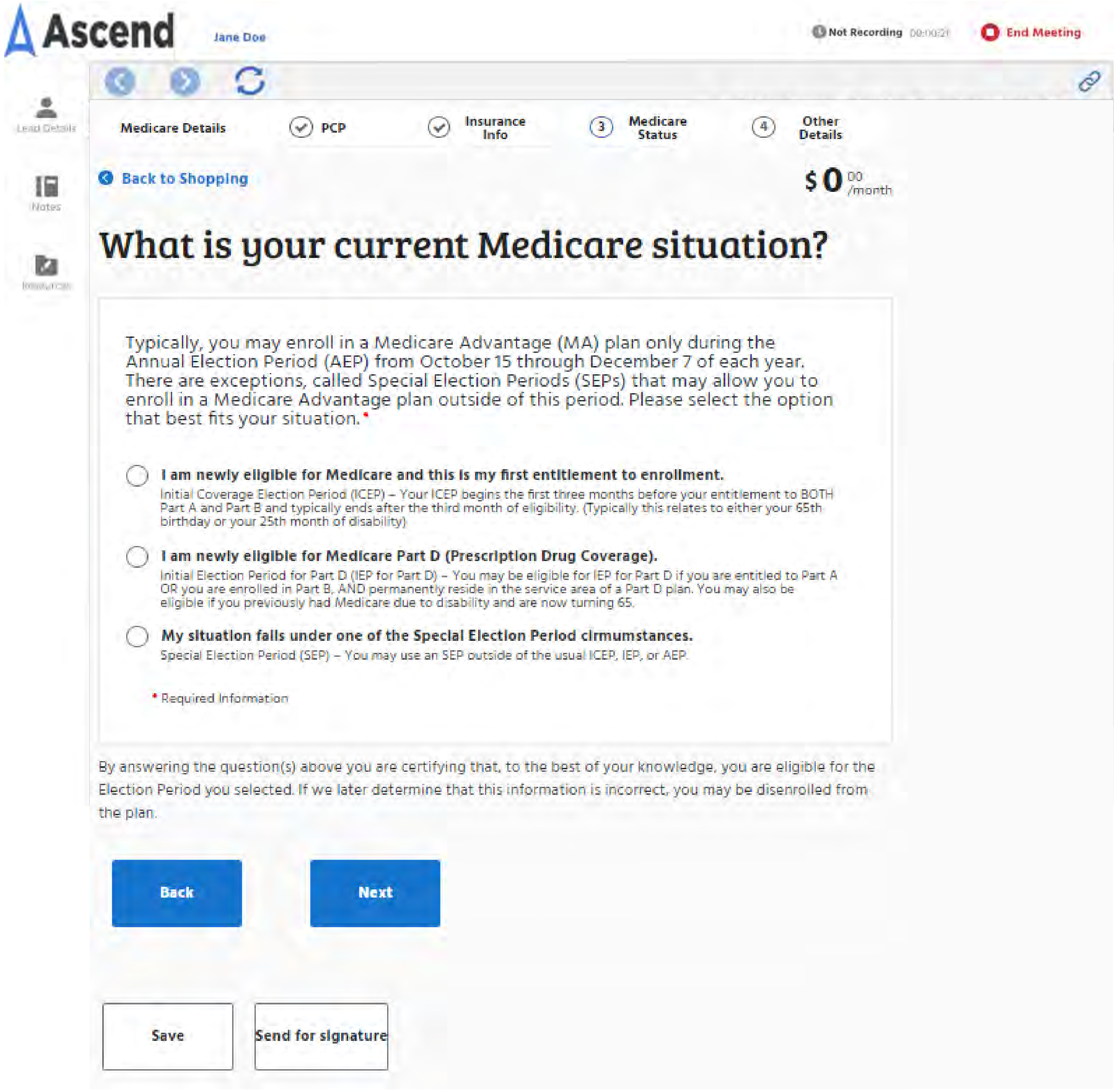
Select 'Provider Lookup' to search for providers in the area.

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

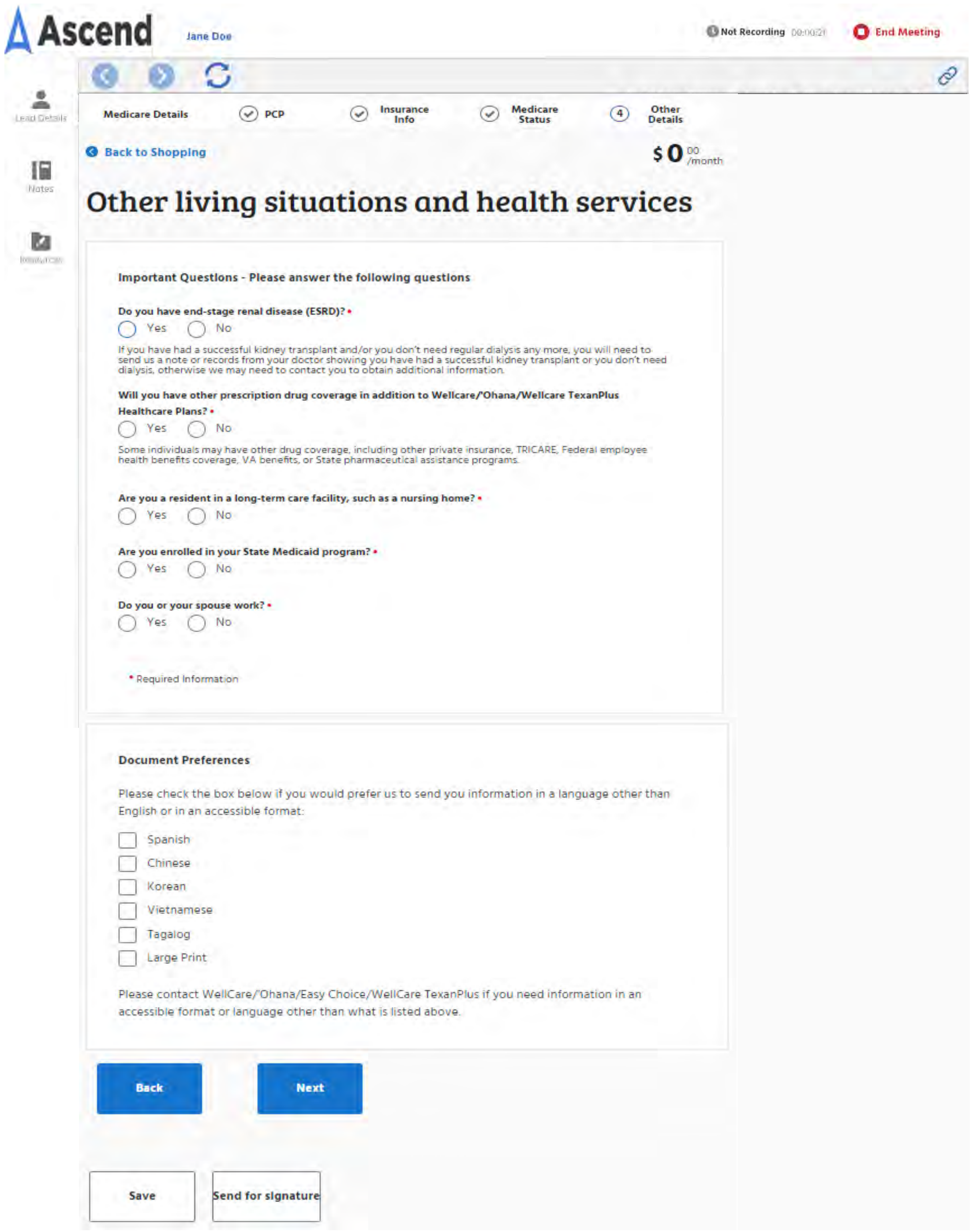
Fill in the form with the beneficiary’s Medicare Insurance information then click ‘Verify’.



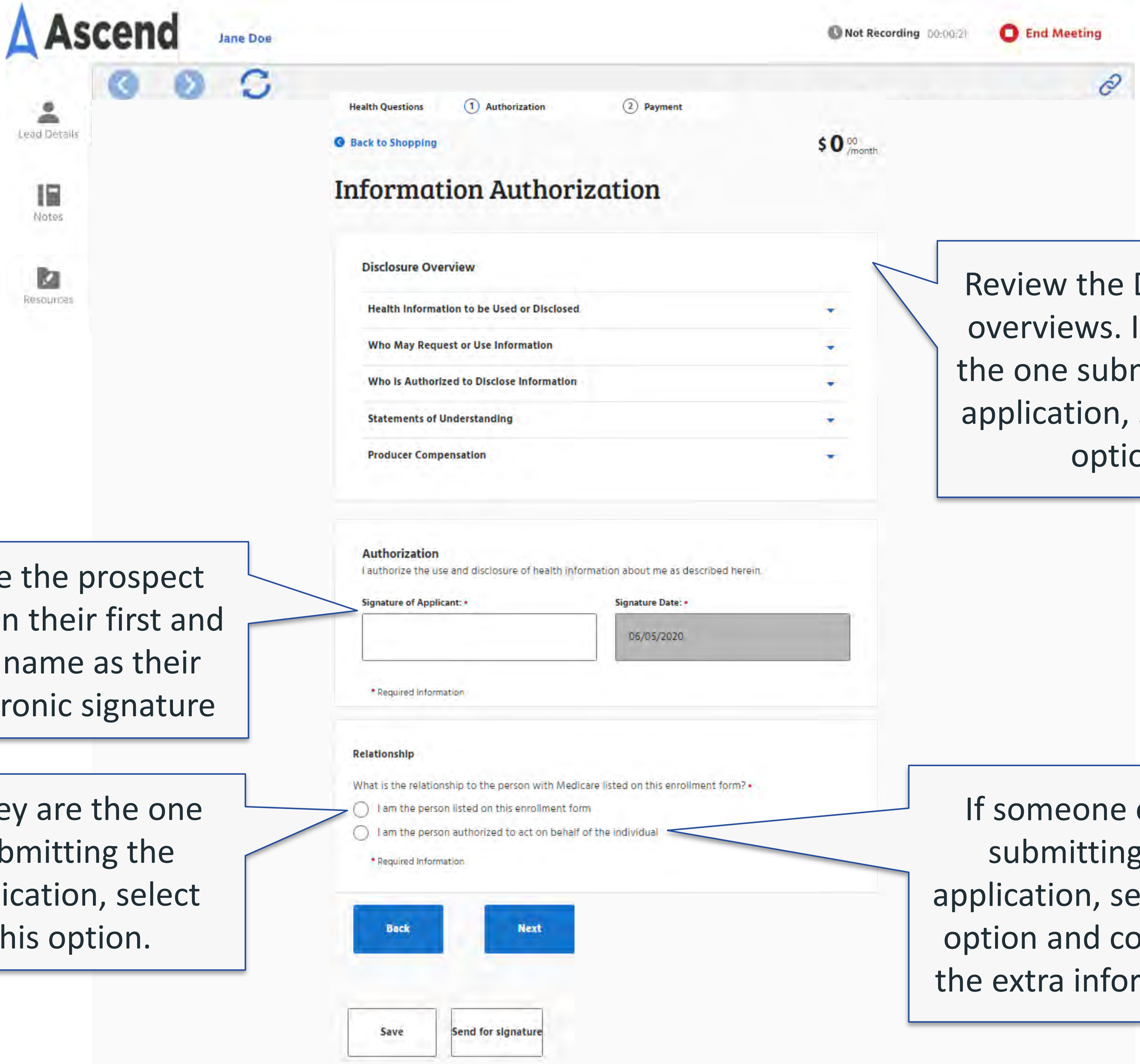
If the Part A and Part B Effective Dates do not return but you have verified the MBI is correct, click ‘Verify’ three times before being able to continue



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.



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

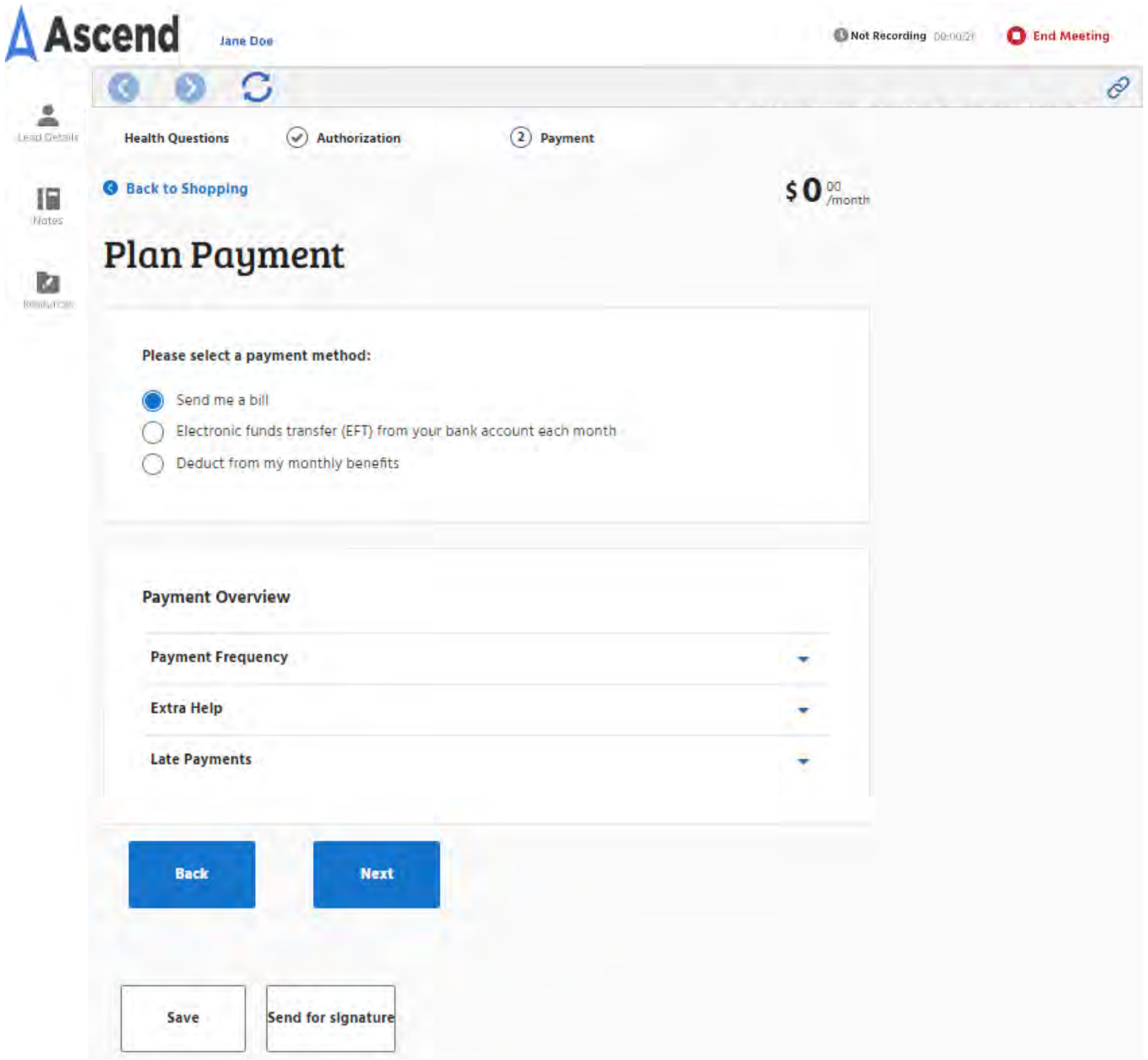


Review the Disclosure overviews. If they are the one submitting the application, select this option.

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

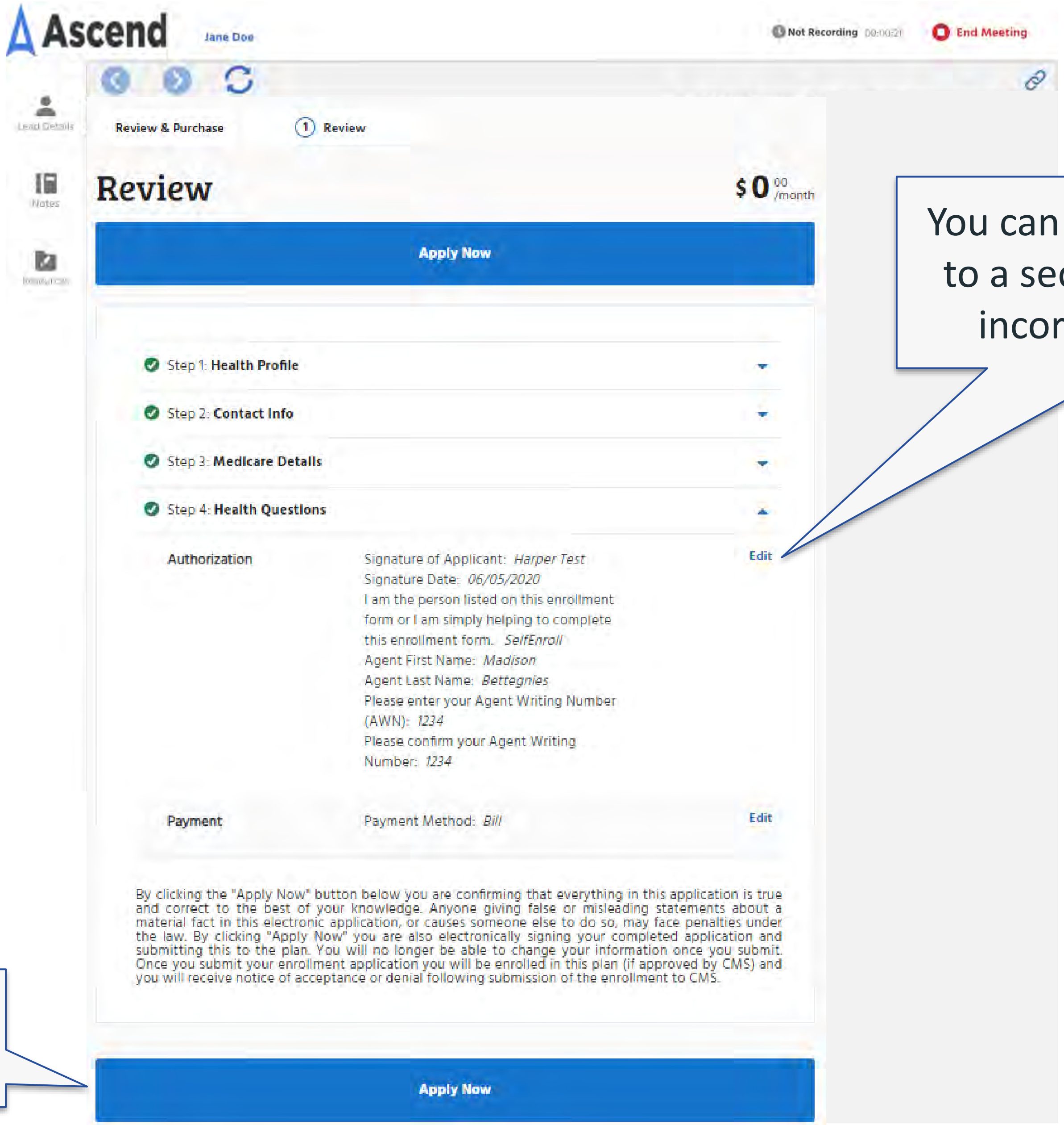
If they are the one submitting the application, select this option.

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



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.

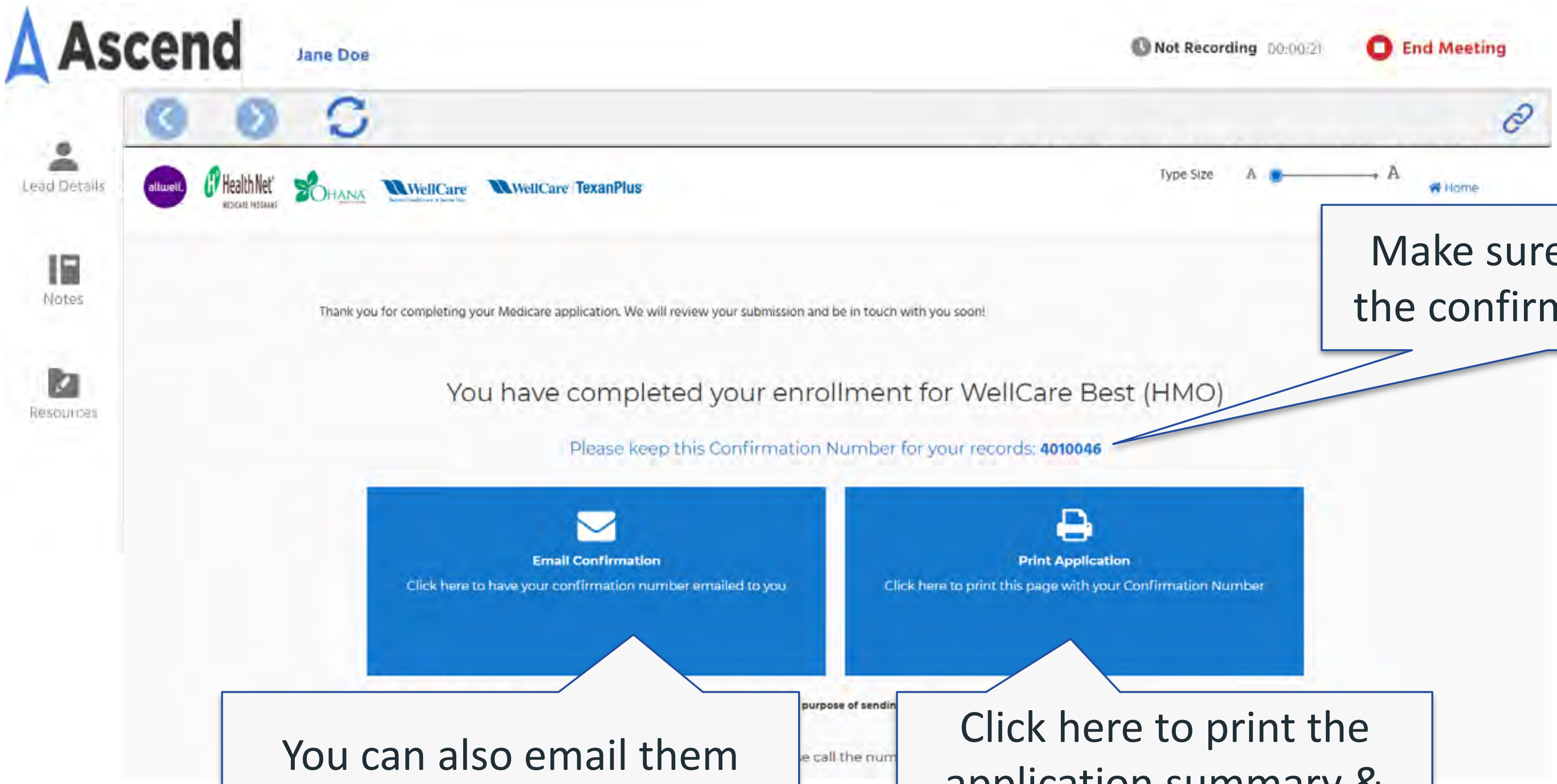
Finally, review the application with the beneficiary to ensure everything is correct.



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

Click ‘Apply Now’ to submit the Enrollment Application.

WellCare Plans

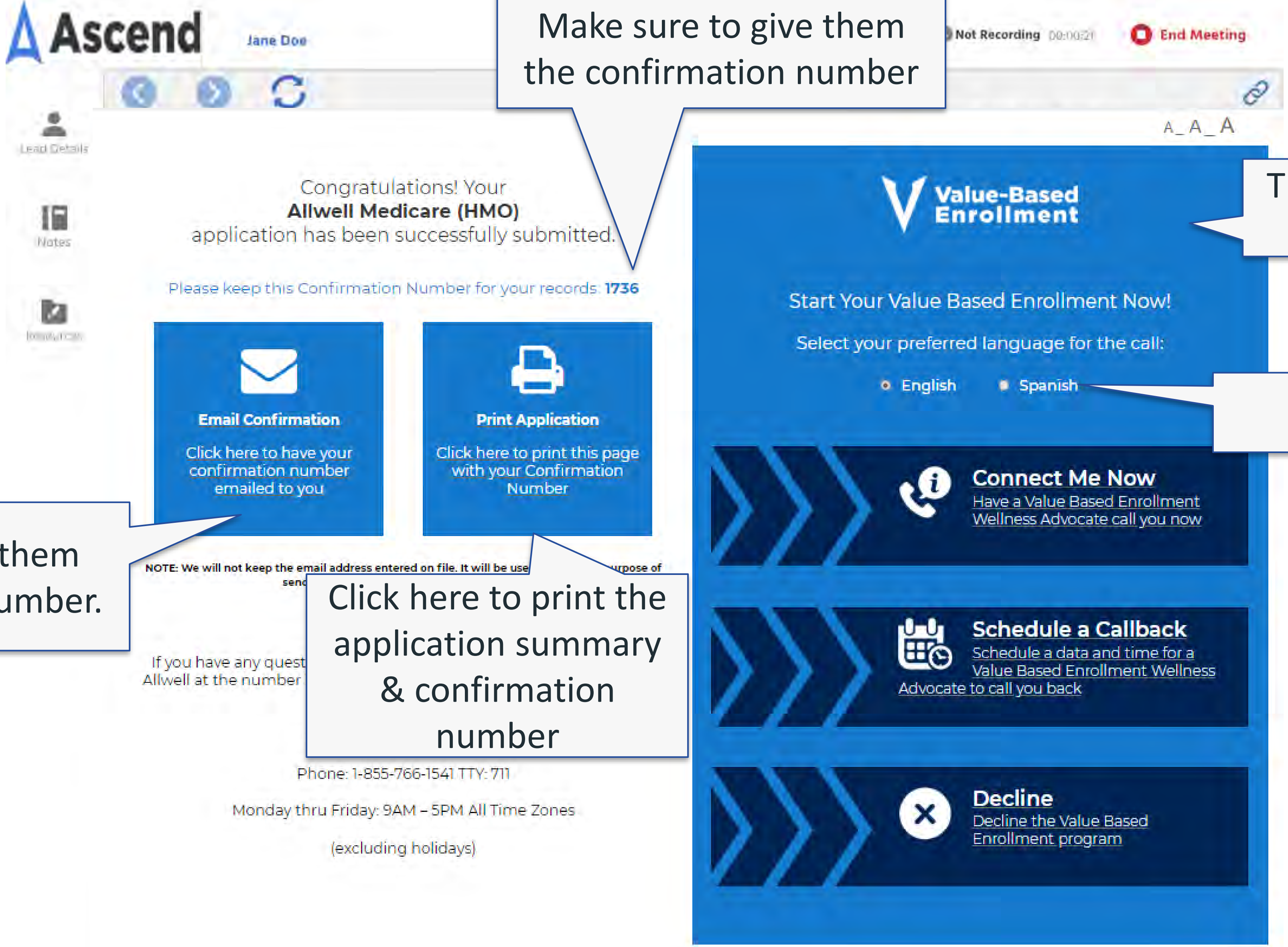


Make sure to give them the confirmation number

You can also email them their confirmation number.

Click here to print the application summary & confirmation number

Allwell & HealthNet Plans



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:

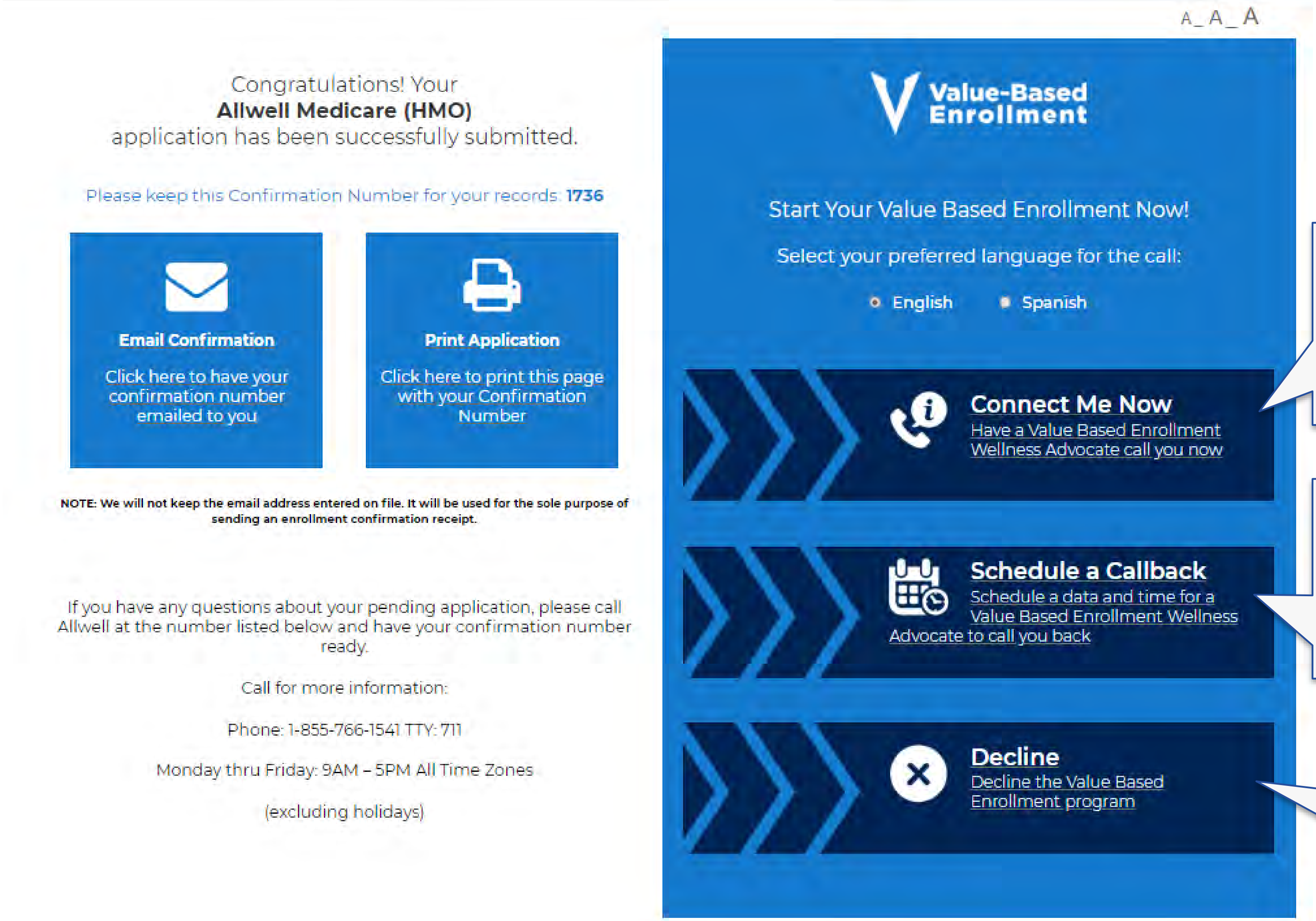
  “In order to best serve you, we have representatives on standby to assist with your transition into your new plan – they will help gather some important information related to your healthcare needs, [and to schedule your Annual Wellness Visit.] We want to make sure we do a great job of taking care of 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



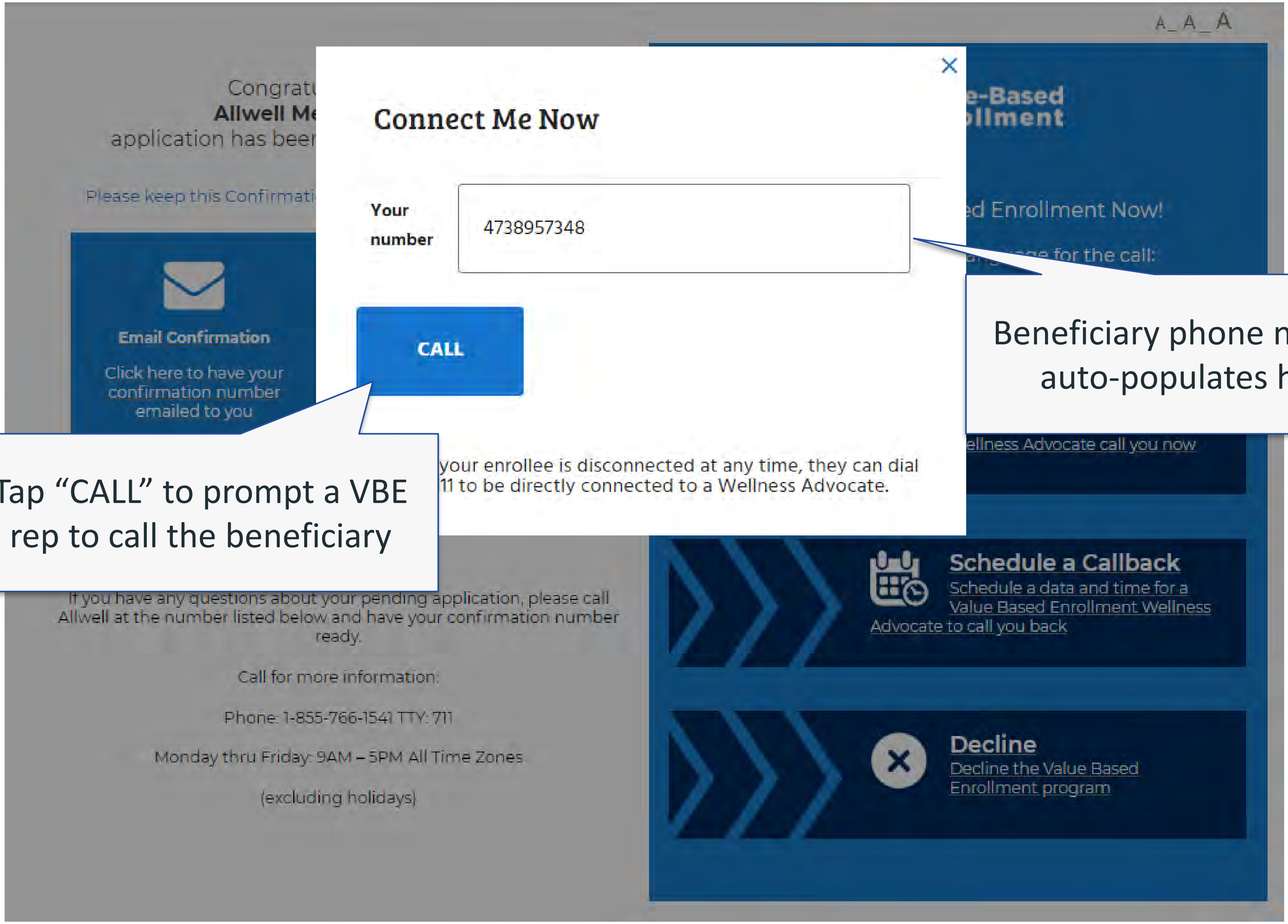
"Connect Me Now" will connect an enrollee with a Wellness Advocate on the spot. Leave the meeting location as these begin.

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



Beneficiary phone number auto-populates here

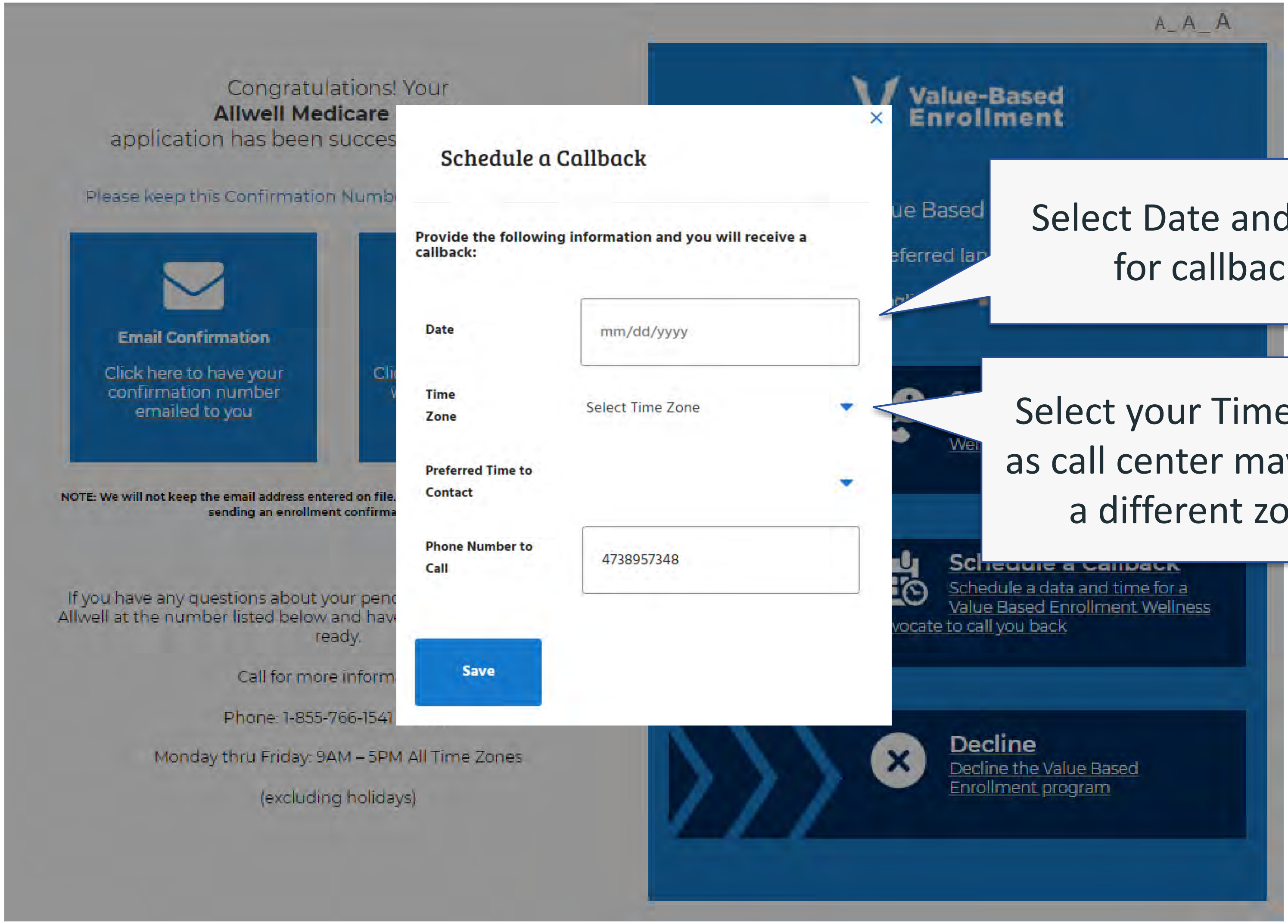
Tap "CALL" to prompt a VBE rep to call the beneficiary

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



Select Date and Time for callback

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

Callback Process

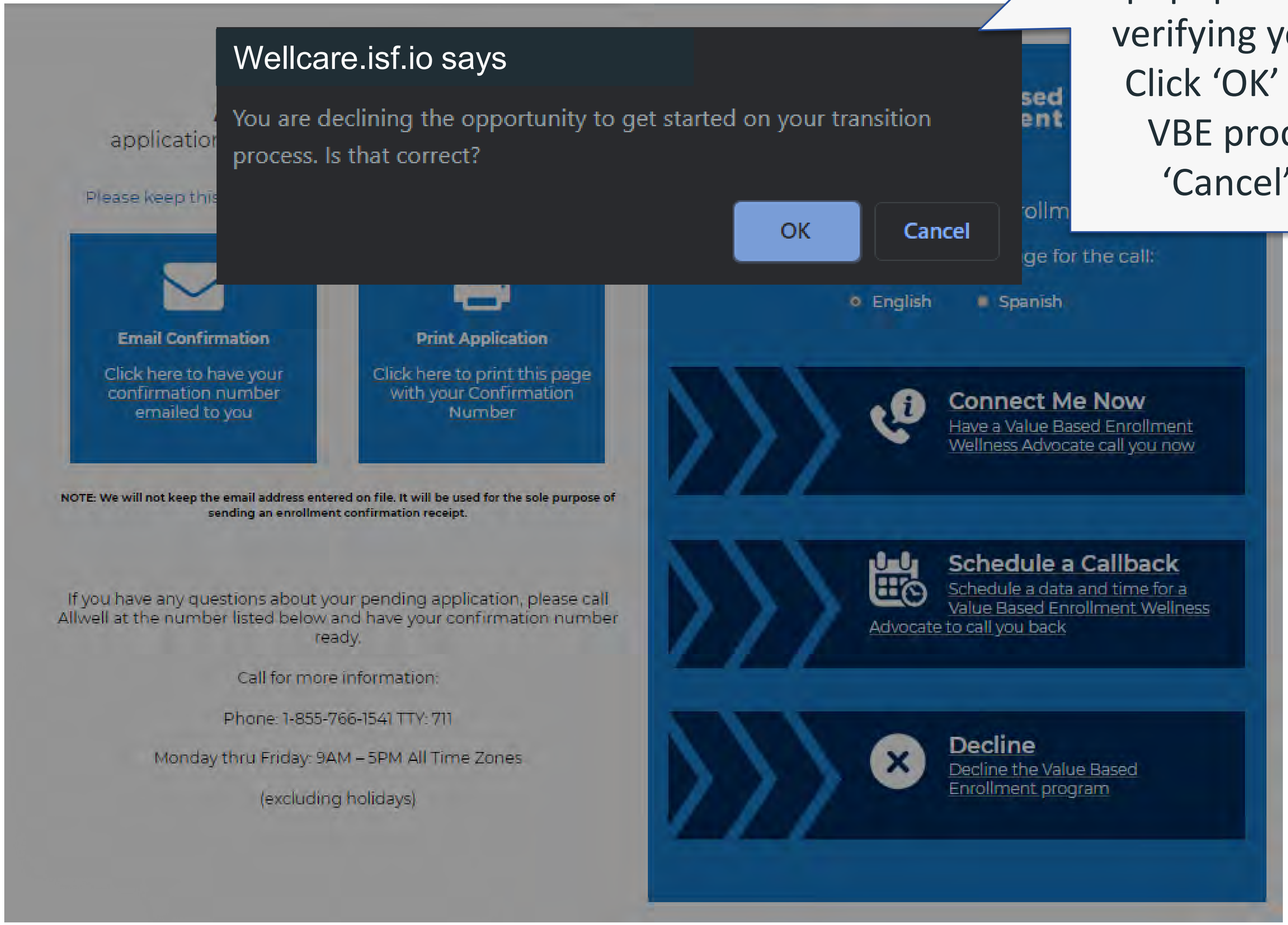
If the call center does not make contact with the beneficiary on the scheduled callback time, it will attempt contact three more times

Completion of the VBE process is of course the goal

DECLINE

Declining the VBE Process

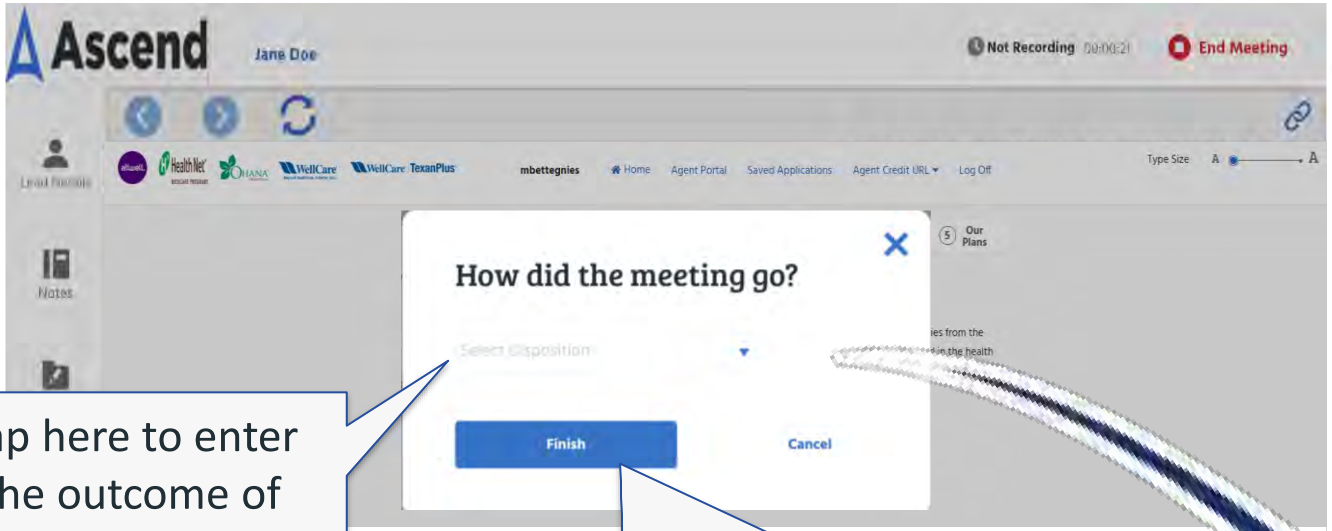
After selecting Decline, a popup box will appear verifying your selection. Click ‘OK’ to decline to VBE process or click ‘Cancel’ to return.



END MEETING

End the Meeting in AQE

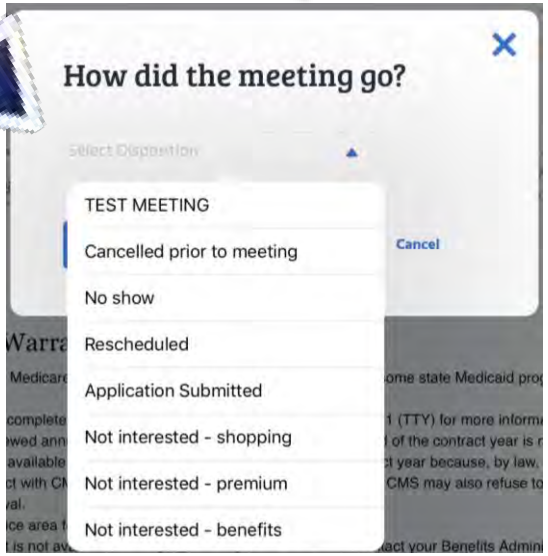
Click ‘End Meeting’ in the top right corner of the screen to conclude the meeting



Tap here to enter the outcome of your meeting

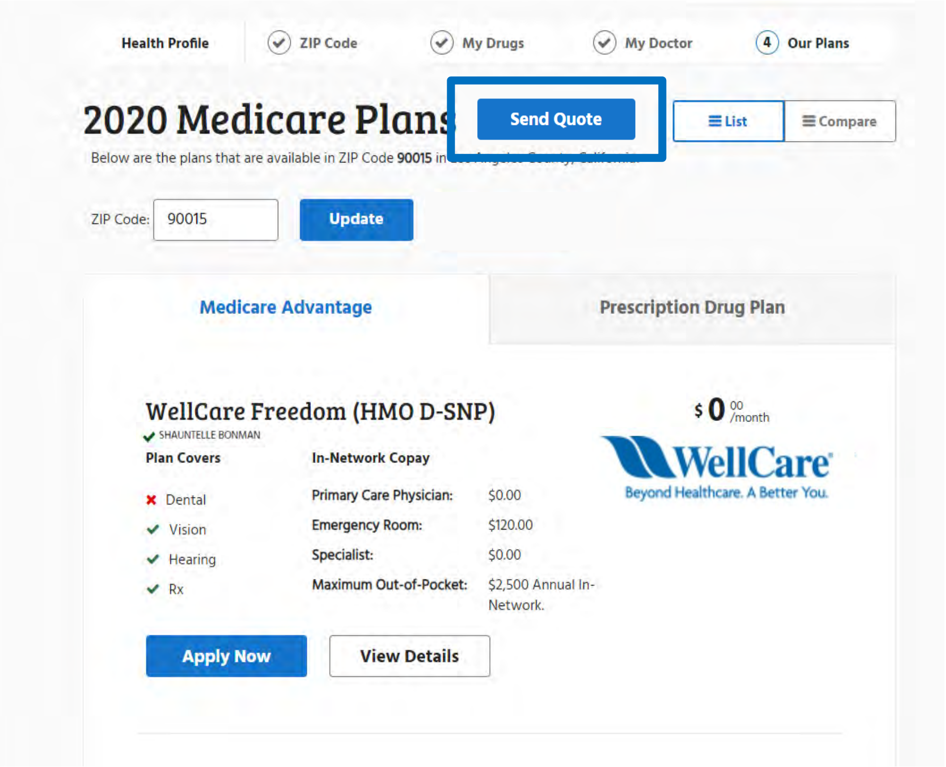
Once you have selected the best disposition, tap ‘Finish’ to end the meeting and the recording

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

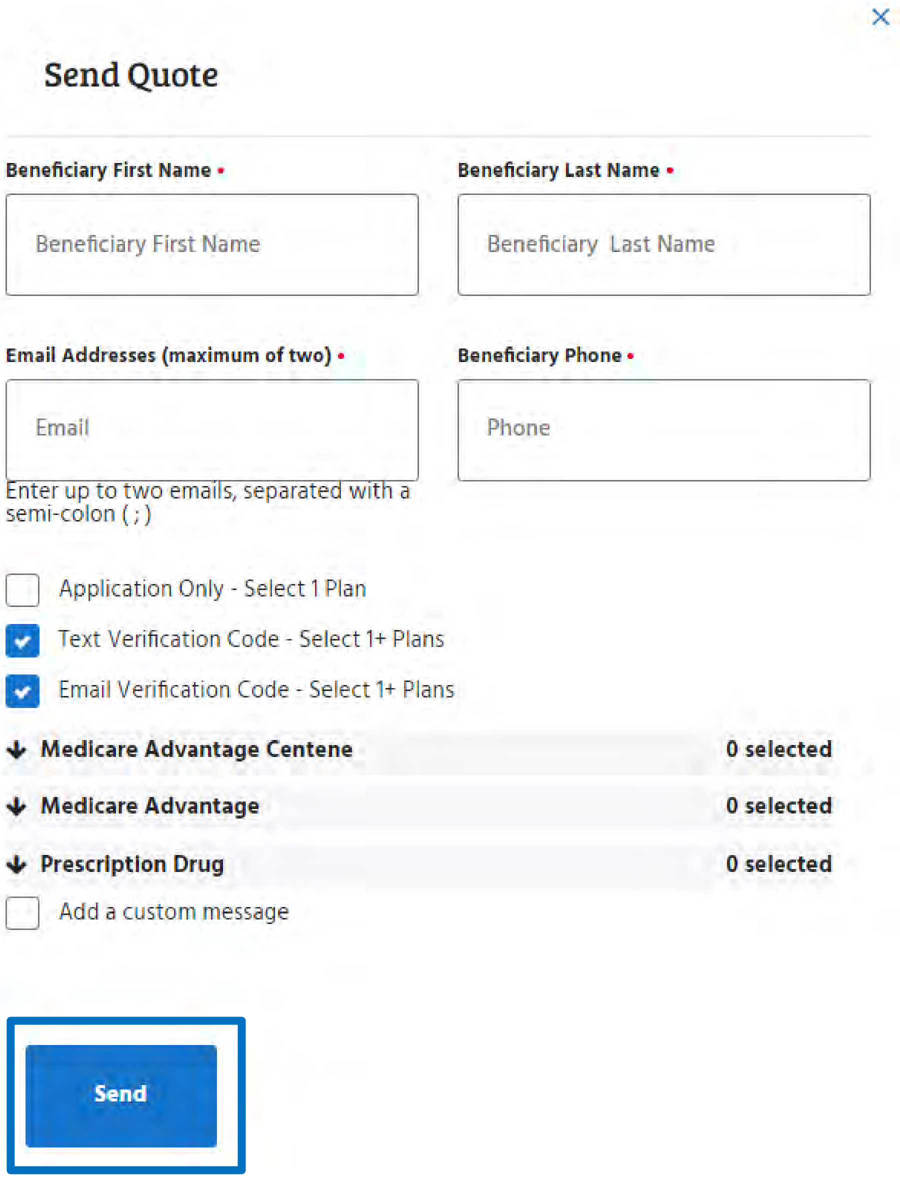


QUICK QUOTES

Send Quote (Quick Quote)



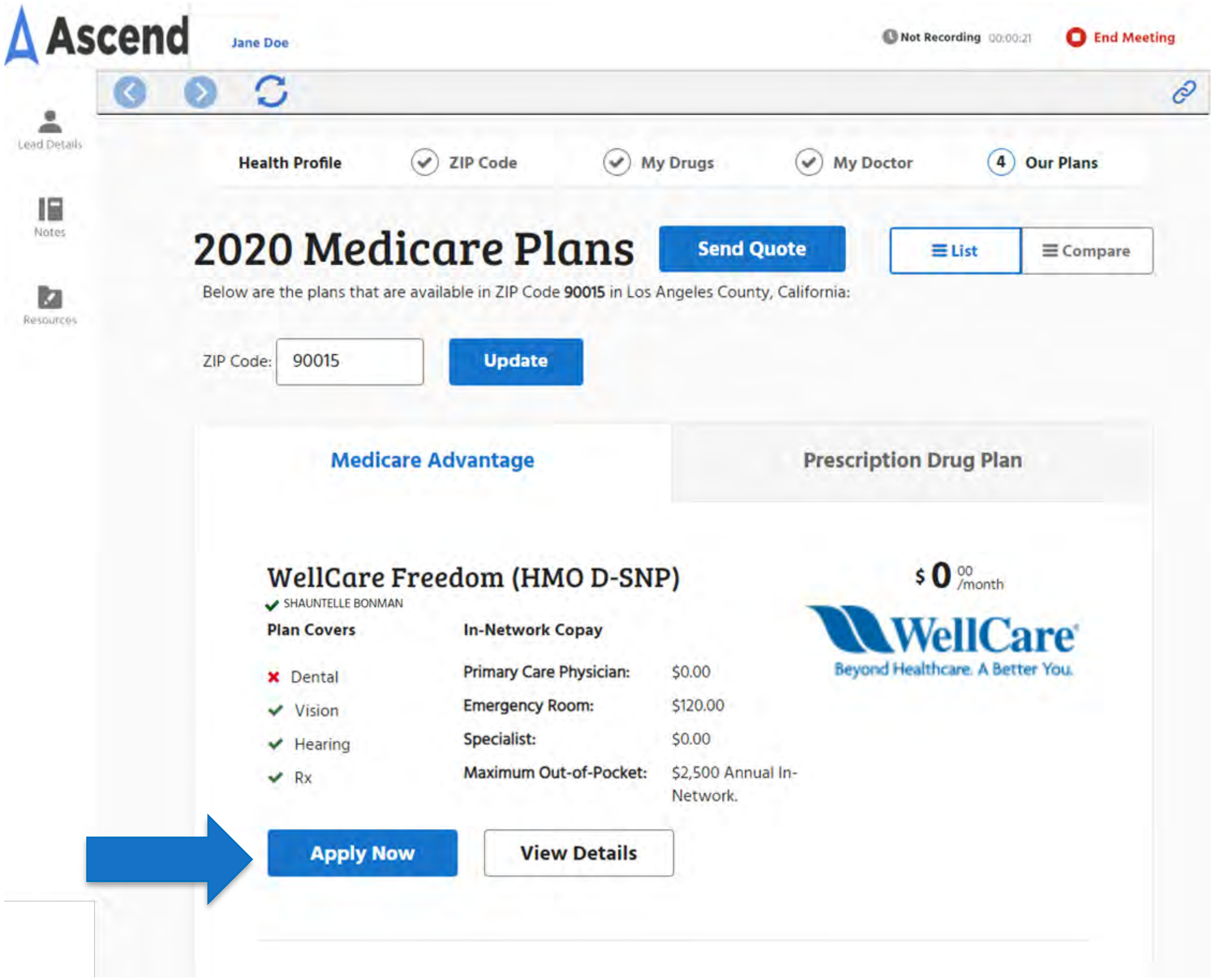
On the Quotes page, select ‘Send Quote’. A pop-up will appear. Fill out the beneficiary information, select the plan(s) to send, and click ‘Send’. To send only an application, check the ‘Application Only’ box.



SEND COMPLETED APPLICATIONS FOR BENEFICIARY APPROVAL

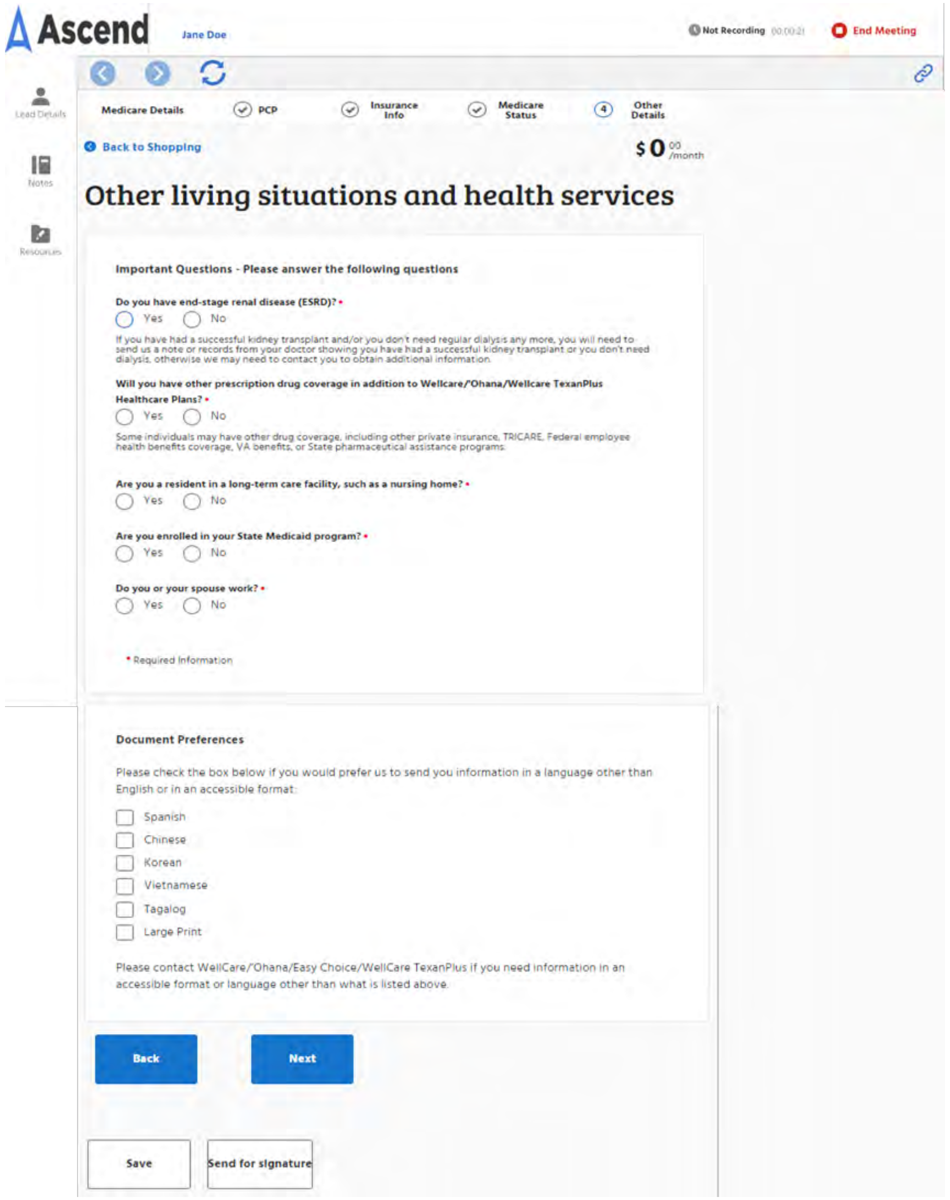
Click 'Apply Now' to Begin Application

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



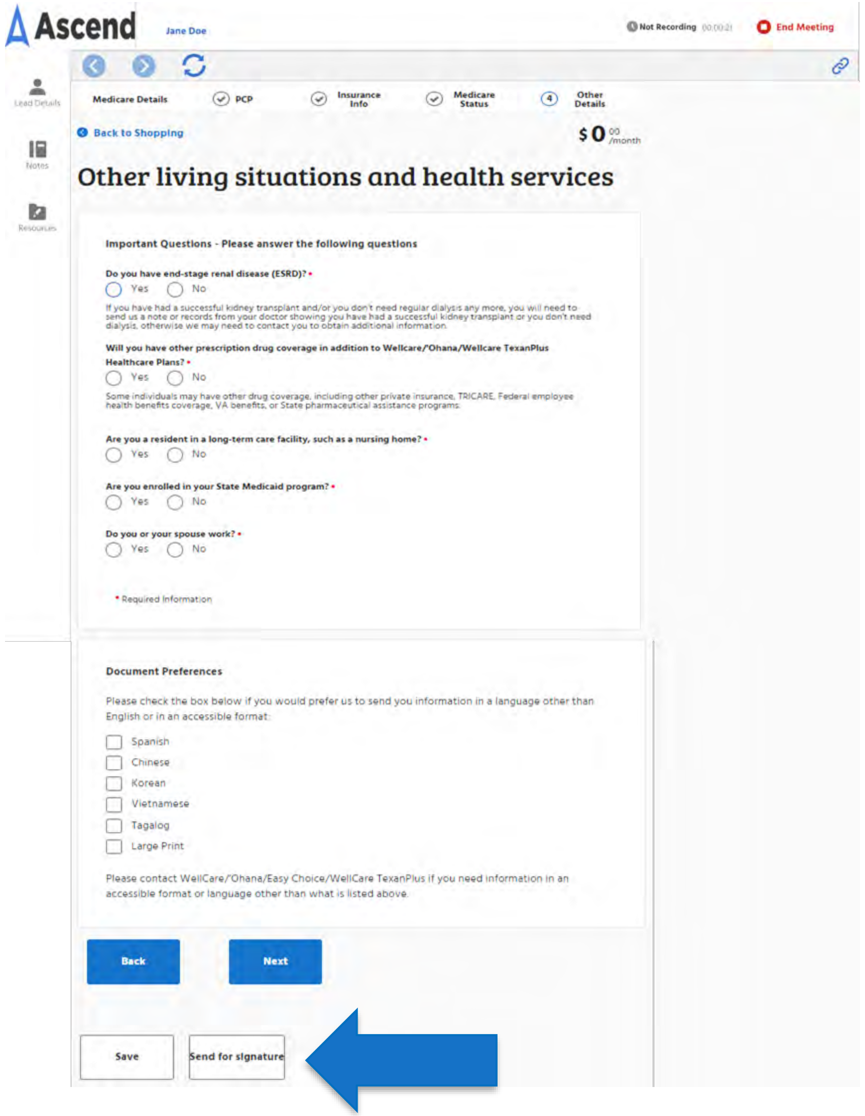
Fill in Application

Fill in as much prospect information as you can



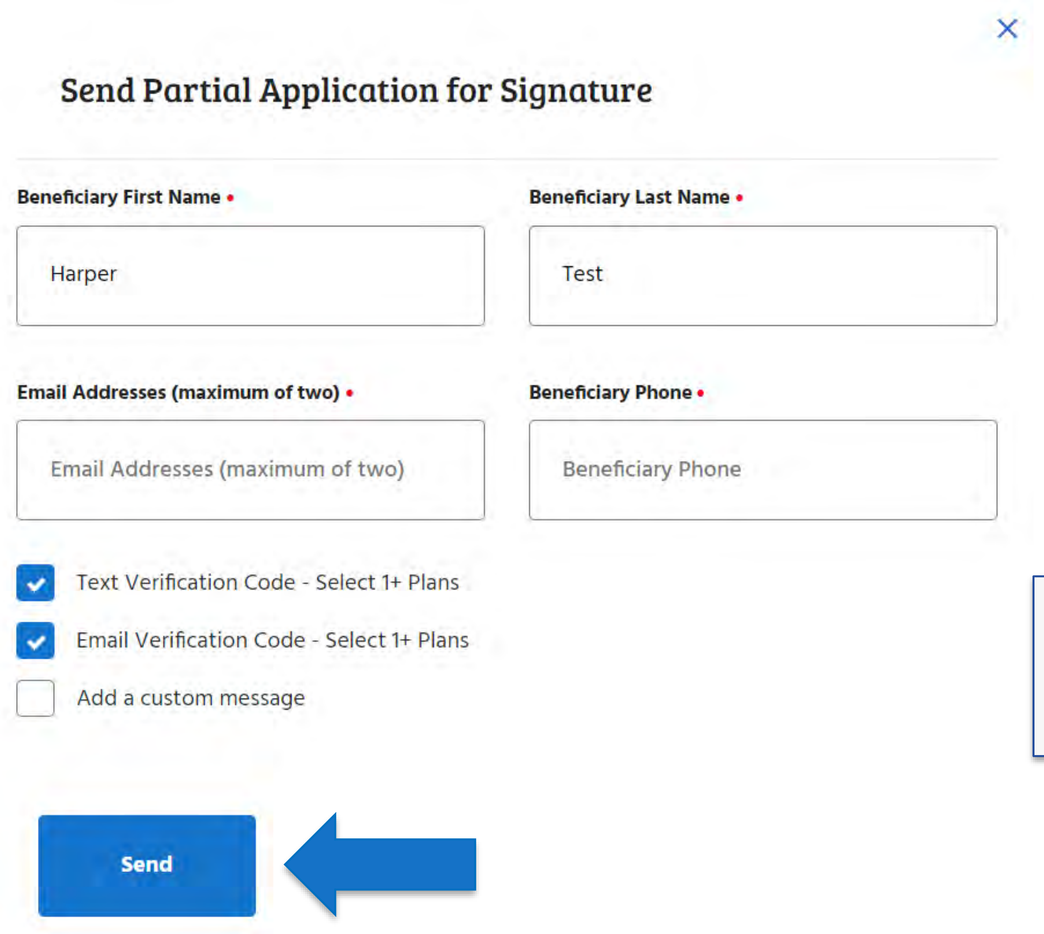
Click "Send for Signature"

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



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

Complete Required Fields & Click 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.

Send

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.

C 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

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.

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

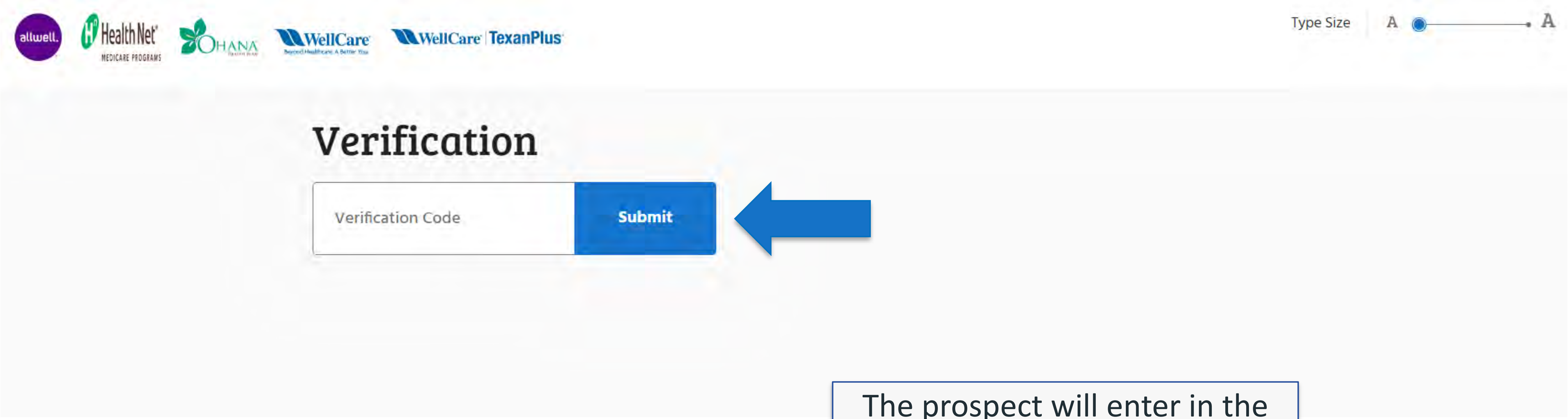
10:39 AM

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:

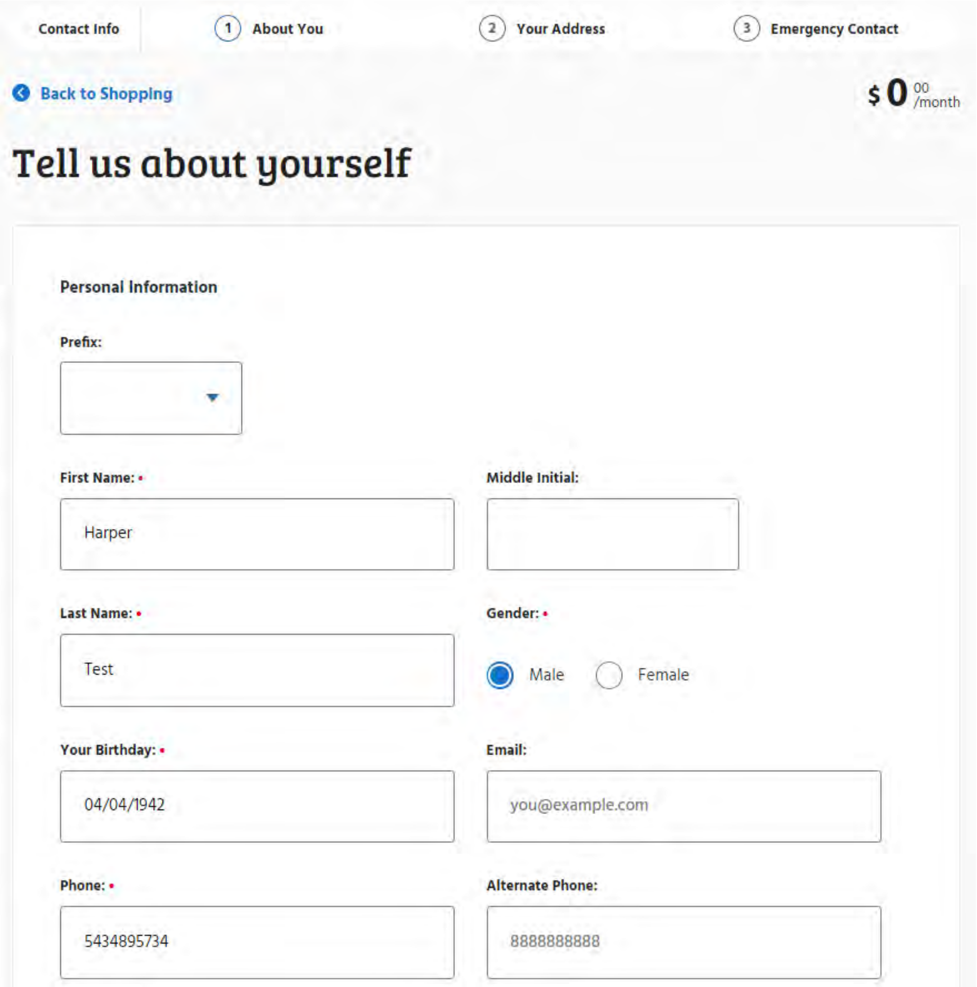
109492096

Prospect Steps – Enter Verification Code



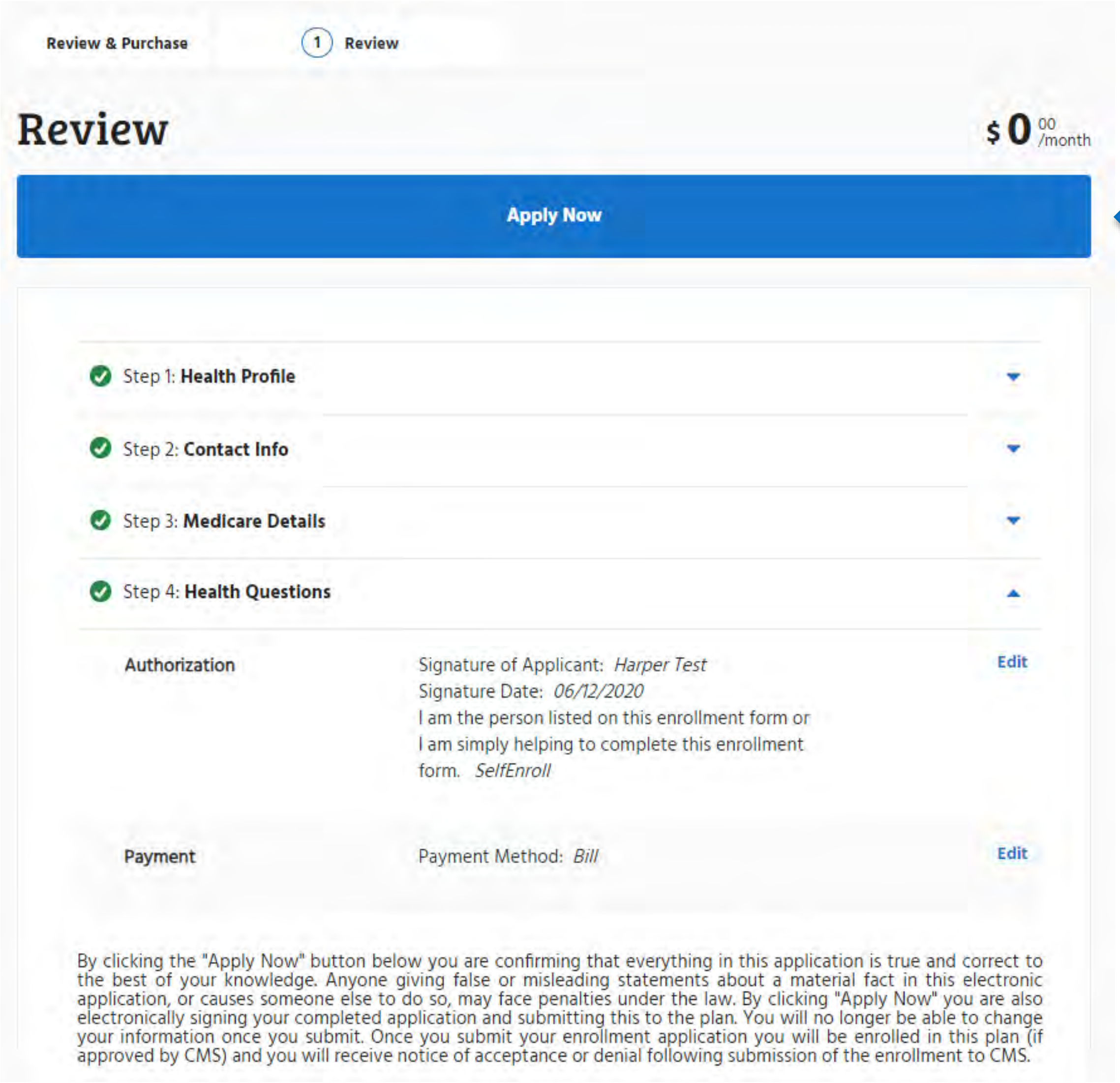
The prospect will enter in the verification code they received via text or email.

Prospect Steps – Review Entered Information



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

Prospect Steps – Click Apply Now

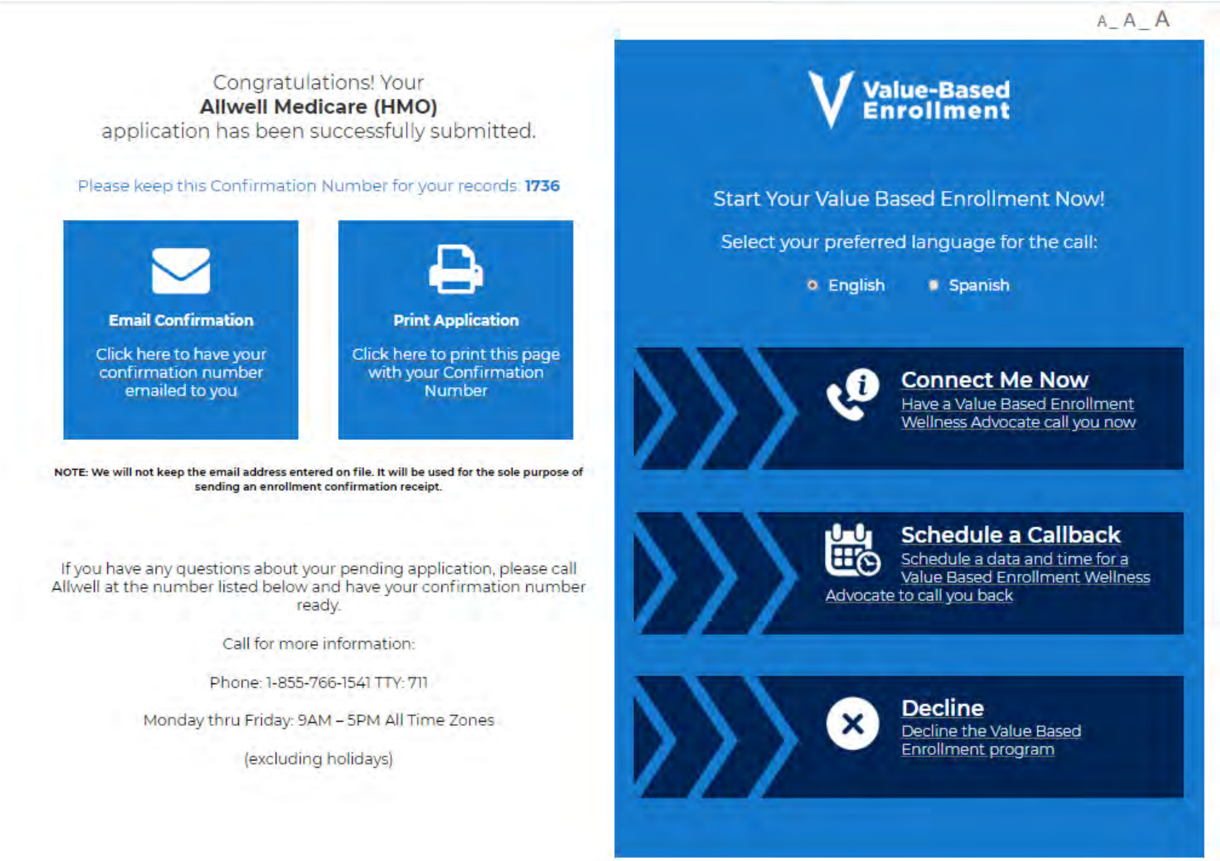


Once complete and reviewed, the prospect will click 'Apply Now'

Confirmation Page – Consumer VBE

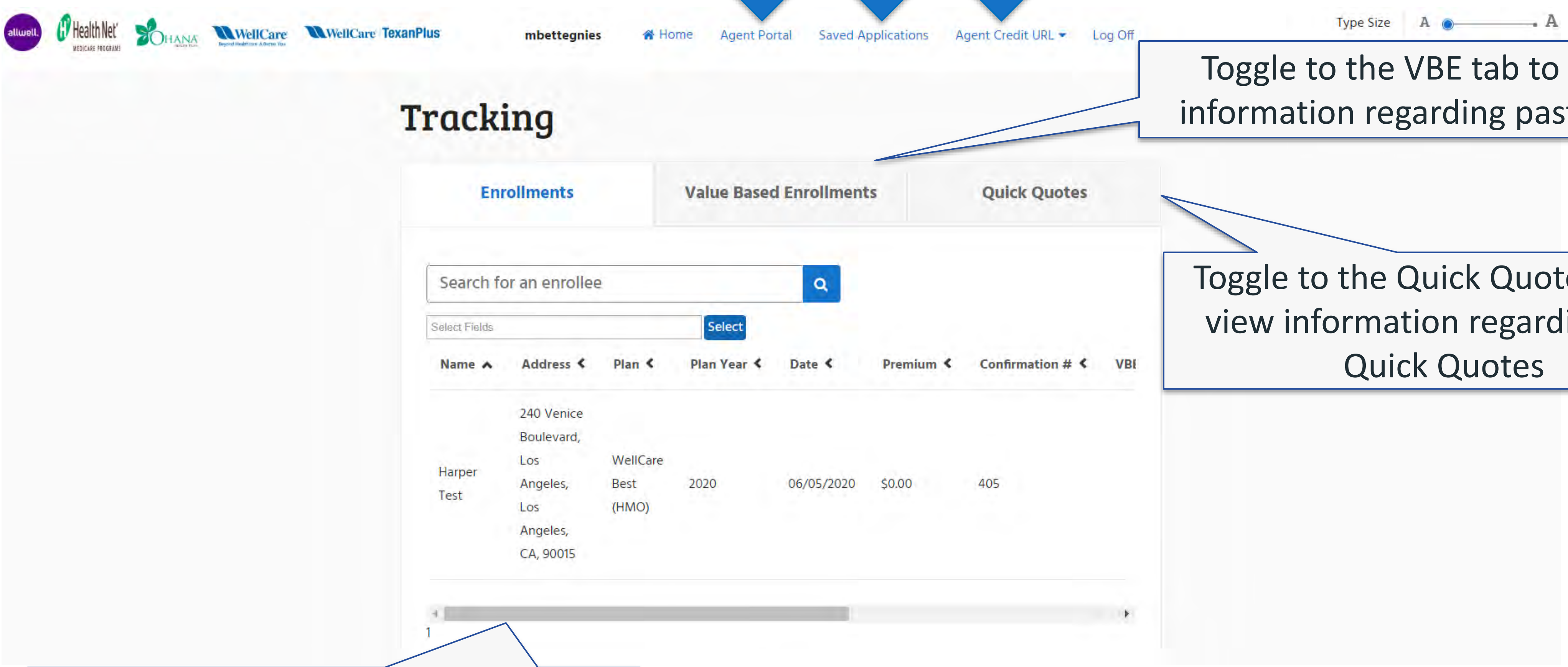
The prospect will be taken to the confirmation page where they can:

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



AGENT PORTAL

Agent Portal



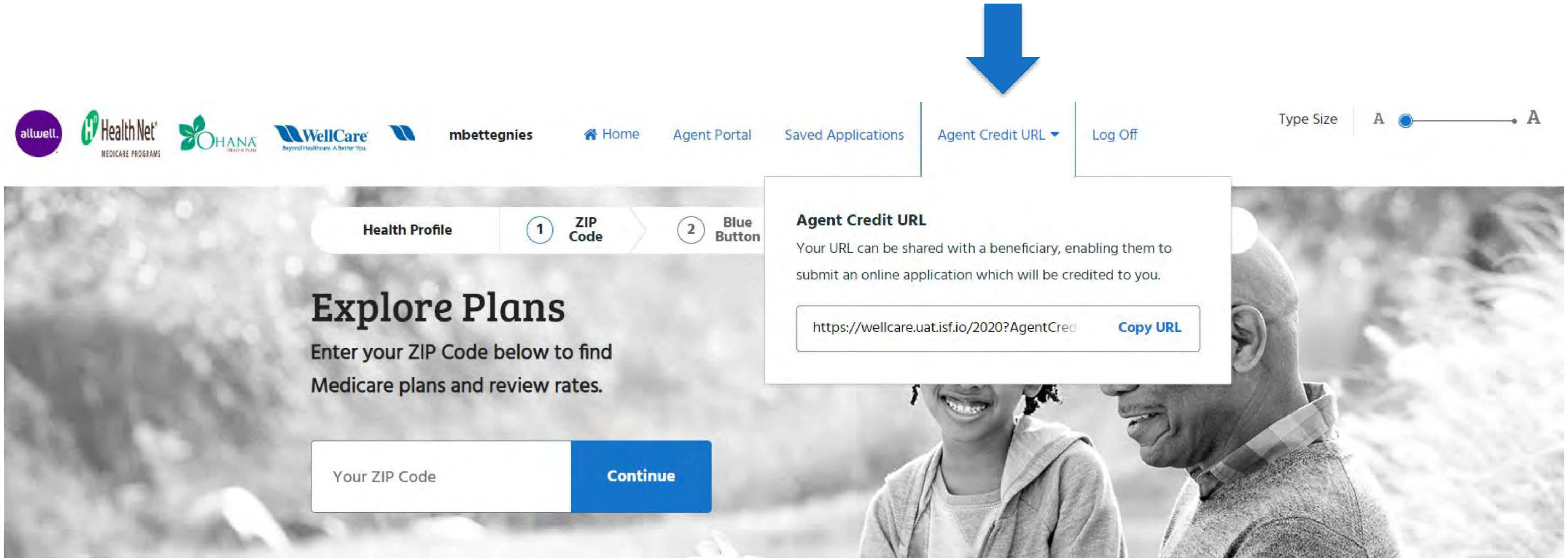
Toggle to the VBE tab to view information regarding past VBEs

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

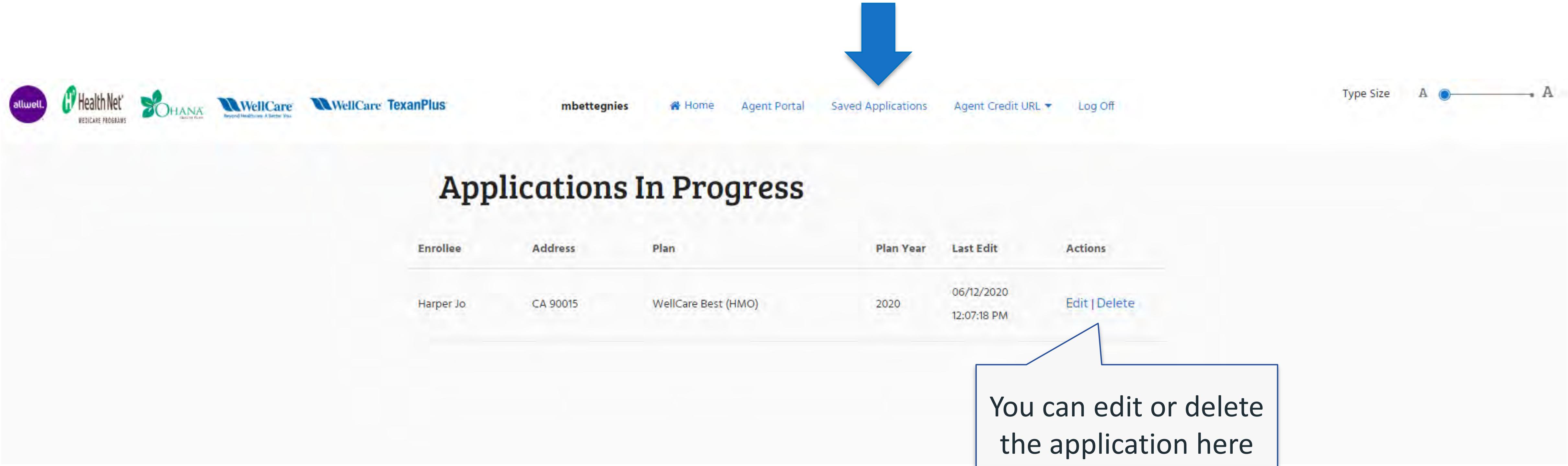
Agent Credit URL/Personal URLs

- 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


allwell.
Health Net
MEDICARE PROGRAMS
OHANA
WellCare
Beyond Healthcare. A Better You.
mbettegnies
Home
Agent Portal
Saved Applications
Agent Credit URL
Log Off
Type Size
A
A
Health Profile
1 ZIP Code
2 Blue Button
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
Explore Plans
Enter your ZIP Code below to find Medicare plans and review rates.
Your ZIP Code
Continue

SAVED APPLICATIONS

Saved Applications



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.

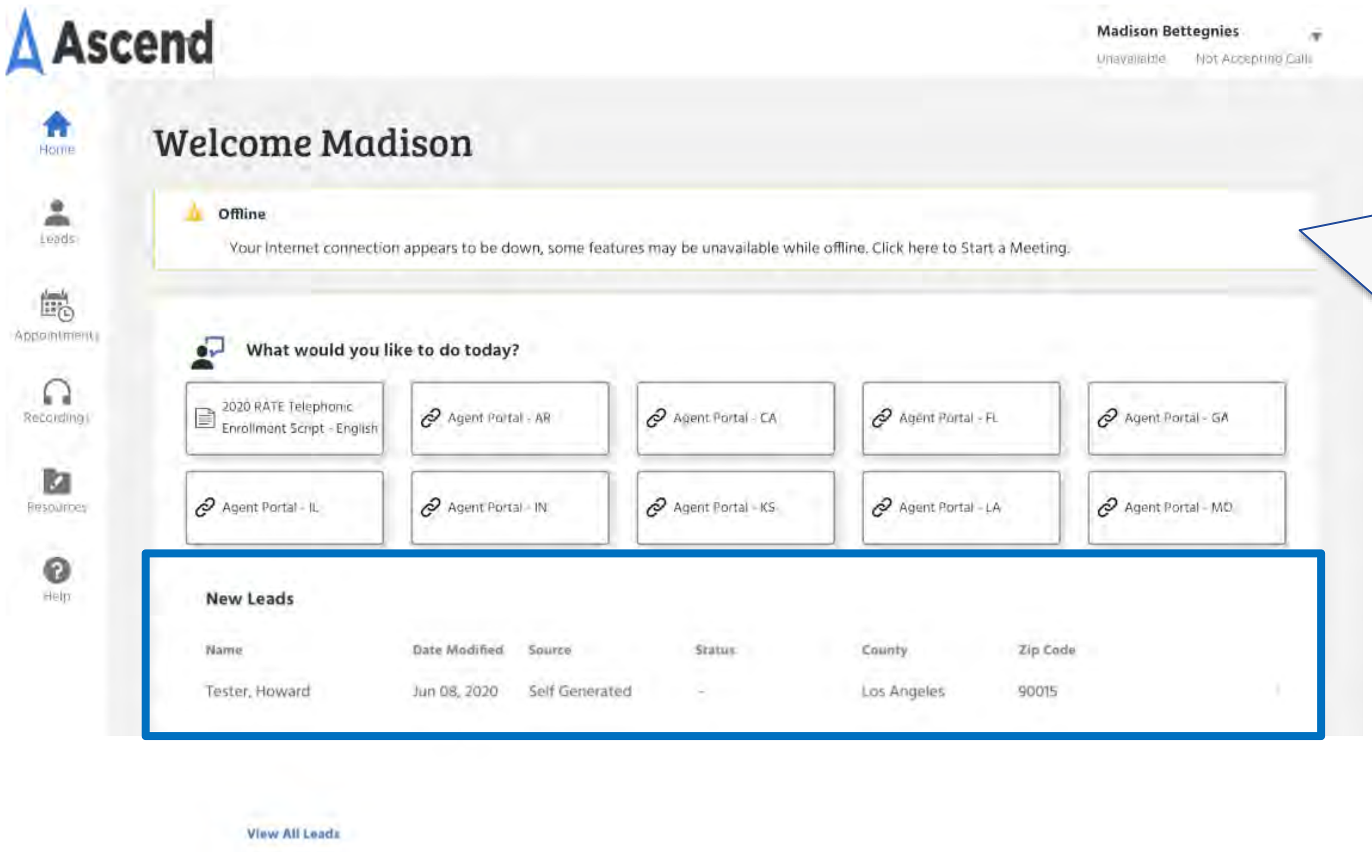
Steps for Completing a Saved Application

1. Select your Lead
2. Start a Meeting
3. Verify Zip Code & Lead Name
4. Saved Applications
5. Locate Lead's Name & Click 'Edit'
6. Complete Application

OFFLINE APPLICATIONS

Selecting a Lead

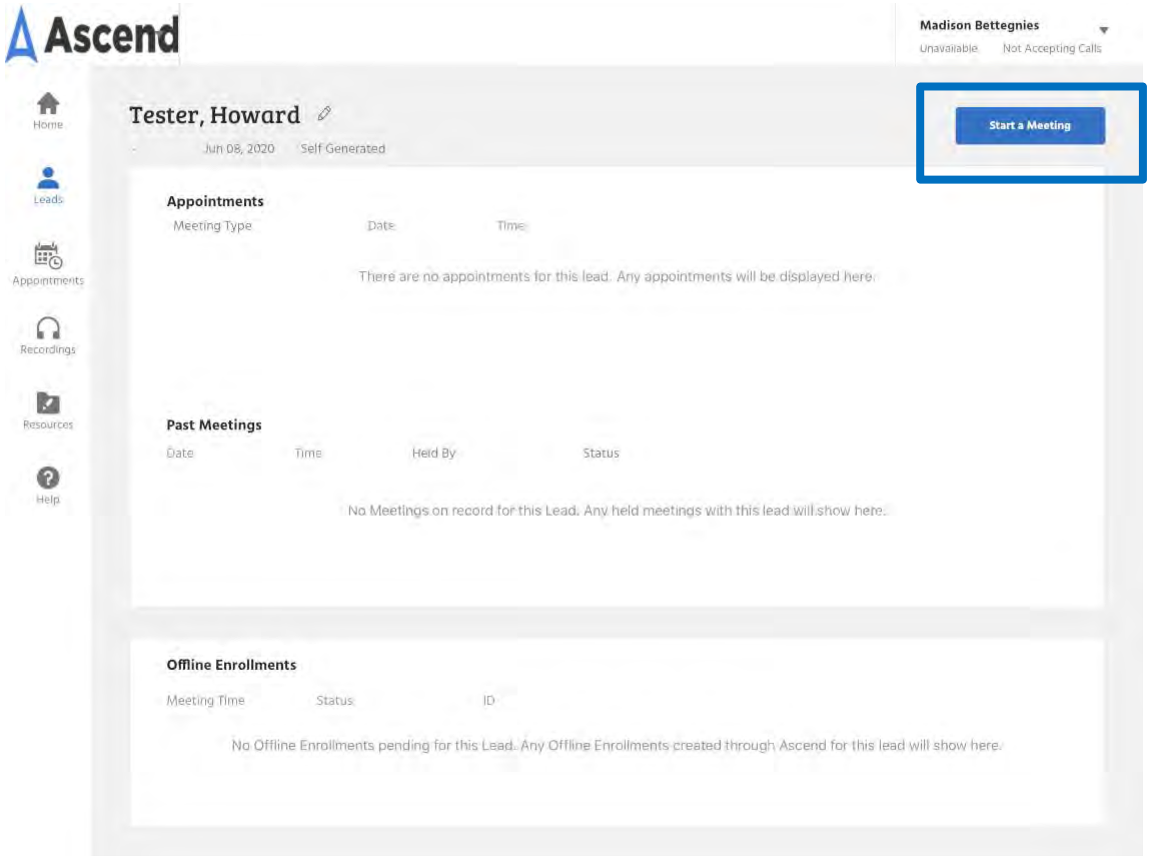
- From the Home screen, select the lead you would like to submit an application for under the New Leads section.



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

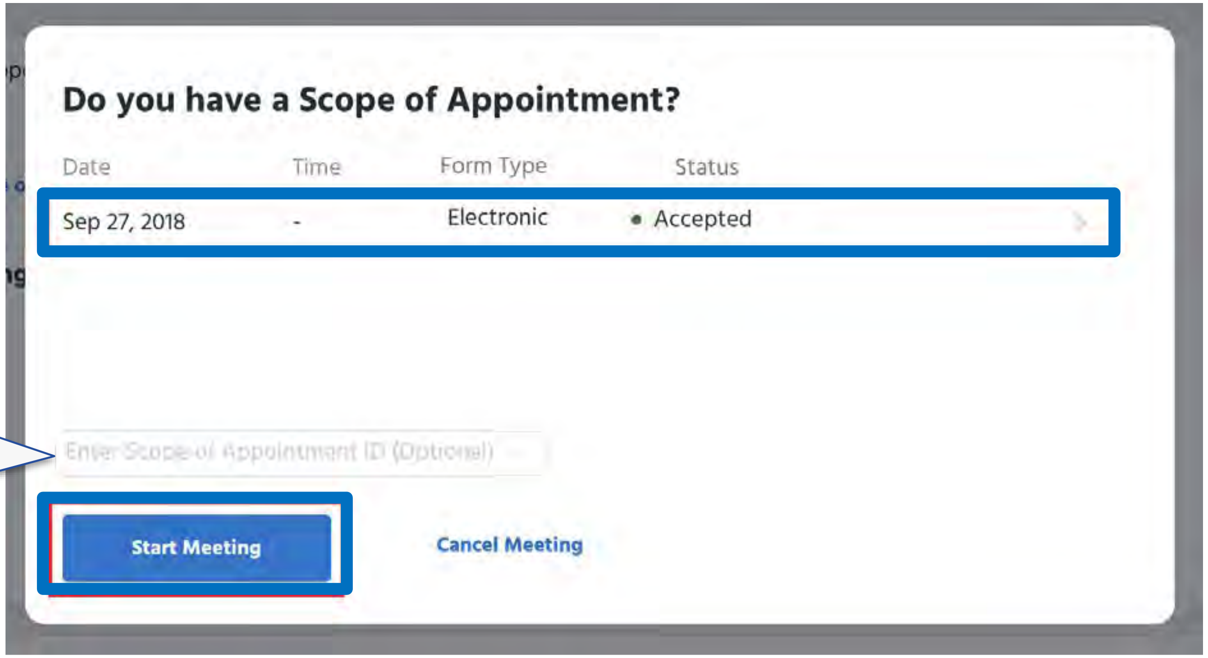
Start a Meeting

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



Selecting a SOA

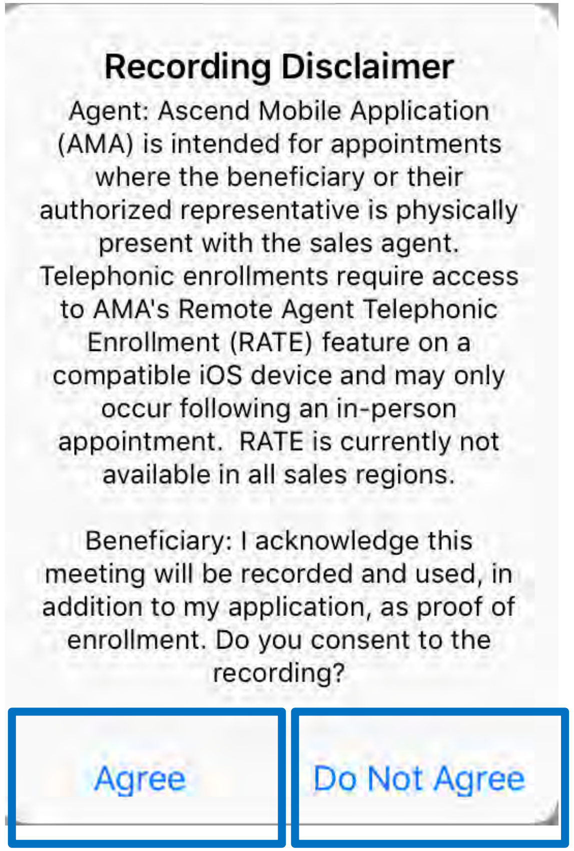
- If you have a previous Scope of Appointment (SOA), it will be listed on the next screen
- Simply click on the SOA you want to use then select ‘Start a Meeting’
  - If no SOA is listed, you will need to ensure you complete a proper scope before starting the meeting



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

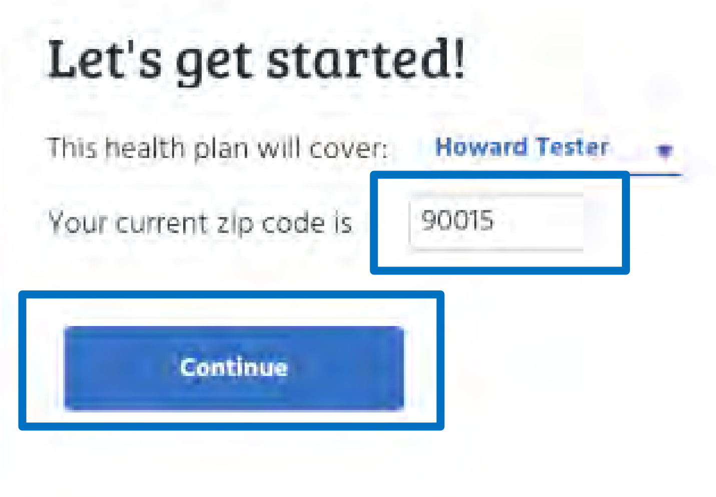
Accepting the Disclaimer

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



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

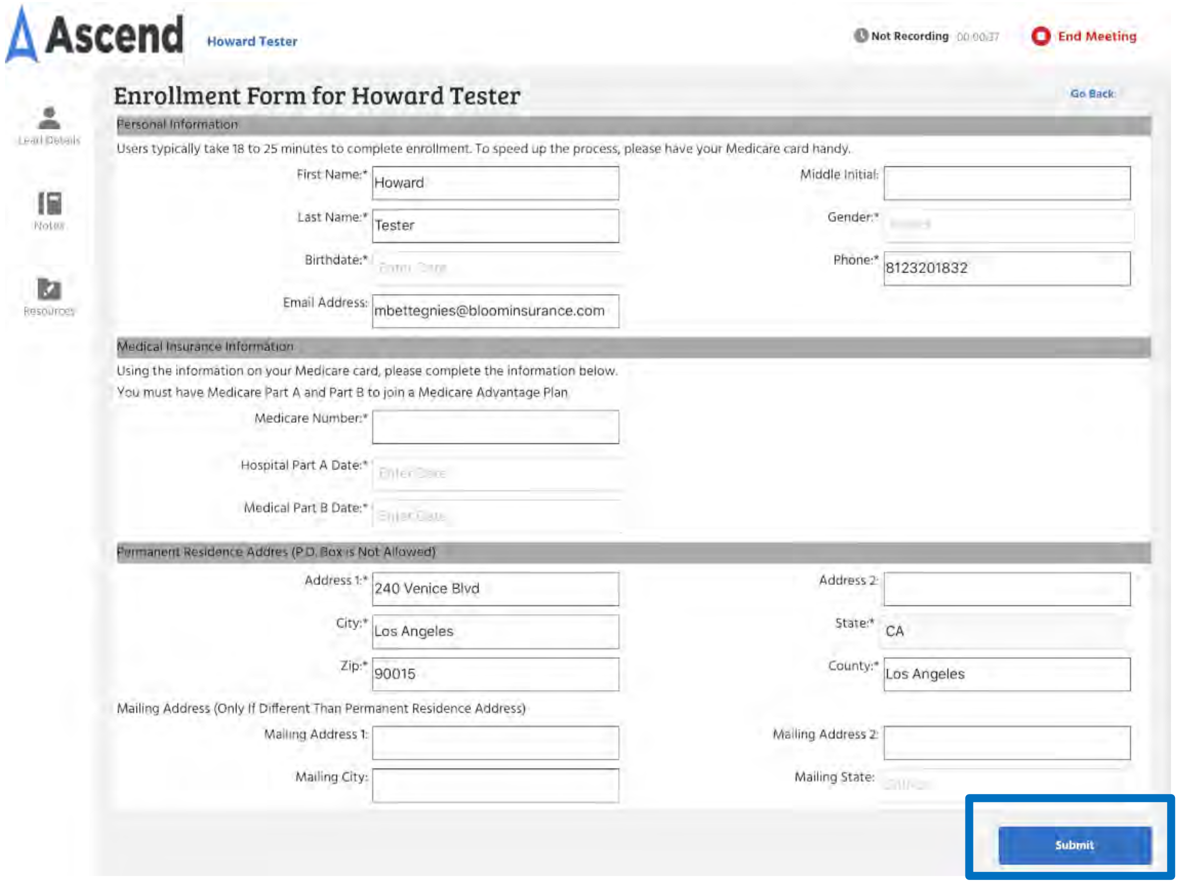


Selecting an Enrollment Form

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

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.

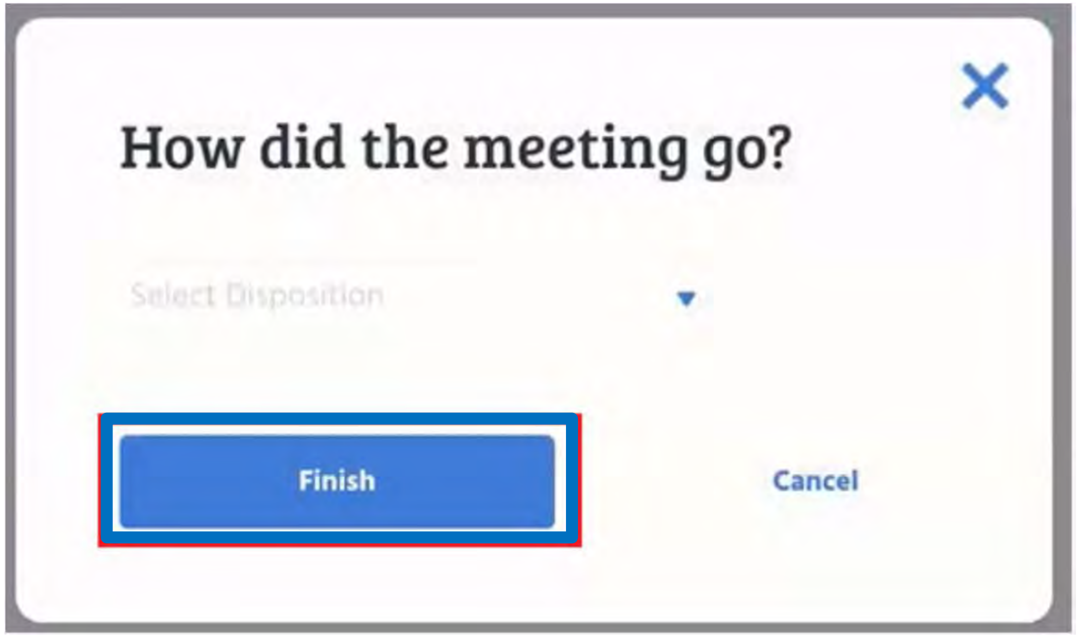


Ending the Meeting

- 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



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

Offline Enrollments

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

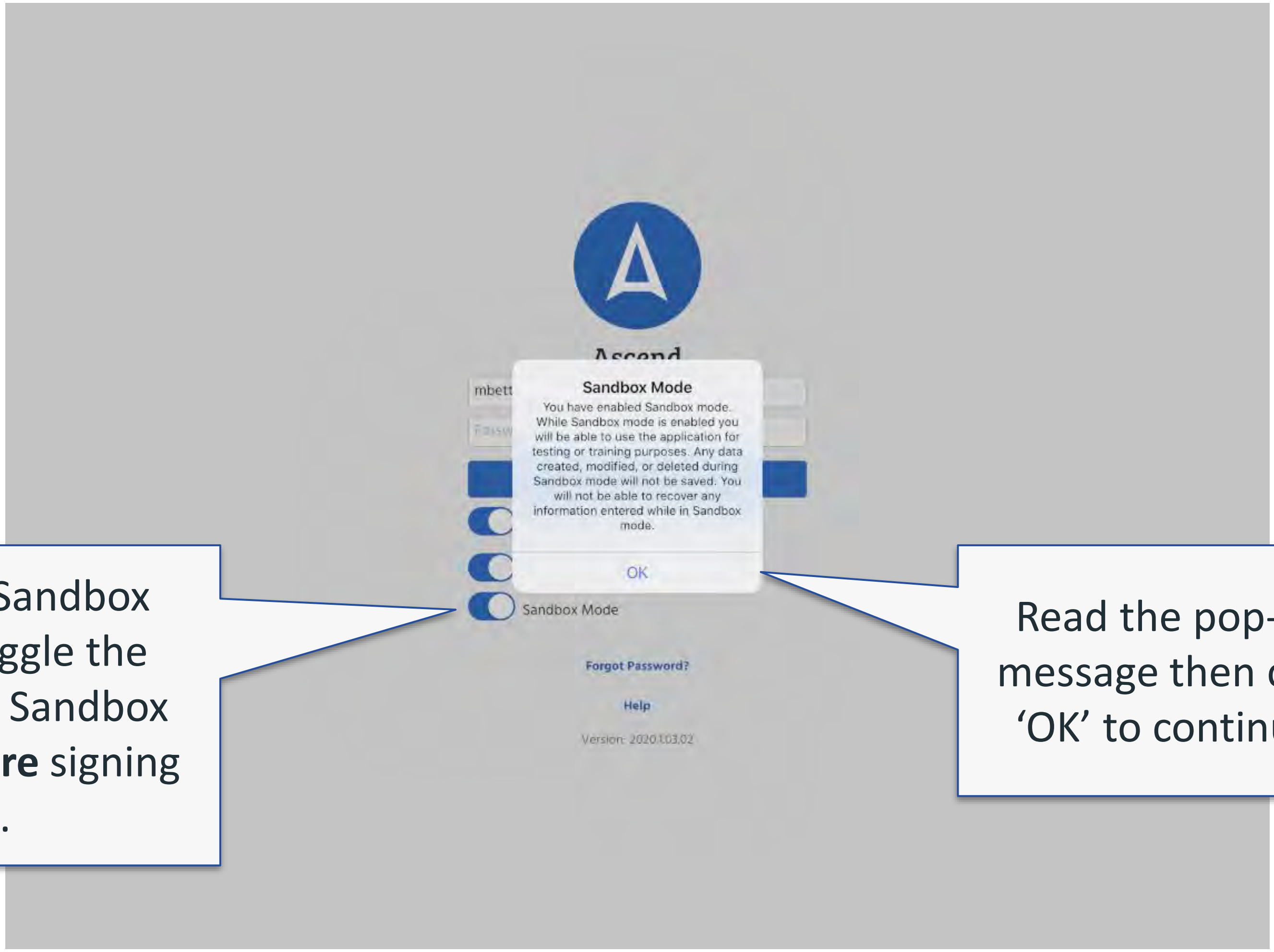
Confirming Lead Status

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

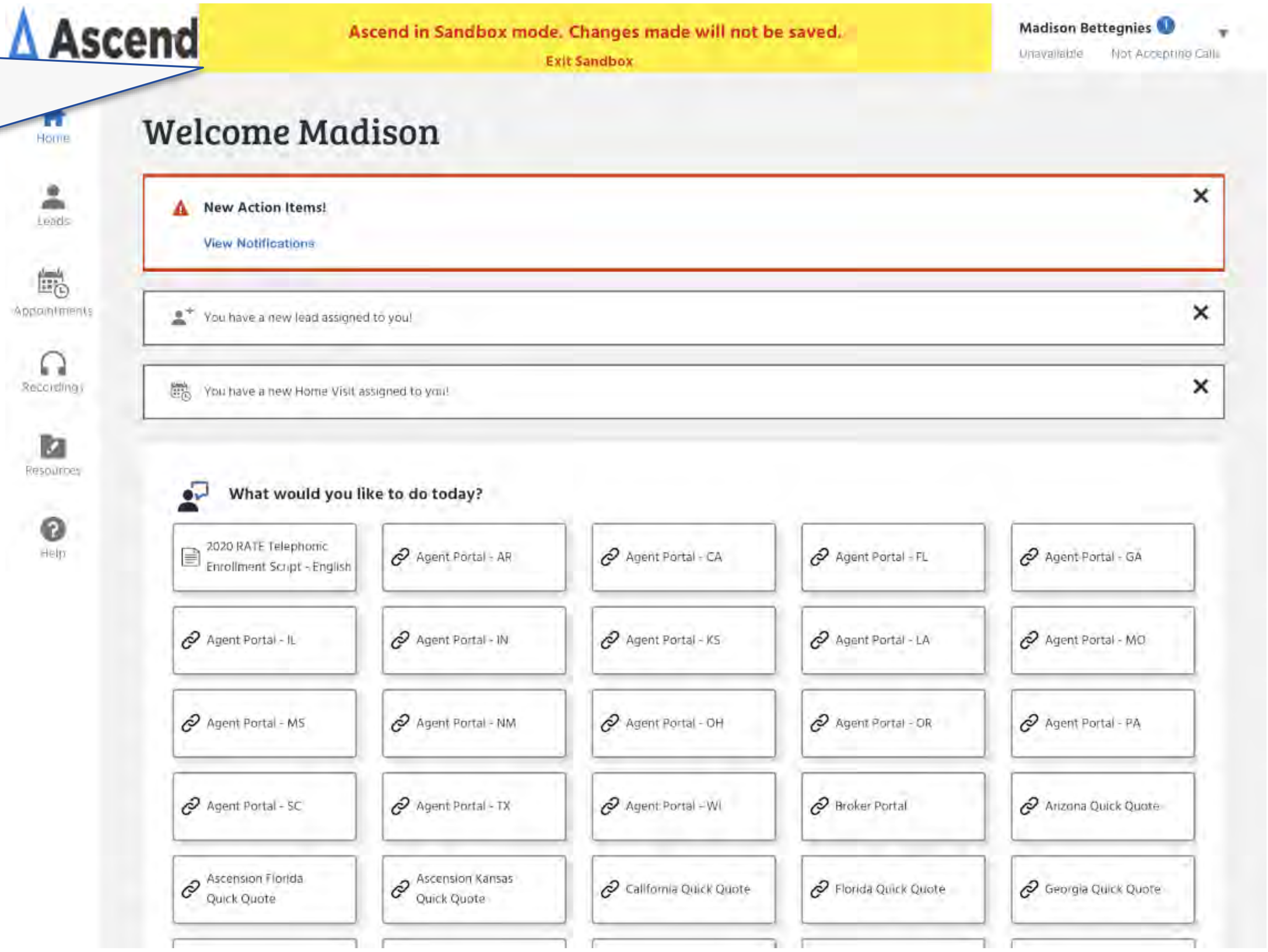


To enter Sandbox mode, toggle the button for Sandbox mode **before** signing in.

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

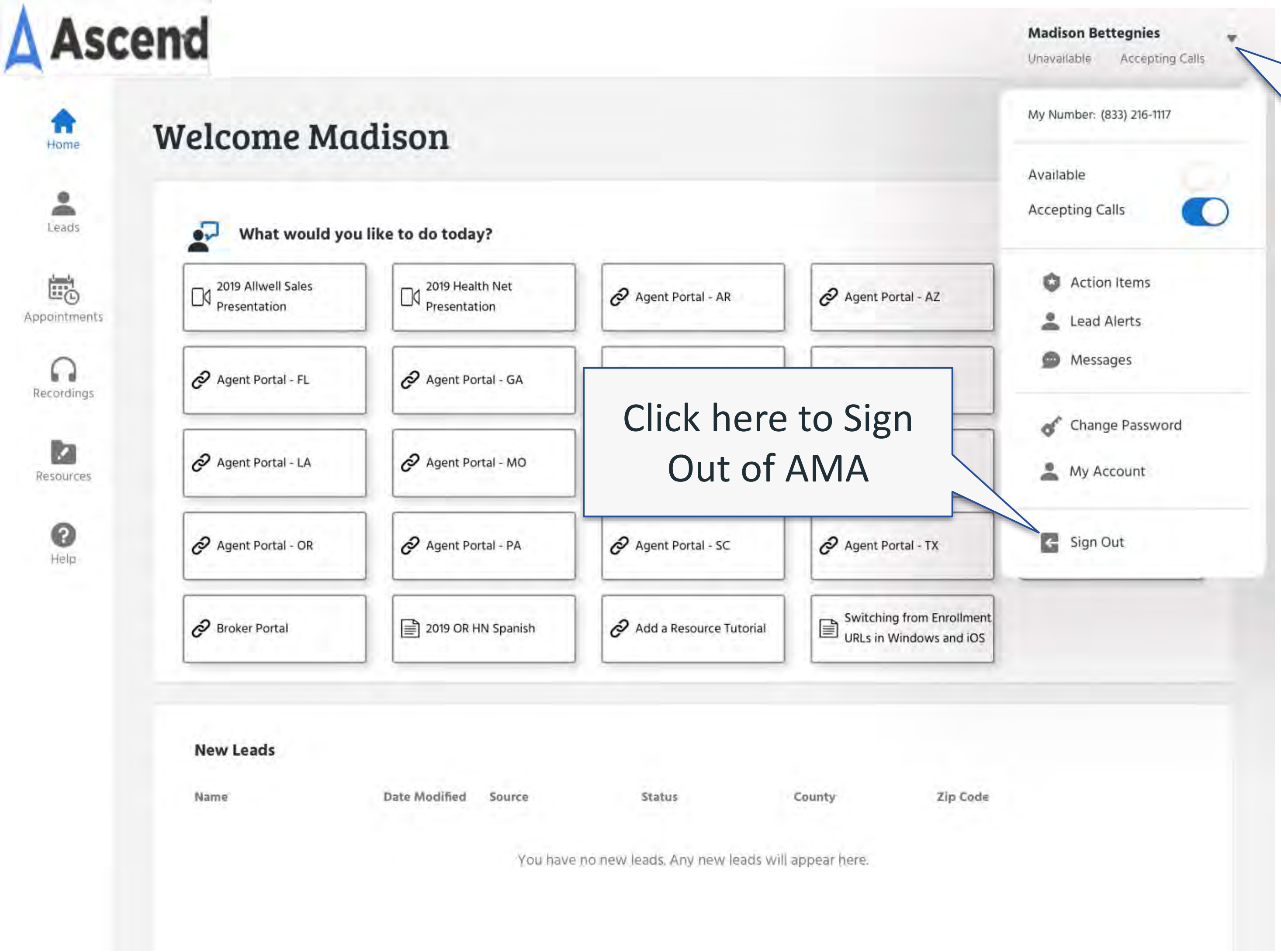
Home Screen

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



SIGNING OUT

Sign Out of AMA



Click here to Sign Out of AMA

Click the down arrow to bring up the dropdown menu

THANK YOU FOR ATTENDING THE TRAINING!