



Welcome to the  
**Ascend Virtual Sales Office  
Training Series**



# Today's Agenda



- Introduction
- Housekeeping
- Scope of Appointment Solution
- Ascend for iPad and Windows
- Completing an electronic enrollment with Ascend
- Ascend Real Time Manager (ARM)



# Housekeeping



- Technical support for GoToWebinar– contact Citrix Customer Care at 800-263-6317
- If technical assistance is needed for Ascend during the webinar, please contact the Ascend Help Desk at 866-338-7772
- Today’s webinar is recorded
- Questions? Please type them in the box provided on the right of your screen. They will be addressed at the end as time allows.
- Please do not fill out any applications today – live environment
- Remember to submit your survey at the end please!



Streamline  
what you do





# Telephonic Scope of Appointment



- No more paper Scopes to keep up with!
- Complete the process in minutes
- Easy to use system - available in both English and Spanish
- Add SOA to your Ascend meeting details for easy tracking
- Intuitive prompts in the system to help guide the agent



# FAQ's About the SOA



- The phone line will be available 24/7 starting October 1<sup>st</sup>
- The same rules apply to the telephonic SOA as they do the paper SOA
- You are allowed to conference in with your beneficiary and help them through the process
- Yes! You can confirm that your beneficiary called in and completed their part
- Set up as many Scopes as you like at one time

# Scope of Appointment Agent Cards



## STEP 1

aetna

**1-844-334-2247**

### Requesting a Scope of Appointment ID

**Have this information ready before calling:**

1. NPN number
2. Beneficiary's phone number (area code first)
3. Beneficiary's full name
4. Initial Beneficiary contact (call center, walk-in, etc.)
5. Appointment location
6. Appointment date (MM/DD/YY)
7. Appointment time (HH/MM)
8. Purpose of appointment
9. Record Scope of Appointment ID

**Prompts will guide you. Beneficiaries can go directly into the verification process.**

## STEP 2

aetna

**1-844-334-2247**

### Confirming a Scope of Appointment

**Have this information ready before calling appointment verification line:**

1. Have Beneficiary on phone line
2. Enter Scope of Appointment ID
3. Reason appointment was not verified before meeting (if applicable)
4. Beneficiary's full name
5. Appointment details: location, date, time, purpose

**Prompts will guide you. Beneficiary will need to verify appointment details and attest they understand and agree to appointment.**



# Ascend Virtual Sales Office

How Ascend will Help You



# What is the Ascend Virtual Sales Office?

- A high-powered, professional tool
- Encompasses online quoting and application capabilities within an easy-to-follow workflow
- A tool to help you keep track of your prospects

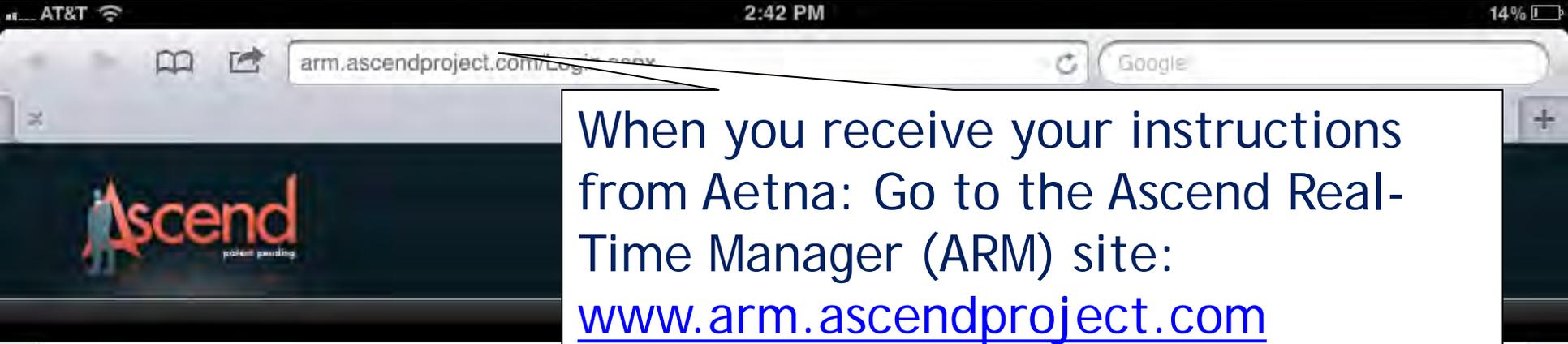


# VSO for iPad & Windows



- In addition to the iPad application, you are now able to install the Windows version of Ascend VSO on your PC or Windows based tablets
- Functionality of this program is the same as the iPad *with the exception* of recordings
- The Windows version of Ascend VSO has a slightly different look and feel since it is running on a different operating system than the iPad app.
- Downloading Ascend is easy on both platforms!

# Downloading Ascend



When you receive your instructions from Aetna: Go to the Ascend Real-Time Manager (ARM) site: [www.arm.ascendproject.com](http://www.arm.ascendproject.com) (from iPad if you are using the app or PC if you are using Windows version)

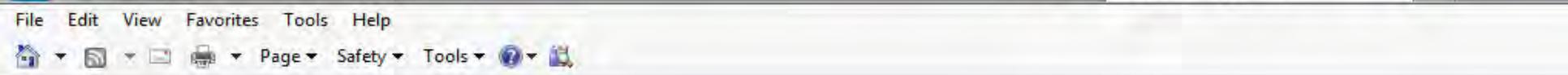
Email:

Password:

[Can't access your account?](#)

Enter Username and Password here to Sign in

# iPad Version



Return to ARM

## Welcome to Ascend!

Tap on Download and then 'Install' for Ascend app on iPad and...

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

...also for the User Guide



### Ascend iOS

DOWNLOAD

Version 2014.3.08.15  
Released: 8/29/2014



### Mobile Application User Guide

DOWNLOAD

Version 2013.4.12.04  
Released: 1/2/2014



# Windows Version



← → ↻ 🏠 <https://arm.ascendproject.com/Store/>

Return to ARM

Ascend Windows version. Download to PC or device operating Windows.

## 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.

...also for the User Guide

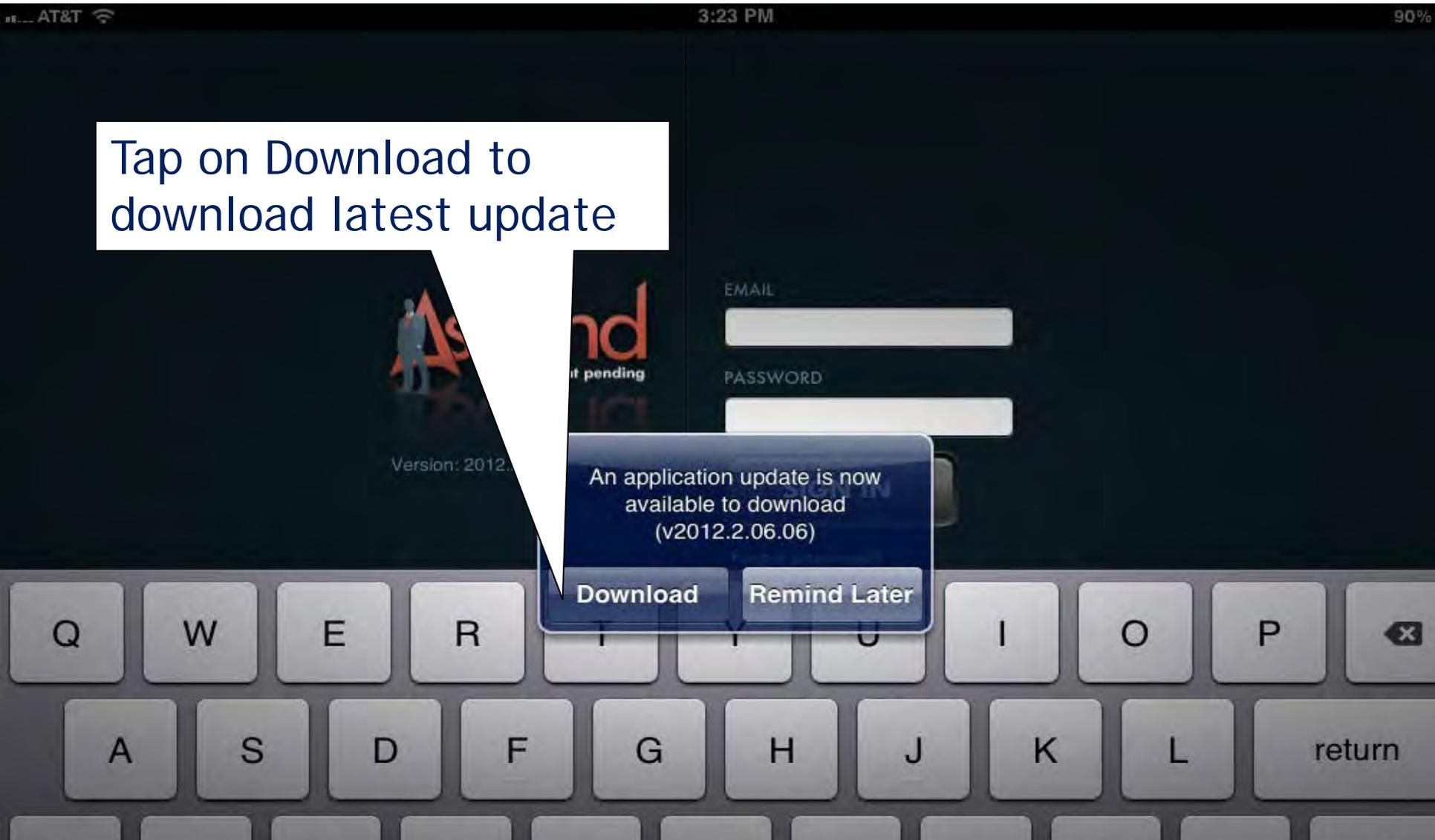
	<b>Ascend Windows</b> <a href="#">DOWNLOAD</a> Version 2015.3.07.05 Released: 8/3/2015		<b>Mobile Application User Guide</b> <a href="#">DOWNLOAD</a> Version 2013.4.12.04 Released: 1/2/2014
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# iPad Application Updates



Tap on Download to download latest update

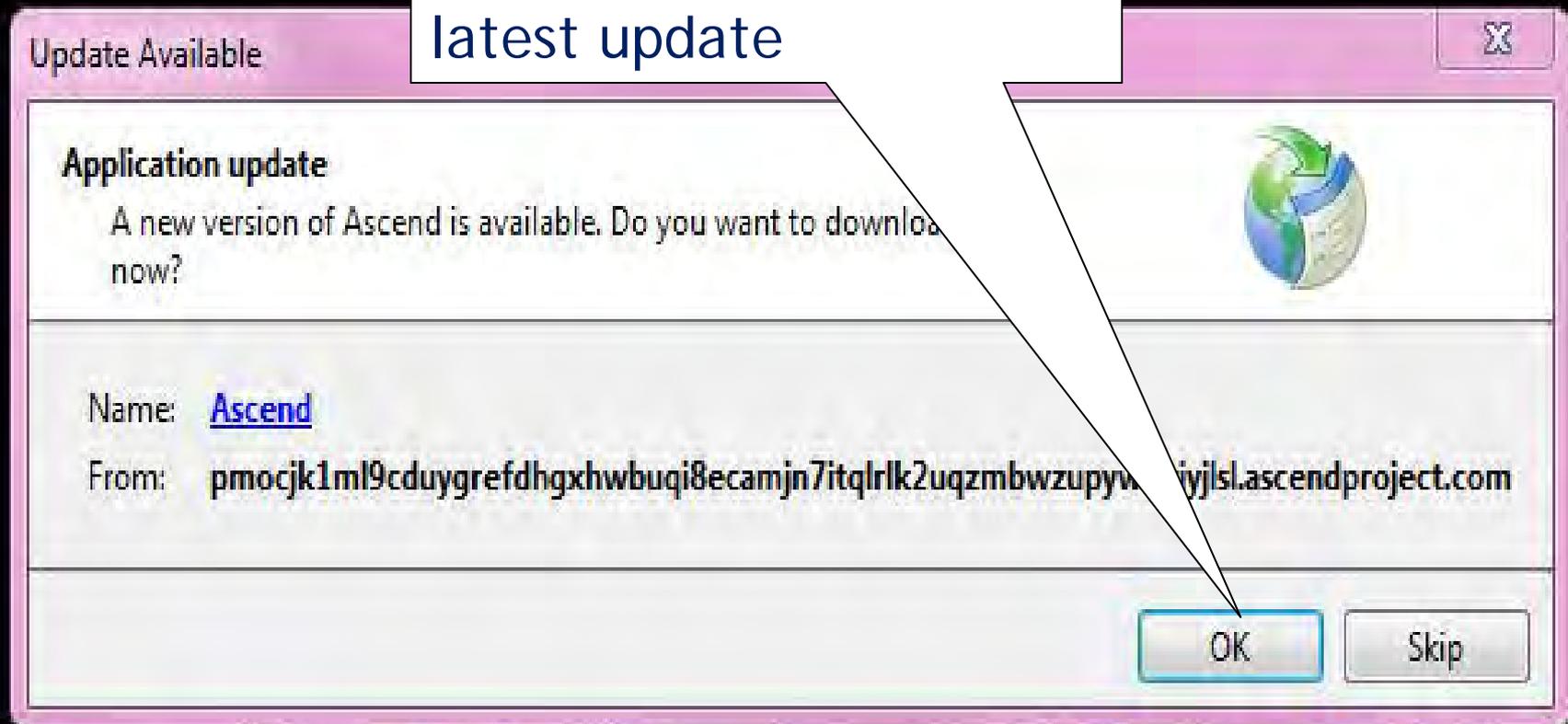




# Windows Application Updates



Click OK to download latest update





# Navigating the Ascend Virtual Sales Office: The Basics



# iPad Log In Screen



AT&T 2:55 PM 17%



Version: 2012.2.06.05

EMAIL

PASSWORD

[Forgot password?](#)

# Windows Log In Screen



Recycle Bin 64bit Staging Communic... IS\_EDU\_Asc... Workbook... GoToTrain...

Adobe Reader X Employee Directory MGC - Product... GoToWebi...

iTunes Recording... IS\_EDU\_Asc... Ascend Training\_A...

Mozilla Firefox Reporting... Mod 6 7 MASTER P...

QuickTime Player GoToMeet... SCREENSH...

Google Chrome Supervisors Stonebridge LA OB Script

ASCEND

Ascend  
patent pending

Version: 2014.3.09.01

Forgot Password? Help

sign in

Login with your email username and password.

EMAIL:

PASSWORD:

Click on the Ascend program on your desktop.

# iPad Navigation Areas



Verizon 9:18 AM 89%

Ascend patent pending

PREV MESSAGES 3/3 NEXT

AGENT M. Bentley

**From:** Matt Bentley  
**Published:** Apr 23, 2015  
**Expires:** Jan 01, 2016

WELCOME TRAINING AT... ES! This is a test message

**Access Messages**

**Name of agent logged in**

**Ascend Menu:**

- Messages
- Leads
- Resources
- Recordings
- Passwords
- Sign Out

**Refresh Messages**

ACKNOWLEDGED ✓



# Windows Navigation Areas



The screenshot shows the ASCEND software interface. At the top, there is a header bar with 'ASCEND' on the left, 'AGENT: Matt Bentley' in the center, and a settings gear icon on the right. Below the header, there are three main navigation tabs: 'MESSAGES', 'LEADS', and 'MEETING'. The 'MESSAGES' tab is currently selected, showing a message titled 'Message 1/3'. The message content includes a 'From:' field with 'Todd H', a 'Publish' date of 'Jul 02', and an 'Expire' date of 'Aug 01'. Below the message, there is a large text area with the heading 'PLEASE UPDATE YOUR' and a URL <https://arm.ascendproject.com>. At the bottom of the message, there is a button labeled 'Acknowledged' with a checkmark icon. Five callout boxes with blue text provide instructions: 'Start a Meeting here!' points to the 'MEETING' tab; 'Resources and settings are here!' points to the settings gear icon; 'Get to your Leads by clicking here' points to the 'LEADS' tab; 'Click here to Acknowledge that you have read the message.' points to the 'Acknowledged' button; and a fifth callout box points to the 'From:' field of the message.

ASCEND AGENT: Matt Bentley

MESSAGES LEADS MEETING

Message 1/3

From: Todd H  
Publish Jul 02,  
Expire Aug 01

PLEASE UPDATE YOUR

<https://arm.ascendproject.com>

Acknowledged ✓

Start a Meeting here!

Resources and settings are here!

Get to your Leads by clicking here

Click here to Acknowledge that you have read the message.

# iPad Messages



Verizon 9:18 AM 89%

Ascend patent pending

PREV MESSAGES 3/3 NEXT AGENT M. Bentley

**From:** Matt Bentley  
**Published:** Apr 23, 2015  
**Expires:** Jan 01, 2016

WELCOME TRAINING ATTENDEES! This is a

ACKNOWLEDGED ✓

Refresh icon

•Tap Next button to move to next note, or  
•Swipe finger across screen

Messages:  
•Sent by administrator or manager.  
•Marked with published and expiration date.

Refreshing Messages:  
This icon refreshes your iPad with any new messages received.

Message Acknowledgement:  
Tap acknowledgement that you have read BEFORE you can start new meeting.

# Windows Messages



ASCEND AGENT- Matt Bentley

MESSAGES LEADS MEETING

Message 1/3

**From:** Todd Brooks  
**Published:** Jul 02, 2015  
**Expires:** Aug 01, 2015

**PLEASE UPDA**

Ascend was recently updated to improve the prog  
connecting to the enrollment functions, please sig  
trouble doing this you can go to:

<https://arm.ascendproject.com>

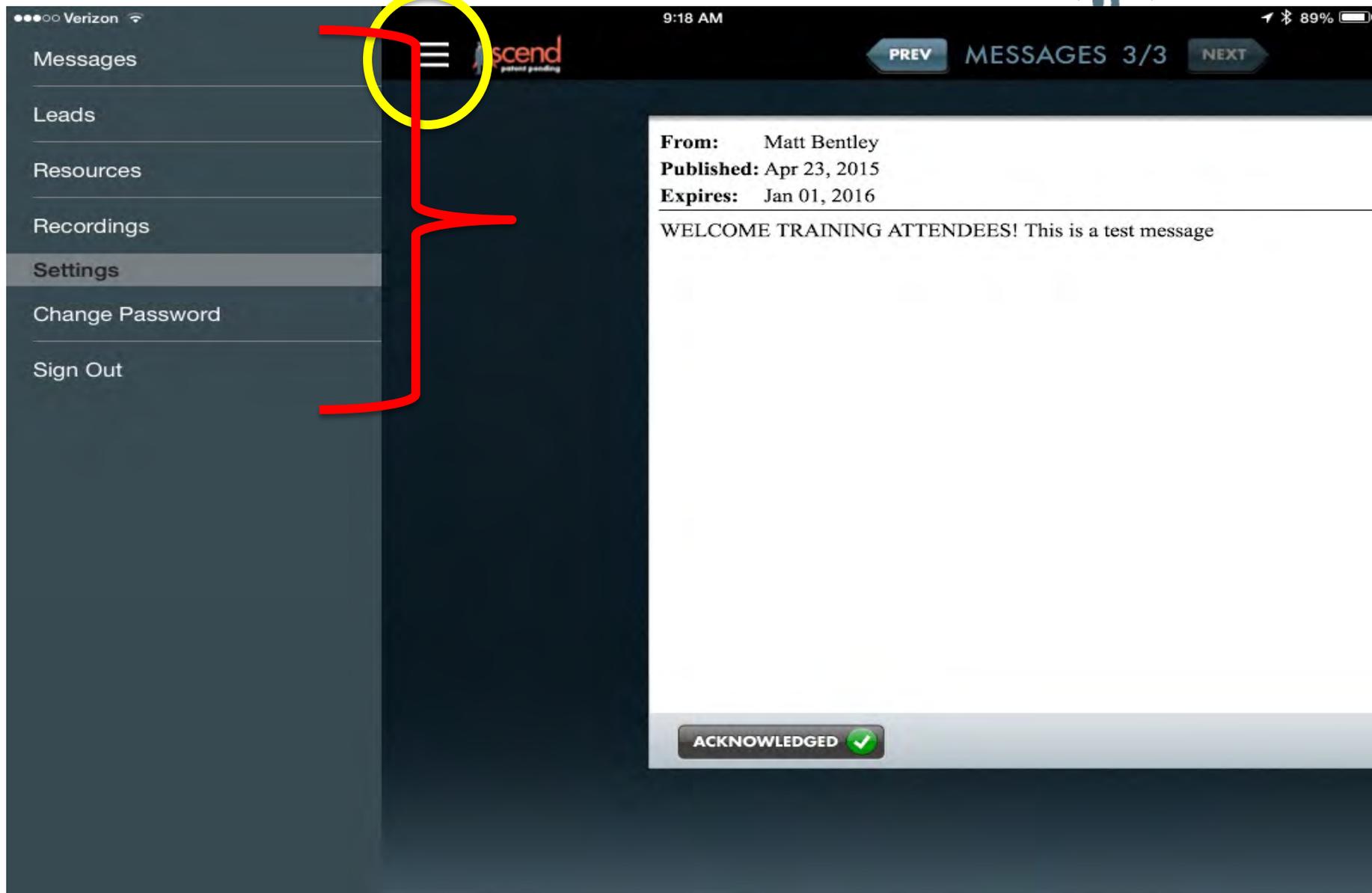
Click here to read next message.

Click here to Acknowledge that you have read the message.

Click here to refresh messages.

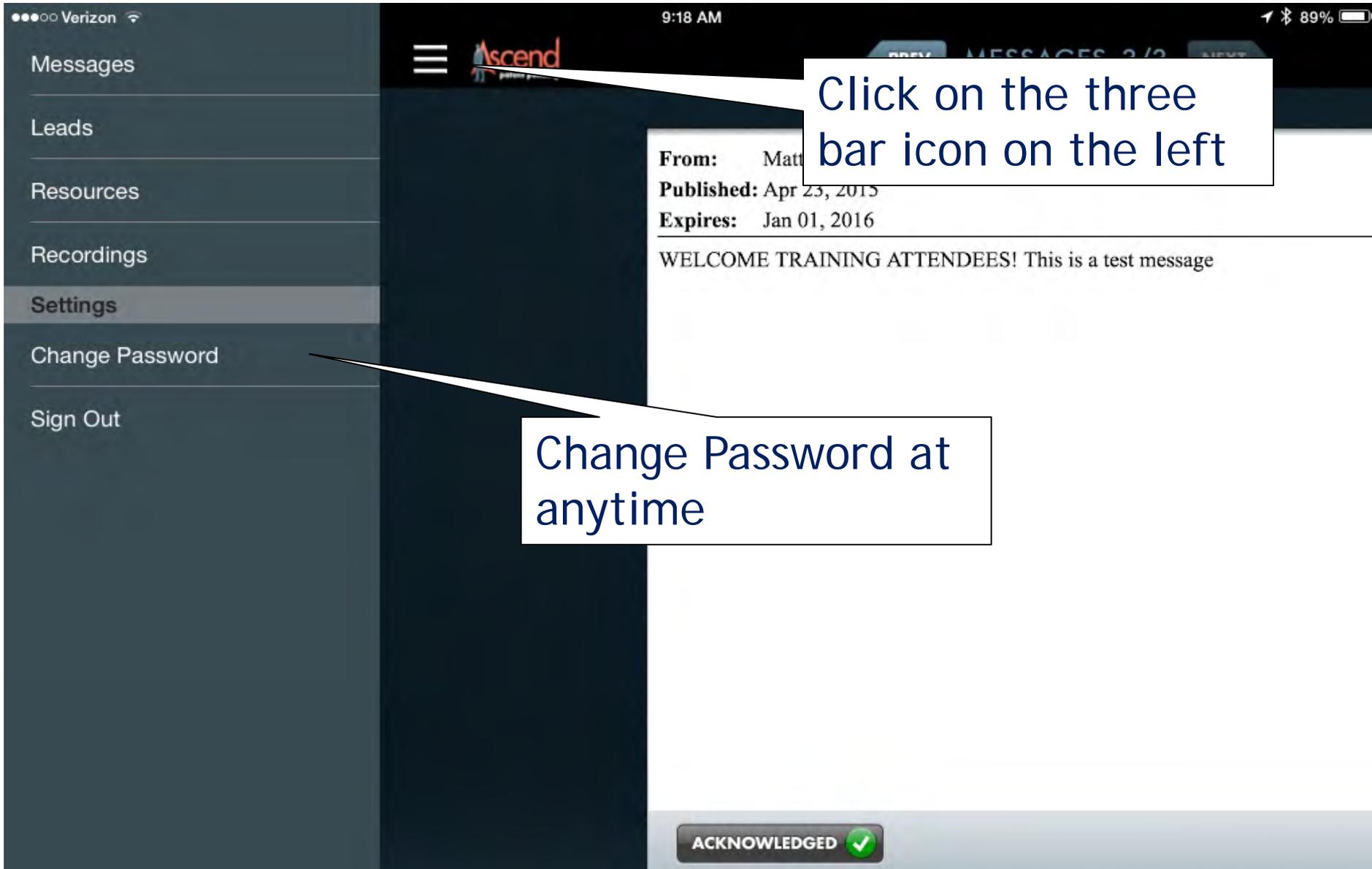
Acknowledged ✓

# iPad Menu Bar





# iPad Password Change



Click on the three bar icon on the left

Change Password at anytime

# Windows Password Change



Click on 'Change Password' whenever you wish to do so.

Enter your new password and follow these parameters.

## CHANGE PASSWORD

CURRENT PASSWORD:

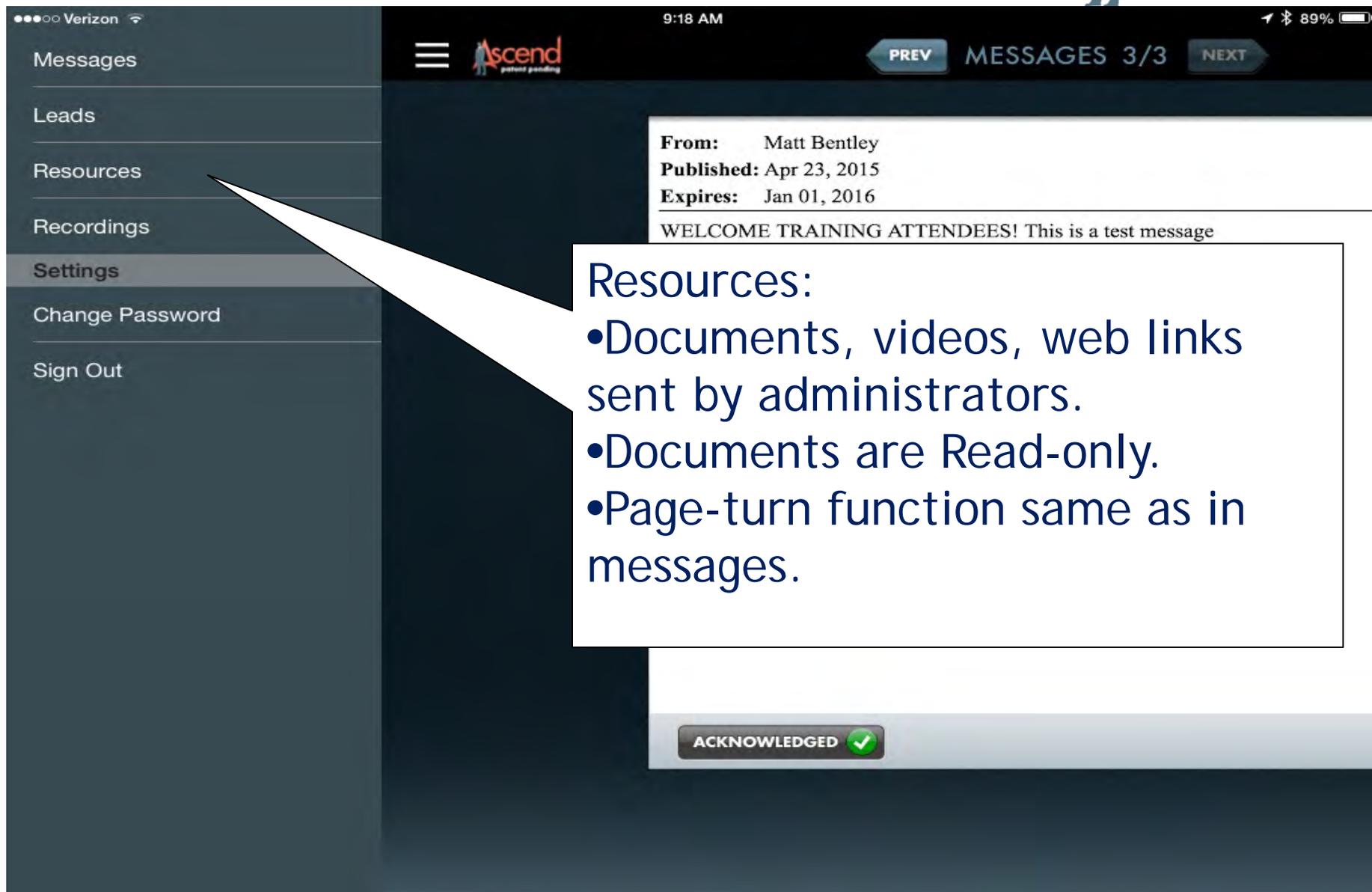
NEW PASSWORD:

RE-ENTER PASSWORD:

done

- \* At least 8 characters in length
- \* 1 uppercase character
- \* 1 lowercase character
- \* 1 numeric character

# iPad Resources



## Resources:

- Documents, videos, web links sent by administrators.
- Documents are Read-only.
- Page-turn function same as in messages.

Resources



Miscellaneous

Sales Presentations



Hide Resources: Tap to hide the Resource bar on left if you want full screen to show plan information.

SE

VIE Here

Medicare Advantage Prescription Drug Plans  
0 plans

Prescription Drug Plans  
4 plans

COMPARE UP TO 3 PLANS

Check to compare **AETNA MEDICARE RX SAVER (PDP)**

Premium (Monthly Price) <b>\$27.00</b>	Total Estimated Costs  <b>\$324</b>
---	---

**ENROLL** **VIEW DETAILS**

Check to compare **FIRST HEALTH PART D VALUE PLUS (PDP)**

Premium (Monthly Price)	Total Estimated Costs 
-------------------------	---



Zoom out (-)

Zoom in (+)

Welcome, Richard W

SEARCH PROFILES & ENROLLMENTS

START A N

Show Resources: Tap to make Resources section reappear

PROFILE

HEALTH

DRUGS

### VIEW AND COMPARE PLANS

Here are the plans available in the ZIP code entered. They are sorted in order of lowest estimated costs, to help you find

Medicare Advantage Prescription Drug Plans  
0 plans

Prescription Drug Plans  
4 plans

Medicare Ad  
0 plans

COMPARE UP TO 3 PLANS

# iPad Resources



Resources

4:16 PM 95%

Welcome, Richard Widen | [My Account](#) | [Sign Out](#)

**SEARCH PROFILES & ENROLLMENTS** **START A NEW CONSULTATION** **ENROLL A NEW BENEFICIARY**

PROFILE HEALTH DRUGS COMPARE PLANS

**VIEW AND COMPARE PLANS**  
Here are the plans available in the ZIP code entered. They are sorted in order of lowest estimated costs, to help you find the best value.

Medicare Advantage Prescription Drug Plans 0 plans Prescription Drug Plans 4 plans Medicare Advantage Plans 0 plans

COMPARE UP TO 3 PLANS Sort By

Check to compare **AETNA MEDICARE RX SAVER (PDP)**

Total Estimated Costs	Medicare Star Rating
\$324	★★★★☆

Check to compare **HEALTH PART D VALUE PLUS (PDP)**

Total Estimated Costs	Medicare Star Rating
\$506	★★★★☆

Check to compare **FIRST HEALTH PART D PREMIER PLUS (PDP)**

Premium (Monthly Price)	Total Estimated Costs	Medicare Star Rating
\$102.20	\$1,226	★★★★☆

Check to compare **AETNA MEDICARE RX PREMIER (PDP)**

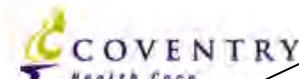
Miscellaneous

Sales Presentations

Resources End Meeting

All resources can be accessed here. Tap on a Folder to find a resource.

# iPad Resource Email



- Home
- Find Benefits
- Apply for Extra Help
- Find Applications

To email document, tap on envelope

## Get Started Now!

There are benefits you may be missing! BenefitsCheckUp helps you find and enroll in public and private benefits programs. You can also find information on Medicare Prescription Drug Coverage including an online application for the Extra Help. It's simple and free and always includes the most up-to-date information.

 **Find Benefits Programs**

Find and enroll in programs that can help save you money.

[Go!](#)

 **Medicare Rx Extra Help**

Apply now for Medicare's Extra Help and also find out if you qualify for other valuable benefit programs.

[Go!](#)

 **Application Forms Center**

Get applications and fact sheets for programs that help pay for prescription drugs and health care.

[Go!](#)

 **Need Help Paying for Food?**

Find the program where you live, get an application and apply today by clicking [here!](#)



Cancel

Link to: Benefits Check-Up Interview/Enrollment Link

Send

To: johnsmith@gmail.com

Co/Bo:

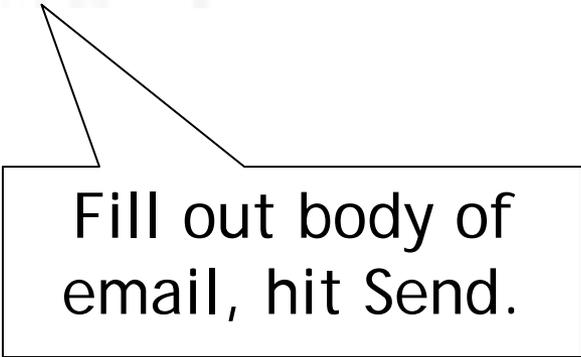
Subject: Link to: Benefits Check-Up Interview/Enrollment Link

Here is the link to the resource you requested on 4/3/2014.

<http://www.BenefitsCheckUp.org/Coventry>

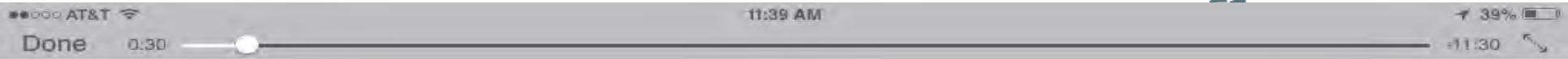
Thanks,  
M. Schable

Sent from my iPad



Fill out body of  
email, hit Send.

# iPad Video Resources



Video Progress Bar

Done: Tap to exit video

Video controls

Volume

Rewind

Play/Pause

Fast Forward



# Windows Resources

The screenshot shows a web application interface for Medicare plans. At the top, there is a blue header bar with the text "Matt Bentley" and a search icon. Below the header, there are three main categories: "Prescription Drug Plans" (4 plans), "Medicare Advantage Plans", and "Medicare Supplement Plans". A callout box points to a "Resources" button in the top right corner. The main content area displays a list of Medicare plans, including "AETNA MEDICARE RX SAVER (PDP)", "FIRST HEALTH PART D VALUE PLUS (PDP)", and "FIRST HEALTH PART D PREMIER PLUS (PDP)". Each plan entry shows the total estimated cost and the Medicare Star Rating. The "Resources" sidebar is open, showing the "aetna" logo and a list of resources: "Miscellaneous" and "Sales Presentations".

Click here to open Resources.

Plan Name	Total Estimated Cost	Medicare Star Rating
AETNA MEDICARE RX SAVER (PDP)	\$324	★★★★☆
FIRST HEALTH PART D VALUE PLUS (PDP)	\$506	★★★★☆
FIRST HEALTH PART D PREMIER PLUS (PDP)	\$1,226	★★★★☆

- Resources
  - aetna®
  - Miscellaneous
  - Sales Presentations

# Windows Resources



Documents are PDFs so you can scroll through...



CENTERS FOR MEDICARE & MEDICAID SERVICES

# Medicare & You

...or you can hit Control 'F' on your keyboard to bring up a key word search.



# Windows Video Resources



ASCEND

CLOSE

Close when you are done.

Volume control is here.

Video controls are located here.



QuickTime

00:04 / 00:04





# Offline Meetings Using Ascend



- When there is no WiFi or 3G/4G/LTE available, conduct your meeting offline with Ascend, keeping the following in mind:
  - You will be able to:
    - Record the meeting.
    - Set the disposition of the meeting.
    - End the meeting which will end the Recording.
    - Capture client information, specifically ZIP code, to allow you to move to the End Meeting screen.
    - Access Messages and Resources that have been previously downloaded to your iPad.



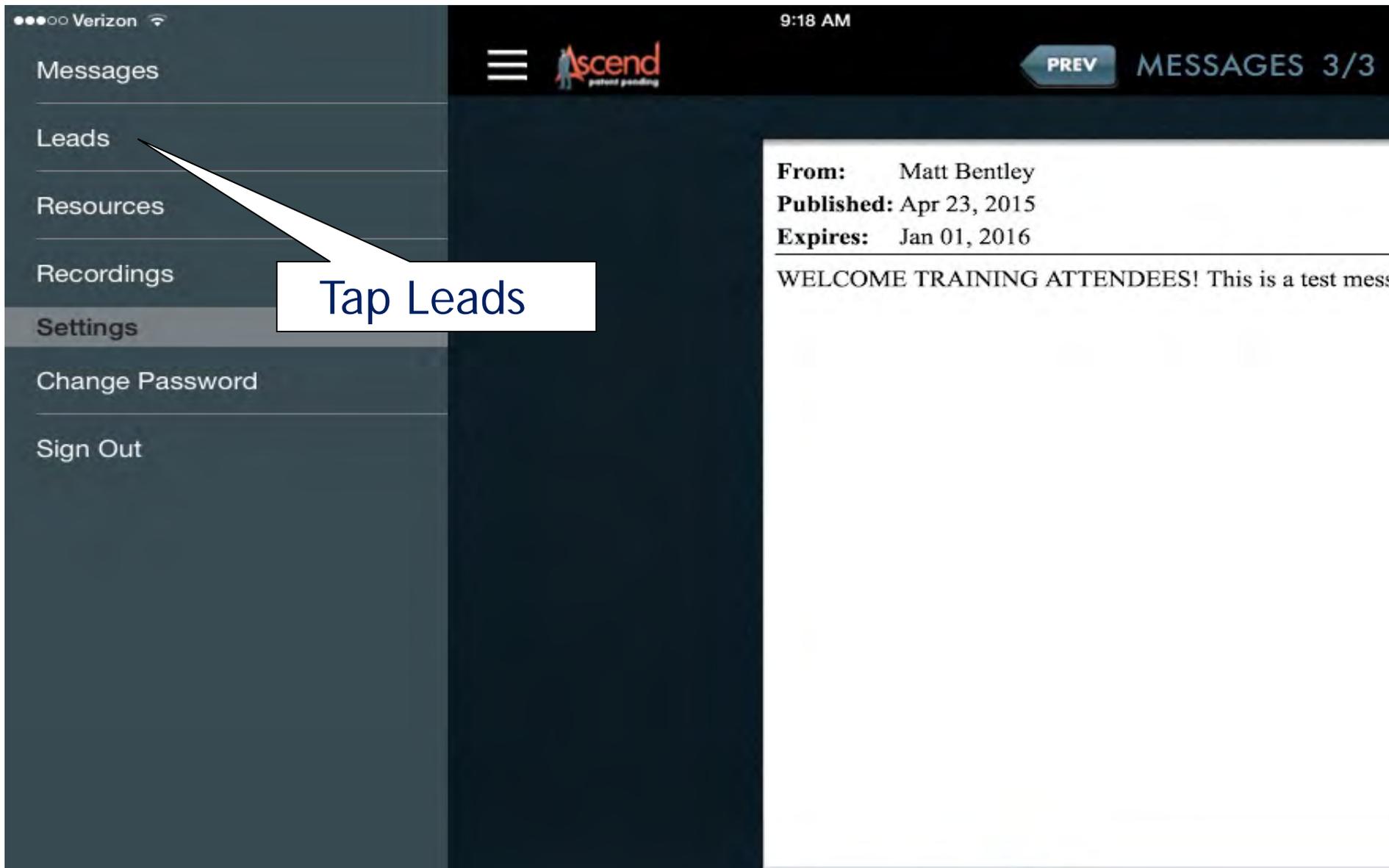
- You will **NOT** be able to:
  - Access the quote engine or web links that require network connectivity.
  - Access messages and resources that are not yet downloaded.
  - Prepare an enrollment application online. That will also need to be paper-based.
  - Upload your meeting recording until you have Wi-Fi or 3G/4G/LTE connectivity.



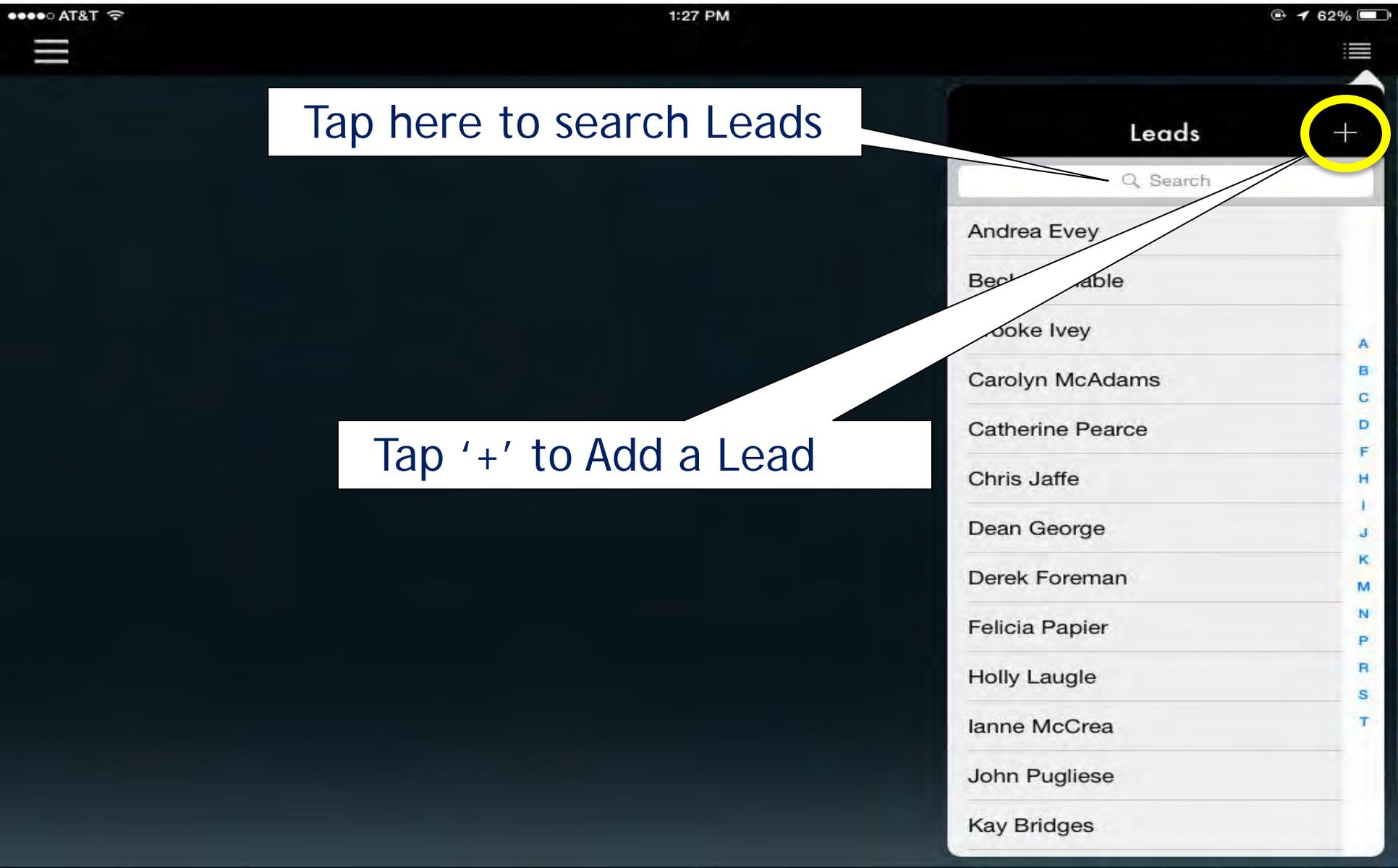
# Navigating the Ascend Virtual Sales Office: Leads & Starting a Meeting iPad Version



# Navigating Leads



# Leads List

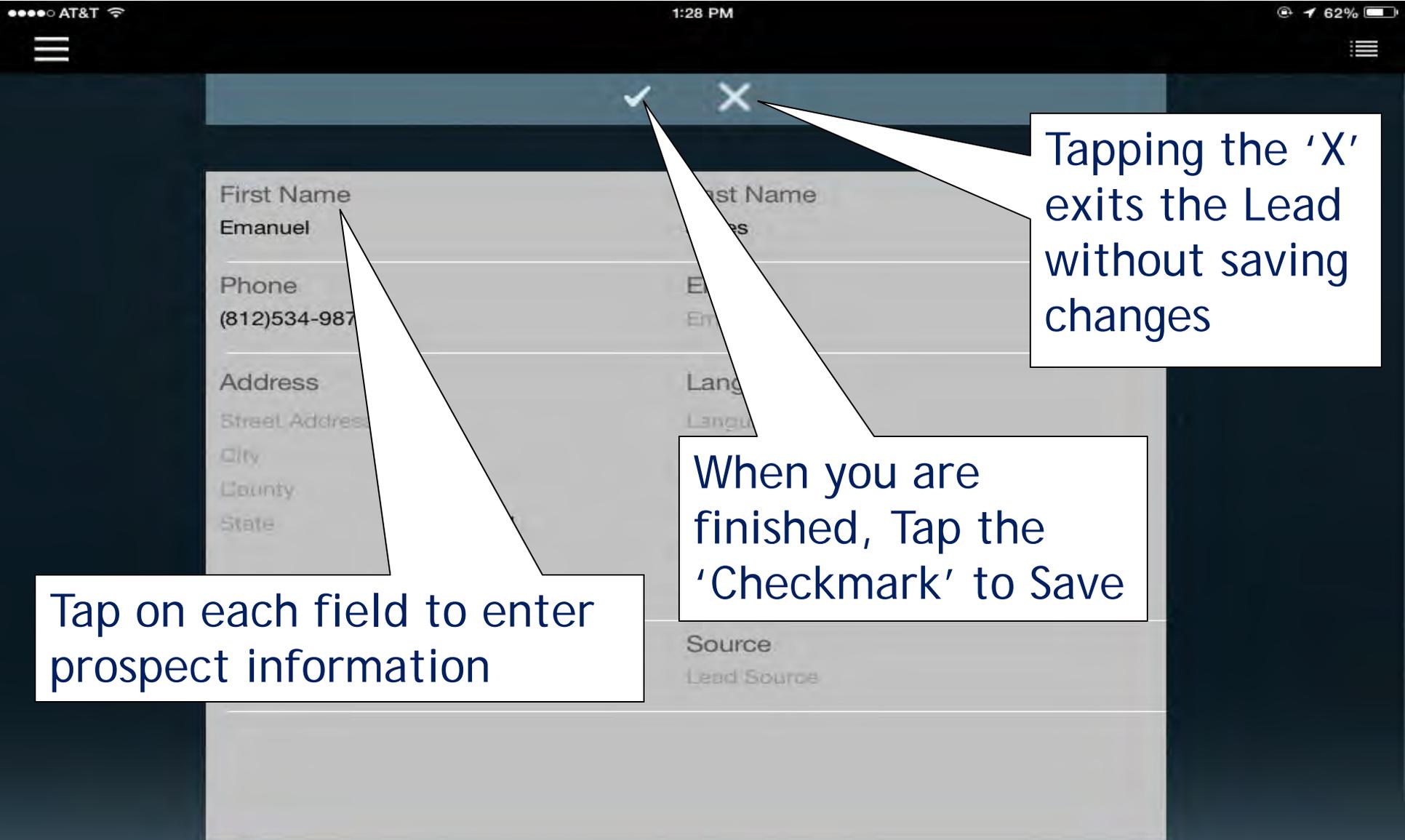


Tap here to search Leads

Tap '+' to Add a Lead

Leads	
Search	
Andrea Evey	
Beck	
Brooke Ivey	
Carolyn McAdams	
Catherine Pearce	
Chris Jaffe	
Dean George	
Derek Foreman	
Felicia Papier	
Holly Laugle	
Ianne McCrea	
John Pugliese	
Kay Bridges	

# Adding a Lead



Tap on each field to enter prospect information

When you are finished, Tap the 'Checkmark' to Save

Tapping the 'X' exits the Lead without saving changes

# Changing Lead Status



AT&T 1:48 PM 57%

✓ ✕

First Name Emanuel Last Name Jones

Phone (812)534-9876

Address Street Address City State Zip

Language Language

Future Mail

Status Lead Status

Not Qualified

Enrolled-2014 AEP

Unassigned

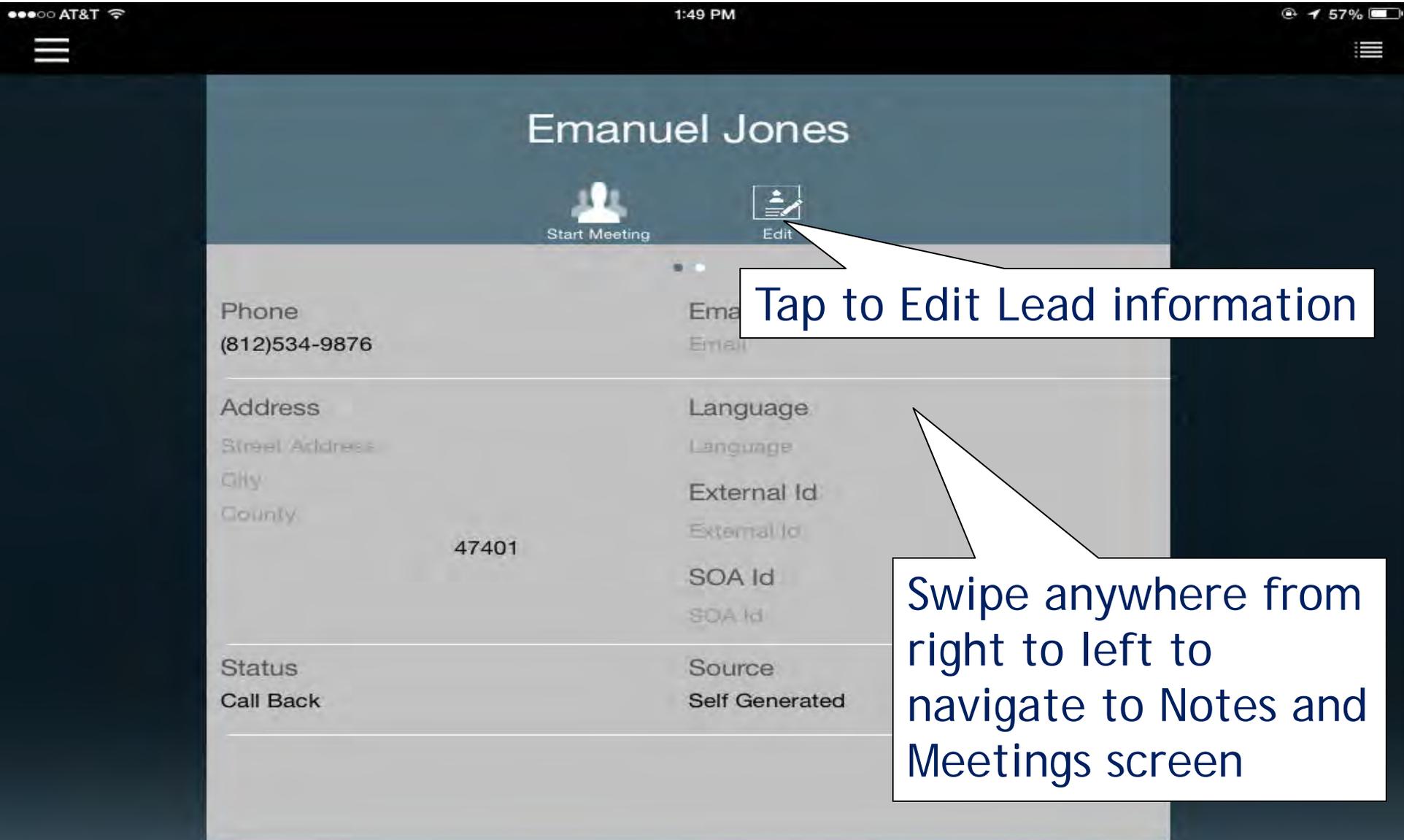
Assigned

Call Back

Amend Lead Status here

Select a Lead Status

# Editing & Navigating to Action Screen





# Actions Screen – Notes & Meetings



●●●● AT&T

1:29 PM



## Emanuel Jones



Start Meeting



Edit

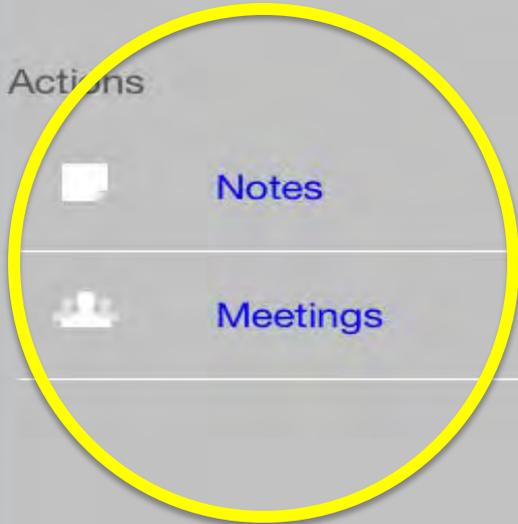
Actions



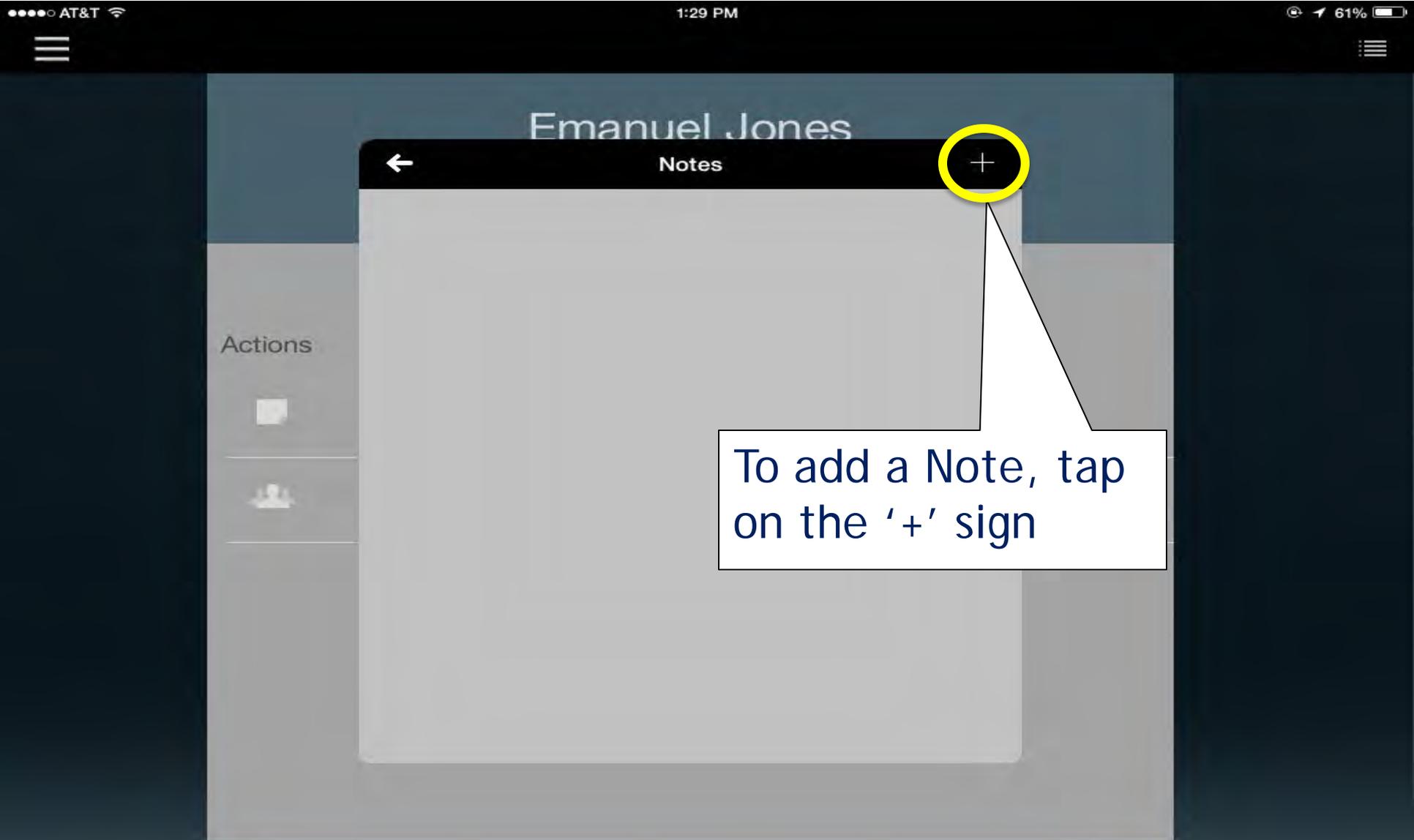
Notes



Meetings



# Adding a Note



To add a Note, tap on the '+' sign



< Notes

Save



Prospect requires follow-up on Monday.

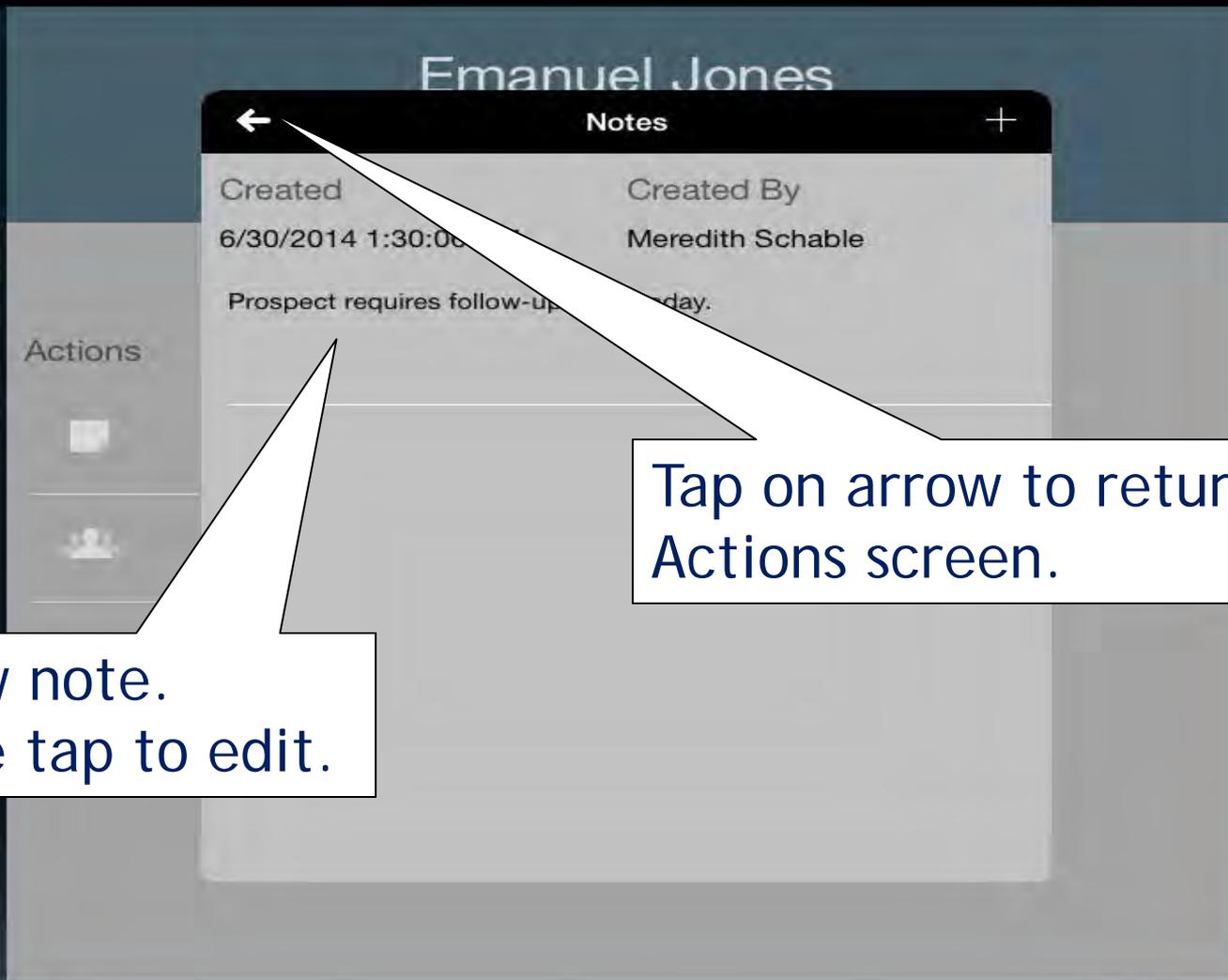
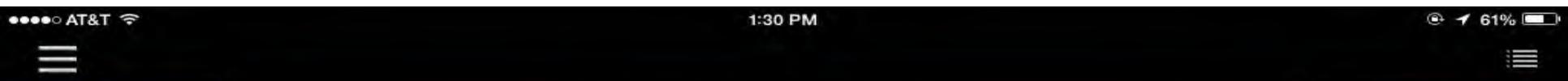
Double tap to raise keyboard and begin typing.

Tap 'Save' when done





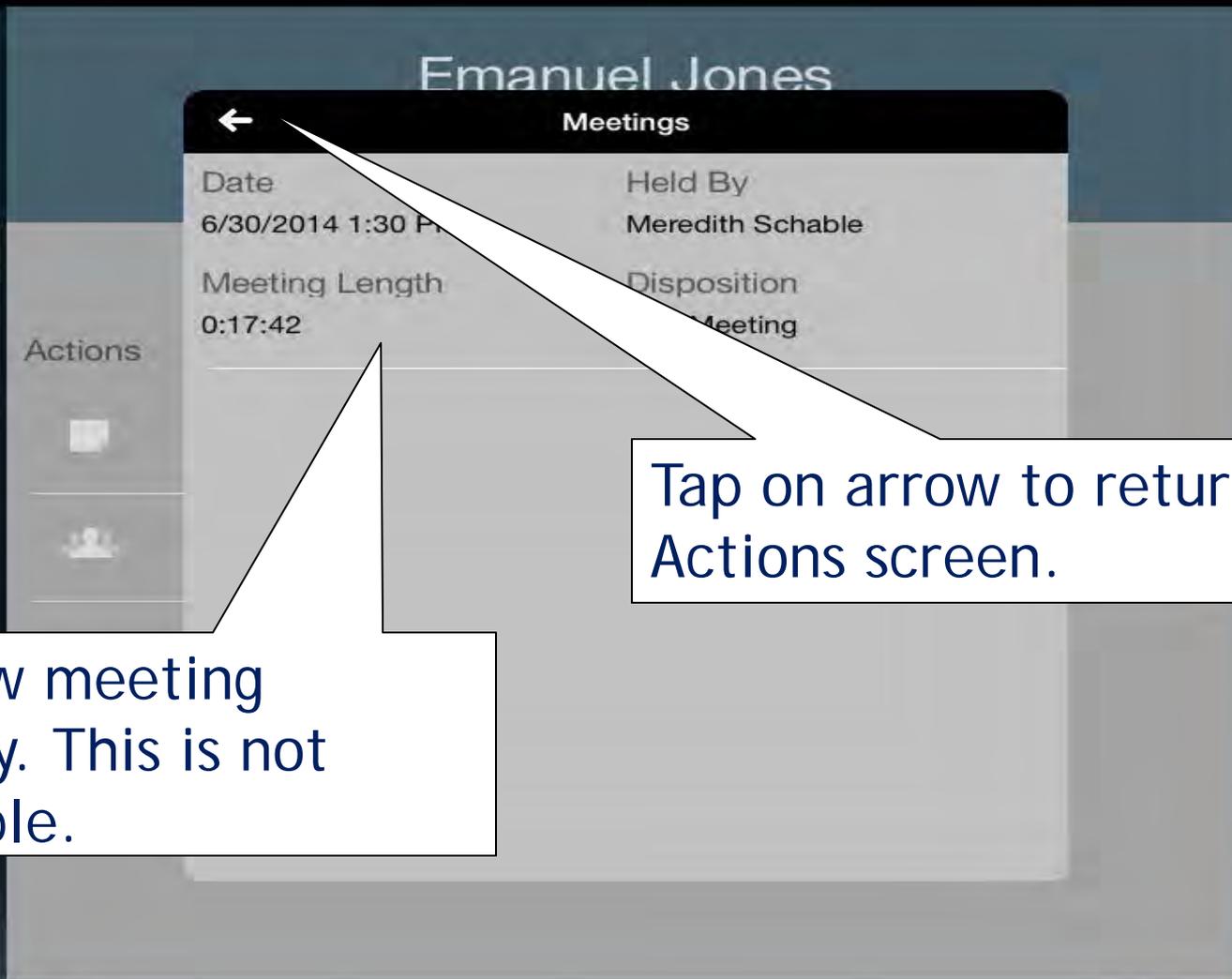
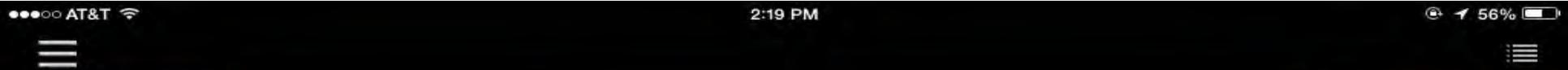
# Reviewing a Note



Review note.  
Double tap to edit.

Tap on arrow to return to  
Actions screen.

# Review Meeting History



Tap on arrow to return to Actions screen.

Review meeting history. This is not editable.

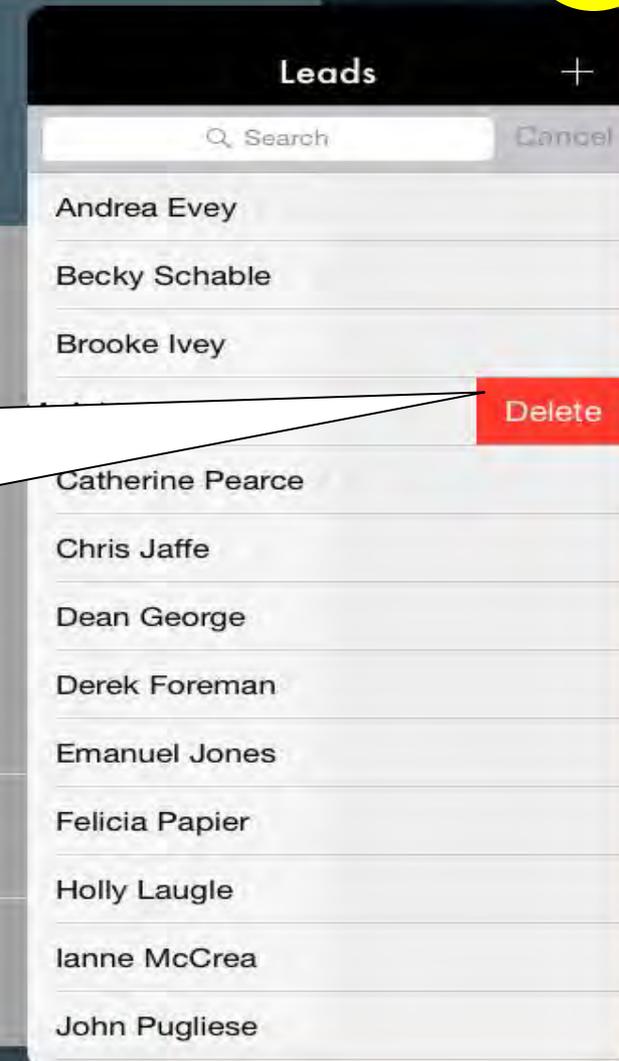
# Deleting a Lead



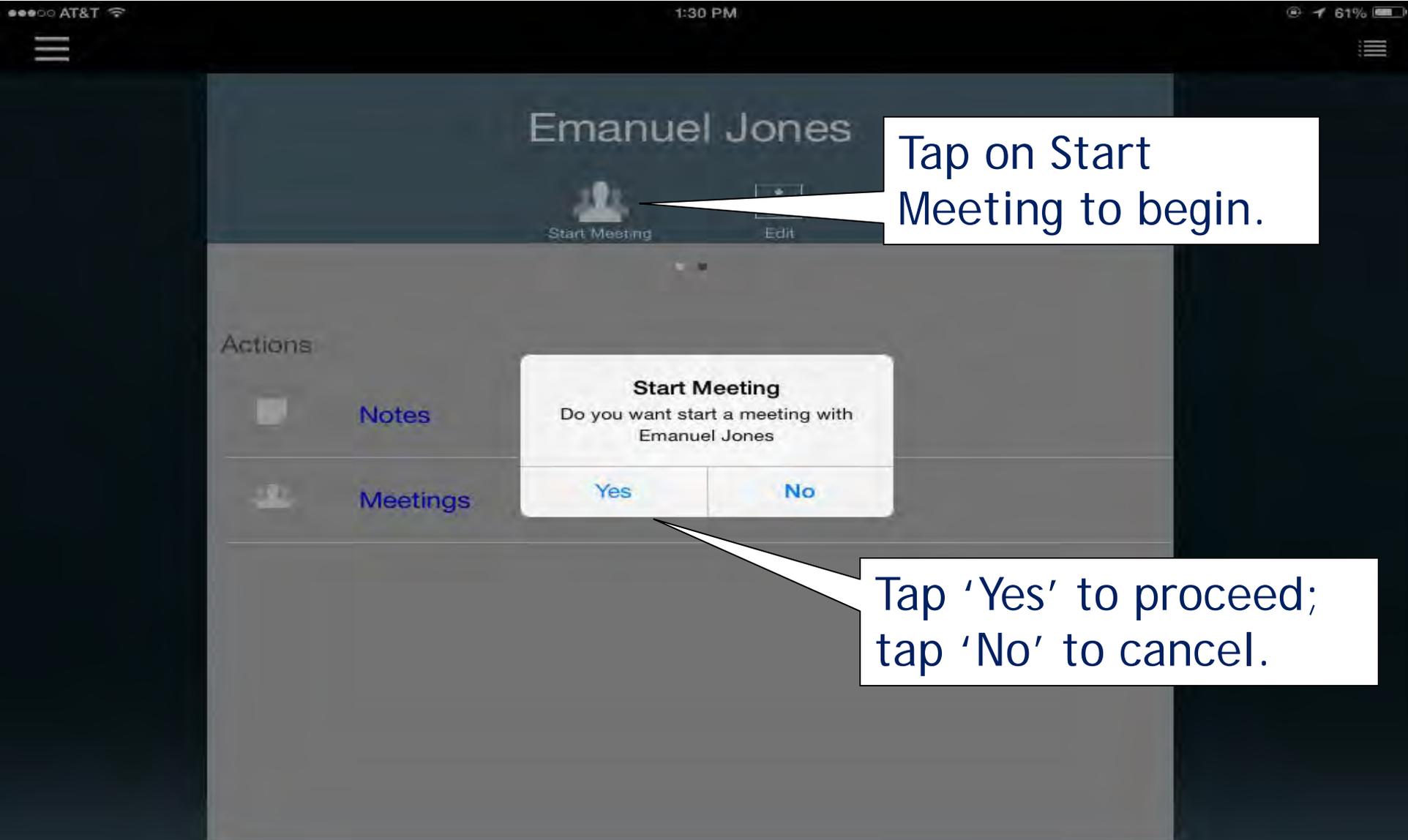
Return to Leads list here

Delete Lead:

- Swipe right to left and tap on 'Delete'
- To remove 'Delete' button, swipe opposite direction



# Starting a Meeting - Leads



# Starting Meetings - Messages



Verizon 3:08 PM 66%

Ascend patent pending PREV MESSAGES 1/3 NEXT AGENT M. Bentley

**From:** Todd Brooks  
**Published:** Jul 02, 2015  
**Expires:** Aug 01, 2015

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**PLEASE UPDATE YOUR ASCEND!**

Ascend was recently updated to improve the program's features and functions. If you experience any difficulty connecting to the

You can also start a meeting from the Messages screen. Tap the "Let's Get Started" button.

Happy sales!

Aetna Sales Team

ACKNOWLEDGED ✓ LET'S GET STARTED

# The Recording Disclaimer



Verizon 9:21 AM 100%



Inane Mccrea



## Recording Disclaimer

If not utilizing the recording functionality choose "Do Not Agree" and skip the review of this disclaimer. If using, please have the beneficiary read the following:

ENGLISH: To ensure quality and accuracy I would like to record our meeting together. You are not required to provide any health related information unless it will be used to determine enrollment eligibility. Do I have your permission to record and continue providing you with information?

ESPAÑOL: Para garantizar

Do Not Agree

Agree

Recording Disclaimer:  
•After securing agreement, tap "Agree" to start recording

Phone  
(812)961-2535

Address

Street Address

City

Monroe

State

47401

Status

Lead Status

Source

Lead Source



aetna®

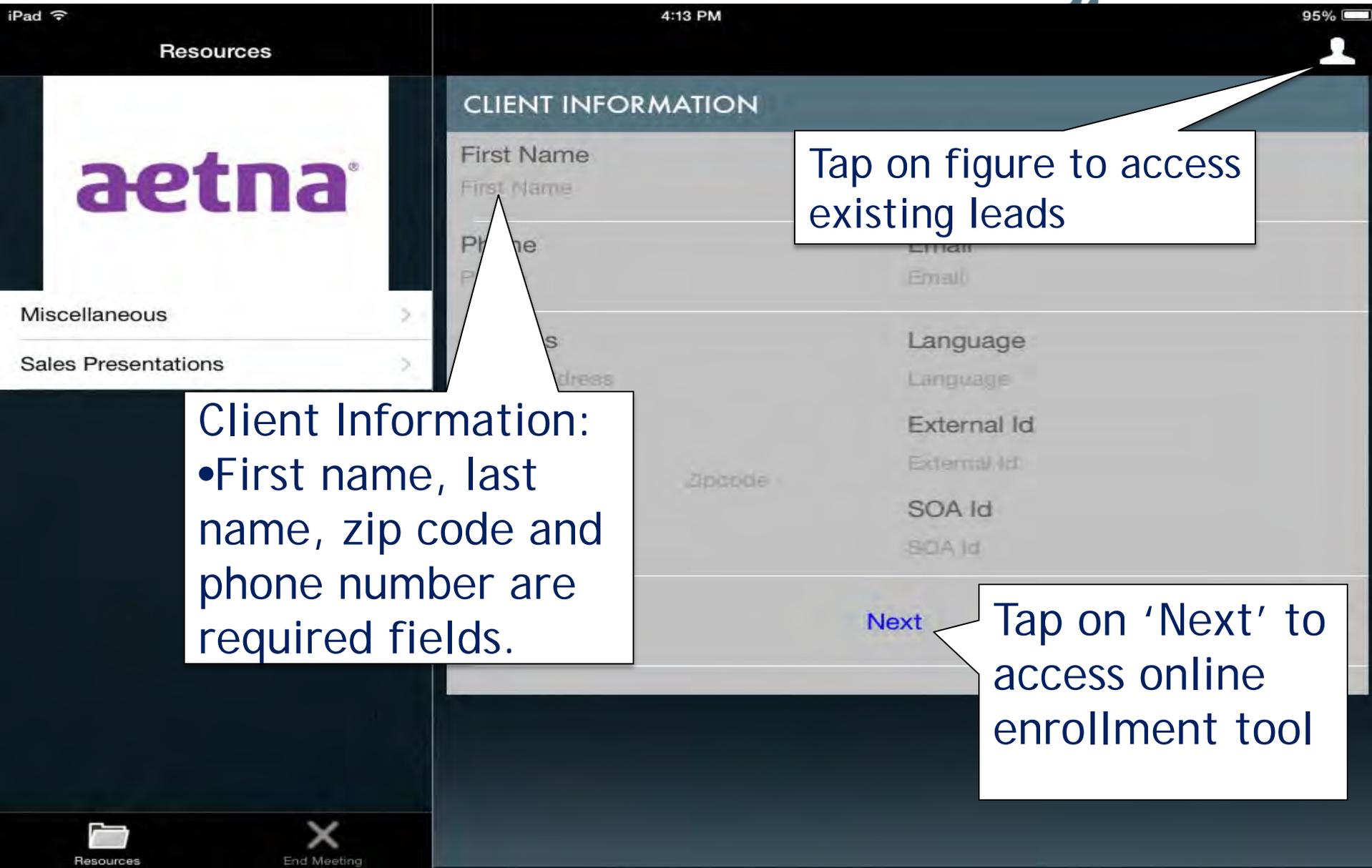


START MEETING



Tap here to Start your meeting

# Client Information Screen



Tap on figure to access existing leads

Client Information:  
•First name, last name, zip code and phone number are required fields.

Tap on 'Next' to access online enrollment tool

# The Quotes Engine



Resources

**aetna**

Miscellaneous

Sales Presentations

4:16 PM

Welcome, Richard Widen | [My Account](#) | [Sign Out](#)

SEARCH PROFILES & ENROLLMENTS | START A NEW CONSULTATION | ENROLL A NEW BENEFICIARY

PROFILE | HEALTH | DRUGS | COMPARE PLANS

**VIEW AND COMPARE PLANS**

Here are the plans available in the ZIP code entered. They are sorted in order of lowest estimated costs, to help you find the best value.

Medicare Advantage Prescription Drug Plans 0 plans | Prescription Drug Plans 4 plans | Medicare Advantage Plans 0 plans

COMPARE UP TO 3 PLANS | Sort By

Check to compare	Premium (Monthly Price)	Medicare Star Rating
<input type="checkbox"/>	<b>\$27.00</b>	★★★★☆
<input type="checkbox"/>	<b>\$42.20</b>	
<input type="checkbox"/>	<b>\$102.20</b>	

ENROLL | VIEW DETAILS

ENROLL | VIEW DETAILS

ENROLL | VIEW DETAILS

ENROLL | VIEW DETAILS

Resources | End Meeting

After tapping 'Next' the Profile Page appears. Navigate to:

- Compare plans
- Review results
- Refine search according to the prospect's wants/needs.

# The Enrollment Application



Resources

4:18 PM 94%

Welcome, Richard Widen | [My Account](#) | [Sign Out](#)

**aetna**

SEARCH PROFILES & ENROLLMENTS | START A NEW CONSULTATION | ENROLL A NEW BENEFICIARY

FIRST HEALTH PART D PREMIER PLUS (PDP)  
Monthly Premium:\$102.20  
Plan: S5768-189-000

Please wait while page is loading...

**PERSONAL INFORMATION**  
All information you provide is strictly confidential, secure and will be used for the sole purpose of enrolling you in your chosen plan.  
All lines marked with an asterisk \* are required.

**1. BENEFICIARY CONTACT INFORMATION**

Title  Mr.  Mrs.  Ms.

First Name \*

Middle Initial

Last Name \*

Date of Birth \*

Gender \*  Male  Female

Please enter your 10 digit phone number with no hyphen or space

Home Phone Number \*

Cell phone number

By giving us your email address, you agree to allow us to contact you regarding our health benefits plans, products, services and/or educational materials.

Email Address

**2. BENEFICIARY PERMANENT RESIDENCE (PO BOX IS NOT ALLOWED)**  
Please enter your permanent address below. If you have more than one home, enter your

Miscellaneous

Sales Presentations

Resources

End Meeting

**IMPORTANT INFORMATION**  
[Summary of Benefits Formulary](#)  
[Enrollment Form](#)  
[Multi-language Insert](#)  
[Evidence of Coverage](#)  
[Low Income Subsidy](#)  
[2015 Star Ratings](#)

**OTHER ENROLLMENT**

# Ending the Meeting



iPad 4:18 PM 94%

Resources

COVENTRY Health Care

Welcome, Richard Widen | [My Account](#) | [Sign Out](#)

[SEARCH PROFILES & ENROLLMENTS](#) [START A NEW CONSULTATION](#) [ENROLL A NEW BENEFICIARY](#)

**FIRST HEALTH PART D PREMIER PLUS (PDP)**  
Monthly Premium:\$102.20  
Plan: S5768-189-000

Please wait while page is loading...

**PERSONAL INFORMATION**  
All information you provide is strictly confidential, secure and will be used for the sole purpose of enrolling you in your chosen plan.  
All lines marked with an asterisk \* are required.

1. **BENEFICIARY CONTACT INFORMATION**

Title  Mr.  Mrs.  Ms.

First Name \*

Middle Initial

Last Name \*

Male  Female

Home Phone Number \*  Please enter your 10 digit phone number with no hyphen or spaces (e.g., 2125551212).

Cell phone number

By giving us your email address, you agree to allow us to contact you with information related to our health benefits plans, products, services and/or educational information related to health care.

Email Address

2. **BENEFICIARY PERMANENT RESIDENCE (PO BOX IS NOT ALLOWED)**  
Please enter your permanent address below. If you have more than one home, enter your

**IMPORTANT INFORMATION**  
[Summary of Benefits Formulary](#)  
[Enrollment Form](#)  
[Multi-language Insert](#)  
[Evidence of Coverage](#)  
[Low Income Subsidy](#)  
[2015 Star Ratings](#)

**OTHER ENROLLMENT METHODS**

**First Health Part D Premier Plus (PDP)**  
2222 Ewing Road  
Moon Township, PA 15108

**Phone:**  
[8553899688](tel:8553899688)

**TTY:**  
711

**Hours:**  
October 1 - February 14 / 8 a.m. to 8 p.m. / seven days a week;  
February 15 - September 30 / 8 a.m. to 5 p.m. / Monday thru Friday

**Online:**  
Medicare beneficiaries may enroll in First Health Part D Premier Plus (PDP) through the CMS Medicare Online Enrollment Center located at [www.Medicare.gov](http://www.Medicare.gov).

End Meeting icon

Resources End Meeting

# Meeting Dispositions



**End Meeting**

**aetna**

TEST

- Cancelled prior to meeting
- No show
- Rescheduled
- Application Submitted
- Not interested - shopping
- Not interested - premium
- Not interested - benefits
- Not interested - provider
- Not interested - formulary
- Not interested - other

**COVENTRY Health Care**

Welcome, Richard Widen | [My Account](#) | [Sign Out](#)

**SEARCH PROFILES & ENROLLMENT**

**FIRST HEALTH PART D PREMIER PLUS**  
Monthly Premium: \$102.20  
Plan: S5768-189-000

**PERSONAL INFORMATION**  
All information you provide is strictly confidential and is used for enrolling you in your chosen plan.

**1. BENEFICIARY CONTACT INFORMATION**

Title \_\_\_\_\_  
First Name \* \_\_\_\_\_  
Middle Initial \_\_\_\_\_  
Last \* \_\_\_\_\_  
Date of Birth \* \_\_\_\_\_  
Gender \*  Male  Female  
Please enter your 10 digit phone number with no hyphen or spaces (e.g., 2125551212).  
Home Phone Number \* \_\_\_\_\_ 1234567889  
Cell phone number \_\_\_\_\_

By giving us your email address, you agree to allow us to contact you with information related to our health benefits plans, products, services and/or educational information related to health care.

Email Address \_\_\_\_\_

**2. BENEFICIARY PERMANENT RESIDENCE (PO BOX IS NOT ALLOWED)**  
Please enter your permanent address below. If you have more than one home, enter your primary address. Items marked with a \* are required.  
Address (Line 1) \* \_\_\_\_\_

**Hours:**  
October 1 - February 14 / 8 a.m. to 8 p.m. / seven days a week;  
February 15 - September 30 / 8 a.m. to 5 p.m. / Monday thru Friday

**Online:**  
Medicare beneficiaries may enroll in First Health Part D Premier Plus (PDP) through the CMS Medicare Online Enrollment Center located at [www.medicare.gov](http://www.medicare.gov).

**Resources** **End Meeting**

A list of Dispositions will appear after clicking 'End Meeting' and you can select the appropriate category for your meeting.

# Special Dispositions



**End Meeting**

**aetna**

TEST

Cancelled prior to meeting

No show

Rescheduled

Application Submitted

Not interested - shopping

Not interested - premium

Not interested - benefits

Not interested - provider

Not interested - formulary

Not interested - other

4:19 PM 94%

Welcome, Richard Widen | [My Account](#) | [Sign Out](#)

**COVENTRY Health Care**

SEARCH PROFILES & ENROLLMENTS | START A NEW CONSULTATION | ENROLL A NEW BENEFICIARY

**FIRST HEALTH PART D PREMIER PLUS (PDP)**

Monthly Premium: \$102.20  
Plan: S5768-189-000

**PERSONAL INFORMATION**

All information you provide is strictly confidential, secure and will be used for the sole purpose of enrolling you in your chosen plan.

All lines marked with an asterisk \* are required.

**BENEFICIARY CONTACT INFORMATION**

Title  Mr.  Mrs.  Ms.

First Name +

Middle Initial

Last Name \*

Date of Birth \*

Gender \*

Please enter your 10 digit phone number with no hyphen or spaces (e.g., 2125551212).  
Home Phone Number \* 1234567889

Cell phone number

By giving us your email address, you agree to allow us to contact you with information related to our health benefits plans, products, services and/or educational information related to health care.

Email Address

**BENEFICIARY PERMANENT RESIDENCE (PO BOX IS NOT ALLOWED)**

Please enter your permanent address below. If you have more than one home, enter your primary address. Items marked with a \* are required.

Address (Line 1) \*

**IMPORTANT INFORMATION**

[Summary of Benefits](#)  
[Formulary](#)  
[Enrollment Form](#)  
[Multi-language Insert](#)  
[Evidence of Coverage](#)  
[Low Income Subsidy](#)  
[2015 Star Ratings](#)

**OTHER ENROLLMENT**

October 1 - February 14 / 8 a.m. to 8 p.m. / seven days a week;  
February 15 - September 30 / 8 a.m. to 5 p.m. / Monday thru Friday

**Online:**  
Medicare beneficiaries may enroll in First Health Part D Premier Plus (PDP) through the CMS Medicare Online Enrollment Center located at [www.medicare.gov](#).

Plus

Resources End Meeting

# Completing the Meeting



The screenshot shows an iPad app interface for 'End Meeting'. At the top, it says 'End Meeting' and '4:19 PM' with a 94% battery level. The background is a blurred view of a website for 'COVENTRY Health Care' with the 'aetna' logo. A confirmation dialog is overlaid in the center, asking 'End meeting in progress?' with 'Meeting Disposition: TEST' and 'Yes'/'No' buttons. On the left, a list of reasons for ending a meeting is visible, including 'TEST', 'Cancelled prior to meeting', 'No show', 'Rescheduled', 'Application Submitted', and several 'Not interested' options. A large text box at the bottom right explains the 'Yes' button's function.

**TEST**

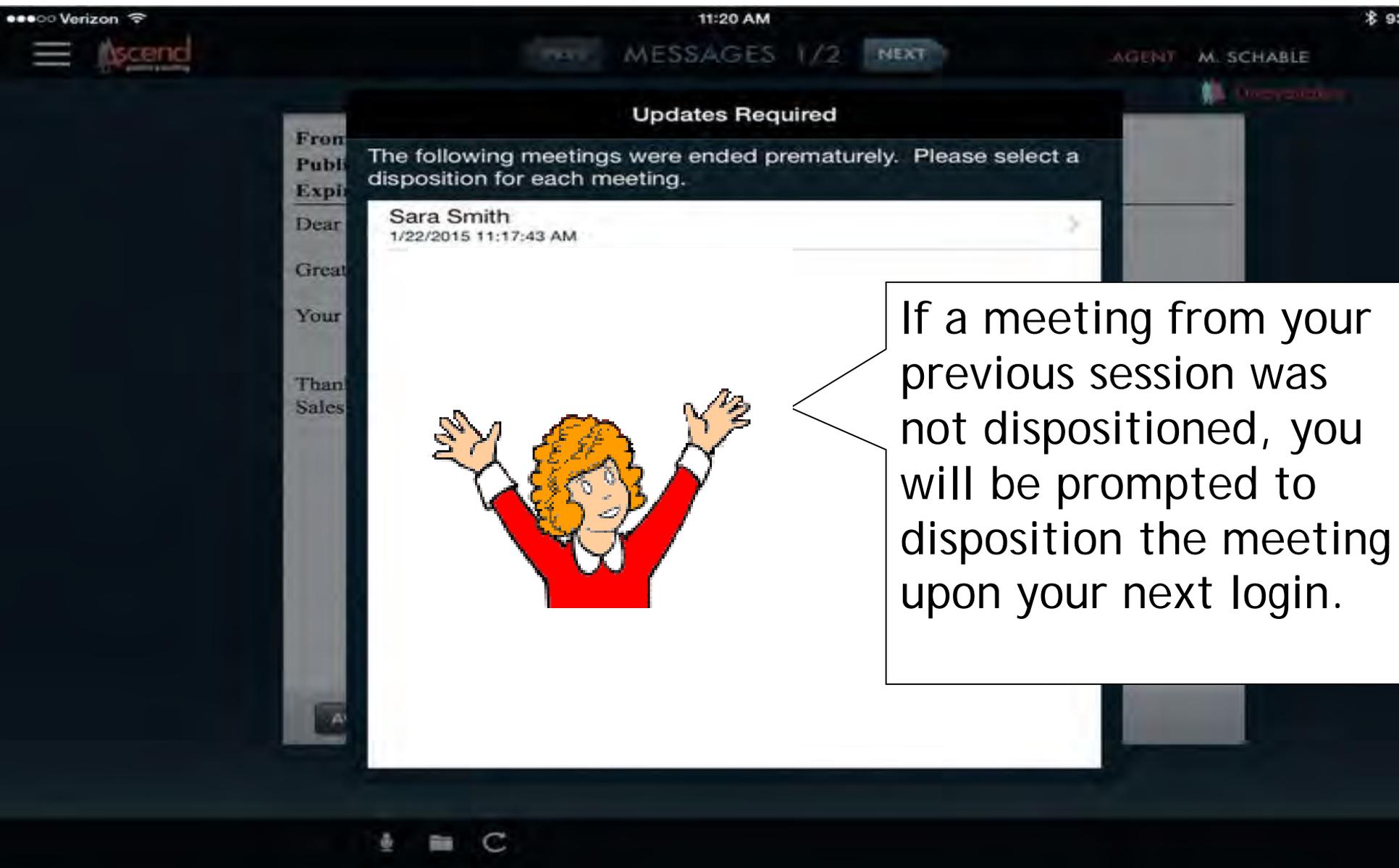
- Cancelled prior to meeting
- No show
- Rescheduled
- Application Submitted
- Not interested - shopping
- Not interested - premium
- Not interested - benefits
- Not interested - provider
- Not interested - formulary

**End meeting in progress?**  
Meeting Disposition: TEST

Yes No

**End Meeting Confirmation:**  
'Yes' ends meeting and recording if you are recording.

# Orphaned Meetings



## Updates Required

The following meetings were ended prematurely. Please select a disposition for each meeting.

Sara Smith  
1/22/2015 11:17:43 AM



If a meeting from your previous session was not dispositioned, you will be prompted to disposition the meeting upon your next login.

Updates Required Dispositions

Please choose a disposition for the meeting started 1/22/2015  
11:17:43 AM

- Test Meeting
- Cancelled prior to meeting
- No show
- Rescheduled
- Application Submitted
- Not interested - shopping
- Not interested - premium
- Not interested - benefits
- Not interested - provider
- Not interested - formulary
- Not interested - other
- Needs more time to think

Select the appropriate disposition.

From  
Publ  
Expit  
Dear  
Great  
Your  
Than  
Sales



# Uploading the Recordings



Verizon 11:06 AM 75%

ascend patent pending PREV MESSAGES 1/3 NEXT AGENT F. Papier

Unavailable

Close Recordings Upload

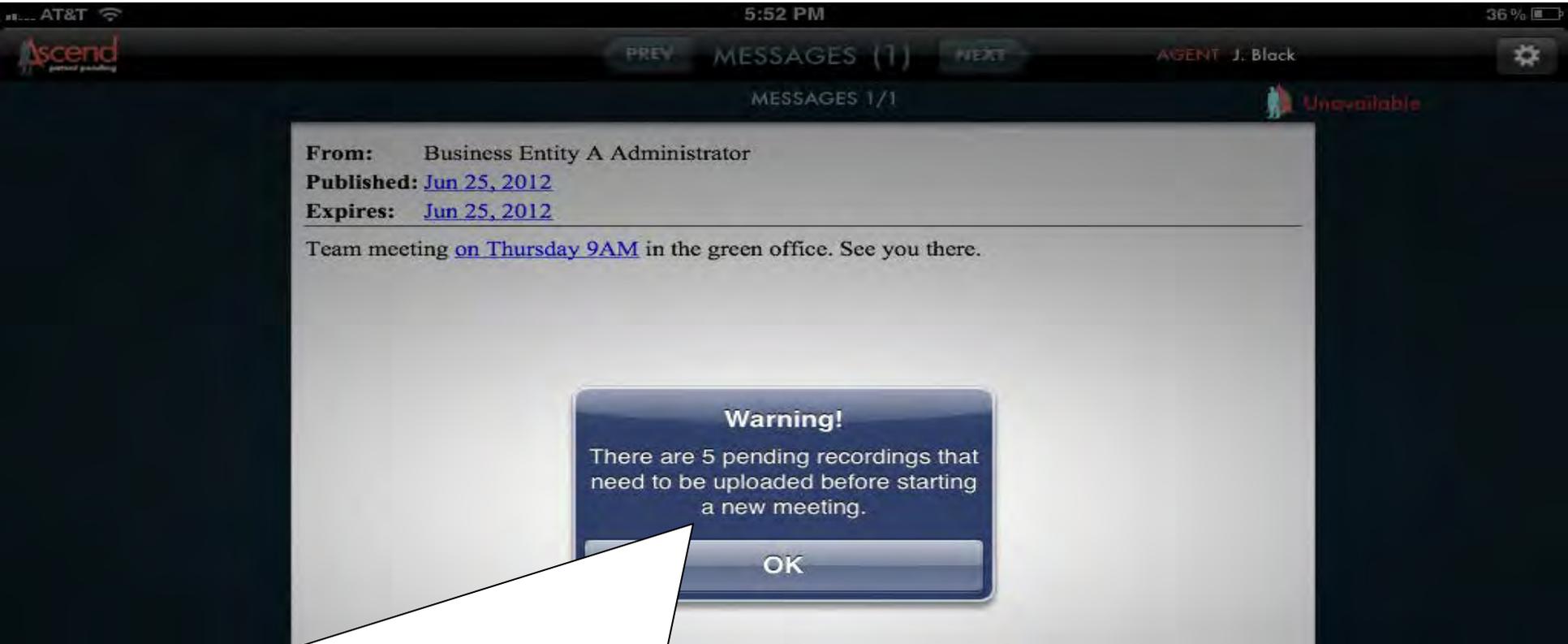
Mike Andike 6 MB  
Lansing, Ga  
Ready...  
07/08/2015 10:22 AM

From  
Publ  
Expi  
Brok  
Pleas  
Than

Al

Upload the Recording:

- Tap on "Upload" icon.
- Recording is uploaded.
- In-progress icon will display upload process.
- "Completed" tag will appear when upload complete.



## Upload Warning:

- Remember: to protect data, there is a limit set on the number of recordings you can store.
- Warning message indicates reaching limit (10).
- System cannot start new meeting until upload is complete.

# Signing Out of Ascend



A screenshot of the Ascend mobile application interface. The top status bar shows "Verizon", signal strength, Wi-Fi, time "9:18 AM", and battery "89%". The app header includes a hamburger menu icon, the Ascend logo, and navigation buttons for "PREV" and "NEXT" with "MESSAGES 3/3" in between. A left sidebar menu lists: Messages, Leads, Resources, Recordings, Settings (highlighted), Change Password, and Sign Out. A message card is displayed with the following text: "From: Matt Bentley", "Published: Apr 23, 2015", "Expires: Jan 01, 2016", and "WELCOME TRAINING ATTENDEES! This is a test message". A white callout box with a black border points to the "Sign Out" option in the sidebar, containing the text: "Sign out under the Ascend Menu. Tap the link once and you are done!". At the bottom of the message card, there is a grey bar with the text "ACKNOWLEDGED" and a green checkmark icon.



# Navigating the Ascend Virtual Sales Office: Leads & Starting a Meeting Windows Version

# Navigating Ascend - Leads



ASCEND AGENT: Felicia Papier

MESSAGES **LEADS** MEETING

Search

- Crystal Baker
- FELICIA PAPIER
- Mike Andike
- Rhonda Samples
- Tina Turner
- Wilma Flinstone

**Crystal Baker**

Meeting Edit Delete

**Phone**  
(812) 456-3876

**Address**  
123 Main St  
Bloomington  
Monroe  
IN 47403

**Status**  
Status

**Email**  
cba...@mail.com

**SOA Id**  
SOA Id

**Source**  
Self Generated

Clicking on Leads will bring you to your list

Edit a lead, delete a lead or start a meeting with the lead

# Navigating Ascend - Edit a Lead



ASCEND AGENT Felicia Papier

MESSAGES **LEADS** MEETING

Search

- Crystal Baker
- FELICIA PAPIER
- Mike Andike
- Rhonda Samples
- Tina Turner
- Wilma Flinstone

**Crystal Baker**

Phone: (812) 456-3876

Email: cbaker@email.com

Address: 123 Main St  
Bloomington  
Monroe

IN 47403

Language: Language

External Id: External Id

SOA Id: SOA Id

Status: Appointment set  
New  
Acknowledged  
Follow Up

Source

Amend the lead's status in the edit function

# Starting a Meeting from Messages



ASCEND

AGENT: Felicia Papier



MESSAGES LEADS MEETING

Click on  
'Meeting' to get  
to this Start  
Meeting screen.

The Aetna logo is displayed in a white rounded rectangle. It consists of the word "aetna" in a lowercase, purple, sans-serif font, followed by a registered trademark symbol (®).

aetna®

START MEETING

Click here to  
start a meeting.

# Client Information Screen



A5CEND AGENT: Derek Foreman

<b>First Name</b> First Name	<b>Last Name</b> Last Name
<b>Phone</b> ( ) - -	<b>Email</b> Email
<b>Address</b> Street Address	<b>External Id</b> External Id
City	<b>SOA Id</b> SOA Id
County	
State	Zip Code

**NEXT**

Enter prospect's information on this page.

# The Quote Engine



The screenshot shows a web application interface for 'ASCEND'. At the top, it displays 'AGENT: Derek Foreman'. The main content area lists three health plans from 'Flagpole Healthcare':

- Plan 1:** Balance + Rx Plan, \$52.36 mo. (HMO, \$5,000 deductible, 50% PCP copay, 50% hospital copay)
- Plan 2:** Balance + Rx Plan, \$64.12 mo. (HMO, \$3,000 deductible, 40% PCP copay, 40% hospital copay)
- Plan 3:** Choice + Rx Plan, \$64.12 mo. (HMO-PDS, \$2,500 deductible, 30% PCP copay, 30% hospital copay)

Each plan entry includes a 'compare' button, a 'SELECT' button, and a 'PLAN DETAILS' link. A sidebar on the left contains navigation controls (back, forward, close, refresh) and input fields for 'ZIP Code' (47401) and 'County'. A search filter is set to 'Low to High'.

This page will give you access to all Aetna/Coventry products and you will be able to do enrollments right from here.

These browser buttons enable you to go back, forward, leave or refresh the current web page you are on.

# Ending your Meeting & Dispositions



Click here to End Meeting and select a disposition.

AGENT: Derek Foreman

## End Meeting

Test Meeting

Cancelled prior to meeting

No show

Rescheduled

Application Submitted

Not interested - shopping

Not interested - premium

Not interested - benefits

Not interested - provider

### Classic + Rx Plan

PLAN TYPE: DEDUCTIBLE: PCP COI  
HMO \$5,000 50%

### Balance + Rx Plan

PLAN TYPE: DEDUCTIBLE: PCP COI  
HMO \$3,000 40%

### Choice + Rx Plan

PLAN TYPE: DEDUCTIBLE: PCP COI  
HMO-POS \$2,500 30%

# Completing your Meeting



Confirm that you have selected the correct disposition and click 'Yes' to End Meeting.

End meeting in progress?

Meeting Disposition: Test Meeting

yes

no

# Navigating Ascend - Signing Out



ASCEND

AGENT: carrier1 Administrator of FMO1

MESSAGES LEADS MEETING

Settings

Availability Password **Sign Out** Browser Settings

Messages

Administrator of FMO1

ASCEND TRA

**SIGN OUT**

Signing out will return you to the Sign In screen.  
Are you sure you want to sign out?

confirm

To exit the Ascend VSO program, Click on 'Settings', 'Sign Out' and 'confirm'



# Agent Ascend Real-Time Manager (ARM)

Access to Lead Management  
from a PC or iPad

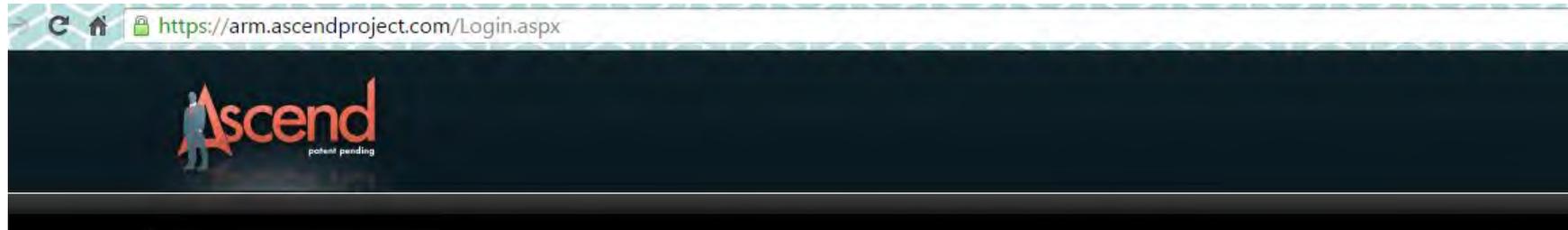


# Managing your Leads in ARM



- Ascend Real-Time Manager (ARM) is where you download your iPad app and Windows program and is also where you can easily manage all your leads.
- In ARM, you can add, delete, edit leads AND you can see ALL your Meetings that you have had with all your leads within one view.
- This lets you easily **TRACK YOUR SALES!**

# Accessing ARM



This browser is not supported. While certain features may work, some features will not.  
We currently fully support Internet Explorer 7, or later and Mozilla Firefox 4 or later.

Email:

Password:

**SIGN IN**

[Forgot Your Password?](#)

Visit [www.arm.ascendproject.com](http://www.arm.ascendproject.com) and log in.

[Help](#)

Bloom Insurance Agency, 1801 Liberty Drive, Bloomington, IN 47403

Version: 2015.3.07.05

# Navigating ARM – All Leads



2:25 PM  
arm.demo.ascendproject.com

**User: F. Papier (Agent)**  
**Entity:** Bloom Demo Business Entity  
[Log Out](#) [My Account](#) [Download App](#) [Help](#)

Meetings **Leads**

All Leads Add Lead

## Leads

Show deleted

First Name	Last Name	Status	Source	County	State	Agent	Date Created	Actions
FELICIA	PAPIER		Self Generated			Felicia Papier	2/5/2015	<a href="#">View</a> <a href="#">Delete</a>
Wilma	Flinstone		Self Generated	Limestone	Co	Felicia Papier	4/21/2015	<a href="#">View</a> <a href="#">Delete</a>
Mike	Andike		Self Generated	Monroe	Ga	Felicia Papier	4/21/2015	<a href="#">View</a> <a href="#">Delete</a>
Rhonda	Samples		Self Generated	Dunlap	In	Felicia Papier	4/21/2015	<a href="#">View</a> <a href="#">Delete</a>
Crystal	Baker		Self Generated	Monroe	IN	Felicia Papier	5/8/2015	<a href="#">View</a> <a href="#">Delete</a>
Tina	Turner		Self Generated	Morgan	Mi	Felicia Papier	5/28/2015	<a href="#">View</a> <a href="#">Delete</a>

View or Delete a Lead here

# My Account in ARM



User: B. Agent2 (Agent)

Entity: Aetna Medicare System

[Log out](#) [My Account](#) [Download App](#) [Help](#)

[Meetings](#)

[Leads](#)



## My Account

ⓘ Fields followed by ( \* ) are required.

### Account Info

ⓘ This information is shared across all BEs this account is part of.

Email \* BloomAgent2@bloommg.com

First Name \* Bloom

Last Name \* Agent2

Password

Current Password

New Password

Confirm New Password

#### Password Requirements

- At least 8 characters in length
- 1 upper-case character
- 1 lower-case character
- 1 numeric character

## User BE Specific Info

**i** This information is specific to BE - **Aetna Medicare System**. To change the Business Entity please select it on the dropdown at the top of the page.

### Phone Numbers

Primary Phone \* 828-181-2812

Home Phone

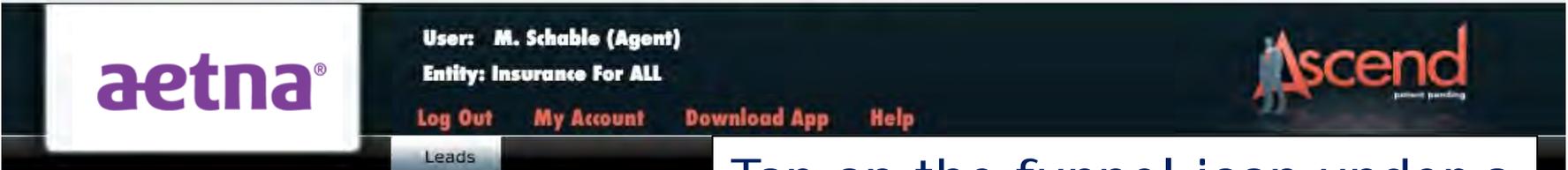
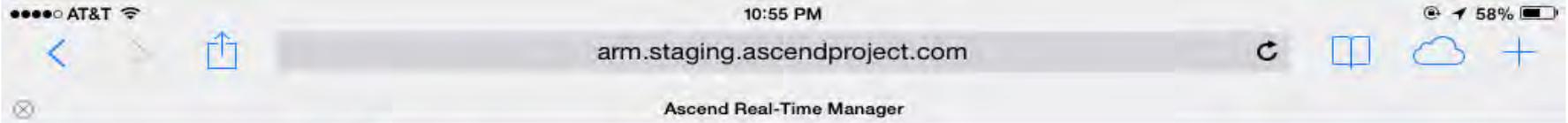
Fax

Mobile Phone

Office Phone

**Save Changes**

# Filtering Leads



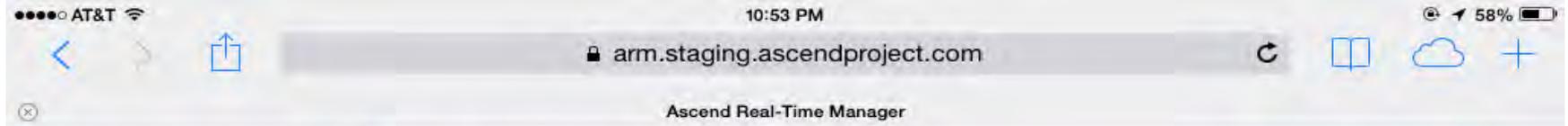
Tap on the funnel icon under a column; select a filtering option to find leads quickly

<input type="checkbox"/>	First Name	Last Name	Status	Source	County	State	Agent	Date Created	View	Delete
<input type="checkbox"/>	Norah		Self Generated			MA	Meredith Schable	7/1/2014	<a href="#">View</a>	<a href="#">Delete</a>
<input type="checkbox"/>	Tina		Self Generated				Meredith Schable	7/1/2014	<a href="#">View</a>	<a href="#">Delete</a>
<input type="checkbox"/>	Michael		Self Generated				Meredith Schable	7/1/2014	<a href="#">View</a>	<a href="#">Delete</a>
<input type="checkbox"/>	Shania		Self Generated				Meredith Schable	7/1/2014	<a href="#">View</a>	<a href="#">Delete</a>
<input type="checkbox"/>	Tim	McGraw	Self Generated				Meredith Schable	7/1/2014	<a href="#">View</a>	<a href="#">Delete</a>
<input type="checkbox"/>	Sara	Barailles	Self Generated				Meredith Schable	7/1/2014	<a href="#">View</a>	<a href="#">Delete</a>

Filter Leads by Name, Status, Source, County, State, Agent or Date Created

<input type="checkbox"/>	Carla	Bruni							<a href="#">View</a>	<a href="#">Delete</a>
<input type="checkbox"/>	Frank	Sinatra							<a href="#">View</a>	<a href="#">Delete</a>
<input type="checkbox"/>	Hunter	Hayes							<a href="#">View</a>	<a href="#">Delete</a>
<input type="checkbox"/>	Jim	Brickman							<a href="#">View</a>	<a href="#">Delete</a>
<input type="checkbox"/>	John	Legend	Self Generated				Meredith Schable	7/1/2014	<a href="#">View</a>	<a href="#">Delete</a>

# Adding a Lead



Ascend Real-Time Manager



User: M. Schable (Agent)  
Entity: Insurance For All

[Log Out](#) [My Account](#) [Download App](#) [Help](#)



Leads

All Leads Add Lead

## Add a Lead

Fields followed by ( \* ) are required.

Add Lead

### Lead Information

First Name: \*

Last Name: \*

Address:

State:

County:

Email:

Add new prospect info,  
Tap 'Add Lead' to save

### Lead Details

External ID:

SOA ID:

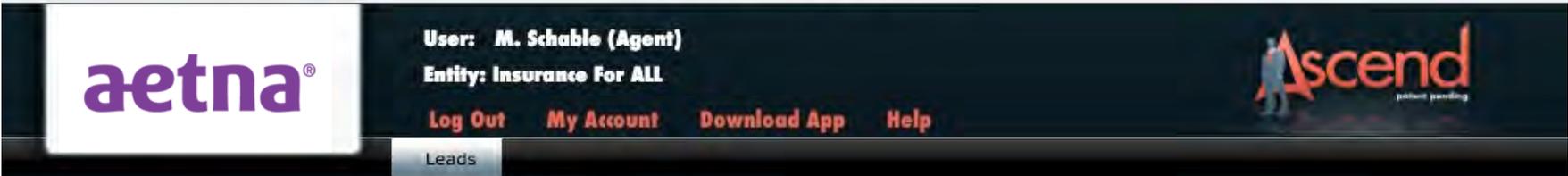
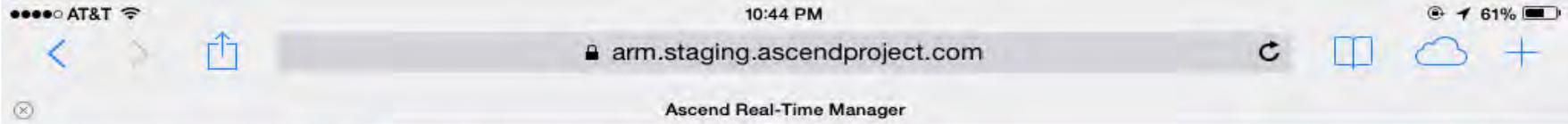
Lead Status:

Lead Source: Self Generated

Assigned Agent:

Meredith Schable

# Amending an Existing Lead



Select an action from the drop down menu

Tap 'Apply Changes' to save

Add a Lead Status here

Scroll down to view Notes & Meeting History

**Edit Lead**

Fields followed by ( \* ) are required.

**Lead Information**

First Name: *	Norah	Last Name: *	Jones
Address:	432 N Canterbury Ln	City:	Boston
State:	Massachusetts		
County:			
Email:			

**Lead Details**

External ID:		Lead Status:	
Assigned Agent:	Meredith Schable		

**Notes**

# Show Deleted Leads



Check the box to view deleted Leads

Click 'Undelete' to reactivate a Lead

Deleted leads are grayed out

AT&T 10:11 PM 61%

arm.s

All Leads Add Lead

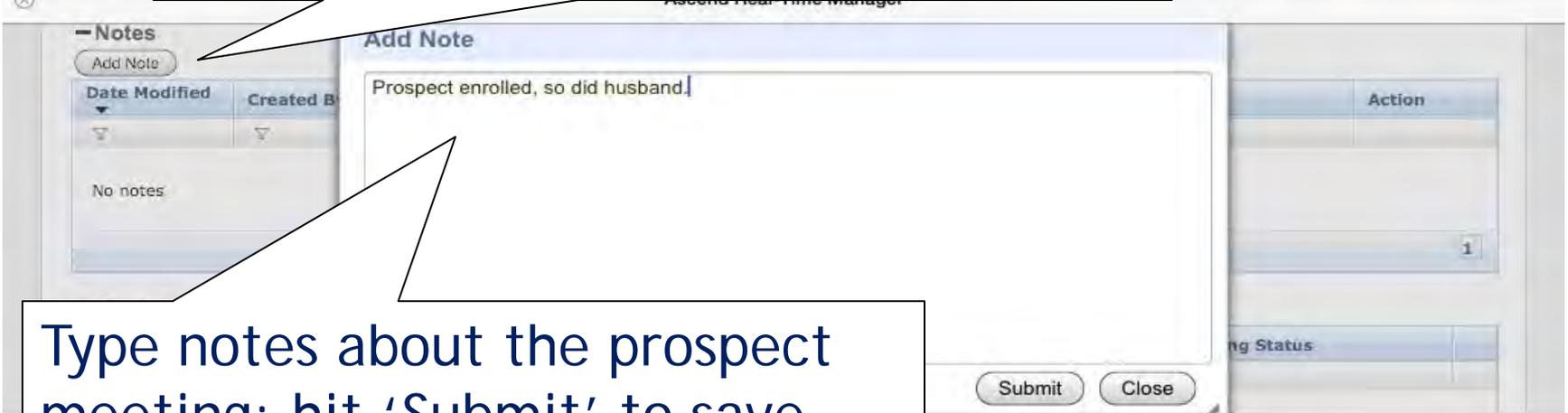
## Leads

Delete

Show deleted leads

<input type="checkbox"/>	First Name	Last Name	Status	Source	County	State	Agent	Date Created	Actions
<input type="checkbox"/>	Pamela	Miller						7/2014	<a href="#">View</a> <a href="#">UnDelete</a> Deleted
<input type="checkbox"/>	Norah	Jones						/2014	<a href="#">View</a> <a href="#">Delete</a>
<input type="checkbox"/>	Dave	Matthews						/2014	<a href="#">View</a> <a href="#">UnDelete</a> Deleted
<input type="checkbox"/>	Miranda	Lambert		Self Generated			Schable	7/1/2014	<a href="#">View</a> <a href="#">UnDelete</a> Deleted
<input type="checkbox"/>	Tina	Turner		Self Generated			Meredith Schable	7/1/2014	<a href="#">View</a> <a href="#">Delete</a>
<input type="checkbox"/>	Michael	Jackson		Self Generated			Meredith Schable	7/1/2014	<a href="#">View</a> <a href="#">Delete</a>
<input type="checkbox"/>	Dolly	Parton		Self Generated			Meredith Schable	7/1/2014	<a href="#">View</a> <a href="#">UnDelete</a> Deleted
<input type="checkbox"/>	Shania	Twain		Self Generated			Meredith Schable	7/1/2014	<a href="#">View</a> <a href="#">Delete</a>
<input type="checkbox"/>	Tim	McGraw		Self Generated			Meredith Schable	7/1/2014	<a href="#">View</a> <a href="#">Delete</a>
<input type="checkbox"/>	Faith	Hill		Self Generated			Meredith Schable	7/1/2014	<a href="#">View</a> <a href="#">UnDelete</a> Deleted
<input type="checkbox"/>	Sara	Barailles		Self Generated			Meredith Schable	7/1/2014	<a href="#">View</a> <a href="#">Delete</a>
<input type="checkbox"/>	Alicia	Keys		Self Generated			Meredith Schable	7/1/2014	<a href="#">View</a> <a href="#">Delete</a>
<input type="checkbox"/>	Carla	Bruni		Self Generated			Meredith Schable	7/1/2014	<a href="#">View</a> <a href="#">Delete</a>
<input type="checkbox"/>	Frank	Sinatra		Self Generated			Meredith Schable	7/1/2014	<a href="#">View</a> <a href="#">Delete</a>

# Adding a Note



# Review Notes & Meeting History



View Lead info, Notes and Meeting History all in one location

## Lead Information

First Name: *	Norah	Last Name: *	James
Address:	432 N Canterbury Ln	City:	Boston
State:	MA	Zip Code:	15487
County:		Phone Number:	734-241-9338
Email:			

## Lead Details

External ID:		SOA ID:	
Lead Status:		Lead Source:	Self Generated
Assigned Agent:	Meredith Schable		

## Notes

Add Note

Date Modified	Created By	Text	Action
07/01/2014 10:46 PM	Meredith Schable	Prospect enrolled, so did husband.	<a href="#">Edit</a> <a href="#">Delete</a>

Edit or Delete Notes

## Meeting History

Start Time	Agent	SOAID	Disposition	City	State	Zip Code	Recording Status
07/01/2014 10:50 PM	Meredith Schable		Application Submitted	Bloomington	IN	47401	Meeting not recorded



**IN CONCLUSION...**

# Agent Success with Ascend



“When I get home there’s no faxing apps so client is enrolled faster I *get paid faster.*”

“So much faster, more secure and *gives me peace of mind* that Aetna receives app immediately.”

“Makes me more efficient and *streamlines the process* during busy AEP.”

“So much *easier* & convenient. I love not lugging all that paper around anymore!”

“Allows me to fit *more appointments* in one day.”



# Practice to Perfect

- Practice integrating this great new application into your usual sales process.
- Practice opening Resources you need at the right time in your presentation, like videos or documents.
- Practice making these visible to your prospect.
- Practice the flow of your presentation and using tools like emailing a document to prospect.

# Tips for Success



Create good habits:

- Log in to Ascend at beginning of the day to check for messages and updates.
- Check to see if your meetings are uploaded before you go to next meeting.
- Upload recordings as regularly as possible.
- Keep your devices charged and ready for meetings.
- Check your connectivity before you begin meetings with your prospect.

# Important Contact Info



- **To request an Ascend VSO license:**

Go to <http://broker.cvty.com> when you've become ready-to-sell and select Ascend User Request from the main menu after signing in.

- **If you need Technical Assistance:**

- Call the Ascend Help Desk at **866-338-7772**

- Monday – Friday, 8am–5pm EST

- During AEP 8am-8pm EST, 7 days

- Or email **help@ascendproject.com**