



Ascend Virtual Sales Office: Tips and Tricks 2016

To retrieve the enrollment form, post-submission, at a later date:

- Start another meeting in Ascend.
 - When you're taken to the Compare Plans page, select "Search Profiles" from the top left of the four main tabs.
 - You're given fields to search by. Enter something identifiable for that person (i.e, last name, etc.). The more info, the narrower the results. But be careful, more info also gives you more chances to mis-type and get back zero results.
 - This is the only way to retrieve the completed enrollment form post-submission.
 - These remain available for 10 years.

To get a PDF of the application immediately after it's submitted:

- (On a laptop) After submitting the enrollment and receiving a confirmation number, choose "Print Application" from the upper right of the confirmation screen.
 - Selecting Print will actually create a PDF of the entire application, even if you're not connected to a printer.
 - Once the PDF is created, you can **print/save/email**.
 - **IF YOU RECEIVE A BLANK PAGE WHEN SELECTING "PRINT Application"**
 - Be sure to scroll through the pages and verify all pages are blank.
 - If confirmed, select the SETTINGS icon (sprocket) in the upper right.
 - THEN, select BROWSER SETTINGS.
 - THEN, turn Default Browser to ON.
- (On an iPad) After submitting the enrollment and receiving a confirmation number, choose "Print Application" from the upper right of the confirmation screen.
 - Selecting Print will actually create a PDF of the entire application, even if you're not connected to a printer.
 - Hold down the Sleep/Wake button on the upper right corner of your iPad while quickly pressing the home button on the lower front/center (do not hold down the home button too long, this will cause a rest of your iPad to begin). If your volume is on you'll hear the camera's shutter sound and that will confirm you've taken the picture.
 - Caution, you may have to take two pictures to capture the entire enrollment form.
 - When you take a screen shot on your iPad it saves each shot as a *photo* to the photo album within your iPad. You even have the ability to create an album within the album. For example, I have my iPad set-up so that if I take a picture of an enrollment form, the screen shot saves to an "Enrollments" photo album inside my iPad's photos section.

Coventry/Aetna PAPER SOA procedure for electronic (Ascend) enrollments is as follows:

- Collect the Scope Of Appointment per CMS guidance.
- Retain the SOA for the CMS-required 10 years.
- Do NOT submit the SOA separately from the Ascend enrollment.
- Coventry/Aetna is required to audit our SOAs. We randomly select Ascend enrollments with missing SOAs.
- We then email the broker for a copy of the missing SOA.
- The broker is given 72 hours (and complete instructions on how to complete the task) to get the copy and send it to us.
- Continue sending the SOA with all paper enrollment submissions.



Coventry/Aetna *Telephonic* SOA procedure for electronic (Ascend) enrollments is as follows:

- Once you have completed the telephonic scope of appointment process and received your SOA ID#, enter that number into the opening "Start Meeting" screen within Ascend.
- The SOA ID# will automatically carry over to the SOA field found within the enrollment form