



ASCEND USER TRAINING FOR CENTENE & WELLCARE

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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 **175,000 agents** including national, regional and local carriers
- Available for **iOS, Windows, and Android** 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 submitted 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

Ascend will also...



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

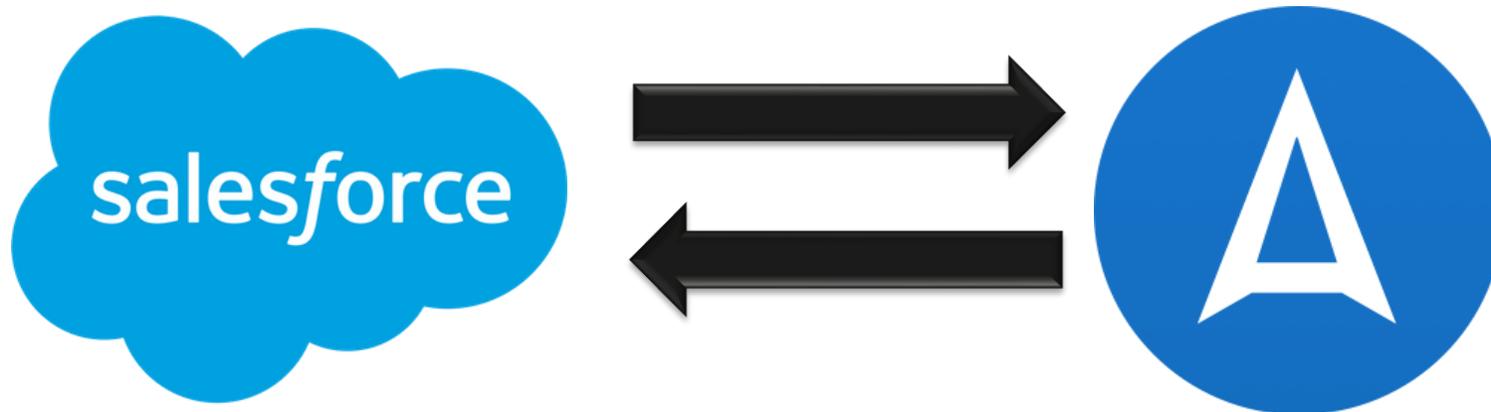


ASCEND & SALESFORCE

Salesforce Integration



- Salesforce and Ascend communicate to send updates back and forth





GETTING FAMILIAR WITH ASCEND



The Three Components of Ascend

ARM: Ascend Real-Time Manager



AMA: Ascend Mobile Application

AQE: Ascend Quote & Enrollment

ARM: Ascend Real-Time Manager



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

Ascend

Agent Connect Ascend Meetings Map

Email

Password

[Forgot Password?](#)

AMA: Ascend Mobile Application



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



AQE: Ascend Quote & Enrollment



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

2023 Medicare Plans

Below are the plans that are available in ZIP Code **90015** in Los Angeles County, California:
Let's start your enrollment.

ZIP Code:

[Update](#)

Filter By

[Max Monthly Premium](#) ▾

[Max Out-of-Pocket](#) ▾

[Plan Type](#) ▾

[Benefits](#) ▾

[Clear All Filters](#)

Medicare Advantage

Prescription Drug Plan

Select for Comparison

Wellcare Dual Align 001 (HMO D-SNP)

\$ **0**⁰⁰ /month

Contract ID H5087-001

Plan Covers

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

In-Network Copay

- Primary Care Provider:** \$0
- Emergency Room:** \$0
- Specialist:** \$0
- Maximum Out-of-Pocket:** \$8,300 In-Network.



[Apply Now](#)

[View Details](#)



ASCEND REAL-TIME MANAGER

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



https://arm.ascendproject.com/



Open your browser and enter this URL.

Agent Connect

Ascend Meetings Map

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

Email

Password

Forgot Password?

Forgot your password? Tap here to get new one.

Login

Then click here to sign in.

Downloading AMA



Entity: Centene Corporate

M. Bettegnies (Agent)

Download

Meetings

Leads

Download

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.



Ascend iOS

INSTALL APP

Version 2020.1.02.19
Released: 3/31/2020

Tap here to install on an iPad.



Ascend Windows

INSTALL APP

Version 2020.2.05.01
Released: 5/6/2020

Click here to install on a Windows device.



Mobile Application User Manual

VIEW



IOS ONLY INSTRUCTIONS

1. Launch the Ascend App



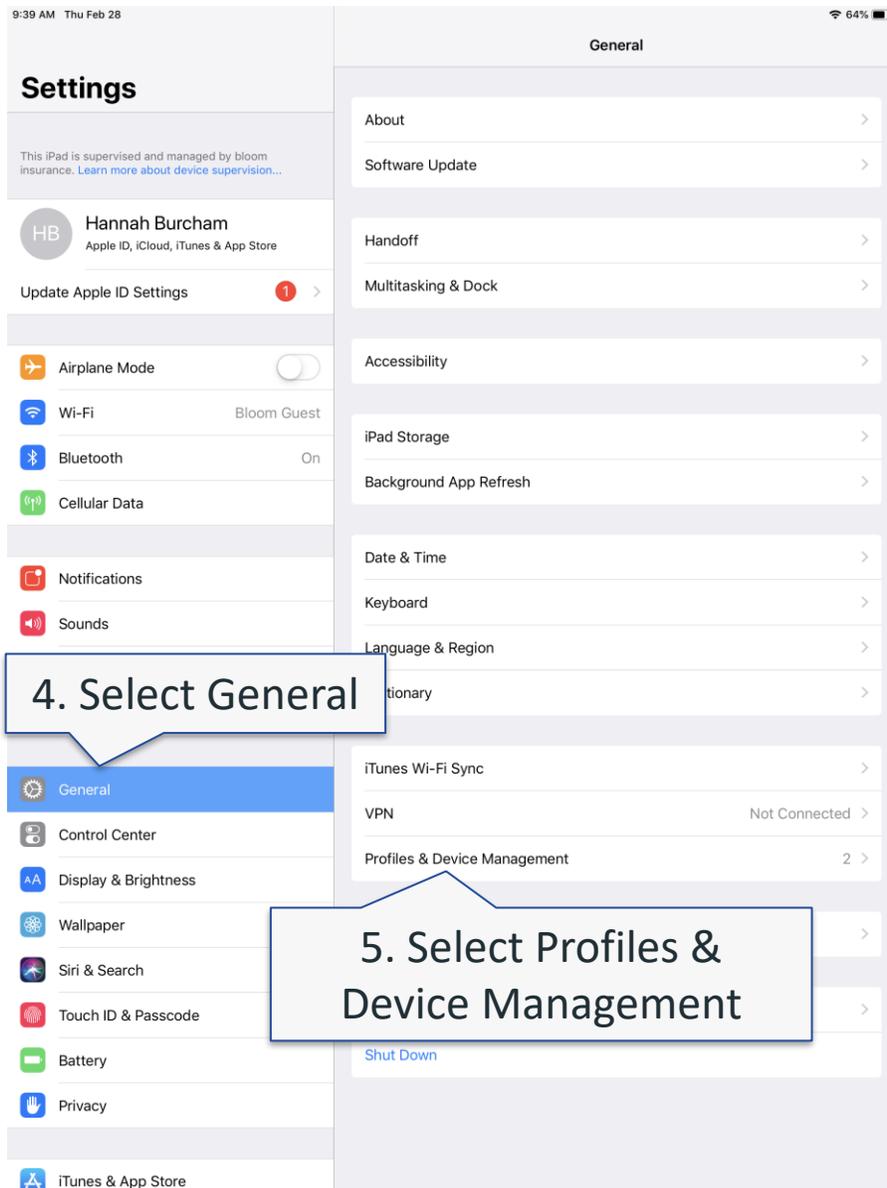
Untrusted Enterprise Developer

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

Cancel

2. Click Cancel

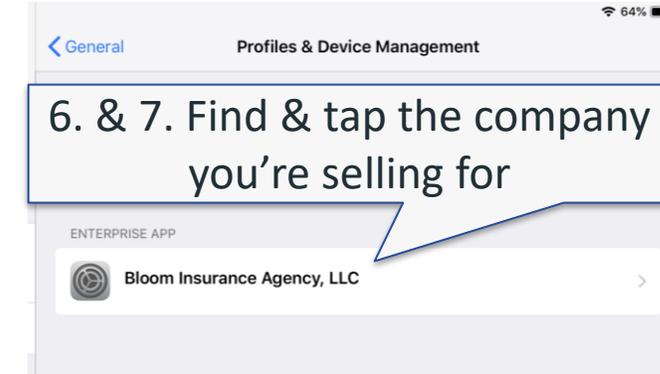
3. Open Settings



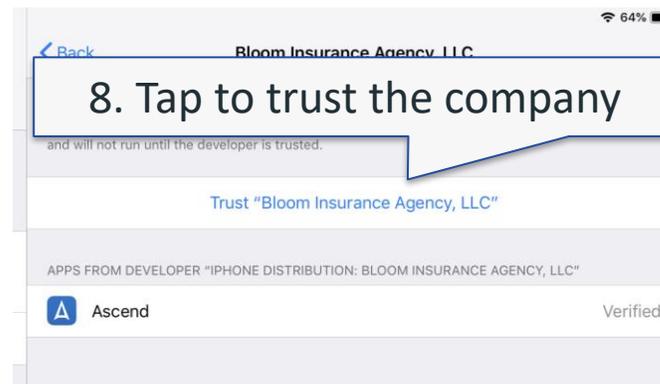
4. Select General

5. Select Profiles & Device Management

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



8. Tap to trust the company



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

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

Cancel

Trust

9. Verify that you trust them



10. Launch the Ascend App and start using AMA



ASCEND MOBILE APPLICATION



LOGIN & NAVIGATION

Login Screen



The screenshot shows the Ascend login interface. At the top center is the Ascend logo (a white 'A' in a blue circle) with the word "Ascend" below it. Below the logo are two input fields: "Email" and "Password". A blue "Sign In" button is positioned below the password field. Underneath the button are three toggle switches: "Remember Email", "Use Touch ID", and "Sandbox Mode". Below the toggles are two links: "Forgot Password?" and "Help". At the bottom of the screen, the text "Version: 2020.103.02" is displayed. Six callout boxes with blue borders and white text point to specific elements: "Manual Sign In" points to the top left; "Touch ID Sign In" points to the "Use Touch ID" toggle; "Tap here to contact the Helpdesk" points to the "Help" link; "Version Information" points to the version number; "Tap here to get a new Password" points to the "Forgot Password?" link; and "Tap here to enter Sandbox (test) mode" points to the "Sandbox Mode" toggle.

Home Screen



Your name should appear here

Madison Bettegnies
Unavailable Accepting Calls

And here

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

Welcome Madison

What would you like to do today?

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

New Leads

Name	Date Modified	Source	Status	County	Zip Code
------	---------------	--------	--------	--------	----------

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

[View All Leads](#)

Upcoming Appointments

Main Window



Welcome Madison

What would you like to do today?

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

New Leads

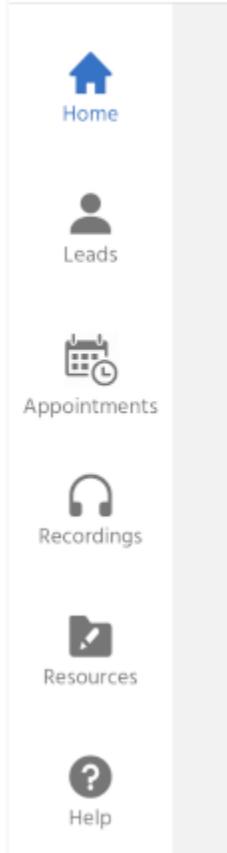
Name	Date Modified	Source	Status	County	Zip Code
You have no new leads. Any new leads will appear here.					

[View All Leads](#)

Upcoming Appointments

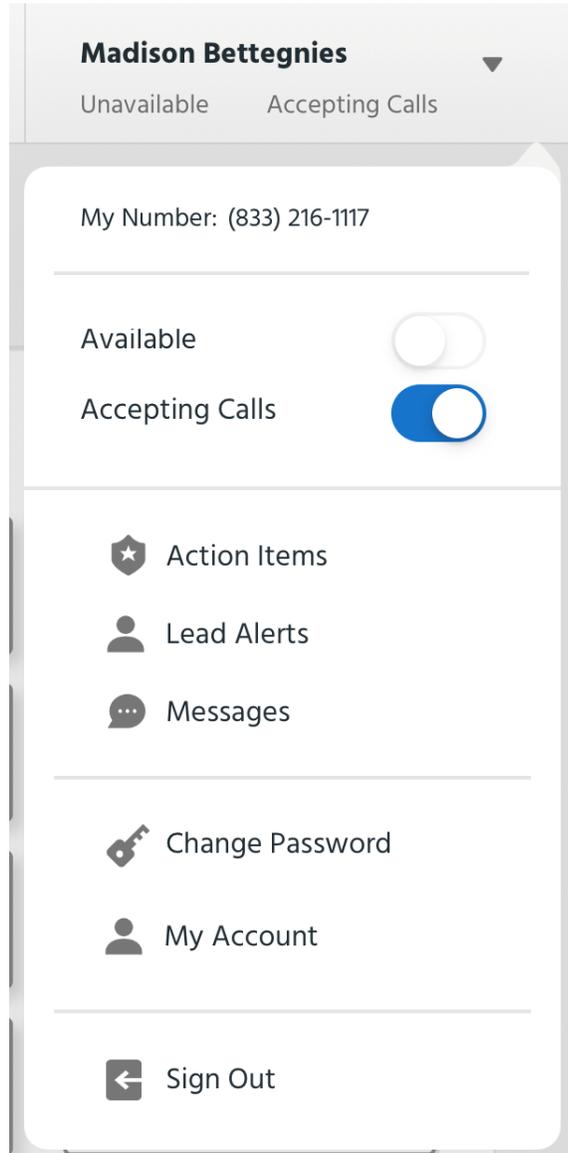
- This makes up the majority of the AMA screen and is what will change when different options are selected from the **Navigation Bar** or **Drop-Down Menu**

Navigation Bar



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

Drop-down Menu for iPad



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

Drop-down Menu for Windows



Madison Bettegnies
Unavailable Not Accepting Calls ▲

My Number: +18334070016

Available No

Accepting Calls No

Default Browser No

Connection Status: Connected

Offline Mode No

★ Action Items

👤 Lead Alerts 1

💬 Messages

🔑 Change Password

👤 My Account

🔙 Sign Out

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

My Account



- Edit personal account information easily on AMA

The screenshot displays the Ascend user interface. At the top right, the user's name 'Madison Bettegnies' is shown with a dropdown menu containing 'Unavailable' and 'Accepting Calls'. The main content area is titled 'Welcome Madison'. A central modal window titled 'My Account: maddybett@hotmail.com' is open, containing the following fields:

- First Name:
- Last Name:
- Phone:
- Mobile:
- Office:
- Home:
- Fax:
- Address:
- City:
- State:
- ZIP Code:

At the bottom of the modal are 'Save' and 'Cancel' buttons. The background interface includes a sidebar with icons for Home, Leads, Appointments, Recordings, Resources, and Help. On the right, there are buttons for 'Agent Portal - CA', 'Agent Portal - KS', 'Agent Portal - OH', and 'Agent Portal - WI'. Below the modal, a 'New Leads' table is visible with columns for Name, Date Modified, Source, Status, County, and Zip Code. A message at the bottom of the table reads: 'You have no new leads. Any new leads will appear here.'



HOME



Home Screen



Ascend

Madison Bettegnes ¹
Unavailable Accepting Calls

Welcome Madison

New Action Items! ✕
[View Notifications](#)

+ You have a new lead assigned to you! ✕

📅 You have a new Home Visit assigned to you! ✕

1/36 Downloading... 0%

What would you like to do today?

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

Notifications

Resource Quick Links

New Action Item



A number here shows how many action items you must view

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

Ascend

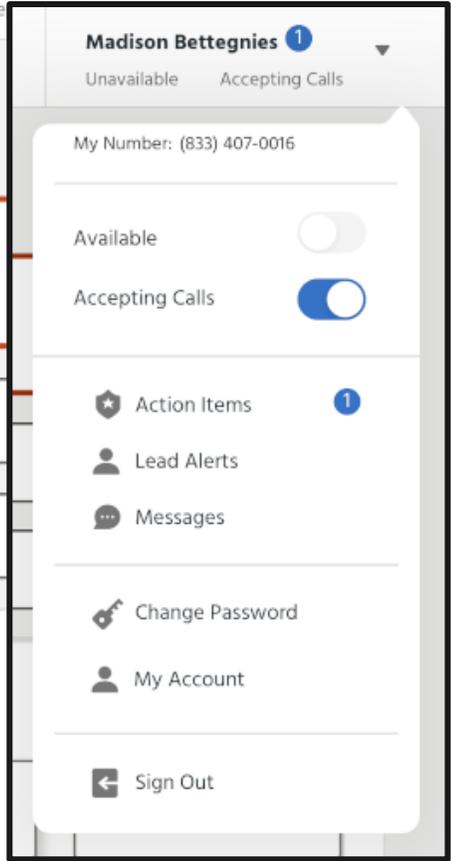
Welcome Madison

 **New Action Items!**
[View Notifications](#)

Click here to view the notification

You can also view action items from the dropdown list

Madison Bettegnies **1**
Unavailable Accepting Calls



Madison Bettegnies **1**
Unavailable Accepting Calls

My Number: (833) 407-0016

Available

Accepting Calls

 Action Items **1**

 Lead Alerts

 Messages

 Change Password

 My Account

 Sign Out

 Appointments

 Recordings

Acknowledging the Message



Click anywhere on the message to open it

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

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

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



LEADS



Leads Screen



Madison Bettegnies
Unavailable Accepting Calls

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

Leads

New Leads

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

All Leads [Filter Leads](#) [Add a Lead](#)

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

D
J
T

Add a Lead



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

Ascend

Leads

New Leads

Name
Doe, Jane

All Leads

Search: []

Doe, Jane
Jo, Harper
test, crosby
test, harper
Test, Sam
Test, John
Test, Test
Test, Harper

New Lead [Scan Drivers License](#)

First Name [First Name] **Last Name** [Last Name]

Birthday [Select] Day [] Year []

Gender [Male] [Female]

Phone [(###) ###-####]

Email [Email]

Permission to Contact [Select]

Status [Select] **Source** [Self Generated]

Address [Address Line 1]

City & County [City] [County]

State & Zip [Select] [Zip Code]

[Add a Lead]

Test, John	Sep 19, 2019	Self Generated	-	47403
Test, Test	Nov 13, 2019	Self Generated	-	75390
Test, Harper	Apr 27, 2020	Self Generated	-	47403

Scan License to Collect Lead Info



Finish Collecting Lead Info



The screenshot shows a mobile application form for adding a new lead. The form includes the following fields and controls:

- Email:** A text input field with the placeholder "Email".
- Permission to Contact:** A dropdown menu with "Select" as the current selection.
- Status:** A dropdown menu with "Select" as the current selection.
- Source:** A dropdown menu with "Self Generated" as the current selection.
- Address:** A text input field with the placeholder "Address Line 1".
- City & County:** Two text input fields, "City" and "County".
- State & Zip:** A dropdown menu for "State" with "Select" as the current selection, and a text input field for "Zip Code".
- Claim Number:** A text input field with the placeholder "Claim #". To its right is a camera icon.
- Hospital Coverage:** A text input field with the placeholder "MM/DD/YYYY".
- Medical Coverage:** A text input field with the placeholder "MM/DD/YYYY".
- Buttons:** A blue "Save" button and a grey "Cancel" button.

Two callout boxes provide instructions:

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

Lead Info



Madison Bettegnies
Unavailable Accepting Calls



Doe, Jane

May 26, 2020

Click here to edit a lead

Click here to contact a lead

Contact Lead

Start a Meeting

Or click here to start a meeting

Appointments

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

Create a Scope of Appointment

Create Home Visit

Click here to create a Scope of Appointment or Home Visit

Past meetings held will be viewable here

Past Meetings

Date	Time	Held By	Status
------	------	---------	--------

No Meetings on record for this Lead. Any held meetings with this lead will show here.

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

Offline Enrollments

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

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



Notes

Note

Date

Lead was assigned to Madison Bettegnies.

May 26, 2020 02:22:50 PM

New Note

Click here to add a new Note to your lead

This section provides you with personal information about the lead



App



Recordings



Resources



Help

Information

Birthday

Gender

Female

Phone

(999) 999-9999

Email

Address

1331 S Curry Pike

Driver License

Permission to Contact

Edit

Click on the lead to link the two leads together

Medicare Details

Claim Number

Hospital Coverage

Medical Coverage

Edit

Related Leads

Harper Jo

May 12, 2020

Self Gen

Unlink Lead

Add Related Lead

Add a related lead to fill out multiple applications simultaneously

Select a lead to relate:

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

Cancel

Edit a Lead



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

Information ✕

First **Last**

Birthday

Gender Male Female

Phone

Email

Permission to Contact

Status **Source**

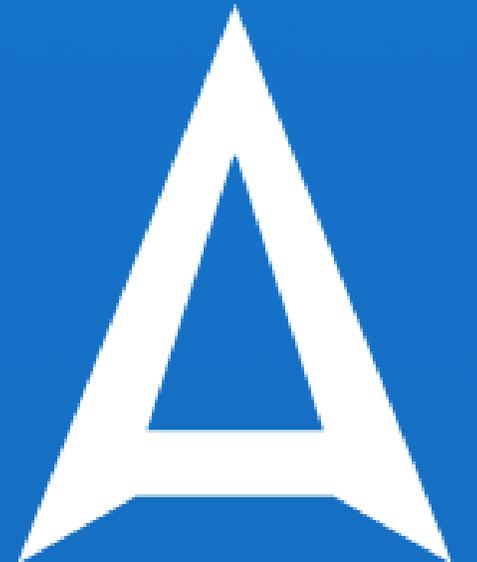
Address

City & County

State & Zip

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



The screenshot shows the Ascend CRM interface for a lead named 'Doe, Jane'. The user 'Madison Bettegnies' is logged in. The interface includes a sidebar with navigation options like Home, Leads, Recordings, Resources, and Help. The main content area shows appointment details for May 26, 2020, at 01:00 PM. A dialog box titled 'What kind of Scope of Appointment do you want to create?' is open, offering 'Electronic Form' and 'Paper Form' options. A callout box points to the 'Electronic Form' option.

Click here to begin creating an eSOA

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

The dialog box titled 'Select a Scope of Appointment Form' displays a list of available forms. The first item is 'Formulario de Confirmación del Alcance de una Cita de...' and the second is 'Scope of Appointment Form'. Both items have a right-pointing arrow next to them, indicating they are clickable.

Filling Out the eSOA



Select the products you plan to discuss

Then complete at least the required fields on the eSOA indicated by an asterisk

Meeting Details ✕

To be completed by the agent prior to meeting with beneficiary

Agent First Name:* Agent Last Name:*

Agent Phone Agent NPN:

Plan assigned agent ID:

Beneficiary Beneficiary

Phone* Address

City State

Zip Code County

Initial Method of Contact (check one):

Sales Event

Walk-In

Inbound Call

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

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

Beneficiary Signature Date:

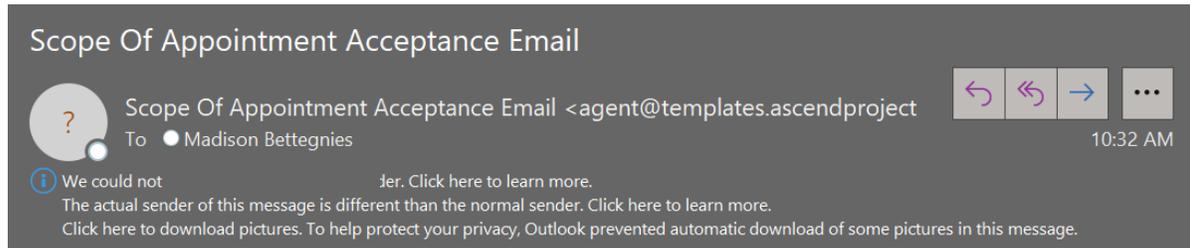
A box will populate prompting you to choose how you would like to send the invite. You can also select 'No' to only save the invite and not send it.

Click here to send the invite to the lead

Prospect View



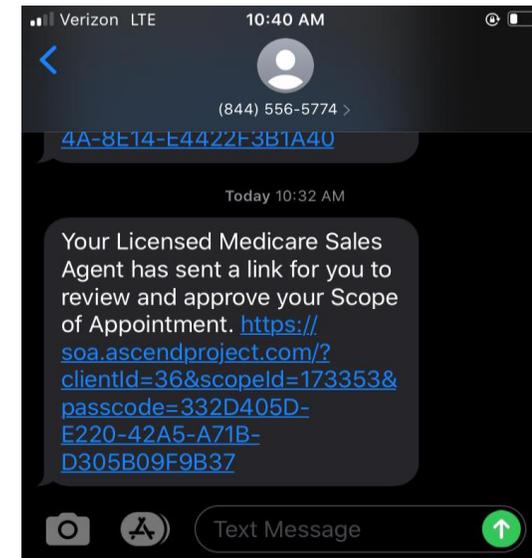
Email



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

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

Text



Do you approve of this Scope of Appointment?

Document Title and Instructions

Scope of Sales Appointment Confirmation Form

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

Products to Discuss

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

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

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

Beneficiary Information

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

Agent Information

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

Meeting Summary [Plan Use Only]

Initial Method of Contact: (Indicate here if the beneficiary was a walk-in)

Plan(s) the agent represented during this meeting:

Agent, if the form was signed by the beneficiary at time of appointment, provide explanation why SOA was not documented prior to meeting:

Agent Signature: Chris Jaffe

Product and Plan Descriptions

Stand-alone Medicare Prescription Drug Plans (Part D)

Medicare Health Maintenance Organization (HMO)

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

Medicare Advantage Plans (Part C) and Cost Plans

Medicare Health Maintenance Organization (HMO):

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

Medicare Preferred Provider Organization (PPO) Plan:

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

Medicare Private Fee-For-Service (PFFS) Plan:

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

Medicare Point of Service (POS) Plan:

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

Medicare Special Needs Plan (SNP):

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

Medicare Medical Savings Account (MSA) Plan:

MSA Plans combine a high deductible health plan with a bank account. The plan deposits money from Medicare into the account. You can use it to pay your medical expenses until your deductible is met.

Medicare Cost Plan:

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

Medicare Medicaid Plan (MMP):

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

Dental/Vision/Hearing Products

Prospect View of the eSOA



Beneficiary Agreement

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

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

Requested Meeting Date:

08/04/2017

Created Date:

8/4/2017 12:23:08 PM

Yes

No

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

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

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

Requested Meeting Date:

08/04/2017

Created Date:

8/4/2017 12:23:08 PM

Scope of Appointment Approved

They will get a confirmation of the meeting approval

Viewing an Accepted eSOA




Recordings


Resources


Help

Scheduled Meetings

Aug 04, 2017

-

● Accepted



Jul 04, 2017

-

● Accepted



[Schedule a Meeting](#)

Tap on the Accepted meeting to view the eSOA

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

Past Meetings

Aug 04, 2017

01:03 PM

Chris Jaffe

● Test Disposition



Aug 04, 2017

12:19 PM

Chris Jaffe

● Test Disposition



eSOA Status



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

Tap here if you want to resend the eSOA

Meeting #100009

● Pending

Start Meeting

Date: Jun 07, 2018

Held By: -

Time: -

Duration: -

Re-Send Text Invite

Approve Invite

Delete

Document Title and Instructions

Scope of Sales Appointment Confirmation Form

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

Products to Discuss

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

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

Stand-alone Medicare Prescription Drug Plans (Part D)

Done



PAPER SCOPE OF APPOINTMENT



Paper Scope of Appointment

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

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

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

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

Electronic Form

Paper Form

Close

Rescan

Cancel

Click 'Add Scan' to start adding scans

Requested Meeting Date: MM/DD/YYYY

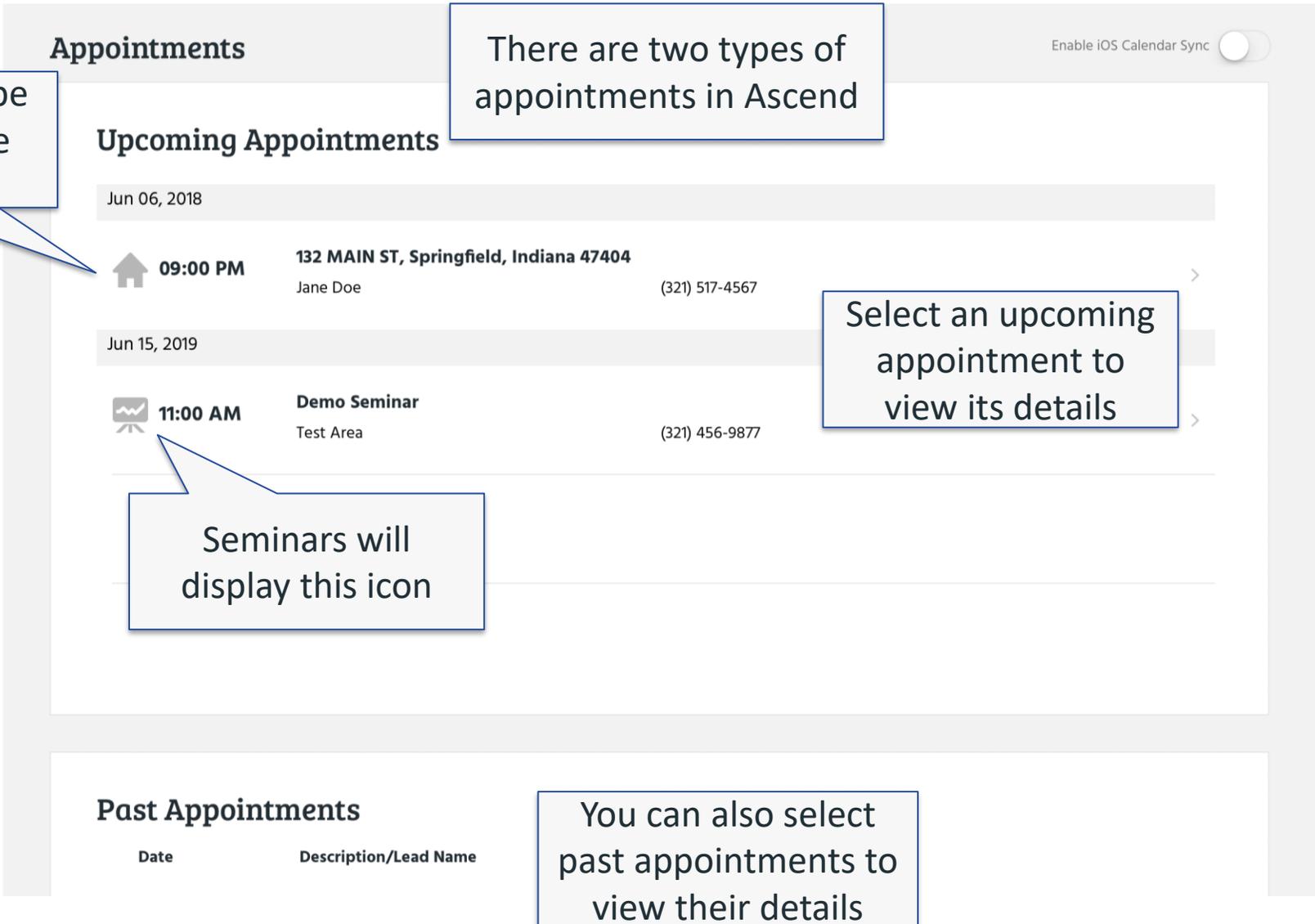
Add Scan

Done



APPOINTMENTS

Appointments



The screenshot shows the 'Appointments' section of the Ascend interface. At the top right, there is a toggle for 'Enable iOS Calendar Sync'. Below this is the 'Upcoming Appointments' section, which is divided into two dates: 'Jun 06, 2018' and 'Jun 15, 2019'. The first appointment is at 09:00 PM at 132 MAIN ST, Springfield, Indiana 47404, for Jane Doe, with phone number (321) 517-4567. The second appointment is at 11:00 AM, titled 'Demo Seminar' in the 'Test Area', with phone number (321) 456-9877. Below this is the 'Past Appointments' section, which is currently empty. A left sidebar contains navigation icons for 'Appointments', 'Recordings', 'Resources', and 'Help'. Callouts provide additional information: a house icon identifies home visits; a seminar icon identifies seminars; and arrows indicate that users can select upcoming appointments to view details and also select past appointments to view their details.

Home visits can be identified by the icon of a house

There are two types of appointments in Ascend

Enable iOS Calendar Sync

Upcoming Appointments

Jun 06, 2018

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

Jun 15, 2019

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

Past Appointments

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

Select an upcoming appointment to view its details

Seminars will display this icon

You can also select past appointments to view their details

Home Visit Info Screen



You can start a meeting from the Home Visit screen

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

Home Visit with Jane Doe

[Start Meeting](#)

May 26
01:00 PM

1331 S Curry Pike
Bloomington, Indiana. 47403

Contact
(812) 320-1832

[Go To Lead](#)

[Add Existing Scope](#)

[Get Directions](#)

[Cancel Appointment](#)

Click here to get directions to the Home Visit

Seminar Info Screen



Bryan Holland ¹
Unavailable Not Accepting Calls

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

Demo Seminar

June 15
11:00 AM

Test Area
N1249 County Road F

Contact
3214569877

Get Directions

Clicking here will take you to a larger map



Guest List

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

You can verify who did and did not attend a seminar



RECORDINGS

You can choose to upload using Wi-Fi or data plan

Only upload on WiFi

Upload All Recordings

Tap here to upload all recordings

Recordings

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

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

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

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



Home

Leads

Appointments

Recordings

Resources

Help



RESOURCES

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

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

Resources

Madison Bettegnies
Unavailable Accepting Calls

Bookmarked

File/Folder	Creation Date
AQE/VBE Training - External Agents	★ Mar 07, 2019 >
Blue Button Demo	★ Oct 16, 2019 >



- Appointments
- Recordings
- Resources**
- Help

Search resources here



Presentation Materials Agent Guidelines Other

Or tap on 'View Resources' below

[View Resources](#) [View Resources](#) [View Resources](#)



HELP



Help



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?



- RATE = Remote Agent Telephonic Enrollment
- A tool within the Ascend Mobile Application (AMA) enabling an agent to complete a health plan enrollment via a recorded phone call on their local device.
- RATE is available on all versions of AMA
 - iPad, Windows, & Android
- You will receive phone number, unique to you, to receive and place RATE calls directly from AMA.

Who benefits from RATE?



Your Beneficiary!

- By offering a RATE enrollment, your beneficiary will enjoy:
 - The convenience of completing an enrollment without being required to meet face-to-face
 - The security of knowing the enrollment is submitted electronically

You!

- This technology will help complete enrollments efficiently when you have a prospect who:
 - Cannot meet with you in person
 - You already met in person and they are now ready to enroll
 - Has no cellular or Wi-Fi access at home
- RATE helps you cut down on travel time, giving you more time to meet with prospects

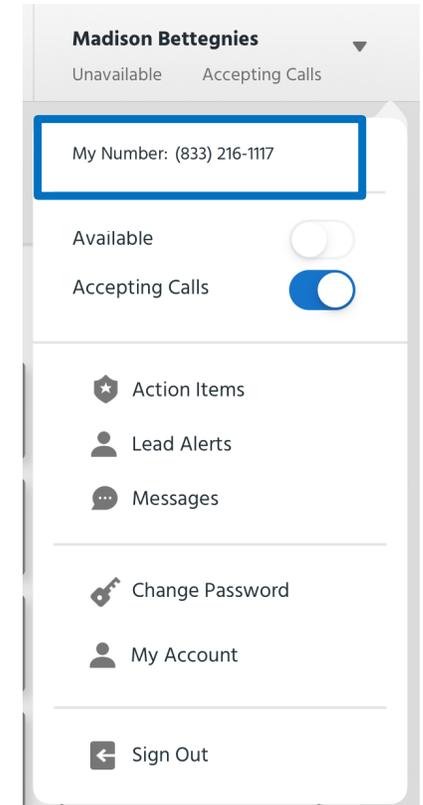


ACCEPTING A CALL

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.

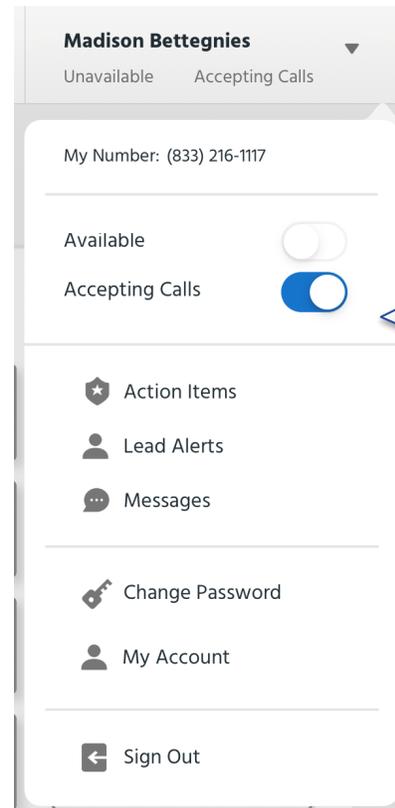


Note: 'Unavailable' does not relate to RATE. Please disregard.

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' indicator on the drop-down menu in AMA. You will receive the call through the Ascend app on your local device.



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

Receiving the Call



Ascend Madison Bettegnies
Unavailable Accepting Calls

Home
Leads
Appointments
Recordings

Welcome Madison

What would you like to do today?

2019 Allwell Sales Presentation
2019 Health Net Presentation
Agent Portal - AR
Agent Portal - AZ
Agent Portal - CA
Agent Portal - FL
Agent
Agent Portal - IN
Agent Portal - KS
Agent Portal - LA
Agent
Agent Portal - NM
Agent Portal - OH
Agent Portal - TX
Agent Portal - WI

Add a Resource tutorial
URLs in Windows and iOS

Incoming Call
You have an incoming call from:
Lead Name: Unknown
Phone Number: (812) 320-1832

Answer Call Reject Call

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

New Leads

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

Lead Screen



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

The screenshot shows the Ascend interface for a lead named 'Test, Harper'. The top left features the Ascend logo. The top right shows the user 'Madison Bettegnies' with status 'Unavailable' and 'Connected'. The lead's name 'Test, Harper' is displayed with a date 'Mar 07, 2019' and 'Self Generated'. Two buttons, 'Contact Lead' and 'Start a Meeting', are visible. The main content area is divided into sections: 'Appointments' (empty table), 'Past Meetings' (empty table), and 'Offline Enrollments' (empty table). A navigation pane on the left includes icons for Home, Leads, Appointments, Recordings, Resources, Help, and Call (highlighted with a green phone icon).

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

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

Start a Meeting



The screenshot shows the Ascend mobile application interface. At the top left is the Ascend logo. At the top right is a red button labeled "End Meeting". On the left side, there is a "Resources" icon. The main content area has the heading "Let's get started!" followed by a dropdown menu for "This health plan will cover:" set to "Harper Test" and a text input field for "Your current zip code is". A blue "Continue" button is positioned below these fields. A white recording disclaimer overlay is centered on the screen, containing the following text:

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

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

At the bottom of the disclaimer are two buttons: "Agree" and "Do Not Agree". A white callout box with a blue border points to the disclaimer with the text: "The recording disclaimer will appear."

Step 3



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

RATE Telephonic Enrollment Script - English



1 of 9

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

Telephonic Enrollment Call

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

TELEPHONIC ENROLLMENT

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

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

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

Remember to add the buy up package if the



MAKING A CALL

Making A Call



- RATE can now be used to place an outbound call to a beneficiary!
- In order to place the call, you'll need to create a lead profile for your beneficiary if one does not already exist in your Ascend Mobile Application.

Making A Call



ASCEND

Flagpole Healthcare

Torrance, Jack

| Sep 13, 2022 | Self Generated

Appointments

Appointment Type	Start Date	Start Time	Status
There are no upcoming Appointments for this lead.			

Past

Appointment Type	Start Date	Start Time	Status
There are no past Appointments for this lead.			

[Create Scope of Appointment](#) | [Create Home Visit](#) | [Schedule Virtual Meeting](#)

Contact Lead Start a Meeting

Select 'Contact Lead'

Select 'Call Lead' to place an outbound call to your Lead.
Ascend will call the Primary Phone number associated with your Lead

Contact Lead

- Create Scope of Appointment
- Send Invite to Virtual Meeting
- Call Lead



ASCEND QUOTE & ENROLLMENT



GETTING STARTED

Start a Meeting in AMA



Ascend Madison Bettegnies
Unavailable Accepting Calls

Home Leads Appointments Recordings

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

Contact Lead **Start a Meeting**

Do you have a Scope of Appointment?

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

Enter Scope of Appointment ID (Option...)

Start Meeting Cancel Meeting

Offline Enrollments

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

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

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



Recording Disclaimer

Recording Disclaimer

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

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

Agree

Do Not Agree

Click Agree to record the meeting

Click Do NOT Agree to not record the meeting

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

Name & Zip Code



Not Recording 00:00:02 | End Meeting



Resources

Let's get started!

This health plan will cover: **Harper Jo** ▼

Your current zip code is

Continue

Verify the beneficiary's name and zip code here.

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

Zip Code with Multiple Counties



The screenshot shows the Ascend web application interface. At the top left is the Ascend logo. Below it are logos for allwell, HealthNet, OHANA, WellCare, and WellCare TexanPlus. On the top right, there is a 'Not Recording' indicator with a timer at 00:00:02 and an 'End Meeting' button. Below these are 'Type Size' controls and a 'Home' link. A navigation bar contains five items: 'Health Profile', '1 ZIP Code', '2 Blue Button', '3 My Drugs', '4 My Doctor', and '5 Our Plans'. The main content area displays the question 'What county do you live in?' with two radio button options: 'Greene' (selected) and 'Monroe'. A blue 'Continue' button is at the bottom. A callout box with a blue border and a pointer to the form contains the text: 'If there are multiple counties for a zip code, select the correct county.'



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



Ascend Jane Doe

Not Recording 00:00:21 End Meeting

Lead Details

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

Blue Button from Medicare

Using the Medicare Blue Button connection, many consumers can import their Doctors, Prescriptions, and Pharmacies from the previous year. This will assist in choosing a new plan for this year by allowing you to have a complete history loaded in the health plan selection tool.

You have full control over how your data can be used by logging into MyMedicare.gov in a few easy steps.

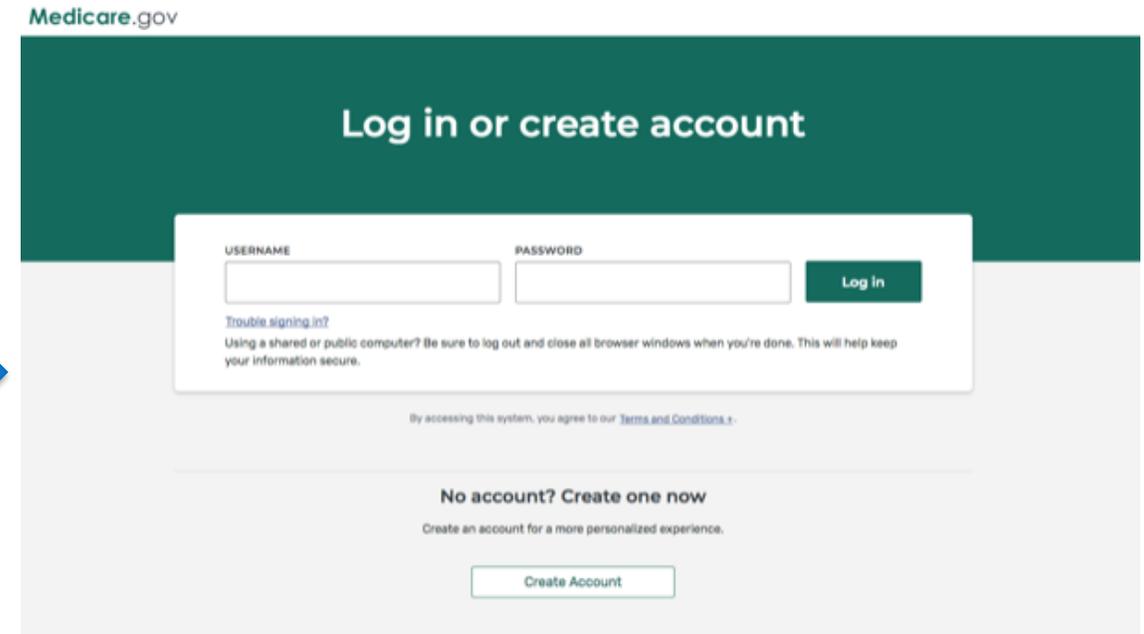
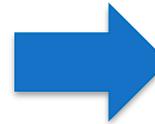
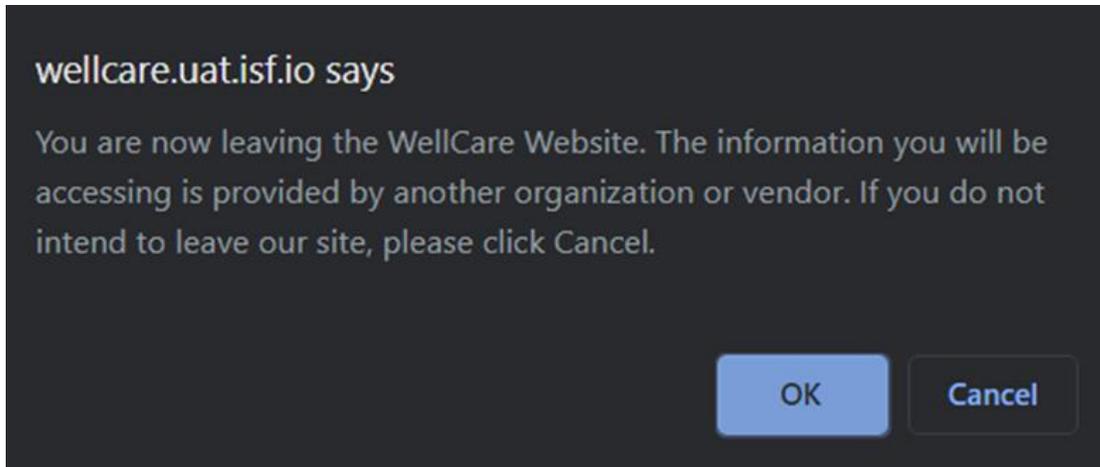
Connect to MyMedicare.gov No, I prefer to enter my information manually

Will take you to MyMedicare.gov

Will take you to the next lookup tool

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

How to Access Blue Button 2.0 (cont.)



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

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



Creating a MyMedicare.gov Account

How to Create a MyMedicare.gov Account



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

The screenshot shows the Medicare.gov website interface. At the top left, the text "Medicare.gov" is visible. The main heading is "Log in or create account" in white text on a dark green background. Below this, there is a white login form with two input fields: "USERNAME" and "PASSWORD". To the right of the password field is a dark green "Log In" button. Below the input fields, there is a link for "Trouble signing in?" and a security notice: "Using a shared or public computer? Be sure to log out and close all browser windows when you're done. This will help keep your information secure." At the bottom of the form, there is a small text: "By accessing this system, you agree to our Terms and Conditions." Below the login form, there is a section for account creation with the heading "No account? Create one now" and the text "Create an account for a more personalized experience." A blue-bordered button labeled "Create Account" is highlighted at the bottom of this section.



Accessing Information

Permission to Access Medicare Data



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

Medicare.gov

Ascend Quote & Enrollment

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

Ascend Quote & Enrollment will be able to:

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

Understand the risks:

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

Allow Deny

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

Permission to Access Medicare Data



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

Medicare.gov

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

Information about your doctor/hospital visits

Information about the prescription medications you take

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

Privacy Options

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

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

Understand how your data is being used

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

Allow [Deny](#)

Adding pharmacy



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

What pharmacy do you use?

Search by pharmacy name

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

Here are the pharmacies you have used previously.

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

Map Satellite Terrain

Walmart Supercenter

Database last updated on June 05, 2020

[Continue](#)

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

My Pharmacy

Name	Location	
Wal-Mart Pharmacy 10-1991	IN 47403	Remove

Database last updated on June 05, 2020

[Continue](#)

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

Adding drugs



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

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

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

1 2 3 4 5

What drugs are you taking?

Search By Drug Name

Lisinopril

DosageForm

What dosage do you take?

Lisinopril Tablet Oral 10 MG

How much do you need?

- 1 +

How long does the prescription last?

Every 1 month

Every 2 months

Every 3 months

U V W X Y Z

My Prescriptions

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

Database last updated on June 05, 2020

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

Adding Doctors



The ability to search for doctors will follow the normal flow

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

Who is your doctor?

Search by Doctor Name

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

Here are the providers you have used previously.

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

Database last updated on February 6, 2018

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

Adding Doctors (cont.)



My Doctor

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

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

Database last updated on February 6, 2018

Continue



Pharmacy Search Manual Entry



Lead Details



mbettegnies Home Agent Portal Saved Applications Agent Credit URL Log Off

Type Size A A

Notes

Resources

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

Do you want a specific pharmacy covered?

Yes

No

Clicking Yes will take you to the lookup tool

Clicking No will take you to the next lookup tool

Lead Details



mbettegnies Home Agent Portal Saved Applications Agent Credit URL Log Off

Type Size A A

Notes

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

What pharmacy do you use?

Search by pharmacy name

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

Database updated on June 05, 2020

Skip

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

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

Health Profile

ZIP Code

My Drugs

My Doctor

Our Plans

What pharmacy do you use?

Search by pharmacy name

ZIP Code: 90015

Within: 5 Miles

More

Mail Order

Retail

Preferred

CALIFORNIA HOSPITAL MEDICAL CENTER PHARMACY

1401 S Grand Ave, Los Angeles, CA 90015
0.14 Miles

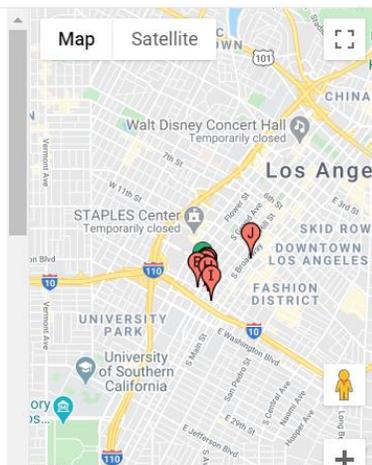
GRAND SPEICALTY PHARMACY

1513 S Grand Ave, Los Angeles, CA 90015
0.2 Miles

AHF PHARMACY

1400 S Grand Ave, Los Angeles, CA 90015
0.2 Miles

AHF PHARMACY



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

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

My Pharmacy

Name

Location

California Hospital Medical Center Pharmacy

1401 S Grand Ave CA 90015

[Remove](#)

Database last updated on May 01, 2020

Continue



Formulary Search Manual Entry



Navigation bar with back, forward, refresh, and share icons.

Lead Details sidebar with icons for Lead Details, Notes, and Resources. Main navigation includes Health Profile, ZIP Code, Blue Button, My Drugs, My Doctor, and Our Plans.

Do you take any prescription drugs?

Yes

No

Clicking Yes will take you to the lookup tool

Clicking No will take you to the next lookup tool

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

Navigation bar with back, forward, refresh, and share icons.

Lead Details sidebar with icons for Lead Details, Notes, and Resources. Main navigation includes Health Profile, ZIP Code, Blue Button, My Drugs, My Doctor, and Our Plans.

What drugs are you taking?

Search By Drug Name

Browse Alphabetically

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

Skip Database last updated on June 05, 2020



What drugs are you taking?

lisin Clear Q

Lisinopril + Add

Lisinopril-Hydrochlorothiazide + Add

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

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

Browse Alphabetically

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

Showing: 1 to 10 of 250

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



Wellbutrin XL
DosageForm

What dosage do you take?

Wellbutrin XL Tablet Extended Release 24 Hour Oral 150 MG

Wellbutrin XL Tablet Extended Release 24 Hour Oral 300 MG

Packages

Bottle of 30 Tablet Extended Release 24 Hour

Bottle of 15 Tablet Extended Release 24 Hour

How many packages do you need?

- 1 +

How long does the prescription last?

Every 1 month

Every 2 months

Every 3 months

Add to Prescriptions **Cancel**

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

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

wellcare.uat.isf.io says

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

OK **Cancel**

Clicking Ok will add the generic alternative.

Clicking Cancel will add the name brand.



U V W X Y Z

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

My Prescriptions

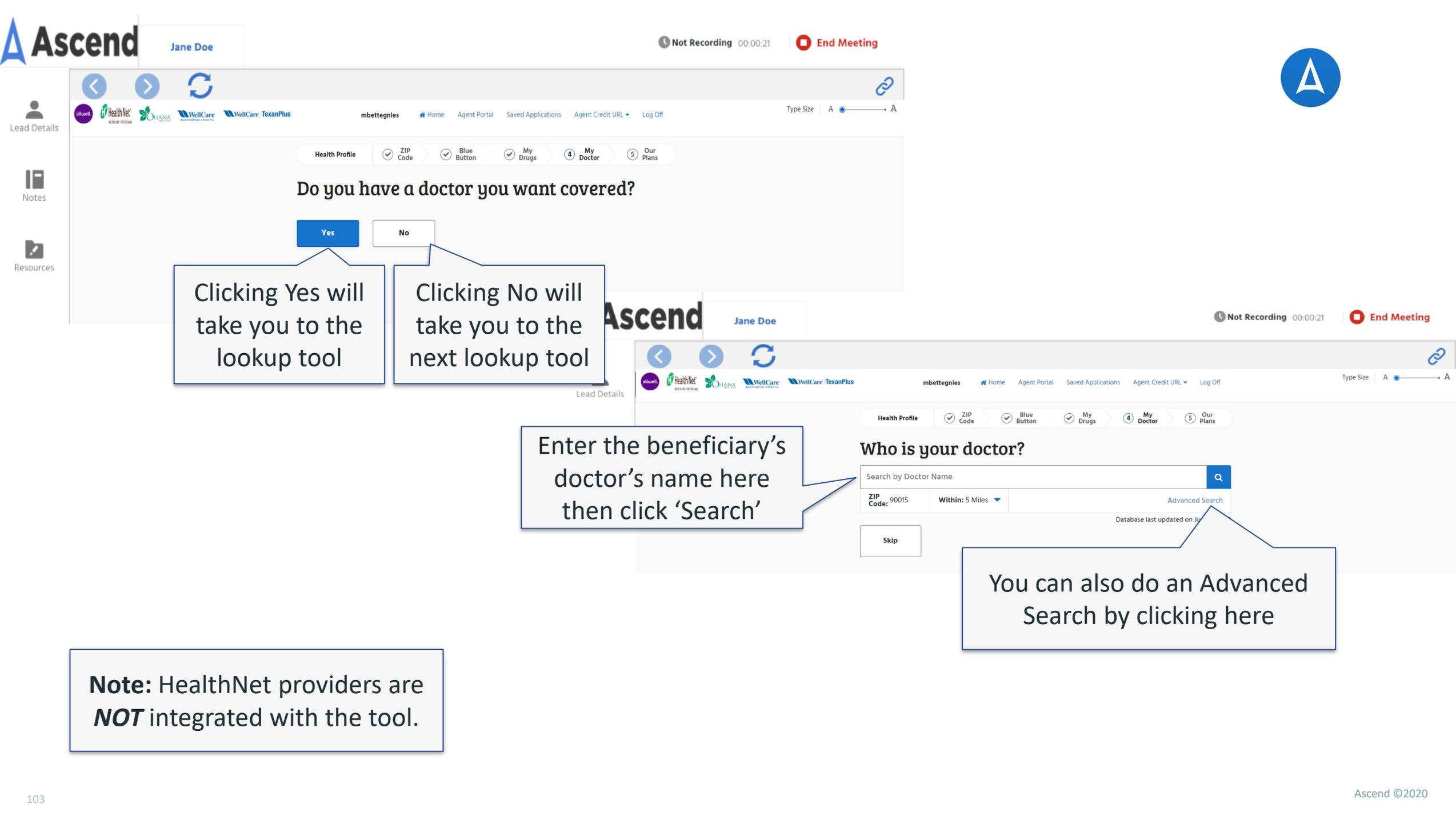
Drug Name	Dosage		
Lisinopril	Lisinopril Tablet Oral 2.5 MG refilled every 30 days	 Remove	 Edit
BuPROPion HCI ER (XL)	BuPROPion HCI ER (XL) Tablet Extended Release 24 Hour Oral 300 MG refilled every 30 days	 Remove	 Edit

Database last updated on May 01, 2020

Continue



Doctor Search Manual Entry



Clicking Yes will take you to the lookup tool

Clicking No will take you to the next lookup tool

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

You can also do an Advanced Search by clicking here

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

Advanced Search



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

Who is your doctor?

Advanced Search

Doctor's Details

Doctor's Name

Gender Male Female

Services & Coverage

Specialty

New Patients Yes No

Primary Care Provider Yes No

Network All

Medicare Plan

Location

Street

State

City

ZIP Code

Radius

Search

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

Doctor's Name

Gender

Services & Coverage

Specialty

New Patients

Primary Care Provider

Network

Medicare Plan

- Plan
- WellCare Freedom (HMO D-SNP)
- WellCare Best (HMO)
- WellCare Plus (HMO)
- WellCare Dividend (HMO)
- Health Net Gold Select (HMO)
- Health Net Healthy Heart (HMO)
- Health Net Seniority Plus Sapphire (HMO)
- Health Net Seniority Plus Green (HMO)
- Health Net Seniority Plus Sapphire Premier (HMO)
- Health Net Seniority Plus Sapphire Premier II (HMO)
- Health Net Jade (HMO C-SNP)
- Health Net Seniority Plus Amber I (HMO D-SNP)
- Health Net Seniority Plus Amber II (HMO D-SNP)
- WellCare Classic (PDP)
- WellCare Value Script (PDP)
- WellCare Wellness Rx (PDP)
- WellCare Medicare Rx Value Plus (PDP)
- WellCare Medicare Rx Saver (PDP)
- WellCare Medicare Rx Select (PDP)**



Lead Details

Notes

Resources

Health Profile

ZIP Code

My Drugs

3 My Doctor

4 Our Plans

Who is your doctor?

Search by Doctor Name



ZIP Code: 90015

Within: 5 Miles

Advanced Search

Showing: 1 to 10 of 680

Bonman, Shauntelle Primary Care Provider

Allopathic & Osteopathic Physicians, Family Medicine

NPI: 1811272719

1400 S Grand Ave, Los Angeles, CA 90015

[More](#)

0.3 Miles Accepting Patients

+ Add

Kohan, Rozalin Primary Care Provider

Student, Health Care, Student in an Organized Health Care

Education/Training Program

NPI: 1255746145

1400 S Grand Ave, Los Angeles, CA 90015

[More](#)

0.3 Miles Accepting Patients

+ Add

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

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

Click 'More' to view Doctor Details

My Doctor

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

Database last updated on May 1, 2020

Continue

Doctor Details



Bonman, Shauntelle

1400 S Grand Ave , Ste 700 , Los Angeles, CA 90015.

NPI:	1811272719
Gender:	Female
Accepting Patients:	New and Existing
Primary Care Provider:	Yes
Office:	213-765-7500
Fax:	213-765-7491
Languages:	SPANISH

Additional Locations:

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

Hours

Wednesday:	09:00 AM - 05:00 PM
Monday:	09:00 AM - 05:00 PM
Thursday:	09:00 AM - 05:00 PM
Tuesday:	09:00 AM - 05:00 PM
Friday:	09:00 AM - 05:00 PM

Accepted Plans:

WellCare Dividend (HMO)

WellCare Best (HMO)

WellCare Freedom (HMO D-SNP)

WellCare Plus (HMO)

[Add to My Doctors](#)

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



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



Navigation: < > Refresh

Lead Details: Notes Resources

Logos: Allstate, HealthNet, OHANA, WellCare, WellCare TexanPlus

mbettegnies Home Agent Portal Saved Applications Agent Credit URL Log Off

Type Size A A

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

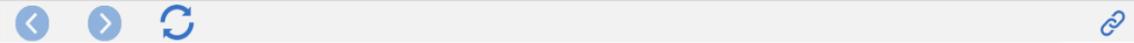
Do you need extra (financial) help?

Extra Help eligibility is dependent on your income. If you qualify, it can help lower the cost of your prescription drug premium and your prescription drugs, too. It also allows you to apply for a new prescription drug plan at certain times throughout the year. To check eligibility status, enter the information below and click the Check button. To skip this check, simply click on Skip next to the Save & Continue button.

Yes No

Clicking Yes will take you to the verification tool

Clicking No will take you to the Quotes page



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

Check Extra Help Eligibility Status

Extra Help Medicaid Both

First Name Last Name

Your Birthday Medicare Number

Check Status

Skip

For Extra Help only, select the Extra Help radio button.

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

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

Check Extra Help Eligibility Status

Extra Help Medicaid Both

First Name Last Name

Your Birthday Medicare Number

Medicaid Number Medicaid State

Social Security Number Gender

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

Note*: To complete a Medicaid Verification/Eligibility check for **California Medicaid - Medi-Cal**, please call our Special Populations Medicaid Eligibility line Monday through Friday, 8 AM to 8 PM EST, Saturday and Sunday, 8 AM to 5 PM EST, at 866 - 211 - 0544.

Check Status

The radio button selection determines what fields are visible.

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

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



SELECTING A PLAN – QUOTES PAGE



Click here to send a Quick Quote

Send Quote

List

Compare

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

2021 Medicare Plans

Below are the plans that are available in ZIP Code 90015 in Los Angeles County, California: Let's start your enrollment.

ZIP Code: 90015

Update

Filter Plans

Click here to Filter Plans.

Medicare Advantage

Prescription Drug Plan

Select for Comparison

Check off plans to compare.

Health Net Sapphire (HMO)

\$28⁵⁰/month



Plan Covers

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

In-Network Copay

- Primary Care Physician: \$0
- Emergency Room: \$120
- Specialist: \$0
- Maximum Out-of-Pocket: \$3,450 Annual In-Network.

Provider Looku

Click here to view more details about a plan

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

Apply Now

View Details

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

Plan Comparison



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

Medicare Plans

Reset Plans | List | Compare

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

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

Plan Filtering



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

2021 Medicare Plans [Send Quote](#) [List](#) [Compare](#)

Below are the plans that are available in ZIP Code **90015** in Los Angeles County, California:
Let's start your enrollment.

ZIP Code: [Update](#) [Filter Plans ^](#)

Filter Plans

Max Monthly Premium?
\$81

Max Out Of Pocket?
\$5250

[Reset Filters](#)

Plan Type?

- All (19 plans)
- HMO (9 plans)
- HMO SNP (4 plans)
- PDP (6 plans)

Benefits?

- Dental
- Vision
- Hearing
- Rx

A variety of filtering options will appear to allow you to narrow down the search.

Click here to Filter Plans.

Plan Details



[Back To Quotes](#)

Click here to return to the previous screen

WellCare Plus HMO

Apply Now

Click here to start an enrollment

Plan Specifics

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



Medicare-Covered Medical Benefits

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

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

Prescription Drug Benefits

Coverage Type: Part D

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

Plan Documents

[Formulary](#)

[Summary of Benefits](#)

Apply Now

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

Click here to start an enrollment



THE ENROLLMENT APPLICATION



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

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

Lead Details | Notes | Resources

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

[Back to Shopping](#)

WellCare Plus (HMO) \$6⁷⁰/month

Tell us about yourself

Personal Information

ATTENTION: You are beginning your application for enrollment. This application is for people with Medicare who want to join a Medicare Advantage Plan or Prescription Drug Plan. To join a plan you must be a United States citizen or be lawfully present in the U.S. and live the plan's service area.

Prefix:

First Name: Middle Initial:

Last Name: Gender: Male Female

Your Birthday: mm/dd/yyyy Email: you@example.com

Phone: 8888888888 Mobile Phone: 8888888888

Please know that by providing your email address, you are agreeing to receive emails from us. We will give you the opportunity to opt in and you may always opt out of future email communications.

* Required Information

Next

Save Send for Signature

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

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

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



Lead Details

Notes

Resources

[Back to Shopping](#)

[Refresh](#)
[Share](#)

WellCare Plus (HMO)

\$6⁷⁰/month

Where do you live?

Permanent Residence Street Address (Don't enter a PO Box)

Address 1: Address 2:

City:

State: Zip: County:

Mailing address, if different from your permanent address (PO Box allowed)

Mailing Address 1: Mailing Address 2:

Mailing City:

Mailing State: Mailing Zip: Mailing County:

* Required Information

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

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



Lead Details

Notes

Resources

Back to Shopping

WellCare Plus (HMO) \$6⁷⁰/month

Who is your emergency contact?

Emergency Contact (Optional)

First Name:

Last Name:

Relationship to you:

Phone:

Back Next

Save Send for Signature

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.



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

Lead Details Medicare Details 1 PCP 2 Insurance Info 3 Medicare Status 4 Other Details

Back to Shopping WellCare Plus (HMO) \$6⁷⁰/month

Who is your primary doctor?

Please Choose a Primary Care Physician (PCP), Clinic or Health Center. (First and Last Name of PCP)

Primary Care Provider ID (PCP ID): Provider Lookup

Provider First Name: Provider Last Name:

To find the IPA ID, use the provider look up tool to locate your Primary Care Provider. Please type the provider ID listed within the FAP tool in the IPA ID field below.

IPA ID:

If a valid PCP is not selected or I do not wish to select a PCP, a PCP will be assigned for me. The PCP assignment may be changed at any time by calling the customer service number on the Member ID Card.

Primary Care Provider Office Address

Are you a current patient?
 Yes No

Back Next

Save Send for Signature

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

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

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



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

Lead Details

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

Back to Shopping

WellCare Plus (HMO) \$6⁷⁰/month

Your insurance information

Medicare Insurance Information

You must have Medicare Part A or Part B (or both) to join a Medicare prescription drug plan. Please take out your red, white and blue Medicare card to complete this section. Fill out this information as it appears on the Medicare card.

Medicare Number: *

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

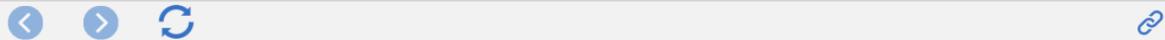
Verify

* Required Information

Back **Next**

Save **Send for Signature**

Part A and Part B Effective Dates are not required for 2021 plans.



- Medicare Details
- ✓ PCP
- ✓ Insurance Info
- 3 Medicare Status
- 4 Other Details

Back to Shopping

WellCare Plus (HMO)

\$6⁷⁰/month

What is your current Medicare situation?

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

- Annual Election Period (AEP)**
You are selecting this plan Medicare's annual Open Enrollment Period, which runs from October 15 through December 7. The plan must get your completed form by December 7. Your plan's coverage will be effective beginning January 1.
- I am new to Medicare.**
If you are new to Medicare due to loss of employer group or union coverage, please refer to the "I am leaving employer or union coverage" SEP option below.
- My situation falls under one of the Special Election Period circumstances.**
Special Election Period (SEP) – You may use an SEP outside of the usual ICEP, IEP, or AEP.

Required Information

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

If none of these statements applies to you or you're not sure, please contact WellCare at 1-866-527-0056 to see if you are eligible to enroll. We are open 8 a.m. to 8 p.m., 7 days a week. TTY users should call 711.

Back

Next

Save

Send for Signature

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

My situation falls under one of the Special Election Period circumstances. Special Election Period (SEP) – You may use an SEP outside of the usual ICEP, IEP, or AEP.

Required Information

Special Election Period Options

If none of these statements applies to you or you're not sure if you are eligible to enroll, please contact us at our Toll-Free number 1-866-527-0056 to see if you are eligible to enroll.

- I am enrolled in a Medicare Advantage plan and want to make a change during the Medicare Advantage Open Enrollment Period (MA OEP).
- I recently moved outside of the service area for my current plan or I recently moved and this plan is a new option for me. I moved on mm/dd/yyyy
- I recently was released from incarceration. I was released on mm/dd/yyyy
- I recently returned to the United States after living permanently outside of the U.S. I returned to the U.S. on mm/dd/yyyy
- I recently obtained lawful presence status in the United States. I got this status on mm/dd/yyyy
- I recently had a change in my Medicaid (newly got Medicaid, had a change in level of Medicaid assistance or lost Medicaid) on mm/dd/yyyy
- I recently had a change in my Extra Help paying for Medicare prescription drug coverage (newly got Extra Help, had a change in the level of Extra Help or lost Extra Help) on mm/dd/yyyy
- I have both Medicare and Medicaid (or my state helps pay for my Medicare premiums) or I get Extra Help paying for Medicare prescription drug coverage, but I haven't had a change.
- I am moving into, live in or recently moved out of a Long-Term Care Facility (for example, a nursing home or Long-Term Care Facility). I moved/will move into/out of the facility on mm/dd/yyyy
- I recently left a PACE program on mm/dd/yyyy
- I recently involuntarily lost my creditable prescription drug coverage (coverage as good as Medicare's). I lost my drug coverage on mm/dd/yyyy
- I am leaving employer or union coverage on mm/dd/yyyy
- I belong to a pharmacy assistance program provided by my state.
- My plan is ending its contract with Medicare, or Medicare is ending its contract with my plan.
- I was enrolled in a plan by Medicare (or my state) and I want to choose a different plan. My enrollment in that plan started on mm/dd/yyyy
- I was enrolled in a Special Needs Plan (SNP), but I have lost the special needs qualification required to be in that plan. I was disenrolled from the SNP on mm/dd/yyyy
- I was affected by a weather-related emergency or major disaster (as declared by the Federal Emergency Management Agency (FEMA)). One of the other statements here applied to me, but I was unable to make my enrollment because of the natural disaster.
- Other
- I am enrolled in a plan placed in receivership.
- I am enrolled in a plan identified by CMS as a Consistent Poor Performer.
- I lost my coverage because Medicare ended its contract with my plan. I got a letter from Medicare saying I could join another plan.
- I live in a long-term care facility, like a nursing home or a rehabilitation hospital.
- I'm new to Medicare, and I was notified about getting Medicare after my Part A and/or Part B coverage started.
- I already have Hospital (Part A) and recently signed up for Medical (Part B). I want to join a Medicare Advantage Plan.
- I have had Medicare prior to now, but am now turning 65.
- I am currently receiving extra help paying for Medicare prescription drug coverage, but do not have Medicaid.
- My plan is being terminated by Medicare.
- In the last 12 months, I joined a Medicare Advantage plan with prescription drug coverage when I turned 65.
- In the last 12 months, I left a Medigap policy to join a Medicare Advantage Plan for the first time (Medicare Advantage plan with prescription drug coverage).
- I am enrolling in a 5-star Medicare plan.



←
→
↺
↻
🔗

Medicare Details
✓ PCP
✓ Insurance Info
✓ Medicare Status
4 Other Details

[Back to Shopping](#)

WellCare Plus (HMO) \$6⁷⁰/month

Other living situations and health services

Important Questions - Please answer the following questions

Some individuals may have other drug coverage, including other private insurance, TRICARE, Federal employee health benefits coverage, VA benefits, or State pharmaceutical assistance programs. Will you have other prescription drug coverage in addition to Wellcare/Ohana/Wellcare TexanPlus Healthcare Plans? *

Yes No

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

Yes No

Are you enrolled in your State Medicaid program? *

Yes No

Do you or your spouse work?

Yes No

* Required Information

Document Preferences

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

- Spanish (where available)
- Chinese (where available)
- Korean (where available)
- Vietnamese (where available)
- Tagalog (where available)
- Large Print

Please contact WellCare, WellCare TexanPlus, Ohana if you need information in an accessible format or language other than what is listed above at 1-866-527-0056. Our office hours are between October 1 and March 31, representatives are available Monday – Sunday, 8 a.m. to 8 p.m. Between April 1 and September 30, representatives are available Monday – Friday, 8 a.m. to 8 p.m. TTY users should call 711.

Back

Next

Save

Send for signature

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



Lead Details

Notes

Resources



Health Questions 1 Authorization 2 Payment

Back to Shopping

WellCare Plus (HMO)

\$6⁷⁰/month

Information Authorization

Disclosure Overview

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

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

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

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

Signature of Applicant:

Signature Date:

* Required Information

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

Relationship

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

I am the person listed on this enrollment form

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

* Required Information

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

Back Next

Save Send for signature



Lead Details

Health Questions Authorization **2** Payment

[Back to Shopping](#)

WellCare Plus (HMO) \$6⁷⁰/month

Notes

Resources

Plan Payment

Please select a payment method:

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

Payment Overview

Payment Frequency ▾

Extra Help ▾

Late Payments ▾

[Back](#) [Next](#)

[Save](#) [Send for signature](#)

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



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

Lead Details | Review & Purchase | 1 Review

Review \$6⁷⁰/month

[Apply Now](#)

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

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

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

[Apply Now](#)

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

Click 'Apply Now' to submit the Enrollment Application.

Confirmation



Ascend Jane Doe

Not Recording 00:00:21 End Meeting

Lead Details

Notes

Resources

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

You have completed your enrollment for WellCare Dividend Home (HMO)

Please keep this Confirmation Number for your records: **4010224**

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

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

Value-Based Enrollment

Start Transitioning to Your New Plan Now!

Wellness Advocates are standing by to help you transition to your new plan. They will schedule your Annual Wellness Visit and gather important information related to your healthcare needs.

Select your preferred language for the call:
 English Spanish

Call Me Now
Have a Wellness Advocate call you now.

Schedule a Call
Set a date/time to speak with a Wellness Advocate.

Decline
Decline to speak with a wellness Advocate.

Agent Completed
Have your agent complete it online with you now.

Make sure to give them the confirmation number

This is where you start the VBE Program

Click here to select language

You can also email them their confirmation number.

Click here to print the application summary & confirmation number



VALUE BASED ENROLLMENTS (VBE)



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, place an OTC order and/or help set up an Annual Wellness visit with their PCP
 - It is that simple!
 - However, there are some important steps and considerations for you to be successful...

Who Benefits from VBE?



- **The Health Plan!**

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

- **You!**

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

- **Your Beneficiary!**

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



INITIATING THE VBE PROCESS

Initiating the VBE Process



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

Explaining the VBE Process



Invite your new member to participate in VBE



They are *not required* to do this



Note:

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

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



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

Selecting the Outcome Decided by the Beneficiary



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

You have completed your enrollment for WellCare Dividend Prime (HMO)

Please keep this Confirmation Number for your records: **4010224**



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



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

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

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



Start Transitioning to Your New Plan Now!

Wellness Advocates are standing by to help you transition to your new plan. They will schedule your Annual Wellness Visit and gather important information related to your healthcare needs.

Select your preferred language for the call:
 English Spanish

-  **Call Me Now**
Have a Wellness Advocate call you now.
-  **Schedule a Call**
Set a date/time to speak with a Wellness Advocate.
-  **Decline**
Decline to speak with a wellness Advocate.
-  **Agent Completed**
Have your agent complete it online with you now.

“Call 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.

Agent Completed allows for an agent in the field to complete a HRA + place an OTC order on the spot.



AGENT COMPLETED VBE – HRA

Agent Completed – NEW!



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

You have completed your enrollment for WellCare Dividend Prime (HMO)

Please keep this Confirmation Number for your records: **4010224**



Email Confirmation

Click here to have your confirmation number emailed to you



Print Application

Click here to print this page with your Confirmation Number

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

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



Start Transitioning to Your New Plan Now!

Wellness Advocates are standing by to help you transition to your new plan. They will schedule your Annual Wellness Visit and gather important information related to your healthcare needs.

Select your preferred language for the call:
 English Spanish



Call Me Now
Have a Wellness Advocate call you now.



Schedule a Call
Set a date/time to speak with a Wellness Advocate.



Decline
Decline to speak with a wellness Advocate.



Agent Completed
Have your agent complete it online with you now.

Select the 'Agent Completed' VBE option

Health Risk Assessment - Add



Need Help?
Phone Number: 866-822-1339
Hours: 8am - 8pm EST M-F

Necesitas ayuda?
Numero de Teléfono: 866-822-1339
Horas: 8am - 8pm EST M-F

Home

Back To VBE Search

A_A_A Print

Health Risk Assessment - Add

Agent-Assisted VBE
Current Health Conditions
1. What Health conditions do you currently have?

Asthma:

COPD:

Other breathing or lung conditions:

Heart disease:

Heart failure:

High blood pressure:

Kidney disease or kidney failure:

Diabetes or high blood sugar:

Cancer:

HIV or AIDS:

Behavioral or mental health conditions:

None:

General Health Topics

Finish Later

>>

Complete the Health Risk Assessment with your new member

Allows you to save the HRA to complete later from the Agent Portal

Allows you to move forward to the OTC ordering



DECLINE

Declining the VBE Process



The screenshot shows a web application interface with a dark grey confirmation dialog box in the foreground. The dialog box has a title bar that says "Wellcare.isf.io says" and contains the text: "You are declining the opportunity to get started on your transition process. Is that correct?". At the bottom of the dialog are two buttons: "OK" and "Cancel".

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

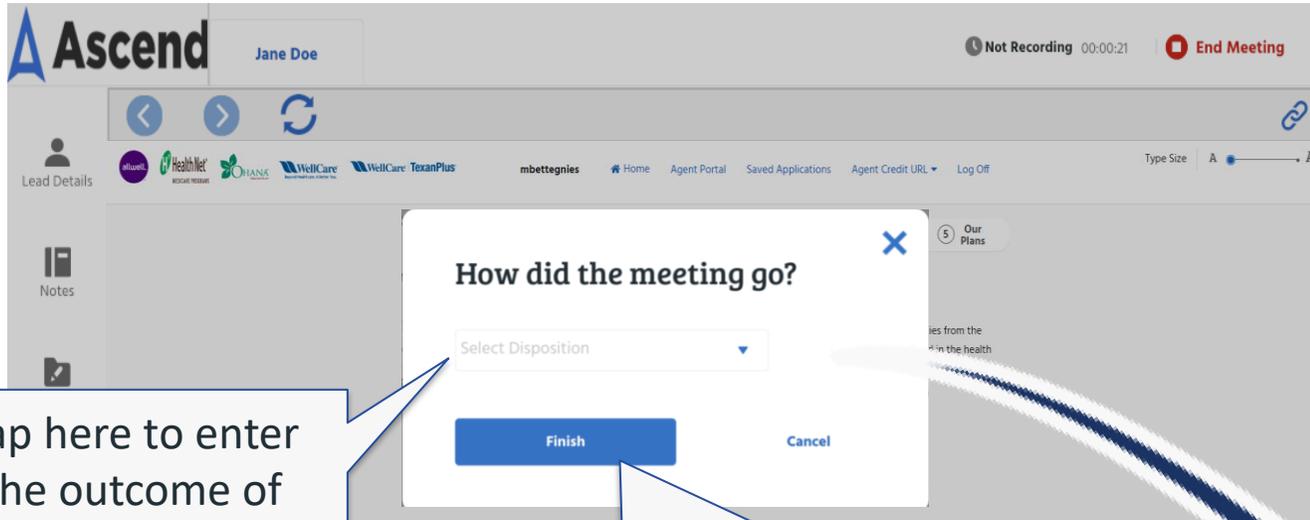
- Buttons for "Email Confirmation" and "Print Application".
- A note: "NOTE: We will not keep the email address entered on file. It will be used for the sole purpose of sending an enrollment confirmation receipt."
- Text: "If you have any questions about your pending application, please call Allwell at the number listed below and have your confirmation number ready." followed by contact information: "Call for more information: Phone: 1-855-766-1541 TTY: 711 Monday thru Friday: 9AM - 5PM All Time Zones (excluding holidays)".
- A sidebar with three options: "Connect Me Now" (Have a Value Based Enrollment Wellness Advocate call you now), "Schedule a Callback" (Schedule a date and time for a Value Based Enrollment Wellness Advocate to call you back), and "Decline" (Decline the Value Based Enrollment program).
- Language selection for "English" and "Spanish".

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



END MEETING

End the Meeting in AQE

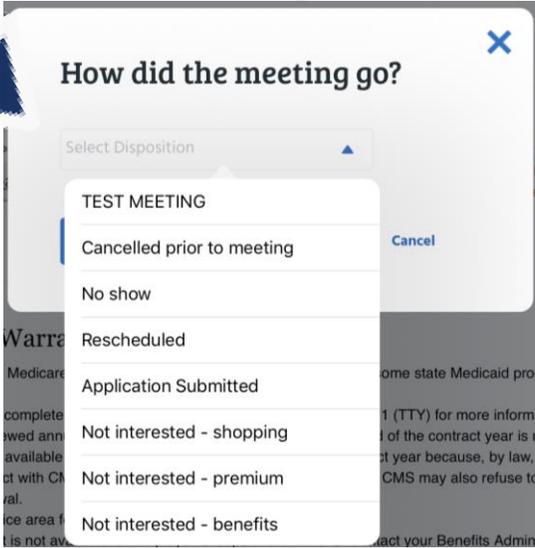


Click 'End Meeting' in the top right corner of the screen to conclude the meeting

Tap here to enter the outcome of your meeting

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

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





QUICK QUOTES

Send Quote (Quick Quote)



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

2020 Medicare Plans

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

ZIP Code: 90015 **Update**

Medicare Advantage | Prescription Drug Plan

WellCare Freedom (HMO D-SNP)
SHAUNTELLE BONMAN
\$0⁰⁰/month

Plan Covers

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

In-Network Copay

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

WellCare
Beyond Healthcare. A Better You.

Apply Now | **View Details**

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

Send Quote

Beneficiary First Name •

Beneficiary Last Name •

Email Addresses (maximum of two) •

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

Beneficiary Phone •

Application Only - Select 1 Plan

Text Verification Code - Select 1+ Plans

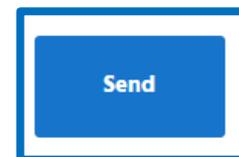
Email Verification Code - Select 1+ Plans

Medicare Advantage Centene 0 selected

Medicare Advantage 0 selected

Prescription Drug 0 selected

Add a custom message





**SEND COMPLETED APPLICATIONS
FOR BENEFICIARY APPROVAL**

Click 'Apply Now' to Begin Application



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

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

Lead Details Health Profile ZIP Code Blue Button My Drugs My Doctor 5 Our Plans

Notes Send Quote List Compare

Resources

2021 Medicare Plans

Below are the plans that are available in ZIP Code 90015 in Los Angeles County, California:
Let's start your enrollment.

ZIP Code: Update Filter Plans

Medicare Advantage **Prescription Drug Plan**

Select for Comparison

Health Net Sapphire (HMO)

Plan Covers

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

In-Network Copay

Primary Care Physician:	\$0
Emergency Room:	\$120
Specialist:	\$0
Maximum Out-of-Pocket:	\$3,450 Annual In-Network.

\$28⁵⁰/month

Health Net[®]
MEDICARE PROGRAMS

[Provider Lookup](#)

Apply Now View Details

Fill in Application



Fill in as much prospect information as you can

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

Lead Details **Medicare Details** ✓ PCP ✓ Insurance Info ✓ Medicare Status 4 **Other Details**

[Back to Shopping](#)

WellCare Plus (HMO) \$6⁷⁰/month

Other living situations and health services

Important Questions - Please answer the following questions

Some individuals may have other drug coverage, including other private insurance, TRICARE, Federal employee health benefits coverage, VA benefits, or State pharmaceutical assistance programs. Will you have other prescription drug coverage in addition to Wellcare/Ohana/Wellcare TexanPlus Healthcare Plans? *

Yes No

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

Yes No

Are you enrolled in your State Medicaid program? *

Yes No

Do you or your spouse work?

Yes No

* Required Information

Document Preferences

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

Spanish (where available)

Chinese (where available)

Korean (where available)

Vietnamese (where available)

Tagalog (where available)

Large Print

Please contact WellCare, WellCare TexanPlus, Ohana if you need information in an accessible format or language other than what is listed above at 1-866-527-0056. Our office hours are between October 1 and March 31, representatives are available Monday – Sunday, 8 a.m. to 8 p.m. Between April 1 and September 30, representatives are available Monday – Friday, 8 a.m. to 8 p.m. TTY users should call 711.

[Back](#) [Next](#)

Click "Send for Signature"



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

The screenshot shows the Ascend software interface for a user named Jane Doe. The interface includes a navigation bar with 'Medicare Details', 'PCP', 'Insurance Info', 'Medicare Status', and 'Other Details'. The main content area is titled 'WellCare Plus (HMO)' with a price of '\$6⁷⁰/month'. Below this is a section titled 'Other living situations and health services'. This section contains two sub-sections: 'Important Questions - Please answer the following questions' and 'Document Preferences'. The 'Important Questions' section includes four questions with radio button options for 'Yes' and 'No': 'Some individuals may have other drug coverage...', 'Are you a resident in a long-term care facility...', 'Are you enrolled in your State Medicaid program?', and 'Do you or your spouse work?'. The 'Document Preferences' section includes a checkbox for 'Please check the box below if you would prefer us to send you information in a language other than English or in an accessible format:' and several language options: Spanish, Chinese, Korean, Vietnamese, Tagalog, and Large Print. At the bottom of the form, there are buttons for 'Back', 'Next', 'Save', and 'Send for signature'. A large blue arrow points to the 'Send for signature' button.

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

Complete Required Fields & Click Send



Send Partial Application for Signature

Beneficiary First Name •

Harper

Beneficiary Last Name •

Test

Email Addresses (maximum of two) •

Email Addresses (maximum of two)

Beneficiary Phone •

Beneficiary Phone

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

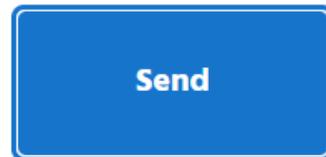
Send ←

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

Immediate Verification



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



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

Emails Received by Prospect with Verification Code



Email #1

Madisson Bettegnies wants to share health insurance options.

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

Reply Reply All Forward

Wed 6/3/2020 10:39 AM

Greetings Harper Test,

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

CLICK TO RESUME

Madisson Bettegnies

Centene - Managed Health Services - Indiana

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

mbettegnies@bloominsuranceagency.com

You received this email upon request.

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

Email #2

Madisson Bettegnies wants to share health insurance options.

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

Reply Reply All Forward

10:39 AM

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

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

109492096

Prospect Steps – Enter Verification Code



Type Size



Verification

Verification Code ←

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

Prospect Steps – Review Entered Information



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

[Back to Shopping](#)

WellCare Plus (HMO) **\$6⁷⁰/month**

Tell us about yourself

Personal Information

ATTENTION: You are beginning your application for enrollment. This application is for people with Medicare who want to join a Medicare Advantage Plan or Prescription Drug Plan. To join a plan you must be a United States citizen or be lawfully present in the U.S. and live in the plan's service area.

Prefix:

First Name: * Middle Initial:

Last Name: * Gender: * Male Female

Your Birthday: * mm/dd/yyyy Email: you@example.com

Phone: * 8888888888 Mobile Phone: 8888888888

Please know that by providing your email address, you are agreeing to receive emails from us. We will give you the opportunity to opt in and you may always opt out of future email communications.

* Required Information

Next

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

Prospect Steps – Click Apply Now



Review & Purchase 1 Review

Review

\$ 0⁰⁰ /month

Apply Now

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

Authorization	Signature of Applicant: <i>Harper Test</i> Signature Date: <i>06/12/2020</i> I am the person listed on this enrollment form or I am simply helping to complete this enrollment form. <i>SelfEnroll</i>	Edit
Payment	Payment Method: <i>Bill</i>	Edit

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



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

Confirmation Page – Consumer VBE



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

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

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

You have completed your enrollment for WellCare Dividend Prime (HMO)

Please keep this Confirmation Number for your records: **4010224**



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



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

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

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



Start Transitioning to Your New Plan Now!
Wellness Advocates are standing by to help you transition to your new plan. They will schedule your Annual Wellness Visit and gather important information related to your healthcare needs.

Select your preferred language for the call:
 English Spanish



Call Me Now
Have a Wellness Advocate call you now.



Schedule a Call
Set a date/time to speak with a Wellness Advocate.



Decline
Decline to speak with a wellness Advocate.



AGENT PORTAL

Agent Portal



mbettegnies

Home

Agent Portal

Saved Applications

Agent Credit URL

Log Off

Type Size

A



A

Tracking

Enrollments

Value Based Enrollments

Quick Quotes

Search for an enrollee



Select Fields

Select

Name	Address	Plan	Plan Year	Date	Premium	Confirmation #	VBI
Harper Test	240 Venice Boulevard, Los Angeles, Los Angeles, CA, 90015	WellCare Best (HMO)	2020	06/05/2020	\$0.00	405	

Toggle to the VBE tab to view information regarding past VBEs

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

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

Agent Credit URL/Personal URLs



- Each Agent will have a Personal URL (PURL) to use to connect prospects with the online enrollment tool if they are not doing a face-to-face meeting with Ascend
- The PURL can be found in the Agent Portal and accessed with your same Ascend credentials
 - Visit the Agent Portal tile on your Home screen
 - Click on 'Agent Credit URL'
- Your PURL is unique to you and is created on your first login to Ascend
- 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



Health Profile

1 ZIP Code

2 Blue Button

3

Agent Credit URL

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

<https://wellcare.isf.io/2023?AgentCreditCr> [Copy URL](#)

Explore Plans

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

Your ZIP Code

[Get Started](#)

[View Our Plans](#)



SAVED APPLICATIONS

Saved Applications



mbettegnies

[Home](#)

[Agent Portal](#)

[Saved Applications](#)

[Agent Credit URL](#) ▾

[Log Off](#)

Type Size



Applications In Progress

Enrollee	Address	Plan	Plan Year	Last Edit	Actions
Harper Jo	CA 90015	WellCare Best (HMO)	2020	06/12/2020 12:07:18 PM	Edit Delete

You can edit or delete the application here

On this screen, you can view saved enrollments.

Note: Saved Applications will only last for 7 days.

Steps for Completing a Saved Application





OFFLINE APPLICATIONS

Selecting a Lead



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

The screenshot shows the Ascend Home screen for user Madison Bettegnies. The user is marked as 'Unavailable' and 'Not Accepting Calls'. A yellow warning box at the top indicates the user is 'Offline' because their internet connection is down. Below this, a section titled 'What would you like to do today?' offers several 'Agent Portal' links for different states: AR, CA, FL, GA, IL, IN, KS, LA, and MO. At the bottom, a 'New Leads' table is highlighted with a blue border. The table contains one lead entry for Howard Tester, generated in Los Angeles, CA, on June 8, 2020.

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

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

Start a Meeting



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

The screenshot displays the Ascend CRM interface for a lead named 'Tester, Howard'. The interface includes a sidebar with navigation icons for Home, Leads, Appointments, Recordings, Resources, and Help. The main content area shows the lead's details, including the date 'Jun 08, 2020' and 'Self Generated'. A blue box highlights the 'Start a Meeting' button in the top right corner. Below this, there are three sections: 'Appointments', 'Past Meetings', and 'Offline Enrollments', each with a table header and a message indicating no data is present for this lead.

Ascend Madison Bettegny
Unavailable Not Accepting Calls

Tester, Howard

Jun 08, 2020 Self Generated

Start a Meeting

Appointments

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

Past Meetings

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

Offline Enrollments

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

Selecting a SOA



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

Do you have a Scope of Appointment?

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

Enter Scope of Appointment ID (Optional)

Start Meeting Cancel Meeting

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

Accepting the Disclaimer



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

Recording Disclaimer

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

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

Entering the Zip Code



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

Let's get started!

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

Your current zip code is

Continue

Selecting an Enrollment Form



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

The screenshot displays the Ascend CRM interface. At the top left is the Ascend logo. To its right, a dropdown menu is open, showing the name "Howard Tester". In the top right corner, there are two buttons: "Not Recording 00:00:11" and "End Meeting". On the left side, there is a sidebar with icons for "Lead Details" and a video camera icon. The main content area has a title "Select an Enrollment form for Howard Tester" and a search bar containing the text "2020 CCP Enrollment Form". A blue rectangular box highlights the search bar.

Completing and Submitting the Application



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

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

Enrollment Form for Howard Tester

[Go Back](#)

Personal Information

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

First Name:* Middle Initial:

Last Name:* Gender:*

Birthdate:* Phone:*

Email Address:

Medical Insurance Information

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

Medicare Number:*

Hospital Part A Date:*

Medical Part B Date:*

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

Address 1:* Address 2:

City:* State:*

Zip:* County:*

Mailing Address (Only If Different Than Permanent Residence Address)

Mailing Address 1: Mailing Address 2:

Mailing City: Mailing State:

Submit

Ending the Meeting



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



Dispositioning the Meeting



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

How did the meeting go?

Select Disposition

Finish

Cancel

Returning Online



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

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

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

Confirming Lead Status



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



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



SANDBOX MODE

Signing In



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

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

Home Screen



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



Ascend in Sandbox mode. Changes made will not be saved.
Exit Sandbox

Madison Bettegnies 1
Unavailable Not Accepting Calls



Home



Leads



Appointments



Recordings



Resources



Help

Welcome Madison

New Action Items!

[View Notifications](#)

You have a new lead assigned to you!

You have a new Home Visit assigned to you!

What would you like to do today?

2020 RATE Telephonic Enrollment Script - English

[Agent Portal - AR](#)

[Agent Portal - CA](#)

[Agent Portal - FL](#)

[Agent Portal - GA](#)

[Agent Portal - IL](#)

[Agent Portal - IN](#)

[Agent Portal - KS](#)

[Agent Portal - LA](#)

[Agent Portal - MO](#)

[Agent Portal - MS](#)

[Agent Portal - NM](#)

[Agent Portal - OH](#)

[Agent Portal - OR](#)

[Agent Portal - PA](#)

[Agent Portal - SC](#)

[Agent Portal - TX](#)

[Agent Portal - WI](#)

[Broker Portal](#)

[Arizona Quick Quote](#)

[Ascension Florida Quick Quote](#)

[Ascension Kansas Quick Quote](#)

[California Quick Quote](#)

[Florida Quick Quote](#)

[Georgia Quick Quote](#)



AGENT VIRTUAL MEETING – ASCEND VIDEO

Agent Virtual Meeting



1. Agent schedules a virtual home visit

The screenshot displays the Ascend CRM interface for a lead named Whitney Adkins. The interface includes a sidebar with navigation options: Home, Leads, Appointments, Recordings, Resources, and Help. The main content area shows the lead's name, status (New), creation date (Sep 11, 2020), and source (Self Generated). There are two buttons: 'Contact Lead' and 'Start a Meeting'. Below this, the 'Appointments' section is empty, with a message stating 'There are no appointments for this lead. Any appointments will be displayed here.' and three links: 'Create a Scope of Appointment', 'Create Home Visit', and 'Create Virtual Home Visit'. The 'Past Meetings' section is also empty, with a message stating 'No Meetings on record for this Lead. Any held meetings with this lead will show here.' The 'Offline Enrollments' section is partially visible at the bottom.

Ascend

Adkins, Whitney

New Sep 11, 2020 Self Generated

Derek Foreman
Unavailable Not Accepting Calls

Home
Leads
Appointments
Recordings
Resources
Help

Appointments

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

[Create a Scope of Appointment](#) | [Create Home Visit](#) | [Create Virtual Home Visit](#)

Past Meetings

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

Offline Enrollments

Schedule Virtual Home Visit



2. Agent selects date and time of meeting.

The screenshot shows the Ascend CRM interface for a lead named Whitney Adkins. A modal window is open for scheduling a virtual home visit. The modal displays a calendar grid with the following data:

Date	Day	Hour	Minute	Time
Tue Sep 22	3	57		
Wed Sep 23	4	58		
Thu Sep 24	5	59	AM	
Today	6	00	PM	
Sat Sep 26	7	01		
Sun Sep 27	8	02		
Mon Sep 28	9	03		

The modal also includes a 'Cancel' button and a 'Save' button. The background interface shows the lead's profile with 'Contact Lead' and 'Start a Meeting' buttons, and a sidebar with navigation options like Home, Leads, Appointments, Recordings, Resources, and Help.

Meeting is Scheduled



3. Once the meeting is scheduled it shows under the appointments list on BOTH the lead detail and Appointment screens.

The screenshot displays the Ascend CRM interface for a lead named Whitney Adkins. The interface includes a navigation sidebar on the left with icons for Home, Leads, Appointments, Recordings, Resources, and Help. The main content area shows the lead's name, status (New), date (Sep 11, 2020), and source (Self Generated). There are two buttons: 'Contact Lead' and 'Start a Meeting'. Below this, the 'Appointments' section contains a table with one entry: a Virtual Home Visit on Sep 25, 2020 at 06:00 PM. Below the table are three buttons: 'Create a Scope of Appointment', 'Create Home Visit', and 'Create Virtual Home Visit'. The 'Past Meetings' section is currently empty, with a message stating 'No Meetings on record for this Lead. Any held meetings with this lead will show here.' At the bottom, there is a section for 'Offline Enrollments'.

Ascend

Adkins, Whitney

New Sep 11, 2020 Self Generated

Derek Foreman
Unavailable Not Accepting Calls

Home
Leads
Appointments
Recordings
Resources
Help

Appointments

Meeting Type	Date	Time	
Virtual Home Visit	Sep 25, 2020	06:00 PM	>

[Create a Scope of Appointment](#) | [Create Home Visit](#) | [Create Virtual Home Visit](#)

Past Meetings

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

Offline Enrollments

Upcoming Appointments



4. The meeting now shows up in the upcoming appointments listing.

The screenshot shows the Ascend mobile application interface. At the top left is the Ascend logo. On the right, the user's name 'Derek Foreman' is displayed with a dropdown arrow, and below it, the status 'Unavailable Not Accepting Calls'. A toggle switch for 'Enable iOS Calendar Sync' is on the right. A vertical sidebar on the left contains navigation icons for Home, Leads, Appointments (highlighted in blue), Recordings, Resources, and Help. The main content area is titled 'Appointments' and features a sub-header 'Upcoming Appointments'. Below this, a date separator indicates 'Sep 25, 2020'. A single appointment entry is shown with a home icon, the time '06:03 PM', the address '1801 S Liberty Dr, Bloomington, Indiana 47401', the name 'Whitney Adkins', and the phone number '(812) 361-0478'. A right-pointing chevron is at the end of the entry. Below the appointment list, a message states: 'No future seminars found. Any future seminars assigned to you will be displayed here.'

Appointment Details



5. Selecting the appointment will show the details.

The screenshot shows the Ascend mobile application interface. At the top, the user's name is Derek Foreman, with status indicators for 'Unavailable' and 'Not Accepting Calls'. A sidebar on the left contains navigation icons for Home, Leads, Appointments, Recordings, Resources, and Help. The main content area is titled 'Appointments' and features a modal window for a specific appointment: 'Home Visit with Whitney Adkins'. The modal includes a 'Start Meeting' button, a calendar icon indicating the date 'September 25' at '06:03 PM', a location pin icon for '1801 S Liberty Dr, Bloomington, Indiana. 47401', and a phone icon for 'Contact (812) 361-0478'. A map from Apple Maps shows the location. At the bottom of the modal, there are buttons for 'Go To Lead', 'Add Existing Scope', 'Cancel Appointment', and 'Get Directions'.

Meeting Controls



6. The agent can text or email beneficiary the meeting details.

The screenshot displays the Ascend CRM interface. At the top left is the Ascend logo. The top right shows the user's name, 'Derek Foreman', and status 'Unavailable Not Accepting Calls'. A left sidebar contains navigation icons for Home, Leads, Appointments, Recordings, Resources, and Help. The main content area is for a lead named 'Adkins, Whitney', with buttons for 'Contact Lead' and 'Start a Meeting'. A modal window is open, titled 'Virtual Home Visit with Whitney Adkins'. It shows a calendar icon for 'September 25' at '06:00 PM'. Below the date are three options: 'Send Email Invite', 'Send Text Invite', and 'Start Meeting'. At the bottom of the modal are 'Cancel Appointment' and 'Done' buttons. The background shows a table for 'Appointments' with columns for 'Meeting Type' and 'Virtual Home Visit', and a 'Past Meetings' section with columns for 'Date' and 'Time'.

Agent Starts Virtual Meeting



7. Agent starts the meeting. Agent is shown a preview of their video and waits for the beneficiary to join.

The screenshot displays the Ascend CRM interface for a lead named Whitney Adkins. The interface includes a sidebar with navigation options: Home, Leads, Appointments, Recordings, Resources, and Help. The main content area shows the lead's details, including a 'Contact Lead' button and a 'Start a Meeting' button. Below this, there is a section for 'Appointments' with a table listing a past appointment. Below the appointments table are three buttons: 'Create a Scope of Appointment', 'Create Home Visit', and 'Create Virtual Home Visit'. There is also a 'Past Meetings' section with a table that currently shows no meetings on record. A video preview window is visible on the right side of the appointments table, showing a small video feed of the agent.

Ascend

Adkins, Whitney

New Sep 25, 2020 Self Generated

[Contact Lead](#) [Start a Meeting](#)

Appointments

Meeting Type	Date	Time
Past		
Virtual Home Visit	Sep 25, 2020	06:00 PM

[Create a Scope of Appointment](#) | [Create Home Visit](#) | [Create Virtual Home Visit](#)

Past Meetings

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

Offline Enrollments

Agent Meeting Controls



8. Touching the video screen shows common controls for the meeting such as *mute*, *stop video*, *hang-up*.

The screenshot displays the Ascend CRM interface. At the top left is the Ascend logo. On the right, the user's name 'Derek Foreman' is shown with a status of 'Unavailable' and 'Not Accepting Calls'. A sidebar on the left contains navigation icons for Home, Leads, Appointments, Recordings, Resources, and Help. The main content area is for a lead named 'Adkins, Whitney', with buttons for 'Contact Lead' and 'Start a Meeting'. Below this, there are tabs for 'New', 'Sep 25, 2020', and 'Self Generated'. The 'Appointments' section shows a table with columns for Meeting Type, Date, and Time. A 'Past' appointment is listed: 'Virtual Home Visit' on 'Sep 25, 2020' at '06:00 PM'. Below the table are three buttons: 'Create a Scope of Appointment', 'Create Home Visit', and 'Create Virtual Home Visit'. The 'Past Meetings' section has columns for Date, Time, Held By, and Status, with a message: 'No Meetings on record for this Lead. Any held meetings with this lead will show here.' At the bottom, there is a section for 'Offline Enrollments'. A video call window is overlaid on the right side of the appointments table, showing a small video feed and three control buttons: 'Mute', 'Stop Video', and 'Hangup'.

Beneficiary Start Screen

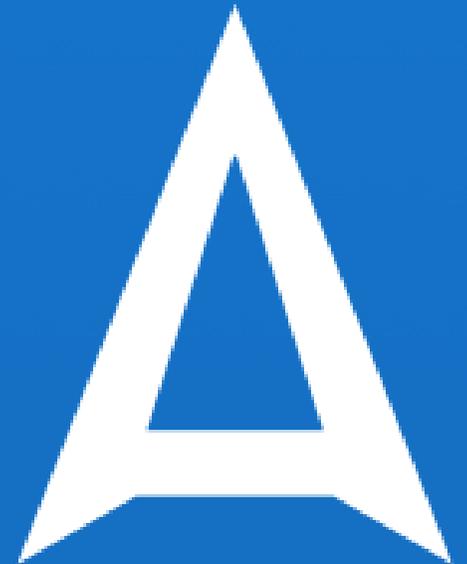
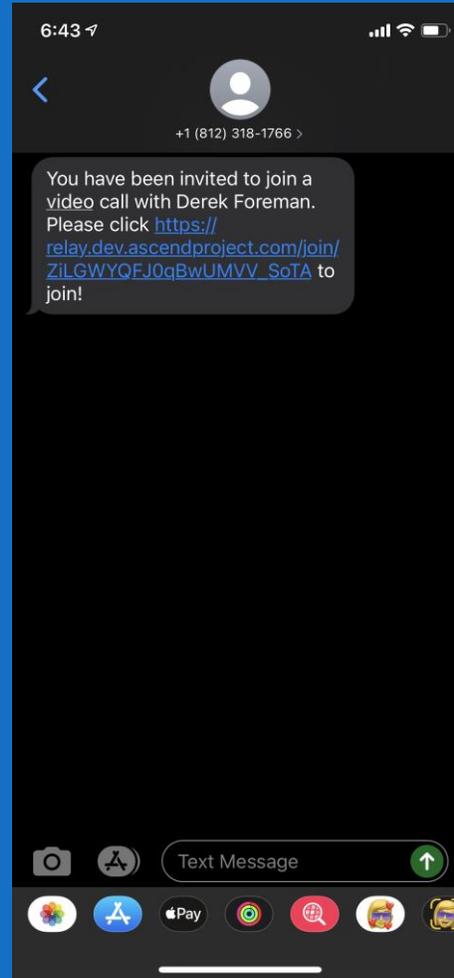


- The beneficiary can click link from their email or text and the meeting ID will be automatically entered and the beneficiary will not see this screen. If they manually open a browser to the website, this is shown.



Welcome, please enter meeting code to join!

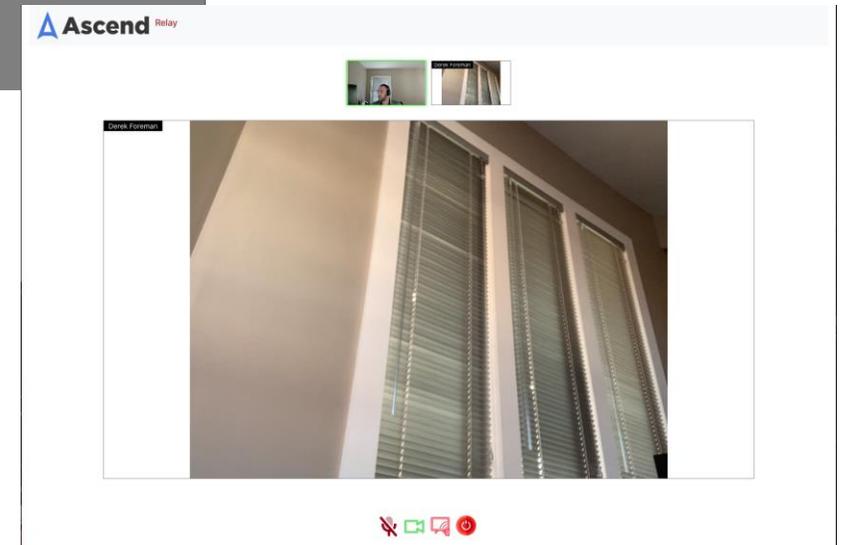
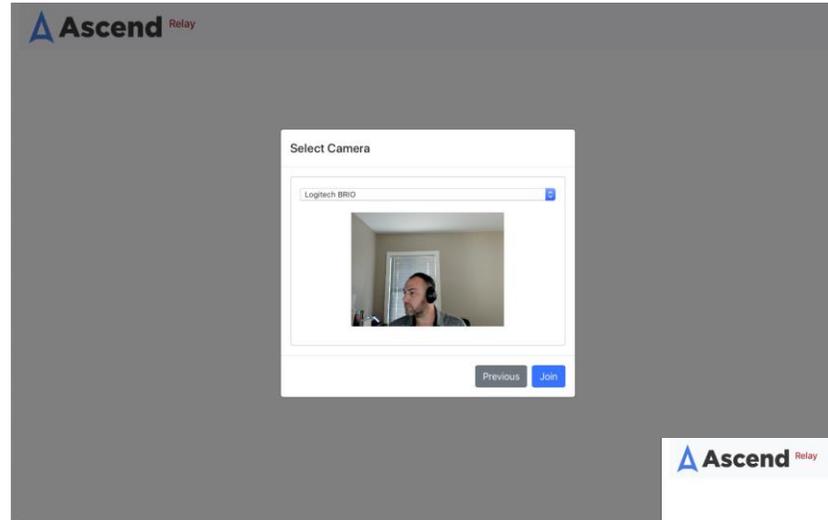
Beneficiary Text Invitation



Beneficiary Joining



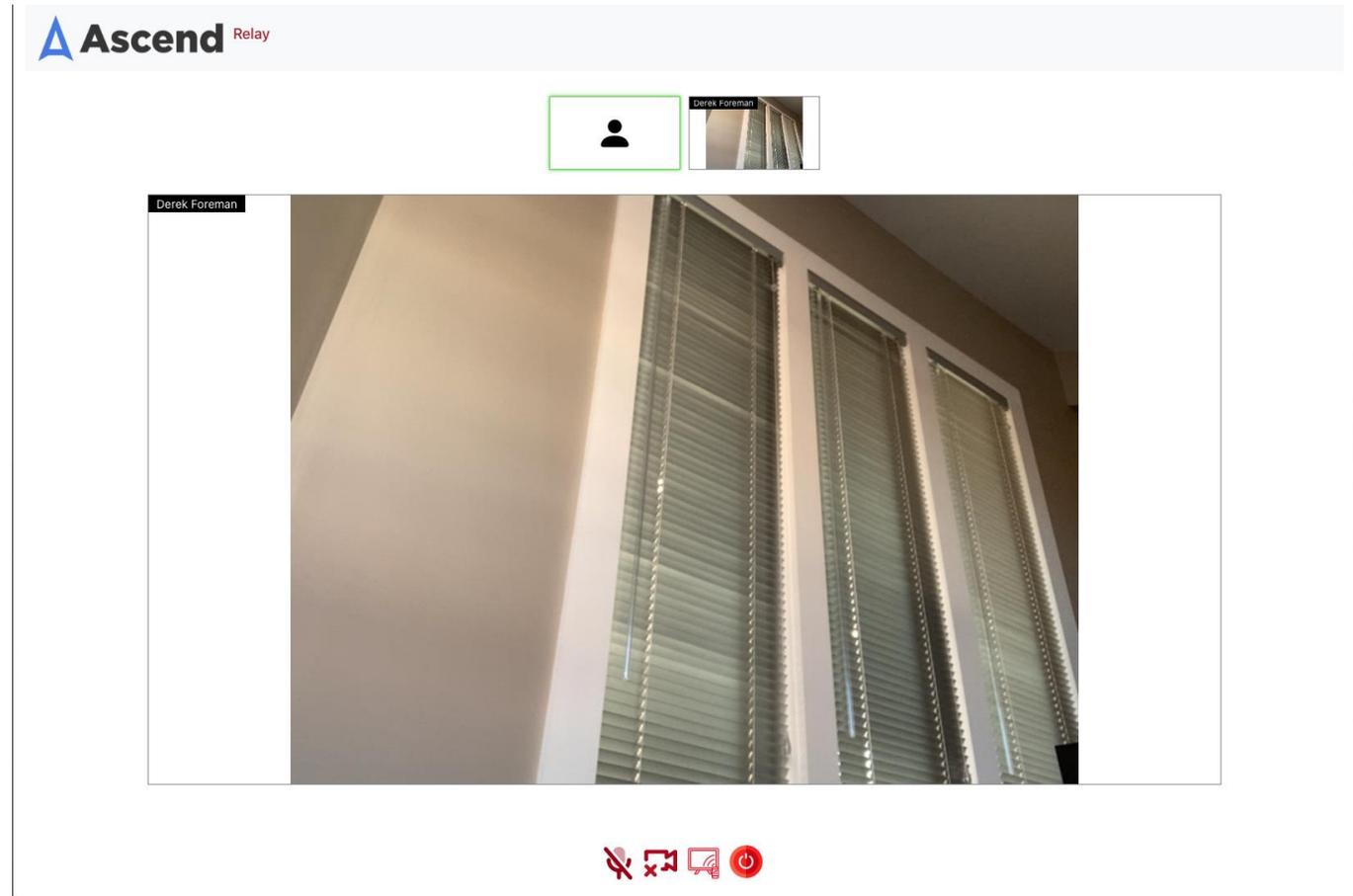
- When joining meeting, Beneficiary selects camera and microphone to allow Ascend access.



Beneficiary Stopping Video



- Beneficiary can stop, start video mute and share their desktop (browser dependent)



Agent Viewing Shared Screen



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

2021 Medicare Plans

Below are the plans that are available in ZIP Code 33101 in Miami-Dade County, Florida.

ZIP Code: 33101

Select for Comparison

WellCare Dividend (HMO)

Plan Covers: Dental, Vision, Hearing, Rx

In-Network Copay: Primary Care Physician: \$0, Emergency Room: \$120, Specialist: \$0, Maximum Out-of-Pocket: \$6000 Annual In-Network.

Select for Comparison

WellCare Premier (PPO)

Plan Covers: Dental, Vision, Hearing, Rx

In-Network Copay: Primary Care Physician: \$0, Emergency Room: \$120, Specialist: \$25, Maximum Out-of-Pocket: \$1,400 Annual In-Network, \$1,100 Combined In and Out-of-Network.

Derek Foreman

ing Calls

Offline Enrollments

Beneficiary Viewing Agent Video



Ascend Relay

Derek Foreman

Derek Foreman

Derek Foreman



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SIGNING OUT

Sign Out of AMA



The screenshot shows the Ascend user interface. At the top left is the Ascend logo. On the left side is a navigation menu with icons for Home, Leads, Appointments, Recordings, Resources, and Help. The main content area is titled 'Welcome Madison' and features a grid of buttons for various agent portals (AR, AZ, FL, GA, LA, MO, OR, PA, SC, TX) and other resources like '2019 Allwell Sales Presentation', '2019 Health Net Presentation', 'Broker Portal', '2019 OR HN Spanish', 'Add a Resource Tutorial', and 'Switching from Enrollment URLs in Windows and iOS'. In the top right corner, the user's name 'Madison Bettegnies' is displayed with status indicators 'Unavailable' and 'Accepting Calls'. A dropdown menu is open, showing options like 'My Number: (833) 216-1117', 'Available' (toggle), 'Accepting Calls' (toggle), 'Action Items', 'Lead Alerts', 'Messages', 'Change Password', 'My Account', and 'Sign Out'. A callout box points to the 'Sign Out' option with the text 'Click here to Sign Out of AMA'. Another callout box points to the dropdown arrow with the text 'Click the down arrow to bring up the dropdown menu'.

Click the down arrow to bring up the dropdown menu

Click here to Sign Out of AMA



**THANK YOU FOR ATTENDING THE
TRAINING!**