

DHP's Ascend User Manual

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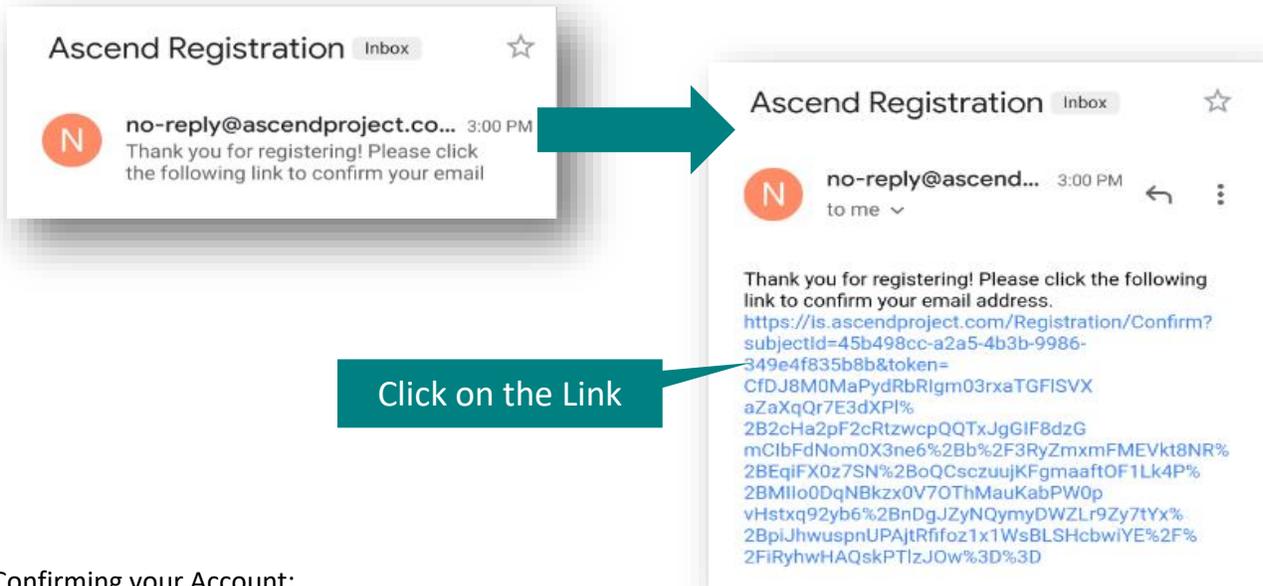
What is Ascend?

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:

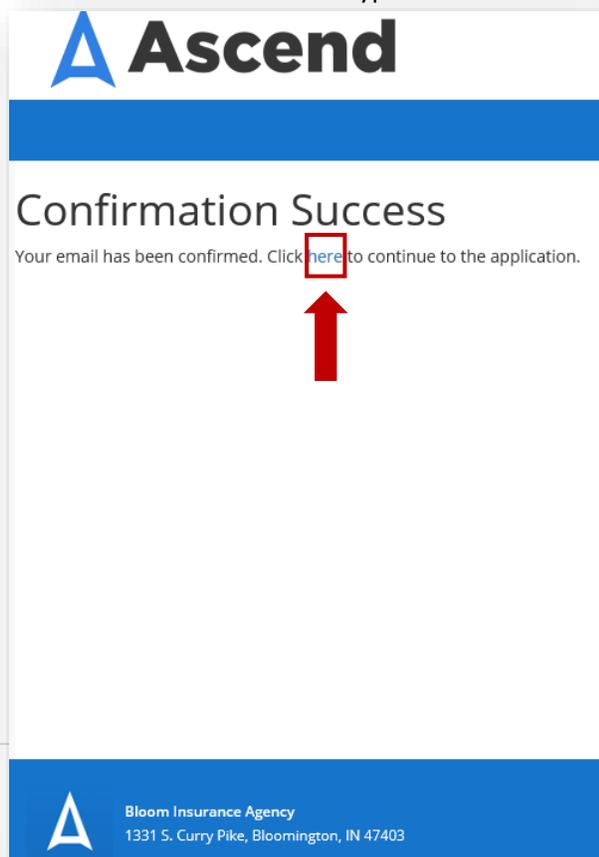
- Electronic Scope of Appointment
- Electronic application completion and submission
- Audio recording capabilities
- Replacement for paper sales support and marketing documents

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

The image shows two screenshots of the Ascend registration process. The first screenshot shows the 'Complete Your Registration' page with a red arrow pointing to the 'Complete Registration' button. The second screenshot shows the same page with a red box around the 'Complete Registration' button and a callout box listing password requirements:

Password Requirements:

- At Least 8 Characters in Length
- 1 Upper-Case Character
- 1 Numeric Character
- 1 Lower-Case Character

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

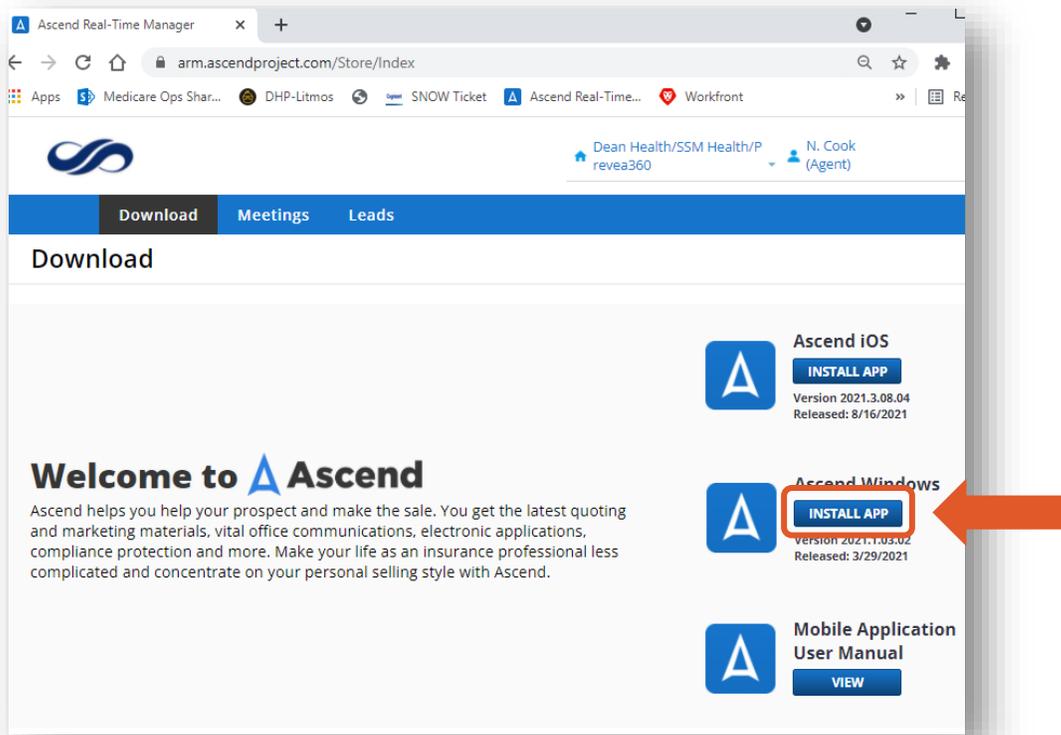
The image shows two screenshots of the Ascend registration process. The first screenshot shows the 'Confirm New User' page with an error message: "There was an error confirming your email." and "Error: The registration token is invalid or has expired." A red box highlights the link "to resend the confirmation email." with a red arrow pointing to it. The second screenshot shows the 'Resend Confirmation Success' page with the message: "Please check your email at toshmarie87@gmail.com for further instructions."

Ascend Mobile Application

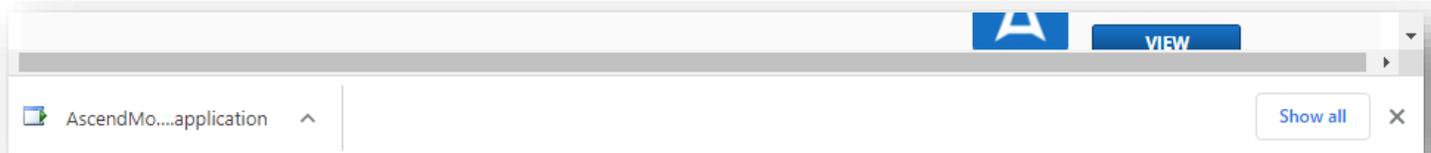
The **Ascend Mobile Application (AMA)** is the sales and enrollment platform that can be housed on your iOS, Android, Windows device. There is where you can send a electronic scope of appointment, conduct and record your sales meetings, and take a telephonic recorded application. You can also manage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

Downloading AMA (Ascend Mobile Application)

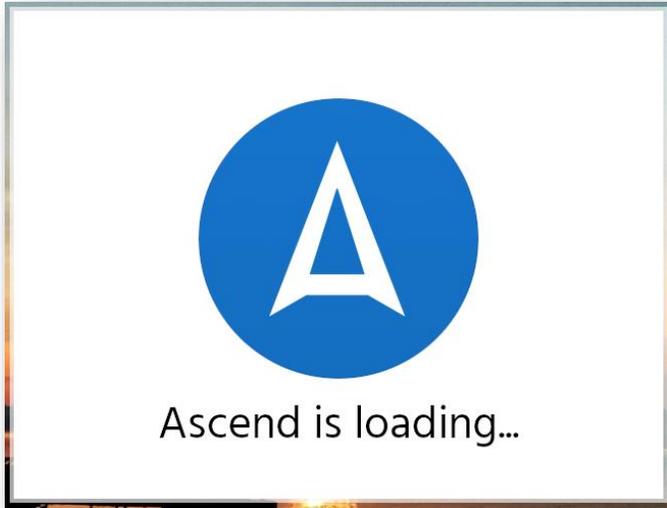
8. Go to <https://arm.ascendproject.com>
 - a. **Note:** Screenshots shown will be for using/downloading to your Windows Desktop, but screens will be the similar if downloading to iOS or Android device
9. Click on the “**Install App**” button



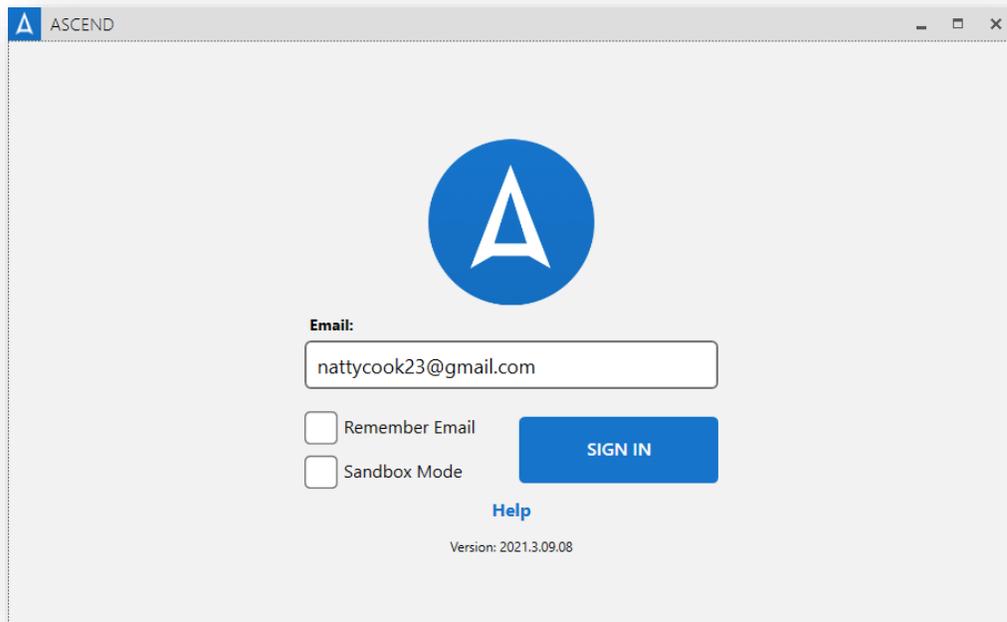
10. You may have to click on the application downloaded at the bottom of your screen:



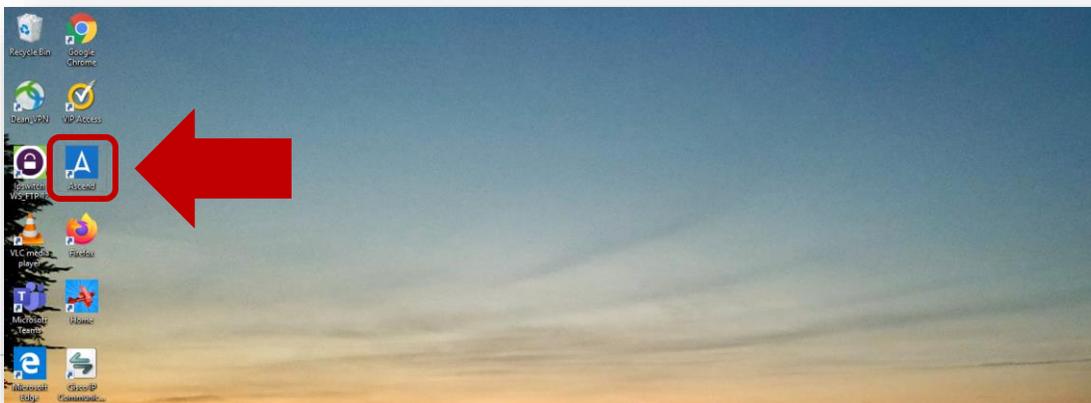
11. You will get a “loading” message



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

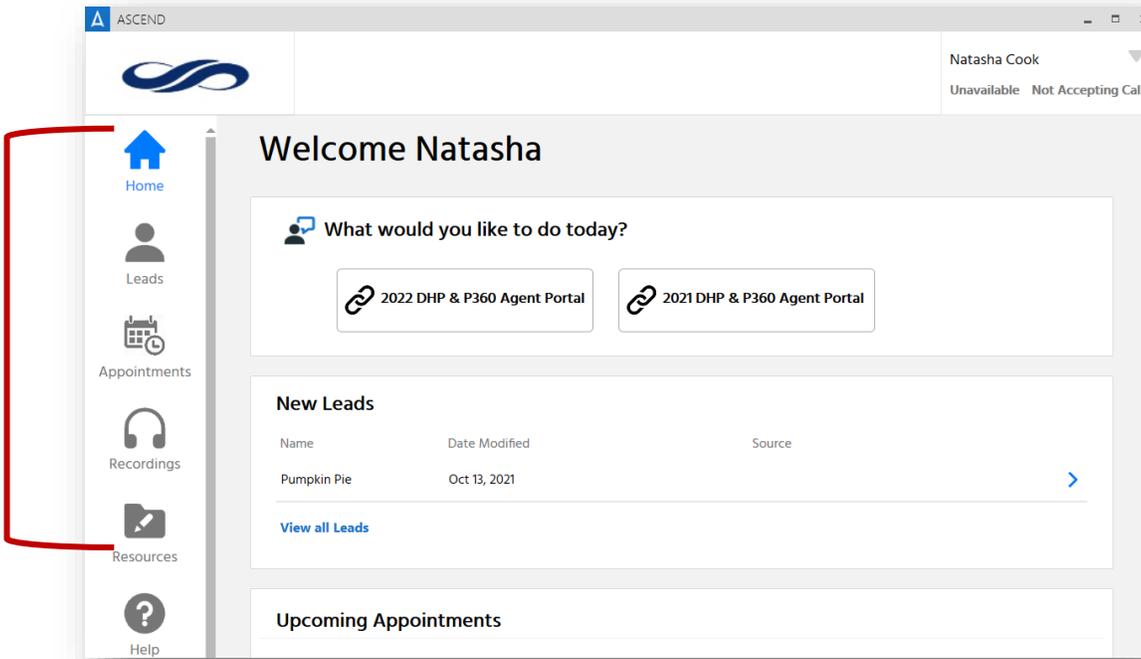


13. Ascend should also download to your desktop



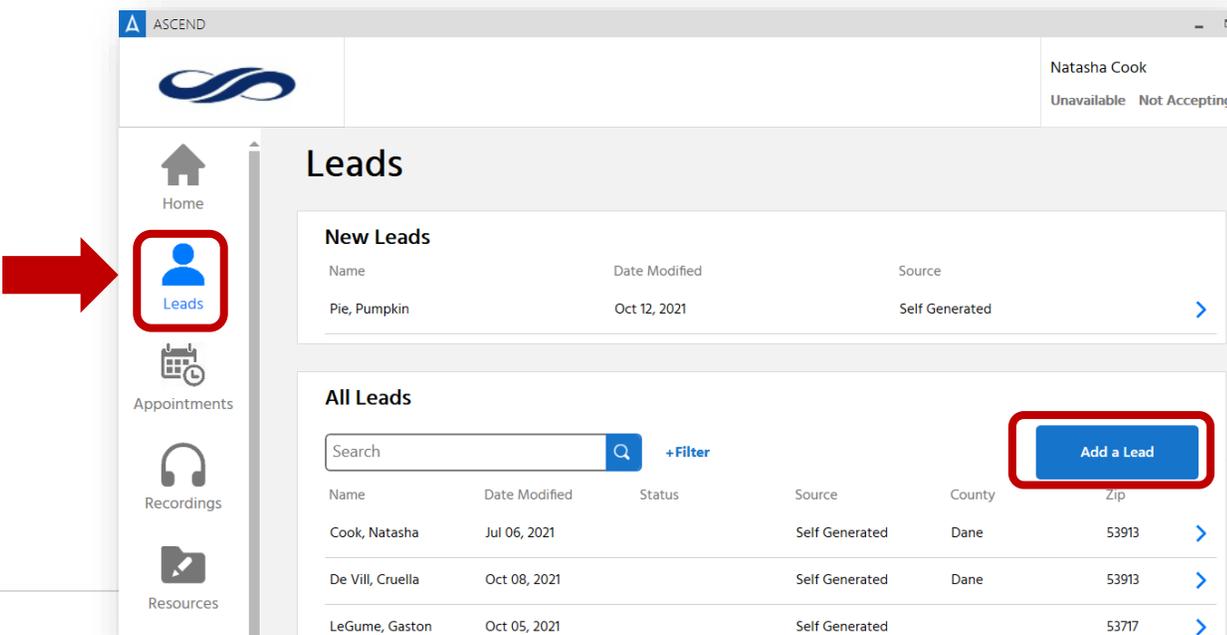
Navigating AMA

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)

ASCEND

Natasha Cook
Unavailable Not Accepting

Home
Leads
Appointments
Recordings
Resources
Help

Add Lead Scan Drivers License

Name: Autumn Leaves

Birthday: November 20 1956

Gender: Male Female

Phone: 6083938670

Email: nattycook23@gmail.com

Permission to Contact: Contact Permissions

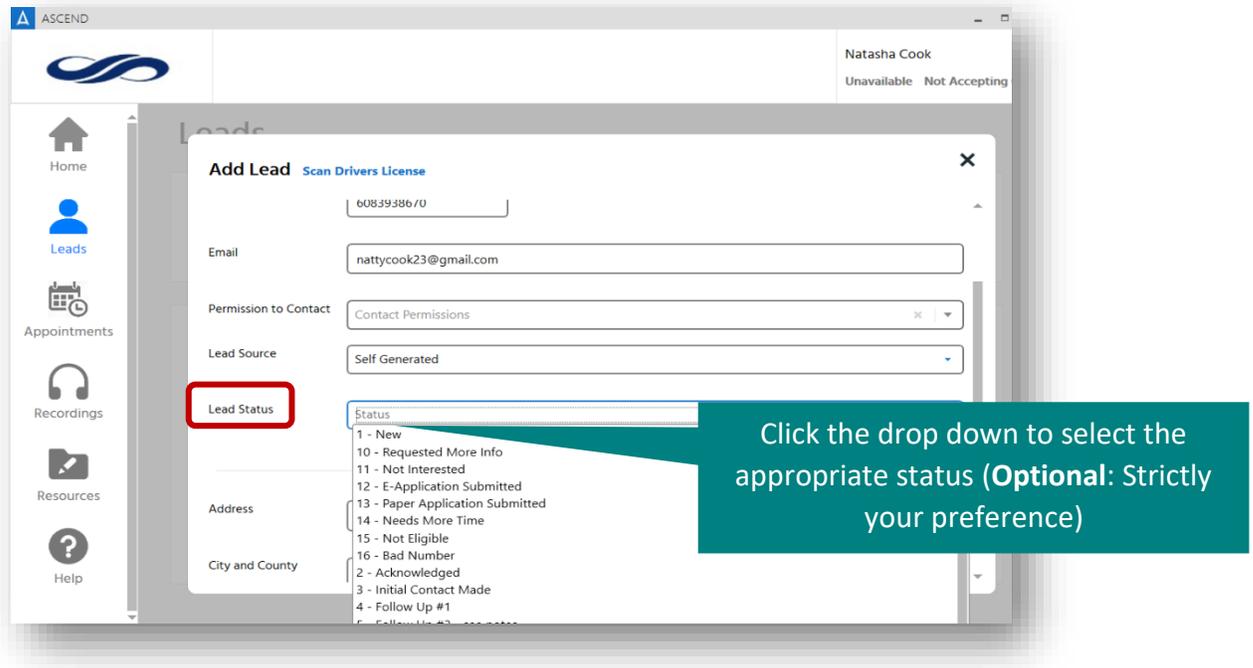
Lead Source: Self Generated

There's a scroll bar to scroll to add more information

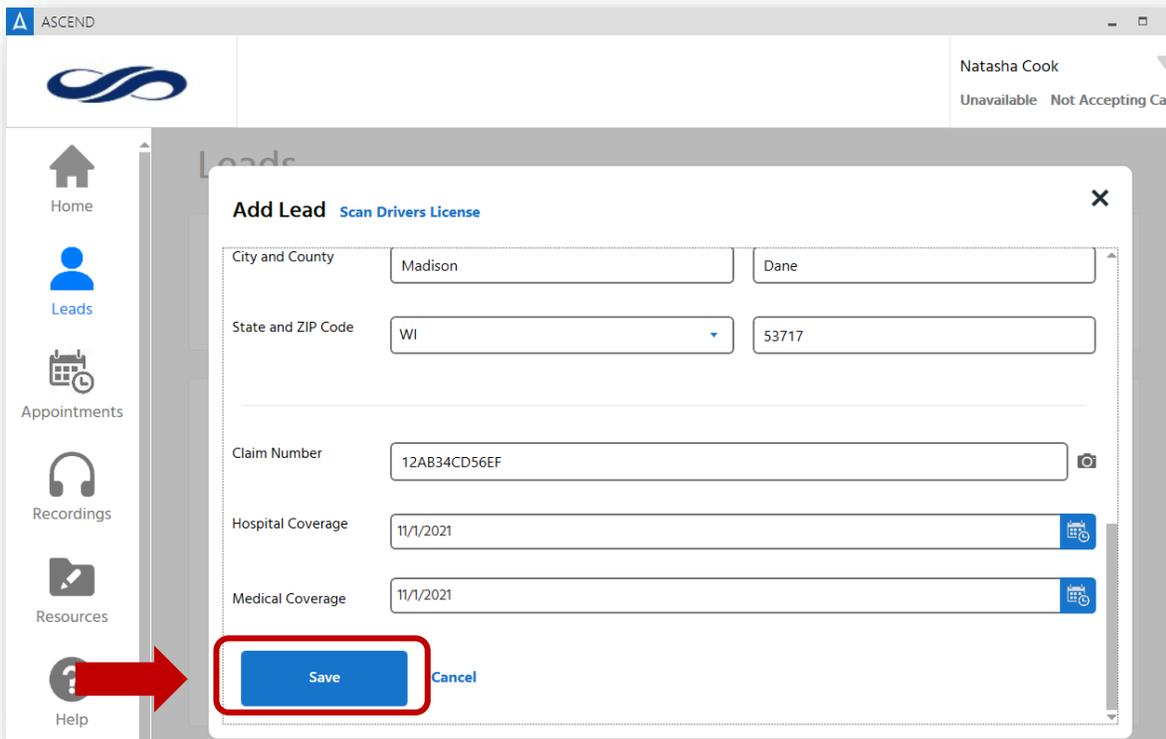
- 19. You can also click on the “Scan Drivers License” to auto-populate your clients information
 - a. **Note:** I would verify that the information on their ID is still update to date
 - b. Only works on iOS & Android Devices



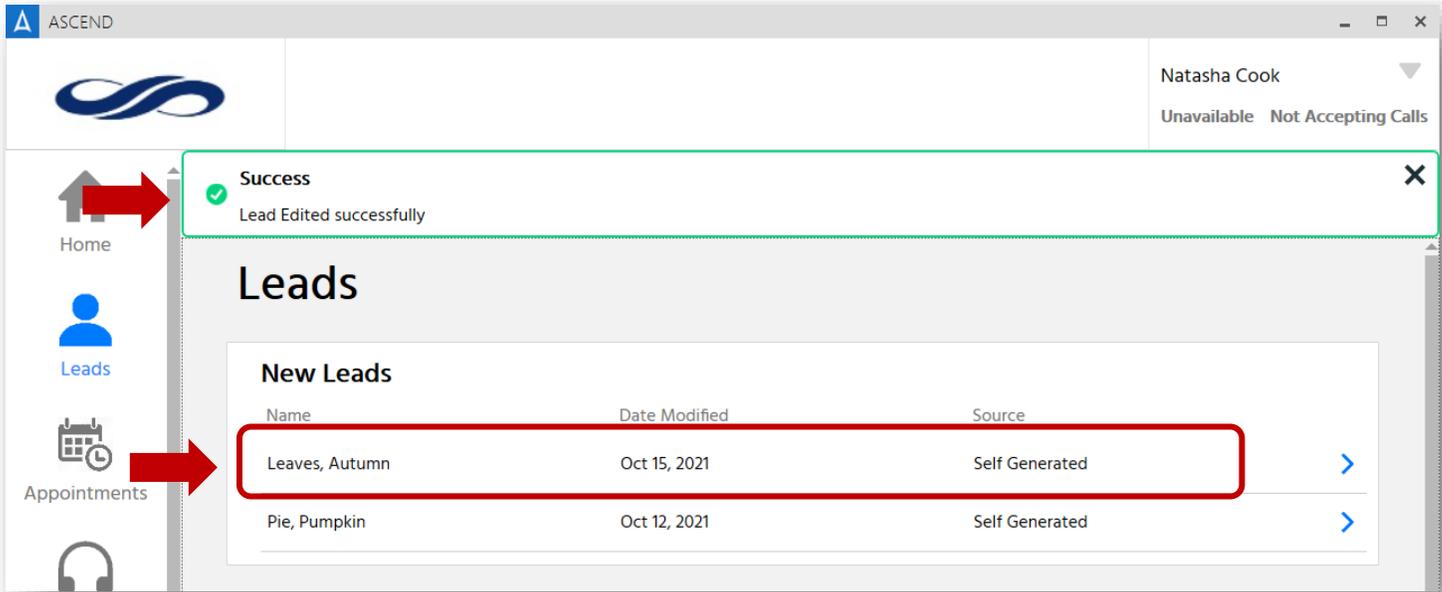
20. You can also select different Lead Statuses, so you know where you are with that Lead



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

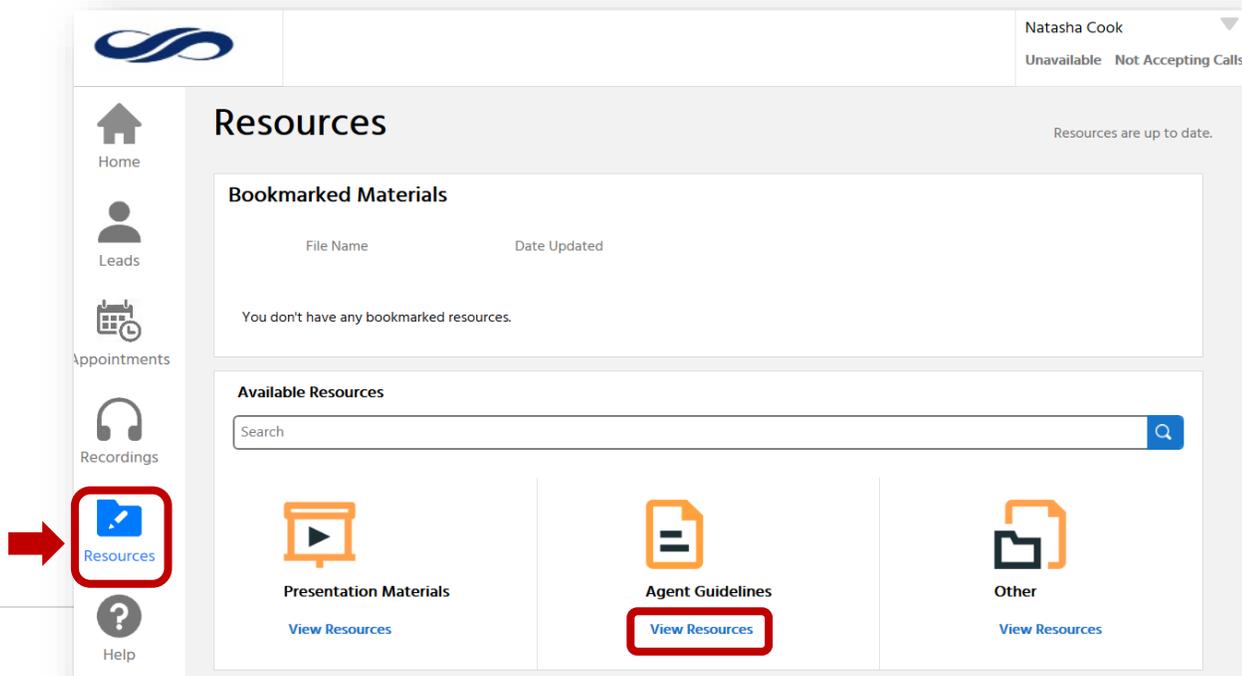


22. You will get a notification that your lead was saved successfully and You will noticed that your lead will pop up under the “New Leads” section

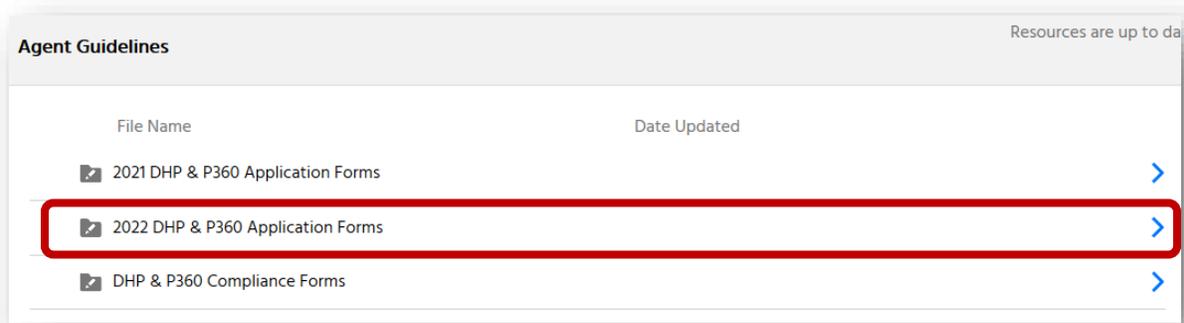


Resources

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
- There are 3 different Folders:
 - Presentation Materials:** Additional Benefit Link, ANOC & EOC's Links, Enrollment Guide/Summary of Benefits
 - Agent Guidelines:** Telephonic Scripting, Paper Application, Short Form, and SOA
 - 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



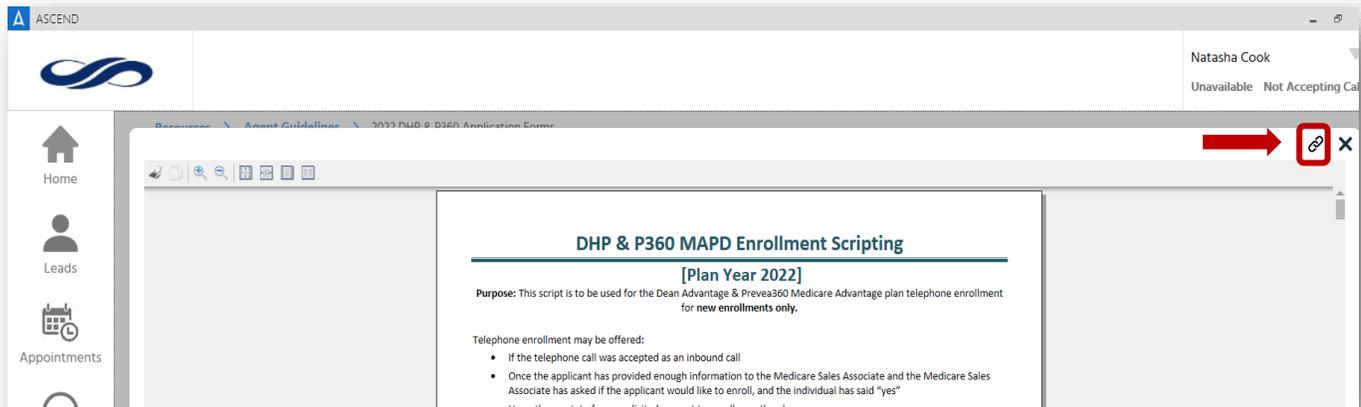
26. Click on the subfolder you want to view



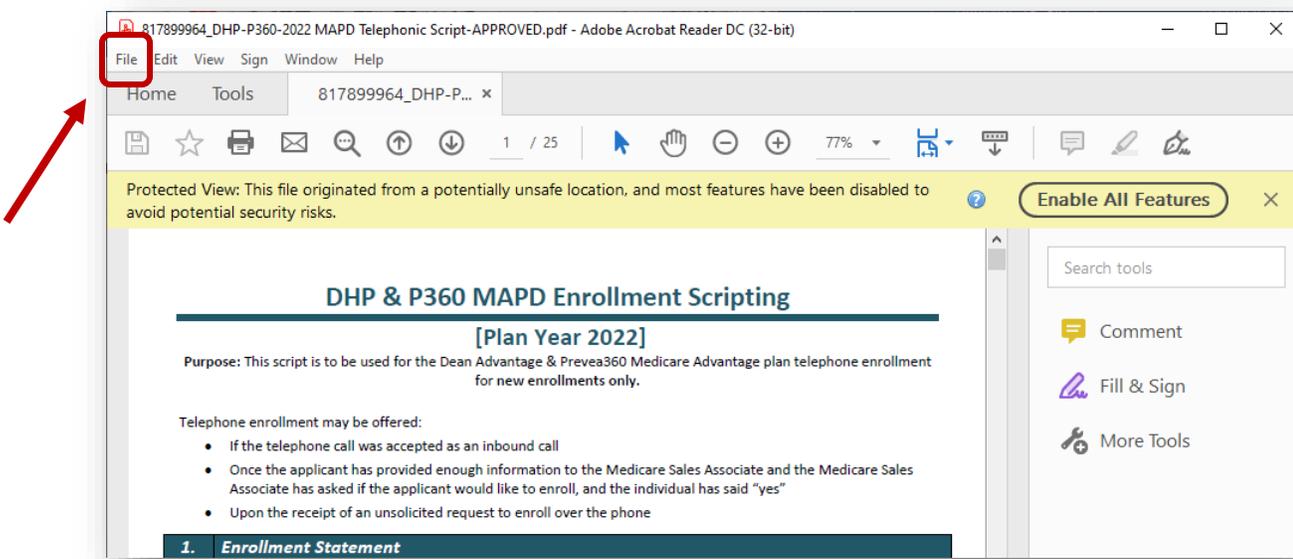
27. Click on the document you want to view by either clicking on the name of the document or the ">" arrow



28. Click on the "link" icon to open the document externally



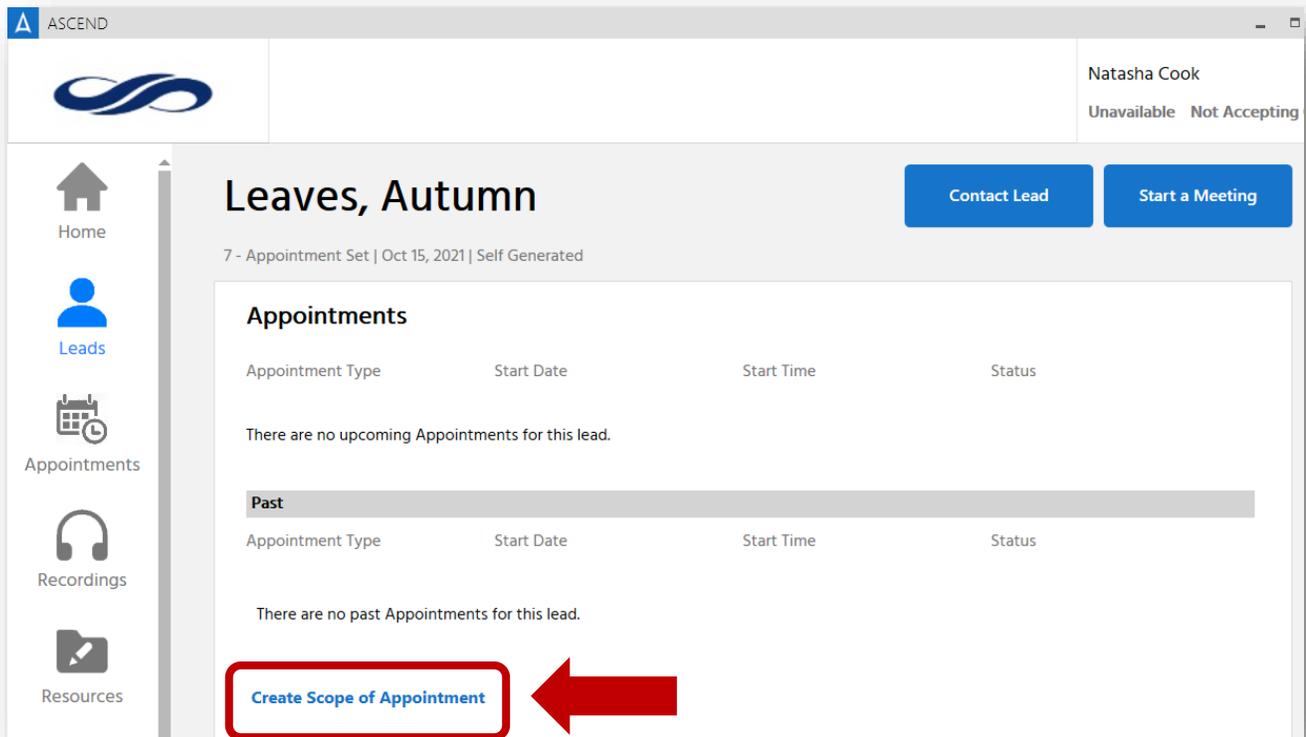
29. Next will bring up the PDF for you to save in your documents:



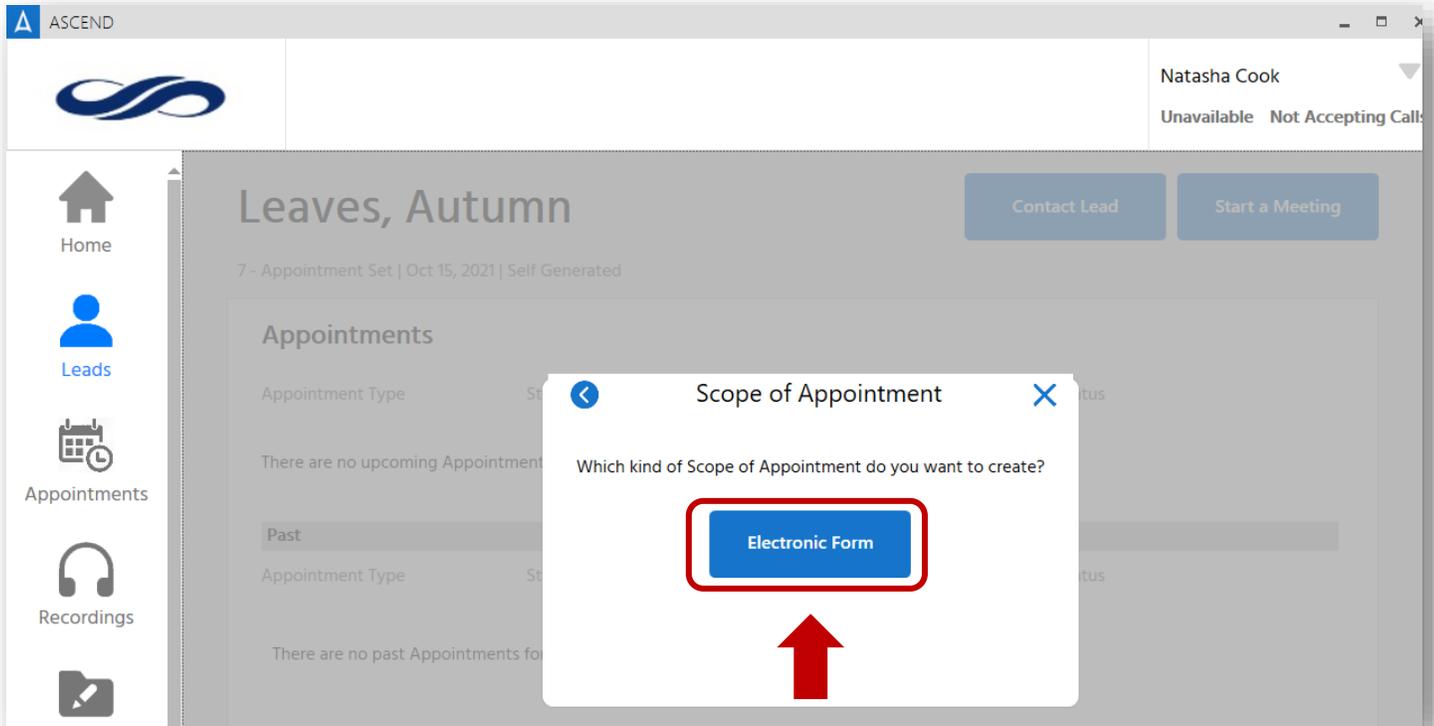
Sending an Electronic Scope of Appointment (eSOA)

30. Click on the lead you want to send an eSOA to

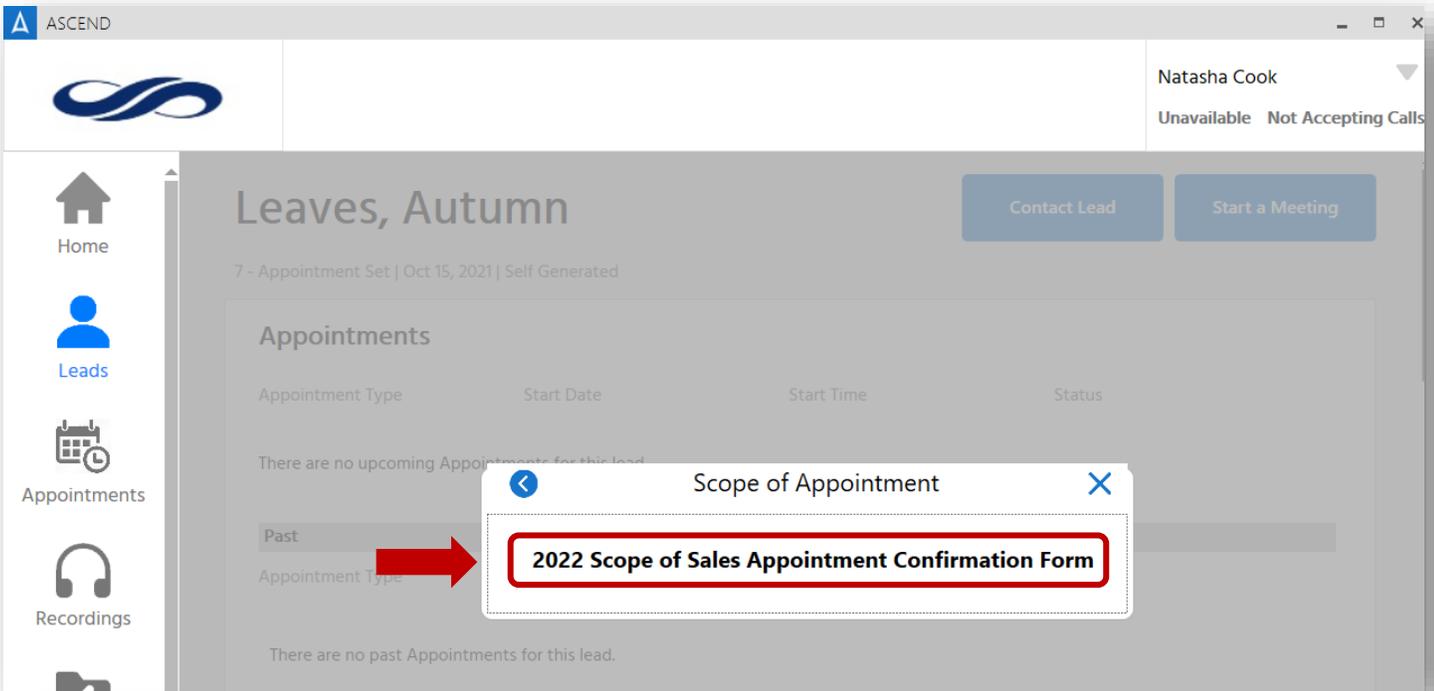
31. Once you are in your lead, click on the "Create Scope of Appointment" hyperlink



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

The screenshot shows the 'Scope of Appointment' screen. At the top, there is a zoom slider labeled 'Zoom' with a red box around it. Below the zoom slider, there is a scroll bar on the right side, also with a red box around it. A callout box points to the scroll bar with the text: "You'll have to use the scroll bar to add/view the rest of the SOA". The main content area contains three plan options, each with a checked checkbox:

- 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.
- 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.
- 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.

At the bottom, there is a section titled "Please read and sign below." with a disclaimer: "By signing this you are agreeing to a sales meeting with a sales agent to discuss the specific types of".

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

The screenshot shows the 'Scope of Appointment' screen. At the top, there is a zoom slider labeled 'Zoom'. Below the zoom slider, there is a scroll bar on the right side. The main content area contains the following text:

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* Autumn Leaves

Date* 10/15/2021

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

First Name	<input type="text"/>	Last Name	<input type="text"/>
Home Phone Number	<input type="text"/>	Address	<input type="text"/>
City	<input type="text"/>	State	<input type="text"/>
ZipCode	<input type="text"/>	County	<input type="text"/>
Relationship to Enrollee	<input type="text"/>		

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

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

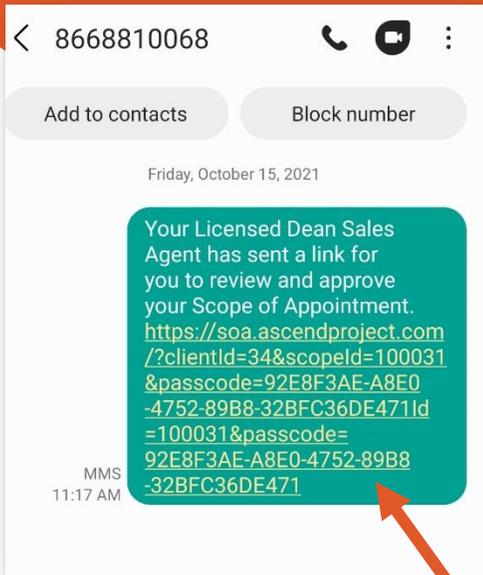
The screenshot shows a mobile application interface for a "Scope of Appointment" form. At the top, there is a zoom slider and a close button (X). The form contains several input fields for beneficiary information: Beneficiary First Name* (Autumn), Beneficiary Last Name* (Leaves), Beneficiary phone* (6083938670), Beneficiary Address (1277 Deming way), Beneficiary City (Madison), Beneficiary State (Wisconsin), Beneficiary ZipCode (53717), and Beneficiary County (Dane). Below these are fields for Agent Signature* (Natasha Cook) and Date of Appointment* (10/15/2021), both of which are highlighted with red boxes. Underneath is a section titled "REASON SOA WAS NOT COMPLETED PRIOR TO APPOINTMENT (please check all that apply)" with four radio button options: Unplanned attendee, Walk-in (checked), New SOA required, and Other. There is also a text input field for "If Other, Please Explain:". The form is partially obscured by a grey overlay on the left side.

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

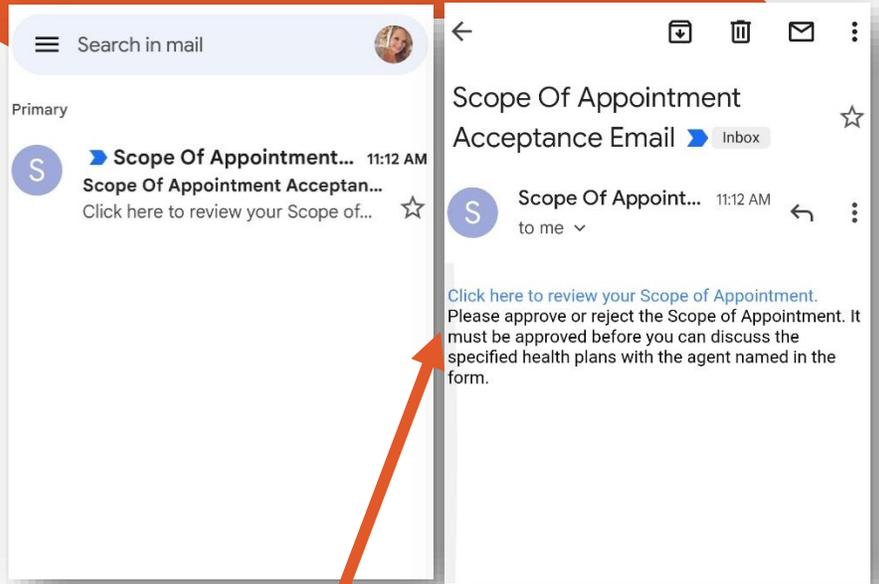
This screenshot shows the bottom portion of the "Scope of Appointment" form. The "Agent Signature*" (Natasha Cook) and "Date of Appointment*" (10/15/2021) fields are visible. The "REASON SOA WAS NOT COMPLETED PRIOR TO APPOINTMENT" section is also visible, with the "Walk-in" option checked. At the bottom, there are two checkboxes: "Send Email on Submit" (checked) and "Send Text on Submit" (checked). A blue "Cancel" button is on the left, and a blue "Submit" button is on the right, highlighted with a red box and a red arrow pointing to it from the left. The form is partially obscured by a grey overlay on the left side.

38. Your client will get the below notifications:

Emailed eSOA Notification



Emailed eSOA Notifications



Your Client will click the hyperlinks in their email or text

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.

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.

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.

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:

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:

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:

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

The screenshot shows the ASCEND software interface. At the top, the user's name is "Natasha Cook" and their status is "Unavailable Not Accepting". The main heading is "Leaves, Autumn". Below this, there are two buttons: "Contact Lead" and "Start a Meeting". The interface displays a table of appointments for a lead. The table has columns for "Appointment Type", "Start Date", "Start Time", and "Status". Two rows are visible, both for "Scope of Appointment" on "Oct 15, 2021" at "12:00 AM". The first row has a status of "Accepted" and the second row has a status of "Declined". A red box highlights these two rows. Below the table, there is a section for "Past" appointments, which is currently empty, with the text "There are no past Appointments for this lead."

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

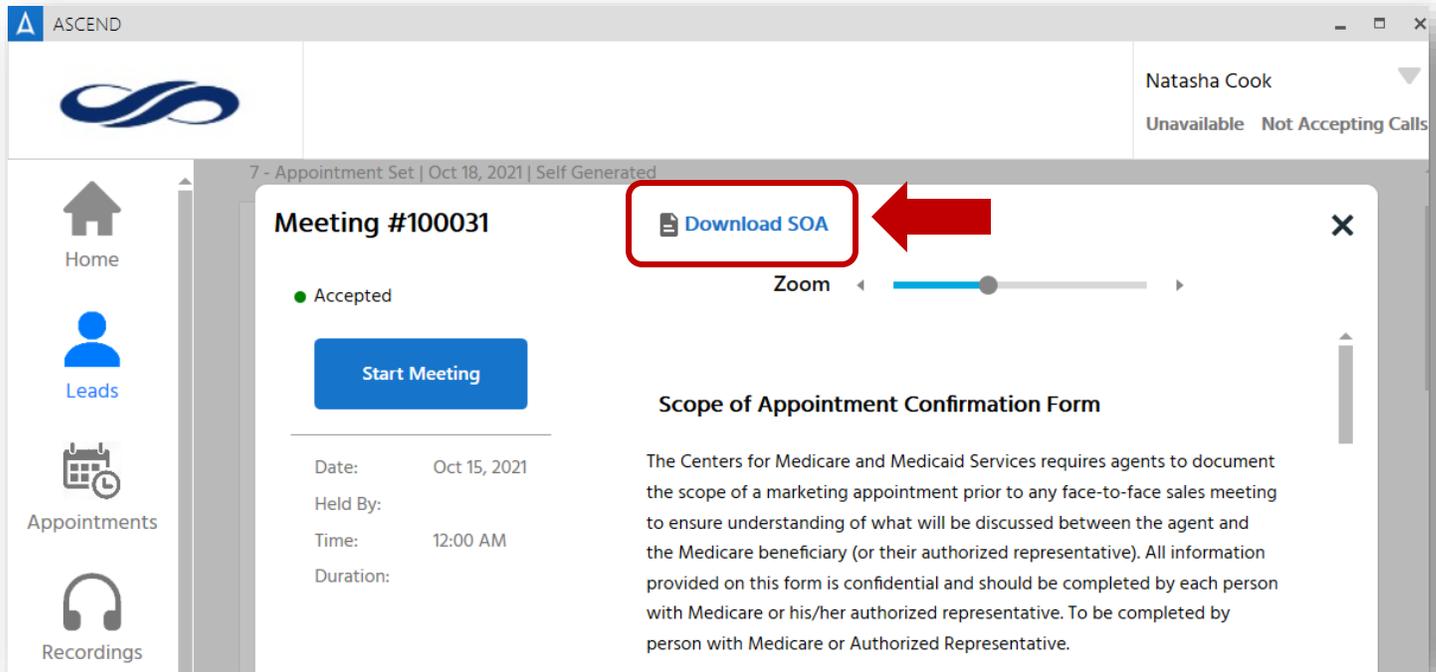
How to access eSOA's

45. Go into your lead that you sent the eSOA to

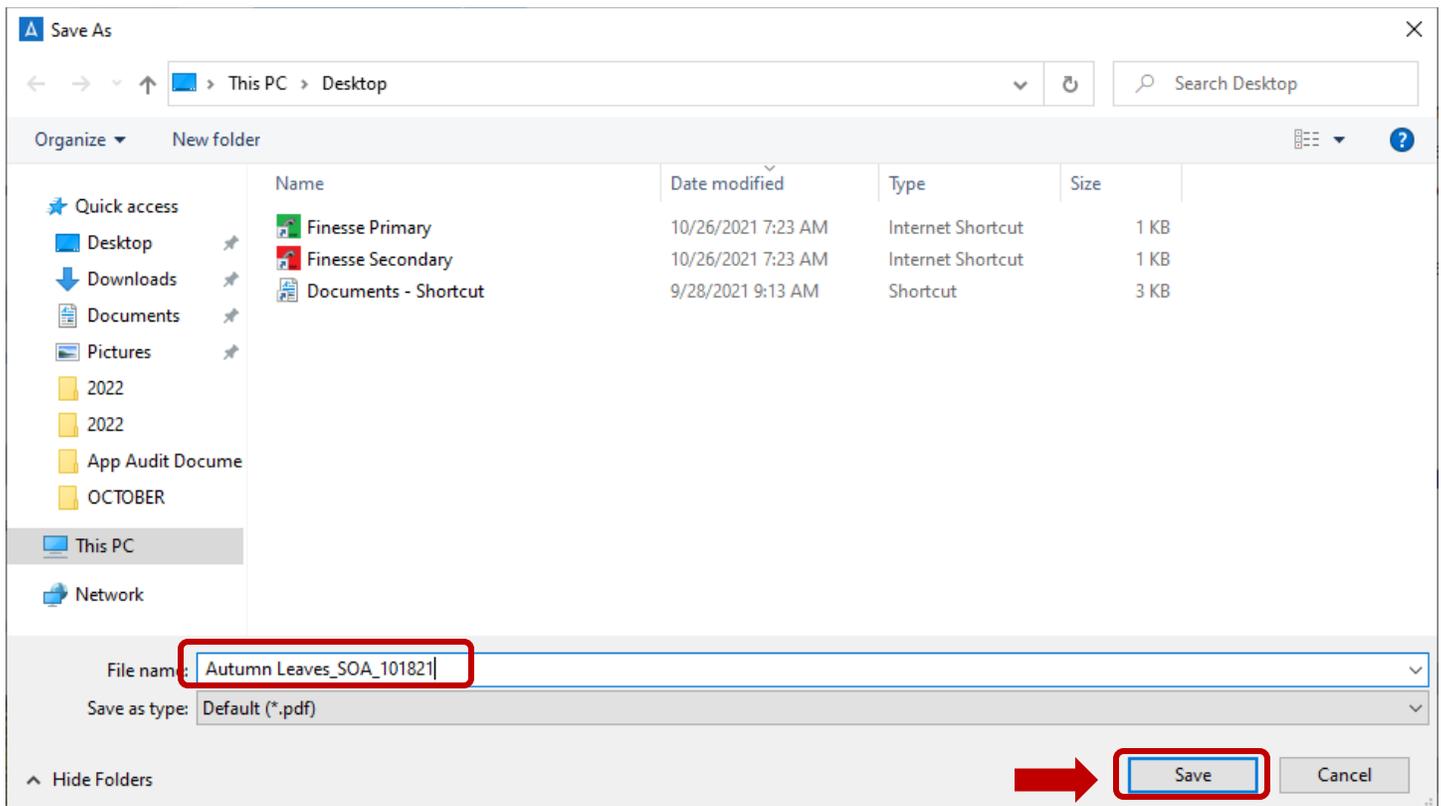
46. Under "Appointments", click on the approved Scope of Appointment

The screenshot shows the ASCEND software interface. At the top, the user's name is "Natasha Cook" and their status is "Unavailable Not Accepting". The main heading is "Leaves, Autumn". Below this, there are two buttons: "Contact Lead" and "Start a Meeting". The interface displays a table of appointments for a lead. The table has columns for "Appointment Type", "Start Date", "Start Time", and "Status". Two rows are visible, both for "Scope of Appointment" on "Oct 15, 2021" at "12:00 AM". The first row has a status of "Accepted" and the second row has a status of "Declined". A red box highlights the first row. Below the table, there is a section for "Past" appointments, which is currently empty, with the text "There are no past Appointments for this lead." At the bottom of the interface, there is a button labeled "Create Scope of Appointment".

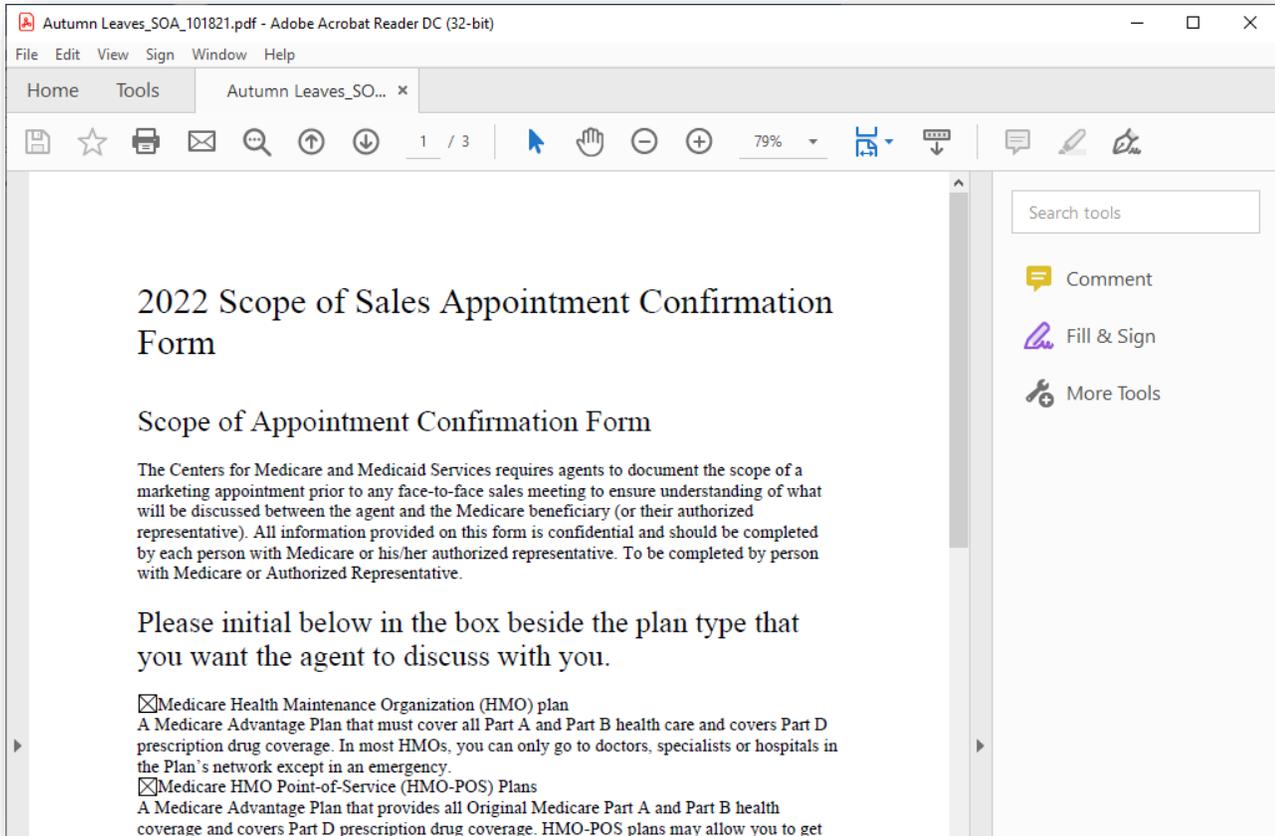
47. Click on the “Download SOA” button



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

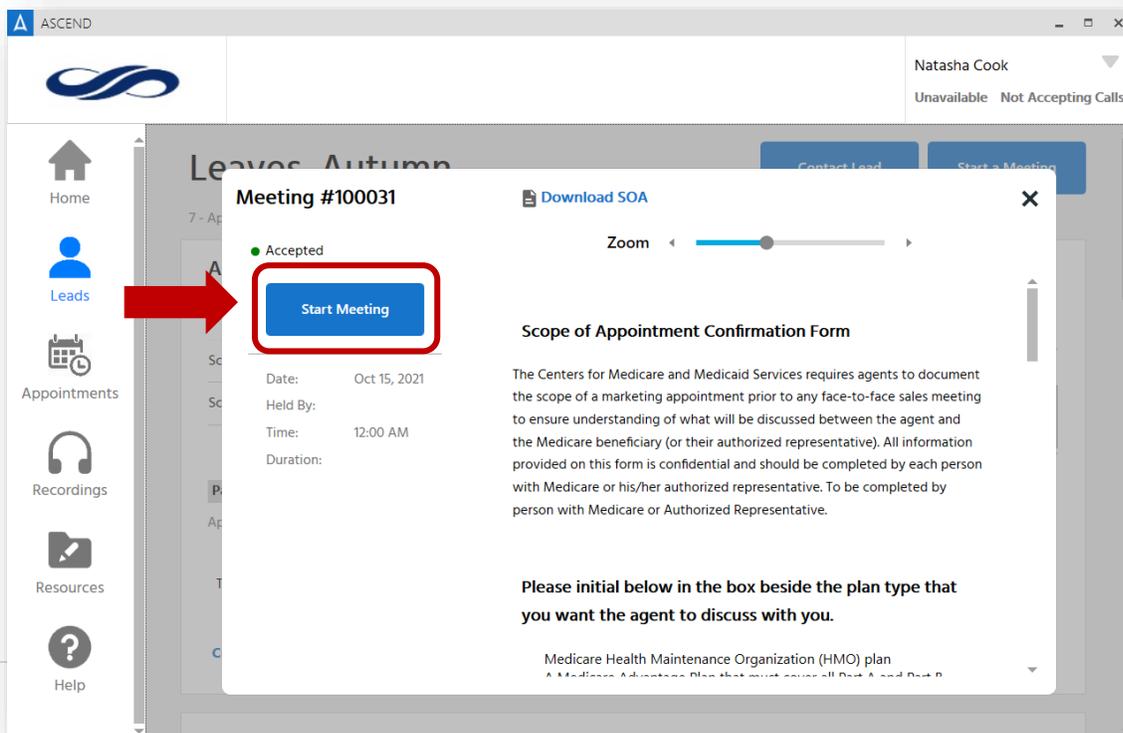


49. The document will be saved as a PDF. Dean Health Plan Administrators have access to view all eSOA's so you don't have to worry about sending the eSOA to us

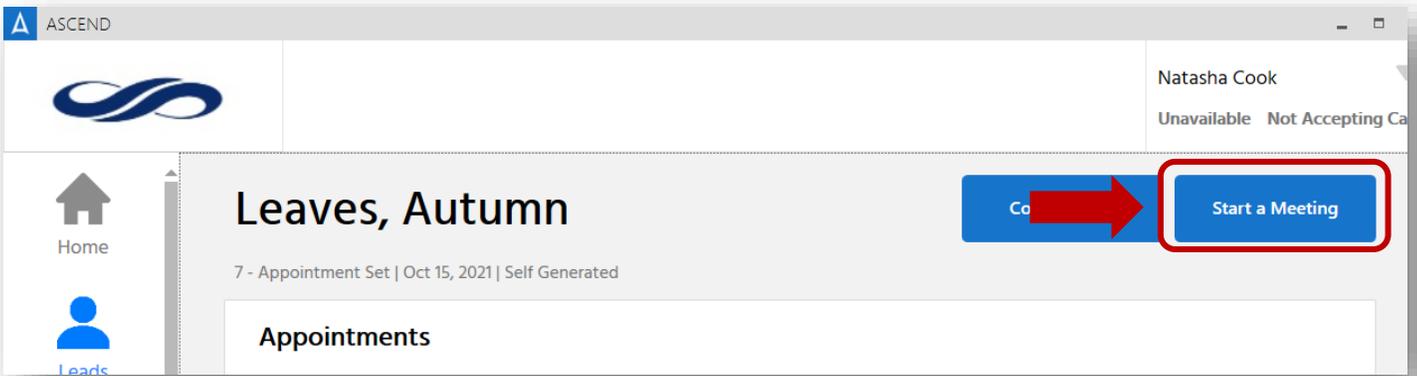


Starting a Meeting

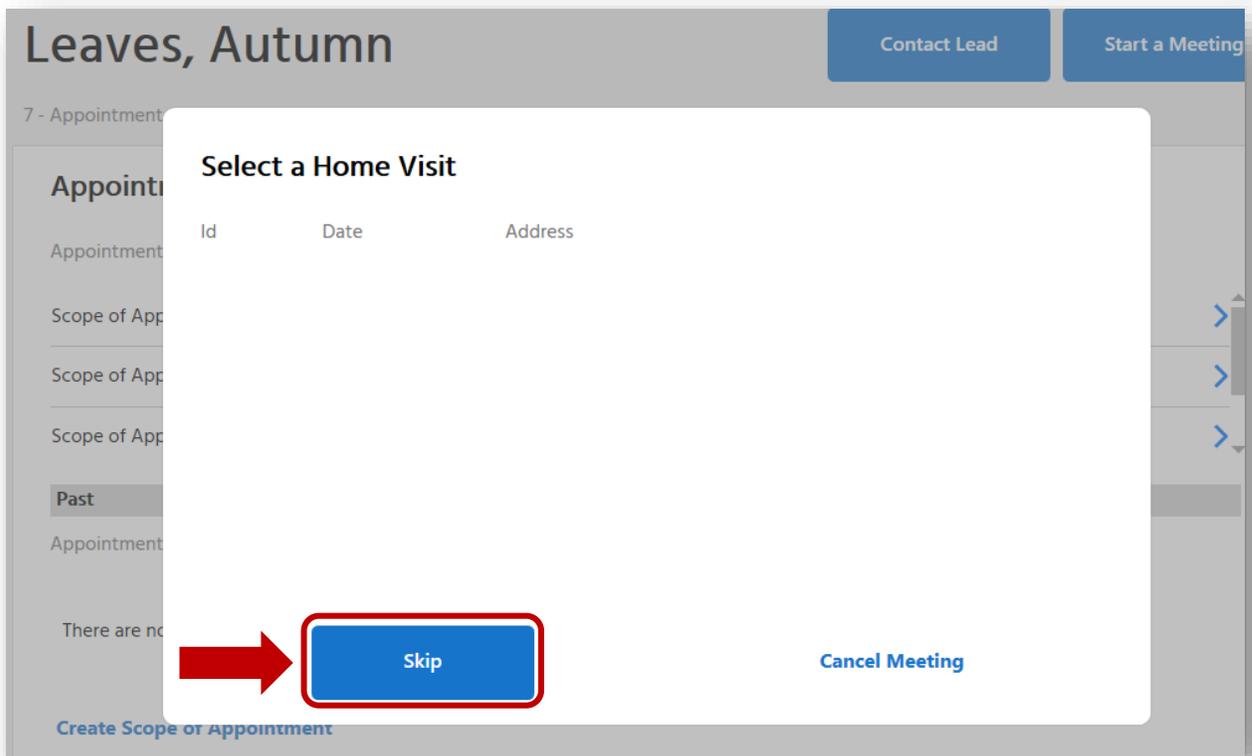
50. Starting from **step 37**, click on the “**Start Meeting**” button



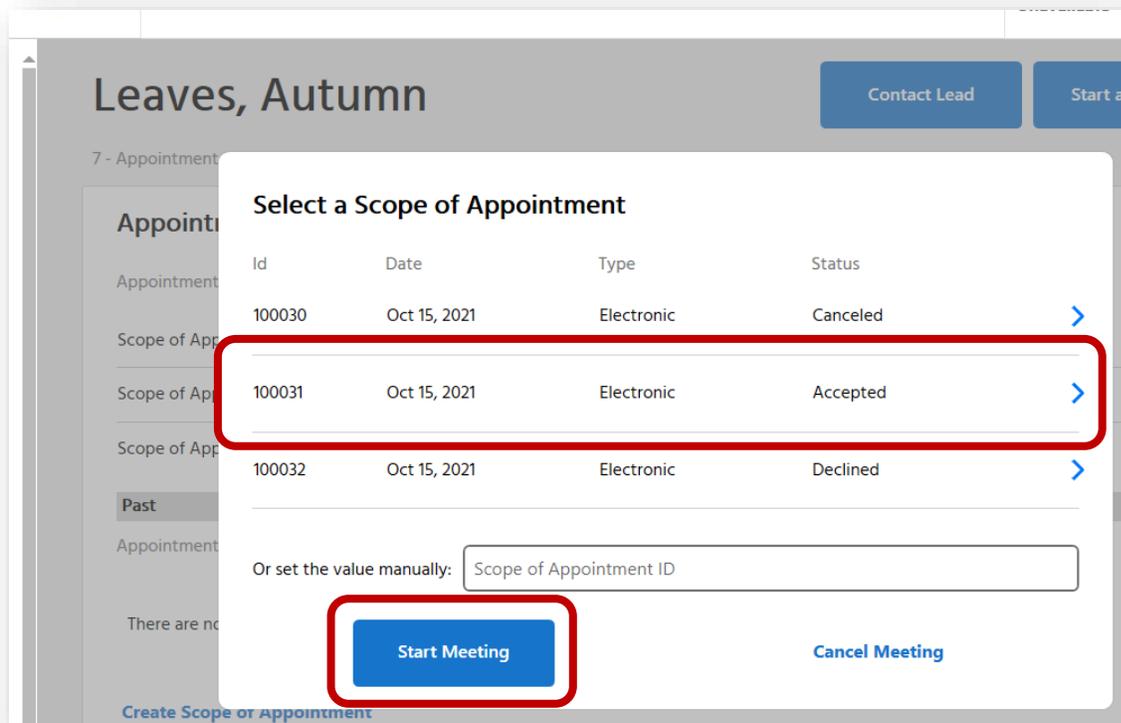
51. If you have already obtained an SOA and want to start a meeting directly from the lead, click on the lead that you have your meeting set with and click on the “**Start Meeting**” button as well



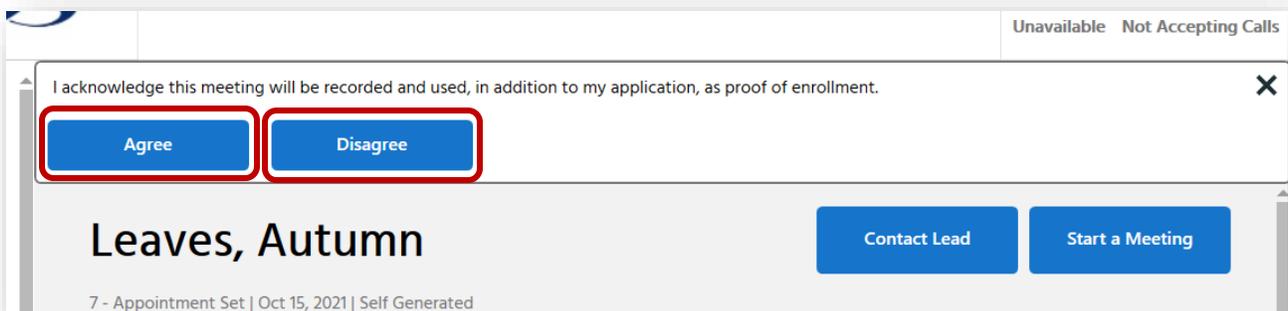
52. Skip the “**Select a Home Visit**” section – we don’t use this feature



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

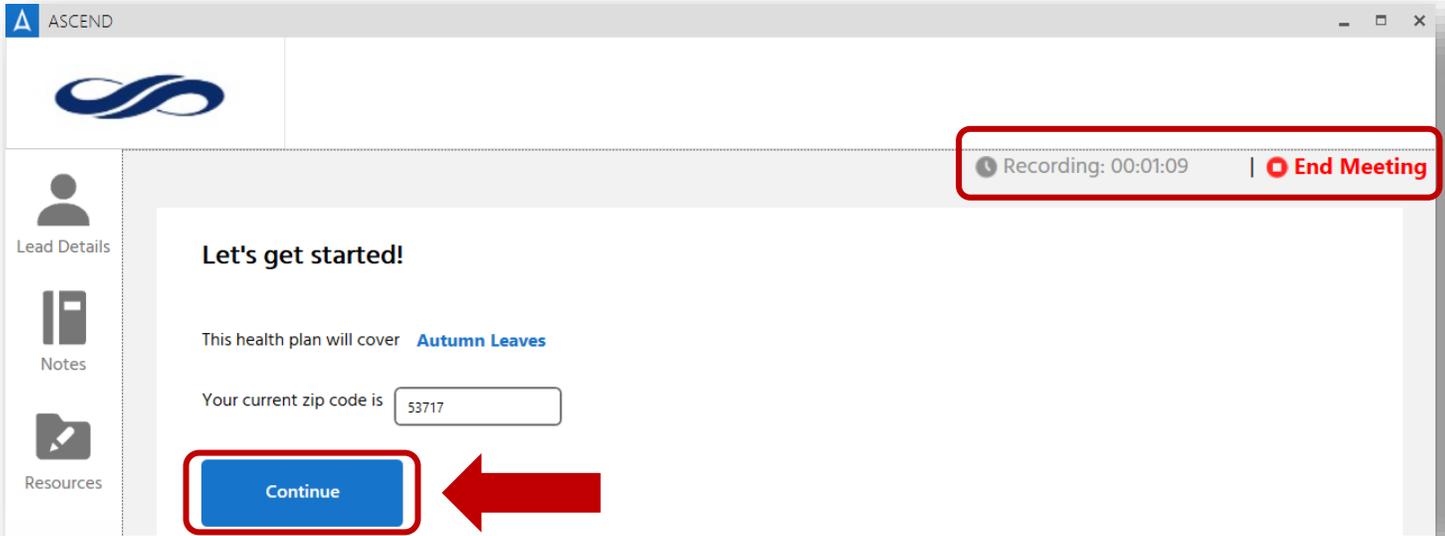


54. The next pop up will be the **Recording Disclaimer**, here you would click on “**Agree**” or “**Disagree**”
- a. This is not a requirement; however, its recommended to cover yourself should your Client file a complaint or grievance
 - i. Click **Agree**: If you want your meeting recorded simply ask 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



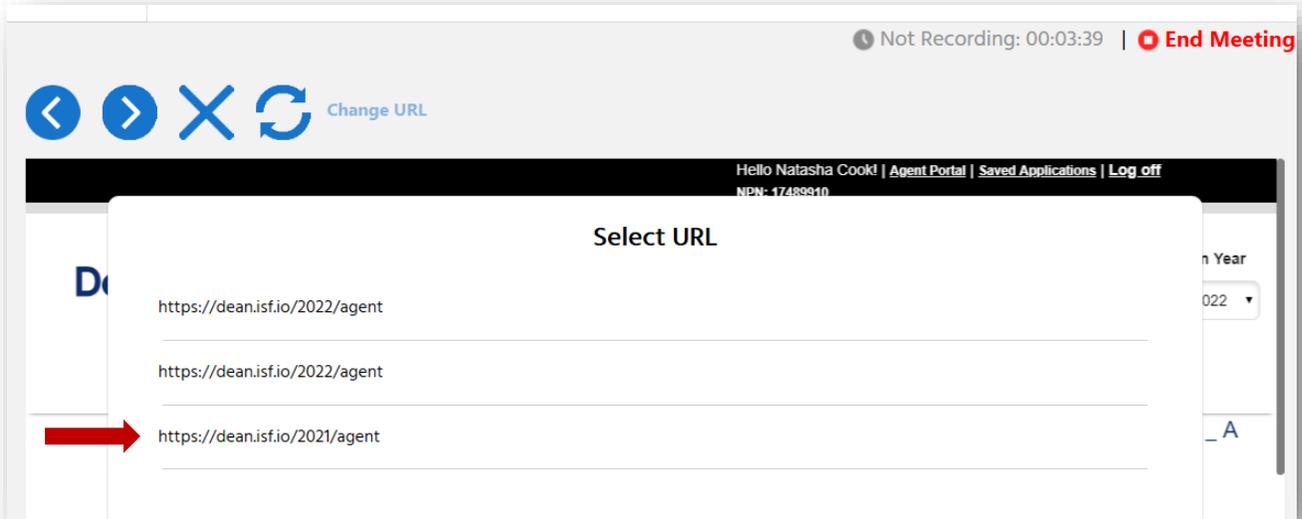
Switching Plan Years

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



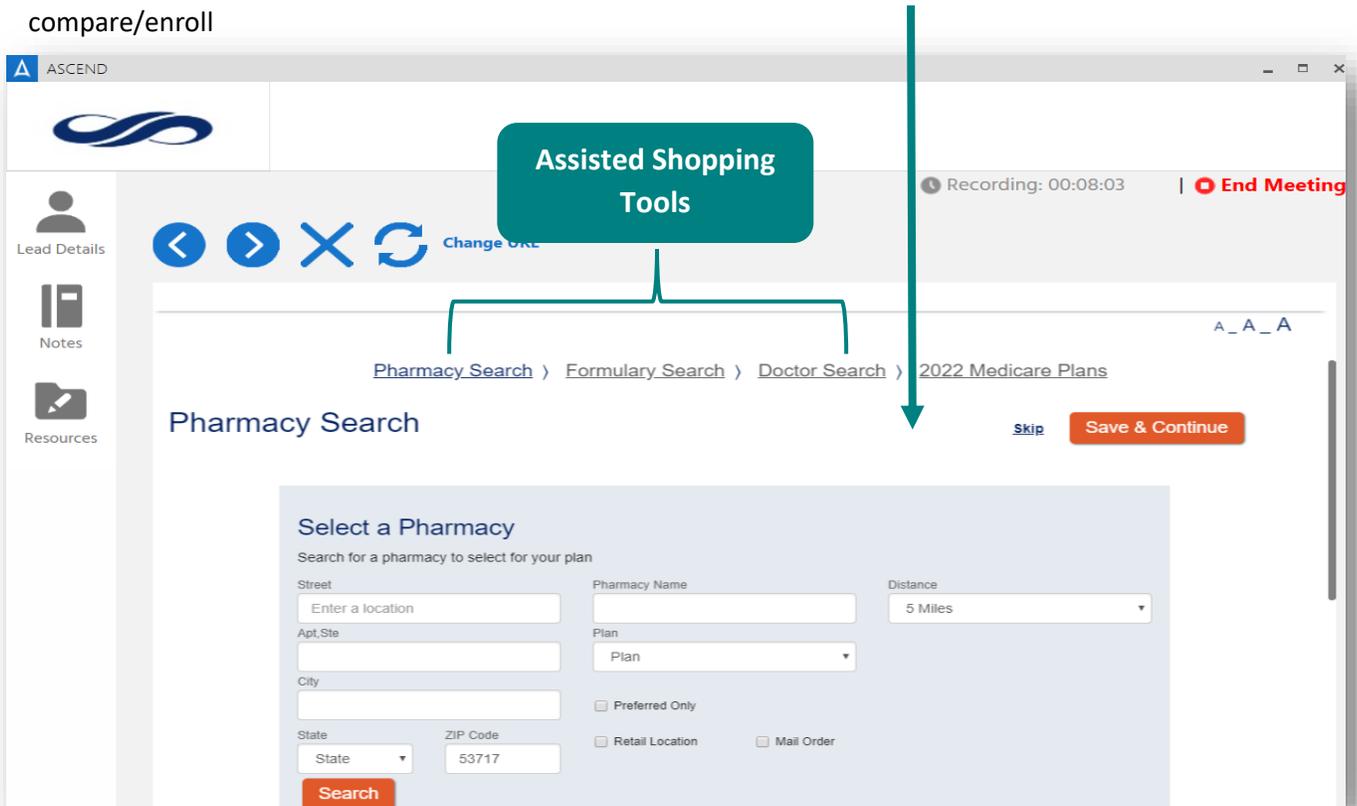
- 59. From the drop down click on the appropriate year
 - a. Please note that you will only see the years that you are certified to sell for



- 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

The screenshot shows a web interface for a Pharmacy Search. At the top, there are navigation links: Pharmacy Search, Formulary Search, Doctor Search, and 2022 Medicare Plans. Below these is the title 'Pharmacy Search' and two buttons: 'Skip' and 'Save & Continue'. The main form is titled 'Select a Pharmacy' and contains the following fields and options:

- Street: Enter a location
- Pharmacy Name: [Text input]
- Distance: 10 Miles (dropdown menu)
- Apt. Ste: [Text input]
- Plan: Plan (dropdown menu)
- City: [Text input]
- State: [Dropdown menu]
- ZIP Code: 53717
- Preferred Only:
- Retail Location:
- Mail Order:
- Search: [Red button]

A red arrow points to 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

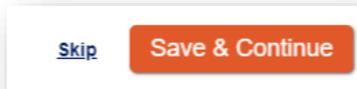
The screenshot displays the search results for pharmacies. The list shows 1 to 10 of 102 pharmacies. The results are as follows:

Pharmacy Name	Address	Distance	Preferred
SSM HEALTH PHARMACY	310 Integrity Dr Madison, WI 53717	0.09 miles	No
SSM HEALTH PRESCRIPTION CENTER	752 N High Point Rd Madison, WI 53717	0.39 miles	Yes
UW HEALTH PHARMACY SERVICES	451 Junction Rd Madison, WI 53717	0.4 miles	No
CONCENTRA-MADISON WEST	358 Junction Rd Madison, WI 53717	0.52 miles	No
WALGREENS #7536	8302 Old Sauk Rd Middleton, WI 53562	0.58 miles	Yes
CVS PHARMACY #16445	201 Junction Rd Madison, WI 53717	0.69 miles	No

A red arrow points to the 'SSM HEALTH PRESCRIPTION CENTER' entry. A callout box labeled 'Preferred Pharmacy Indicator' points to the star icon next to the preferred pharmacies.

The map on the right shows the location of the pharmacies in the Middleton, WI area. A callout box labeled 'Preferred Pharmacy Indicator' points to the star icon on the map.

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

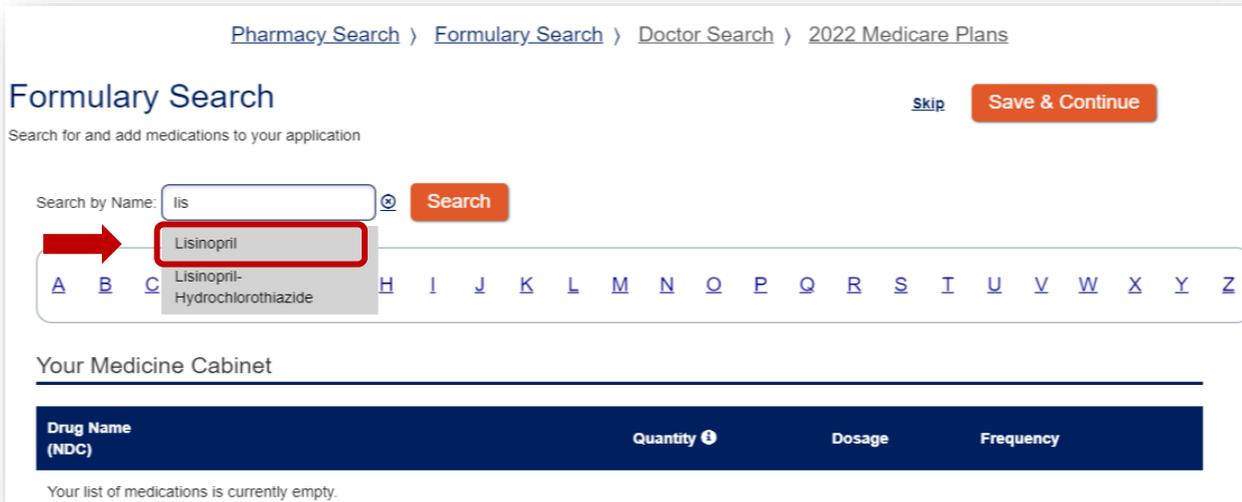


Formulary Search

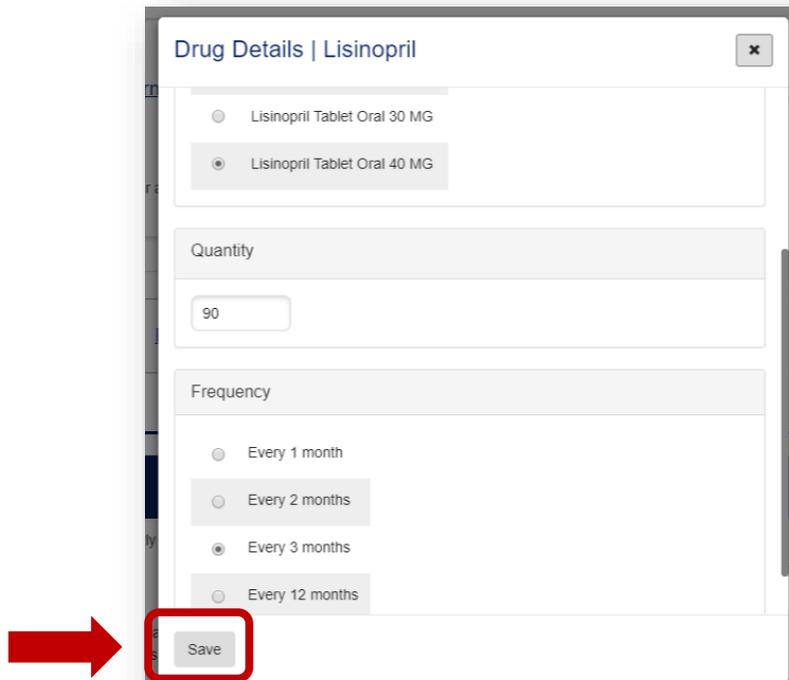
68. The formulary search, allows you to enter your clients medications to see how they price out on our plans

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 Ocusol 24208049605	1 X Plas Cont of 60 Solution	Timolol Maleate Ocusol 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

The screenshot shows a 'Doctor's Details' form with several sections: 'Gender' (dropdown), 'New Patients' (dropdown), 'Services & Coverage' (Primary Care Provider dropdown, In/Out of Network dropdown, Plan Name dropdown), 'Specialty' (text input), and 'Location' (Street, Apt, Ste, City, State dropdown). A red box highlights the 'Primary Care Provider' dropdown menu, which is currently set to 'Yes'. Another red box highlights the 'Search' button at the bottom right of the form, with a red arrow pointing to it from the right.

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

Select for Comparison

Compare

ZIP Code: 53717 Update

Here is a detailed list of plans available in your area. Check the box next to the plans you wish to compare and then click on the Compare button. This will allow you to compare additional plan details side-by-side.

Medicare Advantage

Selected

Dean Advantage Essential (HMO)

Senior Savings Plan

Essential (HMO)

Annual Premium
\$0.00

Max Enrollee Out-of-Pocket
\$6,500

In-Network Copay
Primary Care: \$0
Specialist Office Visit: \$50
Emergency Care: \$90

Includes
Out-of-Network Coverage: No
In-Home Support: Yes
Rx: Yes
Comprehensive Dental: Yes
OTC: Yes
Part B Premium Reduction: No

Annual Drug Costs & Savings
Estimated Costs: \$0.00
Estimated Savings: \$115.20
[Monthly Breakdown](#)

\$0.00 per month

Apply Now

[View Details](#)

Selected

Dean Advantage Assurance (HMO-POS)

Senior Savings Plan

Essential (HMO)

Assurance (HMO-POS)

Apply Now

View Details/Comparison

82. Click on the “View Details” link underneath the plan you are looking for details for

Select for Comparison

Dean Advantage Essential (HMO)

Senior Savings Plan

Essential (HMO)

Annual Premium
\$0.00

Max Enrollee Out-of-Pocket
\$6,500

In-Network Copay
Primary Care: \$0
Specialist Office Visit: \$50
Emergency Care: \$90

Includes
Out-of-Network Coverage: No
In-Home Support: Yes
Rx: Yes
Comprehensive Dental: Yes
OTC: Yes
Part B Premium Reduction: No

Annual Drug Costs & Savings
Estimated Costs: \$0.00
Estimated Savings: \$115.20
[Monthly Breakdown](#)

View Details

Comparing Plans

[Back to Quotes](#)

Plan Specifics

	Essential (HMO)	Assurance (HMO-POS)
Plan Name	Dean Advantage Essential (HMO)	Dean Advantage Assurance (HMO-POS)
Monthly Plan Premium	\$0.00	\$40.00
Star Rating	★★★★★	★★★★★

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

Select for Comparison

Dean Advantage Essential (HMO)

Senior Savings Plan

Essential (HMO)

Annual Premium: \$0.00
Max Enrollee Out-of-Pocket: \$6,500
In-Network Copay: Primary Care: \$0, Specialist Office Visit: \$50, Emergency Care: \$90

\$0.00 per month

Apply Now

Includes: Out-of-Network Coverage: No, In-Home Support: Yes, Rx: Yes, Comprehensive Dental: Yes, OTC: Yes, Part B Premium Reduction: N

Annual Drug Costs & Savings: Estimated Costs: \$0.00, Estimated Savings: \$115.20

Monthly Breakdown

Back to Quotes

Comparing Plans

Plan Specifics

	Essential (HMO)	Assurance (HMO-POS) SSM Presence (HMO-POS)
Plan Name	Dean Advantage Essential (HMO)	Dean Advantage Assurance (HMO-POS)
Monthly Plan Premium	\$0.00	\$40.00
Star Rating	★★★★★	★★★★★

Apply Now

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

The image shows a screenshot of a web application's 'Personal Information' form. At the top, there is a navigation bar with tabs for 'Personal Information', 'Address', 'Primary Care Provider', 'Insurance Information', 'Election Period', 'Payment', and 'Important Questions'. The 'Election Period' tab is currently selected. Below the navigation bar, the form is titled 'Personal Information' and contains several input fields: 'Prefix' (a dropdown menu), 'First Name *' (text input with 'Autumn'), 'Middle Initial' (text input), 'Last Name *' (text input with 'Leaves'), 'Sex *' (radio buttons for 'Male' and 'Female', with 'Female' selected), 'Birthdate *' (text input with '11/20/1956'), 'Phone *' (text input with '6083938670'), and 'Alternate Phone' (text input with '6083938670'). A red box highlights the 'First Name', 'Middle Initial', 'Last Name', 'Sex', 'Birthdate', 'Phone', and 'Alternate Phone' fields. At the bottom left of the form, there is a red arrow pointing to a 'Next' button. A red asterisk indicates required information.

Address:

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

Permanent Residence Address (P. O. Box is not allowed):

Address 1 * 1277 Deming way

Address 2

City * Madison

State * Wisconsin

Zip * 53717

County Dane

Mailing Address (Only if different than Permanent Residence Address)

You may add a mailing address should they have a different address than where they reside

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

[Provider Lookup](#)

Primary Care Provider ID (PCP ID) 1043257348

Provider First Name Melissa

Provider Last Name Allan

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

Primary Care Provider ID (PCP ID) 1043257348

Provider First Name Melissa

Provider Last Name Allan

Current Patient Yes No

Office Address

Address 1 752 N High Point Rd

Address 2

City Madison

State Wisconsin

Zip 53717-2236

County

Back Next

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

- Note:** Be sure that you are re-reading the MBI back to your client to make sure you have entered it correctly
- 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

Personal Information Address Primary Care Provider Insurance Information Election Period Payment Important Questions Submit

Medicare 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 * 12AB34CD56EF

Hospital Part A Effective Date * 11/01/2021

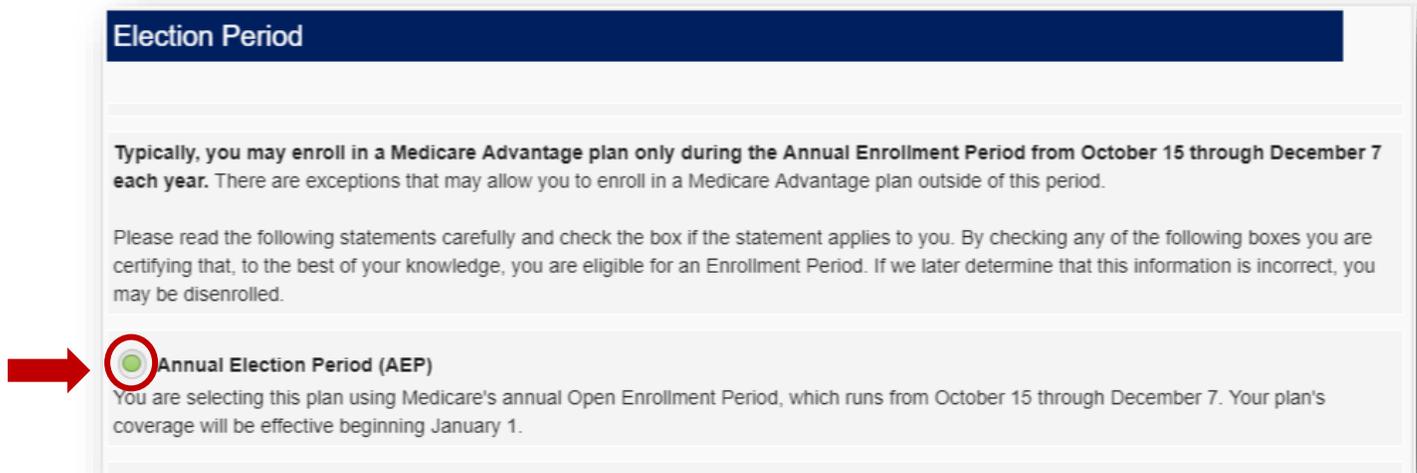
Medical Part B Effective Date * 11/01/2021

* Required Information

Back Next

Election Period

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



Election Period

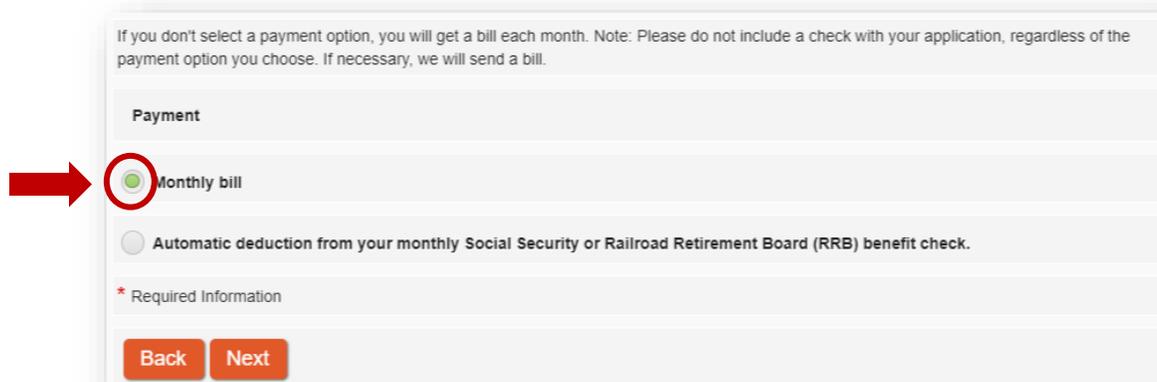
Typically, you may enroll in a Medicare Advantage plan only during the Annual Enrollment Period from October 15 through December 7 each year. There are exceptions that may allow you to enroll in a Medicare Advantage plan outside of this period.

Please read the following statements carefully and check the box if the statement applies to you. By checking any of the following boxes you are certifying that, to the best of your knowledge, you are eligible for an Enrollment Period. If we later determine that this information is incorrect, you may be disenrolled.

Annual Election Period (AEP)
You are selecting this plan using Medicare's annual Open Enrollment Period, which runs from October 15 through December 7. Your plan's coverage will be effective beginning January 1.

Payment

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



If you don't select a payment option, you will get a bill each month. Note: Please do not include a check with your application, regardless of the payment option you choose. If necessary, we will send a bill.

Payment

Monthly bill

Automatic deduction from your monthly Social Security or Railroad Retirement Board (RRB) benefit check.

* Required Information

Back **Next**

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

Personal Information Address Primary Care Provider Insurance Information Election Period Payment **Important Questions** Submit

Please read and answer these important questions:

1. Will you have other prescription drug coverage in addition to Dean Health Plan? *

Yes No

Some individuals may have other drug coverage, including other private insurance, TRICARE, Federal Employee Health Benefits coverage, VA benefits or State pharmaceutical assistance programs.

Please list your other coverage and your identification (ID) number(s) for this coverage

Name *

ID# *

Group# *

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

Yes No

3. Are you enrolled in your State Medicaid program? *

Yes No

4. Do you work? *

Yes No

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”

Please select the statement below that best describes your relationship to the person with Medicare listed on this enrollment form.

I am the person listed on this enrollment form or I am simply helping to complete this enrollment form.

- 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”***

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.

First Name *

Last Name *

Relationship to Enrollee *

Phone *

Address 1 *

Address 2

City *

State *

Zip *

County

You will be able to review the application before submission on the next page.

103. Next, Click on the “Next” button

Please select the statement below that best describes your relationship to the person with Medicare listed on this enrollment form.

I am the person listed on this enrollment form or I am simply helping to complete this enrollment form.

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.

You will be able to review the application before submission on the next page.

* Required Information



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

Apply Now

Please review the application details below to verify accuracy. If updates are needed, use the **Edit** button to make changes. To submit your application, simply click the **Apply Now** button. If your web browser is closed prior to clicking **Apply Now**, the application will not be submitted.

Personal Information  **Edit**

First Name: Autumn
Last Name: Leaves
Sex: Female
Birthdate: 11/20/1956
Phone: 6083938670
Alternate Phone: 6083938670

Address **Edit**

Address 1: 1277 Deming way
City: Madison
State: WI
Zip: 53717
County: Dane

Primary Care Provider **Edit**

Primary Care Provider ID (PCP ID): 1043257348
Provider First Name: Melissa
Provider Last Name: Allan
Current Patient: No

Insurance Information **Edit**

Medicare Number: 12AB34CD56EF
Hospital Part A Effective Date: 11/01/2021
Medical Part B Effective Date: 11/01/2021

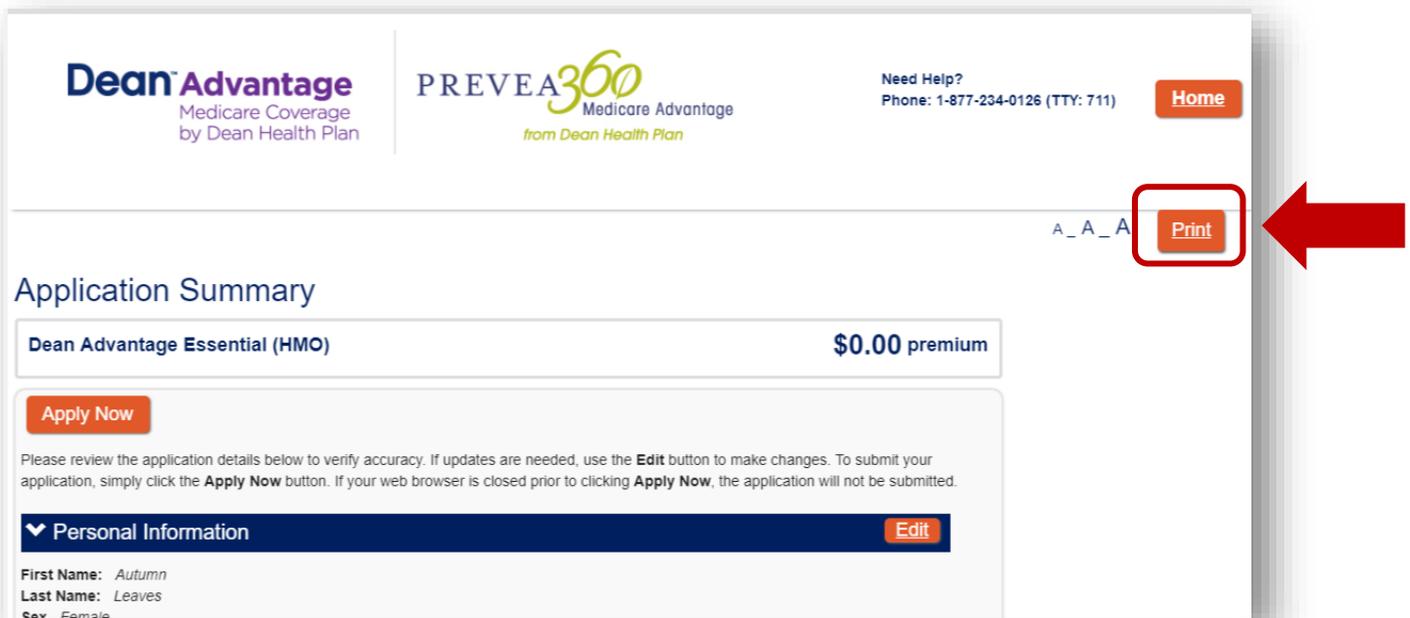
Election Period **Edit**

Annual Election Period (AEP) AEP

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

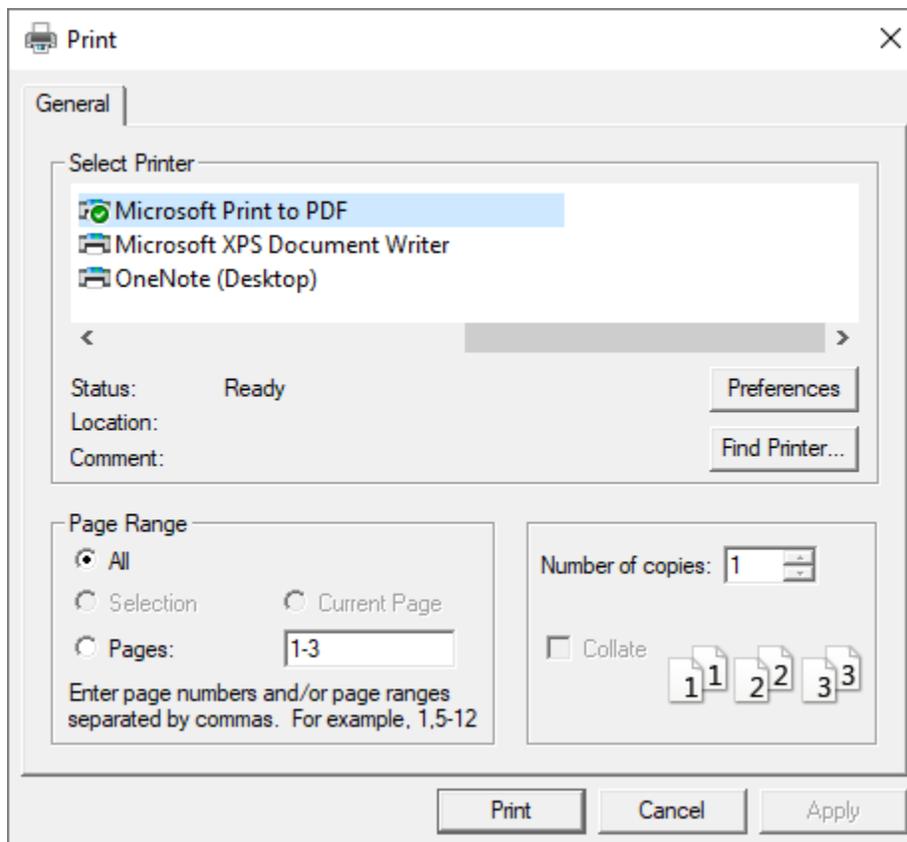
Saving PDF of the Application

107. Click on the “Print” button



The screenshot shows the top navigation bar of the Dean Advantage website. On the left is the Dean Advantage logo with the text "Medicare Coverage by Dean Health Plan". In the center is the PREVEA360 logo with "Medicare Advantage from Dean Health Plan". On the right, there is a "Need Help?" section with the phone number "1-877-234-0126 (TTY: 711)" and a "Home" button. Below the navigation bar, there is a "Print" button highlighted with a red square and a red arrow pointing to it from the right. The main content area is titled "Application Summary" and shows "Dean Advantage Essential (HMO)" with a "\$0.00 premium" label. There is an "Apply Now" button and a paragraph of text: "Please review the application details below to verify accuracy. If updates are needed, use the Edit button to make changes. To submit your application, simply click the Apply Now button. If your web browser is closed prior to clicking Apply Now, the application will not be submitted." Below this is a "Personal Information" section with an "Edit" button and fields for "First Name: Autumn", "Last Name: Leaves", and "Sex: Female".

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



The screenshot shows the Windows "Print" dialog box. The "General" tab is selected. Under "Select Printer", "Microsoft Print to PDF" is selected. Other printers listed are "Microsoft XPS Document Writer" and "OneNote (Desktop)". The status is "Ready". There are "Preferences" and "Find Printer..." buttons. Under "Page Range", the "All" radio button is selected. The "Number of copies" is set to 1. The "Collate" checkbox is checked. At the bottom, there are "Print", "Cancel", and "Apply" buttons.

109. When everything is entered in accurately, click on the “Apply Now” button

Application Summary

Dean Advantage Essential (HMO) \$0.00 premium

Apply Now

Please review the application details below to verify accuracy. If updates are needed, use the **Edit** button to make changes. To submit your application, simply click the **Apply Now** button. If your web browser is closed prior to clicking **Apply Now**, the application will not be submitted.

Personal Information **Edit**

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

Dean Advantage Medicare Coverage by Dean Health Plan

PREVEA360 Medicare Advantage from Dean Health Plan

Need Help? Phone: 1-877-234-0126 (TTY: 711) **Home**

A_A_A **Email**

You have completed your application for Dean Advantage Essential (HMO)

Your confirmation number is: **653**

If you would like this confirmation number emailed to you, please click the email button on the top right side of this page and enter your email address. 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.

Please keep this number for your records.

If you have any questions about your pending application, please call Dean Health Plan at the number listed below and have your confirmation number above for reference.

Click the button below for a summary of the information entered on the application.

Print

Confirmation of Application

Dean Advantage Enrollment <donotreply@confirmations.isf.io>
To: Cook, Natasha

Retention Policy Personal Folders (1 year, 5 months) Expires 4/11/2023

Mon 10/18/2021 1:17 PM

Reply Reply All Forward

CAUTION: This email originated from outside of the SSM Health organization. Do not click links or open attachments unless you recognize the sender and know the content is safe. Questions? Contact the TSC at 314-644-7345 or your local Help Desk.

Hello Natasha,

You have successfully submitted an application for Dean Advantage Essential (HMO) on 10/18/2021 13:16:29.

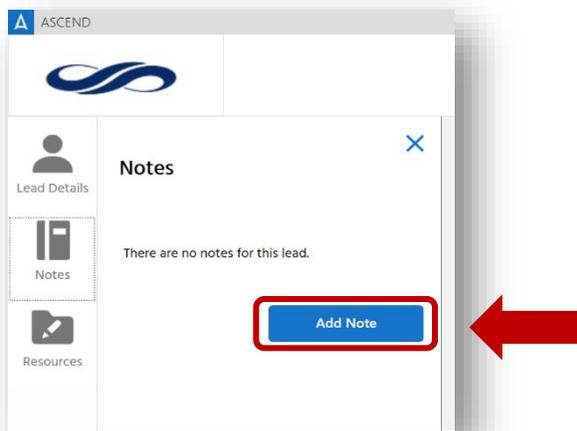
The Confirmation Number is 653.

Adding Notes to your Meeting or Lead

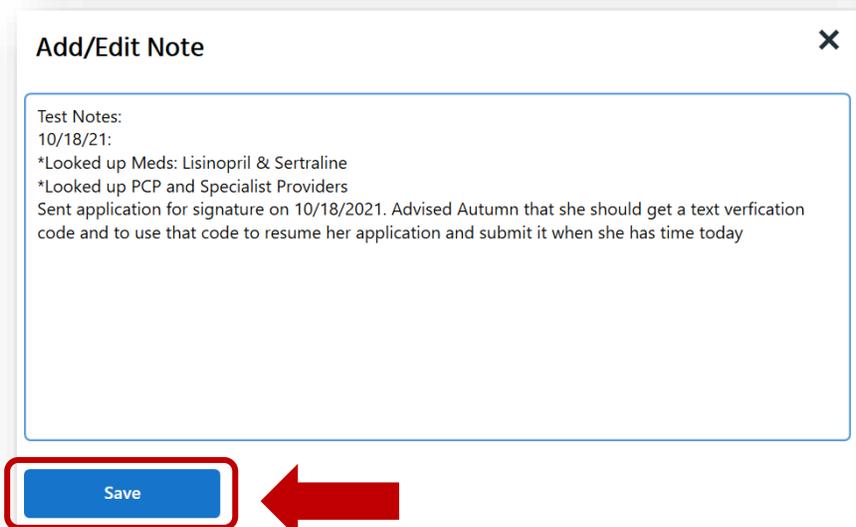
111. If you would like to add notes from your meeting, click on the “Notes” button on the left hand side before ending the meeting



112. Next, click on the “Add Note” button



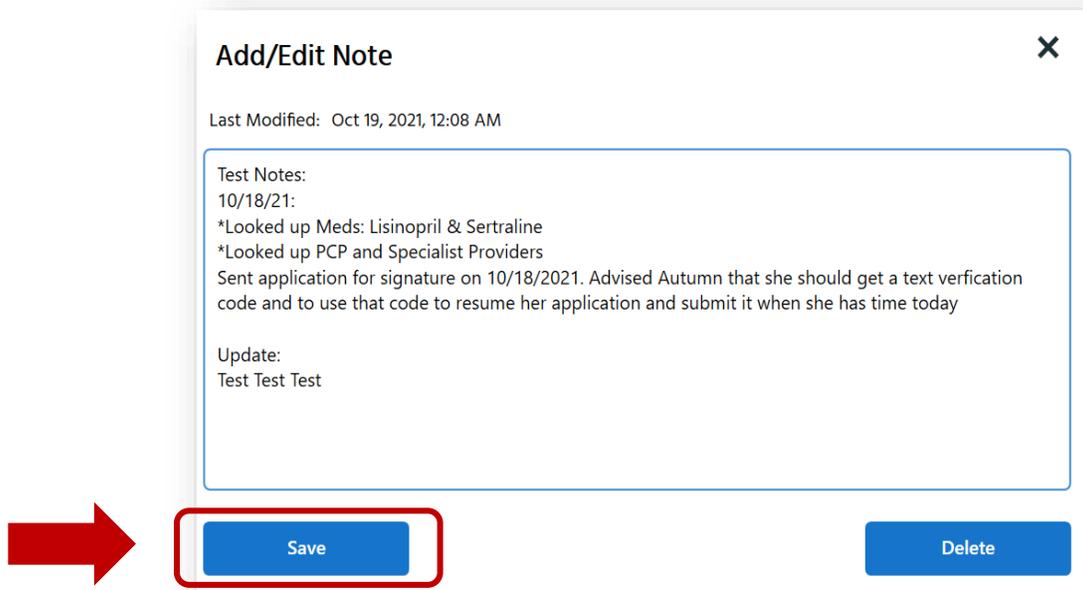
113. Add the notes you want for your meeting and then click the “Save” button



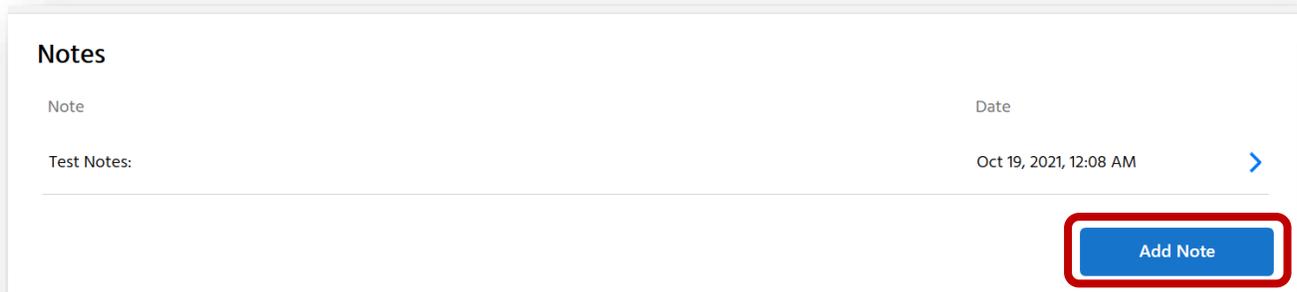
114. If you go back into your Lead, scroll down to the “Notes” Section you will see the notes you entered. If you click on the “>” button you can edit your notes.



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

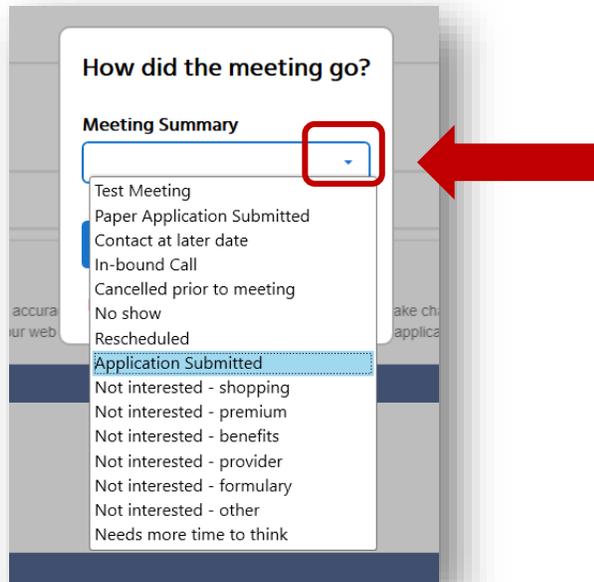


Dispositioning the Meeting

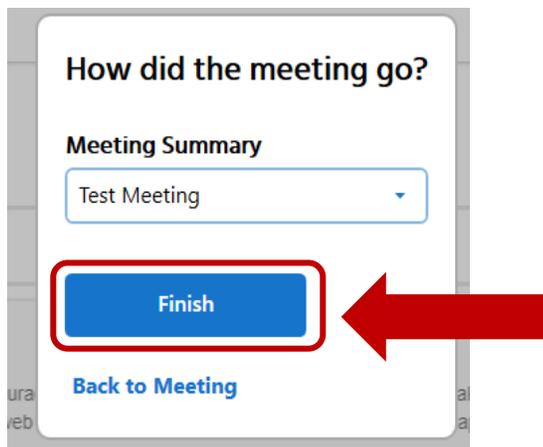
117. Once the meeting is completed, click on the “End Meeting” Button



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

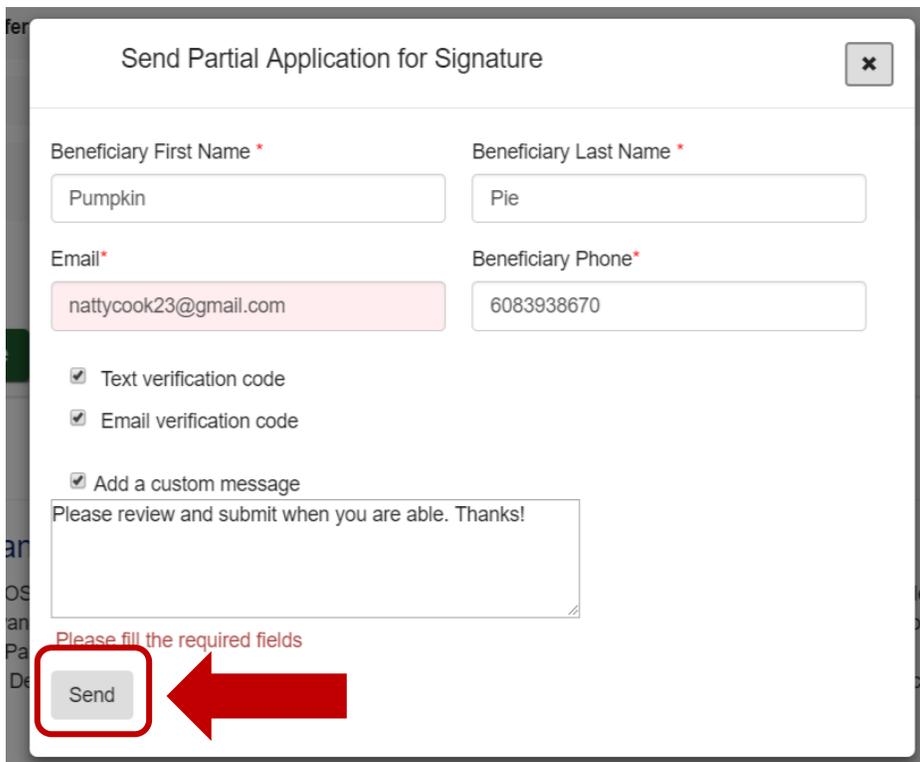
This feature will allow you to send a partial application to your client for them to resume and submit applications on your behalf. This feature is great to use to during COVID-19 if you have already discussed products over the phone and they just need to sign the application

120. Click on the “Send for Signature” button



A screenshot of a web application interface. At the top right, it says "Not Recording: 00:11:15" and "End Meeting". Below this are navigation icons: a left arrow, a right arrow, a close 'X' icon, and a refresh icon, followed by a "Change URL" link. The form contains several input fields: "Zip" with the value "53913", "County" with the value "Sauk", and a checkbox for "Mailing Address (Only if different than Permanent Residence Address)". Below these is a section for "* Required Information" with "Back" and "Next" buttons. At the bottom left, there are two buttons: "Save" and "Send for Signature". The "Send for Signature" button is highlighted with a red box and a red arrow points to it from the right.

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

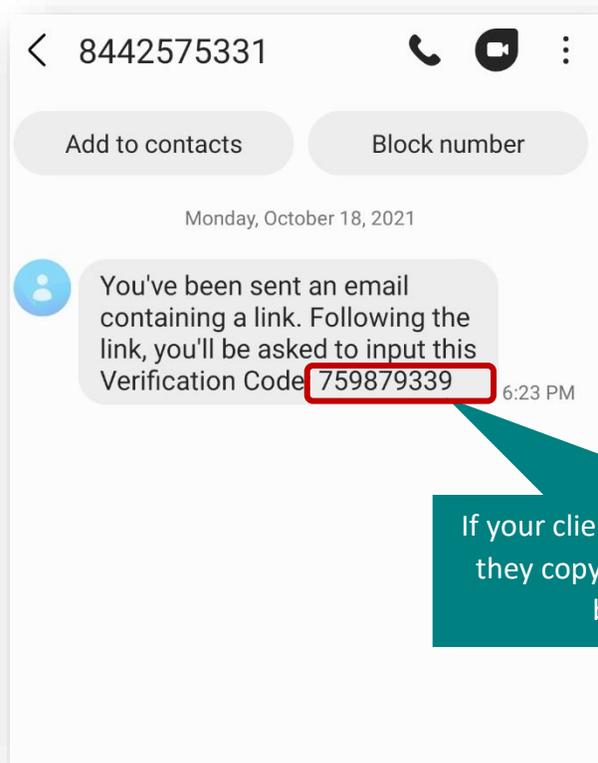


A screenshot of a dialog box titled "Send Partial Application for Signature". It contains several input fields: "Beneficiary First Name" with the value "Pumpkin", "Beneficiary Last Name" with the value "Pie", "Email" with the value "nattycook23@gmail.com", and "Beneficiary Phone" with the value "6083938670". Below these are three checkboxes: "Text verification code", "Email verification code", and "Add a custom message". The "Add a custom message" checkbox is checked, and a text area below it contains the message "Please review and submit when you are able. Thanks!". At the bottom left, there is a "Send" button. A red box highlights the "Send" button, and a red arrow points to it from the right. A red error message "Please fill the required fields" is visible above the "Send" button.

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

The screenshot shows a web form titled "Send Partial Application for Signature". It contains several input fields: "Beneficiary First Name" (Pumpkin), "Beneficiary Last Name" (Pie), "Email" (nattycook23@gmail.com), and "Beneficiary Phone" (6083938670). There are three checked checkboxes: "Text verification code", "Email verification code", and "Add a custom message". A text area contains the message "Please review and submit when you are able. Thanks!". A green notification box with a red border is overlaid on the form, stating: "Email sent. The verification code is 759879339. The code was sent to the beneficiary's phone." At the bottom, there are "Send" and "Home" buttons.

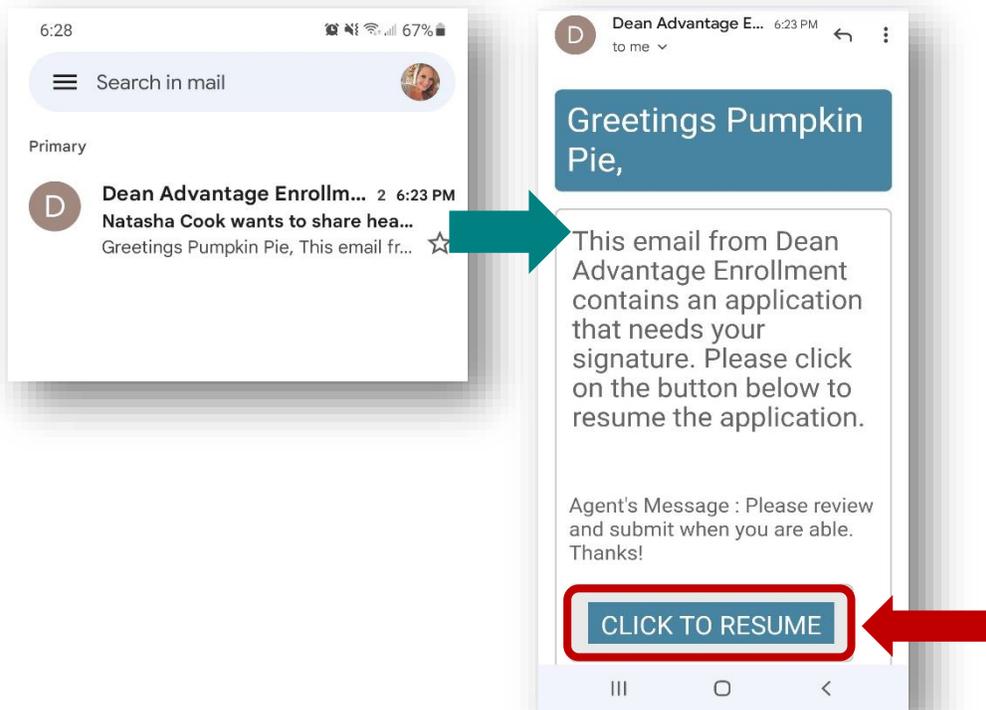
123. Below is what the text message looks like



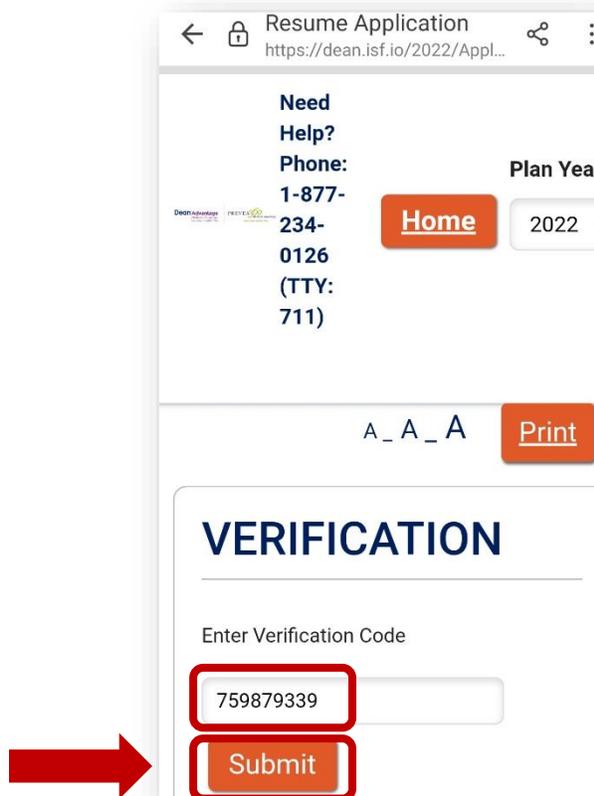
If your client is using a Smart Device, it's easy if they copy the verification code from the text before going to their email

124. Your client will then want to go to their email and click on the enrollment email

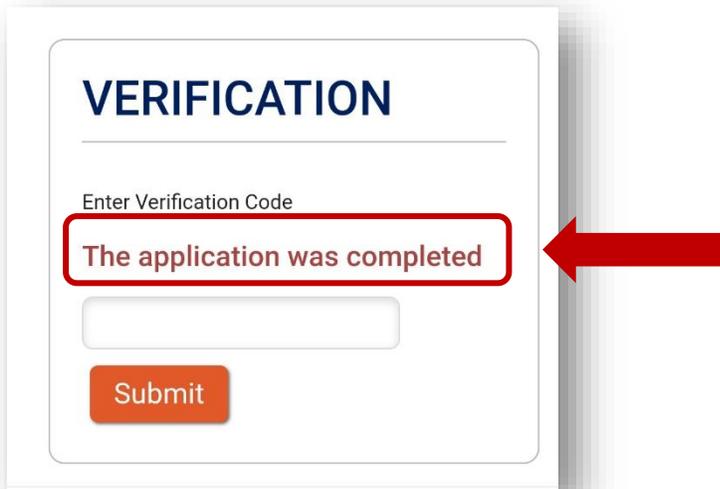
125. They will then click on the “CLICK TO RESUME” button



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



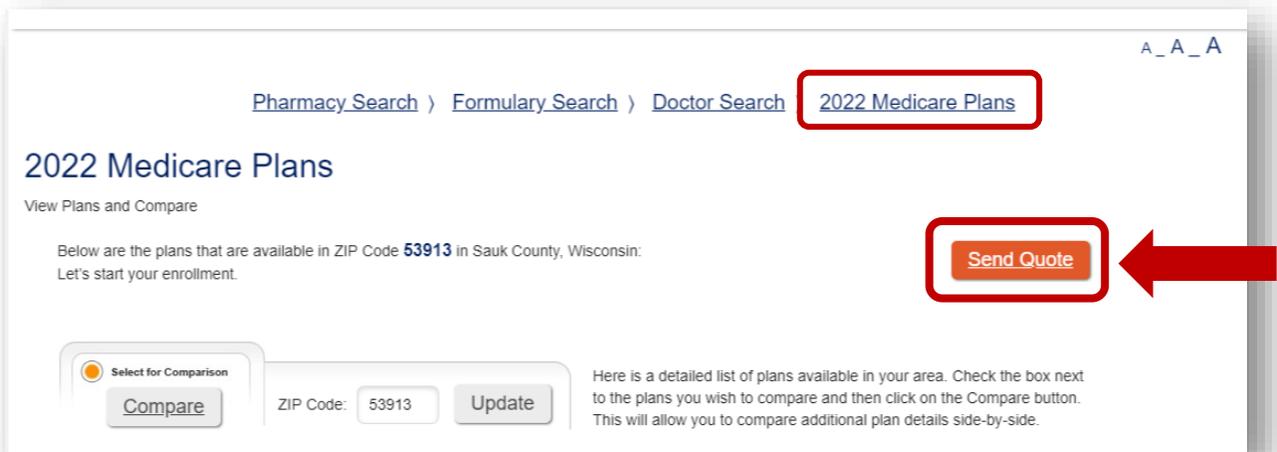
127. If your client has submitted the application and tries to enter the verification code again, they will get this error message:



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

Send Quote ✕

Beneficiary First Name *

Beneficiary Last Name *

Email Addresses (maximum of two)*

Beneficiary Phone*

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

- Application Only - Select 1 Plan
- Text Verification Code - Select 1+ Plans
- Email Verification Code - Select 1+ Plans
- Email Agent

^ Dean Advantage Enrollment Medicare Advantage 2 selected

Select All [Clear All](#)

- Dean Advantage Essential (HMO) - H9096
- Dean Advantage Assurance (HMO-POS) - H9096
- Dean Advantage Balance (HMO-POS) - H9096
- Dean Advantage Harmony (HMO-POS MA-Only) - H9096
- Dean Advantage Complete (HMO) - H9096

Add a custom message

Check out these two plans that I think you will really like :)

Email sent. The verification code is 1888655326. The code was sent to the beneficiary's phone.

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

Natasha Cook wants to share health insurance opti...

Dean Advanta
To: Cook, Natasha
9:55 AM

Retention Policy Personal Folder Expires 4/12/2023

If there are problems with how this message is displayed, click here to view it in a web browser. We could not verify the identity of the sender. Click here to learn more.

CAUTION: This email originated from outside of the SSM Health organization. Do not click links or open attachments unless you recognize the sender and know the content is safe. Questions? Contact the TSC at 314-644-7345 or your local Help Desk.

You've been sent an email containing a link. Following the link, you'll be asked to input this Verification Code: **1888655326**

Natasha Cook wants to share health insurance opti...

Dean Advantage Enrollment <dono>
To: Cook, Natasha
Cc: nattycook23@gmail.com
9:55 AM

Retention Policy Personal Folders (1 year, 5 mo) Expires 4/12/2023

If there are problems with how this message is displayed, click here to view it in a web browser. We could not verify the identity of the sender. Click here to learn more. Click here to download pictures. To help protect your privacy, Outlook prevented automatic download of some pictures in this message.

CAUTION: This email originated from outside of the SSM Health organization. Do not click links or open attachments unless you recognize the sender and know the content is safe. Questions? Contact the TSC at 314-644-7345 or your local Help Desk.

Greetings Natasha Cook,

Thank you for your interest in our healthcare plan(s). Below you will find your quote as well as quick access to additional information about the plan. If you are ready, you may enroll in the plan now.

Agent's Message : Check out these two plans that I think you will really like :)

CLICK TO VIEW

Natasha Cook

Dean Advantage Enrollment

Call: [6083938670](tel:6083938670)

nattycook23@gmail.com

You received this email upon request.

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

Dean Advantage
Medicare Coverage
by Dean Health Plan

PREVEA 360
Medicare Advantage
with Dean Health Plan

Need Help?
Phone: 1-877-234-0126 (TTY: 711)

VERIFICATION

Enter Verification Code

1888655326

Submit

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

This site was accessed using a link from an email. All enrollments made will be credited to Natasha Cook

Dean Advantage
Medicare Coverage
by Dean Health Plan

PREVEA360
Medicare Advantage
from Dean Health Plan

Need Help?
Phone: 1-877-234-0126 (TTY: 711)
Hours: 8 am to 8 pm (CT)
Weekdays (year-round)
Weekends from October 1 – March 31
Except certain holidays

Home 2022

A_A_A Print

[Pharmacy Search](#) > [Formulary Search](#) > [Doctor Search](#) > [2022 Medicare Plans](#)

2022 Medicare Plans

View Plans and Compare

Below are the plans that are available in ZIP Code **53913** in Sauk County, Wisconsin:
Let's start your enrollment.

Select for Comparison Compare ZIP Code: 53913 Update

Here is a detailed list of plans available in your area. Check the box next to the plans you wish to compare and then click on the Compare button. This will allow you to compare additional plan details side-by-side.

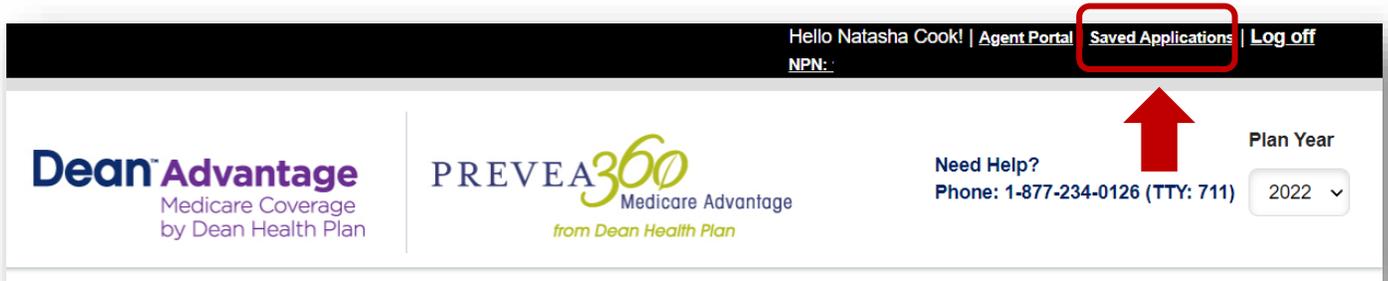
Medicare Advantage

Select for Comparison	Plan Name	Annual Premium	Max Enrollee Out-of-Pocket	In-Network Copay	Includes	Monthly Cost
<input type="checkbox"/>	Assurance (HMO-POS) SSM Presence (HMO-POS)	\$480	\$4,500 In-Network and Out-of-Network Combined	Primary Care: \$0 Specialist Office Visit: \$40 Emergency Care: \$90	Out-of-Network Coverage: Yes In-Home Support Yes Rx: Yes Comprehensive Dental: Yes OTC: Yes Part B Premium Reduction: No	\$40.00 per month Apply Now
<input type="checkbox"/>	Balance (HMO-POS)	\$984	\$3,500 In-Network and Out-of-Network Combined	Primary Care: \$0 Specialist Office Visit: \$25 Emergency Care: \$90	Out-of-Network Coverage: Yes In-Home Support Yes Rx: Yes Comprehensive Dental: Yes OTC: Yes Part B Premium Reduction: No	\$82.00 per month Apply Now

Only the Assurance & Balance were sent to the client

Saved Applications

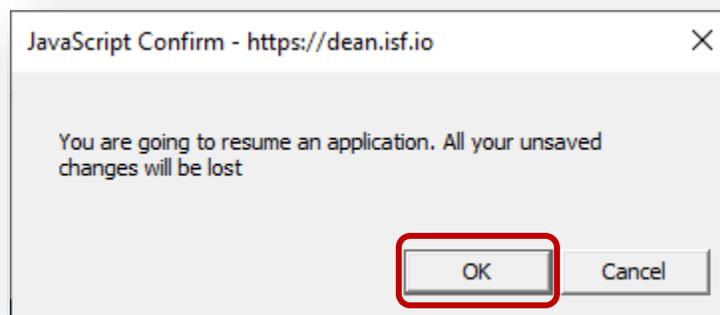
133. At any point you can save an application and come back to it later. All “Saved” and “Send for Signature” applications will be located in your “**Saved Applications**” side of the Agent Portal
134. Until your client has submitted the application, the application will sit in your saved applications
 - 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



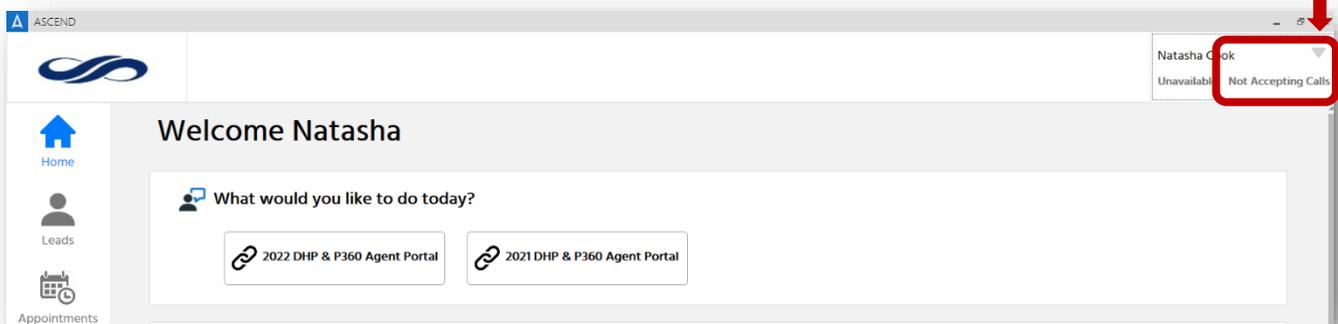
RATE (Remote Agent Telephonic Enrollment)

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:

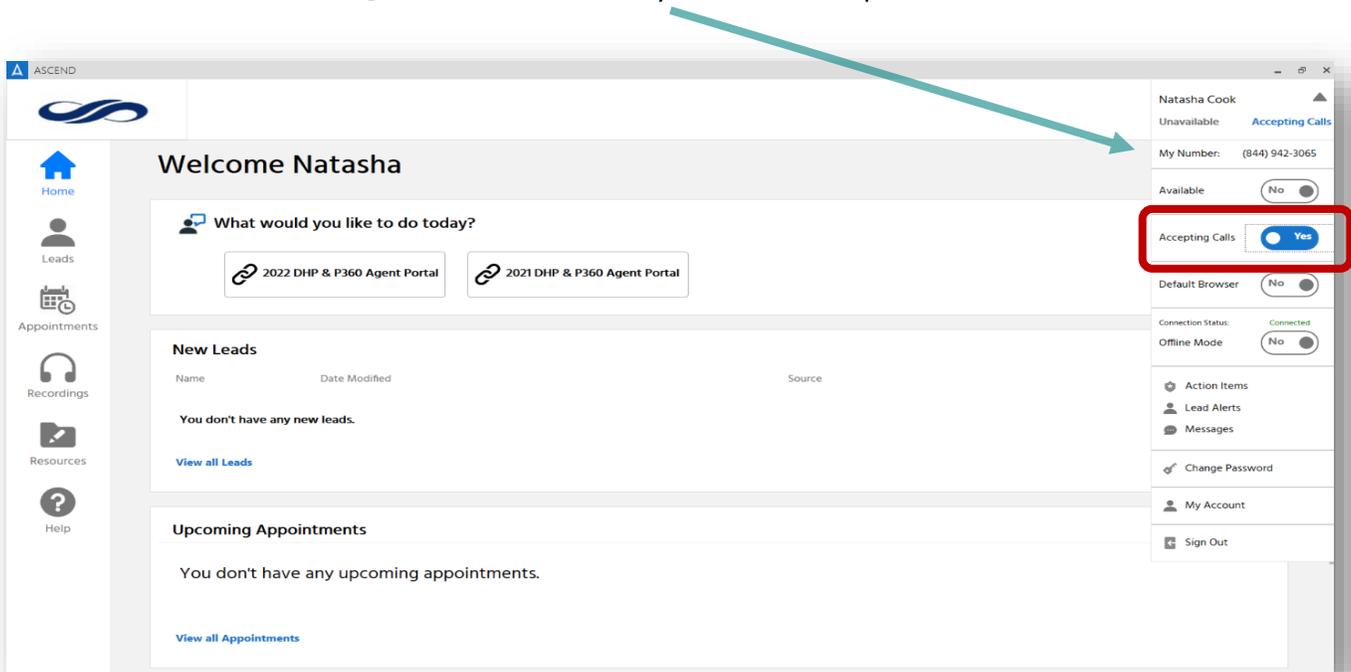
- To be compliant with CMS, these enrollments **must occur through AMA**
- Each agent will be given a unique RATE phone number to share with their prospects
- The phone call can only be answered through AMA
- You must be logged into AMA to receive a RATE call
- You need to know when a prospect will be 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

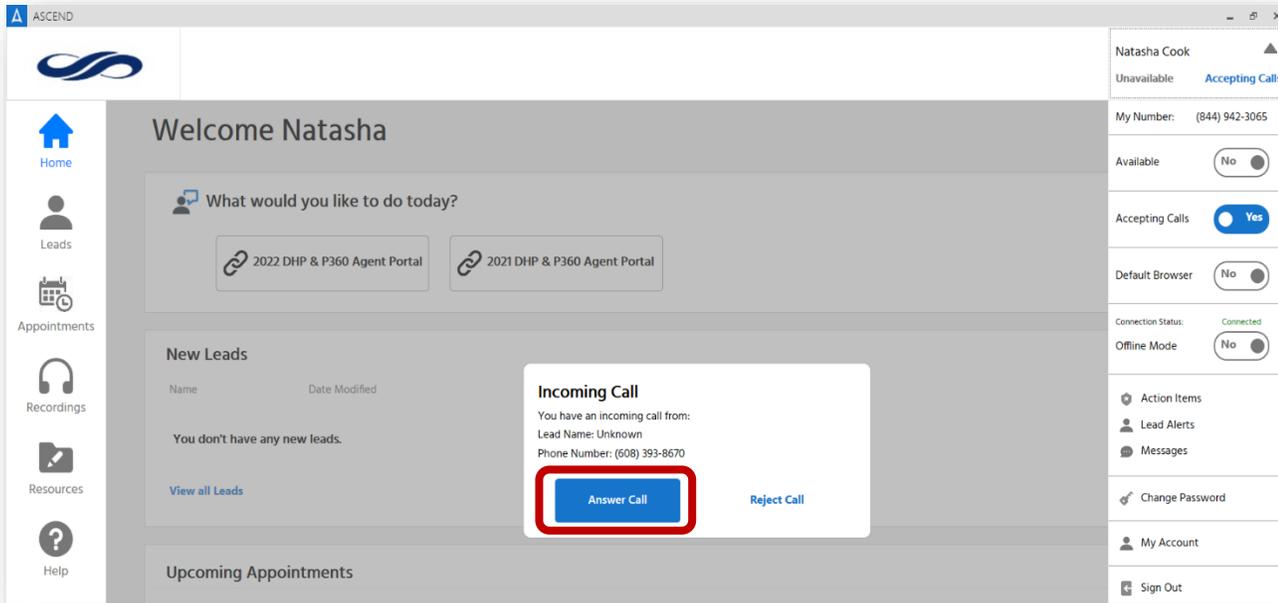


139. Toggle from **“Accepting Calls”** from **“No”** to **“Yes”**

- 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

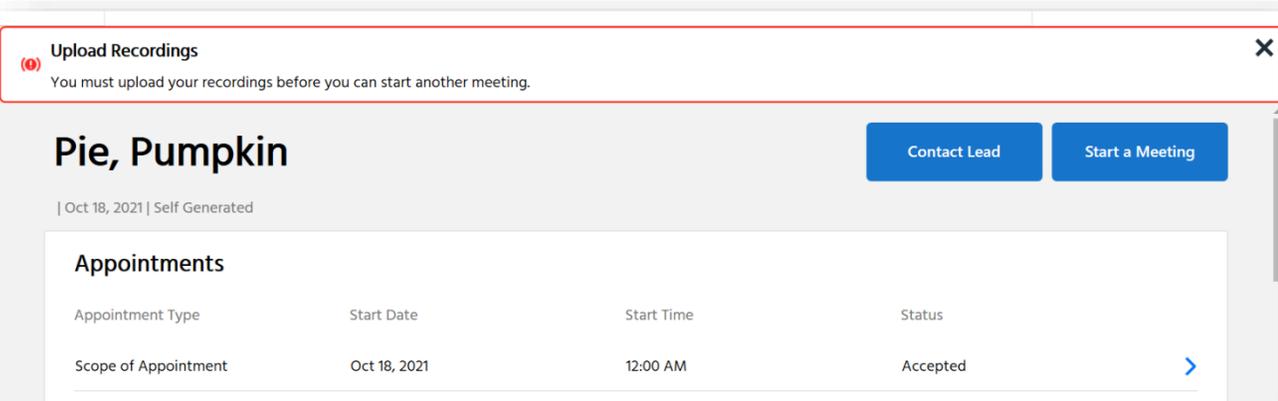


141. Other information on RATE

- 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

The screenshot shows the 'Recordings' page in the ASCEND system. The user is logged in as Natasha Cook. The page displays a table of recordings:

Lead	Creation Date	Upload
Autumn Leaves	Oct 18, 2021	Upload
Autumn Leaves	Oct 18, 2021	Upload
Autumn Leaves	Oct 18, 2021	Upload

A red box highlights the 'Upload All Recordings' button in the top right corner. A red box also highlights the 'Recordings' icon in the left sidebar. A red arrow points to the 'Upload All Recordings' button.

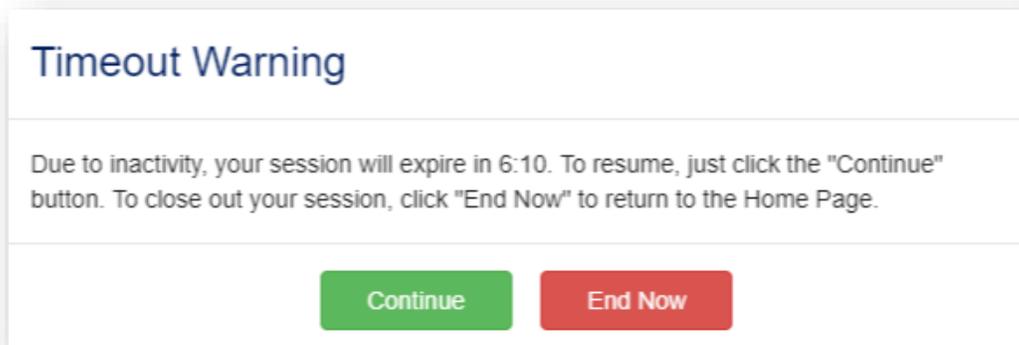
Signing Out

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

The screenshot shows the user profile dropdown menu in the ASCEND system. The user is logged in as Natasha Cook. The menu is open, showing options like 'Available', 'Accepting Calls', 'Default Browser', 'Connection Status', 'Offline Mode', 'Action Items', 'Lead Alerts', 'Messages', 'Change Password', 'My Account', and 'Sign Out'. A red box highlights the 'Sign Out' button at the bottom. A red box also highlights the dropdown arrow icon at the top right. A red arrow points to the dropdown arrow icon.

Timeout Session Warning

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



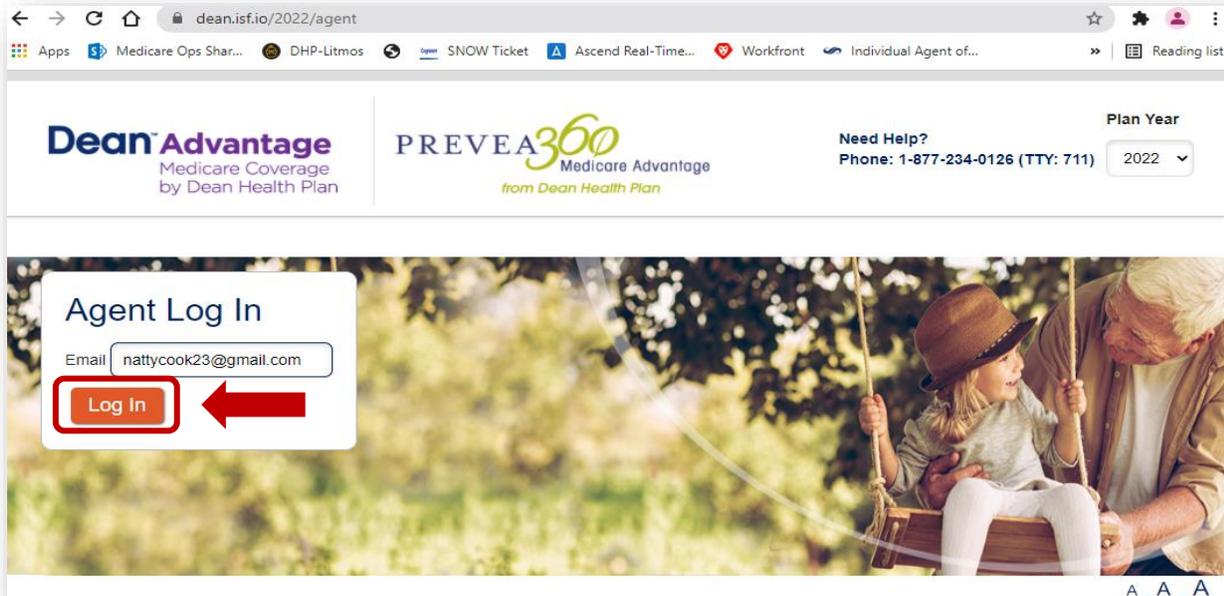
AQE: Ascend Agent Portal

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)

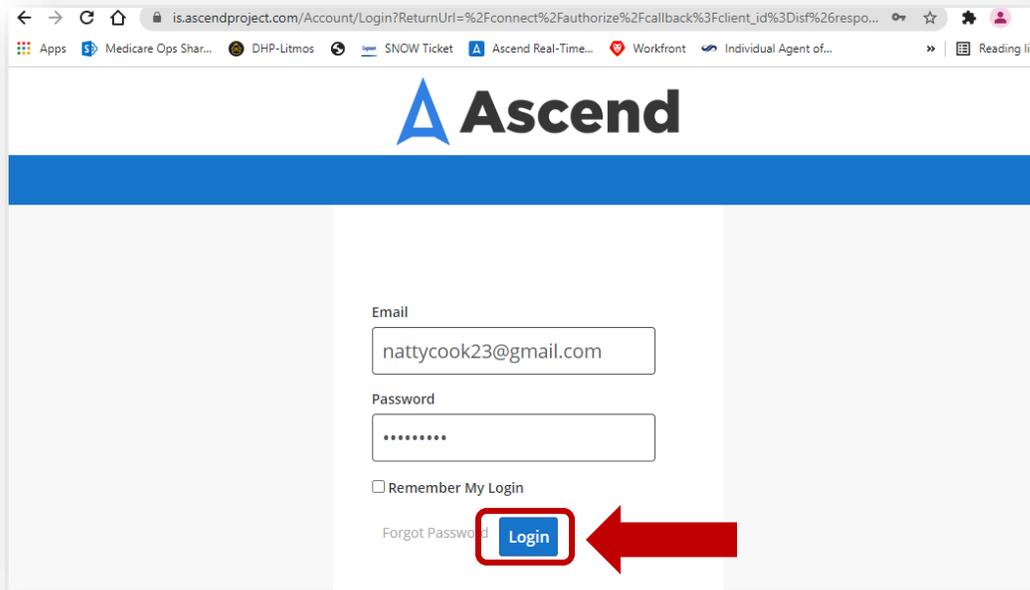
Logging into Ascend Agent Portal

146. URL link is <https://dean.isf.io/2022/agent>

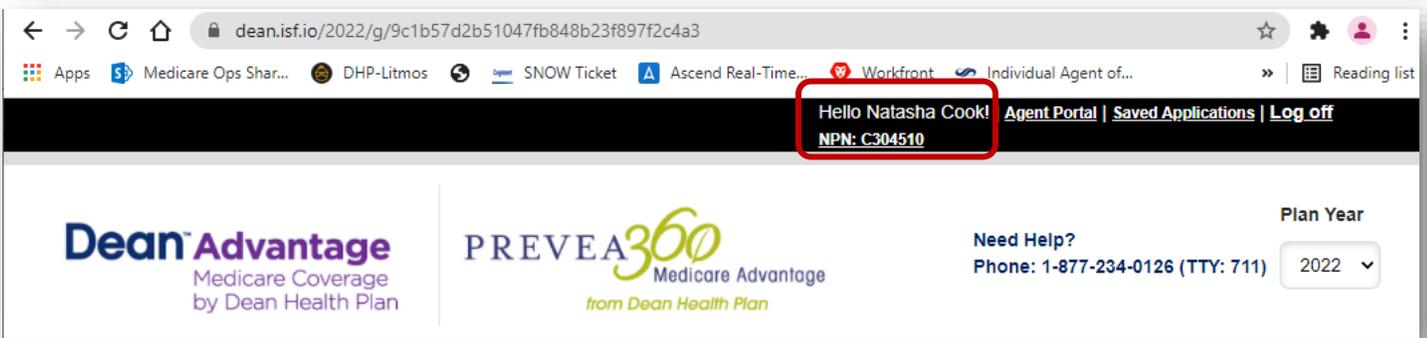
147. Enter your email and click the "Log In" button



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

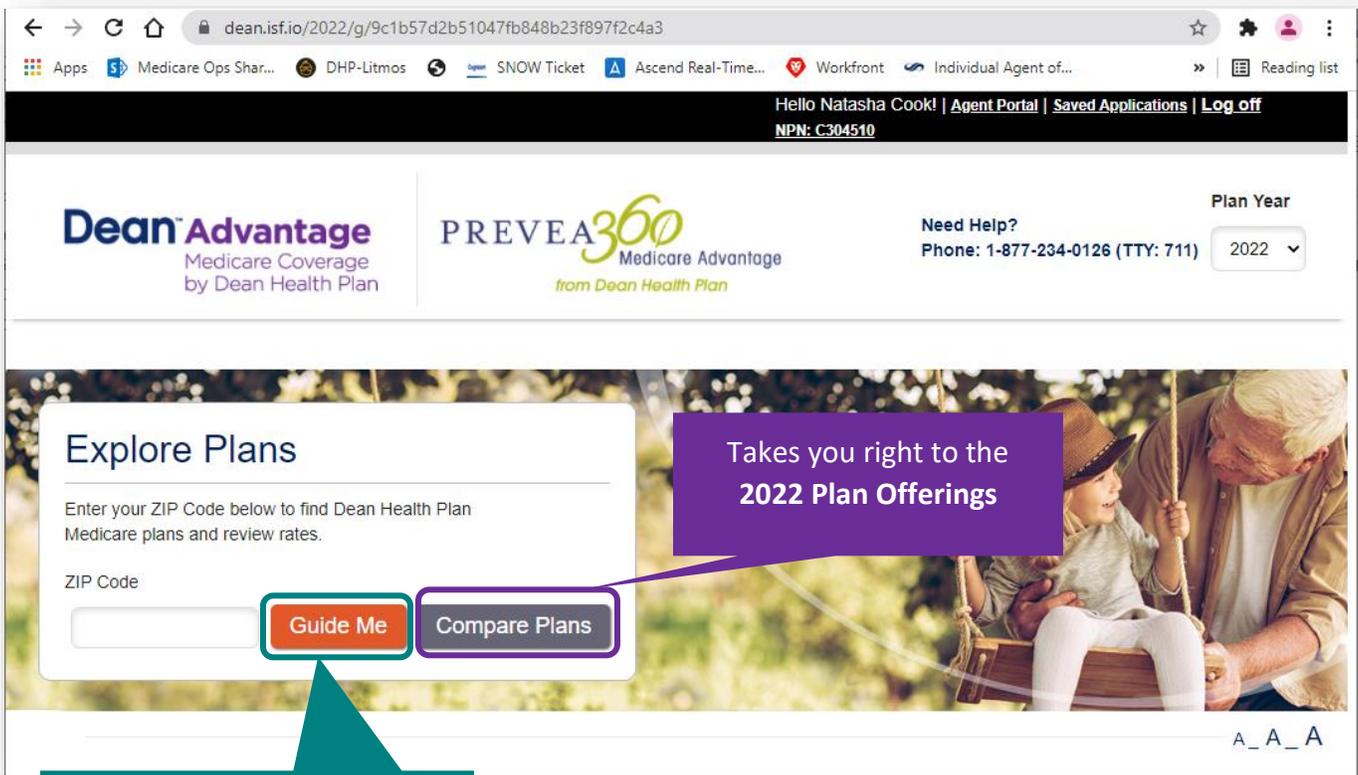


149. Make sure when you login it says “Hello [Your Name]!” in the top right hand corner
- You will notice that your “NPN” will show up as a “C” number, that is your internal Medicare Advantage writing number with us
 - Its best to clear your cookies and cache before logging in



AQE: Quoting & Enrolling

150. The site will start you at the Explore Plans/Quoting Page- See the “[Quoting and Enrolling](#)” Section for more information
- The “**Guide Me**” button will take you to the Assisted Shopping Tools- See the “[Assisted Shopping Tools](#)” for more information
 - 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

2022 Medicare Plans

View Plans and Compare

Below are the plans that are available in ZIP Code 53717 in Dane County, Wisconsin. Let's start your enrollment. [Send Quote](#)

Select for Comparison: Compare ZIP Code: 53717 Here is a detailed list of plans available in your area. Check the box next to the plans you wish to compare and then click on the Compare button. This will allow you to compare additional plan details side-by-side.

Medicare Advantage				
<input type="checkbox"/> Select for Comparison	Dean Advantage Essential (HMO) Senior Savings Plan			<input type="checkbox"/>
<input type="checkbox"/>	<p>Essential (HMO)</p> <p>Annual Premium: \$0.00</p> <p>Max Enrollee Out-of-Pocket: \$6,500</p> <p>In-Network Copay: Primary Care: \$0, Specialist Office Visit: \$50, Emergency Care: \$90</p> <p>Includes: Out-of-Network Coverage: No, In-Home Support: Yes, Rx: Yes, Comprehensive Dental: Yes, OTC: Yes, Part B Premium Reduction: No</p> <p>\$0.00 per month</p> <p>Apply Now</p>			
<input type="checkbox"/>	Dean Advantage Assurance (HMO-POS) Senior Savings Plan			<input type="checkbox"/>
<input type="checkbox"/>	<p>Assurance (HMO-POS) SSM Presence (HMO-POS)</p> <p>Annual Premium: \$480</p> <p>Max Enrollee Out-of-Pocket: \$4,500 In-Network and Out-of-Network Combined</p> <p>In-Network Copay: Primary Care: \$0, Specialist Office Visit: \$40, Emergency Care: \$90</p> <p>Includes: Out-of-Network Coverage: Yes, In-Home Support: Yes, Rx: Yes, Comprehensive Dental: Yes, OTC: Yes, Part B Premium Reduction: No</p> <p>\$40.00 per month</p> <p>Apply Now</p>			

Zip Code: 54229 P360 Advantage

2022 Medicare Plans

View Plans and Compare

Below are the plans that are available in ZIP Code 54229 in Brown County, Wisconsin. Let's start your enrollment. [Send Quote](#)

Select for Comparison: Compare ZIP Code: 54229 Here is a detailed list of plans available in your area. Check the box next to the plans you wish to compare and then click on the Compare button. This will allow you to compare additional plan details side-by-side.

Medicare Advantage				
<input type="checkbox"/> Select for Comparison	Prevea360 Medicare Advantage Essential (HMO-POS) Senior Savings Plan			<input type="checkbox"/>
<input type="checkbox"/>	<p>Essential (HMO-POS)</p> <p>Annual Premium: \$0.00</p> <p>Max Enrollee Out-of-Pocket: \$4,500 In-Network and \$6,000 In-Network and Out-of-Network Combined</p> <p>In-Network Copay: Primary Care: \$0, Specialist Office Visit: \$35, Emergency Care: \$90</p> <p>Includes: Out-of-Network Coverage: Yes, In-Home Support: Yes, Rx: Yes, Comprehensive Dental: Yes, OTC: Yes, Part B Premium Reduction: \$25</p> <p>\$0.00 per month</p> <p>Apply Now</p>			
<input type="checkbox"/>	Prevea360 Medicare Advantage Harmony (HMO-POS MA-Only)			<input type="checkbox"/>
<input type="checkbox"/>	<p>Harmony (HMO-POS MA-Only)</p> <p>Annual Premium: \$0.00</p> <p>Max Enrollee Out-of-Pocket: \$4,500 In-Network and \$6,000 In-Network and Out-of-Network Combined</p> <p>In-Network Copay: Primary Care: \$0, Specialist Office Visit: \$35, Emergency Care: \$90</p> <p>Includes: Out-of-Network Coverage: Yes, In-Home Support: Yes, Rx: No, Comprehensive Dental: Yes, OTC: Yes, Part B Premium Reduction: \$50</p> <p>\$0.00 per month</p> <p>Apply Now</p>			

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 paid
 - iii. **Recouped:** The commission has been recouped
 - iv. **AOR Change:** Application has been superseded by a new application from a different agent

Name	Address	Plan	Plan Year	Date	Premium	Confirmation #	Status	Commission Status
Test Tester	1277 Deming Way, Madison, Dane, WI, 53717	Dean Advantage Essential (HMO)	2022	10/18/2021	\$0.00	653	Pending	
Wicked Stepmother	475 Chippewa Mall Drive, Chippewa Falls, WI, 54729	Prevea360 Medicare Advantage Harmony (HMO-POS MA-Only)	2022	09/29/2021	\$0.00	650	Pending	
Evil Queen	3730 Gateway Drive, Eau Claire, WI, 54701	Prevea360 Medicare Advantage Essential (HMO-POS)	2022	09/29/2021	\$0.00	649	Pending	

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)

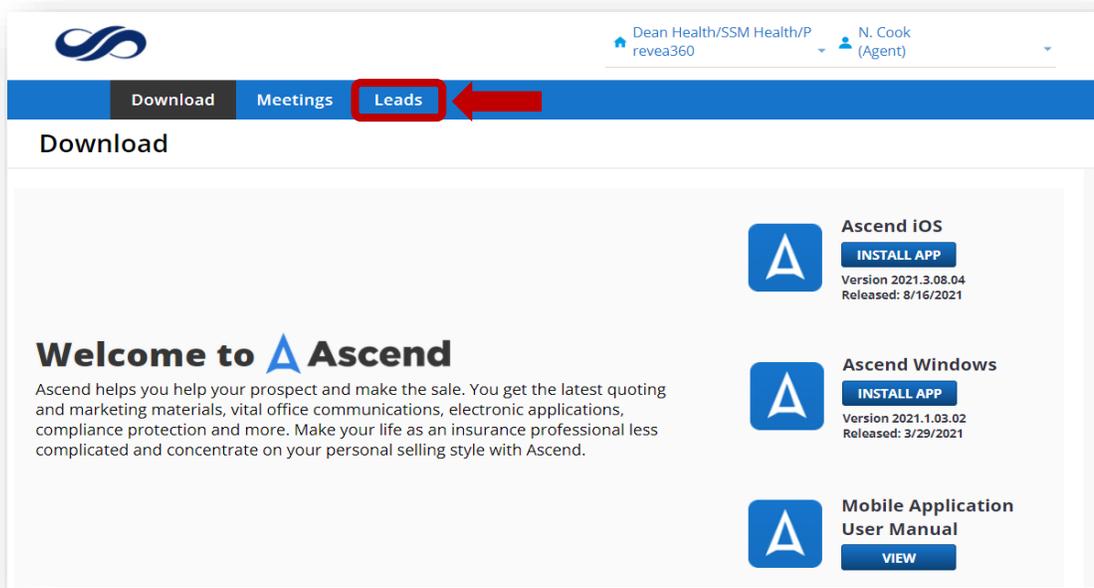
Functions of ARM

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

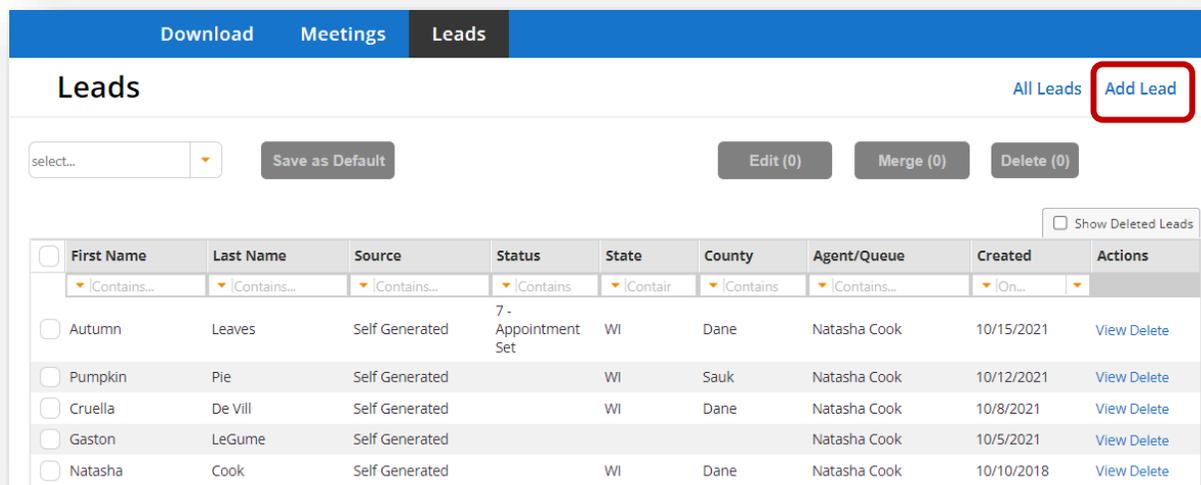
Managing/Adding Leads via ARM

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 won't 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 your leads
 - ii. These are your leads, no other agent will have access to your leads

Lead Information

Please note:
Fields followed by (*) are required.

 **Save** Cancel

First Name: * Jack Last Name: * O'Lantern

Address

Address: 2710 Executive Dr
City: Green Bay County: Brown
State: Wisconsin Zip Code: 54304

Miscellaneous Info

Phone Number: * 608-393-8670 Email: spookypumpkin31@gmail.com
Gender: male Date of Birth: 10/31/1956
Lead Source: - Select Source - External ID:
Lead Status: - Select Status - Assigned Agent/Queue: **Natasha Cook (nattycook23@gmail.co**

Permission to Contact Contact Via Email Contact Via Phone Contact Via Mail Do Not Contact

Alternate Phone Numbers

Phone Type:	Phone Number:	Is Active
Primary		<input checked="" type="checkbox"/>

[Add additional phone number](#)

Medicare Information

Claim Number: QW56CV23HJ78 Part A Effective Date: 10/01/2021 Part B Effective Date: 10/01/2021

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

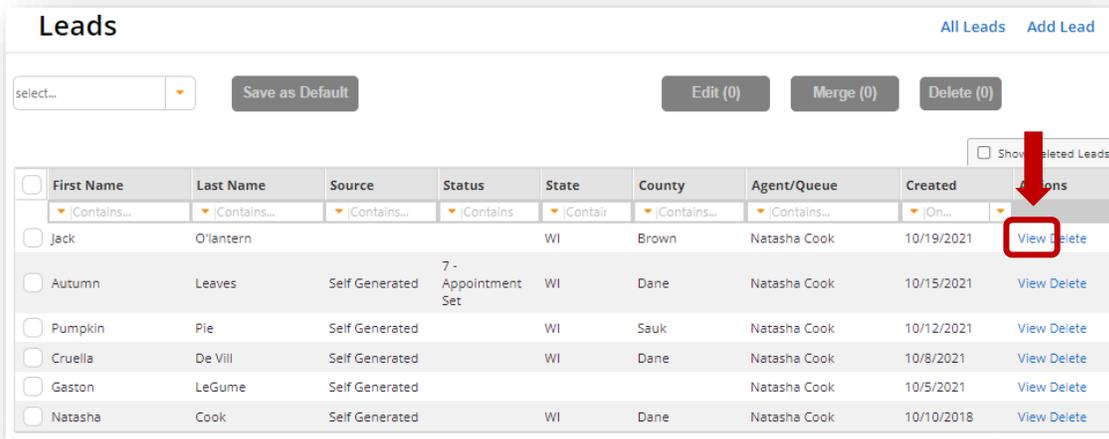
Leads

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

Lead was added successfully.

Editing Leads via ARM

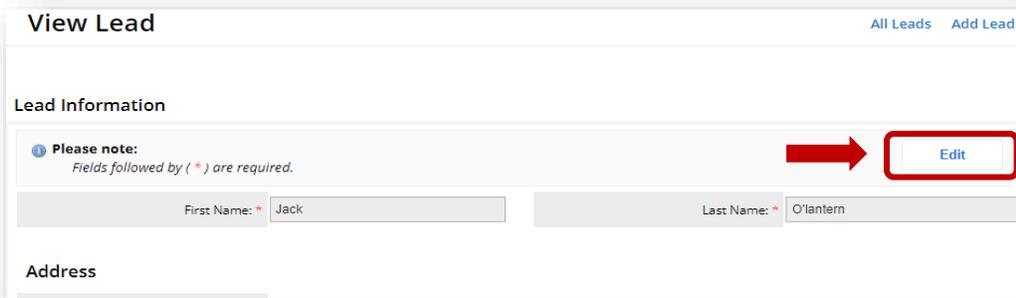
159. Go back to your Leads and click on the “View” button on the Lead you want to edit



The screenshot shows a table titled "Leads" with columns: First Name, Last Name, Source, Status, State, County, Agent/Queue, Created, and Actions. A red box highlights the "View" button in the Actions column for the first lead, Jack O'lantern. A red arrow points to this button.

	First Name	Last Name	Source	Status	State	County	Agent/Queue	Created	Actions
<input type="checkbox"/>	Jack	O'lantern			WI	Brown	Natasha Cook	10/19/2021	View Delete
<input type="checkbox"/>	Autumn	Leaves	Self Generated	7 - Appointment Set	WI	Dane	Natasha Cook	10/15/2021	View Delete
<input type="checkbox"/>	Pumpkin	Pie	Self Generated		WI	Sauk	Natasha Cook	10/12/2021	View Delete
<input type="checkbox"/>	Cruella	De Vill	Self Generated		WI	Dane	Natasha Cook	10/8/2021	View Delete
<input type="checkbox"/>	Gaston	LeGume	Self Generated				Natasha Cook	10/5/2021	View Delete
<input type="checkbox"/>	Natasha	Cook	Self Generated		WI	Dane	Natasha Cook	10/10/2018	View Delete

160. Click on the “Edit” button



The screenshot shows the "View Lead" form. A red box highlights the "Edit" button. A red arrow points to this button.

View Lead All Leads Add Lead

Lead Information

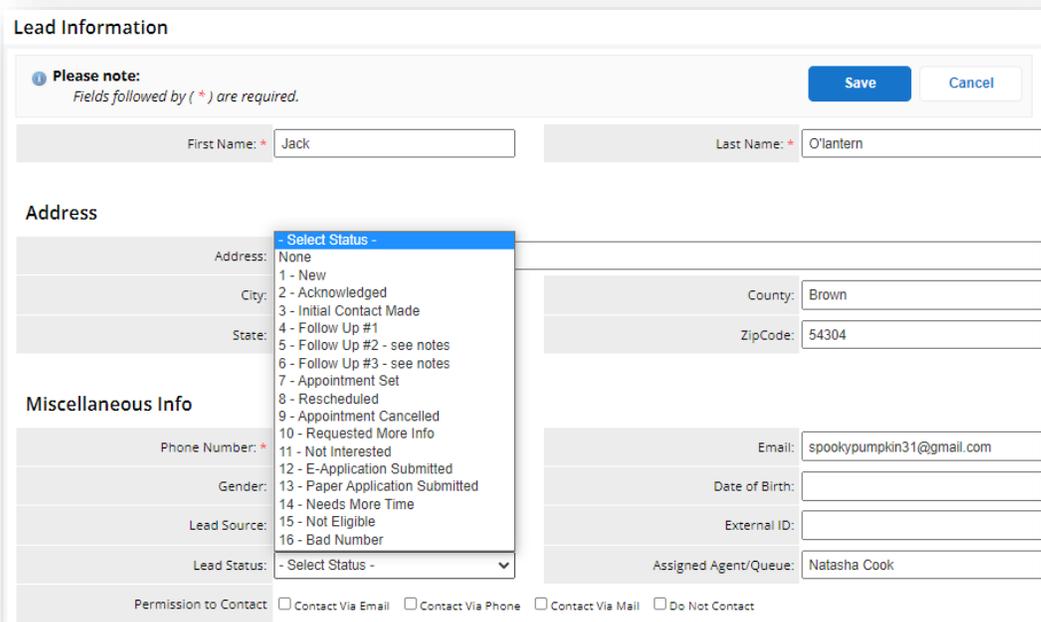
Please note:
Fields followed by (*) are required.

First Name: * Jack Last Name: * O'lantern

Address

[Edit](#)

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



The screenshot shows the "Lead Information" form with a dropdown menu open for the "Lead Status" field. The dropdown menu lists various status options from 1 to 16. The "Save" button is highlighted.

Lead Information

Please note:
Fields followed by (*) are required.

Save Cancel

First Name: * Jack Last Name: * O'lantern

Address

Address:

City:

State:

County: Brown

ZipCode: 54304

Miscellaneous Info

Phone Number: *

Gender:

Lead Source:

Lead Status: - Select Status -

Assigned Agent/Queue: Natasha Cook

Permission to Contact Contact Via Email Contact Via Phone Contact Via Mail Do Not Contact

- Select Status -
- None
- 1 - New
- 2 - Acknowledged
- 3 - Initial Contact Made
- 4 - Follow Up #1
- 5 - Follow Up #2 - see notes
- 6 - Follow Up #3 - see notes
- 7 - Appointment Set
- 8 - Rescheduled
- 9 - Appointment Cancelled
- 10 - Requested More Info
- 11 - Not Interested
- 12 - E-Application Submitted
- 13 - Paper Application Submitted
- 14 - Needs More Time
- 15 - Not Eligible
- 16 - Bad Number

Adding Notes via ARM

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

Alternate Phone Numbers

Phone Type:	Phone Number:	Is Active
Primary		<input checked="" type="checkbox"/>

[Add additional phone number](#)

Medicare Information

Claim Number:	HA89DF23NM89	Part A Effective Date:	10/01/2021	Part B Effective Date:	10/01/2021
---------------	--------------	------------------------	------------	------------------------	------------

Notes Show Deleted Notes

Date Modified	Created By	Text
10/19/2021 11:20 PM	Natasha Cook	Lead was assigned to Natasha Cook.

1 - 1 of 1 records

Prev 1 Next

163. Add your notes and click on the “Done” button

Note

Text

10/19: Test Test Test

Done Cancel

164. You will see your note in the notes section

Notes Show Deleted Notes

Date Modified	Created By	Text
10/20/2021 12:03 AM	Natasha Cook	10/19: Test Test Test
10/19/2021 11:20 PM	Natasha Cook	Lead was assigned to Natasha Cook.

1 - 2 of 2 records

Prev 1 Next

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

Edit Lead All Leads Add Lead

Lead Information

Please note:
Fields followed by (*) are required.

First Name: * Jack Last Name: * O'lantern

Address

Address: 2710 Executive Dr
City: Green Bay County: Brown
State: Wisconsin ZipCode: 54304

Deleting Leads

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

Leads All Leads Add Lead

select... Save as Default Edit (0) Merge (0) Delete (0)

Show Deleted Leads

<input type="checkbox"/>	First Name	Last Name	Source	Status	State	County	Agent/Queue	Created	Actions
<input type="checkbox"/>	Jack	O'lantern			WI	Brown	Natasha Cook	10/19/2021	View Delete
<input type="checkbox"/>	Autumn	Leaves	Self Generated	7 - Appointment Set	WI	Dane	Natasha Cook	10/15/2021	View Delete
<input type="checkbox"/>	Pumpkin	Pie	Self Generated		WI	Sauk	Natasha Cook	10/12/2021	View Delete
<input type="checkbox"/>	Cruella	De Vill	Self Generated		WI	Dane	Natasha Cook	10/8/2021	View Delete
<input type="checkbox"/>	Gaston	LeGume	Self Generated				Natasha Cook	10/5/2021	View Delete
<input type="checkbox"/>	Natasha	Cook	Self Generated		WI	Dane	Natasha Cook	10/10/2018	View Delete

1 - 6 of 6 records

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

arm.ascendproject.com says
Are you sure you want to delete Natasha Cook

OK Cancel

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

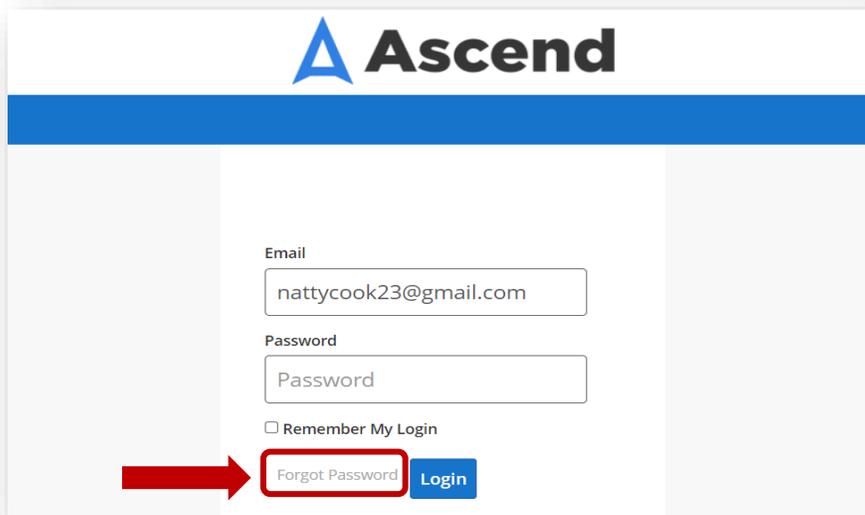
Leads All Leads Add Lead

Lead was successfully deleted.

Password Resets

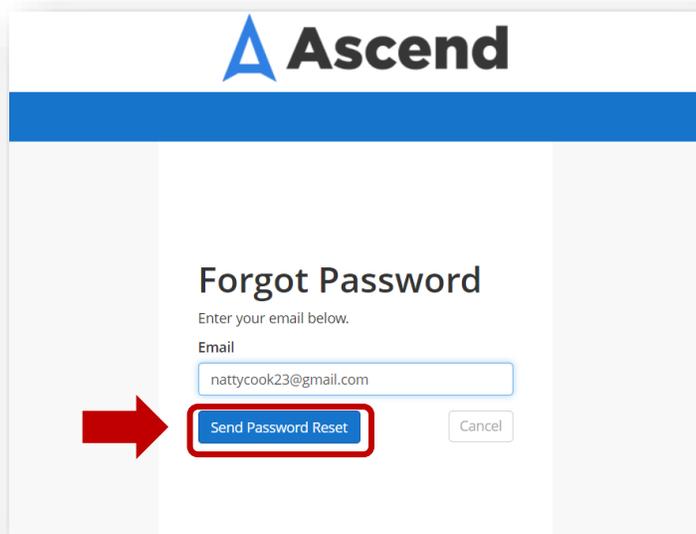
169. If you are unable reset your password from AMA or Ascend, you may need to reset your password from ARM

170. Go to <https://arm.ascendproject.com> and click on “Forgot Password”



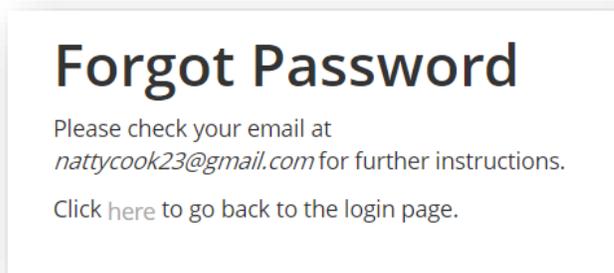
The screenshot shows the Ascend login page. At the top is the Ascend logo. Below it is a blue horizontal bar. The main content area contains a login form with the following elements: an 'Email' field with the text 'nattycook23@gmail.com', a 'Password' field with the text 'Password', a checkbox labeled 'Remember My Login', and two buttons: 'Forgot Password' and 'Login'. A red arrow points to the 'Forgot Password' button, which is also enclosed in a red rectangular box.

171. Type your email address and click on the “Send Password Reset” button



The screenshot shows the 'Forgot Password' page on the Ascend website. At the top is the Ascend logo. Below it is a blue horizontal bar. The main content area contains the heading 'Forgot Password', the instruction 'Enter your email below.', an 'Email' field with the text 'nattycook23@gmail.com', and two buttons: 'Send Password Reset' and 'Cancel'. A red arrow points to the 'Send Password Reset' button, which is also enclosed in a red rectangular box.

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



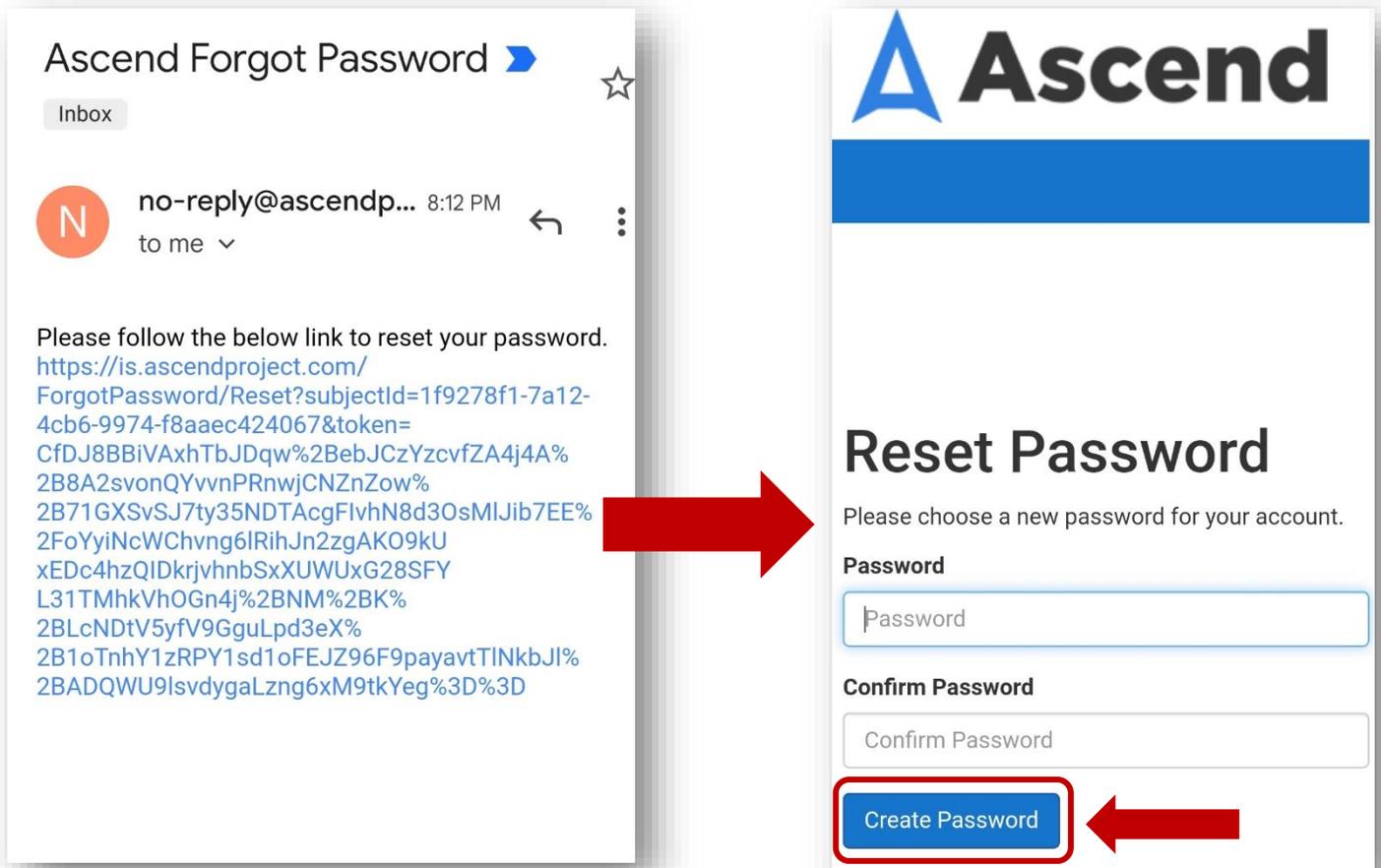
The screenshot shows an email message with the following content:

Forgot Password

Please check your email at *nattycook23@gmail.com* for further instructions.

[Click here](#) to go back to the login page.

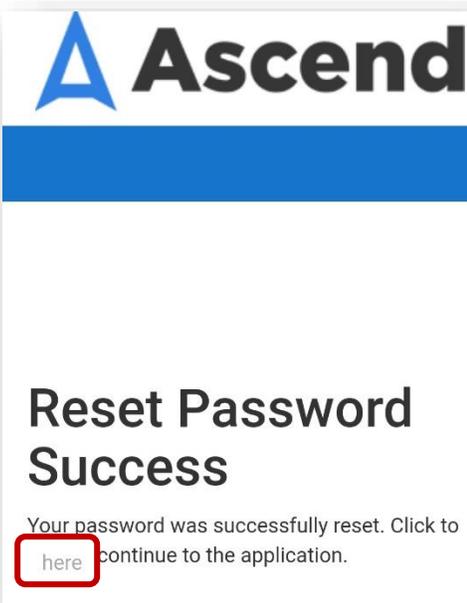
173. Click on the link in your email to reset your password and once you have entered your new password, click on the “Create Password” button



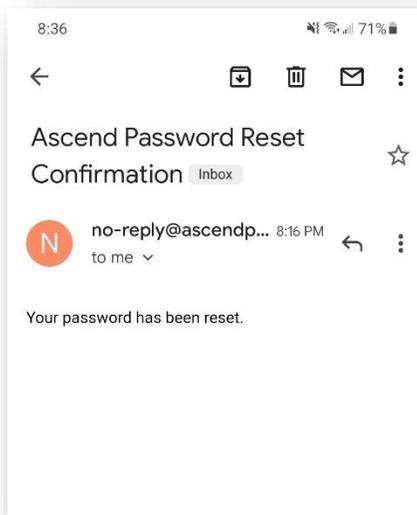
The image shows two side-by-side screenshots. The left screenshot is an email titled "Ascend Forgot Password" from "no-reply@ascendp...". The email body contains a long URL for password reset. A red arrow points from this URL to the right screenshot. The right screenshot is the "Reset Password" web form, which includes fields for "Password" and "Confirm Password", and a "Create Password" button highlighted with a red box and a red arrow pointing to it.

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



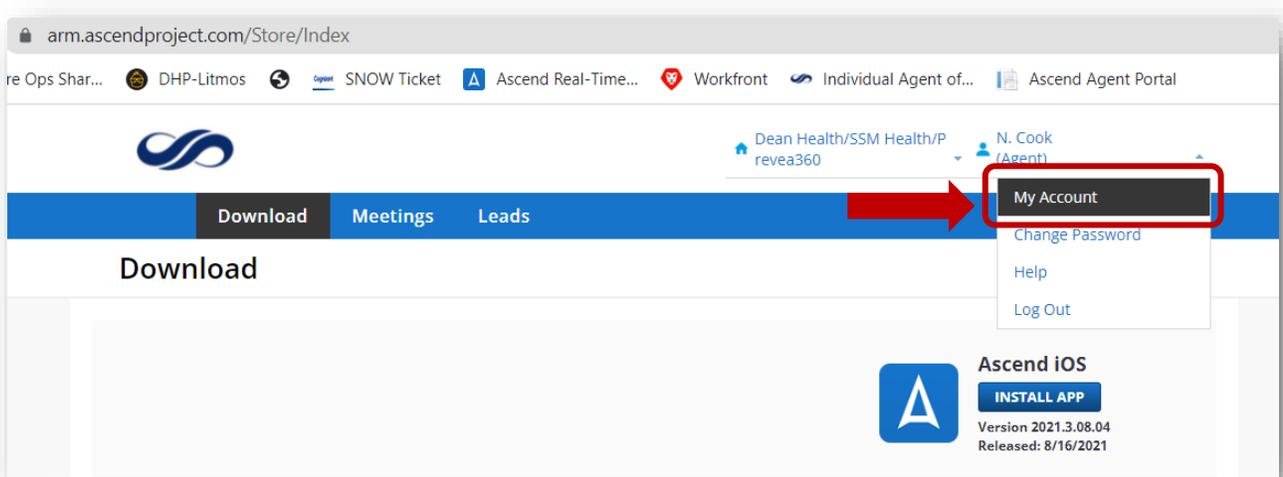
The image shows the "Reset Password Success" page. It features the Ascend logo at the top and the heading "Reset Password Success". Below the heading, it says "Your password was successfully reset. Click to here continue to the application." The word "here" is enclosed in a red box.



The image shows an email titled "Ascend Password Reset Confirmation" from "no-reply@ascendp...". The email body contains the text "Your password has been reset."

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

A screenshot of the 'My Account' form. The form title is 'My Account'. Below the title, there is a note: 'Fields followed by (*) are required.' The form is divided into two main sections: 'Account Info' and 'Phone Numbers'. In the 'Account Info' section, there are input fields for 'Email: *' (nattycook23@gmail.com), 'First Name: *' (Natasha), and 'Last Name: *' (Cook). In the 'Phone Numbers' section, there are input fields for 'Primary Phone: *' (608-393-8670), 'Home Phone:', 'Fax Number:', 'Mobile Phone:', and 'Office Phone:'. At the bottom of the form, there are two buttons: 'Save Changes' and 'Merge Accounts'. A red arrow points to the 'Save Changes' button, which is also highlighted with a red box.

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