



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 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. After passing your quiz, you'll receive a dedicated 1-800 number that you can use with the RATE tool.

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 of RATE?

It can help you:

- **Ensure compliant selling** — When you use this option, the enrollment call is instantly and automatically recorded, which can help protect you from complaints.
- **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 assist more clients.

How can you start using RATE?

- 1. Download the Ascend app.** You will receive a welcome email with download instructions. You'll download the Ascend app and log in based upon those instructions. *Beginning July 1, 2020, all newly ready-to-sell agents will be given an Ascend license.* The welcome email should follow your RTS status. If you don't know where to find the download instructions, please email ascendhelp@aetna.com.
- 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.** Calls can only be answered through the Ascend app on an iPad or Windows-based device. Just make sure you adjust your settings based on the device you're using.
 - iPad devices:
 - Allow calls from everyone
 - Turn on your ringer and alerts
 - Turn on the microphone for the Ascend app
 - Windows devices:
 - Turn on your microphone
- 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. Enroll a prospect by telephone.** Select "Enroll a Prospect." For the "Is this a telephonic enrollment" question, click "yes." You can now schedule telephonic enrollments.

Questions?

For more information about the RATE tool, or to schedule a training session, contact your local Aetna Medicare broker manager today. To register for an upcoming training, go to www.aetnamedicareagenttraining.com.

AetnaMedicare.com



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