DHP's Ascend User Manual

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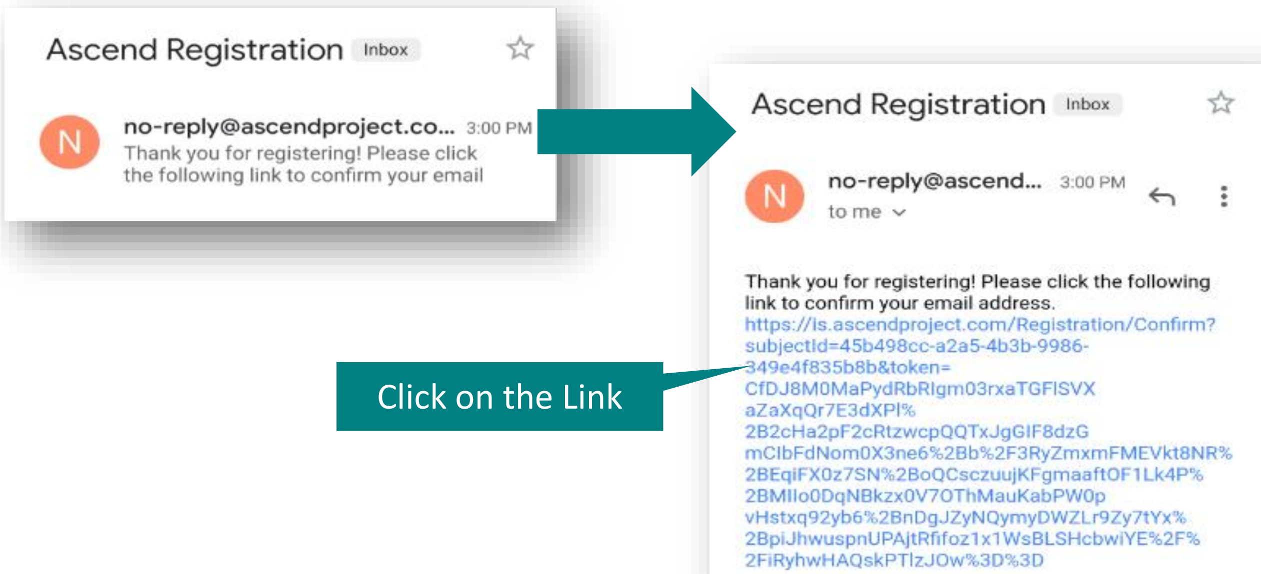
What is Ascend?

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:

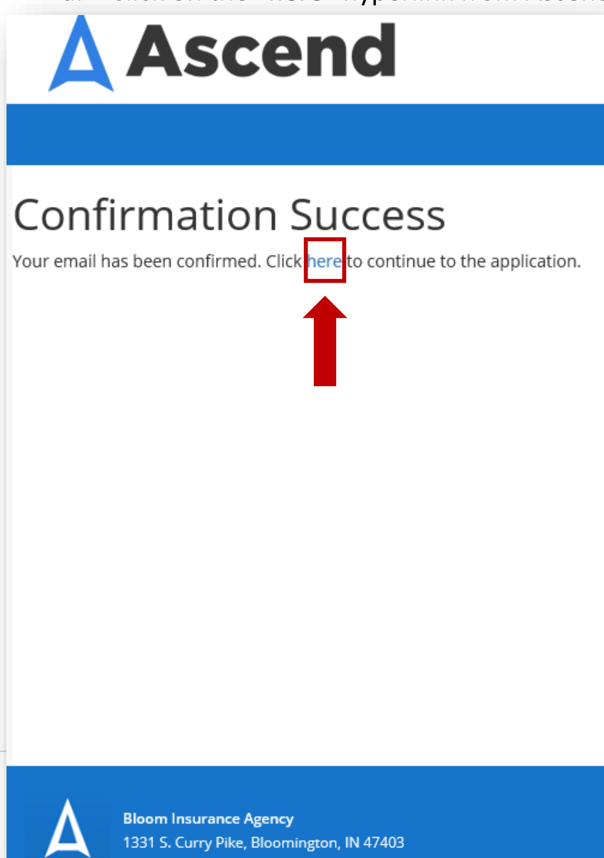
- Electronic Scope of Appointment
- Electronic application completion and submission
- Audio recording capabilities
- Replacement for paper sales support and marketing documents

Getting Started- New Ascend Users

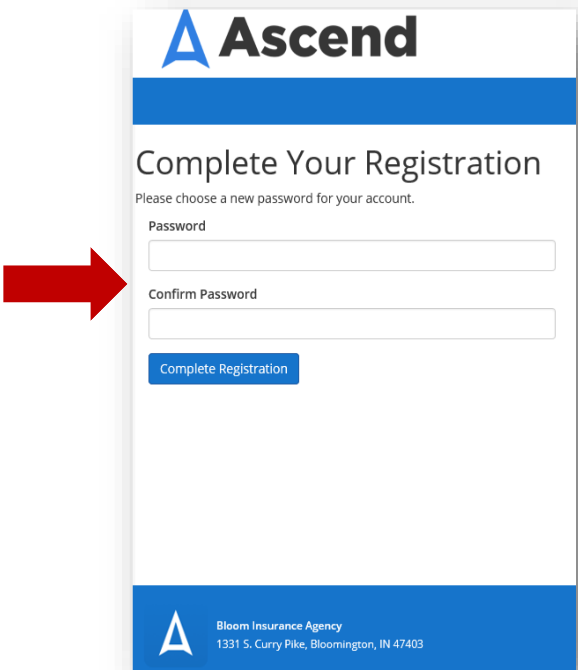
1. You will get an email from "**Ascend Registration**" letting you know that your account is ready
2. Open the email and click on the link

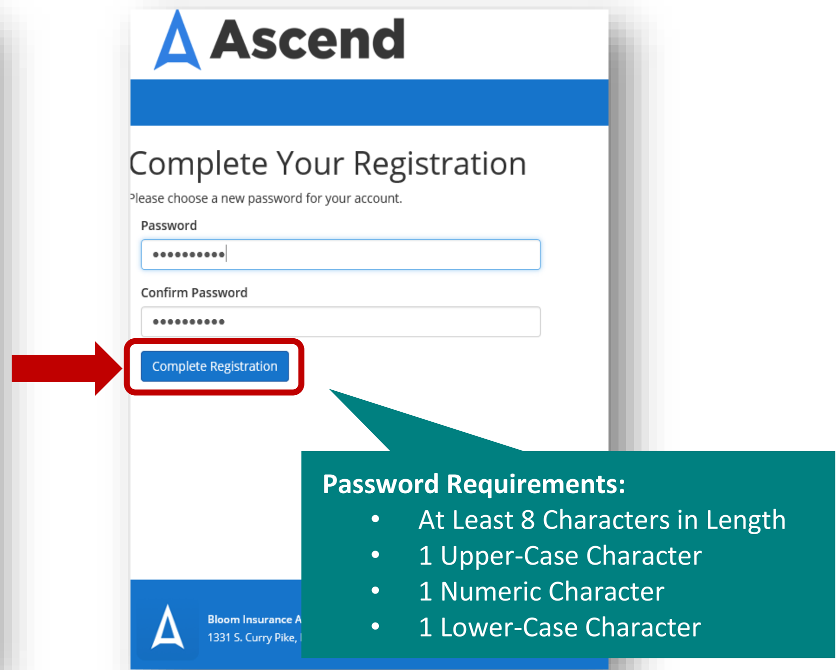


3. Confirming your Account:
   a. Click on the "**here**" hyperlink from Ascend Email



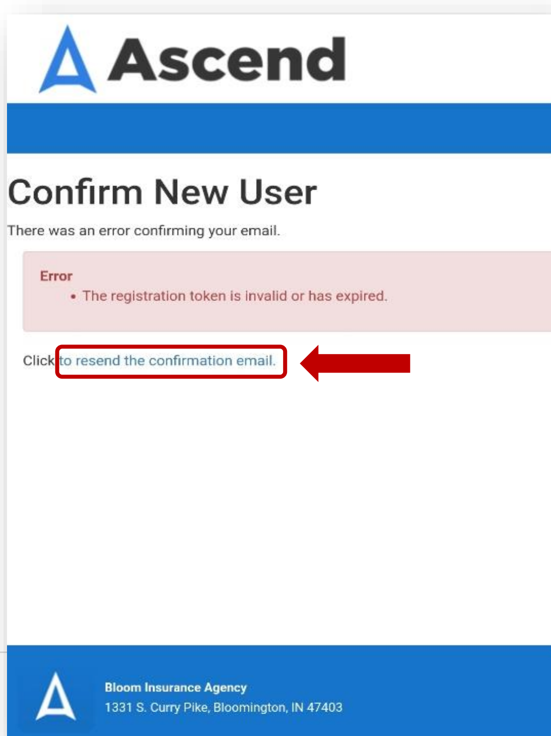
4. Next, choose your new password
   a. Password Requirements:
      - Characters in Length
      - 1 Upper-Case Character
      - 1 Numeric Character
      - 1 Lower-Case Character
5. After you have entered your password twice, click on the "**Complete Registration**" Button

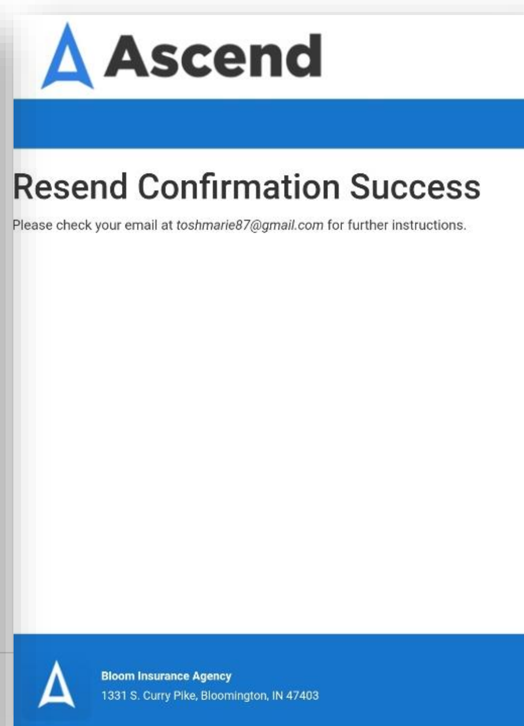




Registration Token is Expired

6. If you get an error message that your registration token is expired, click on the **"to resend the confirmation email**" hyperlink
7. Next, go back to your email to get your new confirmation link



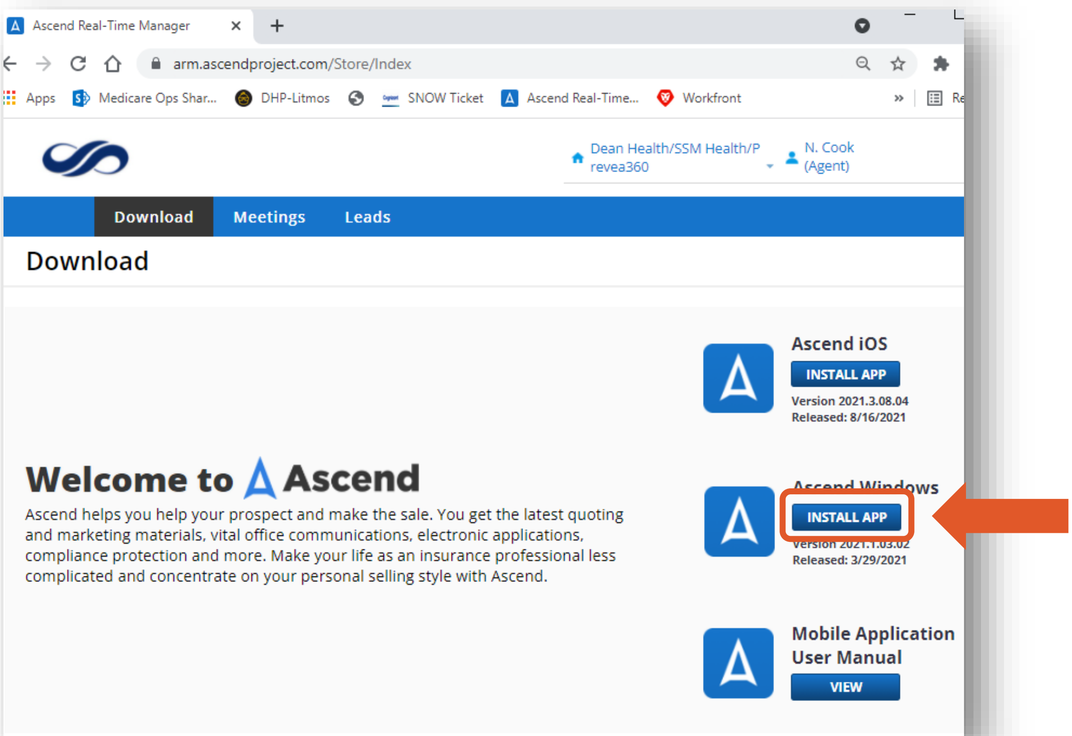


Ascend Mobile Application

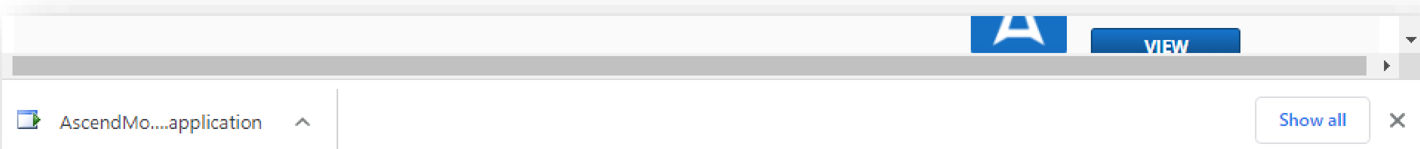
The **Ascend Mobile Application** (AMA) is the sales and enrollment platform that can be housed on your iOS, Android, Windows device. There is where you can send a electronic scope of appointment, conduct and record your sales meetings, and take a telephonic recorded application. You can also manage your Book of Business and track your lead/prospect information. Lastly, where you can submit your electronic enrollments.

Downloading AMA (Ascend Mobile Application)

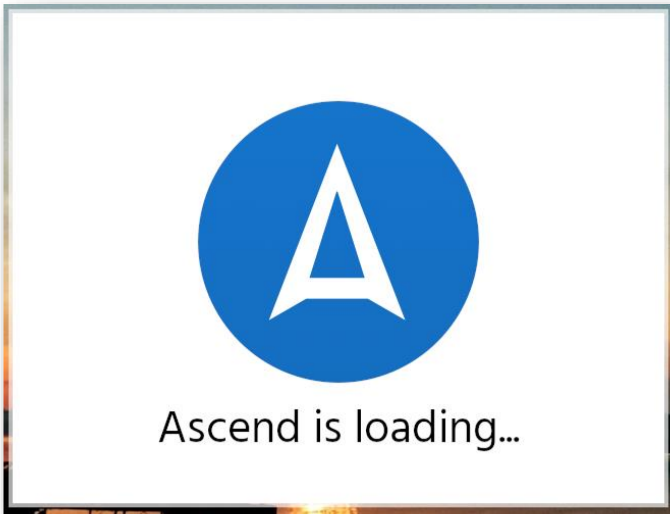
8. Go to https://arm.ascendproject.com
    a. **Note**: Screenshots shown will be for using/downloading to your Windows Desktop, but screens will be the similar if downloading to iOS or Android device
9. Click on the "**Install App**" button



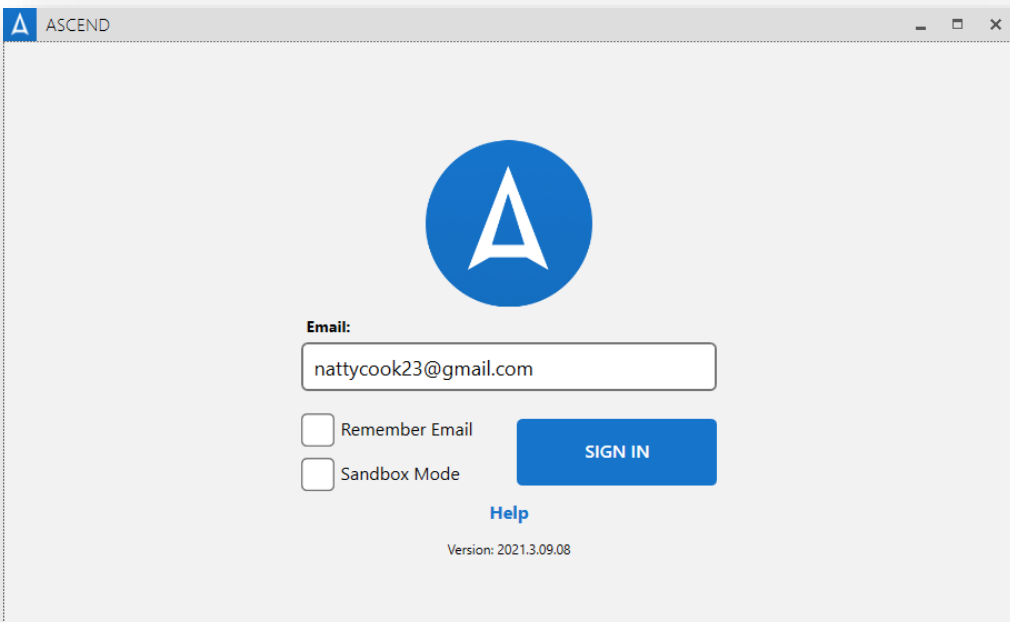
10. You may have to click on the application downloaded at the bottom of your screen:



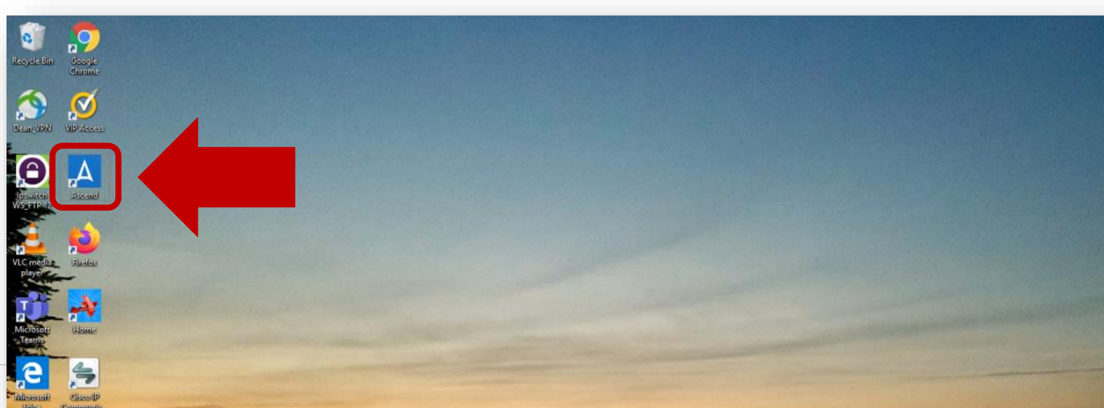
11. You will get a “loading” message



12. It will bring you to the login screen. **Note**: Your credentials are the same for all systems of Ascend

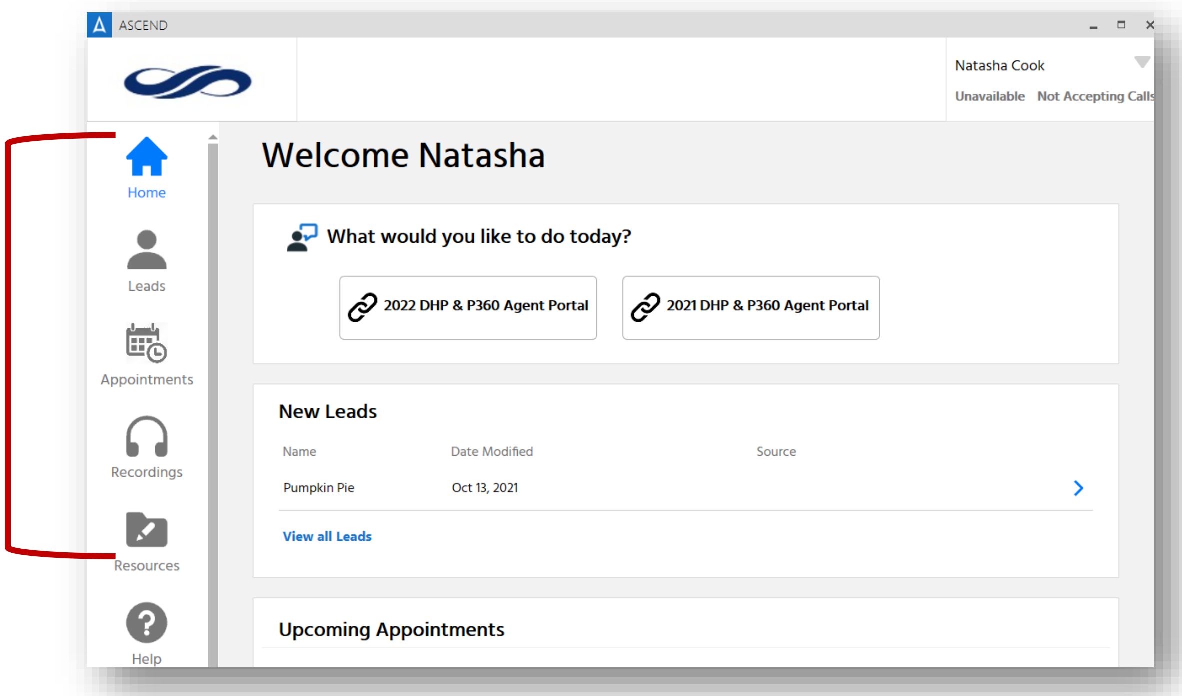


13. Ascend should also download to your desktop



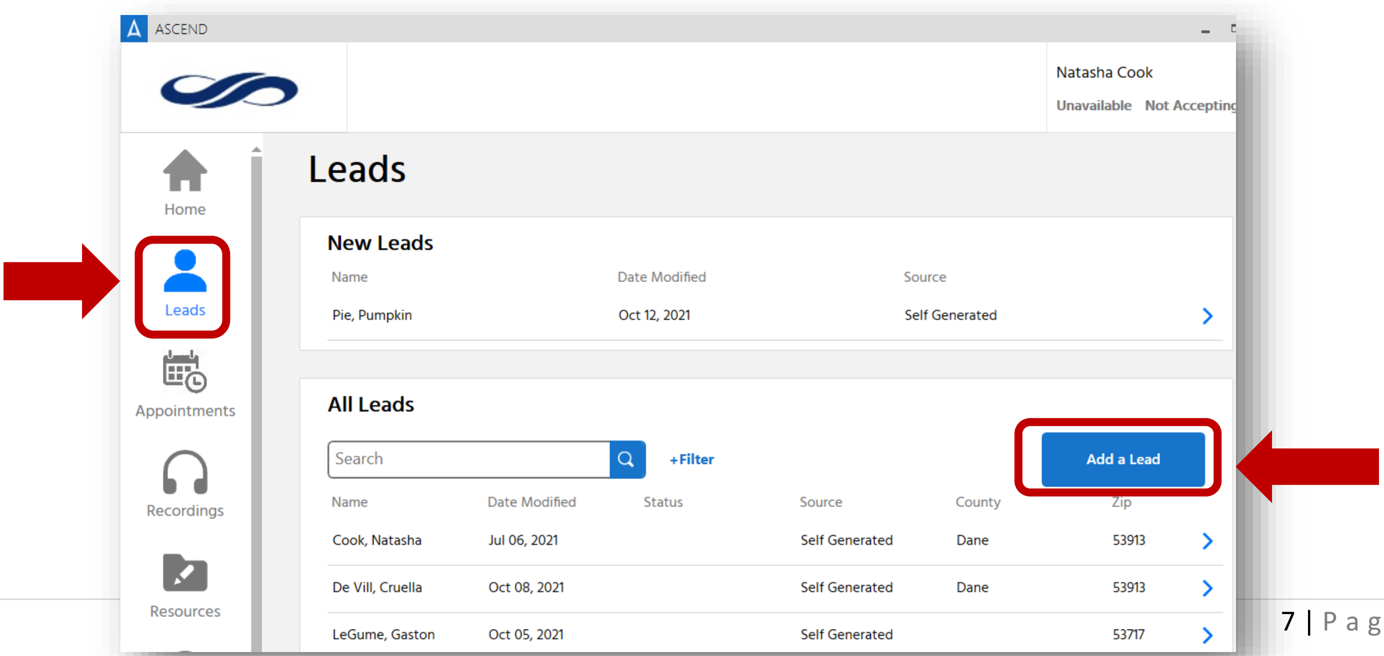
Navigating AMA

14. When you first login it will take to the "**Welcome Page**"
15. From the "**Welcome Page**" you can quickly access everything you need like view your leads, you meeting recordings and resources
    a. At this time we don't use the "**Appointments**" feature `

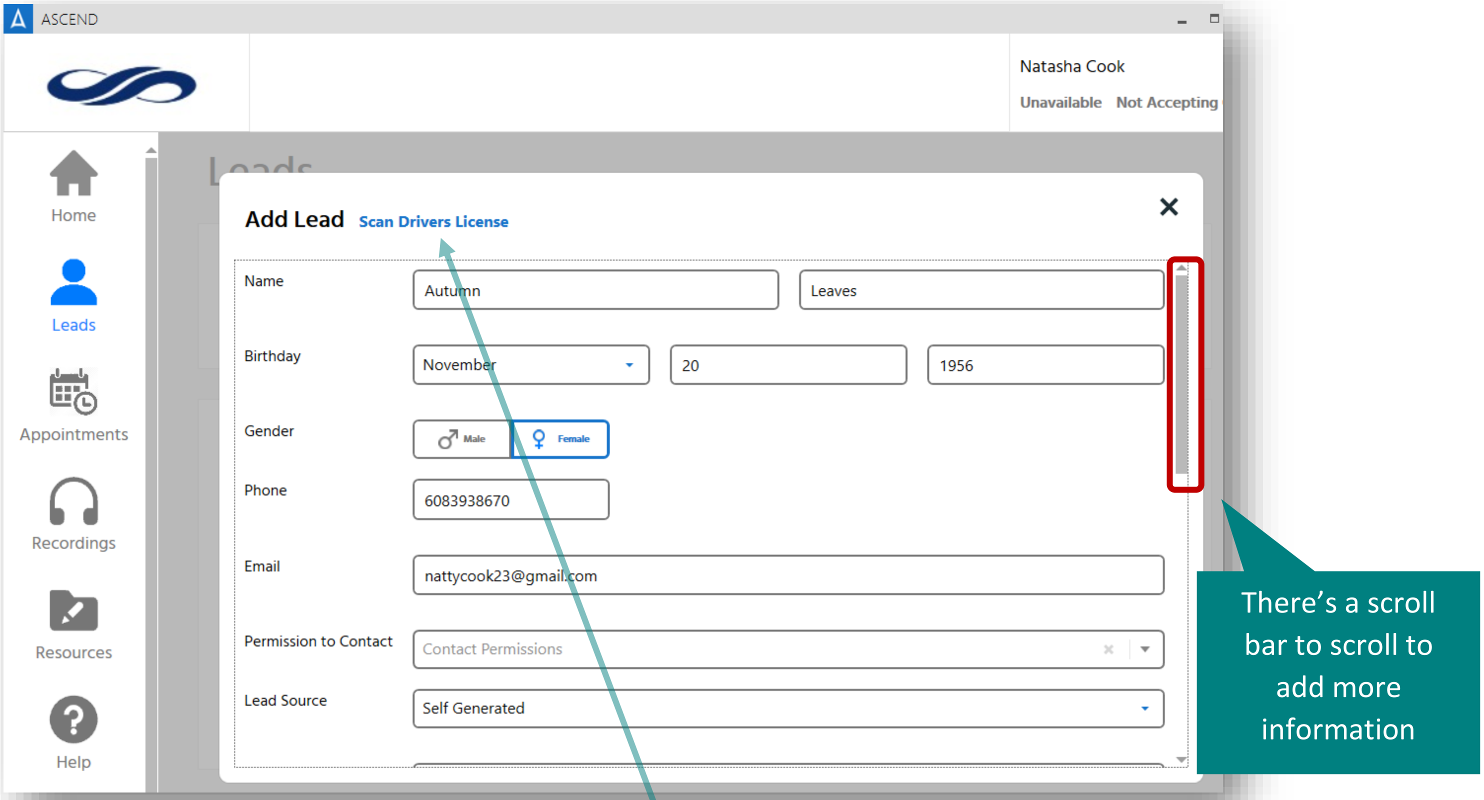


Creating a Lead

16. Click on the "**Leads**" Button
17. Then, click the "**Add a Lead**" button

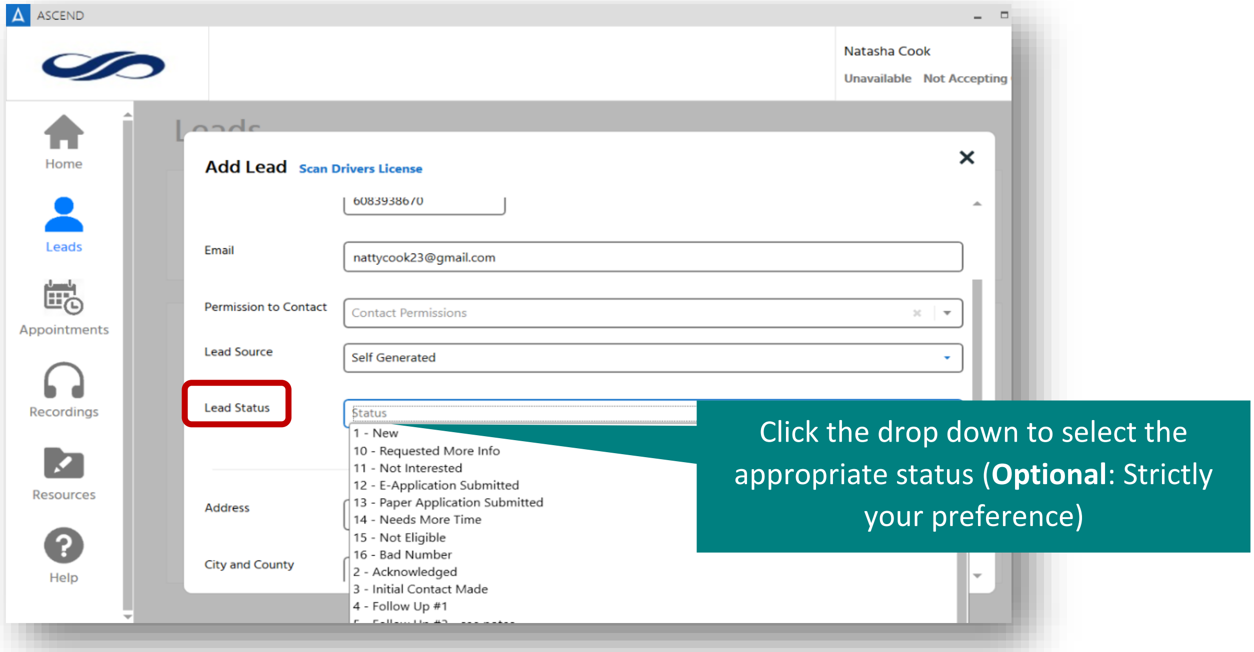


18. From here you will want to add as much information you have into the lead
    a. Everything you enter on the lead will transfer to the electronic application (If they decide to enroll)

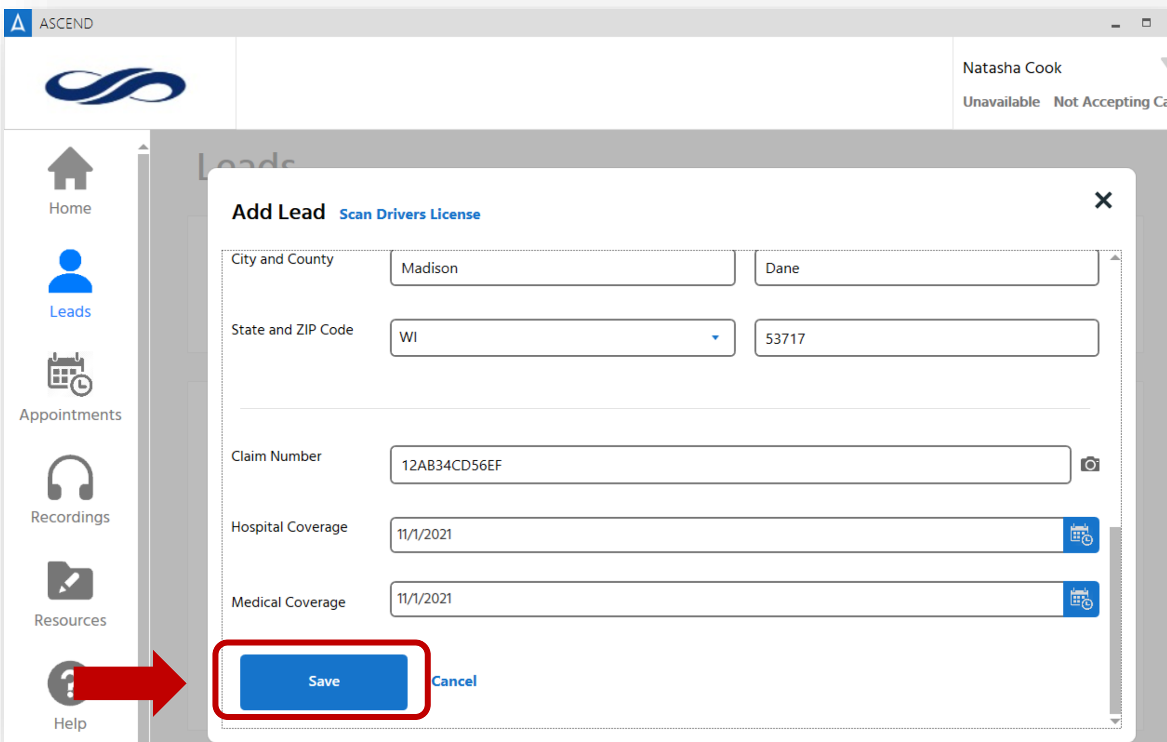


19. You can also click on the "**Scan Drivers License**" to auto-populate your clients information
    a. **Note**: I would verify that the information on their ID is still update to date
    b. Only works on iOS & Android Devices

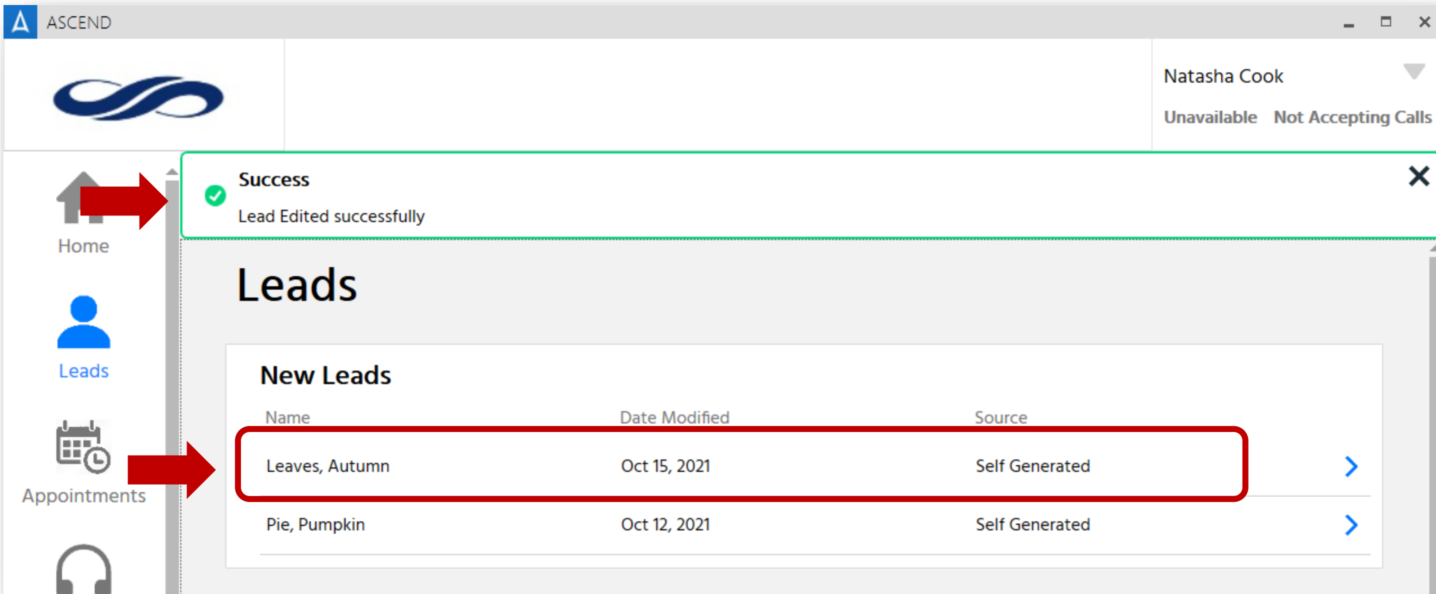
20. You can also select different Lead Statuses, so you know where you are with that Lead



21. Once you have all your information added, click on the "**Save**" button

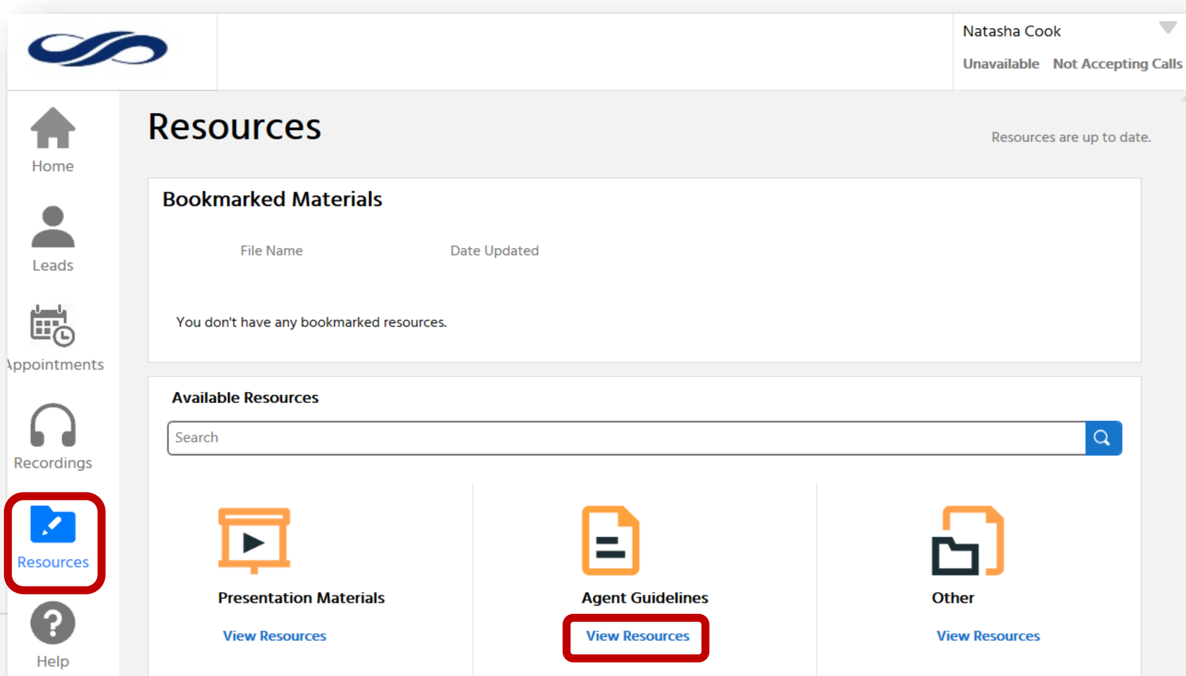


22. You will get a notification that your lead was saved successfully and You will noticed that your lead will pop up under the "**New Leads**" section

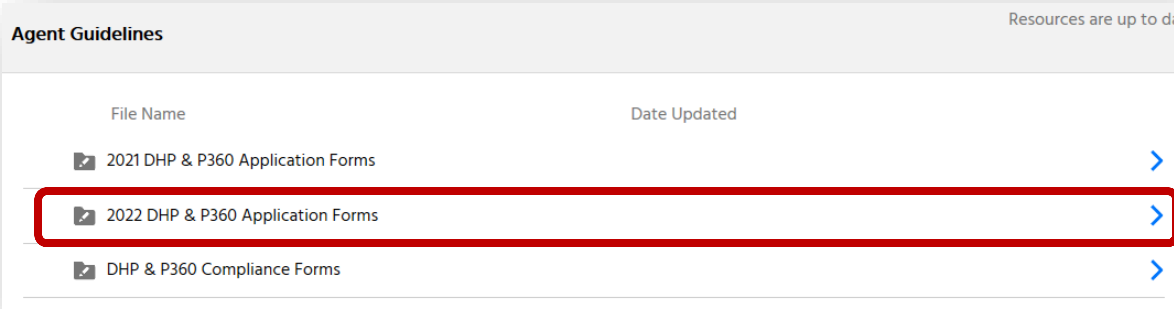


Resources

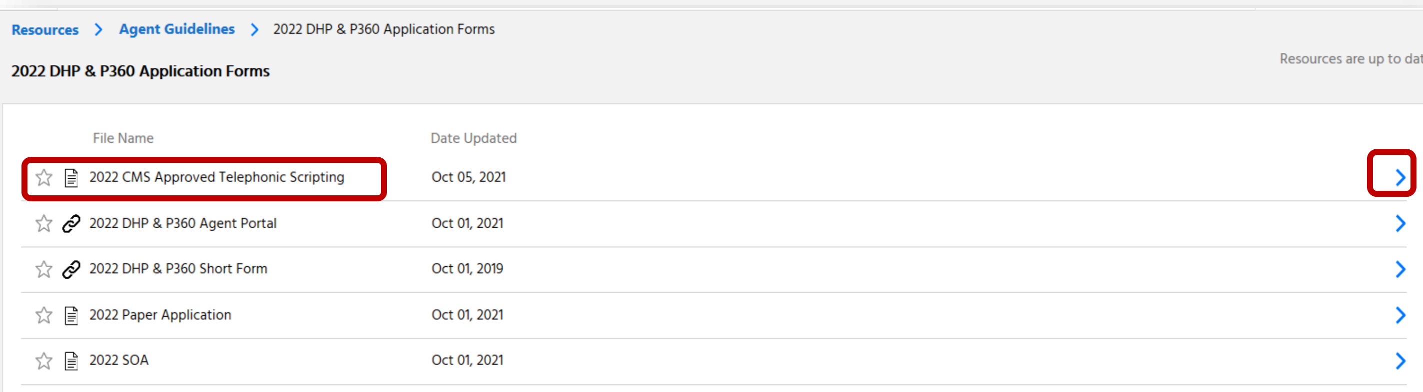
23. We have additional resources that are available in one spot so you don't have to dig around on our website or thumb through emails
24. Click on the "**Resources**" button from your Welcome/Home page
    a. There are 3 different Folders:
        i. **Presentation Materials**: Additional Benefit Link, ANOC & EOC's Links, Enrollment Guide/Summary of Benefits
        ii. **Agent Guidelines:** Telephonic Scripting, Paper Application, Short Form, and SOA
        iii. **Other:** Dental Information, Additional Benefit Flyers, Provider Directories, Formularies
25. Click on the "**View Resources**" link under each folder for which folder you want to view



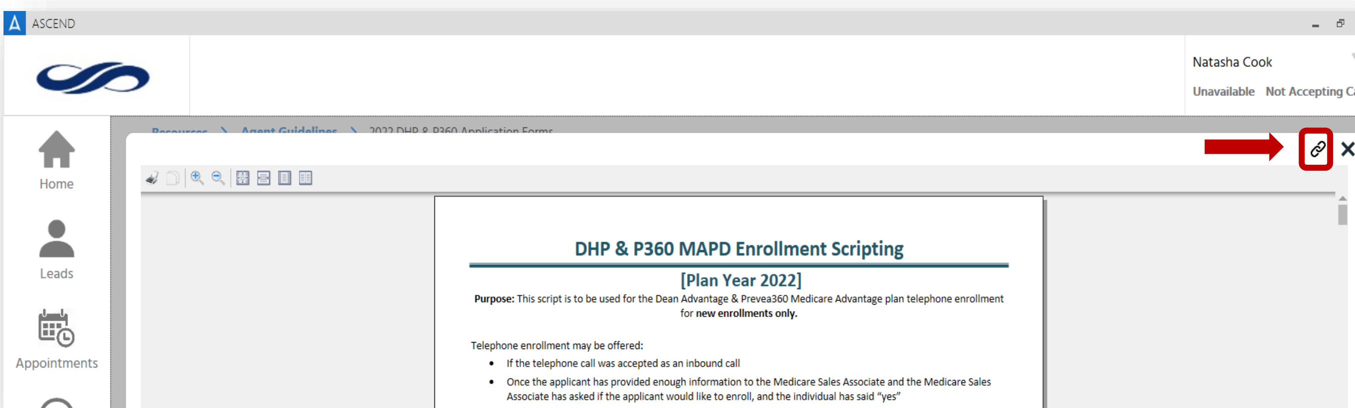
26. Click on the subfolder you want to view



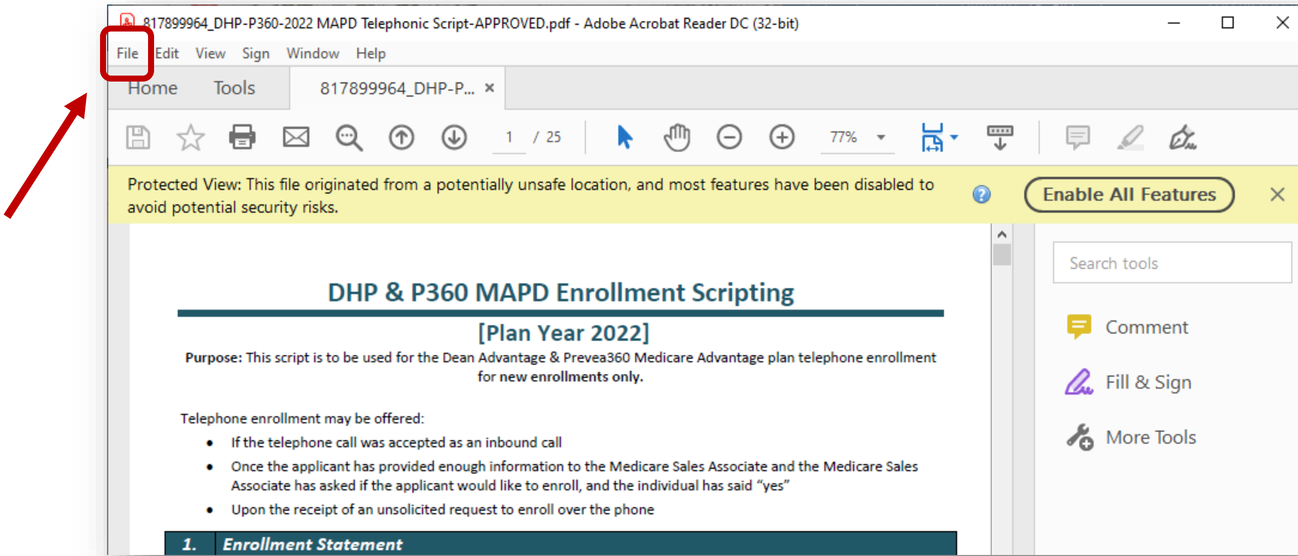
27. Click on the document you want to view by either clicking on the name of the document or the “>” arrow



28. Click on the **“link”** icon to open the document externally

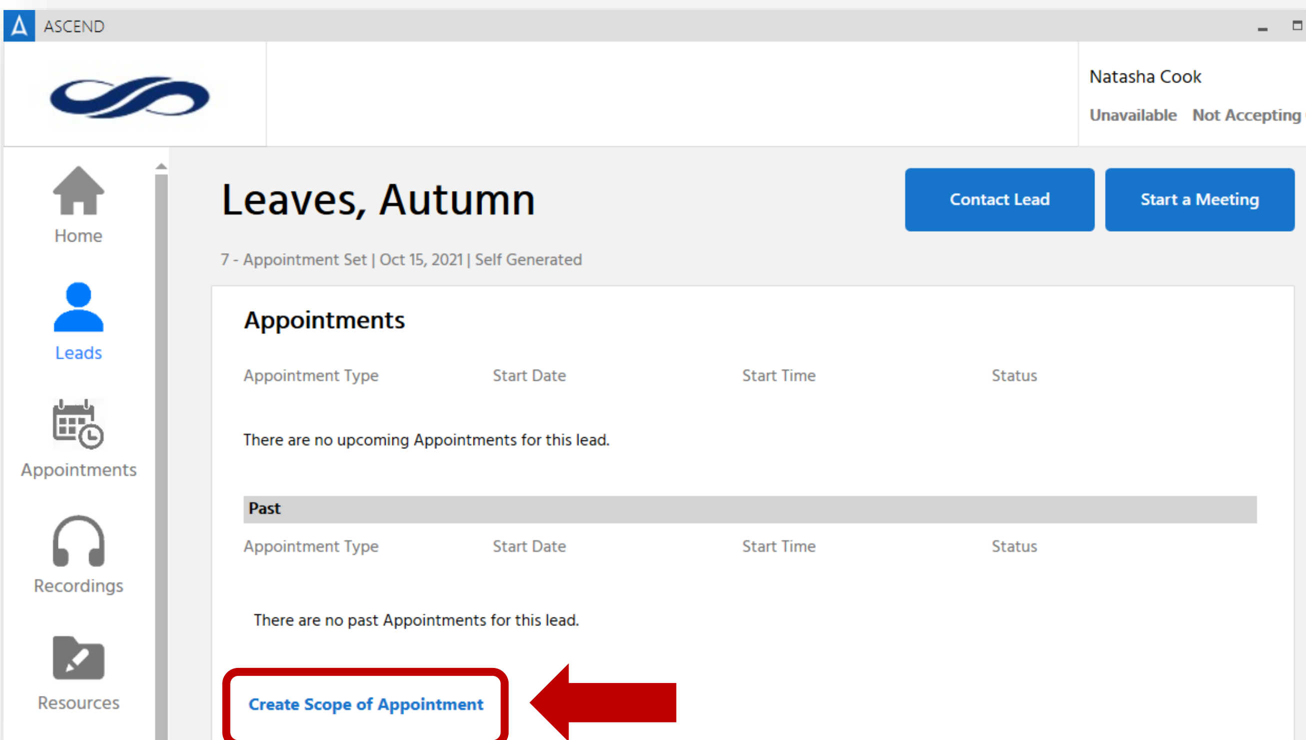


29. Next will bring up the PDF for you to save in your documents:

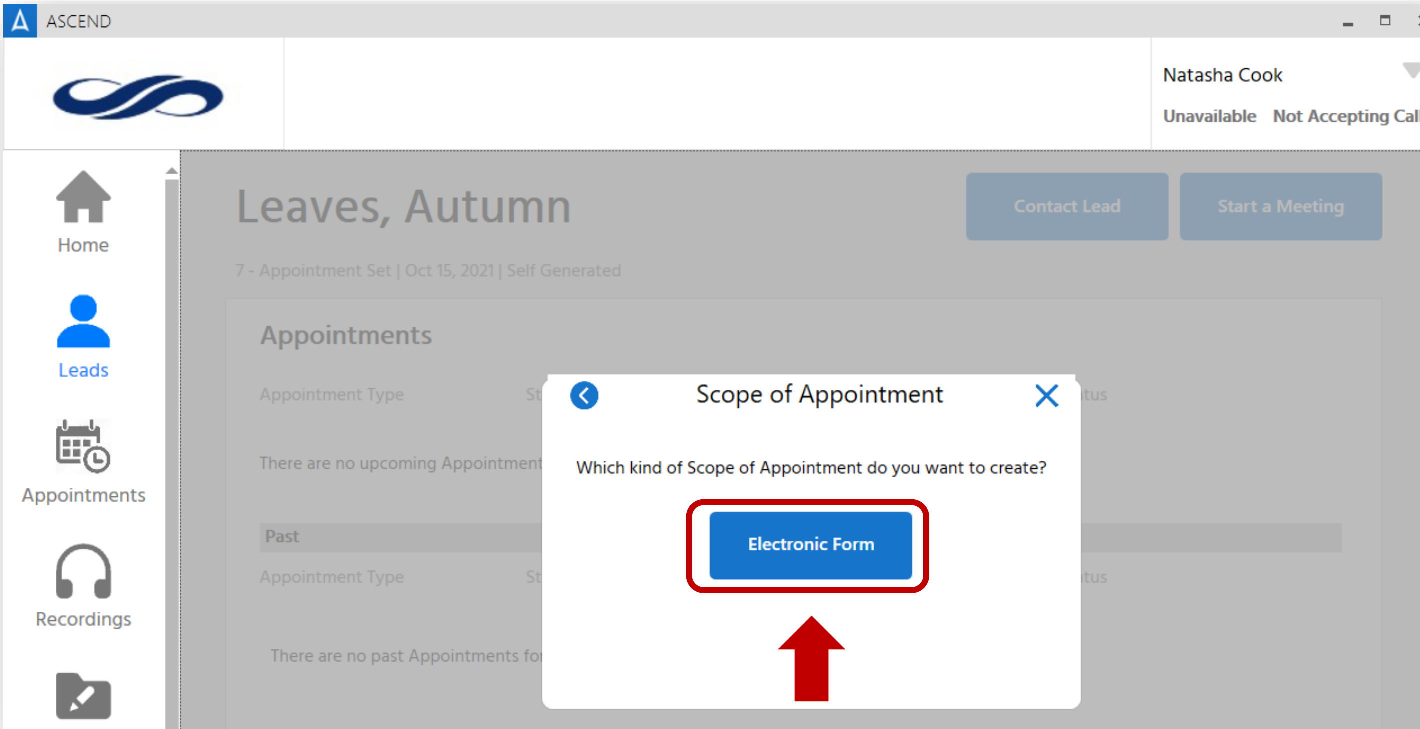


Sending an Electronic Scope of Appointment (eSOA)

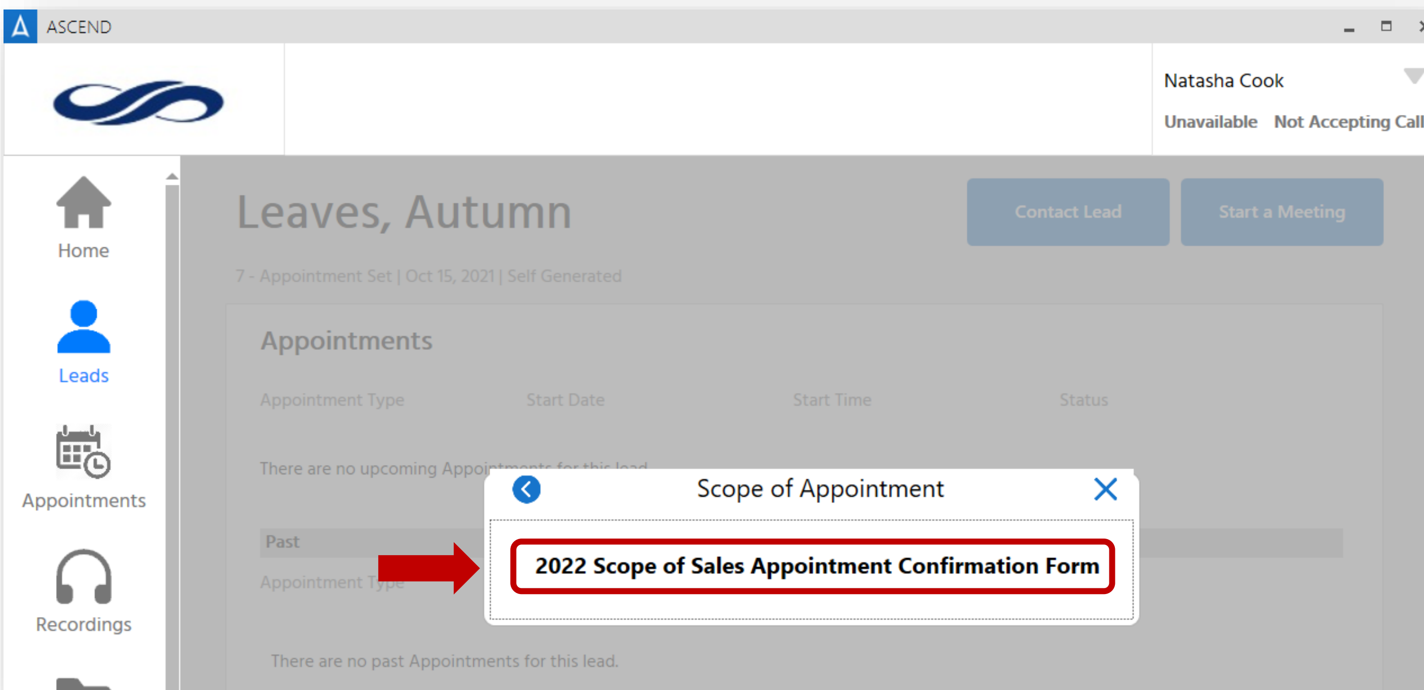
30. Click on the lead you want to send an eSOA to
31. Once you are in your lead, click on the "**Create Scope of Appointment**" hyperlink



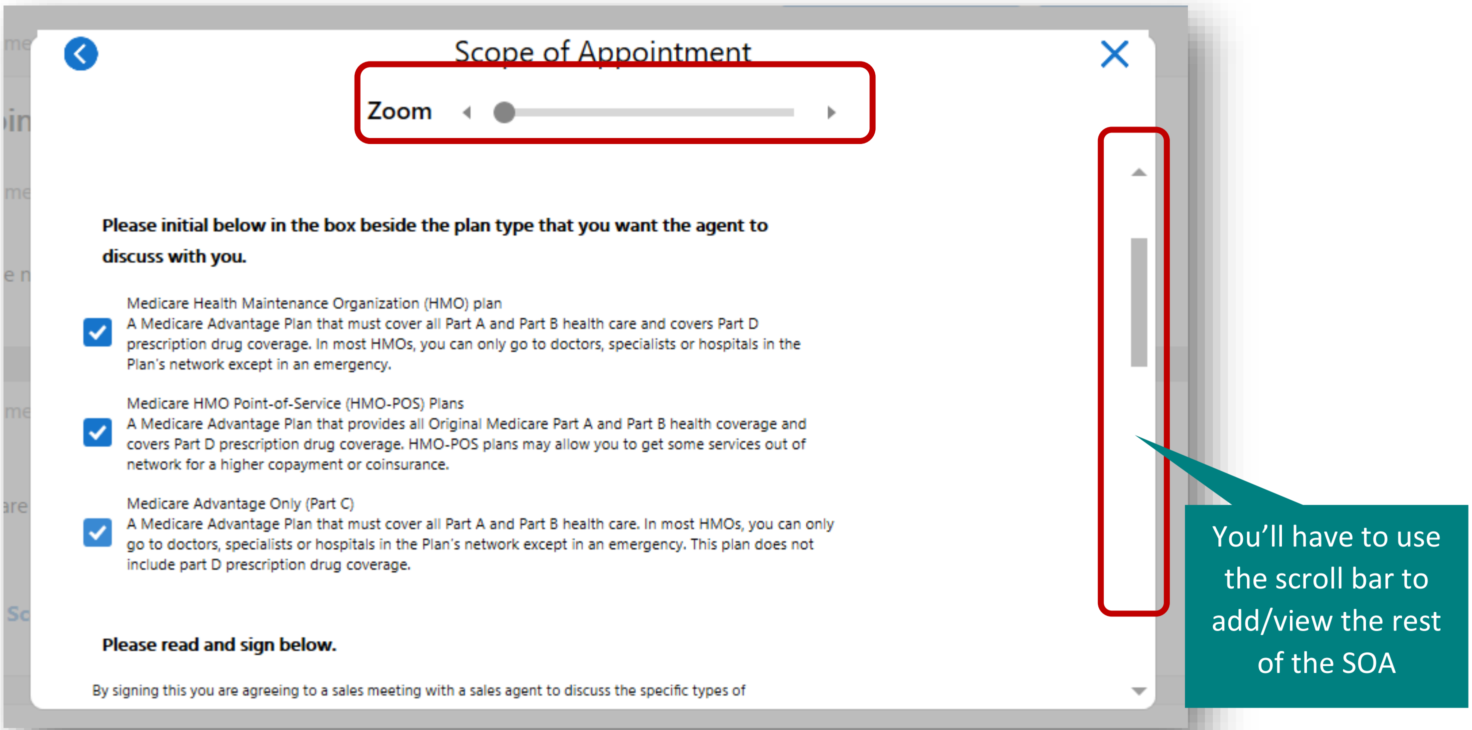
32. Click on the "**Electronic Form**" Button



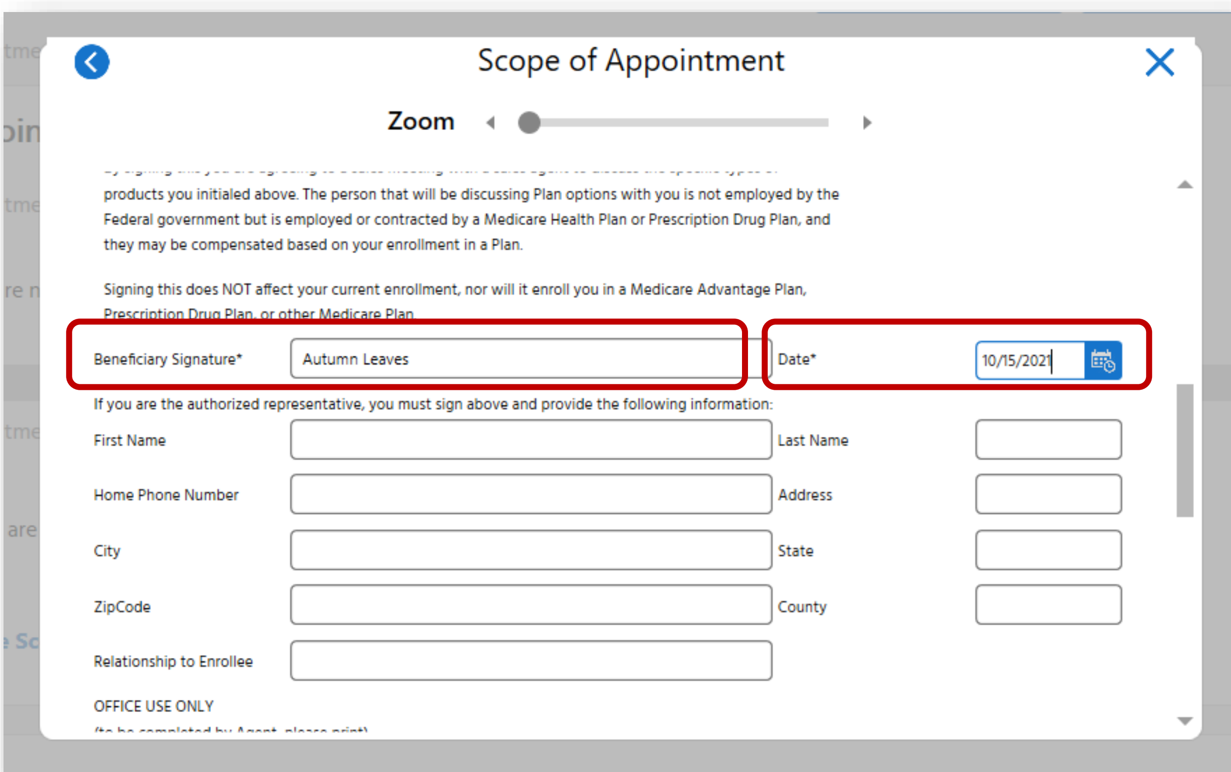
33. Click on "**2022 Scope of Sales Appointment Confirmation Form**"



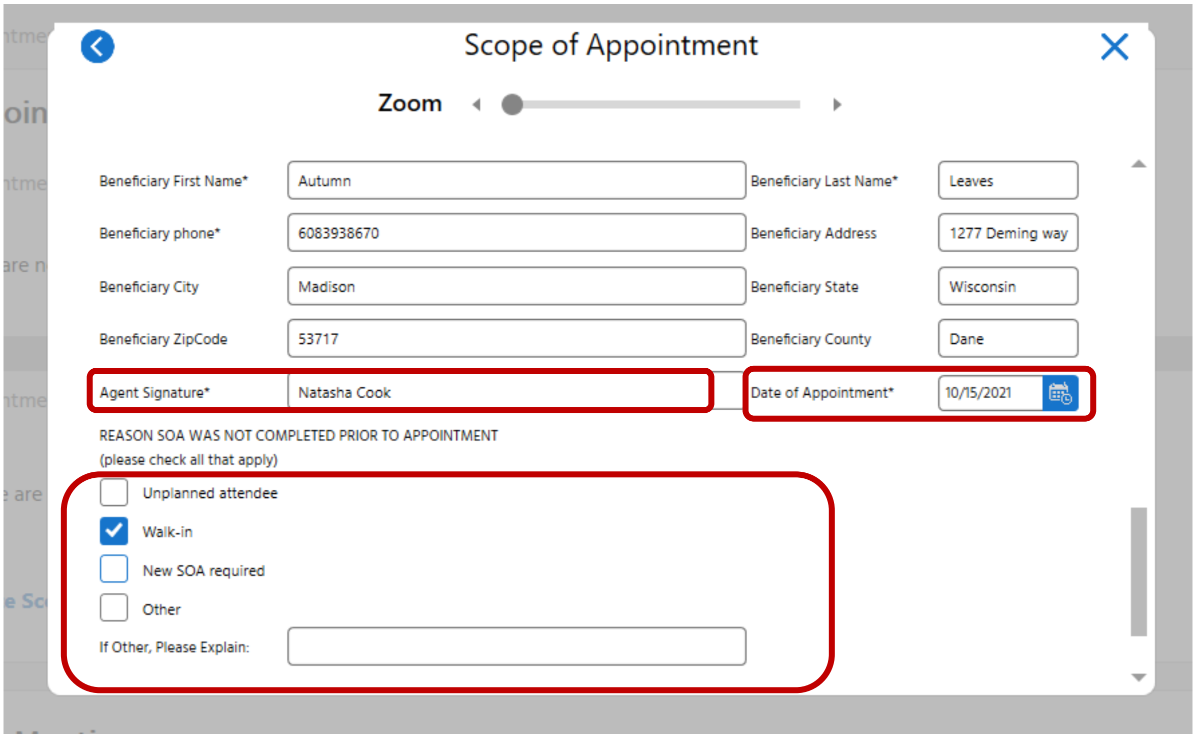
34. Next, click all the products that you want to discuss with your client
    a. **Note**: You may have to "zoom" down the screen to your liking



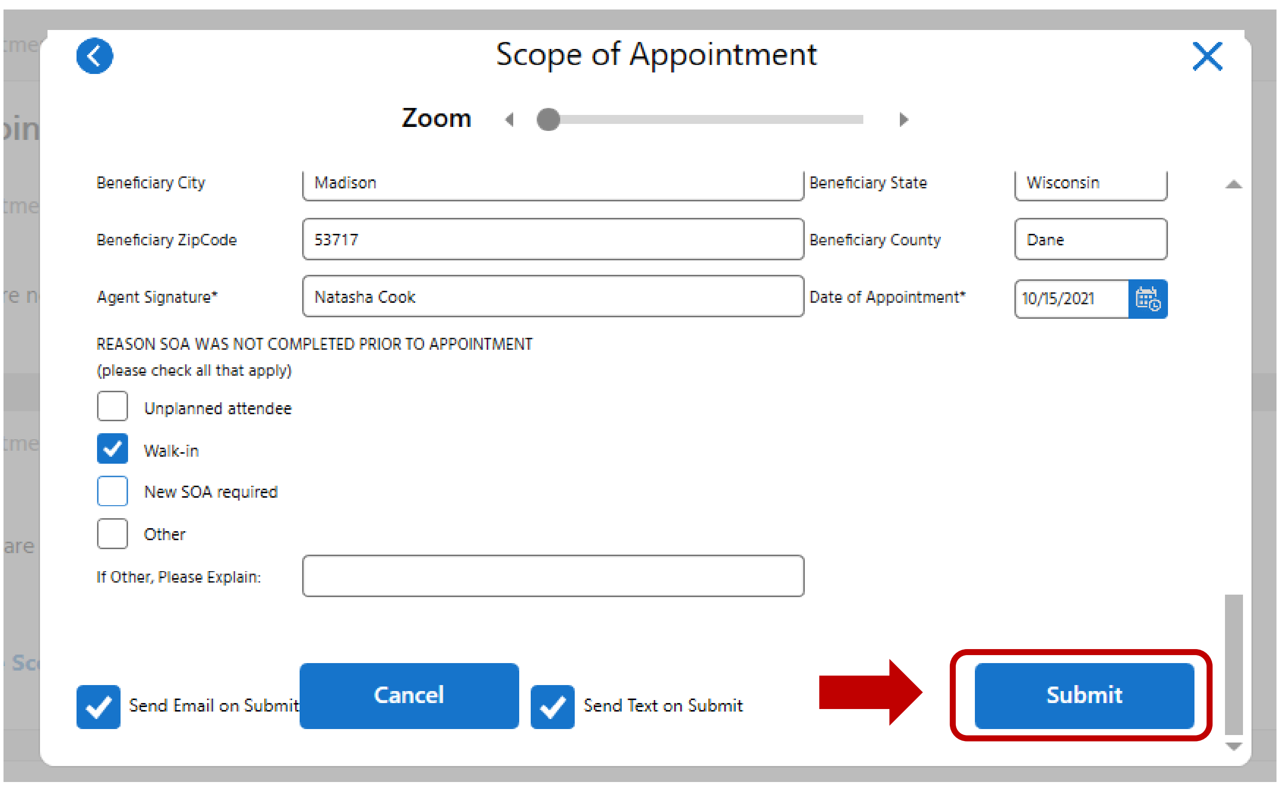
35. Next, you will "**sign**" the beneficiaries name and select the date
    a. Yes this is weird, but will make sense later *(I promise)*



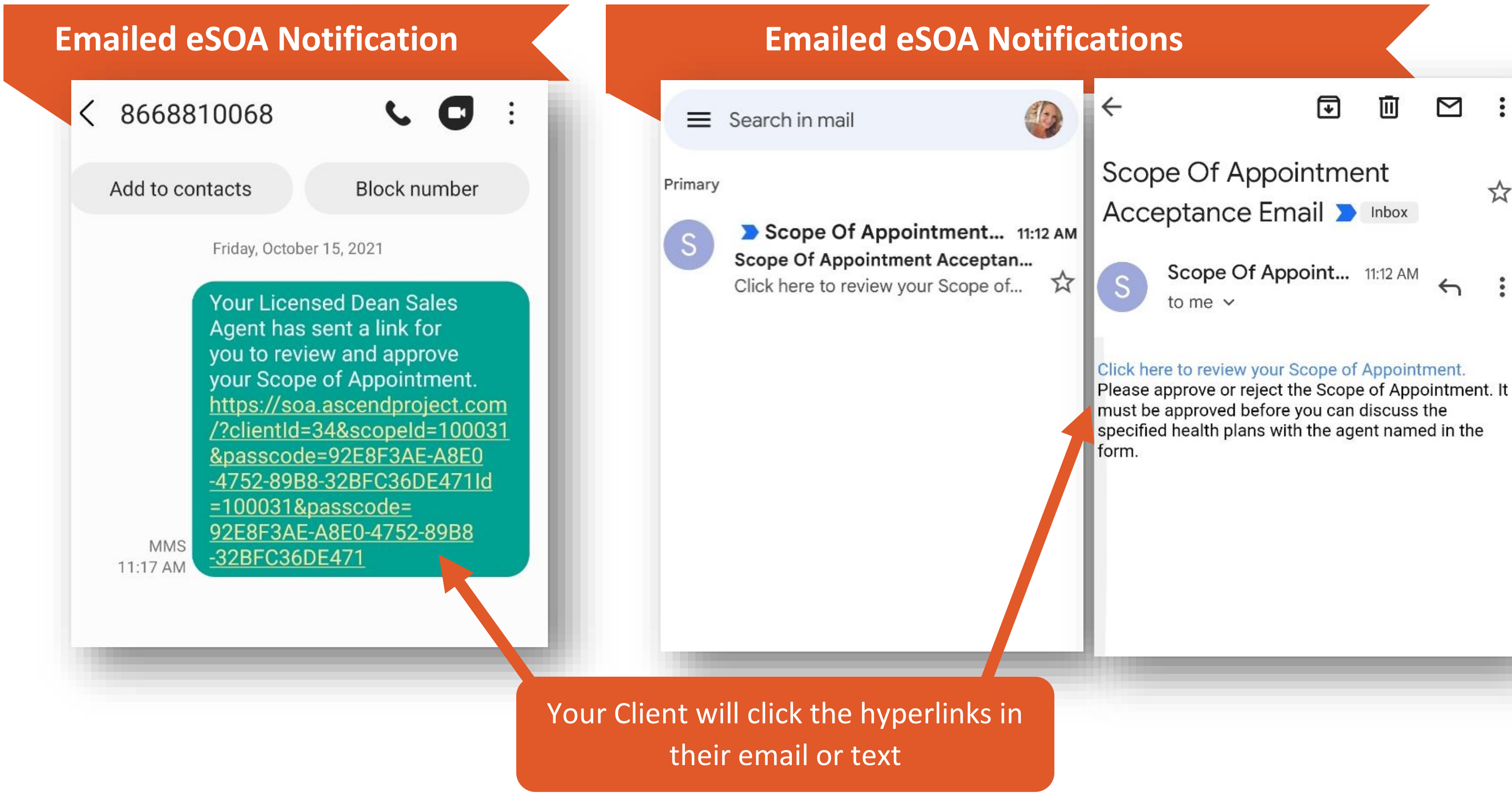
36. Next, sign your name and date of the appointment and reason of taking the SOA



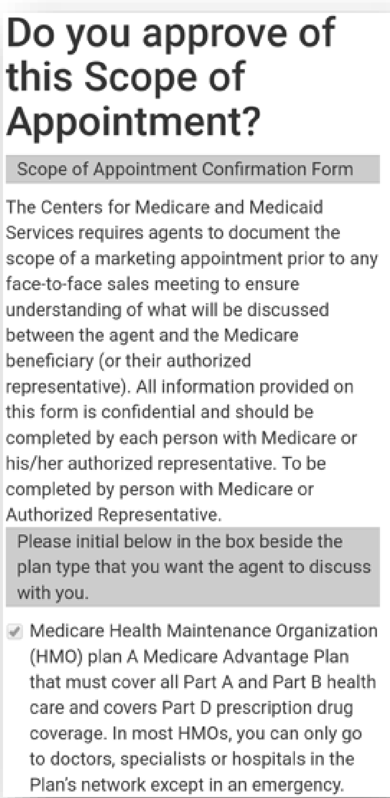
37. Scroll down to the bottom and click on the "**Submit**" button



38. You client will get the below notifications:



39. Your client will click on the hyperlinks and the content will look as follows:



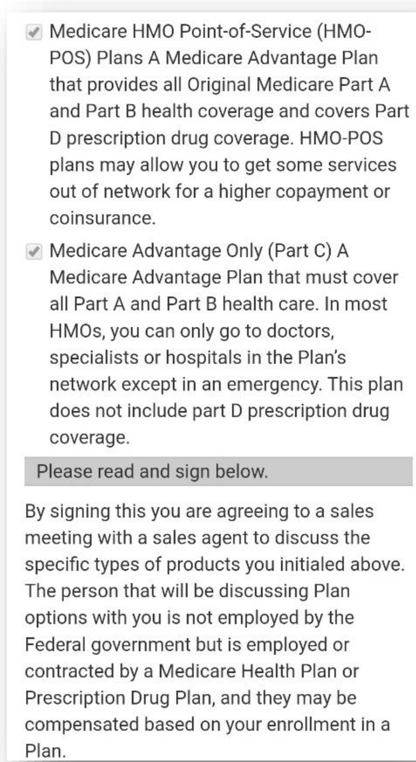
Do you approve of this Scope of Appointment?

Scope of Appointment Confirmation Form

The Centers for Medicare and Medicaid Services requires agents to document the scope of a marketing appointment prior to any face-to-face 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. To be completed by person with Medicare or Authorized Representative.

Please initial below in the box beside the plan type that you want the agent to discuss with you.

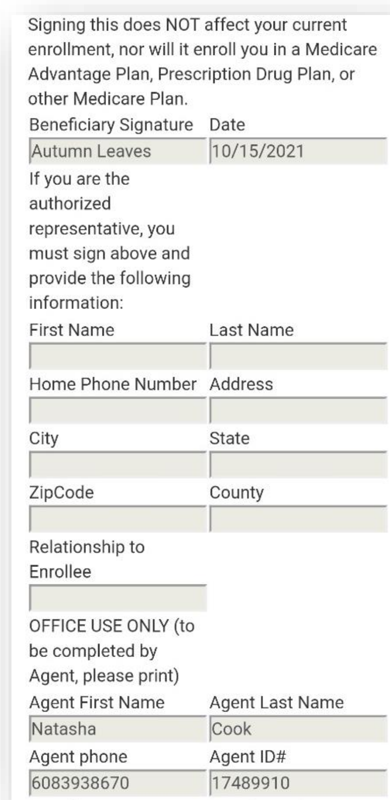
- [x] Medicare Health Maintenance Organization (HMO) plan A Medicare Advantage Plan that must cover all Part A and Part B health care and covers Part D prescription drug coverage. In most HMOs, you can only go to doctors, specialists or hospitals in the Plan's network except in an emergency.



- [x] Medicare HMO Point-of-Service (HMO-POS) Plans A Medicare Advantage Plan that provides all Original Medicare Part A and Part B health coverage and covers Part D prescription drug coverage. HMO-POS plans may allow you to get some services out of network for a higher copayment or coinsurance.
- [x] Medicare Advantage Only (Part C) A Medicare Advantage Plan that must cover all Part A and Part B health care. In most HMOs, you can only go to doctors, specialists or hospitals in the Plan's network except in an emergency. This plan does not include part D prescription drug coverage.

Please read and sign below.

By signing this you are agreeing to a sales meeting with a sales agent to discuss the specific types of products you initialed above. The person that will be discussing Plan options with you is not employed by the Federal government but is employed or contracted by a Medicare Health Plan or Prescription Drug Plan, and they may be compensated based on your enrollment in a Plan.



Signing this does NOT affect your current enrollment, nor will it enroll you in a Medicare Advantage Plan, Prescription Drug Plan, or other Medicare Plan.

Beneficiary Signature	Date
Autumn Leaves	10/15/2021

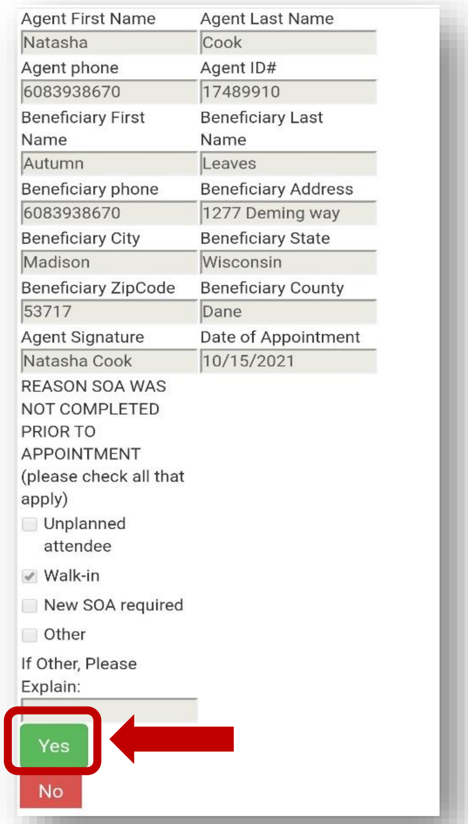
If you are the authorized representative, you must sign above and provide the following information:

First Name	Last Name
Home Phone Number	Address
City	State
ZipCode	County
Relationship to Enrollee	

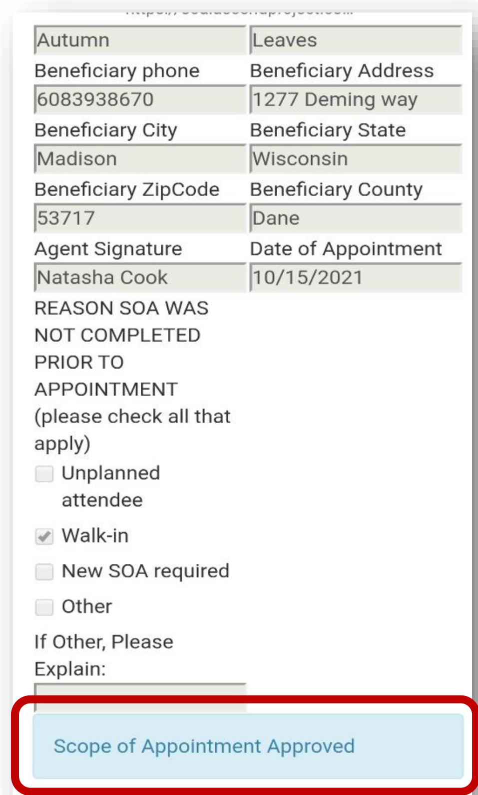
OFFICE USE ONLY (to be completed by Agent, please print)

Agent First Name	Agent Last Name
Natasha	Cook
Agent phone	Agent ID#
6083938670	17489910

40. If the SOA looks good to your client they can scroll to the bottom of the SOA and click the "**Yes**" button
41. They will get a notification that the SOA was approved

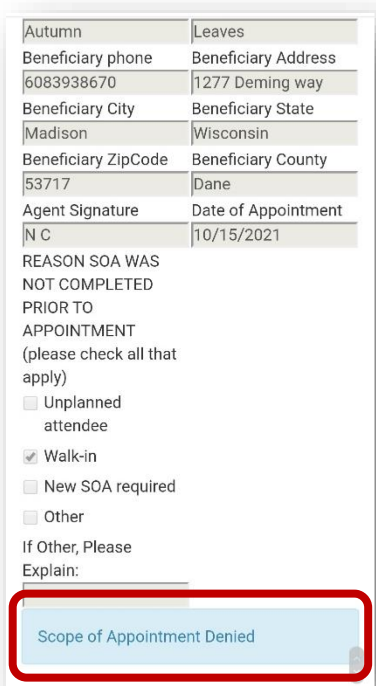


Agent First Name | Agent Last Name
Natasha | Cook
Agent phone | Agent ID#
6083938670 | 17489910
Beneficiary First Name | Beneficiary Last Name
Autumn | Leaves
Beneficiary phone | Beneficiary Address
6083938670 | 1277 Deming way
Beneficiary City | Beneficiary State
Madison | Wisconsin
Beneficiary ZipCode | Beneficiary County
53717 | Dane
Agent Signature | Date of Appointment
Natasha Cook | 10/15/2021
REASON SOA WAS NOT COMPLETED PRIOR TO APPOINTMENT (please check all that apply)
Unplanned attendee
Walk-in
New SOA required
Other
If Other, Please Explain:
Yes
No



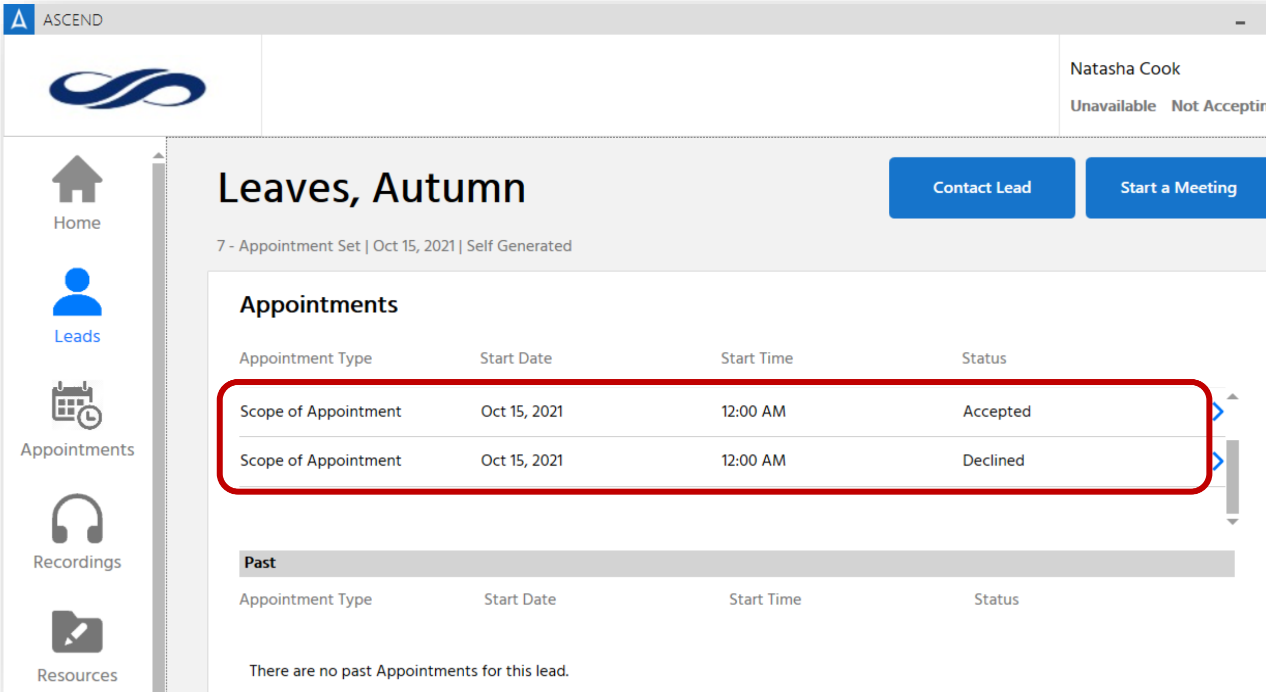
Autumn | Leaves
Beneficiary phone | Beneficiary Address
6083938670 | 1277 Deming way
Beneficiary City | Beneficiary State
Madison | Wisconsin
Beneficiary ZipCode | Beneficiary County
53717 | Dane
Agent Signature | Date of Appointment
Natasha Cook | 10/15/2021
REASON SOA WAS NOT COMPLETED PRIOR TO APPOINTMENT (please check all that apply)
Unplanned attendee
Walk-in
New SOA required
Other
If Other, Please Explain:
Scope of Appointment Approved

42. If they decline the SOA, they will get the below notification and a new SOA will need to be sent to them



Autumn | Leaves
Beneficiary phone | Beneficiary Address
6083938670 | 1277 Deming way
Beneficiary City | Beneficiary State
Madison | Wisconsin
Beneficiary ZipCode | Beneficiary County
53717 | Dane
Agent Signature | Date of Appointment
N C | 10/15/2021
REASON SOA WAS NOT COMPLETED PRIOR TO APPOINTMENT (please check all that apply)
Unplanned attendee
Walk-in
New SOA required
Other
If Other, Please Explain:
Scope of Appointment Denied

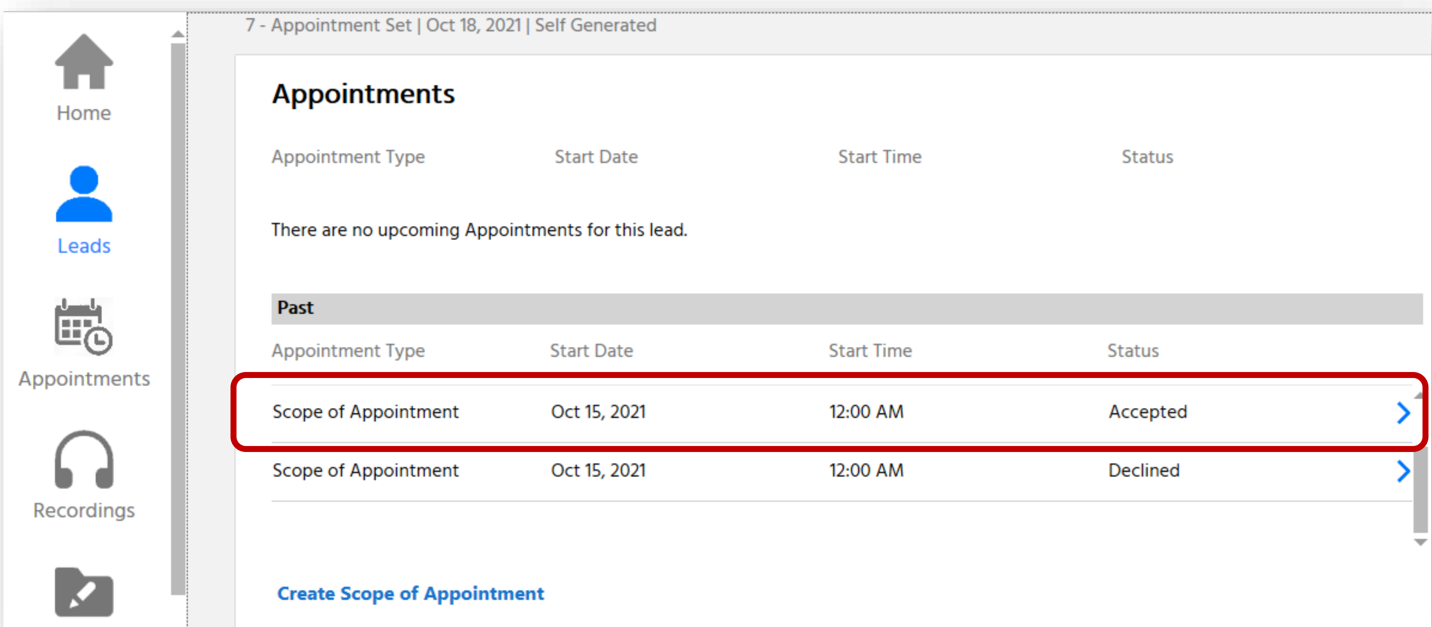
43. If you go back into your lead, you will see if the SOA has been accepted or declined



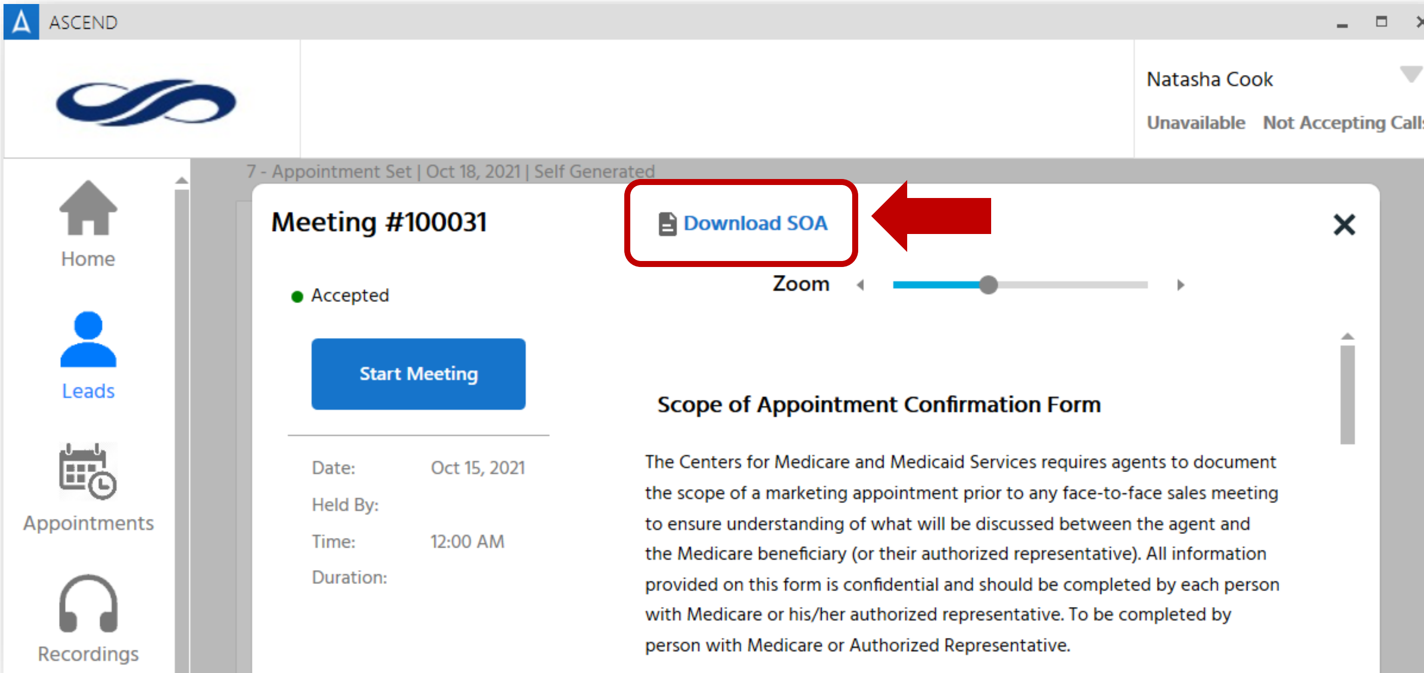
44. Once the SOA has been approved you can start a meeting with that lead!

How to access eSOA's

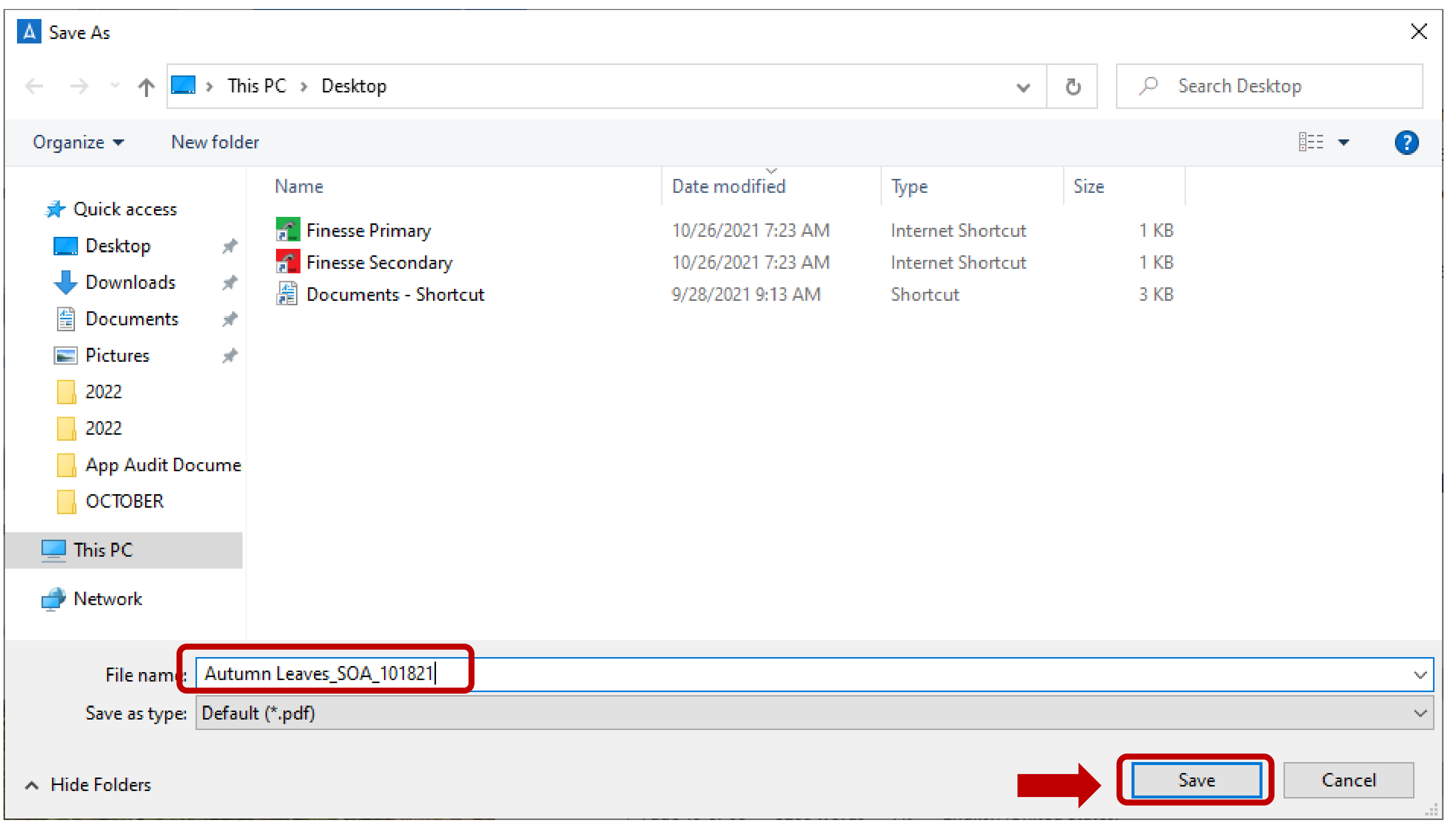
45. Go into your lead that you sent the eSOA to
46. Under "**Appointments**", click on the approved Scope of Appointment



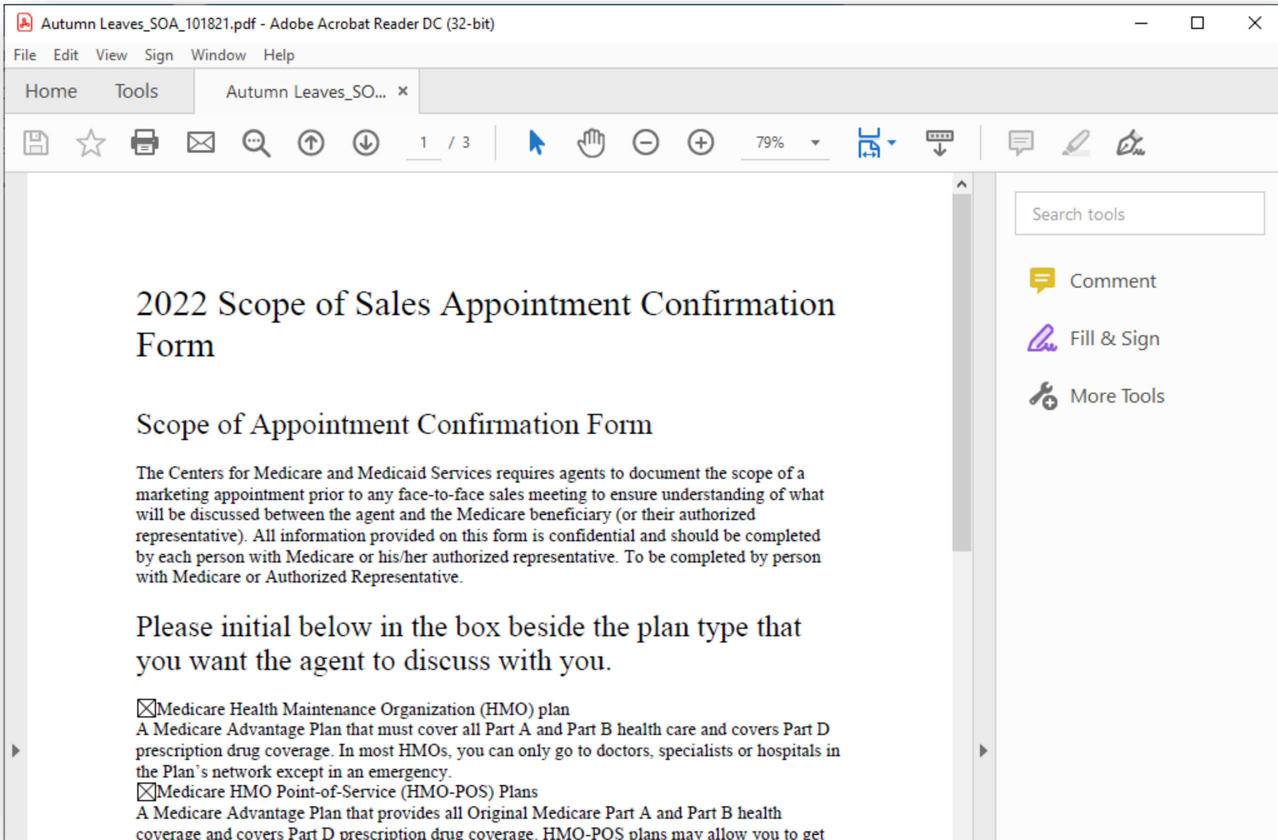
47. Click on the "**Download SOA**" button



48. Your documents folder will pop up and you can chose the location and the file name of the SOA and click on the "**Save**" button

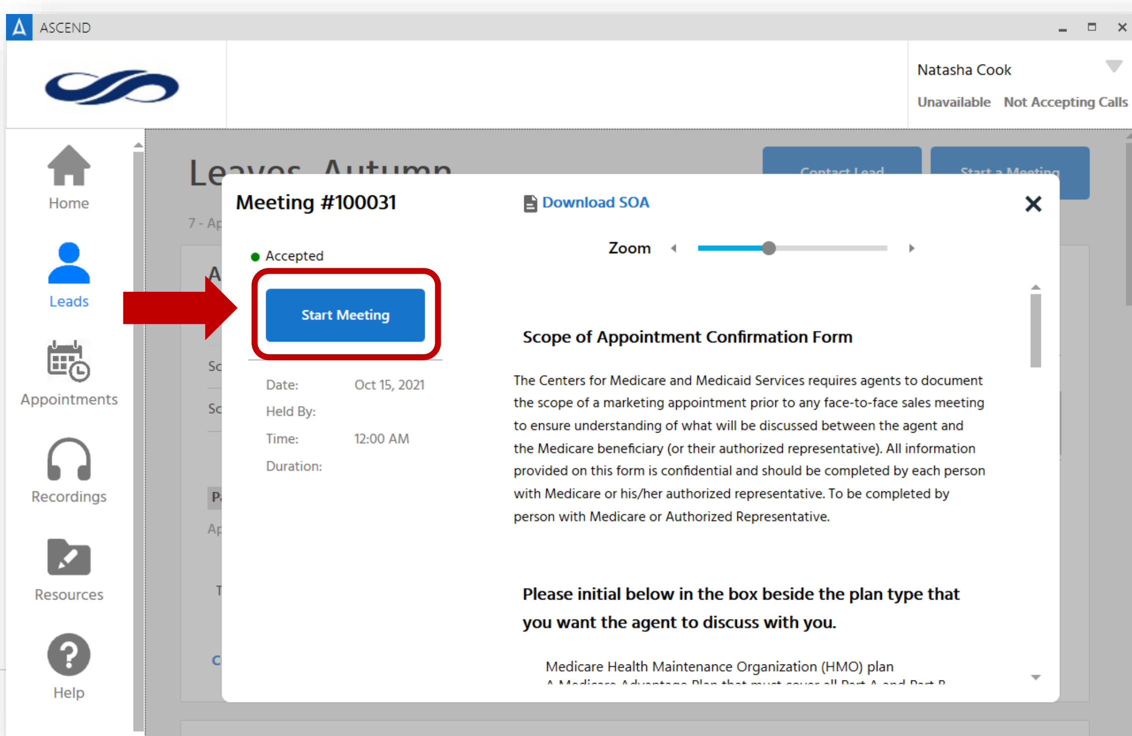


49. The document will be saved as a PDF. Dean Health Plan Administrators have access to view all eSOA's so you don't have to worry about sending the eSOA to us

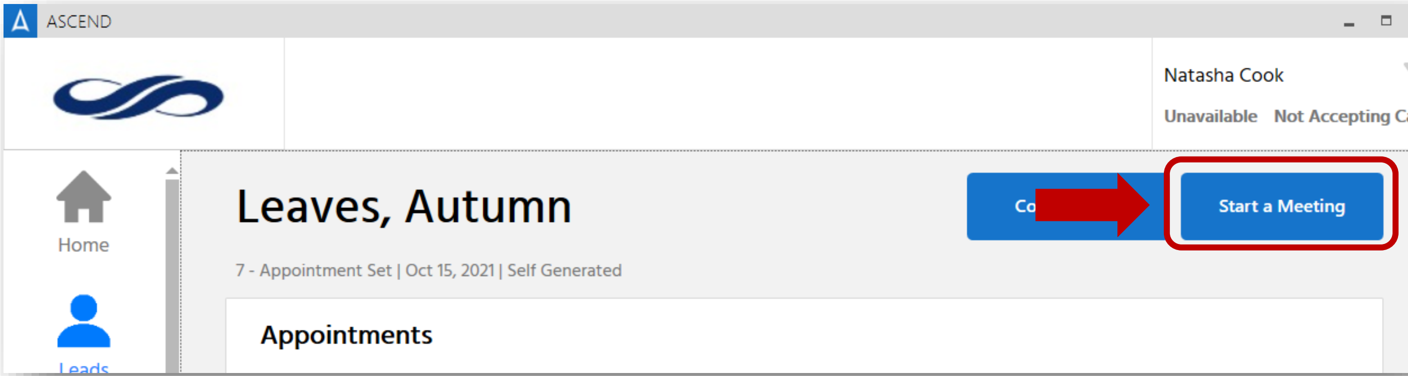


Starting a Meeting

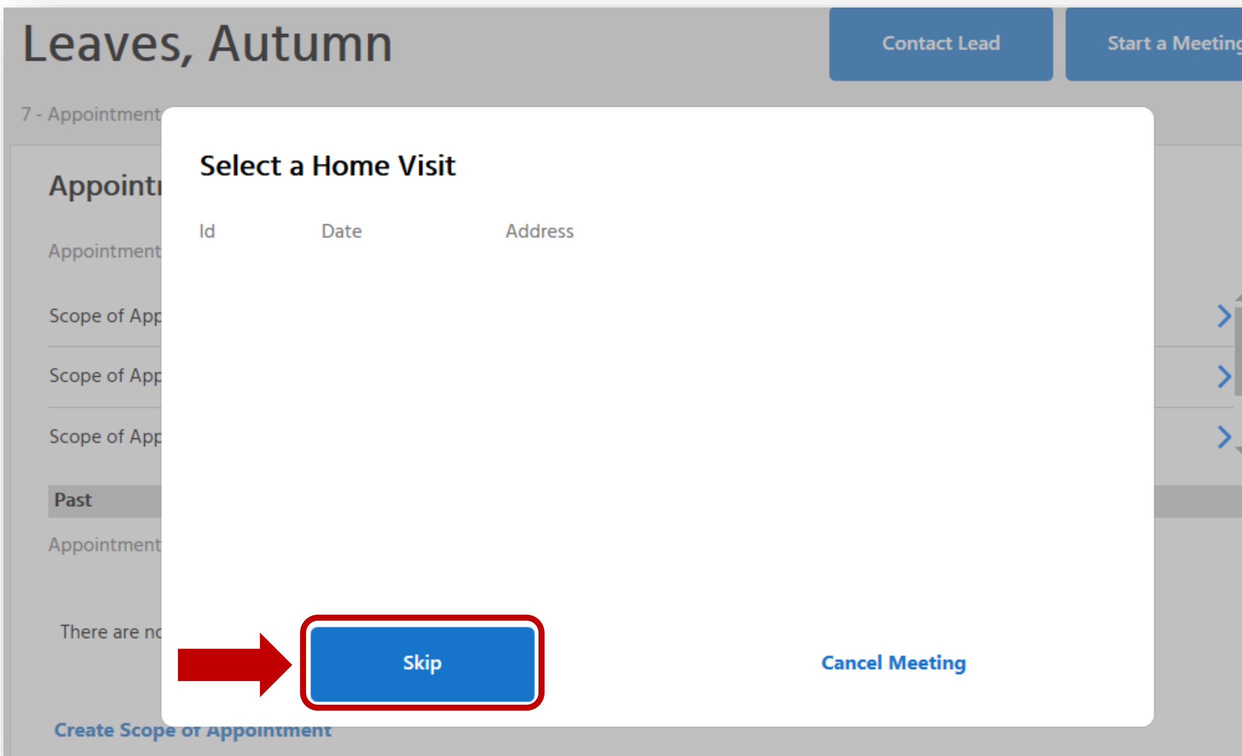
50. Starting from step 37, click on the "**Start Meeting**" button



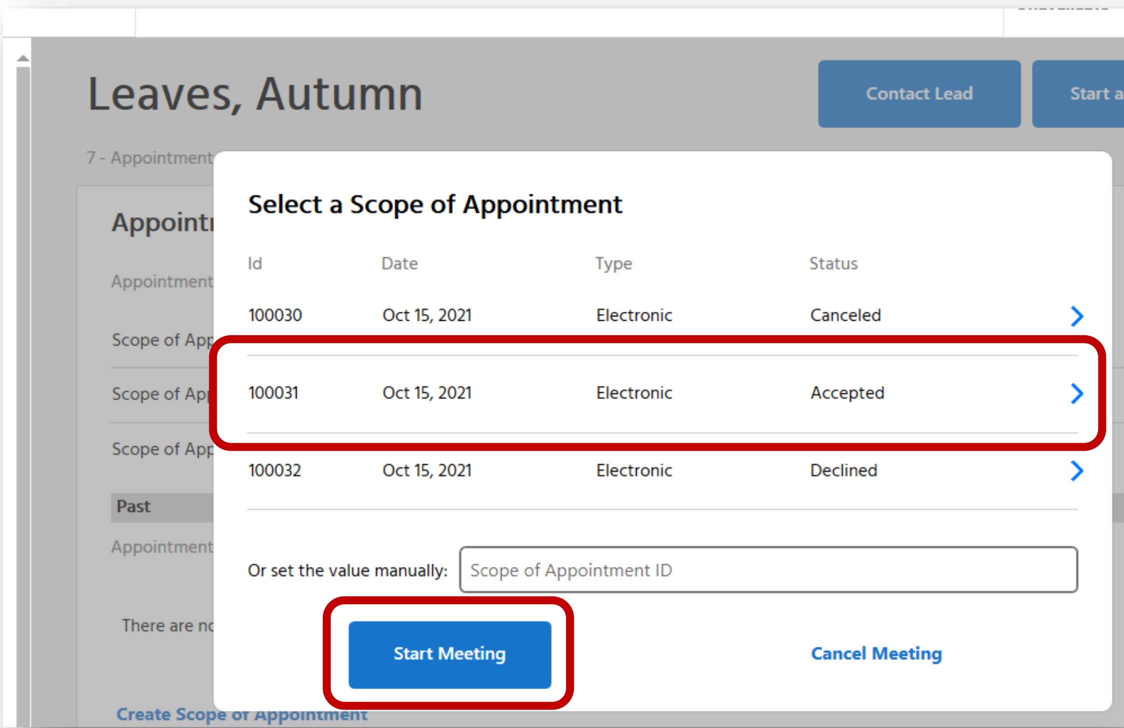
51. If you have already obtained an SOA and want to start a meeting directly from the lead, click on the lead that you have your meeting set with and click on the "**Start Meeting**" button as well



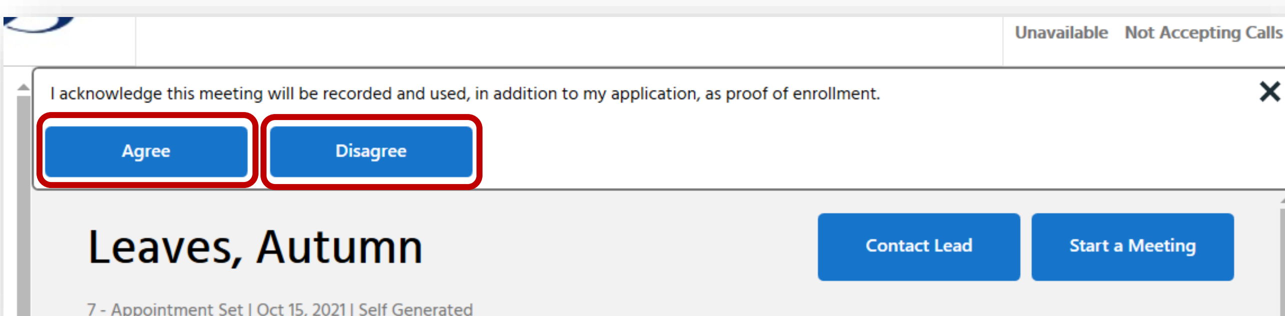
52. Skip the "**Select a Home Visit**" section – we don't use this feature



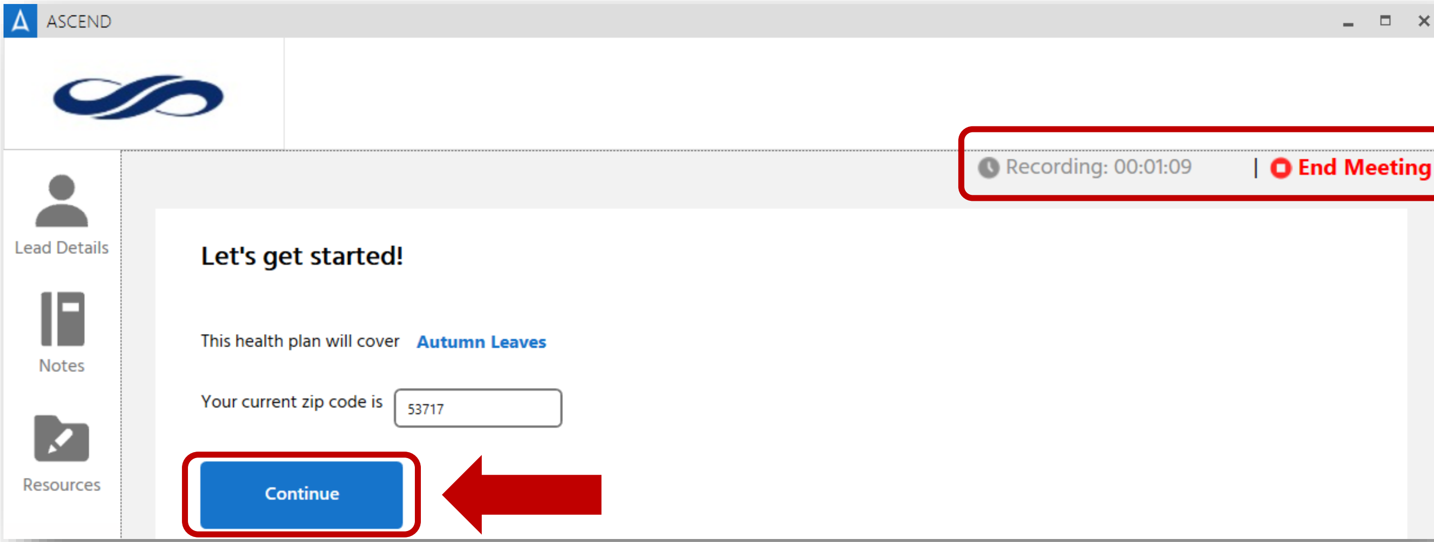
53. Next, select the approved eSOA, if you used this feature for your client; other click the “Start Meeting” button without selecting an SOA



54. The next pop up will be the **Recording Disclaimer**, here you would click on “**Agree**” or “**Disagree**”
    a. This is not a requirement; however, its recommended to cover yourself should your Client file a complaint or grievance
        i. Click **Agree:** If you want your meeting recorded simply ask your client: *“Is it ok if our appointment today is recorded?”*
            1. Most of the time they will say yes
            2. You might get someone who declines having the appointment recorded
        i. Click **Disagree**: If you don’t want your appointment recorded or your client states that they don’t want the appointment recorded



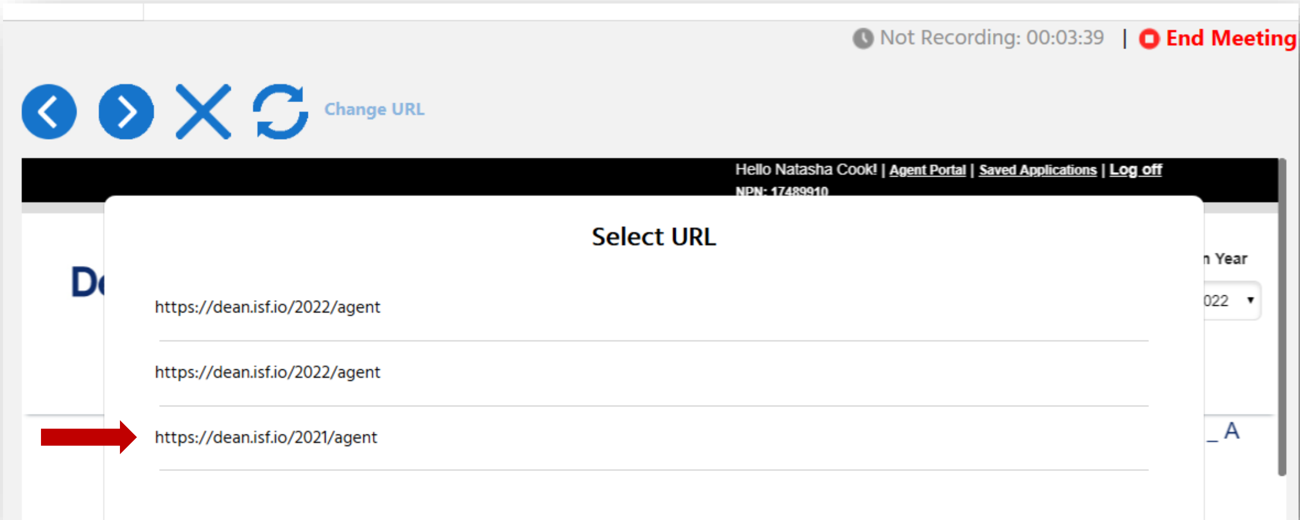
55. You will see that the meeting has started in the upper right-hand corner
56. Next, make sure the right zip code populated and click on the "**Continue**" button



Switching Plan Years

57. Depending on what years you are certified to sell, you may need to change between plan years depending on what plan year your client needs coverage for
58. If you have someone who needs a different plan year, click on "**Change URL**" and click the appropriate year
    a. The most current plan year will be the default

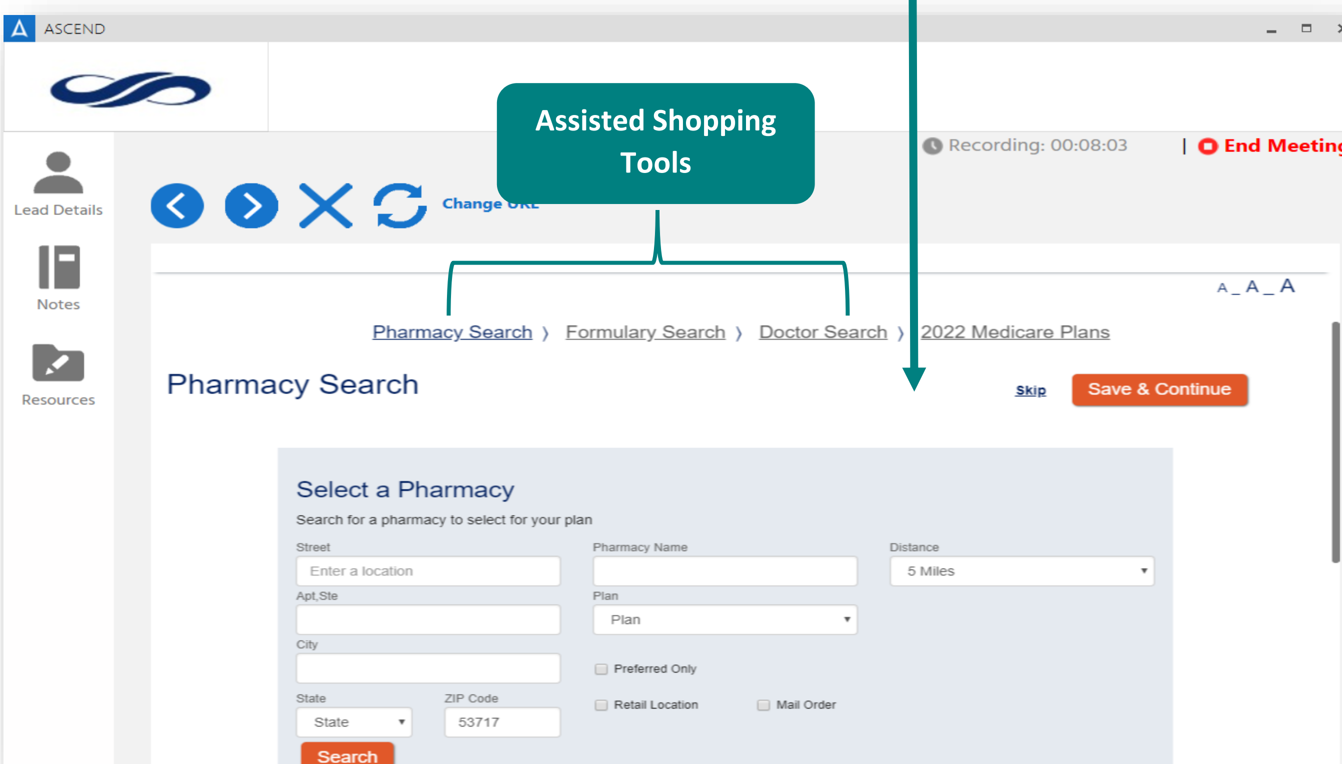
59. From the drop down click on the appropriate year
    a. Please note that you will only see the years that you are certified to sell for



60. You will then see the plans and details available for that year

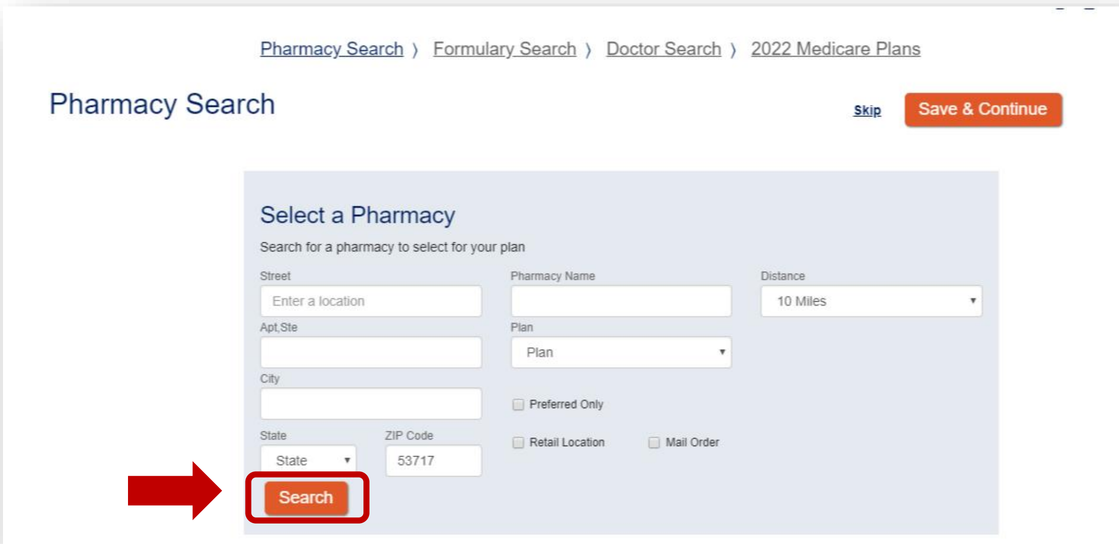
Assisted Shopping Tools

61. If you wish to use the assisted shopping tools (i.e. Pharmacy Search, Formulary Search (Rx Look-up), and Doctor Search features) you can enter your clients information
62. If you want to skip the Assisted Shopping Tools, click on "**2022 Medicare Plans**" to go right to the plans to compare/enroll

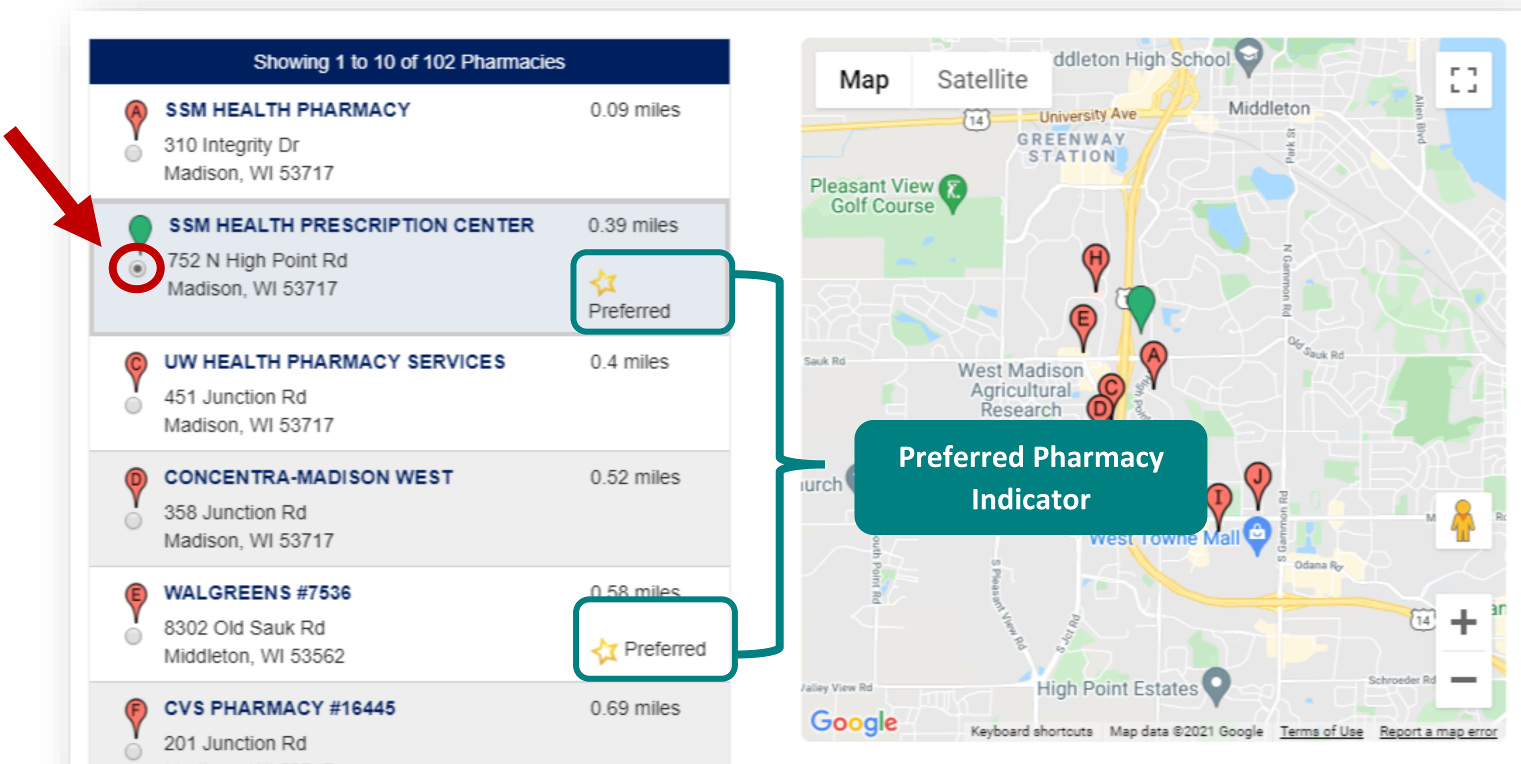


Pharmacy Search

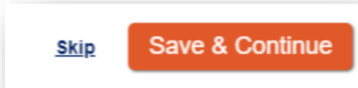
63. You can search our pharmacy directory right from the application
    a. You can change the mile range, show only preferred pharmacies, retail locations, or mail order
64. After you have your search parameters entered, click on the "**Search**" button



65. From the list, all preferred pharmacies will be indicated with a star icon
66. Click the pharmacy you want to check your clients drugs against

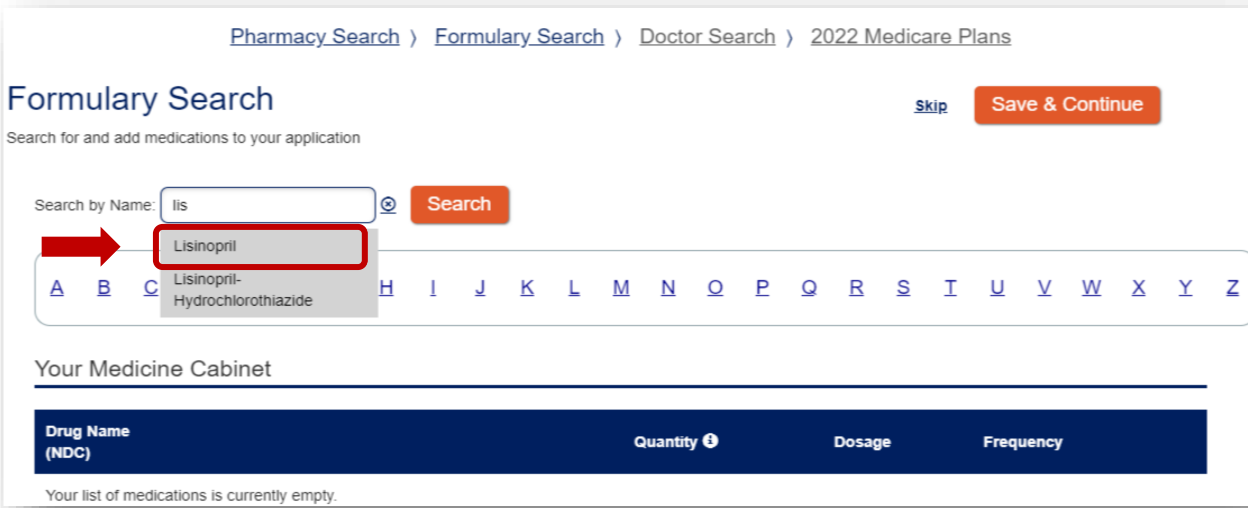


67. Click the “**Save and Continue”** button from either the bottom or top of the page

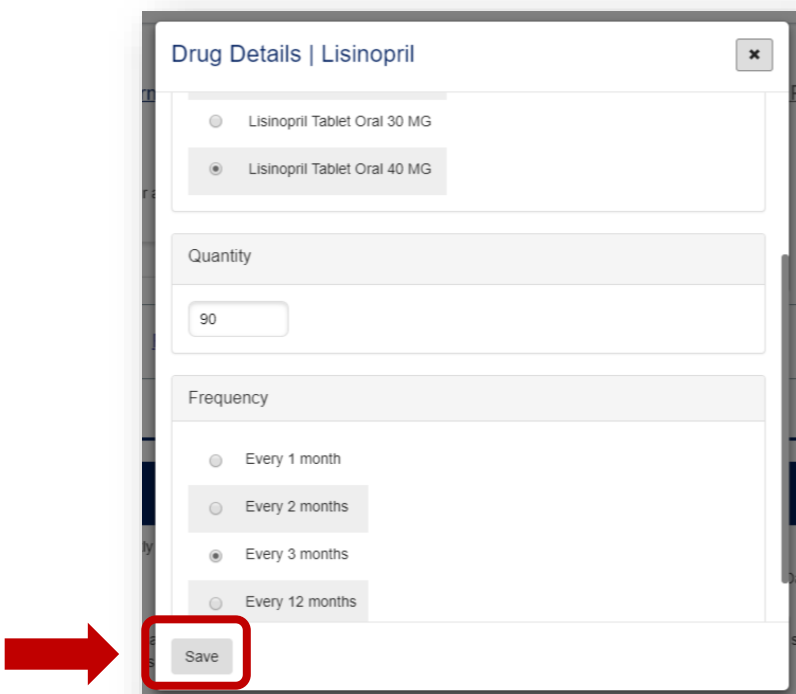


Formulary Search

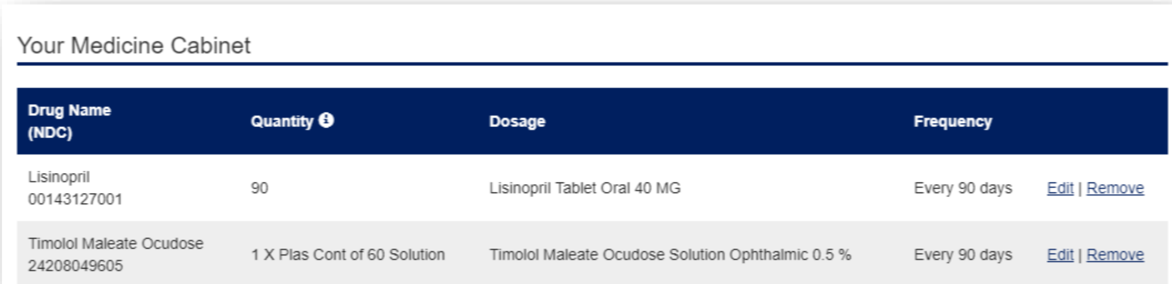
68. The formulary search, allows you to enter your clients medications to see how they price out on our plans
69. In the search field, start adding your clients drugs by typing in the search box
70. Click on the drug in question



71. Next, choose the appropriate dosage, quantity, and frequency and click the “**Save**” button



72. Continue to keep adding drugs until they are all showing in their “**Medicine Cabinet**”



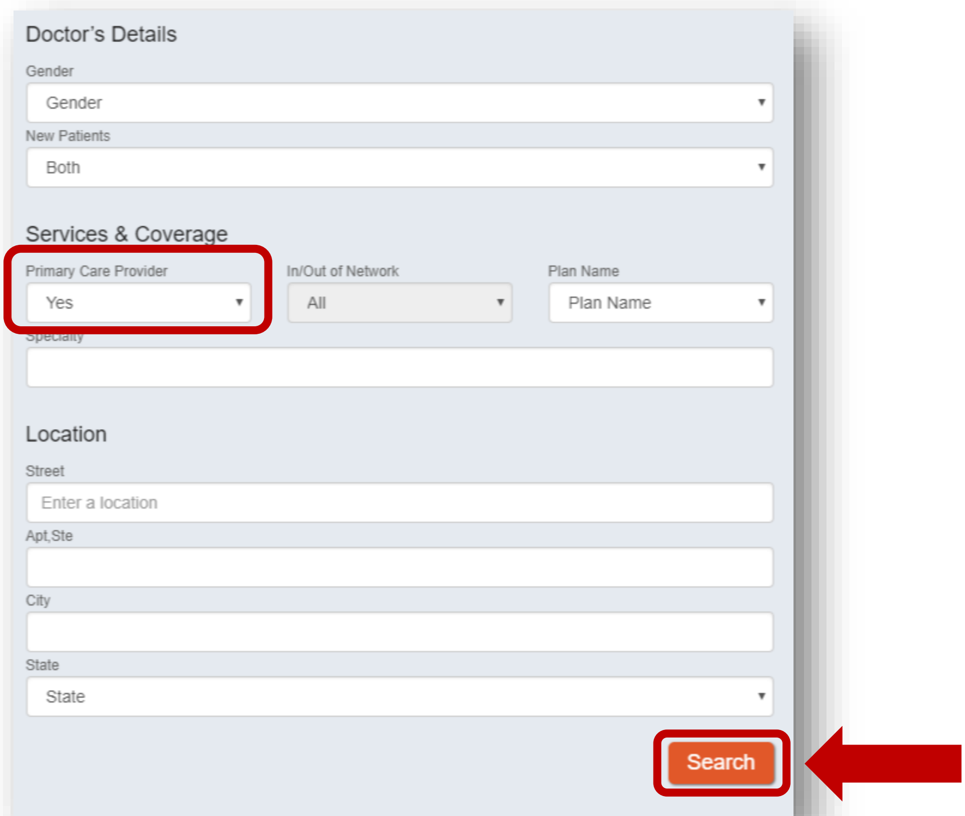
Your Medicine Cabinet

Drug Name (NDC)	Quantity	Dosage	Frequency	
Lisinopril 00143127001	90	Lisinopril Tablet Oral 40 MG	Every 90 days	Edit | Remove
Timolol Maleate Ocudose 24208049605	1 X Plas Cont of 60 Solution	Timolol Maleate Ocudose Solution Ophthalmic 0.5 %	Every 90 days	Edit | Remove

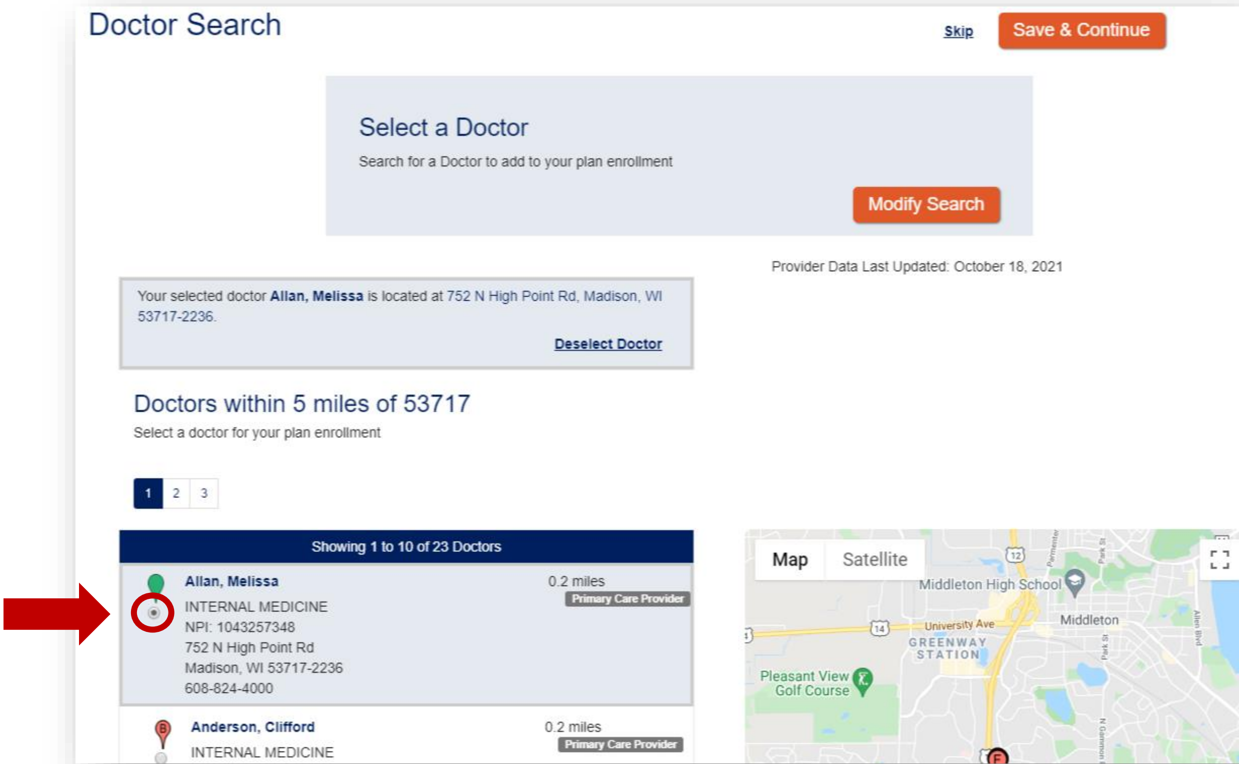
73. Again, click the “**Save and Continue”** button from either the bottom or top of the page

Doctor Search

74. Again, within the application you can search providers
75. If you click the “**Advanced Search**” search button you can search PCP and Specialists
76. If you want to look up only PCP’s choose “**Yes**” under the PCP section
    a. If you add a PCP provider it will transfer over to the application
77. If you are looking up Specialists, choose “**No**” under the PCP section and start typing in the specialty and click enter after you have typed in the specialty or you click on the “**Search**” button after your criteria has been added



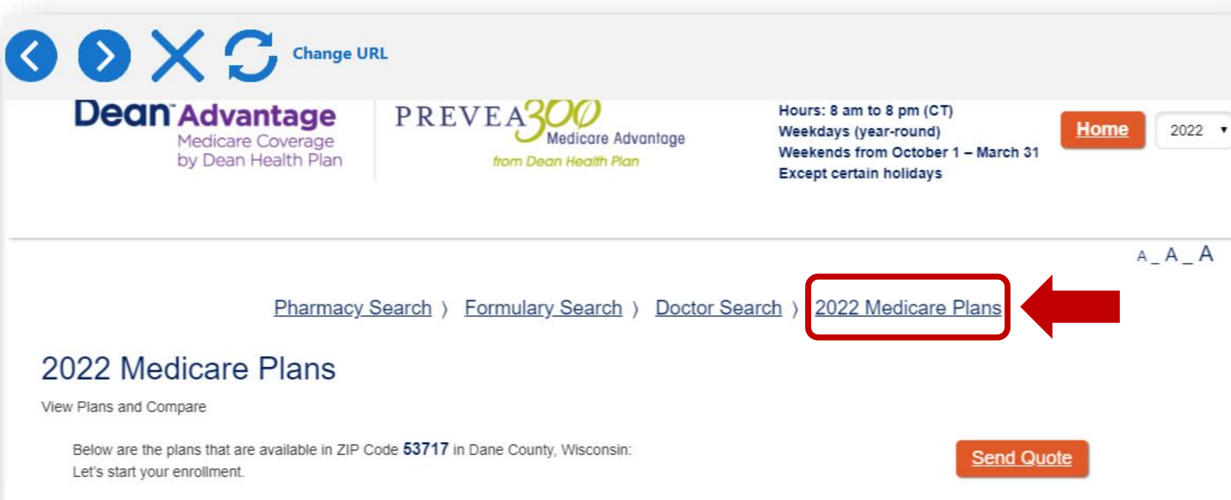
78. For PCP add, click on the radio button next to the PCP that the customer uses. Again, this will transfer over to the application



79. Again, click the "**Save and Continue"** button from either the bottom or top of the page

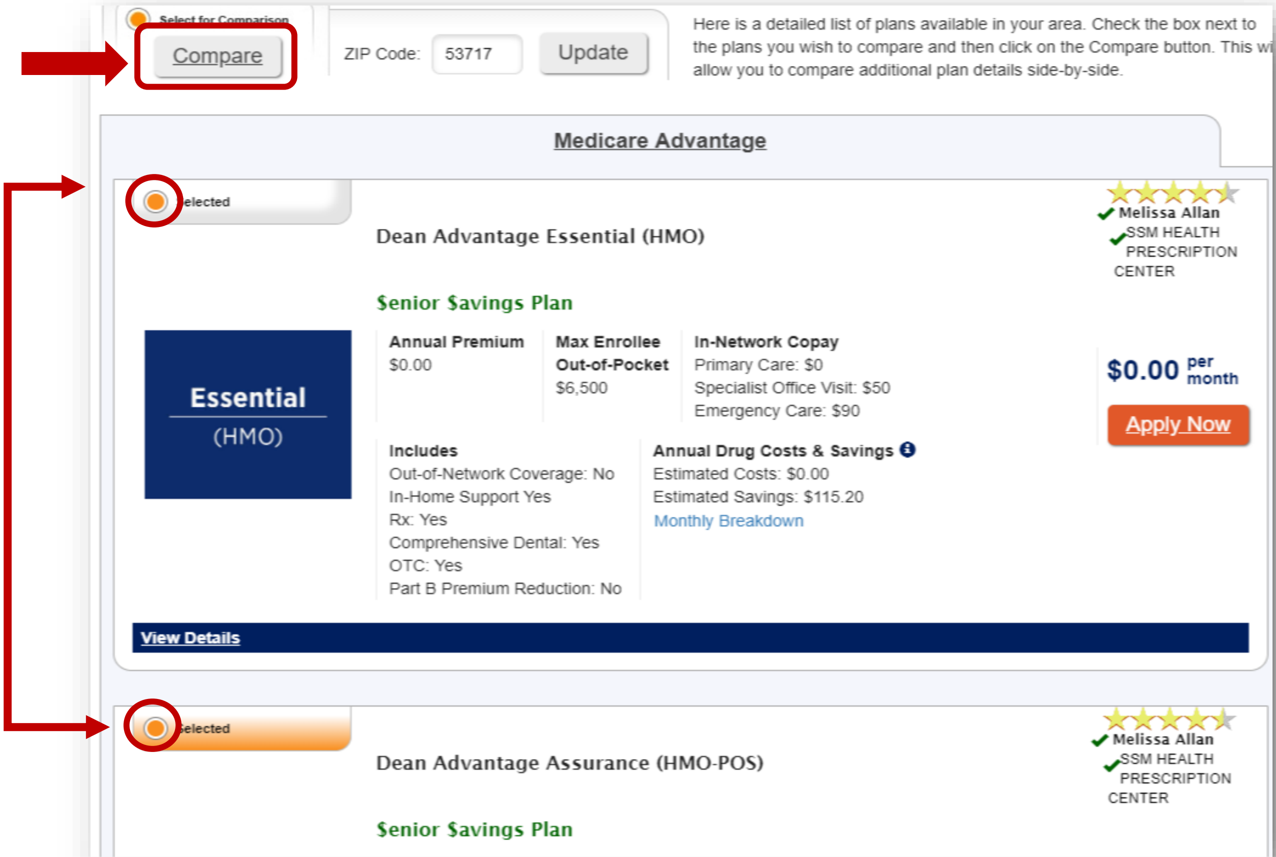
Quoting & Enrolling

80. If not using the Assisted Shopping tools click on the "**2022 Medicare Plans**" tab



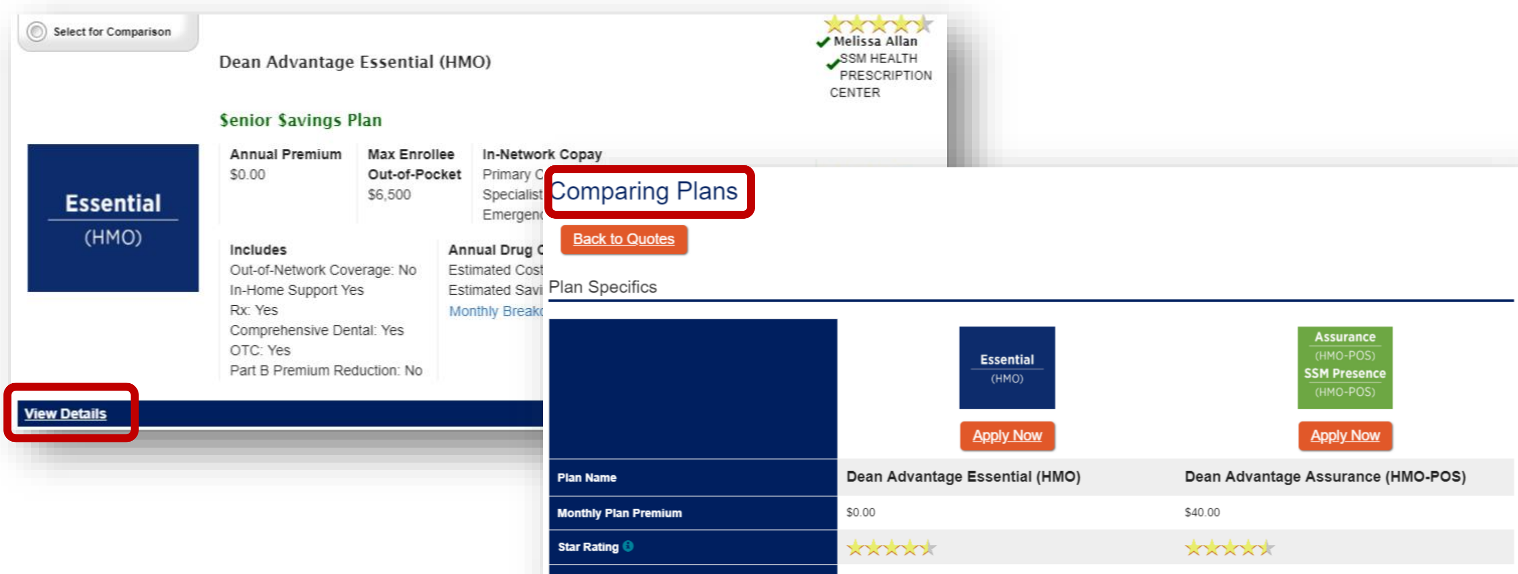
Compare Plans

81. You can click on the radio button next to each plan that your client is interested in to do a side-by-side comparison and then click on the "**Compare**" button at the top of the screen

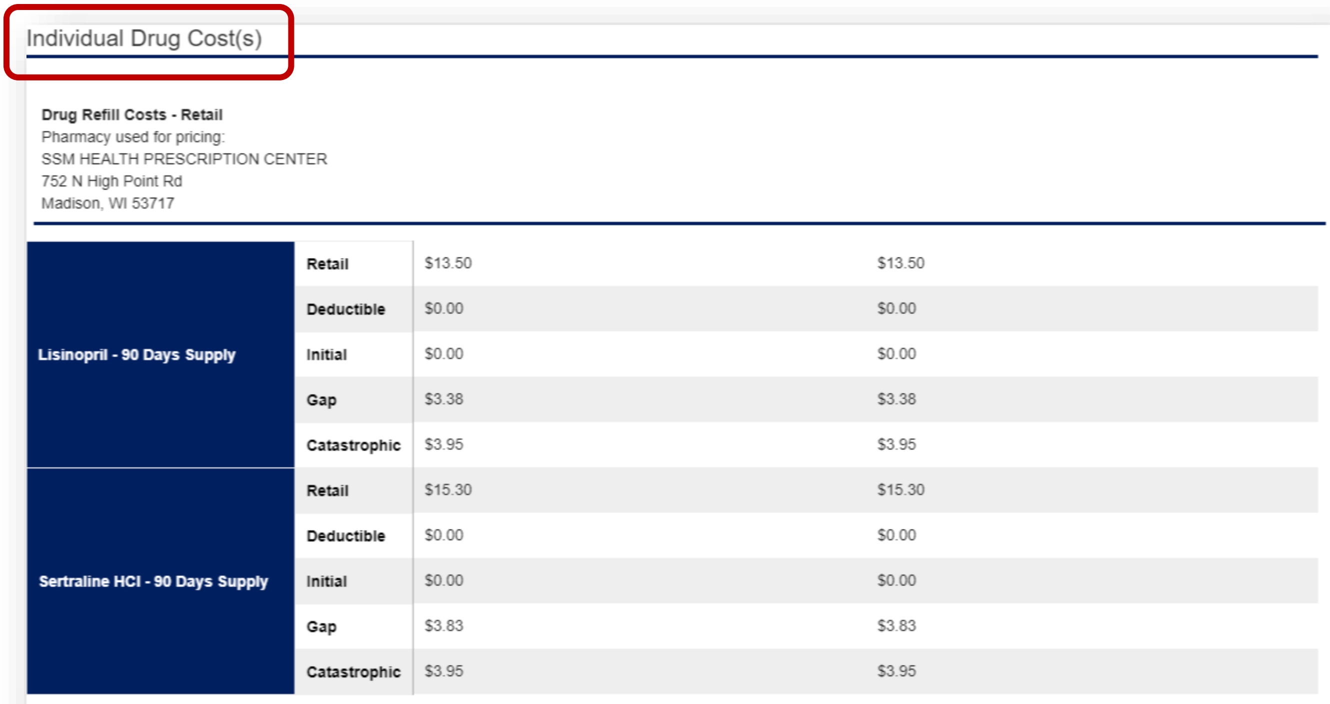


View Details/Comparison

82. Click on the "**View Details**" link underneath the plan you are looking for details for



83. In this section you can see the cost estimator of the drugs added as well under the “**Individual Drug Cost(s)**” section

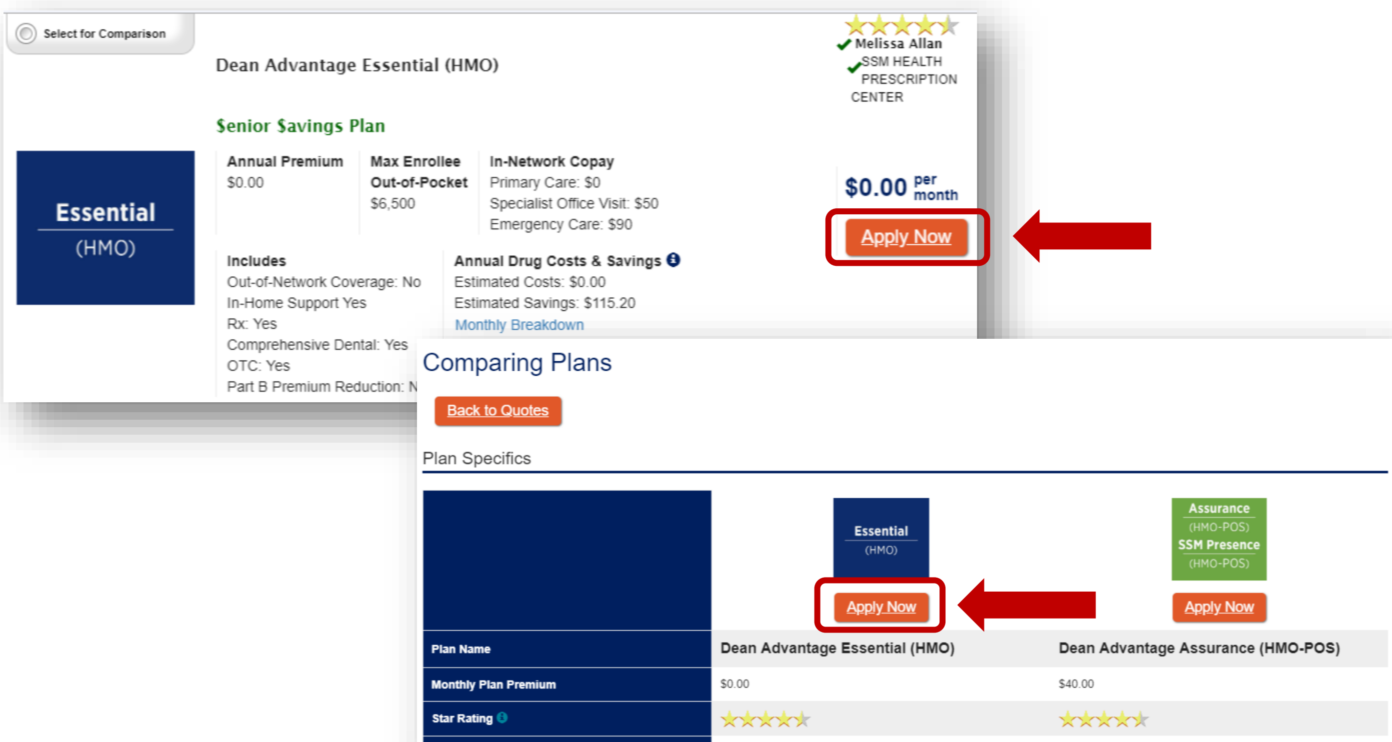


Individual Drug Cost(s)

Drug Refill Costs - Retail
Pharmacy used for pricing:
SSM HEALTH PRESCRIPTION CENTER
752 N High Point Rd
Madison, WI 53717

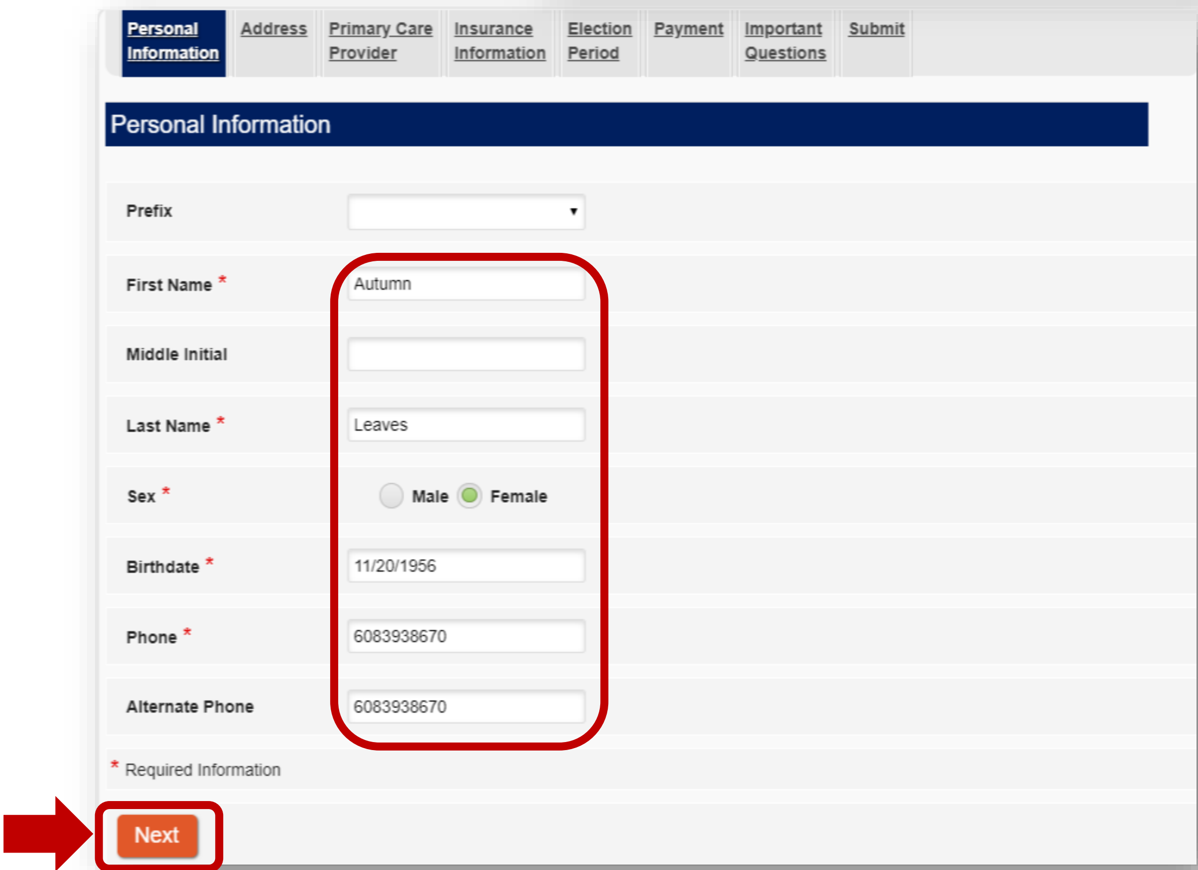
Lisinopril - 90 Days Supply	Retail	$13.50	$13.50
	Deductible	$0.00	$0.00
	Initial	$0.00	$0.00
	Gap	$3.38	$3.38
	Catastrophic	$3.95	$3.95
Sertraline HCl - 90 Days Supply	Retail	$15.30	$15.30
	Deductible	$0.00	$0.00
	Initial	$0.00	$0.00
	Gap	$3.83	$3.83
	Catastrophic	$3.95	$3.95

84. Once your client is ready to enroll, click on the “**Apply Now**” button



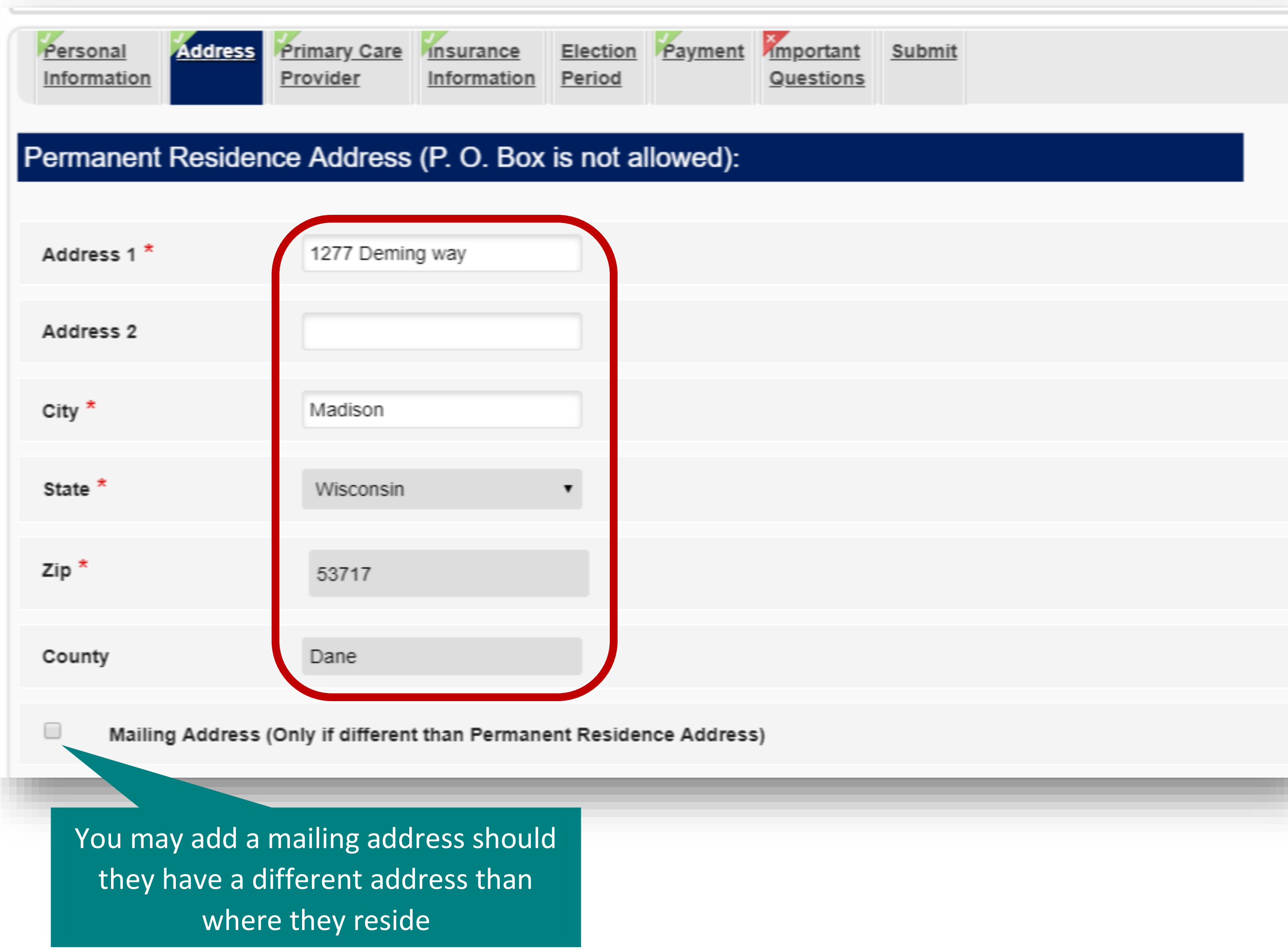
Personal Information

85. **AMA Users**: Your lead information should have carried to the application, verify that the content transferred over correctly
86. **Ascend Broker Portal Users:** Fill out your client demographics
87. You can either click the "**Next**" button or click on the tabs at the top to move on to the next page
    a. There will be a red "**X**" if a tab is missed or required information is not filled out



Address:

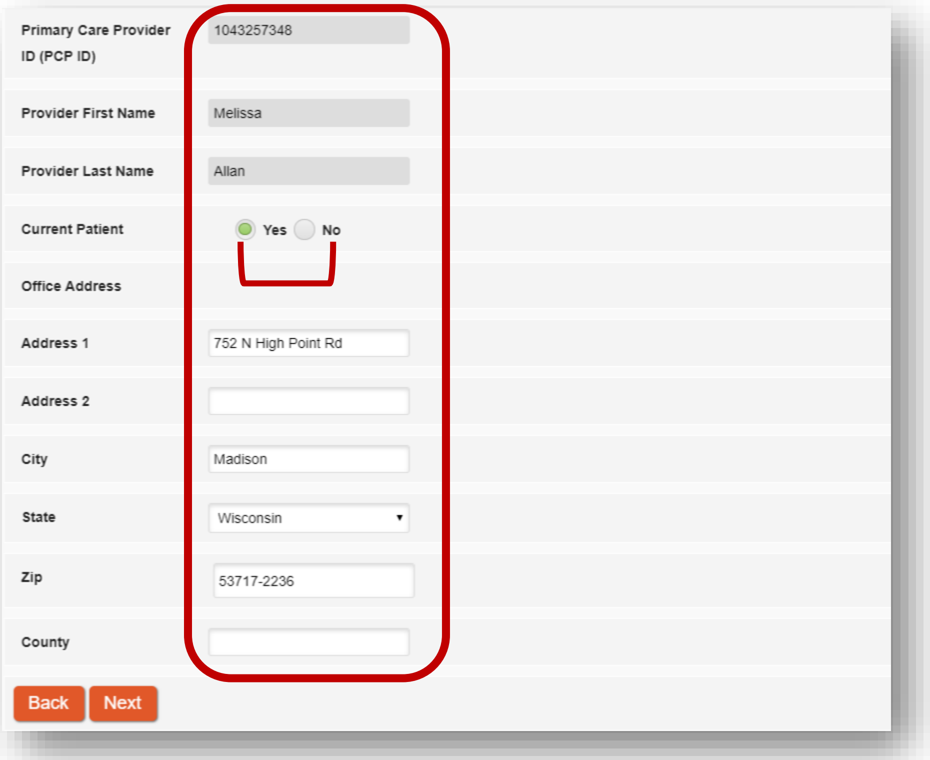
88. **AMA Users:** Verify the address transferred over correctly
89. **Ascend Broker Portal Users**: Fill out your clients address



Primary Care Provider

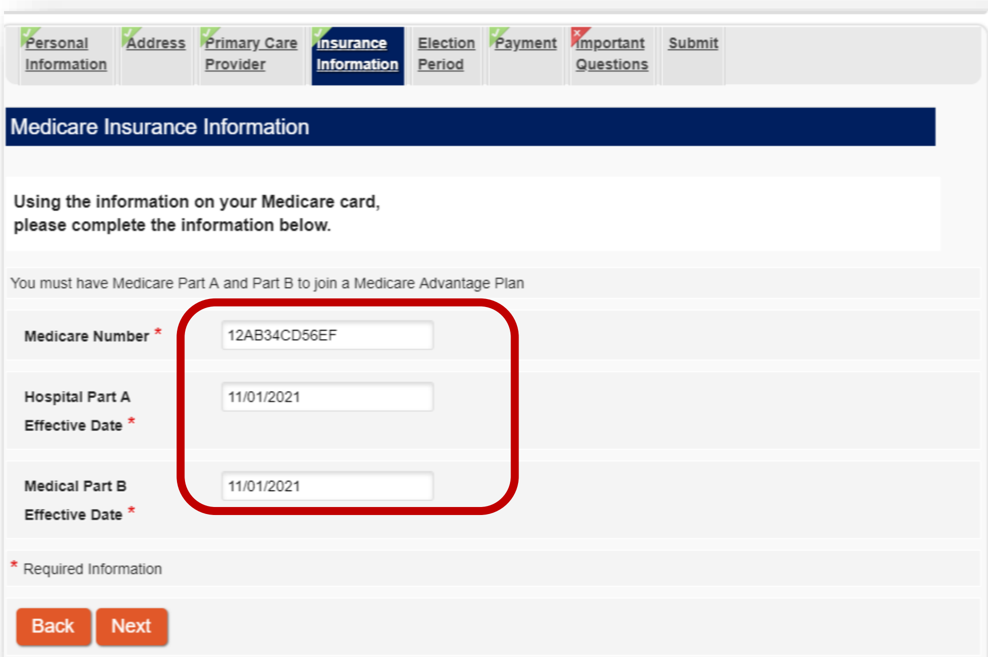
90. If you used the assisted shopping tools and selected a PCP, the PCP should transfer over to the application
91. If you didn't use the assisted shopping tools, you can enter in your client's PCP
    a. **Note**: Only MD's and DO's will be printed on the members ID Card. They can still see PA's, NP's etc., they just wont populate on their ID cards
92. If someone doesn't have a PCP and you want to look-up plan providers you can click on "**Provider Lookup**" to look up providers on our website

93. Next, click on "**Yes**" or "**No**" radio button if your client is current patient of that PCP
94. Enter the location of where you client sees that provider



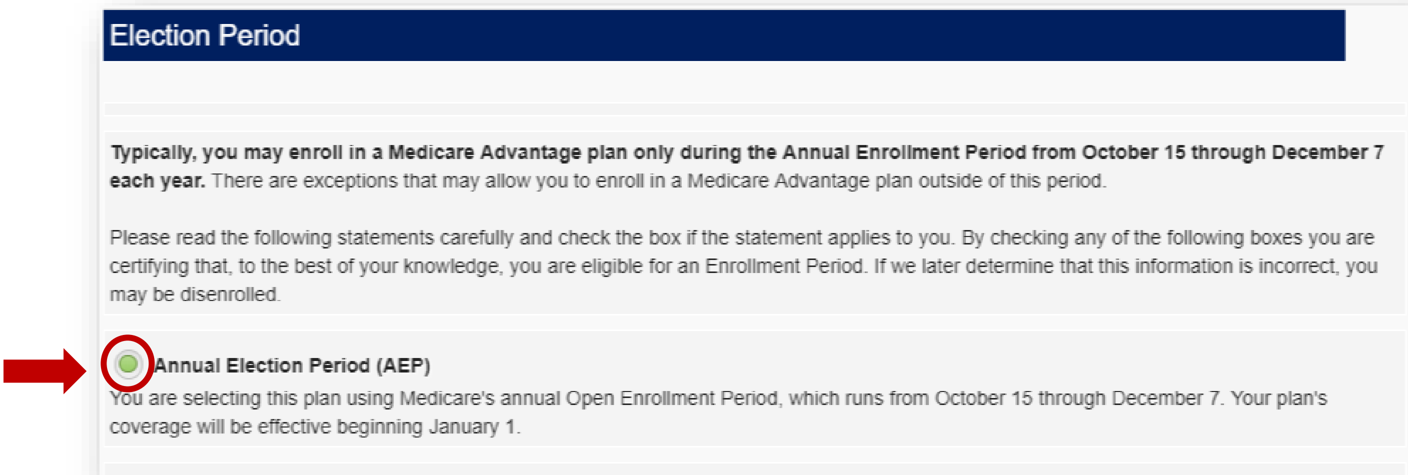
Insurance Information

95. **AMA Users:** Verify the MBI and Medicare Effective Dates transferred over correctly
96. **Ascend Broker Portal Users**: Fill out your clients MBI and Medicare Effective Dates
    a. **Note**: Be sure that you are re-reading the MBI back to your client to make sure you have entered it correctly
    b. If the MBI is not entered correctly, the application will pend for invalid MBI and we will send an "RFI" letter requesting a valid Medicare Number



Election Period

97. Click the radio button next to appropriate election period they are using to enroll
    a. As of 12/08 there will be 5-Star Button
    b. As of 01/01 there will be a MA-OEP Button

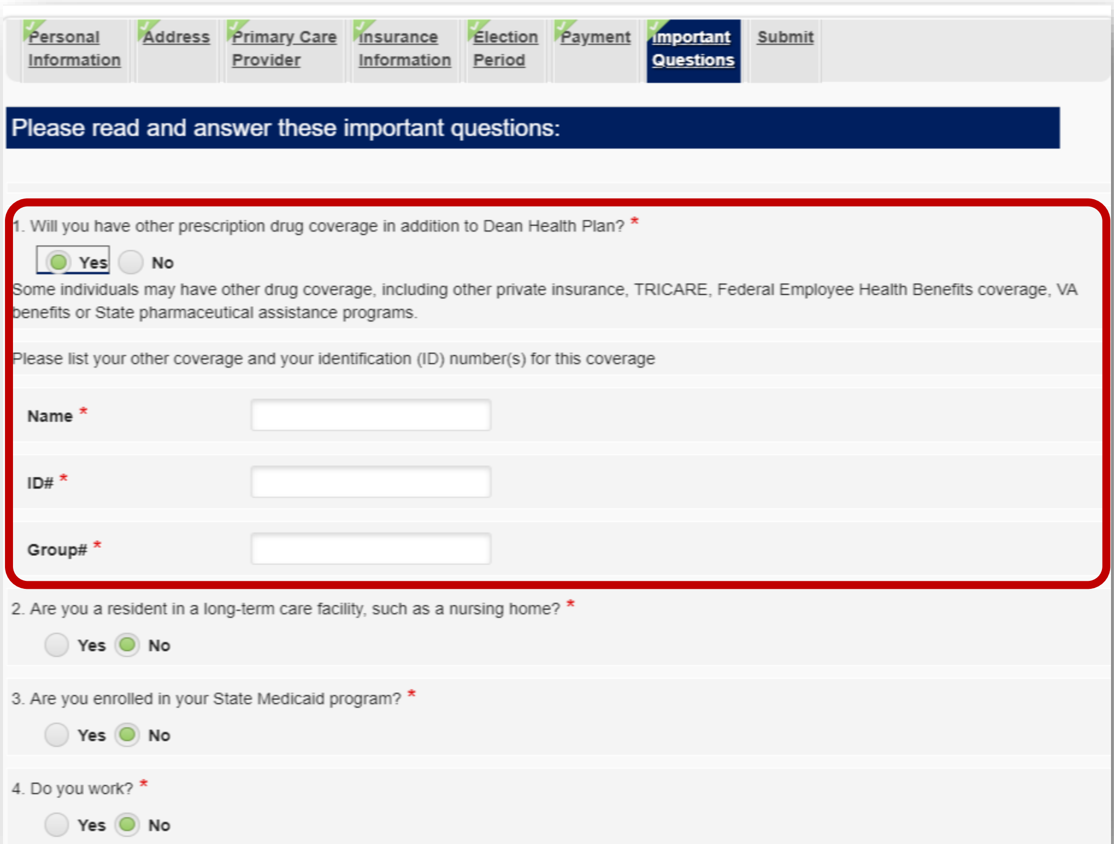


Payment

98. Click the appropriate ratio button for the payment option that your client would like to do
    a. They can either choose direct bill or SSA or RRB Deduction
        i. **Direct Bill:** We bill on the 10th of each month for the next month. We would bill January's invoice on December 10th
        ii. **SSA or Railroad Deduction:** Let your client know that they may get billed until Social Security/Railroad Retirement Board approves their deduction
    b. Unfortunately, we are unable to take ACH account information via the Ascend Mobile App or the Agent Portal
        i. Your client can choose the ACH option on their first invoice or they can fill out the ACH form and mail it in or you can fax the form to 608-252-0801
        ii. We pull on the 23rd of each month unless the 23rd lands on a weekend or holiday then we pull the next business day
        iii. We would pull January's premium on December 24th

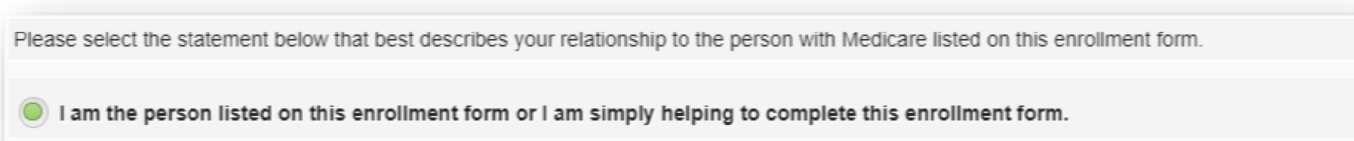
Important Questions

99. Go through the list of important questions
100. If you answer "**Yes**" to any of the questions, fill out the additional information that is being requested

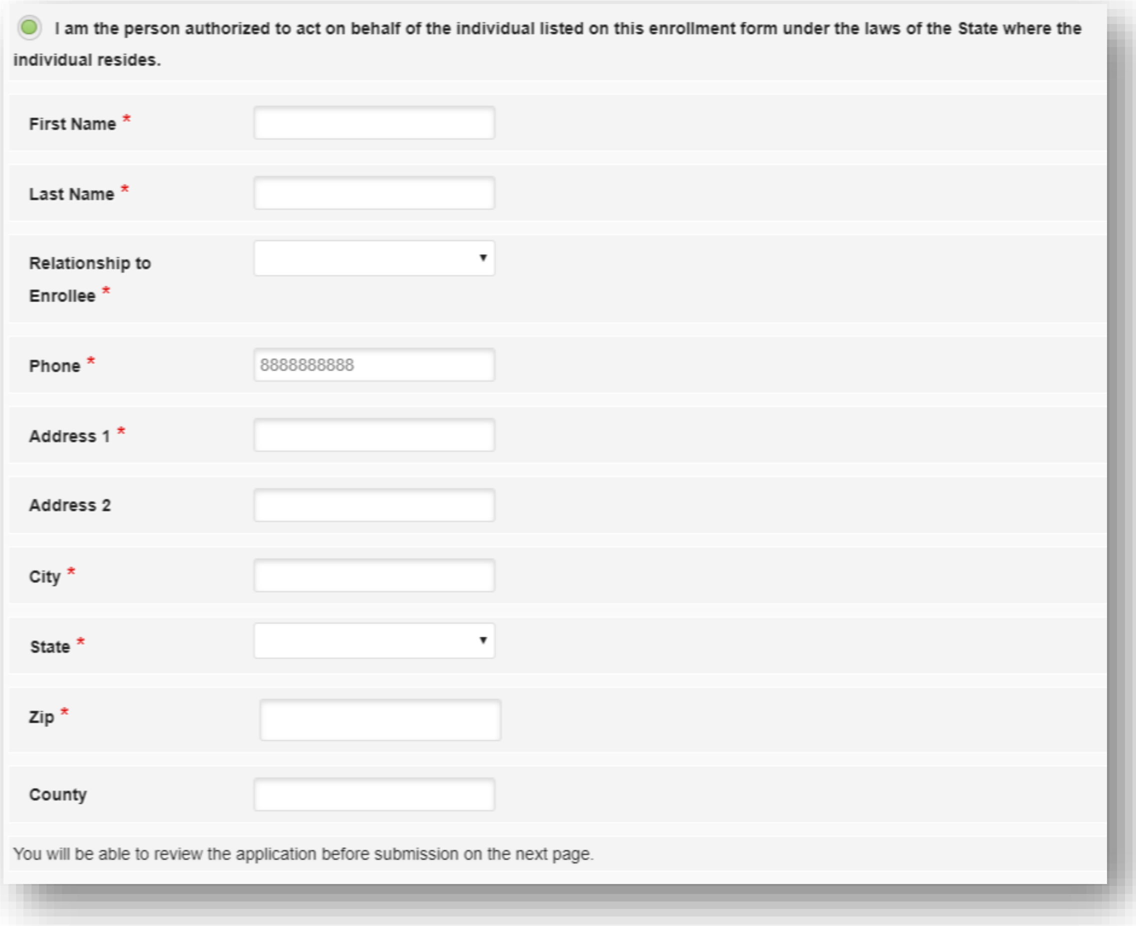


Submit

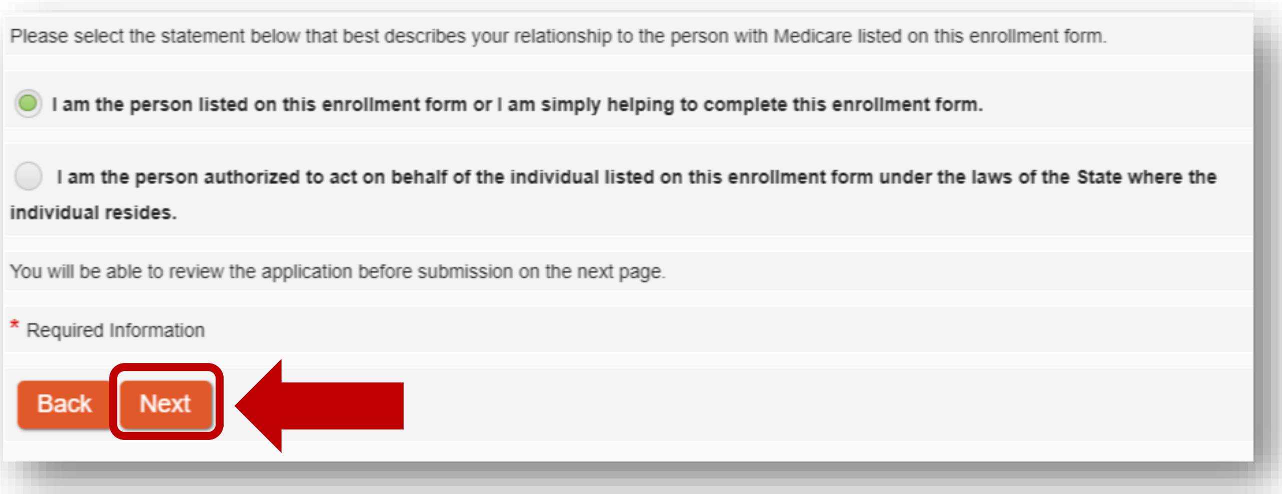
101. Have your client read the disclaimers themselves or read out loud to your client
102. Have your client click the ***"I am the person listed on this enrollment form or I am simply helping to complete this enrollment form***."- This is their "electronic signature"



   a. If the person is enrolling the POA, fill out the ***"I am the person authorized to act on behalf of the individual listed on this enrollment form under the laws of the State where the individual resides"***

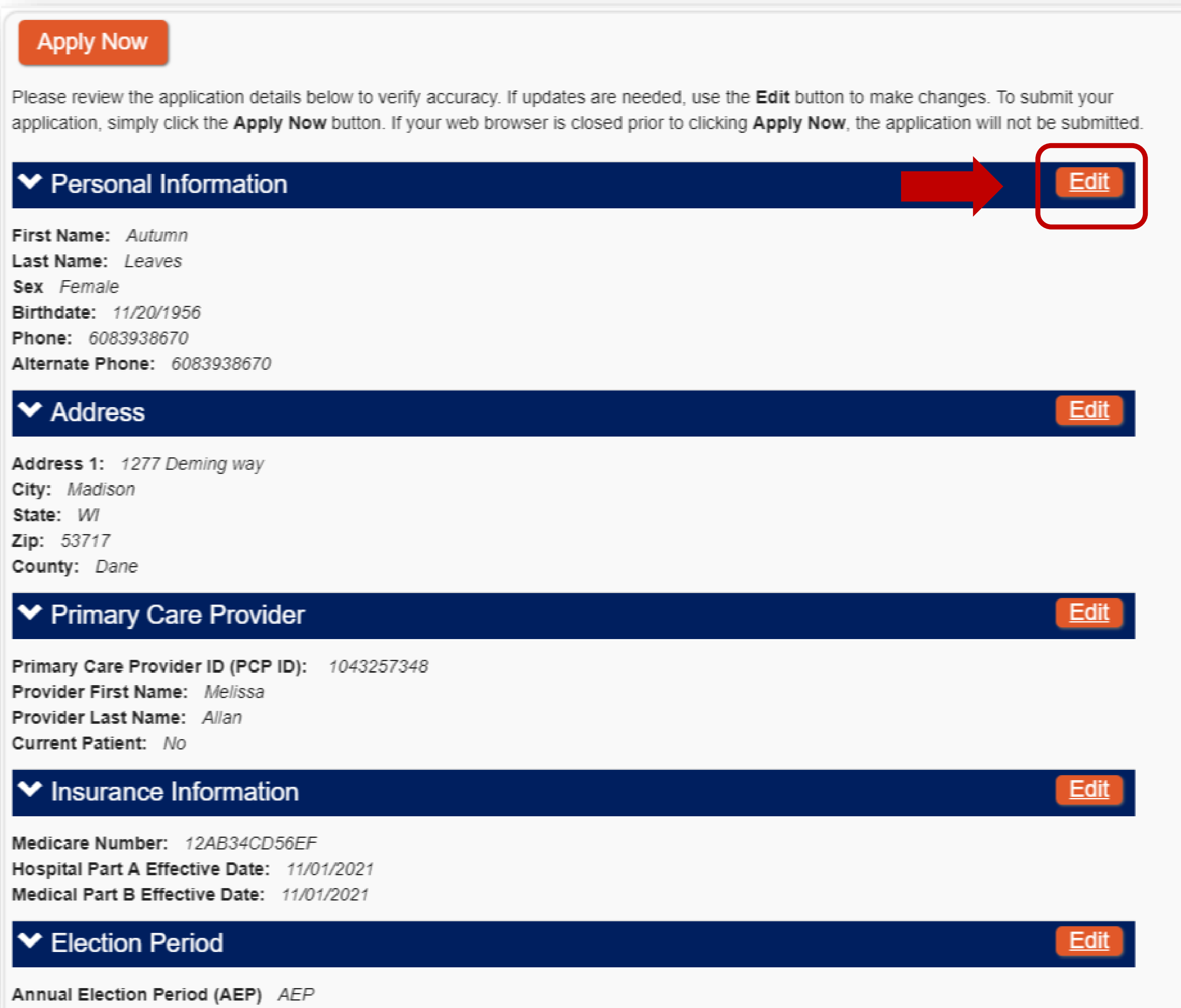


103. Next, Click on the “**Next**” button



Application Summary

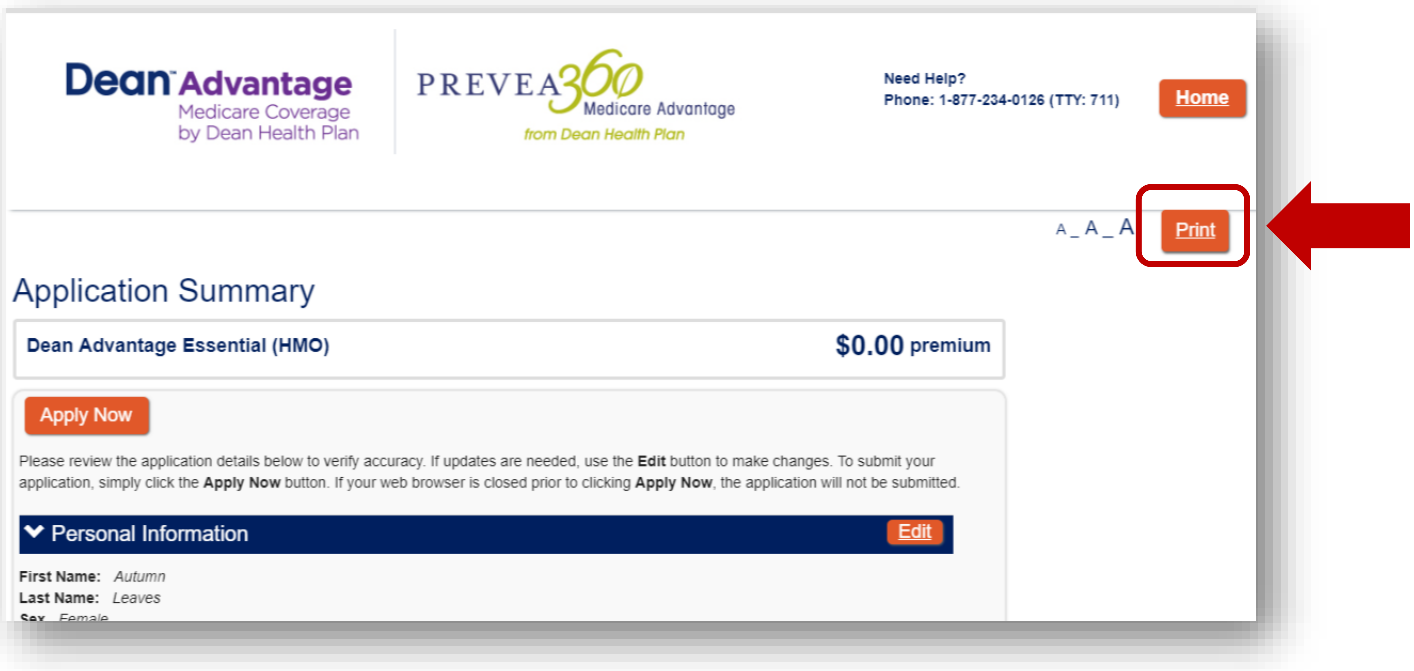
104. This section allows you review the application to make sure everything was entered correctly
105. If you need to correct anything, you can click on the "**Edit**" button



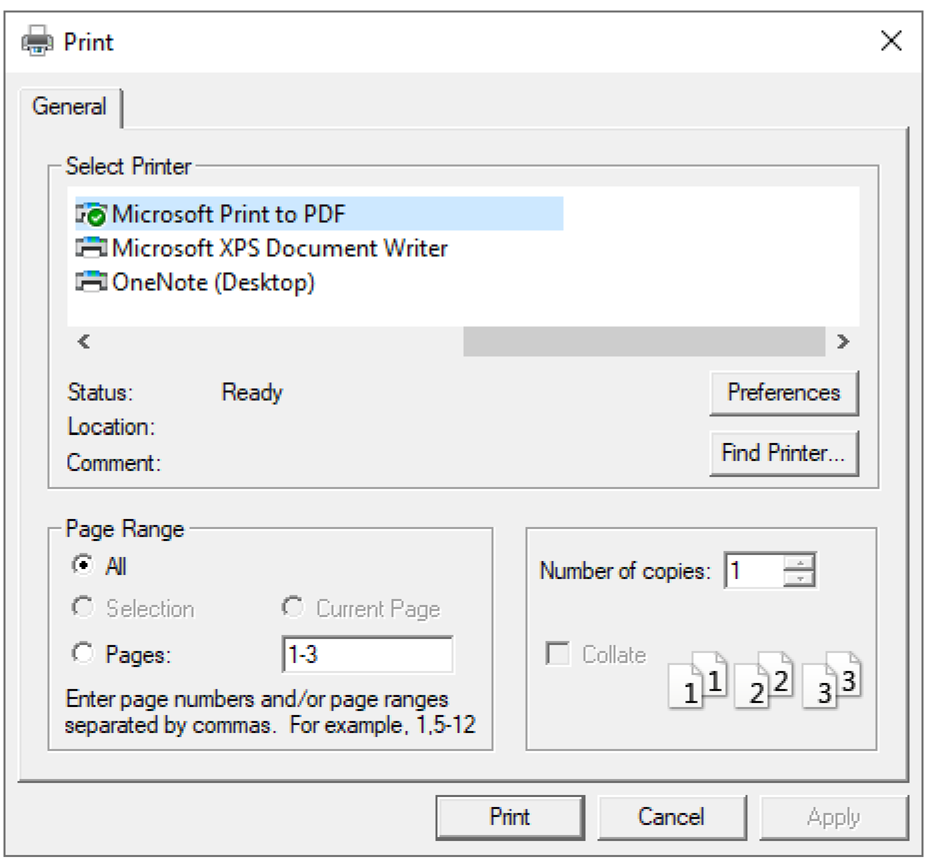
106. It will jump you back to that section to edit and then you can go back to the "**Submit**" tab to review your work again

Saving PDF of the Application

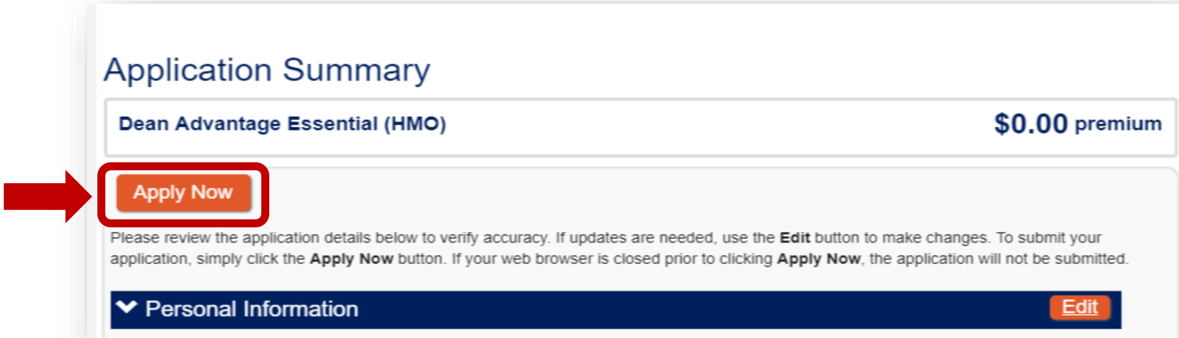
107. Click on the "**Print**" button



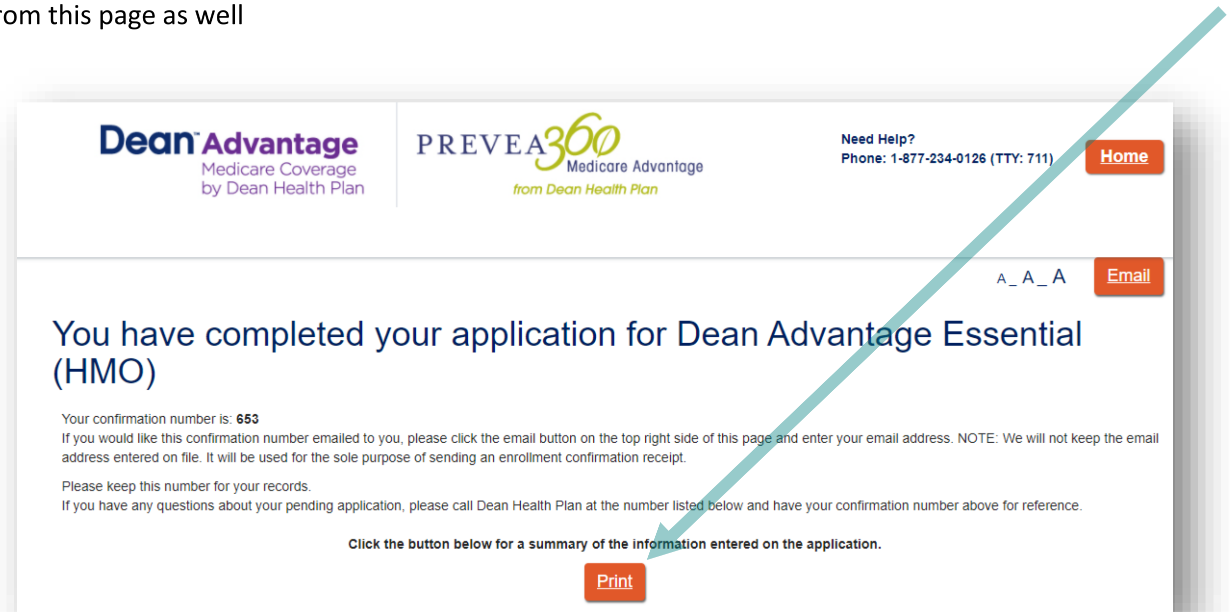
108. You can either print it as a PDF and save it to your documents or print off actual paper copy

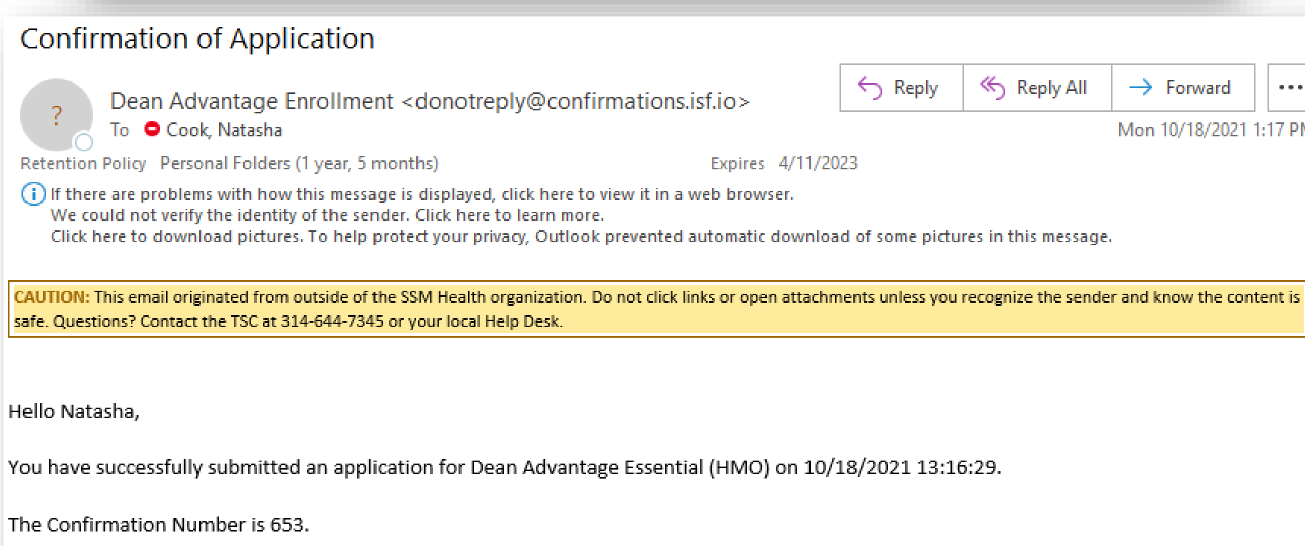


109. When everything is entered in accurately, click on the "**Apply Now**" button



110. After you submit the application you will get confirmation number and your client will get a confirmation email notification as well. If you forgot to save the application from the Application Summary page, you can **print** it from this page as well

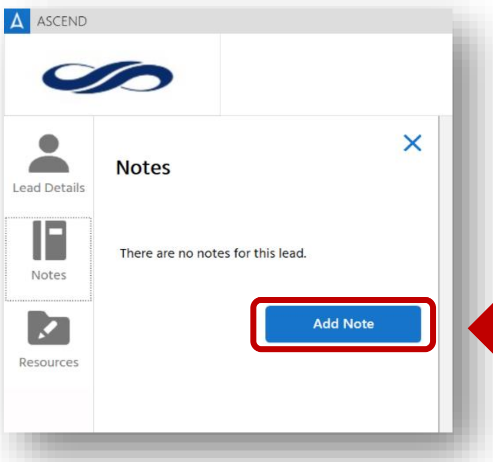




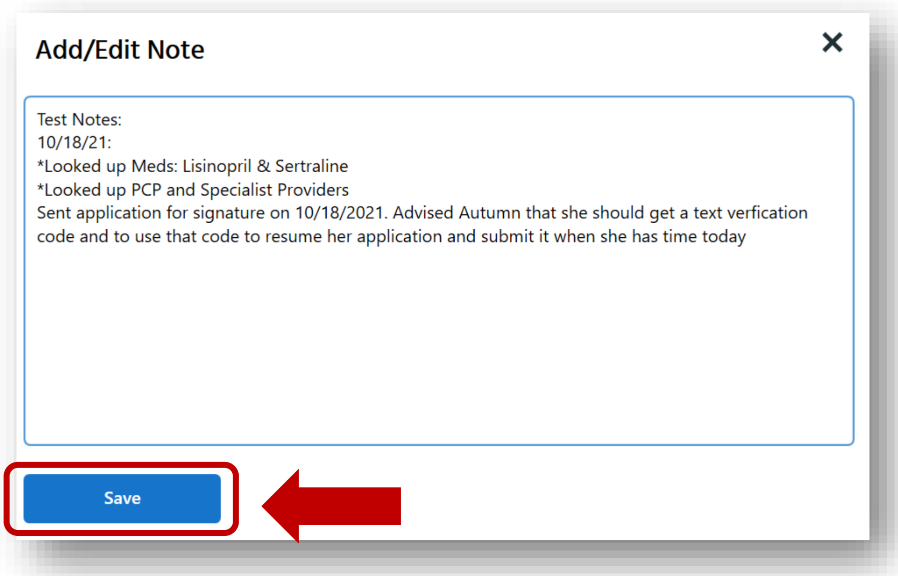
Adding Notes to your Meeting or Lead

111. If you would like to add notes from your meeting, click on the "**Notes**" button on the left hand side before ending the meeting

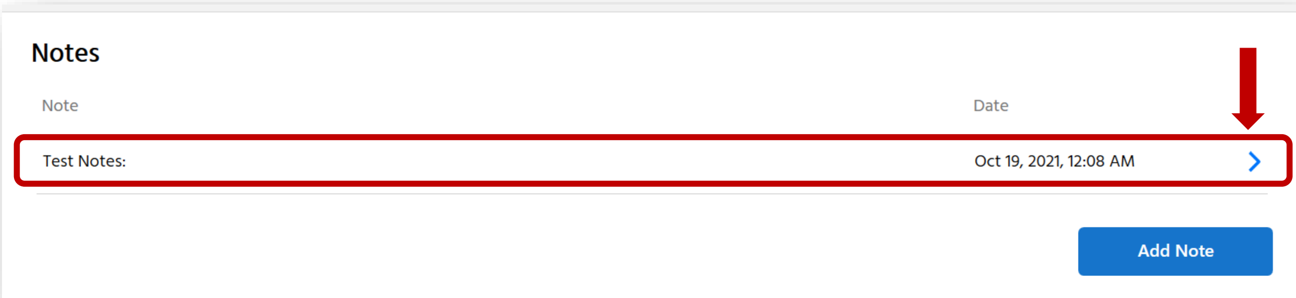
112. Next, click on the "**Add Note**" button



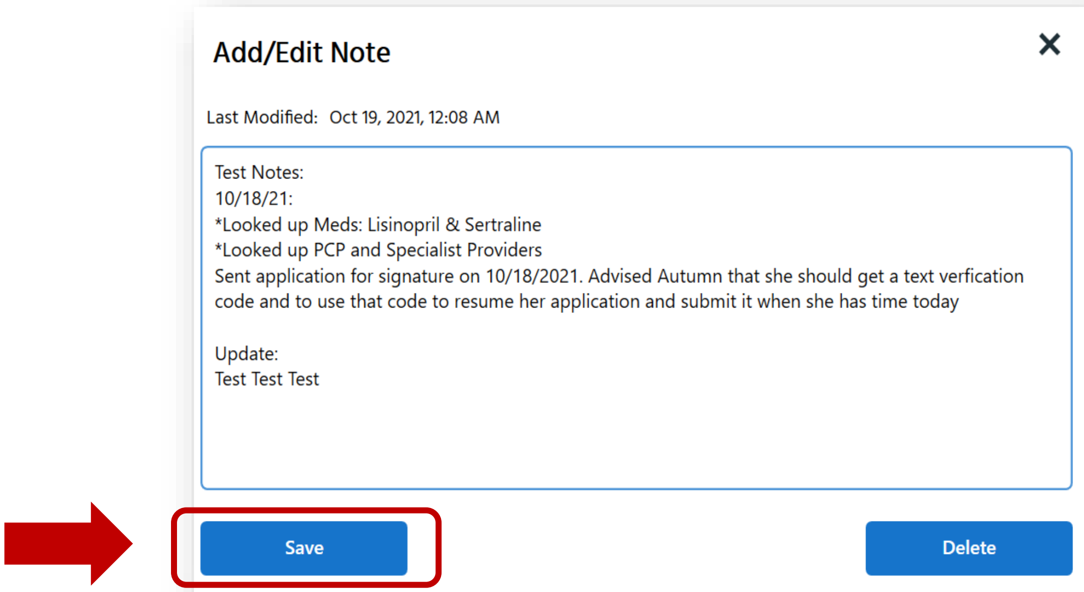
113. Add the notes you want for your meeting and then click the "**Save**" button



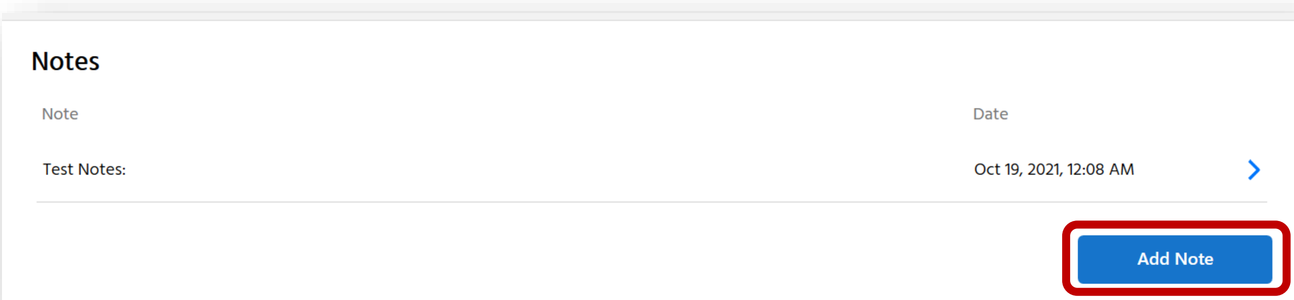
114. If you go back into your Lead, scroll down to the “**Notes**” Section you will see the notes you entered. If you click on the “>” button you can edit your notes.



115. Make edits to your notes and then click on the “**Save**” button

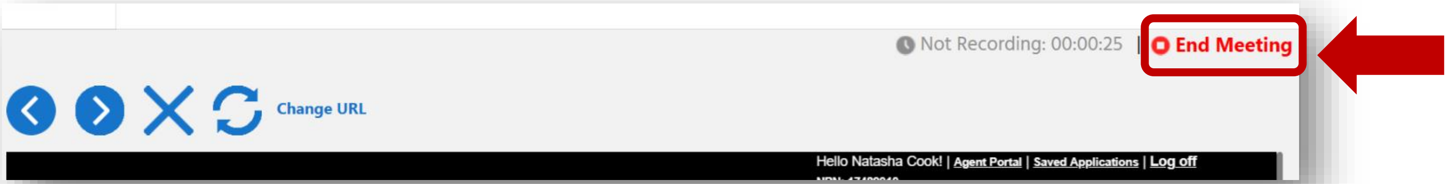


116. You can also add additional notes by clicking on “**Add Note**” and click “Save” like seen in previous steps

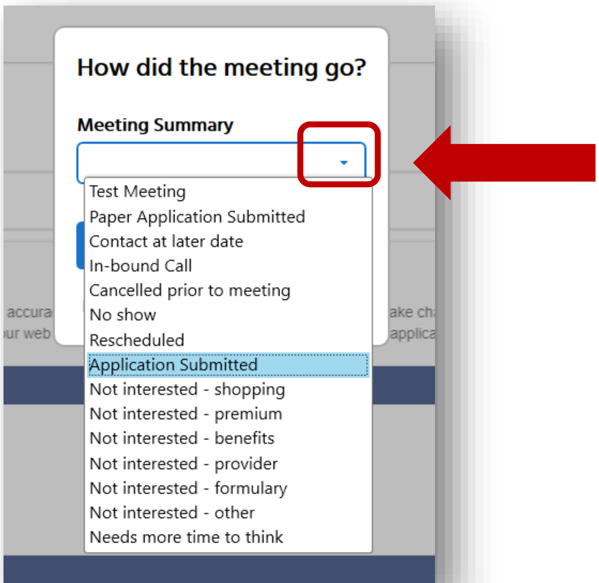


Dispositioning the Meeting

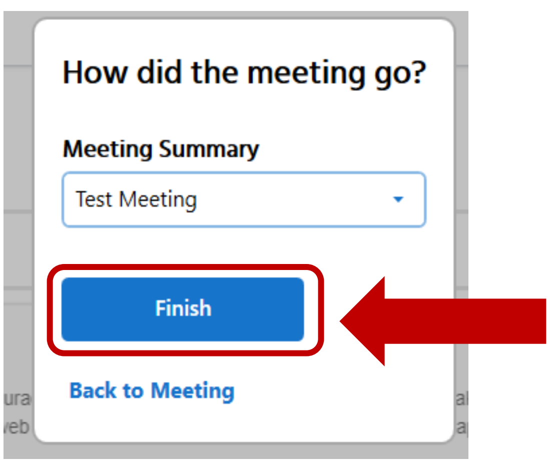
117. Once the meeting is completed, click on the "**End Meeting**" Button



118. Click on the drop down arrow and choose the most appropriate disposition for the meeting



119. After you have you chosen your disposition, click on the "**Finish**" button

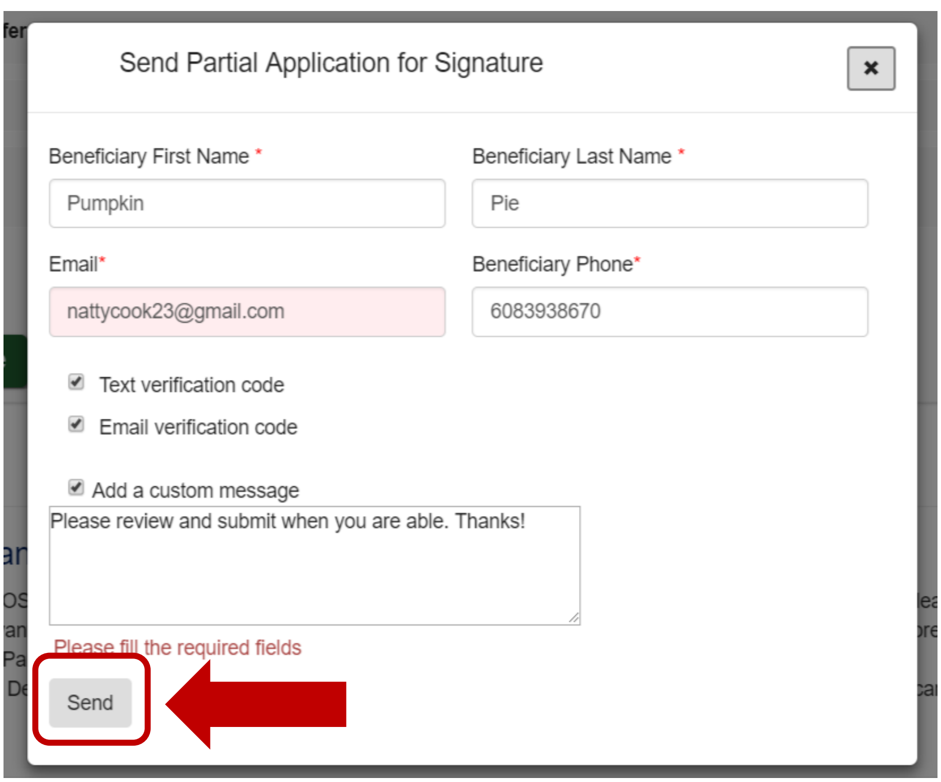


Send for Signature

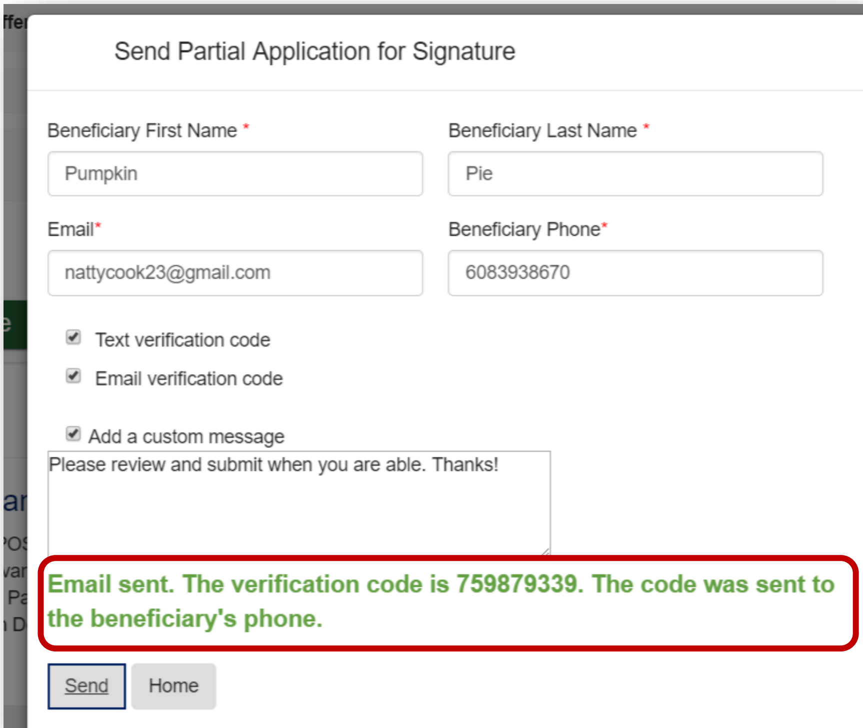
This feature will allow you to send a partial application to your client for them to resume and submit applications on your behalf. This feature is great to use to during COVID-19 if you have already discussed products over the phone and they just need to sign the application

120. Click on the "**Send for Signature**" button

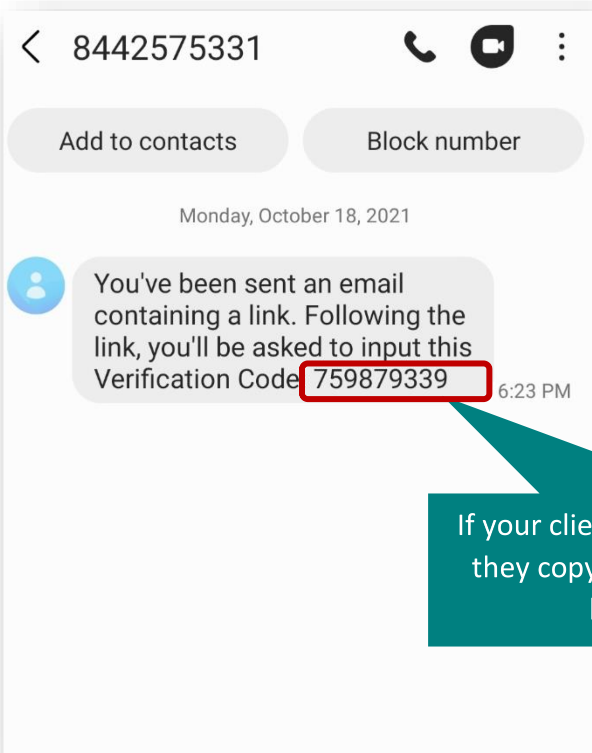
121. Make sure all the required fields are filled out. You can also add a custom message (this is optional). Once you have all the information filled out, click on the "**Send**" button



122. Your client will get a text notification and email with the below verification code

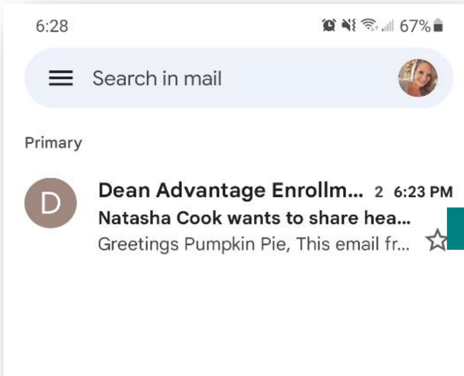


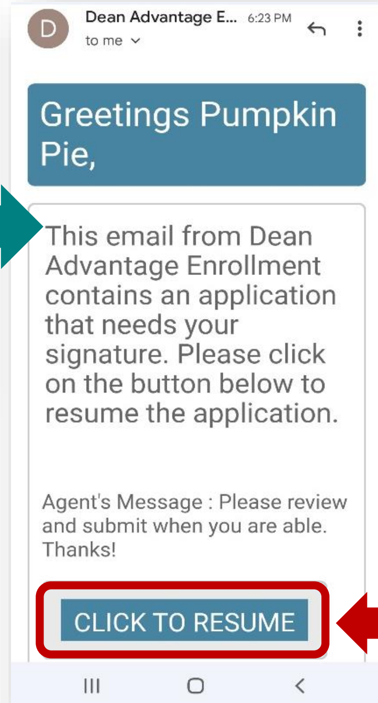
123. Below is what the text message looks like



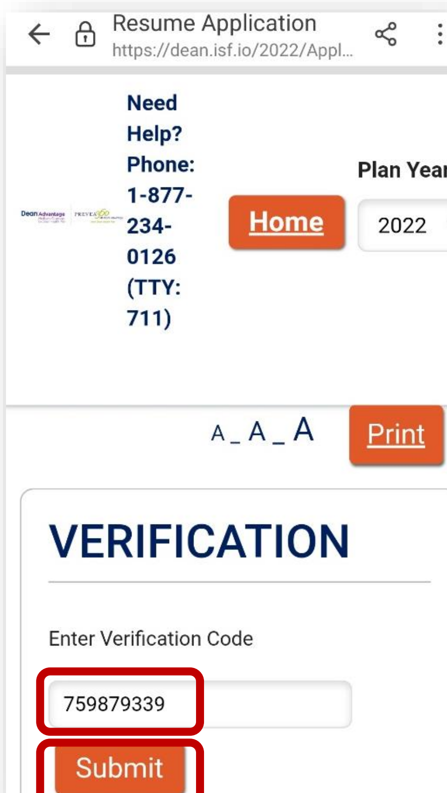
If your client is using a Smart Device, it’s easy if they copy the verification code from the text before going to their email

124. Your client will then want to go to their email and click on the enrollment email
125. They will then click on the "**CLICK TO RESUME**" button

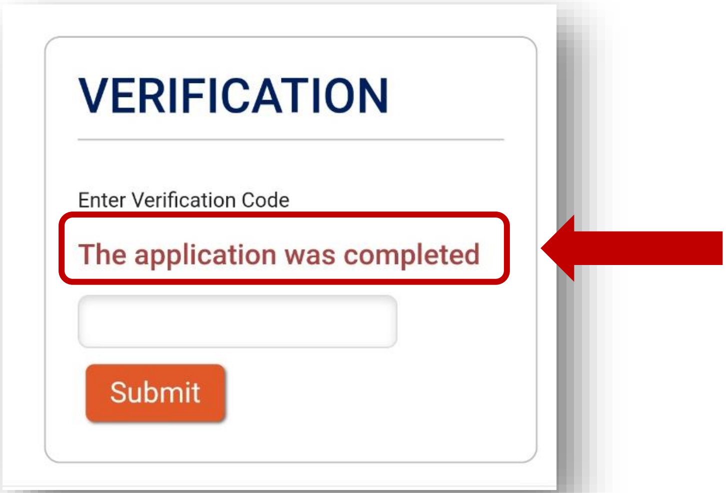




126. Your client will then enter the verification code from their text into the Verification Code Field and then click on the "**Submit**" button



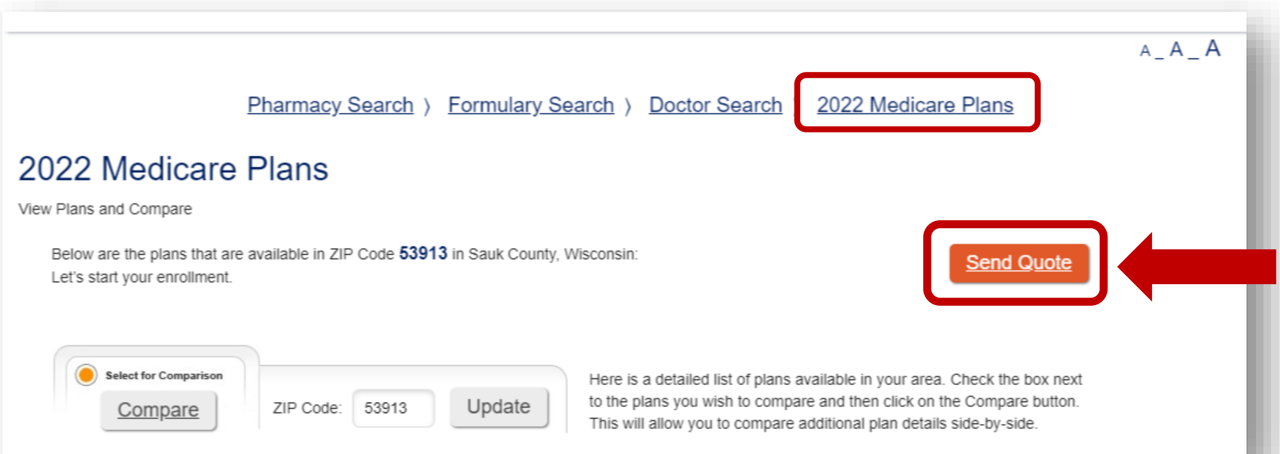
127. If your client has submitted the application and tries to enter the verification code again, they will get this error message:



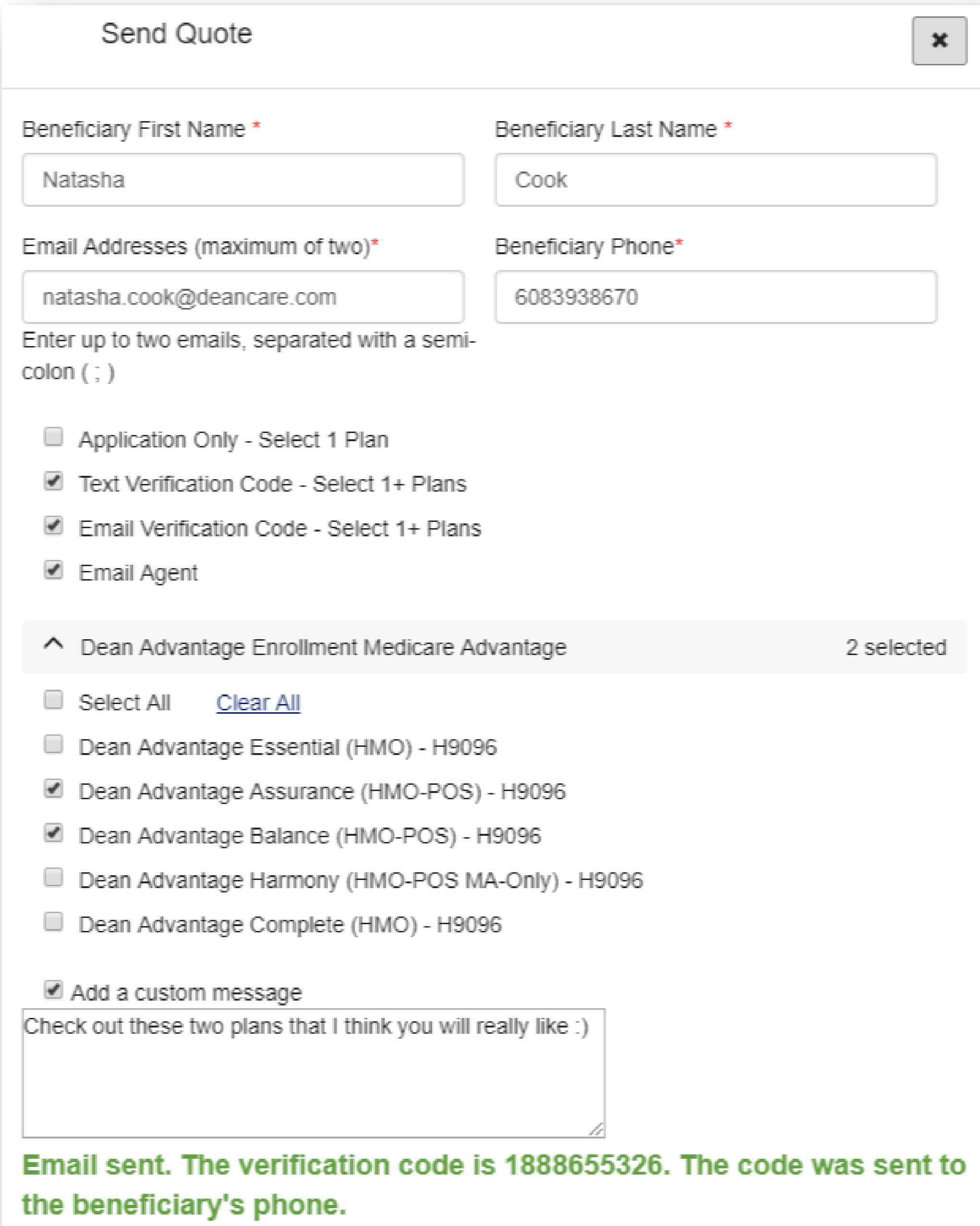
Send a Quote

Send a quote is another feature that is great to use during COVID-19 as well, if you have someone who is nervous to meeting in-person or god forbid you have been close contact and have to quarantine but still want to serve your clients.

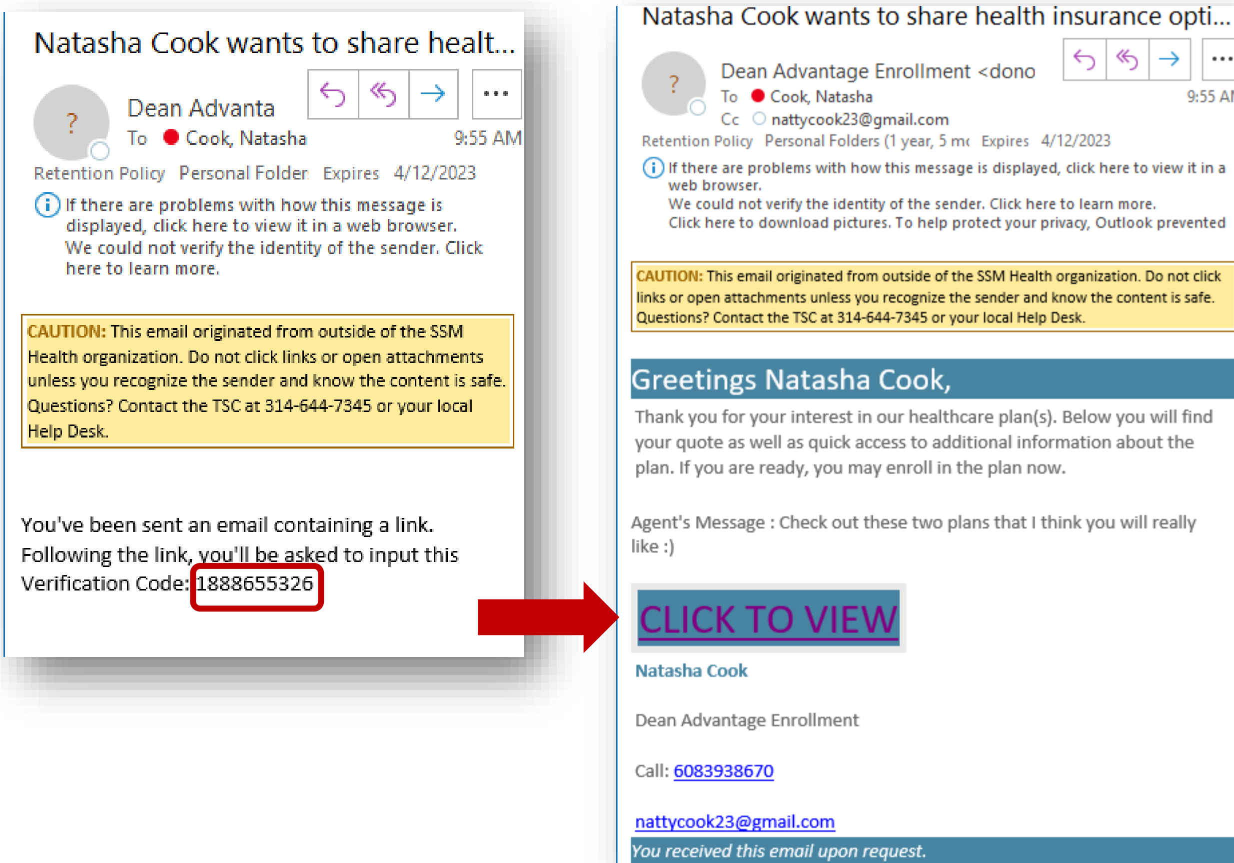
128. **AMA or Ascend Broker Portal Agents**: Click on the "**2022 Medicare Plans**" tab and click on "**Send Quote**" button



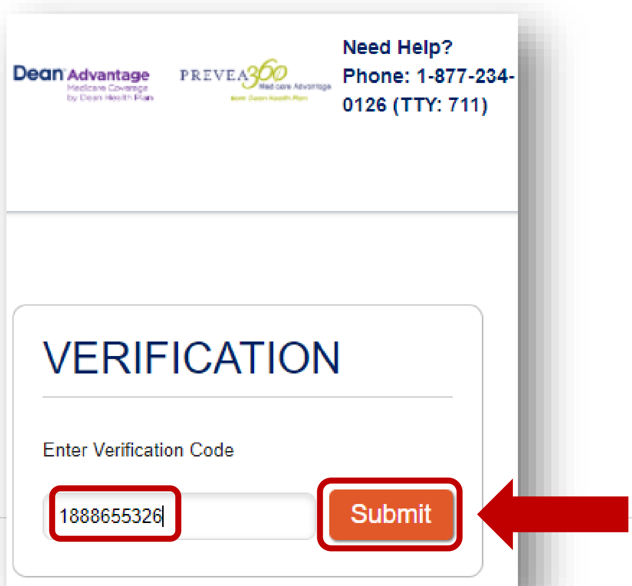
129. Fill out your clients information and the plans you want your client to review. Once all the information is filled out, click on the "**Save**" button



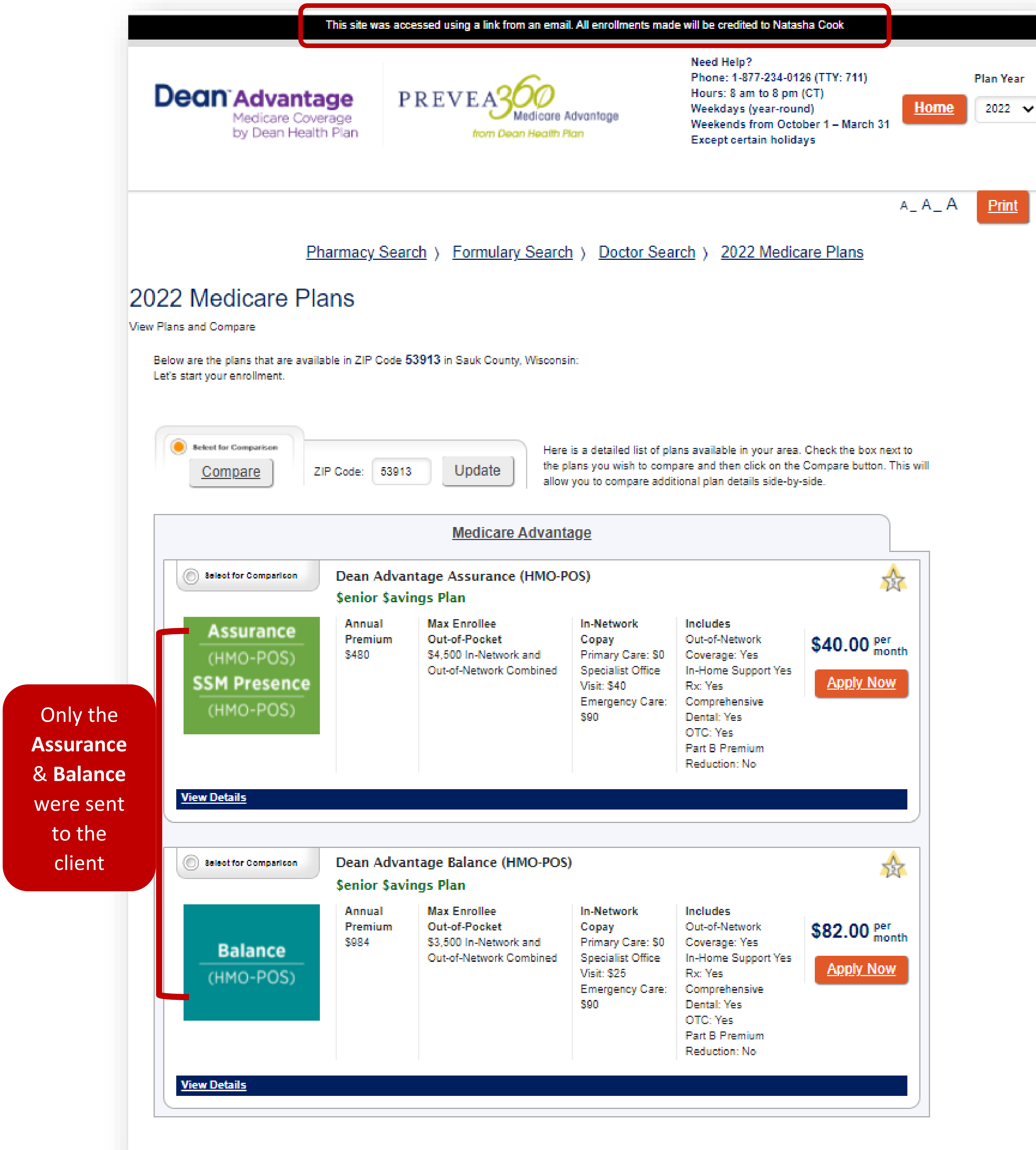
130. Similar to the Send for Signature feature, your client will get a verification code that they will enter into the quote



131. Your client will click on the "**CLICK TO VIEW**" button and then enter their verification code from their email or from their text. Once that is entered they will want to click on the "**Submit**" button

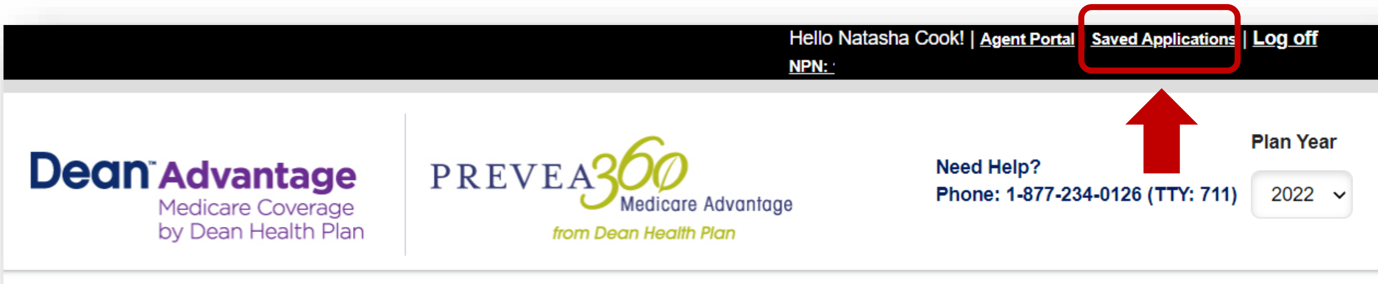


132. Your client will only see the plans that you have sent to them and if they decide to enroll, the application will be credited to you



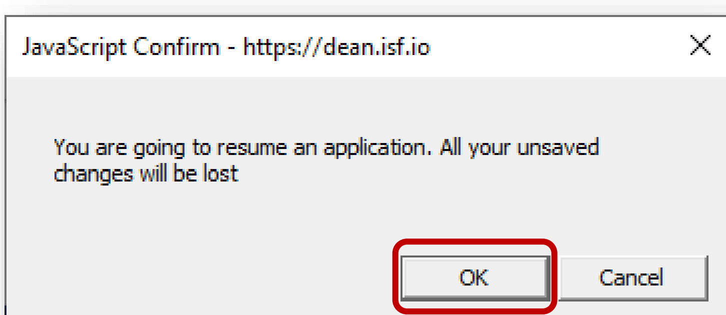
Saved Applications

133. At any point you can save an application and come back to it later. All "Saved" and "Send for Signature" applications will be located in your "**Saved Applications"** side of the Agent Portal
134. Until your client has submitted the application, the application will sit in your saved applications
    a. Saved applications will be saved for 7 days. If you or your client doesn't submit the application within the 7 days, the application will no longer be saved and you will have to do another application
135. From the Ascend Broker Portal, at the top right hand corner click on the "**Saved Applications**" link



136. From here you will see all your saved and sent for signature applications

137. You can edit your application by clicking "**Edit**" and this will allow you to resume the application. You will get the below error message if you have any other work or a current application open that's is not saved. Click on "**OK**" if you would like to continue



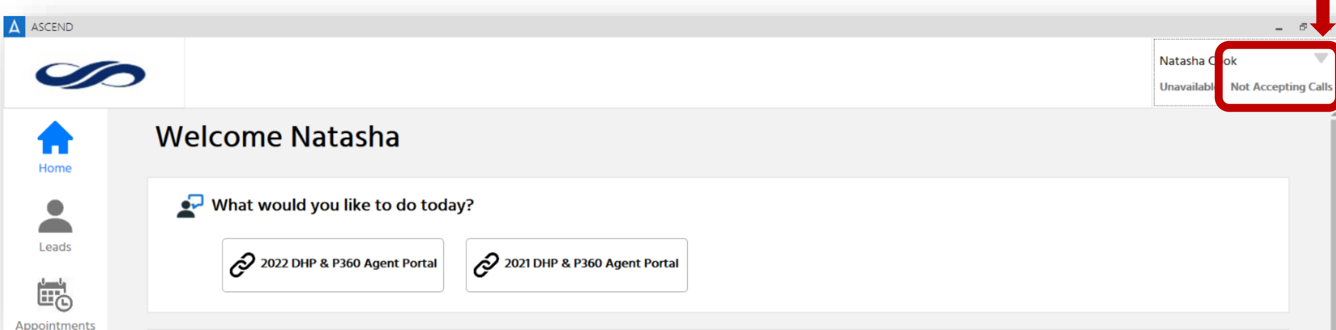
RATE (Remote Agent Telephonic Enrollment)

Remote Agent Telephonic Enrollment (RATE) is a powerful enrollment tool within the Ascend Mobile Application (AMA) that enables you to enroll your clients by phone.

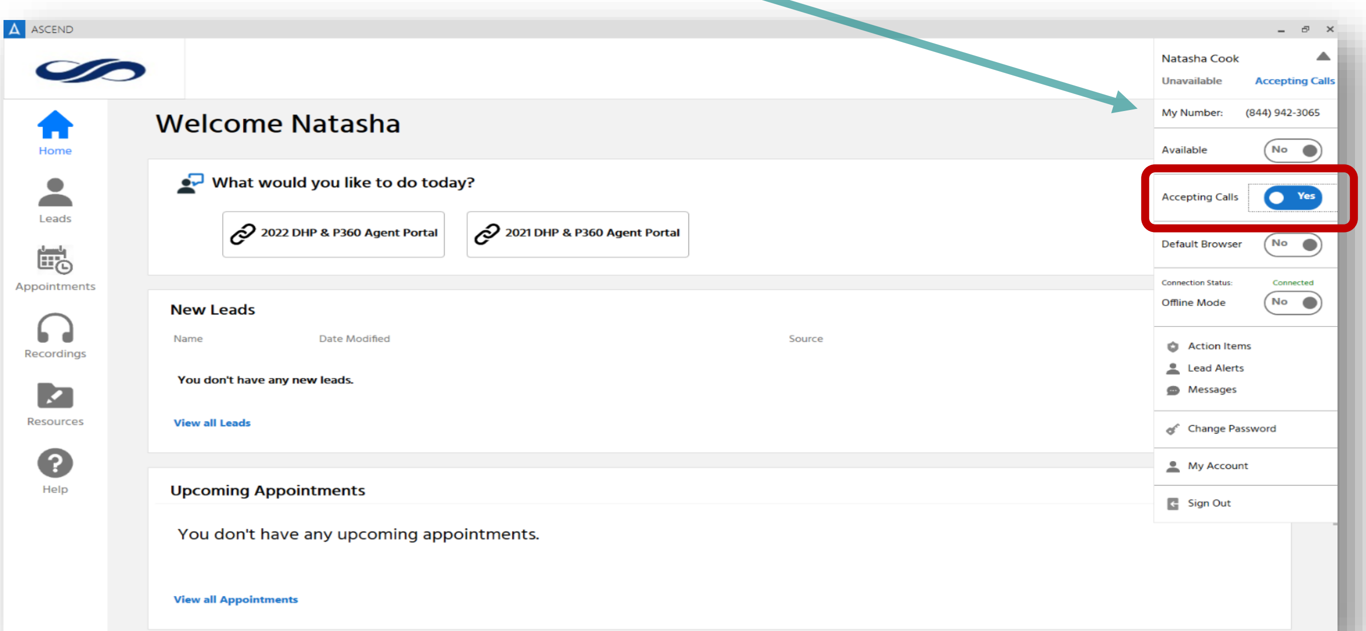
General Background on RATE:

- To be compliant with CMS, these enrollments **must occur through AMA**
- Each agent will be given a unique RATE phone number to share with their prospects
- The phone call can only be answered through AMA
- You must be logged into AMA to receive a RATE call
- You need to know when a prospect will be calling so you will be prepared to receive the call
- You cannot receive a RATE call if you are in a meeting already

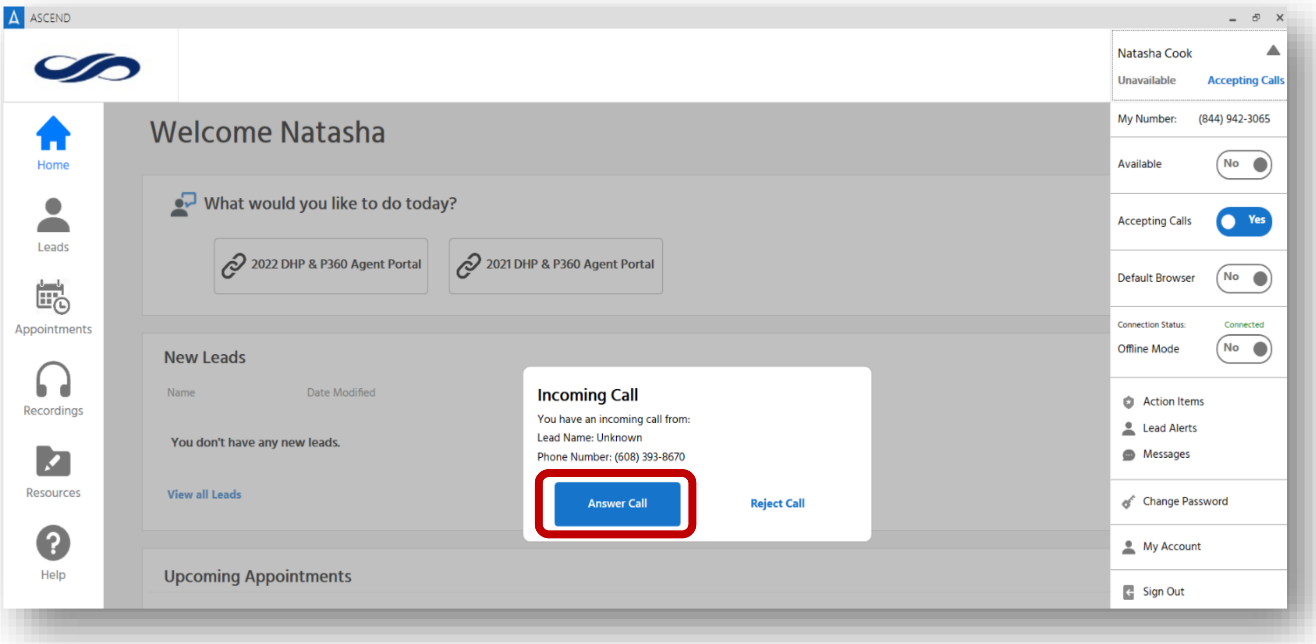
138. From the Welcome/Home Page, click on the down arrow above **"Not Accepting Calls"** next to your name



139. Toggle from **"Accepting Calls"** from **"No"** to **"Yes"**
    a. **Note:** If you don't have a RATE phone number or get an error message reach out to DHP.MAPDSales@deancare.com to have your role status updated



140. When a prospect calls your RATE line, your device will ring like a phone and you will tap or click to answer the call



141. **Other information on RATE**

   a. Your prospect will hear you through your device and you can complete the enrollment as normal in AMA

      i. Use the CMS approve scripting available in the "**Resources**" Folder

         1. See steps under the "Resources" Section on how to access the CMS approved scripting

      ii. If you have a desktop, make sure that you have microphone to capture your recording

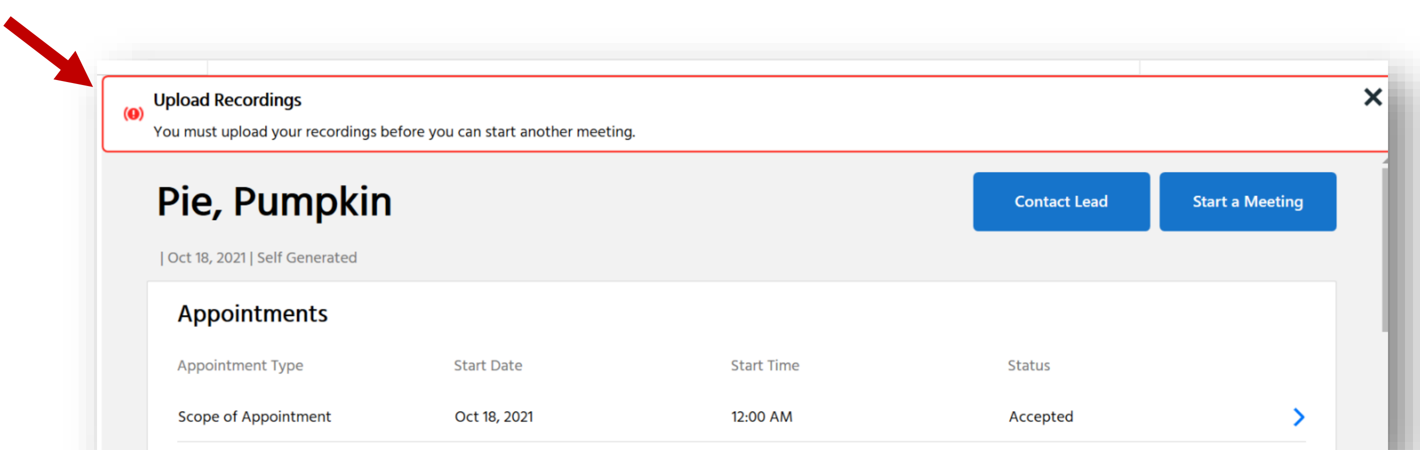
   b. You can receive a RATE call at any time of the day

   c. What if you get disconnected from the prospect?

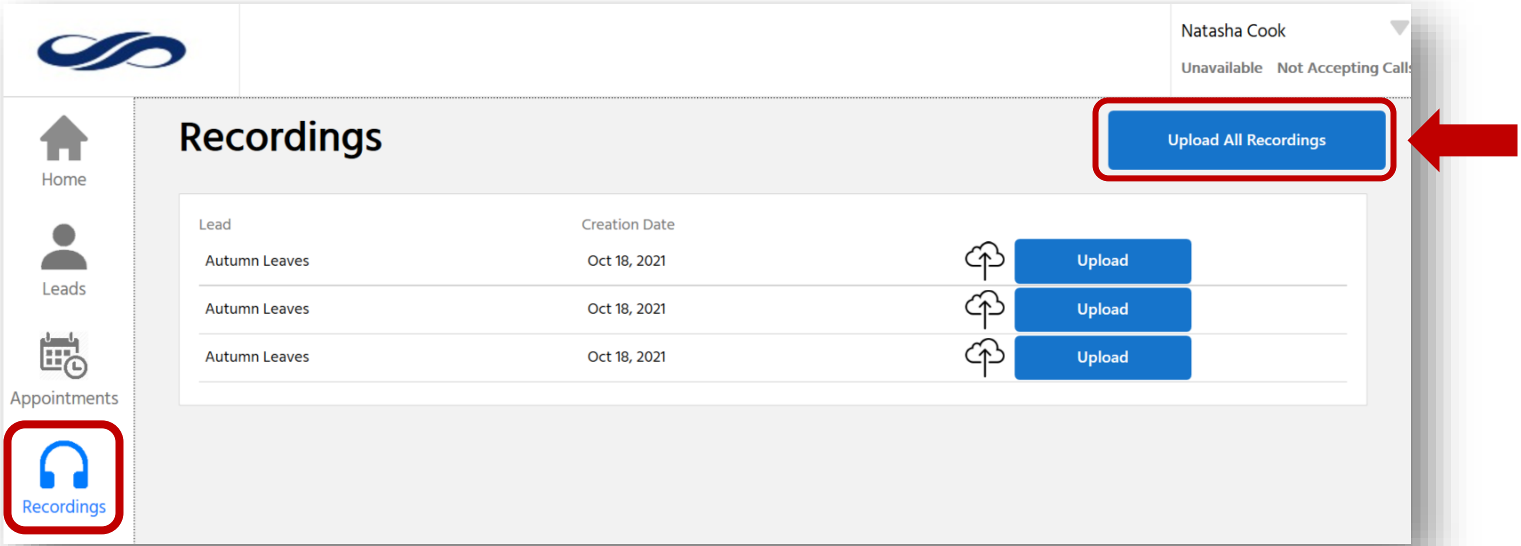
      i. RATE calls must be completed on an inbound call. They must call you back on the RATE number to complete the enrollment

Recordings

142. You will have to upload your meetings regularly and you may get the below error message when you try to start a new meeting and you need to upload your recordings

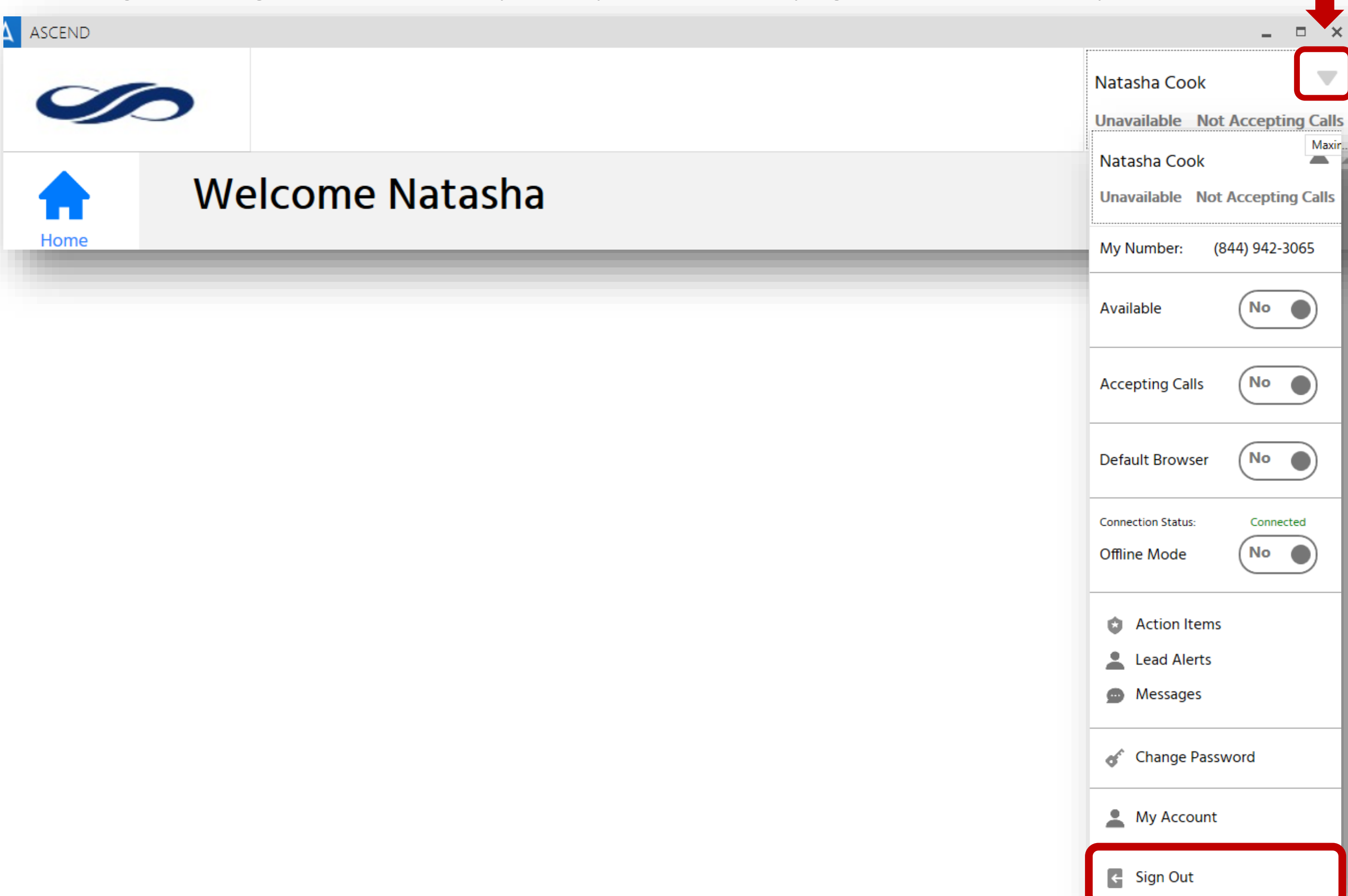


143. Go to the "**Recordings**" Button from the Welcome/Home Page, from here you will see your recordings that you need to upload. You can chose to upload one at time or click the "**Upload all Recordings**" button



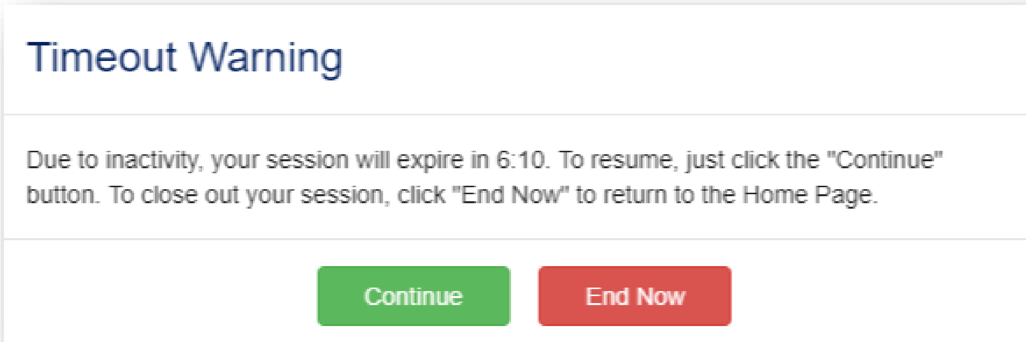
Signing Out

144. To make sure that you don't have any error or timeout session issues, its best to sign out after each session by clicking on the "**Sign Out**" button from your drop down on the top right hand corner under your name



Timeout Session Warning

145. Here is an example of what the timeout session notification error message looks like

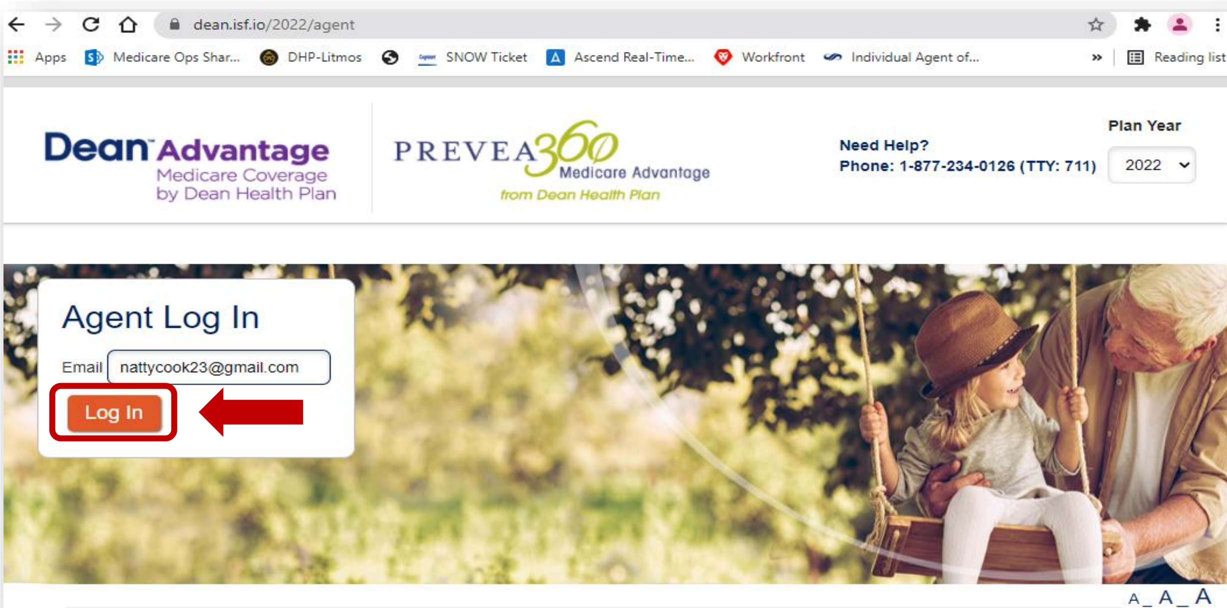


AQE: Ascend Agent Portal

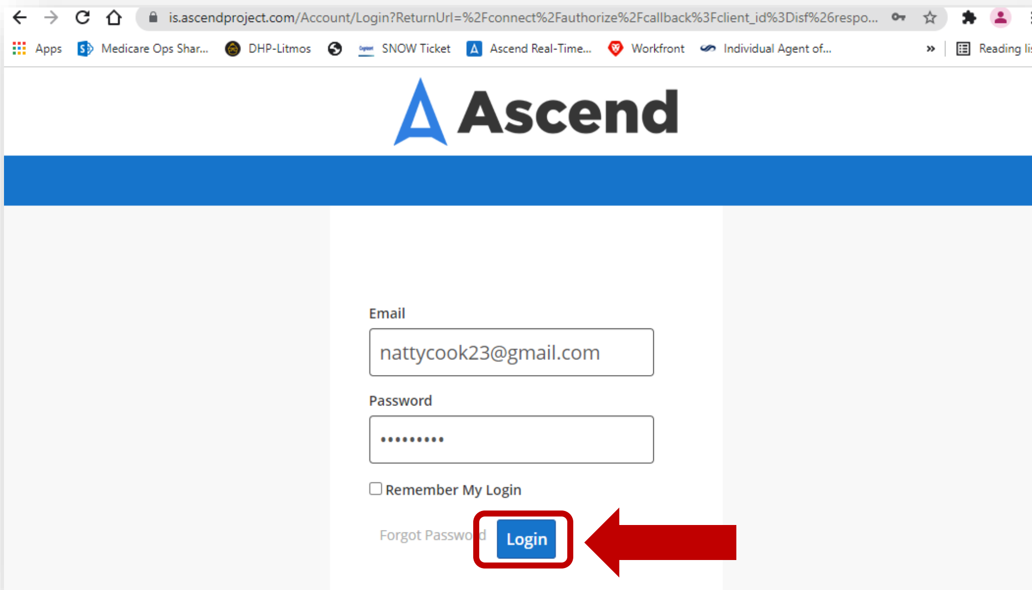
The Ascend Agent Portal allows you to quote and submit apps, but you can't track your leads, send an eSOA, record meetings, or take a telephonic application. It's more of a slimmed down version of AMA. You can still send quotes and send electronic applications for completion and submission. You can also check application status and commission status for applications submitted through any of the Ascend enrollment mechanisms (AMA or Ascend Agent Portal)

Logging into Ascend Agent Portal

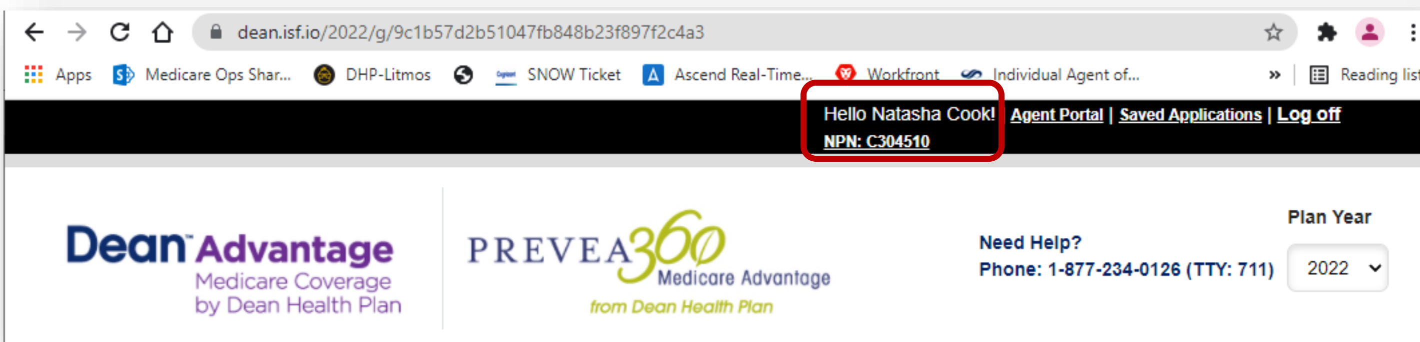
146. URL link is https://dean.isf.io/2022/agent
147. Enter your email and click the "**Log In**" button



148. The site will "revert" you to Ascend, enter your Ascend credentials and click the "**Login**" button
    a. Your username and password will be the same for all Ascend Features

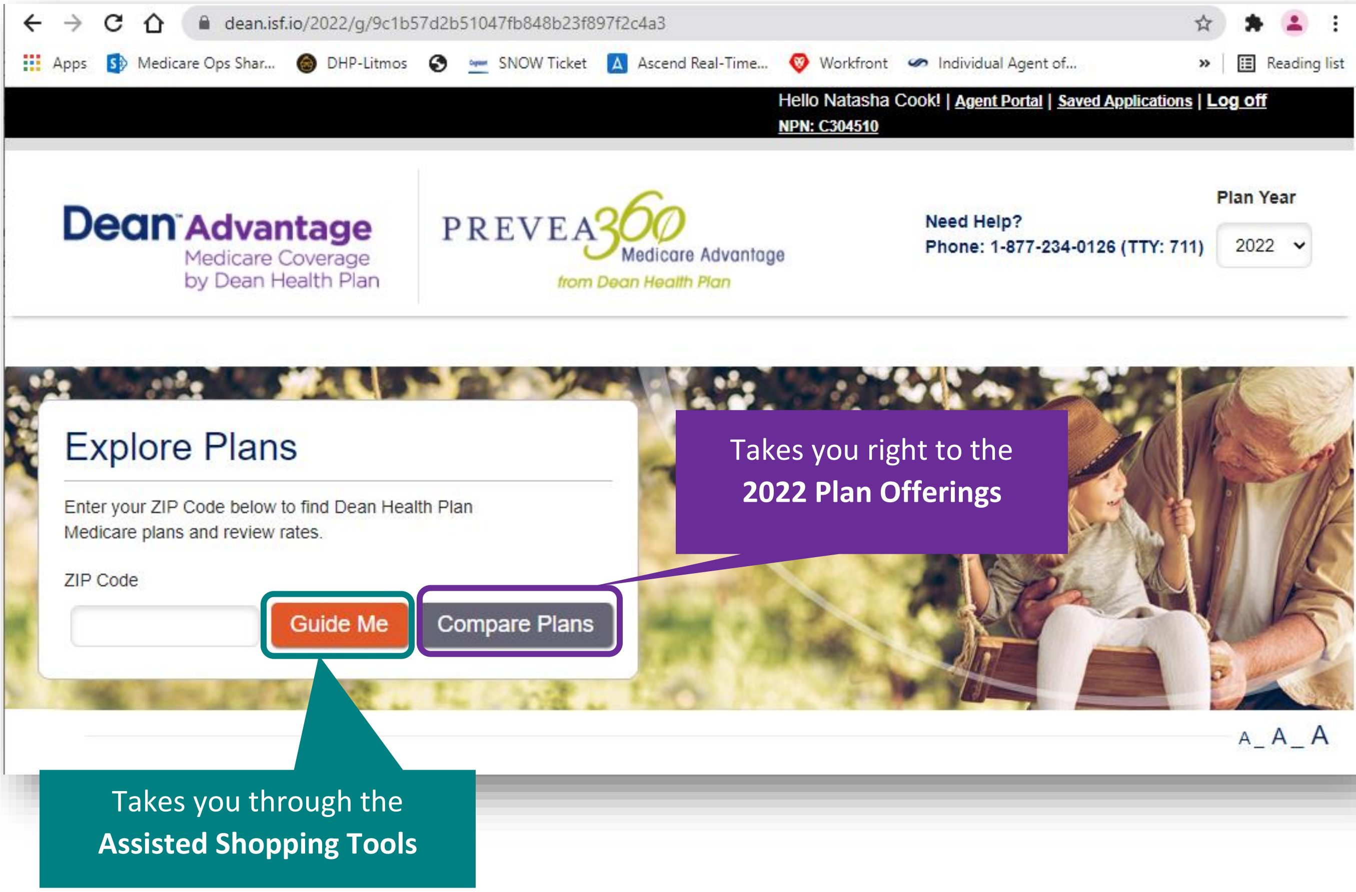


149. Make sure when you login it says **"Hello [Your Name]!"** in the top right hand corner
    a. You will notice that your "NPN" will show up as a "C" number, that is your internal Medicare Advantage writing number with us
    b. Its best to clear your cookies and cache before logging in



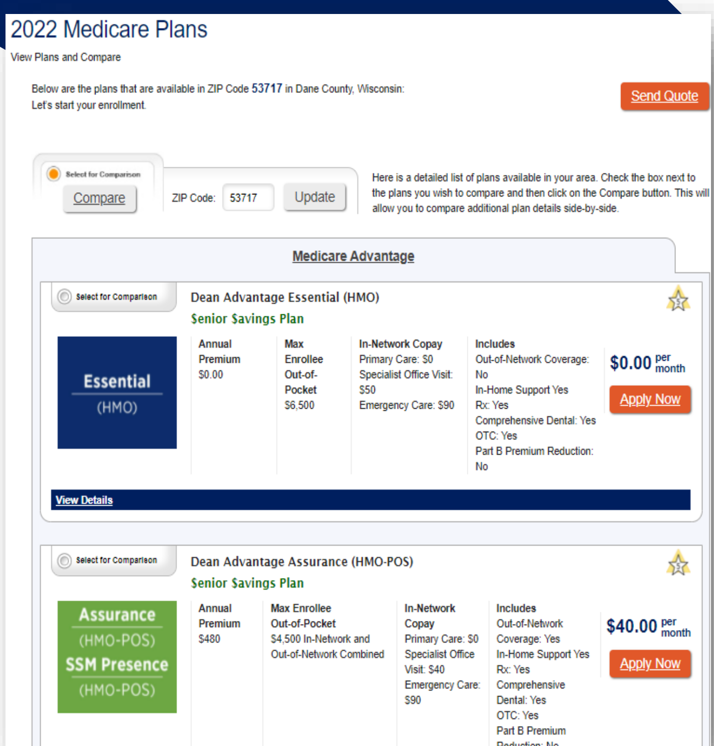
AQE: Quoting & Enrolling

150. The site will start you at the Explore Plans/Quoting Page- See the "Quoting and Enrolling" Section for more information
    a. The "**Guide Me**" button will take you to the Assisted Shopping Tools- See the "Assisted Shopping Tools" for more information
    b. The "**Compare Plans**" Button will take you right to the 2022 plans

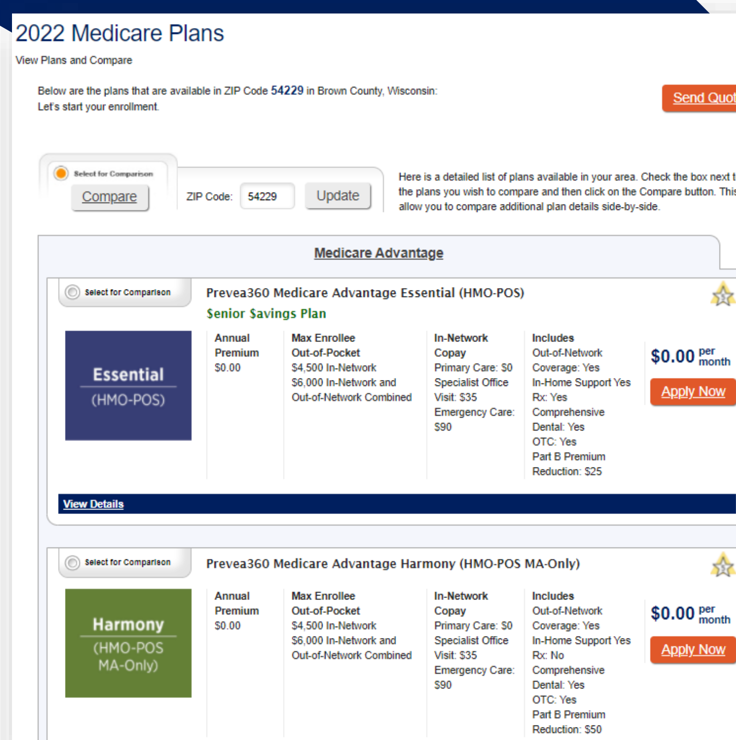


151. Based on the Zip Code you enter will display the associated plans for that service area

Zip Code: 53913- Dean Advantage



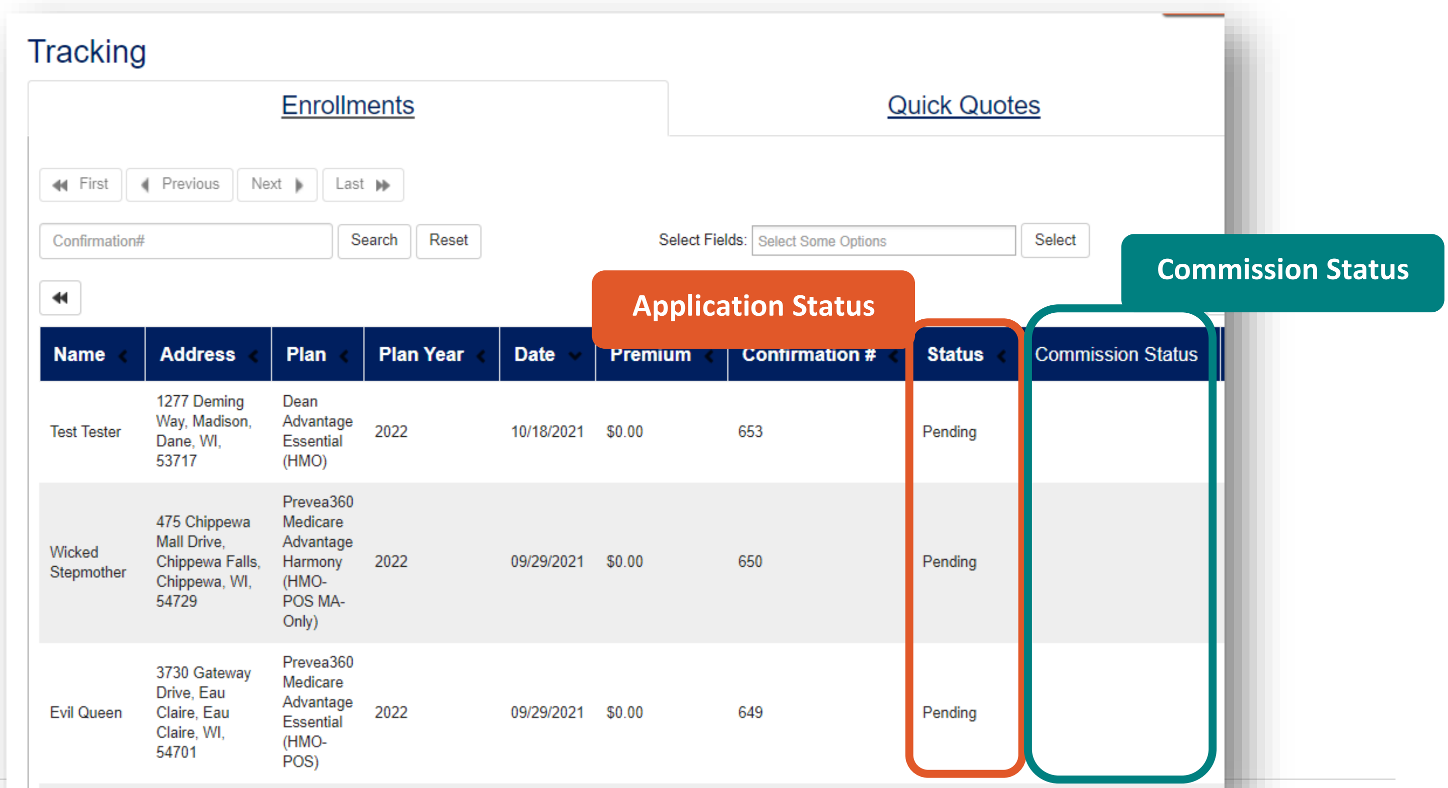
Zip Code: 54229 P360 Advantage



View Enrollments, Application Status, & Commission Status

152. From the Ascend Agent Portal, click on the “**Agent Portal**” link

153. From here you can see any applications that you have submitted through any of the Ascend Mechanisms
   a. **Application Status:**
      i. **Pending:** Received and Submitted to CMS
      ii. **Enrolled:** Application approved by CMS
      iii. **Not Enrolled:** Application was rejected by CMS. Member is not enrolled
      iv. **Disenroll:** Application associated with a Member who has since disenrolled voluntarily
      v. **Cancelled**: Application associated with a prospective member who has since withdrawn the application
      vi. **Duplicate:** Application associated with a prospective member that has been identified as a duplicate for the same effective date
   b. **Commission Status:** *(I don’t get paid on commission for that’s why my portal doesn’t show a status)*
      i. **Blank:** Default
      ii. **Paid**: The commission has been pai
      iii. **Recouped**: The commission has been recouped
      iv. **AOR Change:** Application has been superseded by a new application from a different agent



ARM (Ascend Realtime Manager)

Background of (ARM)

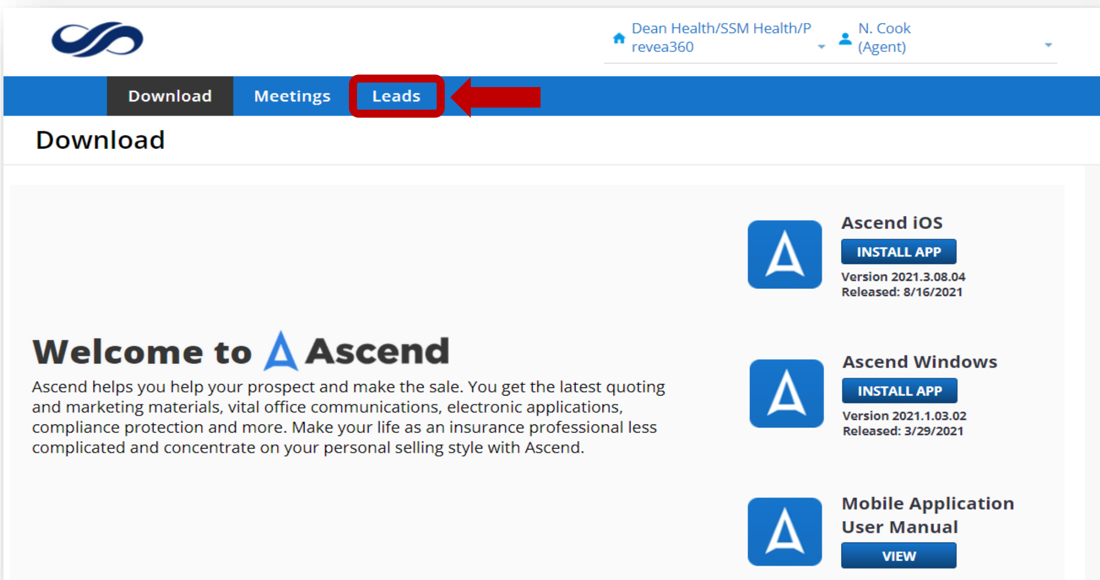
This is where you can download the AMA application on your iOS device or your PC. Update or change your password for AMA & Agent Portal. You can also you can easily manage all your prospect information (book of business or leads)

Functions of ARM

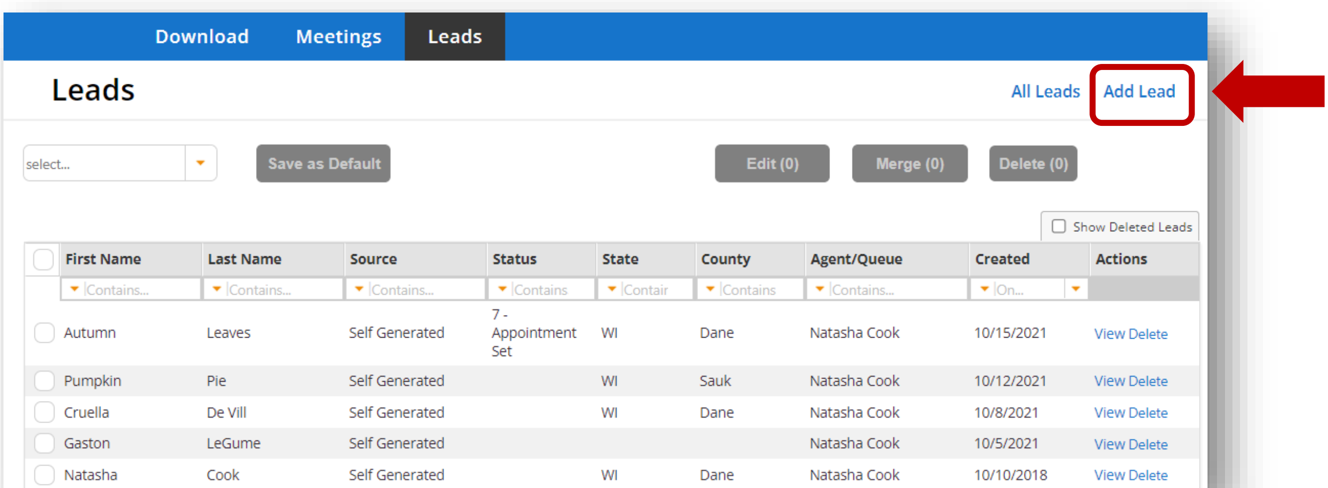
- Add Lead information
- Edit Lead information
- Delete/Recover Lead information
- Review Prospect sales cycle and process
- This allows you to track your sales!

Managing/Adding Leads via ARM

154. If you want to add your leads or manage your leads from a data entry stand point you can use ARM for this function. Go to https://arm.ascendproject.com
155. Click on the "**Leads**" button



156. Click on the "**Add Lead**" link

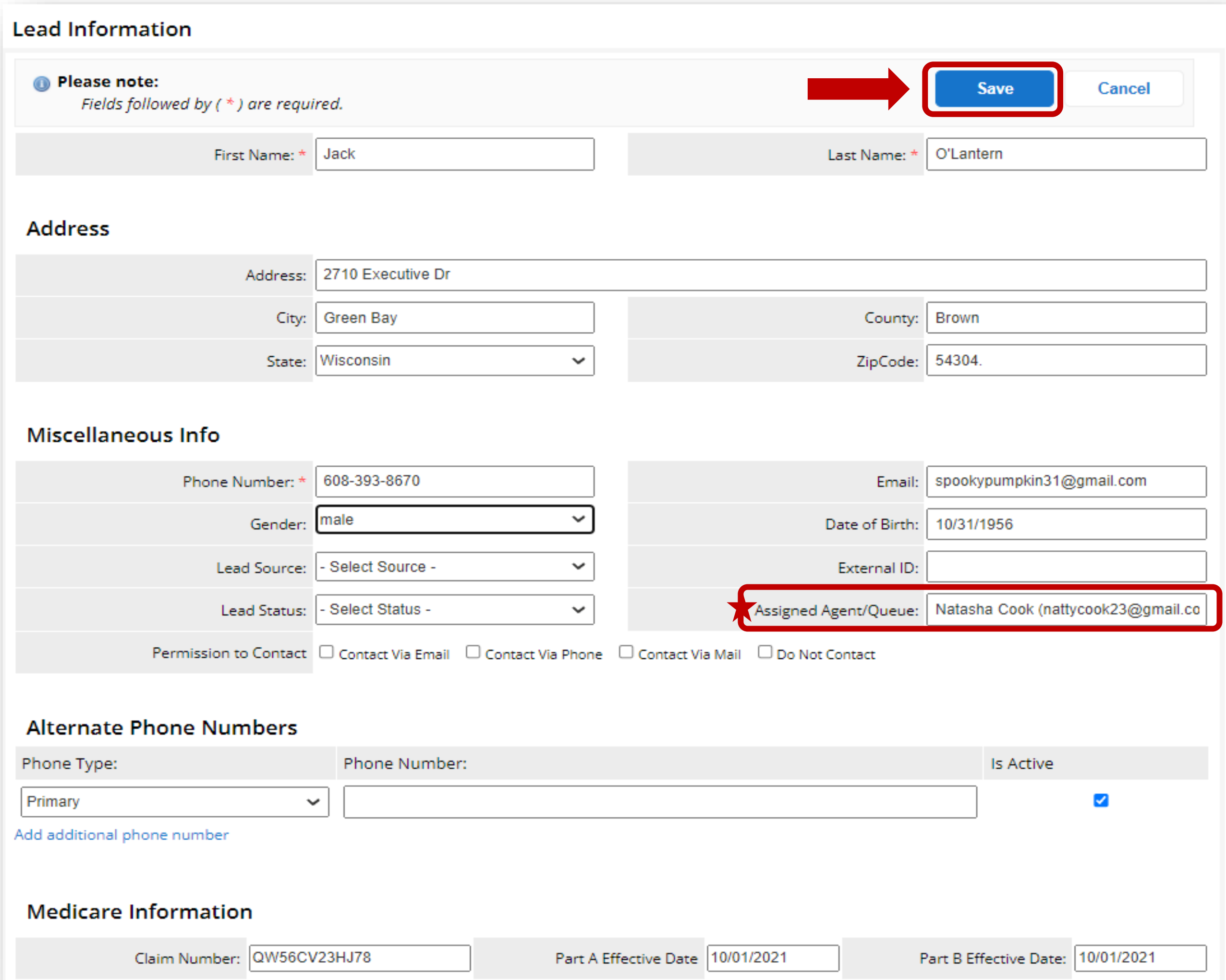


157. Fill out all the lead information that you want to add. **Make sure to add your Agent Name to the Lead** and click on the "**Save**" button

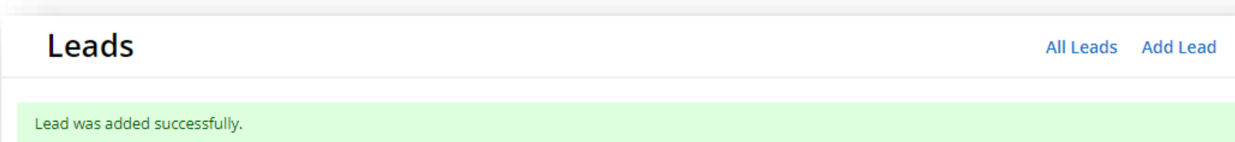
   a. **Note**: If you don't add your name to the lead, it wont show under your list of leads

      i. Reach out DHP.MAPDSales@deancare.com so the DHP Sales Staff can add you to the lead or you will have to re-enter the lead to show under you leads

      ii. These are your leads, no other agent will have access to you leads

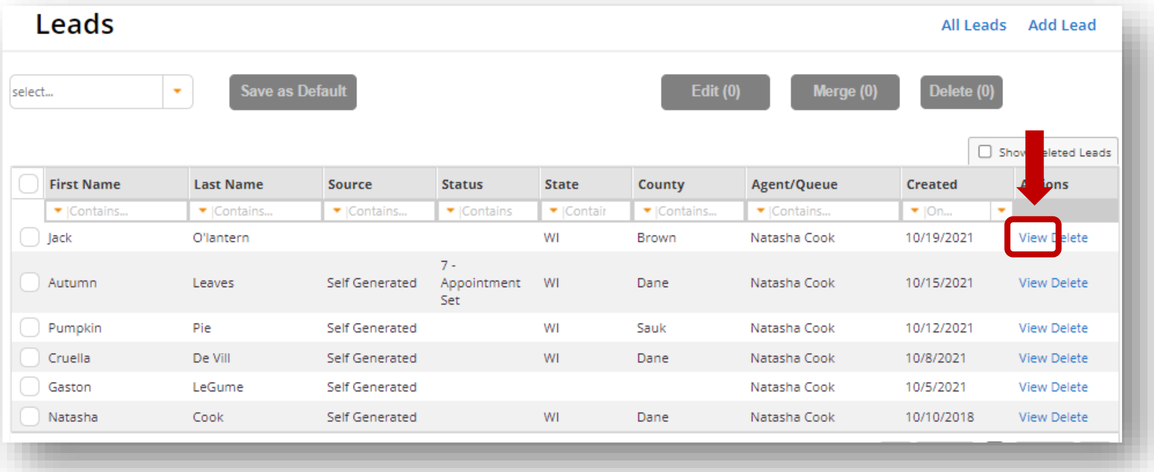


158. You will get a notification that the lead was added successfully

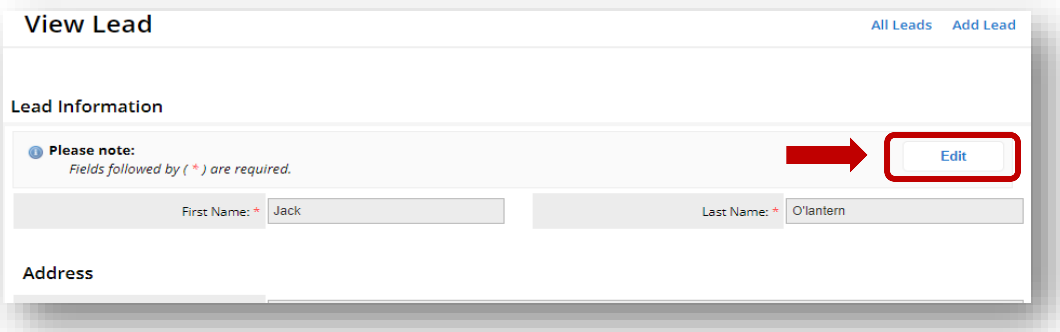


Editing Leads via ARM

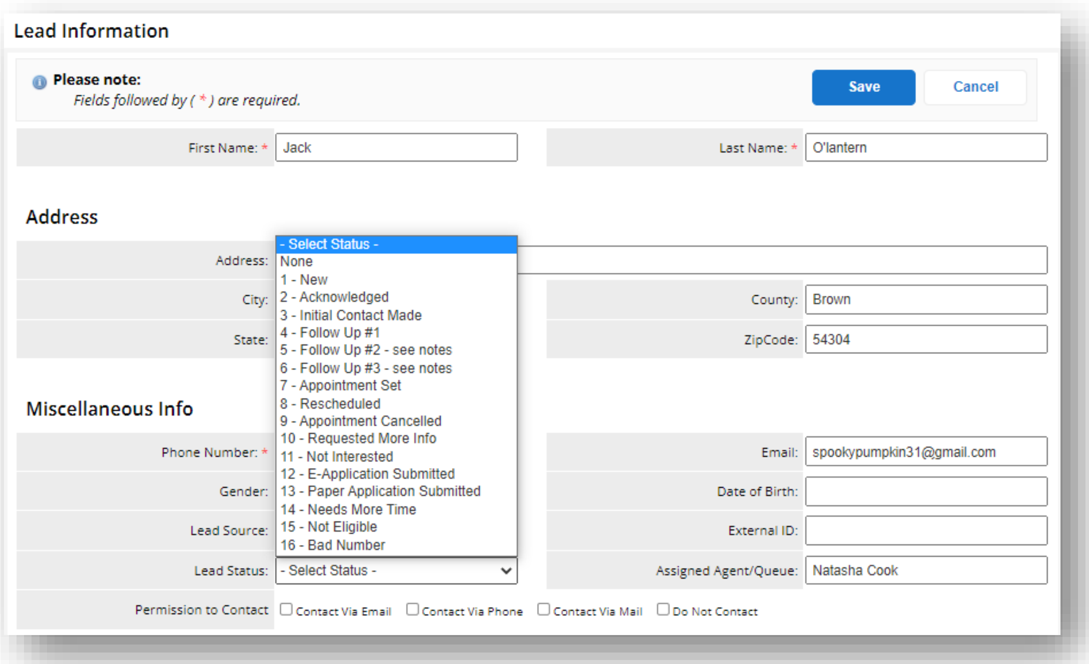
159. Go back to your Leads and click on the “**View**” button on the Lead you want to edit



160. Click on the “**Edit**” button

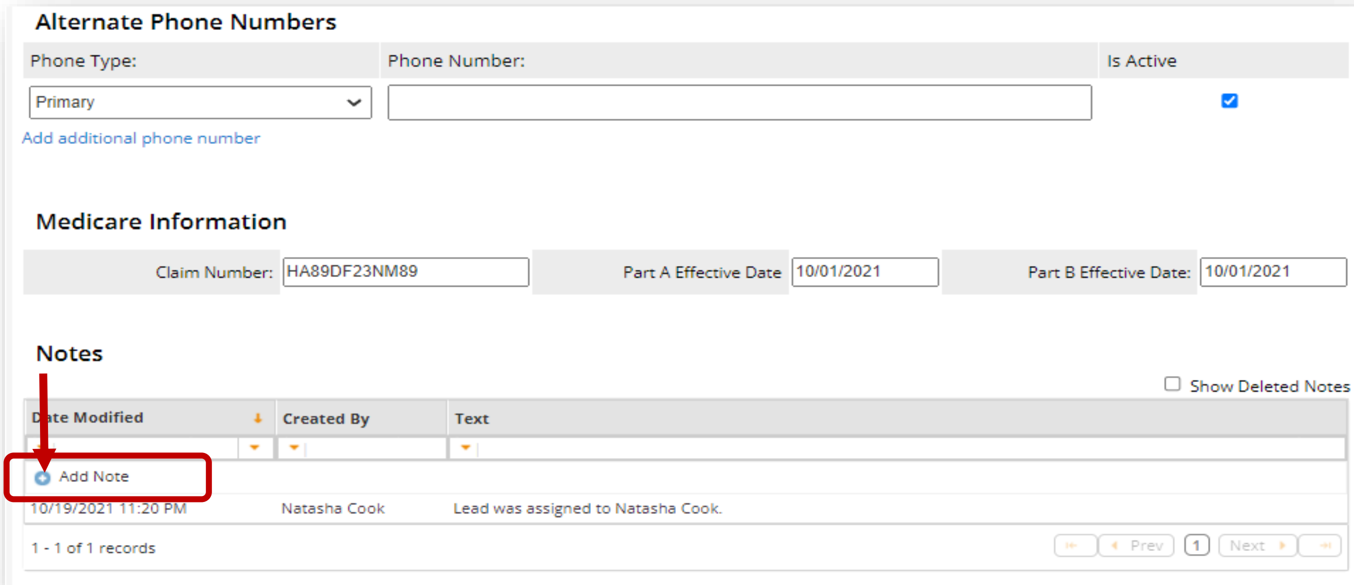


161. From here you edit demographics, lead statuses, etc. Once you have made your changes click on the “**Save**” button to save your changes

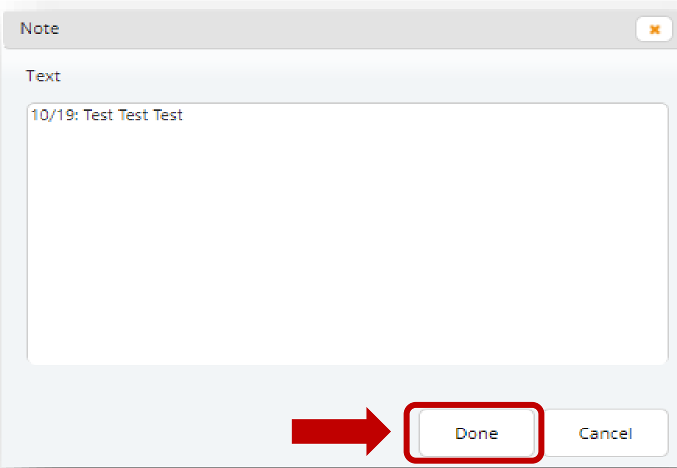


Adding Notes via ARM

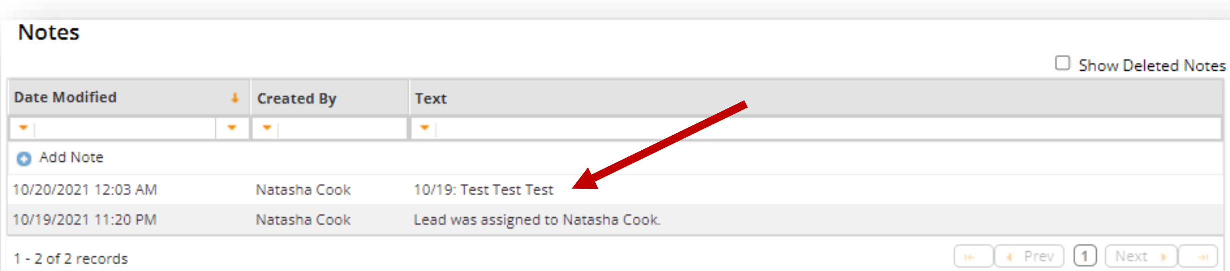
162. Go back to edit your lead, scroll down to the Notes area and click on "**Add Note**"



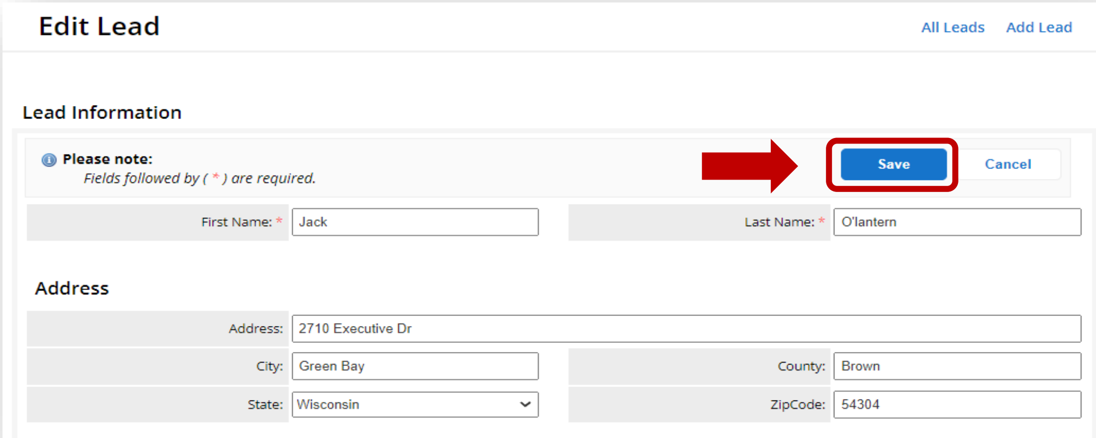
163. Add your notes and click on the "**Done**" button



164. You will see your note in the notes section

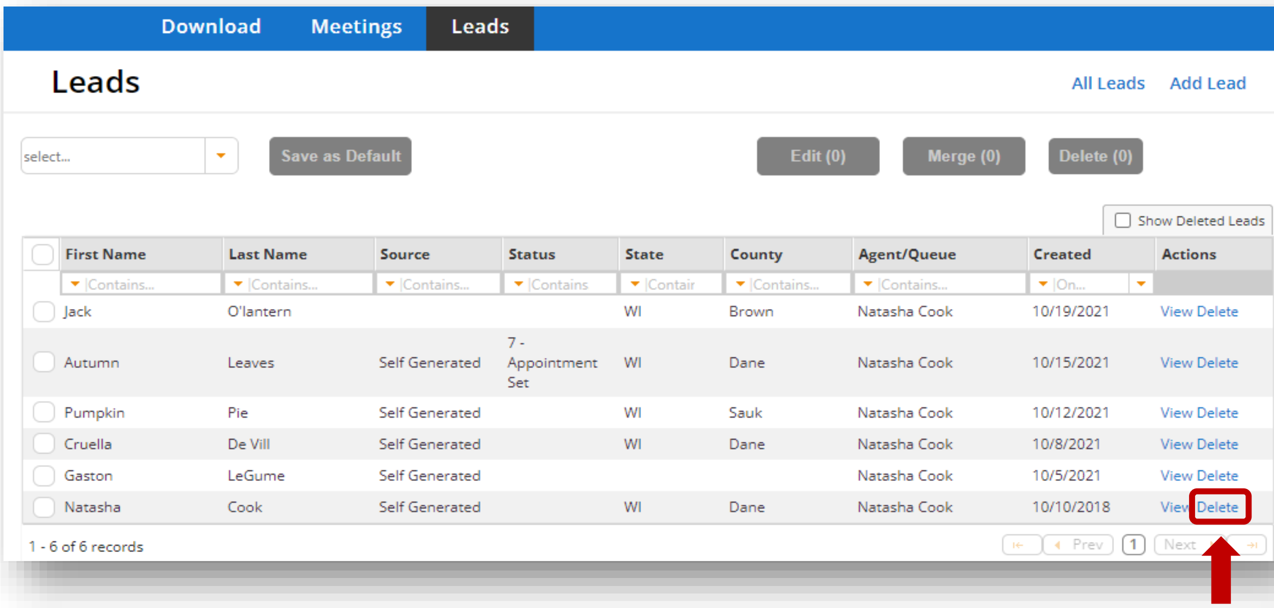


165. Once you have made all your necessary edits, scroll up to the top of the lead and click on the "**Save**" Button

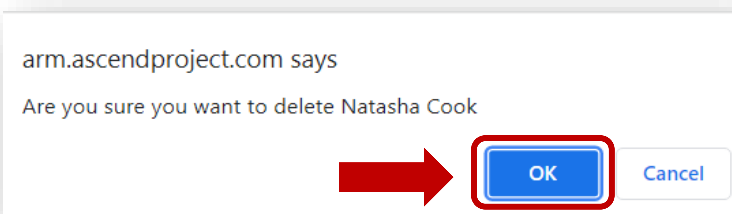


Deleting Leads

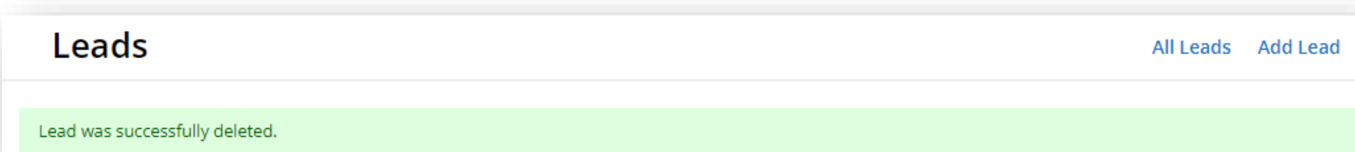
166. Go into Leads and click on the "**Delete**" button next to the lead that you want to delete



167. You will get a notification if you are sure you want to delete, if you are sure click on the "**OK**" button

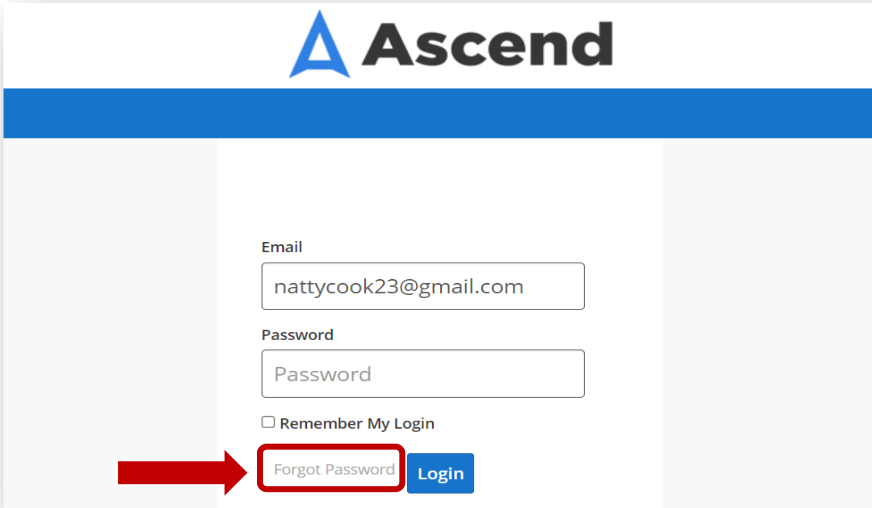


168. You will get a notification that the lead was successfully deleted

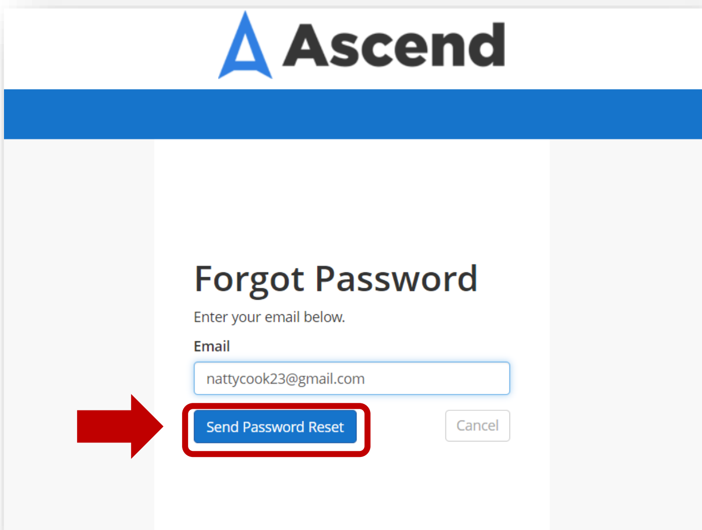


Password Resets

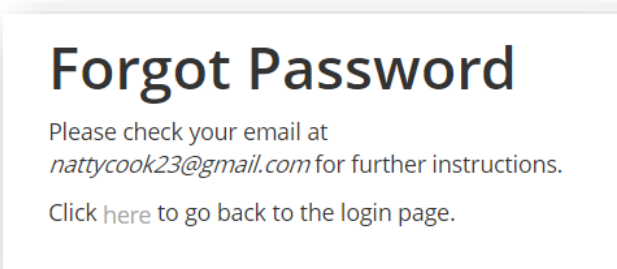
169. If you are unable reset your password from AMA or Ascend, you may need to reset your password from ARM
170. Go to https://arm.ascendproject.com and click on "**Forgot Password**"



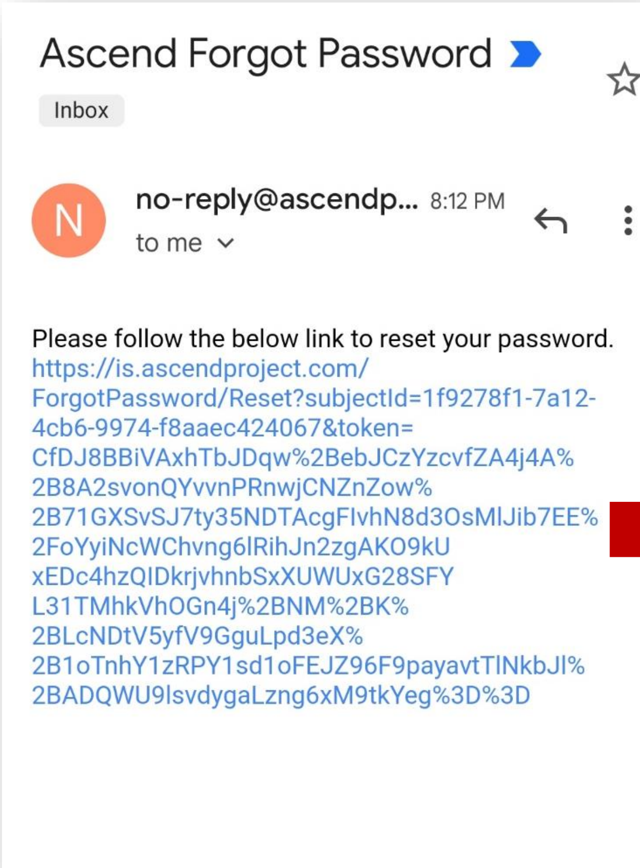
171. Type your email address and click on the "**Send Password Reset**" button

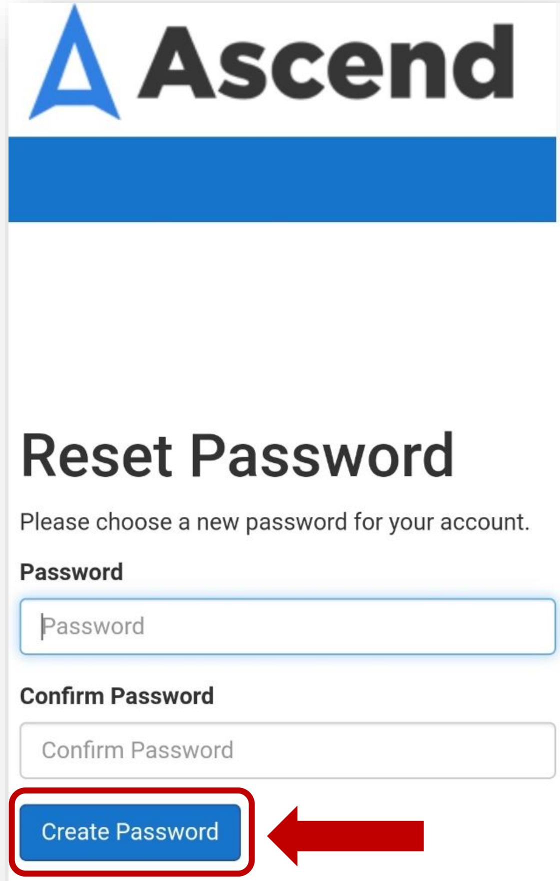


172. You will get the next message to go back to your email

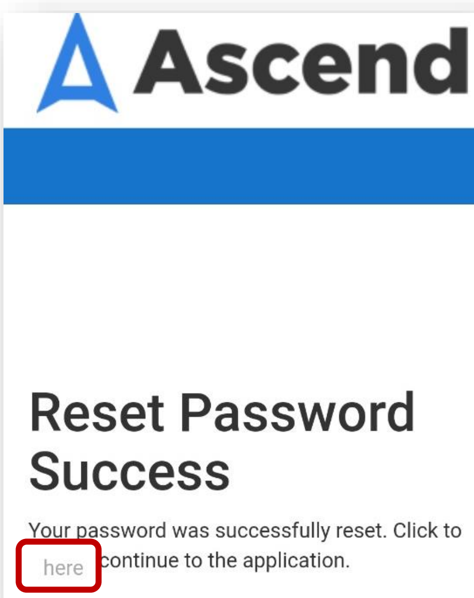


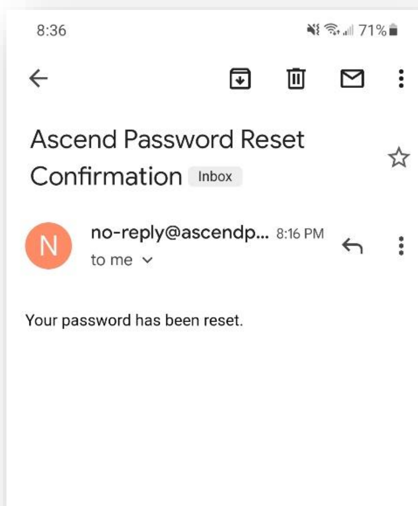
173. Click on the link in your email to reset your password and once you have entered your new password, click on the "**Create Password**" button





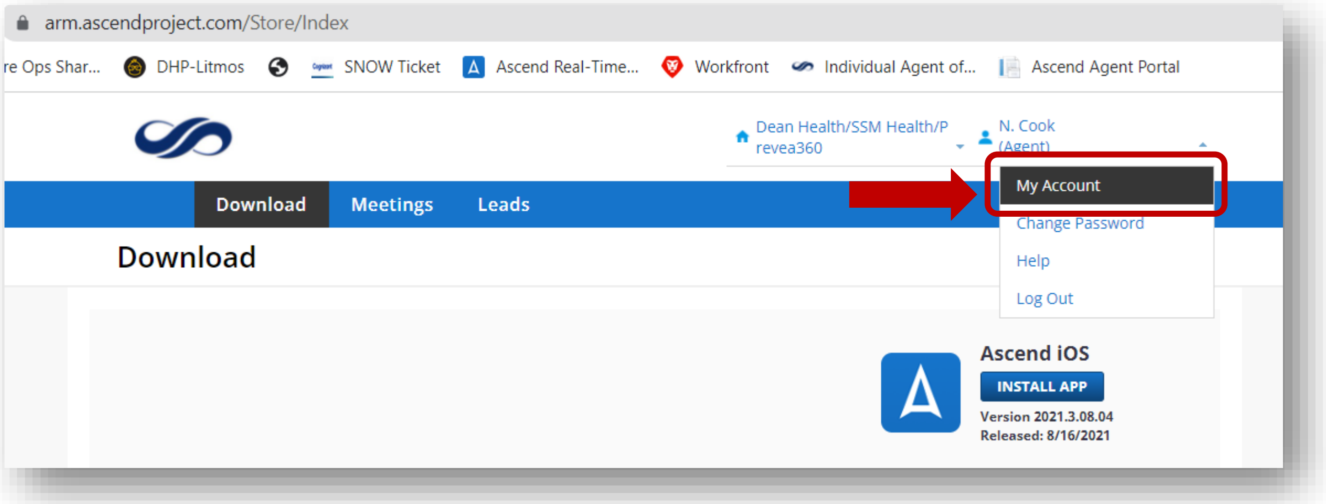
174. Next, click on the "**Here**" link to go back and login with your new password. You will also get an email notifying you that your password has been reset.
    a. If your new password doesn't work right away, it could be timing of the reset so wait until you get the notification email





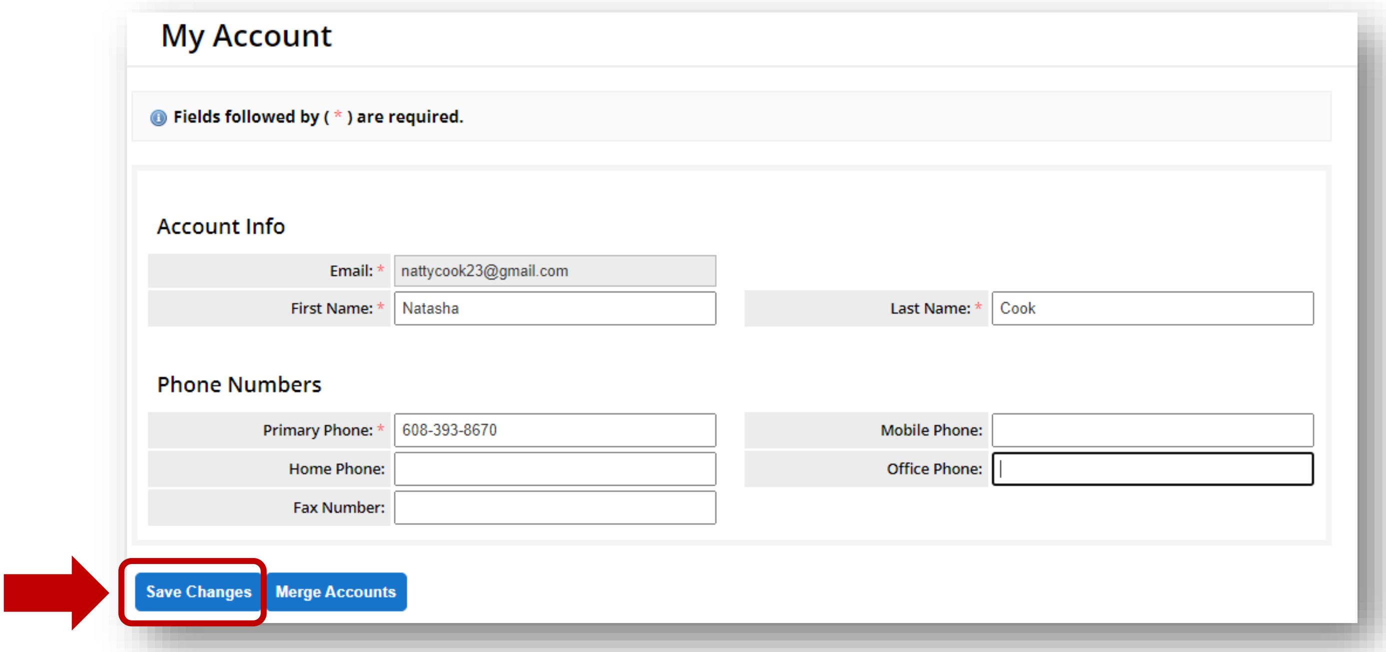
Updating Your Demographics

175. If you want to make any changes to your name, address, phone etc. you can do so by click on **"My Account"**



176. Make your necessary changes and click on the "**Save Changes**" button

   a. It's a good idea to make sure that you notify WFH of any changes as well to make sure our records are up to date



Definitions:

Ascend:

Ascend is a secure, encrypted real-time, cloud-enabled data platform that brings all necessary tools for field agent sales and member engagement interaction into one platform

ARM:

Ascend Real-Time Manager or ARM is the central hub for the Ascend platform. This web-based software gives leadership and administrators full control over all aspects of their field sales team's activity and offers transparency into that activity with reporting. Ascend also assists the sales teams with online quoting, enrollment, and lead management tools while safeguarding agents from complaints of misinformation and compliance questioning by securely recording the details of each meeting.

Ascend Agent Portal:

Allows you to quote and enroll clients and see any applications that have been submitted via the Ascend products

Medicare Advantage:

Dean Health Plan's Medicare Advantage Prescription Drug (MAPD) Plan's (i.e., Dean Advantage or Prevea360 Medicare Advantage)

Dean Advantage:

MAPD Plan offered in South-Western Wisconsin (Columbia, Dane, Dodge, Fond du Lac, Green, Iowa, Jefferson, Rock, and Sauk Counties)

Prevea360 Medicare Advantage:

MAPD Plan offered in Northern Wisconsin (**2021:** Brown, Door, Kewaunee, Oconto, and Sheboygan counties. **2022**: Brown, Chippewa, Door, Eau Claire, Kewaunee, Oconto, and Sheboygan counties.)

Power of Attorney (POA):

Authorized person to act on behalf of the individual under the state laws in Wisconsin