



## New telephonic enrollment option through the Ascend Virtual Sales Office app

The **Remote Agent Telephonic Enrollment (RATE)** tool is a powerful, new feature that lets you enroll your clients by phone, after you've completed the initial face-to-face meeting with them. It's available through the Ascend Virtual Sales Office app.

To use RATE, you must have an iPad. You'll also need to complete a short user training and quiz. Just contact your local Aetna Medicare broker manager to schedule a training session.

### How it works

**Step 1:** First, you meet with your client and provide the required sales presentation and materials. (Please note that RATE does not replace your one-on-one client appointments.) If your client decides to enroll sometime after that meeting, you can schedule an appointment to complete the enrollment by phone.

**Step 2:** At the scheduled date and time, your client will call you on your unique RATE-specific 1-800 phone number. You'll receive that call on your iPad.

**Step 3:** Next, you'll walk them through an approved telephonic enrollment script that's built into RATE to complete the enrollment. The calls are instantly and automatically recorded.

### What are the benefits?

- **Save money** — Enrolling by phone saves you from driving back to clients' homes to complete their enrollment. You'll save on gas, tolls and vehicle wear and tear.
- **Save time** — RATE helps shorten the sales cycle, so you can see more clients.
- **Ensures compliant selling** — When you use this option, the enrollment call is instantly and automatically recorded, which can help protect you from complaints.

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# How can you start using RATE?

- 1. Download the Ascend app.** First, make sure you have access to the Ascend Virtual Sales Office app. To register: 1) Go to **Producer World** and click on the “Individual Medicare” tab. 2) Click on “Ascend Virtual Sales Office app,” under the “Tools” tab. 3) Click on the “Request access” box. 4) Answer one question and submit your request; you should hear back within 2–7 days.
- 2. Contact your local Aetna Medicare broker manager to schedule and complete training.**
- 3. Take the quiz and receive your dedicated phone number.** After training, you’ll be able to access a required RATE quiz through the Ascend app. You must pass with a 90% score. After passing, an Aetna representative will email you your assigned 1-800 number within 1–2 days.
- 4. Adjust your iPad settings to ensure you can receive and record calls.** RATE and Ascend run on iOS technology. So, calls can only be answered through the Ascend app on an iPad. Adjust your settings as shown below.

- Settings>Do Not Disturb>Allow Calls From>Everyone
- Settings>Sounds>Ringer and Alerts
- Settings>Privacy>Microphone>Ascend Aetna

- 5. Perform a test.** Confirm that you can receive client calls and messages. Turn on your RATE function and call your own 1-800 number. Listen to both the “Accepting calls” and “Not accepting calls” messages.
- 6. Click the “Enroll a client over the phone” tile** on the Ascend app home screen to start scheduling telephonic enrollment appointments.

## Questions?

For more information about the RATE tool, or to schedule a training session, contact your local Aetna Medicare broker manager today.

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