

# Aetna Ascend

## Remote Agent Telephonic Enrollment



# What is RATE?

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A function built into the Ascend Mobile Application (AMA) that enables agents to complete Medicare health plan enrollments in a location away from the beneficiary

To be compliant with CMS, these enrollments must occur through Ascend

RATE is available ONLY with an iPad and runs on iOS technology

# Who Benefits from RATE?

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## **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 their enrollment is directly submitted electronically

# Who Benefits from RATE?

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## You do!

With the Ascend technology, you as an agent can complete enrollments without being in a face-to-face meeting

This will help complete enrollments efficiently when you have a prospect who cannot meet with you in person

You already met in person but is now ready to enroll

Has no cellular or Wi-Fi access at their home

Save time = more enrollments during your busy selling season

# How Do I RATE?

Each agent will be given a unique RATE phone number to share with their prospects

This phone number can only be answered through AMA on your iPad

You must be logged in to AMA to receive a RATE call

You need to know when your prospect will call so that you can be prepared to answer it through your Ascend

If you are already in a meeting with a prospect, you cannot take a RATE call

When your prospect calls your RATE line:

Your iPad will ring like a phone and you will tap a button to receive the call

Your prospect will hear you through the iPad and you can complete the enrollment as normal in Ascend.

# RATE Call Functions in Ascend

The screenshot displays the Ascend user interface for Felicia Papier. The top left corner features the Flagpole Healthcare logo. The main header area says "Welcome Felicia". Below this, there is a "Getting Started" section with a "Welcome to Ascend." message and a "Set Up a Meeting" button. To the right of this section, there is a "Check here that you are set to 'Accepting Calls'" annotation with an arrow pointing to the user profile dropdown menu. The dropdown menu is open, showing the user's name "Felicia Papier" and the status "Accepting Calls". Below this, there is a "My Number: +18443117891" field. The "Available" toggle switch is turned off, and the "Accepting Calls" toggle switch is turned on. Other options in the dropdown menu include "Action Items", "Lead Alerts", "Messages", "Change Password", and "Sign Out".

Check here that you are set to "Accepting Calls"

My Number: +18443117891

Available

Accepting Calls

Action Items

Lead Alerts

Messages

Change Password

Sign Out

**Getting Started**  
Welcome to Ascend.  
[Set Up a Meeting](#) [Add a New Lead](#)

**New Leads**

Name	Date Modified	Source
You have no new leads. Any new leads will appear here.		

# RATE Call Functions in Ascend

The screenshot displays the Ascend mobile application interface for Felicia Papier. The top navigation bar includes the Flagpole Healthcare logo on the left and the user's name 'Felicia Papier' with a status indicator 'Unavailable: Accepting Calls' on the right. The main content area features a 'Welcome Felicia' message and a navigation sidebar on the left with icons for Home, Leads, Seminars, Recordings, Resources, and Help. A central notification card titled 'Incoming Call' provides details: 'You have an incoming call from:', 'Lead Name: Marc Papier', and 'Phone Number: (812) 360-8869'. Below the details are two buttons: a blue 'Answer Call' button and a red 'Reject Call' button. A purple callout bubble is overlaid on the 'Answer Call' button, containing the text: 'Your iPad will ring like a phone and you tap on Answer Call'. At the bottom of the screen, there is a table header with 'Date Modified' and 'Source' columns, and a message: 'You have no new leads. Any new leads will appear here.'

# RATE Call Functions in Ascend

Flagpole Healthcare

Felicia Papier  
Unavailable Accepting Calls

Home Leads Seminars Recordings Resources Help

Papier, Marc  
Jul 27, 2017 Self Generated

Contact Lead Start a Meeting

General Notes  
Marc was unabl

**Connected Call**

Lead Name: Marc Papier  
Phone Number: (812) 360-8869

[View Lead Details](#)

Hang Up Talking

There are no scheduled meetings for this lead. Any scheduled meetings

Schedule a Meeting

Past Meetings

**Come back here to hang up RATE call**

**Tap "Talking" to mute or unmute yourself**

**Carry on to the "Enroll a Client Over the Phone" tile**



# Special Considerations for RATE

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You will follow through filling out the enrollment application

Although some steps are the same, there are important differences between doing an enrollment in person vs. using RATE:

In-Person Enrollment	RATE Enrollment
No Enrollment Script	Enrollment Script found in Resources
Clear verbal agreement to enroll. They also do get to tap a button that signifies their intent to enroll	Clear verbal agreement to enroll which counts as a verbal 'signature'
Beneficiary can read and agree to plan terms and conditions	Agent must read and get verbal agreement "I agree" to terms and conditions
They will be able to see and write down their confirmation number	You will give them their confirmation number verbally

## Special Considerations for RATE

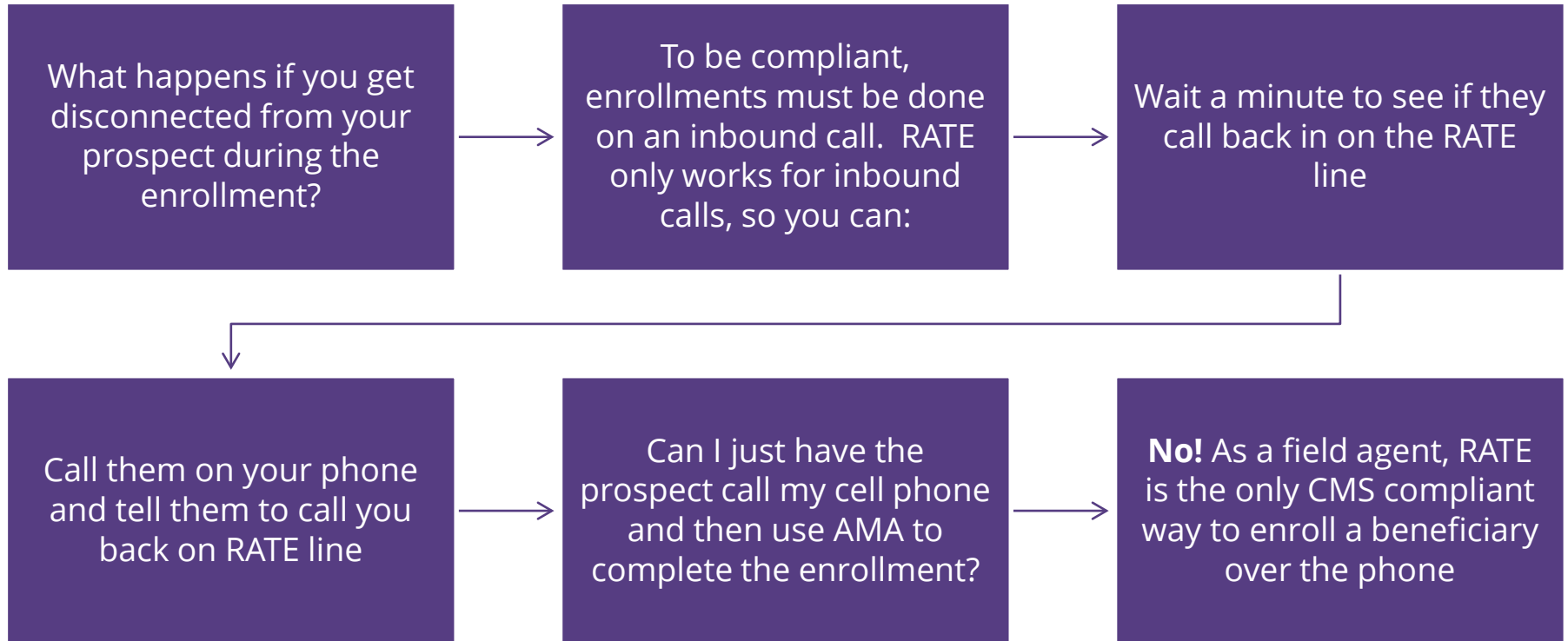
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Use the enrollment script to make sure you are covering all the needed steps to complete a compliant RATE enrollment

Make sure to give them their enrollment confirmation number verbally and encourage them to write it down

# Just the Facts...

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# Just the Facts...

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Can RATE calls happen at any time of day?

**Yes.** You can receive a RATE call at any time of day

Remember, you can only receive the RATE call when signed into Ascend and when you are not in another meeting

So, be sure to schedule your RATE calls with your prospect

# Conclusion

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RATE is an excellent tool that will help your business

Using RATE in AMA is the only compliant way for your prospect to call you and complete an enrollment

Remember that you are required to get their verbal agreements since they are not there to sign

Use RATE correctly and enjoy increasing your enrollments!

**Thank You!**

