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 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
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)

Forgot your password? Tap here to get new one.

Then click here to sign in.
Downloading AMA

First, select the Download tab.

Welcome to Ascend

Ascend helps you help your prospect and make the sale. You get the latest quoting and marketing materials, vital office communications, electronic applications, compliance protection and more. Make your life as an insurance professional less complicated and concentrate on your personal selling style with Ascend.

Tap here to install on an iPad.

Click here to install on a Windows device.
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

- **Manual Sign In**
- **Touch ID Sign In**
- **Tap here to contact the Helpdesk**
- **Tap here to enter Sandbox (test) mode**
- **Tap here to get a new Password**
- **Version Information**
Home Screen

Your name should appear here

And here

Welcome Madison

What would you like to do today?

- Profile Facts
- Summary of Benefits
- Medicare.gov
- Summary of Benefits - DSNP
- Sales video
  - Spanish

New Leads

<table>
<thead>
<tr>
<th>Name</th>
<th>Date Modified</th>
<th>Source</th>
<th>Status</th>
<th>County</th>
<th>Zip Code</th>
</tr>
</thead>
</table>

You have no new leads. Any new leads will appear here.

View All Leads

Upcoming Appointments
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.
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
New Action Item

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

Click here to view the notification.

A number here shows how many action items you must view.

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 Screen

## New Leads

<table>
<thead>
<tr>
<th>Name</th>
<th>Data Modified</th>
<th>Source</th>
<th>Status</th>
<th>County</th>
<th>Zip Code</th>
</tr>
</thead>
<tbody>
<tr>
<td>Doe, Jane</td>
<td>May 26, 2020</td>
<td></td>
<td></td>
<td>Monroe</td>
<td>47403</td>
</tr>
</tbody>
</table>

## All Leads

<table>
<thead>
<tr>
<th>Name</th>
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<td>May 26, 2020</td>
<td></td>
<td></td>
<td>Monroe</td>
<td>47403</td>
</tr>
<tr>
<td>Jo, Harper</td>
<td>May 12, 2020</td>
<td>Self Generated</td>
<td></td>
<td>Los Angeles</td>
<td>90315</td>
</tr>
<tr>
<td>Test, cray</td>
<td>Nov 13, 2019</td>
<td>Self Generated</td>
<td></td>
<td>Los Angeles</td>
<td>90915</td>
</tr>
<tr>
<td>Test, harper</td>
<td>Mar 26, 2020</td>
<td>Self Generated</td>
<td></td>
<td>Los Angeles</td>
<td>90915</td>
</tr>
<tr>
<td>Test, Sam</td>
<td>Dec 06, 2019</td>
<td>Self Generated</td>
<td></td>
<td></td>
<td>72634</td>
</tr>
<tr>
<td>Test, John</td>
<td>Sep 19, 2019</td>
<td>Self Generated</td>
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<tr>
<td>Test, Test</td>
<td>Nov 13, 2019</td>
<td>Self Generated</td>
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<td></td>
<td>75390</td>
</tr>
<tr>
<td>Text, Harper</td>
<td>Apr 27, 2020</td>
<td>Self Generated</td>
<td></td>
<td></td>
<td>47403</td>
</tr>
</tbody>
</table>

**Search Leads Here**

**Select a Lead to View it**
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
Meetings are defined as your interactions with prospects while using Ascend. You can view upcoming and past meetings in this section.

Past meetings held will be viewable 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
This section provides you with personal information about the lead.

Click on the lead to link the two leads together.

Click here to add a new Note to your 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.
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

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

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

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.
Scope Of Appointment Acceptance Email

We could not find any information about the sender's identity. It is possible that the email was sent by an unknown user.

Please click the provided link to review the Scope of Appointment. If you approve or reject the Scope of Appointment, it must be approved before you can discuss health plans with the agent named in the form.

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.
Do you approve of this Scope of Appointment?

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 those authorized representative.

Products to Discuss

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

- 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

Prospect View of the eSOA

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.

Yes

They will tap ‘Yes’ to approve the meeting or ‘No’ to reject it.

No

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
There are two types of appointments in Ascend. Home visits can be identified by the icon of a house. Seminars will display this icon. You can also select past appointments to view their details. Select an upcoming appointment to view its 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

You can verify who did and did not attend a seminar.

Clicking here will take you to a larger map.
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 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
For help with Ascend, please contact the Helpdesk.

866.338.7772
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

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

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.
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’
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
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

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

Will take you to MyMedicare.gov

Will take you to the next lookup tool
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
The beneficiary will need to read through the permission statement before allowing Mymedicare.gov to access their Medicare data.

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

Clicking Yes will take you to the lookup tool.

Clicking No will take you to the next lookup tool.

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

Clicking Yes will take you to the lookup tool.

Clicking No will take you to the next lookup tool.
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 find 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
Do you have a doctor you want covered?

- 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.
When doing an advanced search, you can enter in more of the doctor’s personal details, services, coverage, and location.
Click ‘More’ to view Doctor Details

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.
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
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.
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 send a Quick Quote.

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

Click here to view more details about a plan.
Plan Details

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 return to the previous screen

Click here to start an enrollment

Click here to start an enrollment
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’.
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.

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

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

Click ‘Apply Now’ to submit the Enrollment Application.

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

You can also email them their confirmation number.

Click here to print the application summary & confirmation number.

Make sure to give them the confirmation number.
Allwell & HealthNet Plans

This is where you start the VBE Program

Make sure to give them the confirmation number

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
Inviting 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.

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

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.

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

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

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 Bettaghes

Centene - Managed Health Services - Indiana

Call 234-552-1452

mbettaghes@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 Bettaghes wants to share health insurance options.

Centene - Managed Health Services - IN <donotreply@quotes.isf.io>

To • Madisson Bettaghes

10:39 AM

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

• Email their confirmation number
• Print their application summary
• Initiate VBE
On the Enrollments tab, you can view the status of past applications.

Toggle to the VBE tab to view information regarding past VBEs.

Toggle to the Quick Quotes tab to view information regarding sent Quick Quotes.
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.
  o Visit the portal
  o Log in with your provided Ascend Credentials
  o Click on “View Enrollments”
  o 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.
SAVED APPLICATIONS
Saved Applications

On this screen, you can view saved enrollments.

You can edit or delete the application here.

**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

• 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
Sign in

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

Read the pop-up message then click ‘OK’ to continue.
Once logged in, you will see a banner across the top in red lettering with yellow highlight.
Sign Out of AMA

Click the down arrow to bring up the dropdown menu

Click here to Sign Out of AMA
THANK YOU FOR ATTENDING THE TRAINING!