



# 2018 Ascend Enhancement

# New Home Screen, New Look, New Functionality!


## Welcome Leslie





What would you like to do today?

Only available to RATE trained agents\*


Click through tiles!

 Enroll a Client in Person


 Enroll a Client over the Phone


 Email a Quote


 Email/Text an Electronic Scope of Appointment


 Prescription Lookup


 Sales Presentation Video (Aetna MAPD)

 Benefits Checkup


 Find a Client

 Find a Doctor

 Find an Enrollment

 Pharmacy Lookup

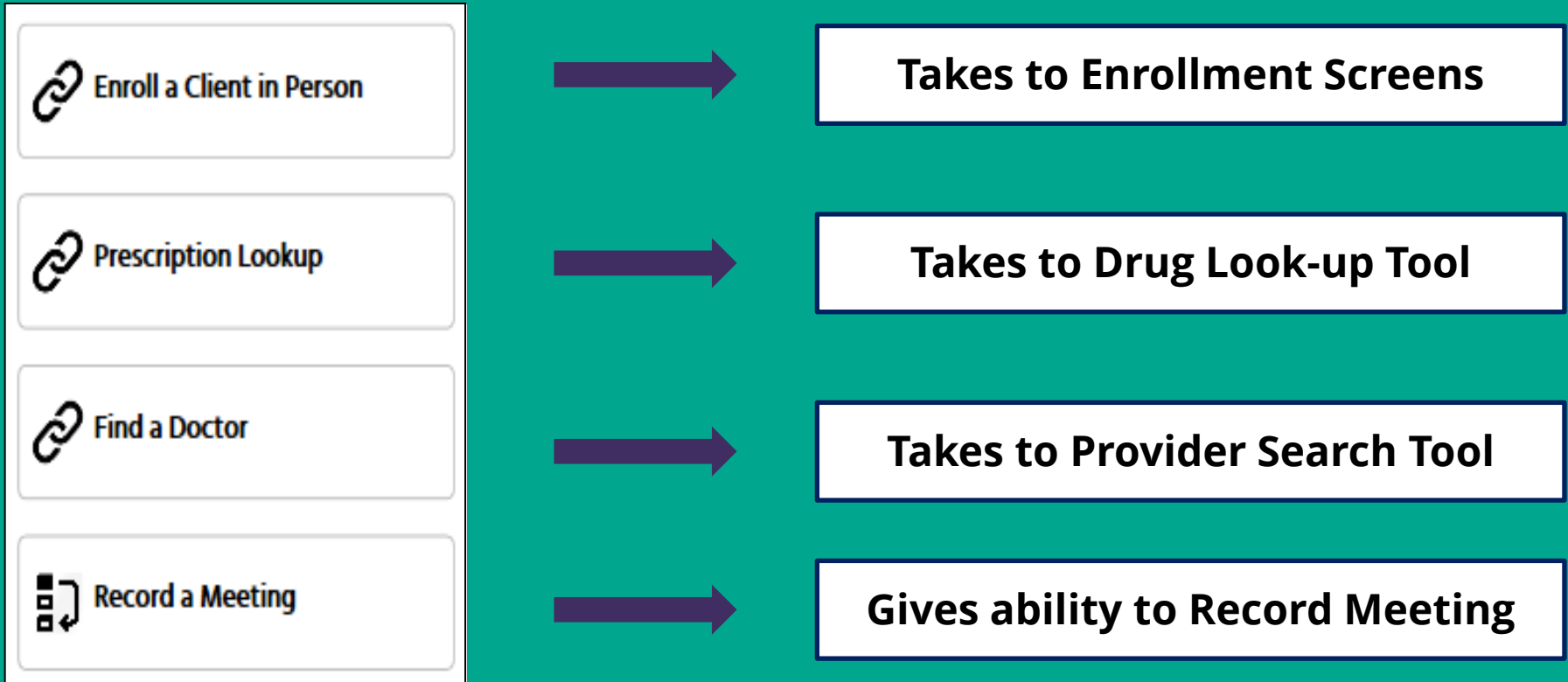
 Plan Compare

 Record a Meeting

 View Resources

\*Contact your local Broker Manager for more information!

# Click through tiles





**This tile will only be available for RATE approved users. This tile takes you to the Enrollment Screens**


**Takes to Sales Presentation Video**

**Takes to Search Profiles and Enrollments screen**


**Takes to the Resources Folder**


 **Enroll a Client over the Phone**


 **Sales Presentation Video (Aetna MAPD)**

 **Find an Enrollment**

 **View Resources**

 Email a Quote

 Benefits Checkup

 Pharmacy Lookup



**Takes to Quick Quote Option (Ekit)**



**Takes to Benefits Check-Up Screen**



**Takes to Pharmacy Finder**

**This is the only instance in which you must create a lead. Please follow existing process.**





**Takes to Lead Search**




**Takes to Compare Plan Screen**



 Email/Text an Electronic Scope of Appointment

 Find a Client

 Plan Compare

# Need Help?

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For technical questions, contact the Ascend Help Desk:

**866-338-7772**

[help@ascendproject.com](mailto:help@ascendproject.com)

For licensing questions, contact the Aetna Internal Help Desk:

[ascendhelp@aetna.com](mailto:ascendhelp@aetna.com)

Contact your local **Broker Manager** for more information on the **RATE** functionality!