

Enroll your clients using e-kits

E-kits are an easy and compliant way to help your clients enroll in the Aetna Medicare (MA/MAPD) or SilverScript PDP plan when you're not able to meet with them in person.

Plus, you can now offer the value-based enrollment (VBE) option to your e-kit clients after they enroll. VBE is a great way to help your clients engage with their new plan early. And you can earn a service fee of up to \$50 for each enrollee who chooses to participate.

Why use e-kits?

E-kits is a function within the Ascend Virtual Sales Office app that lets you send your clients an email with a link to enroll.

When your clients use that link to enroll, you'll be retained as the writing agent on the sale. It's that easy.

What you need to know

- E-kits work with any Windows-based laptop or an iPad device.
- All you need is access to the Ascend Virtual Sales Office app. No special setup or extra training required.
- Available in English and Spanish.

Getting started

Before you start using e-kits, you must have access to the Ascend app; see page 2 for instructions.

Next, after obtaining a completed Scope of Appointment, when you're ready to send an e-kit, you'll follow these steps:

1. Open the Ascend app,
2. Click "Email a Quote."
3. In the pop-up box, enter your client's ZIP code and click "View Plans."
4. Click "Send a Quote."
5. Enter the name and contact info for the person you're sending the quote to.
6. Select one or more plans for them to review.
7. Then click "Send."

After you press "Send," your client gets:

- A text message with a unique verification code that they'll need to use to enroll.
- An email containing all of the required plan documents for the selected plans, and a link to enroll.



How to enroll

To enroll, your client just needs to click the “Enroll in the plan” link in the email message, and then enter the verification code they received via text, when prompted.

Tips for success

- When assisting multiple people in one household, make sure you send a separate email quote to each person you intend on enrolling. Each person needs and must use a separate verification code to ensure you get credit each enrollment.
- Encourage your clients to copy down the enrollment confirmation number that appears at the end of the online enrollment process.
- Be sure to talk to your client about VBE in advance. If they want to take advantage of this option, they need to initiate the VBE after enrolling, *but before closing out of the application.*

Initiating VBE after an e-kit enrollment

After completing the enrollment application, your client will land on the confirmation summary page and will see the VBE response options. Your client can

then choose “connect me now” to initiate a VBE call right away; “schedule a callback” to schedule a call for a future time; or “Decline.” To learn more about VBE, just reach out to your Aetna Medicare Broker Manager.

Need access to Ascend?

The Ascend Virtual Sales Office app is our electronic enrollment tool for agents, and you must have access to it (i.e., have an active license) to use e-kits and our other remote-selling tools.

- To request access, just login to Producer World and fill out an [Ascend app request form](#). Please note that it may take 2-7 days to process new user requests.
- If you were granted an Ascend license in the past, but your license is currently inactive, please send a reactivation request to ascendhelp@aetna.com. Include your name and National Producer Number in the request.

Questions? We’re here to help

For more information about e-kits, VBE, the Ascend app, or any other Aetna Medicare or SilverScript PDP-related topic, just contact your local Aetna Medicare broker manager.

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