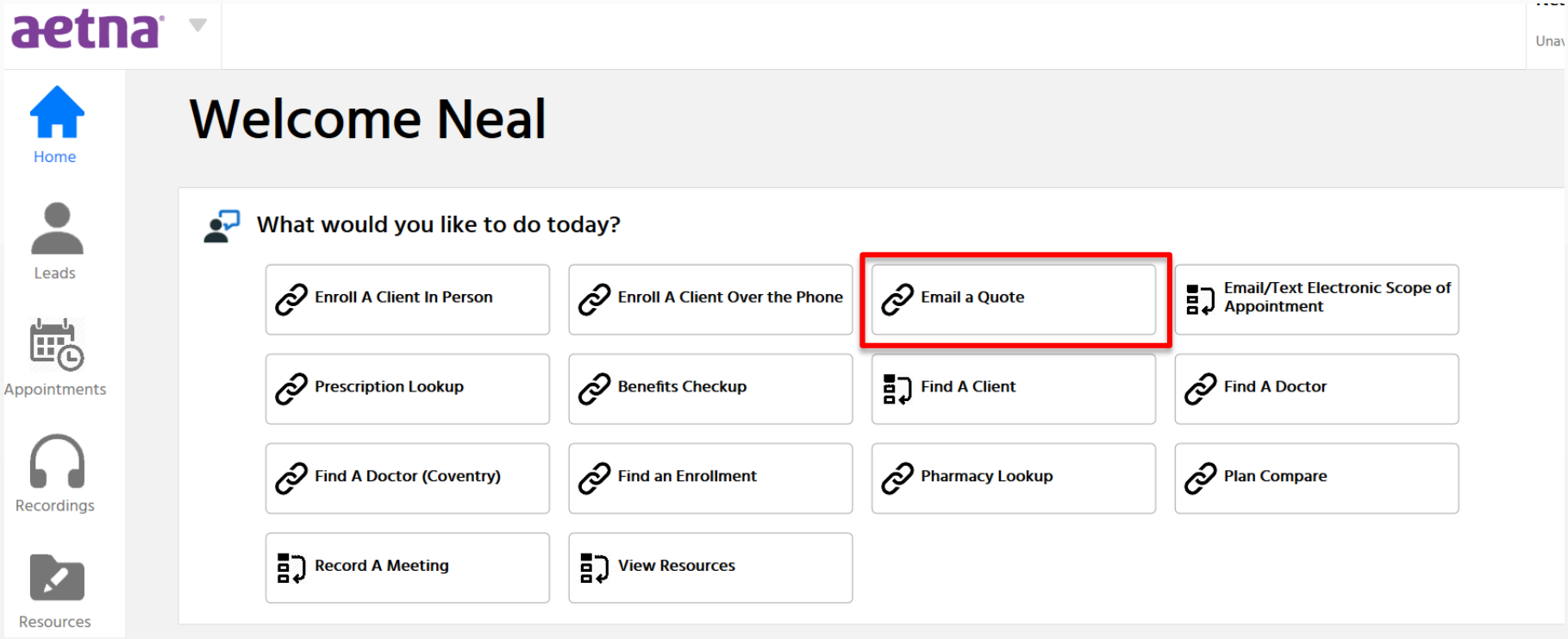
Getting Started/ E-Quote and enroll

Logging In

- First, log into your Ascend mobile application
- Click ‘Email A Quote’ to continue



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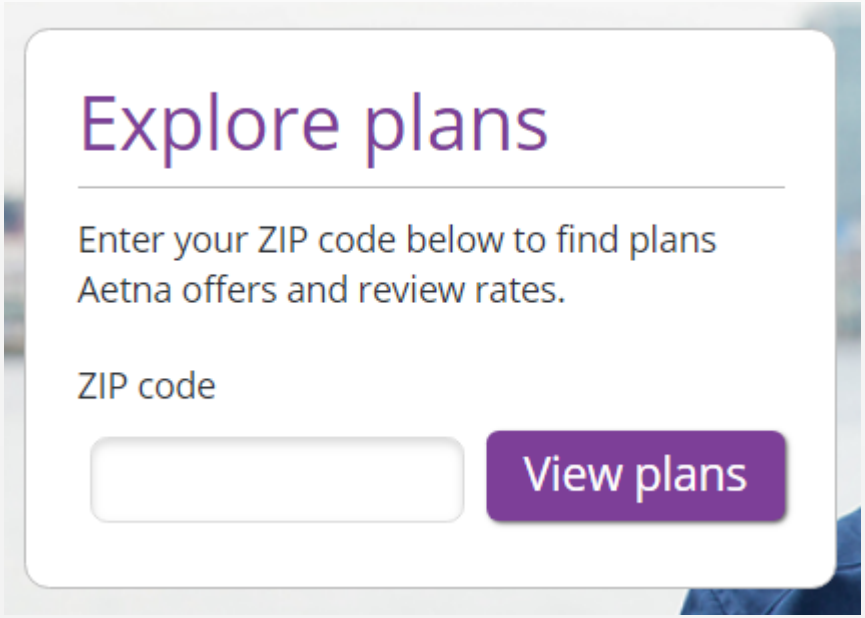
Entering the Zip Code

- Enter the zip code of the location you would like to search for plans
  - Note you may be prompted to select the county from a drop down list as well
- Click ‘View Plans’ to continue



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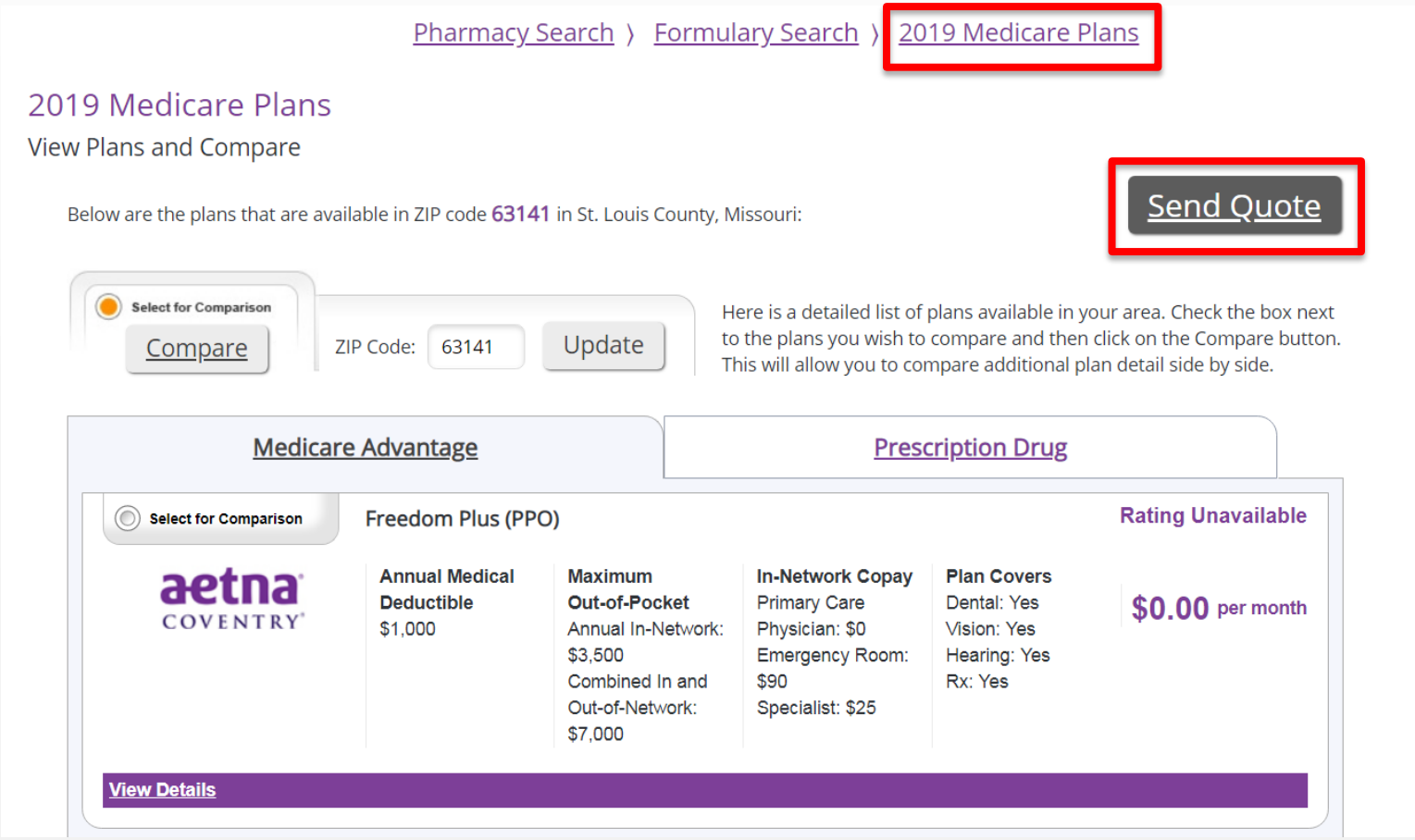
Sending a Quote

Sending a Quote

- Proceed to the last tab at the top of the page called '2019 Medicare Plans'
- On the last tab, select 'Send Quote' to proceed



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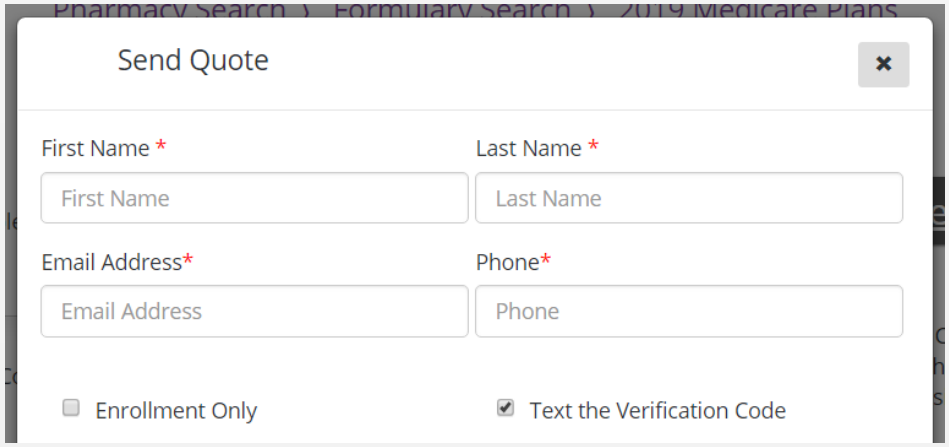
Entering the Beneficiary's Information

- A window will populate and prompt you to enter the beneficiary's information at the top of the screen
- Select the box next to 'Enrollment Only' to take your beneficiary directly to the enrollment application
- Select 'Text the Verification Code' to send the beneficiary their verification code to access the applications
    - Note: if the beneficiary is not able to receive text messages, you will have to verbally tell them their verification code



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Selecting Plans to Send

- To view the plans, select the arrow next to Medicare Advantage, and/or Prescription Drug Plan
- To select the plan, click the box next to the one you want to choose
  - A black check will indicate you have selected the plan
  - You can select multiple plans in the list

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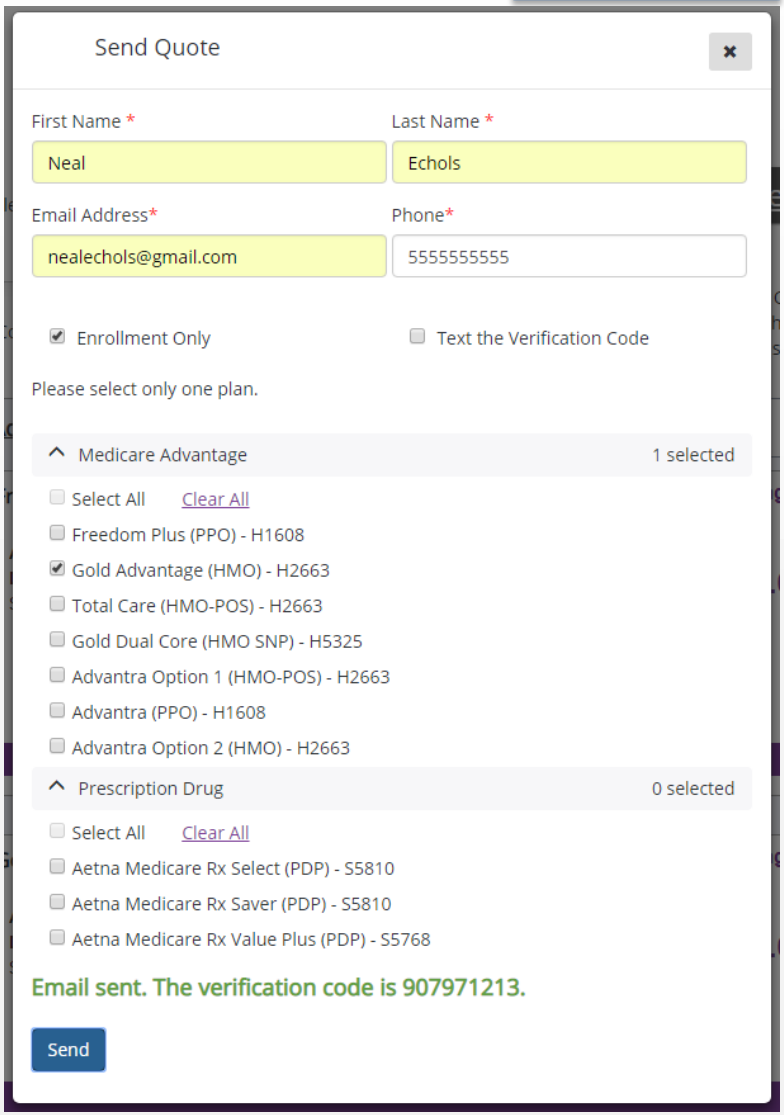
Confirmation it Has Sent

- Once the form has been completely filled out, click ‘Send’ to send the verification code and plans to the beneficiary
- You will see green text appear at the bottom of the form confirming the email and text message (if applicable) were sent
  - A verification code will also be included in this text. If the beneficiary did not have a cell phone to send the code to, please verbally tell them the code now

Click the ‘x’ to close the form



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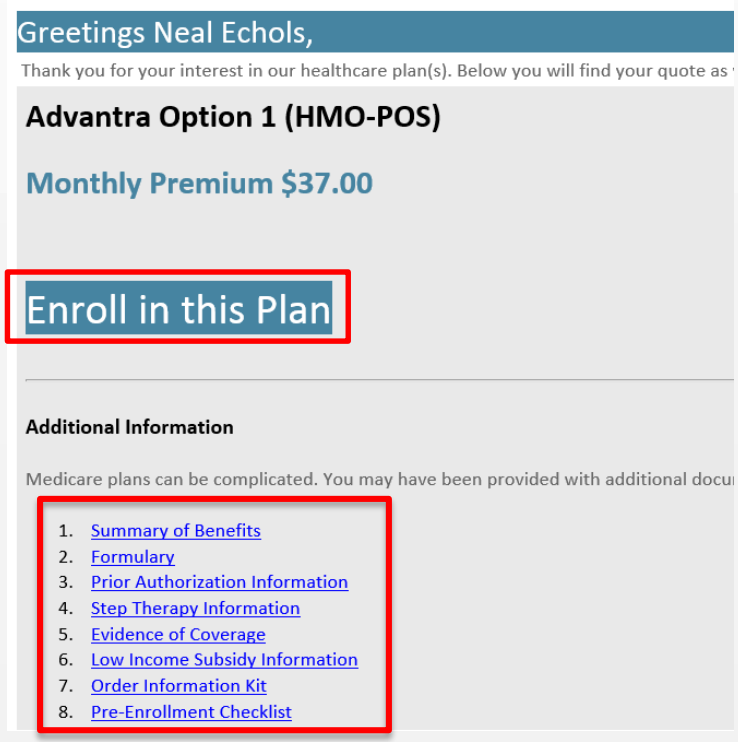
Viewing the Plans

Obtaining the Email

- To obtain the email, the beneficiary will need to log into their email account and check their inbox for a message from the carrier
- Select ‘ENROLL IN THIS PLAN’ to enroll in the plan sent
- Additionally, E-Kit information will be available for the beneficiary to view



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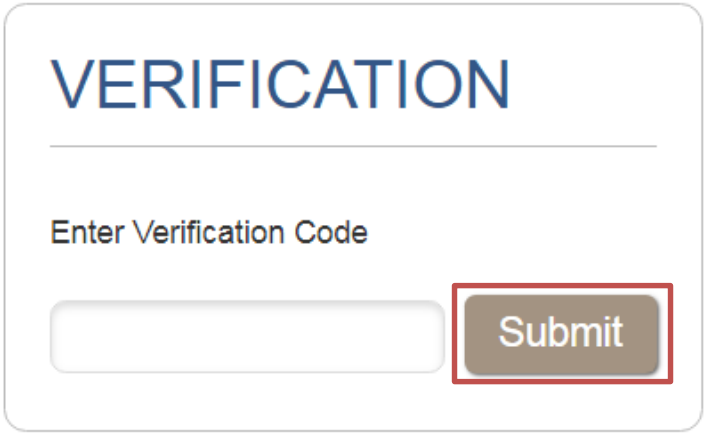
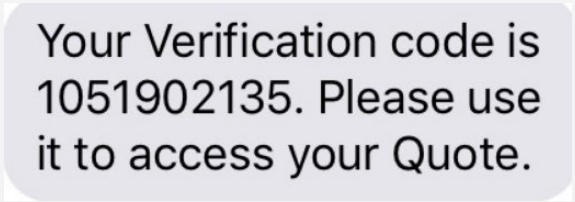
Viewing the Plans



- On the next screen, the beneficiary will be prompted to enter the verification code
  - If it was not given to them orally, then they will need to open their text messages to find the code. The message will read something similar to the one below:



- Enter the code into the box, then click ‘Submit’ to continue

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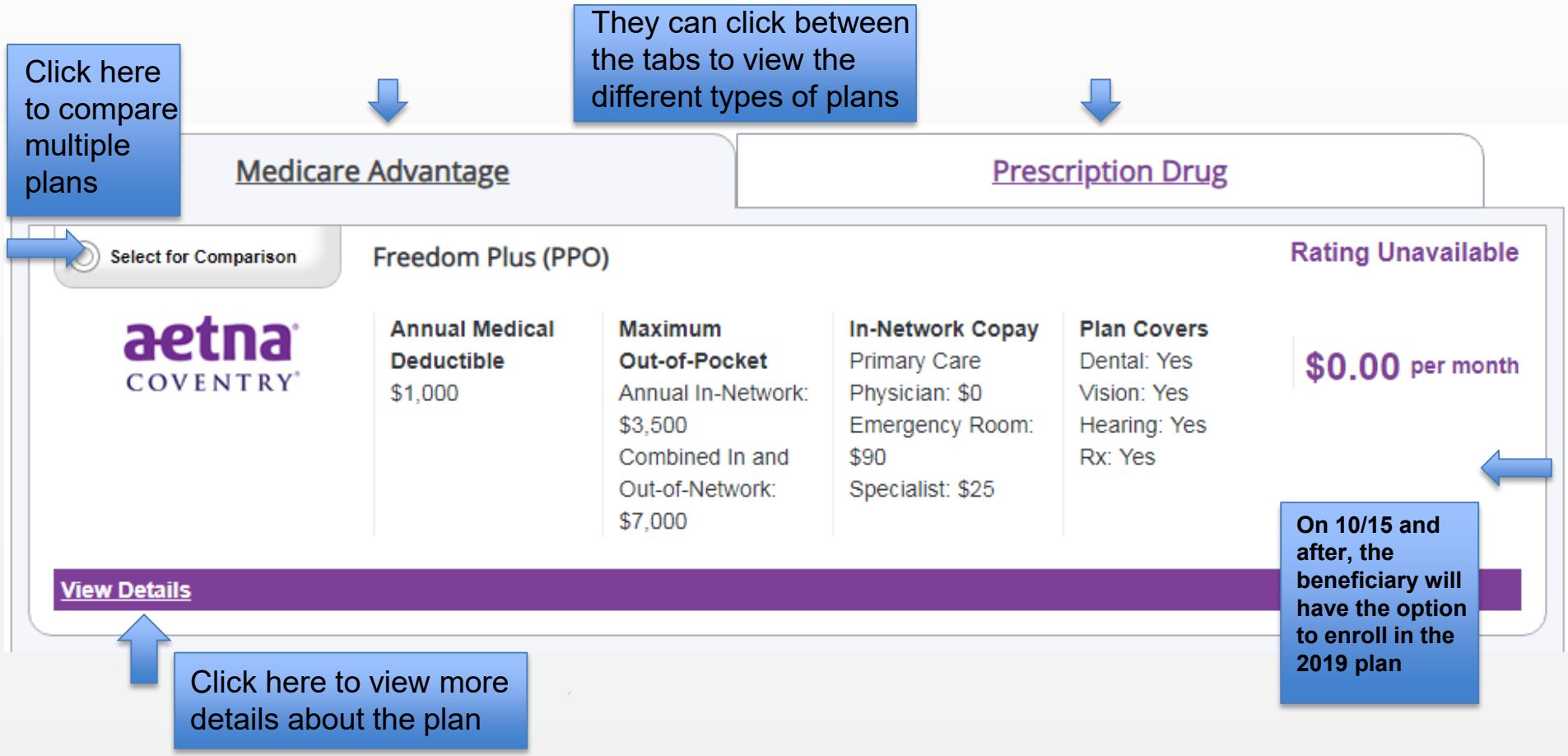
Comparing the Plans

- If you ***did not*** check the box next to 'Enrollment Only', they will be taken to this page where they can compare the plans that were sent to them



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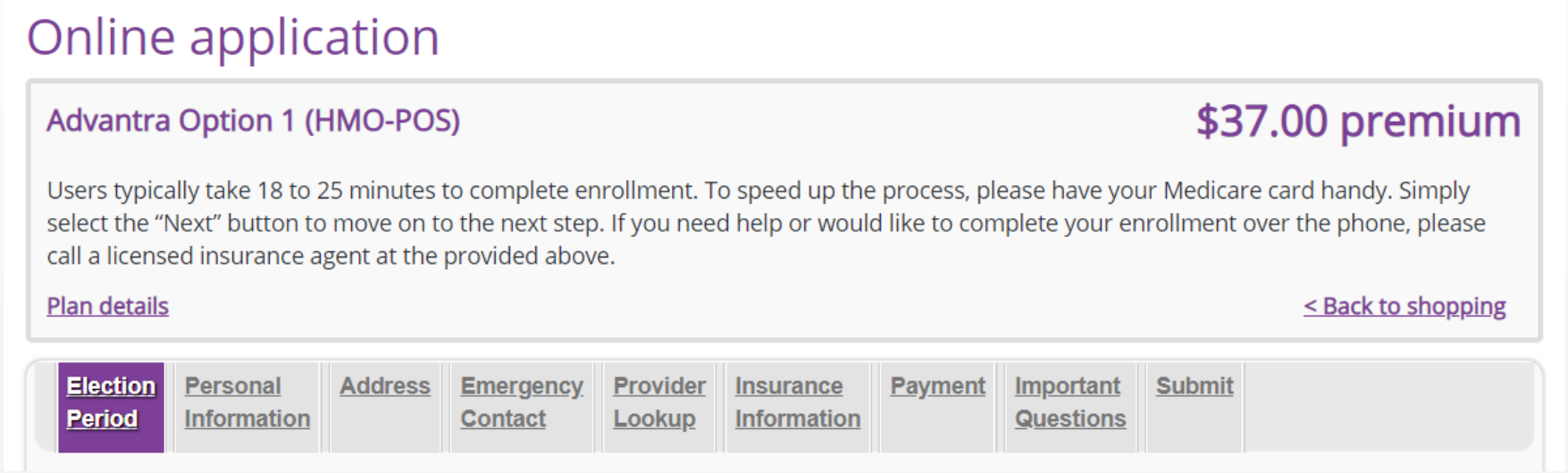
Enrollment Only

- If you checked the box next to ‘Enrollment Only’, they will be taken to this page where they can complete the enrollment application



- If the beneficiary chooses to complete the application, the agent that sent them the Quick Quote will get credit for the enrollment

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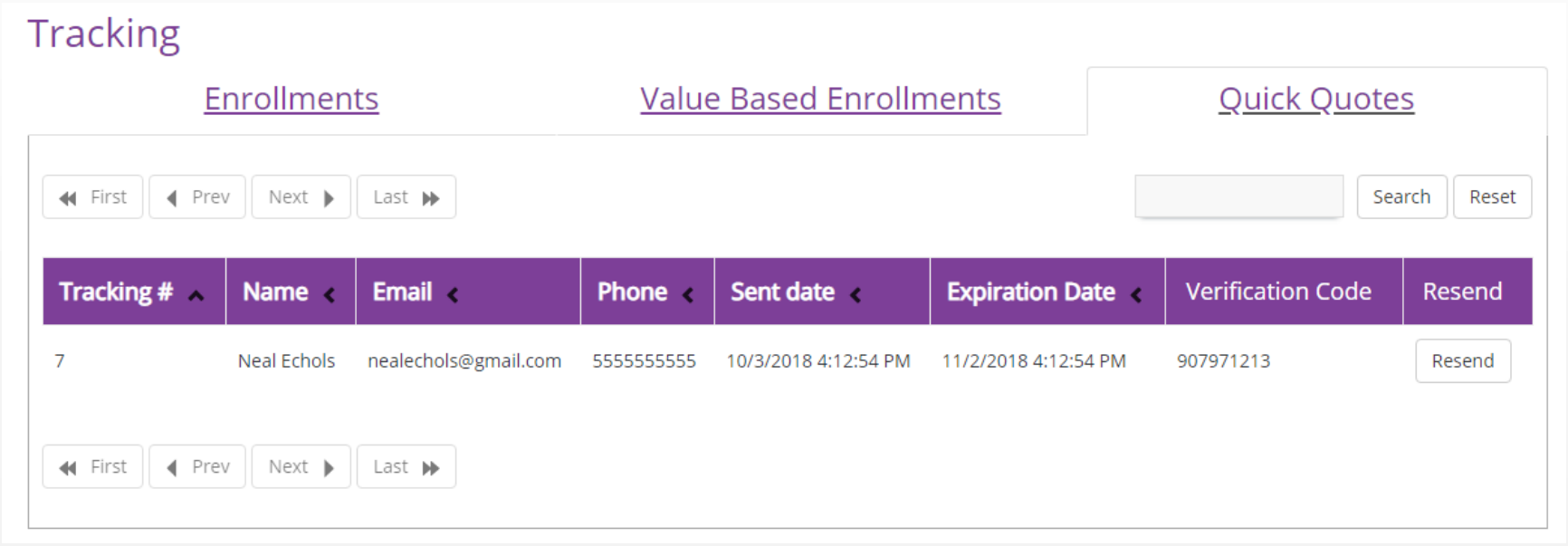
Viewing Sent Quick Quotes

Agent Portal

- Agents have the ability to view Quick Quotes they have sent to beneficiaries
- To view them, go to your Agent Portal then click the 'Quick Quotes' tab at the top of the screen



Note: The beneficiary's information will expire if too much time has passed

You can resend quotes by clicking 'Resend'

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Resending Quotes

- When resending quotes, you can choose between two options:
  - Resend Quote – This option will only resend the email containing the plan(s)
  - Resend Quote and text the verification code – This option will resend the email containing the plan(s) as well as resend the text message containing the verification code

- Click ‘ Send’ once you have selected an option
- A confirmation will appear letting you know the email and text message (if applicable) were sent

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