



Ascend

Ascend Virtual Sales Office (VSO) App & Value Based Enrollment (VBE) Program

A User Guide & Training Series



Full list of Ascend Training: This Topic Covers ...

- Getting Started with Ascend
- My Ascend Settings
- Adding a Lead
- Electronic Scope of Appointment (eSOA)
- Ascend Virtual Meeting – Video
- Year Over Year Plan Change Tool
- Email a Quote (eKit)
- **Pre-Filled Application and Digital Signature**
- Blue Button
- Pharmacy Search
- Formulary Search
- Doctor Search
- Extra Help Eligibility
- Enroll a Prospect
- Initiating a Value Based Enrollment (VBE)
- The Agent Portal
- My Book of Business
- VBE Service Fees and Payments
- The Sandbox Mode

What is the Ascend Virtual Sales Office (VSO)?



- Also known as the Ascend Mobile Application (AMA), or simply the Ascend app.
- It is a modular system with many functions designed to assist sales agents with:
 - Electronic scope appointment (eSOA)
 - Audio recording capabilities of your sales meetings
 - Remote Agent Telephonic Enrollment (RATE) capability
 - Electronic application submission


What is the Ascend Quote & Enrollment (AQE) Tool?


- A tool in Ascend that gives you the capability to compare plan info and choose the best plan for your prospect
- Ability to create your member profile with provider info, formulary and pharmacy choices
- Functionality to create and send an eKit, or text or email a Quote to your prospect
- Where you can complete and submit the online enrollment application





Pre-filled Application & Digital Signature


Click 'Enroll a Prospect'



Home



Leads



Appointments



Recordings



Resources





 What would you like to do today?


 Enroll A Prospect


 Year Over Year Plan Change Tool


 2019/2020 Aetna Medicare Producer Guide


 Email a Quote


 Email/Text Electronic Scope of Appointment


 How to use RATE


 How to use the eKit


 Prescription Lookup


 Benefits Checkup


 Find A 2019 DRx Enrollment

 Find A 2019 Enrollment


 Find A 2020 Enrollment

 Find A 2020 SilverScript Enrollment

 Find A Client

 Find A Doctor

Select appropriate plan year / plans




Aetna

What plan year are you enrolling in?

2020 Plans

2021 Plans

2020 Silverscript PDP Plans



Aetna

Is this a telephonic enrollment?

Yes

No

Select 'YES' if enrolling a client using the RATE feature

Select 'NO' if not using RATE to enroll a client

The Ascend quoting and enrollment tool

Hello Agent!
NPN: 123456

[Agent portal](#) | [Saved applications](#) | [Admin Portal](#) | [Log off](#)



Plan Year

2021 ▼

Enter the client's ZIP Code,
then click 'View Plans'



Explore plans

Enter your ZIP code below to find plans
Aetna offers and review rates.

ZIP code

[View plans](#)

Disclaimer of warranties and liabilities

Aetna Medicare is a HMO, PPO plan with a Medicare contract. Our SNPs also have contracts with State Medicaid programs. Enrollment in our plans depends on contract renewal.

Every year, Medicare evaluates plans based on a 5-star rating system.


For a complete list of available plans please contact **1-800-MEDICARE** (TTY users should call **1-877-486-2048**), 24 hours a day/7 days a week or consult www.medicare.gov.

For mail-order, you can get prescription drugs shipped to your home through the network mail-order delivery program. Typically, mail-order drugs arrive within [x] days. You can call [phone number/TTY/hours of op] if you do not receive your mail-order drugs within this timeframe. [Members may have the option to sign-up for automated mail-order delivery.]

Complete all necessary steps, then select 2021 Medicare Plans

Hello Agent!
NPN: 123456

[Agent portal](#) | [Saved applications](#) | [Admin Portal](#) | [Log off](#)




Plan Year
[Home](#) 2021 ▾

[Print](#)


[Blue Button](#) › [Pharmacy Search](#) › [Formulary Search](#) › [Doctor Search](#) › [Extra Help Eligibility](#) › [2021 Medicare Plans](#)

Blue Button from Medicare



Using the Medicare Blue Button connection, many consumers can import their Doctors, Prescriptions, and Pharmacies from the previous year. This will assist in choosing a new plan for this year by allowing you to have a complete history loaded in the health plan selection tool.

You have full control over how your data can be used by logging into MyMedicare.gov in a few easy steps.

[Connect to MyMedicare.gov](#)  [No, I prefer to enter my information manually](#)

Need help with additional plan info?
Call an Aetna representative at **1-800-282-5366 (TTY: 711)**. 7 days a week, 8 a.m. to 8 p.m. for assistance with customer service/benefits questions.

Disclaimer of warranties and liabilities

Aetna Medicare is a HMO, PPO plan with a Medicare contract. Our SNPs also have contracts with State Medicaid programs. Enrollment in our plans depends on contract renewal.

Every year, Medicare evaluates plans based on a 5-star rating system.

For a complete list of available plans please contact **1-800-MEDICARE** (TTY users should call **1-877-486-2048**), 24 hours a day/7 days a week or consult www.medicare.gov.

For mail-order, you can get prescription drugs shipped to your home through the network mail-order delivery program. Typically, mail-order drugs arrive within [x] days. You can call [phone number/TTY/hours of op] if you do not receive your mail-order drugs within this timeframe. [Members may have the option to sign-up for automated mail-order delivery.]

For the 2020 plan year, Aetna Medicare's pharmacy network includes limited lower cost preferred pharmacies in: Urban and Rural Michigan, Rural Nebraska, Rural Maine, Suburban Illinois, Suburban South Carolina. The lower costs advertised in our plan materials for these pharmacies may not be available at the pharmacy you use. (Updated 10/2020)



Call an Aetna representative at 1-800-282-5366 (TTY: 711), 7 days a week, 8 a.m. to 8 p.m. for assistance with customer service/benefits questions.



Complete the required fields and click 'Send'

Last name: *

Gender: *

Birthdate: *

Phone:

Email address:

* Required information

Back

Next

Save

Send for signature

Send Partial Application for Signature

Beneficiary First Name *

John

Beneficiary Last Name *

Tester

Email*

Email

Beneficiary Phone*

Beneficiary Phone

☒ Text verification code

☒ Email verification code

☐ Add a custom message

Send

Click the box is agent prefers to write a message to client

[Evidence of Coverage](#)

[Evidencia de Cobertura \(Español\)](#)

[Low Income Subsidy Information](#)

[Subsidio de Bajos Ingresos \(Español\)](#)

[Order Information Kit](#)

[Solicite un Kit de información \(Español\)](#)

[Star Ratings](#)

[Clasificación Por Estrellas \(Español\)](#)

Email received by prospect in their inbox from 'Aetna'

The screenshot shows a Gmail inbox interface. At the top, there's a Google search bar and a user profile for 'Rapportive - John Doe'. The left sidebar shows the 'Inbox (12,992)' and other folders like 'Important', 'Sent Mail', 'Drafts (111)', and 'Circles'. A red arrow points from the 'Circles' section to the 'Aetna' email in the main list. The main list shows various emails, with the 'Aetna' email highlighted in a red box. The email subject is 'Pepper Potts wants to share health insurance options – Greetings John Doe. This email from Aetna con' and the time is '2:24 pm'.

Sender	Subject	Time
Gartner BI Magic Quadrant	See Where BI is Going in 2013. - QlikView.com/Magic_Quadrant - Don't Make A Move Without It!	Why this ad?
Google Alerts	Google Alert - open streets minnesota - News 1 new result for open streets minnesota Open Streets Buffalo KSTP.co	3:50 pm
Spotify	This Week's New Music - See what's new on Spotify View in your browser Spotify They came, they saw, they rocked!	3:37 pm
FAVES + CO.	[New post] Reddit promotes "Restore Your Rights Rally" on July 4th - Sarah posted: "Reddit is the one of the main	3:33 pm
Rick Kupchella	The Afternoon News - To view this email as a web page, go here. Email not displaying correctly? View it in your brows	3:31 pm
SuddenBlitz Alert	57% OFF! \$16 for a 8 pack of Mach 3 Turbo Refill Blades with Free shipping a (\$36.99 Va... - Please add campaigns	2:40 pm
Laura Kaslow via LinkedIn	RE: Opportunity with Allina? - Laura Kaslow Communications expert with a focus in public relations Hi Arik. Thanks fo	2:25 pm
Aetna	Pepper Potts wants to share health insurance options – Greetings John Doe. This email from Aetna con	2:24 pm
PR Daily Extra	Writing tips for the Web - PR Daily News Feed 13 writing tips for the Web Writing & Editing 13 writing tips for the Web ,	1:56 pm
Social Media Insider Sum.	Where new business begins and genuine friendships are born (Social Media Insider Summit... - Social Media Inside	1:51 pm
FAVES + CO.	[New post] Don't let technology take the place of face-to-face interactions in your fam... - Sarah posted: "It was rec	1:42 pm
Open Immediately	Home Depot Rewards - \$100 Value. Participation Requirements... Good, better and great content from Work	1:28 pm
AirTran Airways Net Esca.	Get Your Beach On - Mexico & the Caribbean on sale! - Deals on flights for travel 8/20 - 12/18/13, car rentals, hotels,	1:11 pm
PREMIER Bankcard	A First Premier Bank Credit Card Offer is waiting. Helping ... If you would rather not be contacted by First PR	1:10 pm
FAVES + CO.	[New post] Apply to speak at TED@NYC talent search - Sarah posted: "In 2014 TED will celebrate their 30th anniver	1:00 pm
PR Daily	5 reasons reporters hate your pitches (and how to solve them!) - They're too long! The quotes are not "human." They sc	12:34 pm
Larsmont Cottages	E-Break From Lake Superior - Reserve Your Stay A friend told me about a cow moose with twin calves that have bee	11:59 am

Email received by prospect with 'Verification Code',

Neal Echols wants to share health insurance options.  Inbox x



Aetna <donotreply@quotes.isf.io>
to me ▾

1:48 PM (47 minutes ago) ☆ ↶ ⋮

You've been sent an email containing a link. Following the link, you'll be asked to input this Verification Code: 1794552181

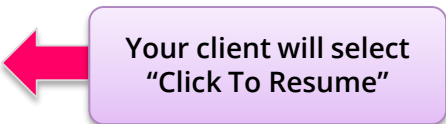
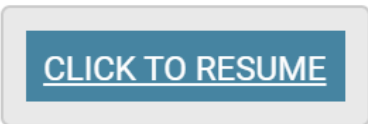
Aetna <donotreply@quotes.isf.io>
to me ▾

1:48 PM (47 minutes ago) ☆ ↶ ⋮

Greetings John Doe,

This email from Aetna contains an application that needs your signature. Please click on the button below to resume the application.


Agent's Message : test from Neal



Neal Echols

Aetna
Call: [812-929-1969](tel:812-929-1969)
nealechols@gmail.com

Your client will enter the 'Verification Code' and click 'Submit'



Home

A _ A _ A

Print

Verification

Enter Verification Code

1794552181

Submit

Need help with additional plan info?

Call an Aetna representative at 1-800-282-5366 (TTY: 711). 7 days a week, 8 a.m. to 8 p.m. for assistance with customer service/benefits questions.

Your client may proceed to the 'Submit' after reviewing all the tabs, then click 'Next'

Online application

Aetna Medicare Premier (HMO)

\$0.00 premium

Users typically take 18 to 25 minutes to complete enrollment. To speed up the process, please have your Medicare card handy. Simply select the "Next" button to move on to the next step. If you need help or would like to complete your enrollment over the phone, please call a licensed insurance agent at the provided above.

[Plan details](#)[Back to shopping](#)

Election Period

Personal Information

Address

Emergency Contact

Provider Lookup

Insurance Information

Payment

Important Questions

Submit

Please Read This Important Information

The following disclosures describe our health benefits and health insurance plans and how they work. It's important for you to read them before you submit your enrollment form. Check the box to confirm you have read all the disclosures.

If you currently have health coverage from an employer or union, joining the Aetna Medicare Advantage plan could affect your employer or union health benefits. You could lose your employer or union health coverage if you join the Aetna Medicare Advantage plan. Read the communications your employer or union sends you. If you have questions, visit their website, or contact the office listed in their communications. If there isn't any information on whom to contact, your benefits administrator or the office that answers questions about your coverage can help.

The Aetna Medicare Advantage plan is a Medicare Advantage plan and has a contract with the Federal government. I will need to keep my Medicare Parts A and B, and continue to pay my Part B premium. I can only be in one Medicare Advantage plan at a time, and I understand that my enrollment in this plan will automatically end my enrollment in another Medicare health plan or prescription drug plan. It is my responsibility to inform you of any prescription drug coverage that I have or may get in the future. (For MA-only plans) I understand that if I don't have Medicare prescription drug coverage, or creditable prescription drug coverage (as good as Medicare's), I may have to pay a late enrollment penalty if I enroll in Medicare prescription drug coverage in the future. Enrollment in this plan is generally for the entire year. Once I enroll, I may leave this plan or make changes only at certain times of the year when an enrollment period is available (Example: October 15 - December 7 of every year), or under certain special circumstances.

Related links

- [Summary of Benefits](#)
- [Resumen de Beneficios \(Español\)](#)
- [Formulary](#)
- [Formulario \(Español\)](#)
- [Prior Authorization Information](#)
- [Step Therapy Information](#)
- [Evidence of Coverage](#)
- [Evidencia de Cobertura \(Español\)](#)
- [Low Income Subsidy Information](#)
- [Subsidio de Bajos Ingresos \(Español\)](#)
- [Order Information Kit](#)
- [Solicite un Kit de información \(Español\)](#)
- [Star Ratings](#)
- [Clasificación Por Estrellas \(Español\)](#)

Print

Aetna Medicare Assure Plan (HMO D-SNP)	\$25.70 premium
--	-----------------

Please review the application details below to verify accuracy. If updates are needed, use the **Edit** button to make changes. To submit your application, simply click the **Apply Now** button. If your web browser is closed prior to clicking **Apply Now**, the application will not be submitted.

Edit

Annual election period (AEP) AEP
Requested Effective Date: 01/01/2021

Edit

First name JOHN
Last name TESTER
Gender: Male
Birthdate: 04/19/1931

Edit

Address 1: 00-00 148th St
City: Queens
State: NY
Zip: 10472
County: Bronx

Edit

Primary care provider ID (PCP ID): 1922015171
 Provider first name: Luis Euripides
 Provider last name: Guerrero
 Current patient: No

Edit

Medicare Number: 0W00PR0TE01

Edit

1. Will you have other prescription drug coverage in addition to Aetna plan? *No*
2. Are you a resident in a long-term care facility, such as a nursing home? *No*
3. Are you enrolled in your state's Medicaid program? *No*
4. Have you had creditable coverage since you became eligible for Medicare prescription drug coverage?
No
- Large print** *LargePrint*

Edit

None Selected

Edit

None Selected

Edit

Guerrero, Luis Euripides

Is Eligible for Extra Help? No

Edit

I am the person listed on this enrollment form or I am simply helping to complete this enrollment form.

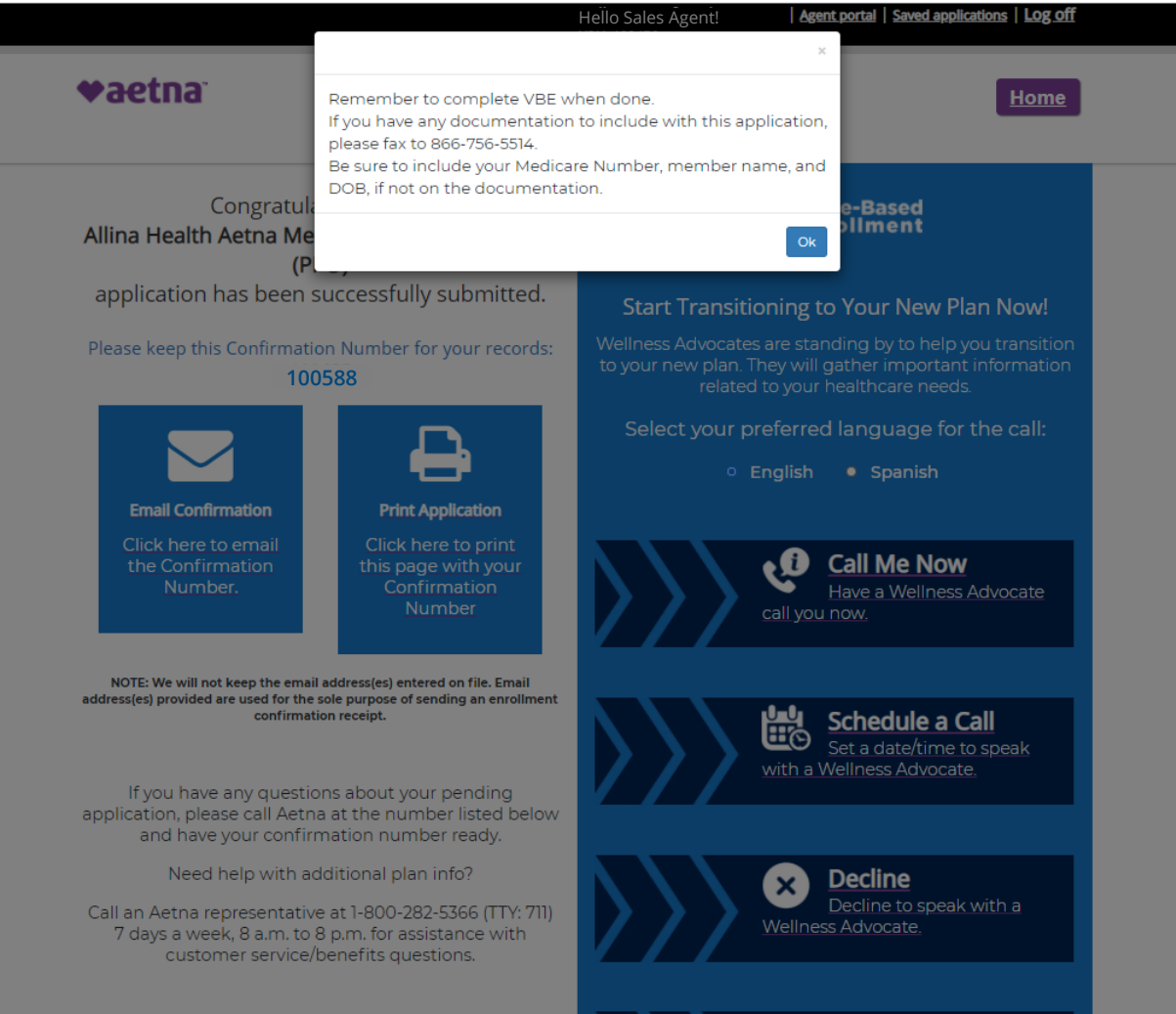
By clicking the "Apply now" button below you are confirming that everything in this application is true and correct to the best of your knowledge. Anyone giving false or misleading statements about a material fact in this electronic application, or causes someone else to do so, may face penalties under the law. By clicking "Apply now" you are also electronically signing your completed application and submitting this to the plan. You will no longer be able to change your information once you submit. Once you submit your enrollment application you will be enrolled in this plan (if approved by CMS) and you will receive notice of acceptance or denial following submission of the enrollment to CMS.

Apply now

Need help with additional plan info?

Call an Aetna representative at **1-800-282-5366 (TTY: 711)**, 7 days a week, 8 a.m. to 8 p.m. for assistance with customer service/benefits questions.

Read the pop-up reminder, then click “Ok”



The Enrollment Confirmation and VBE Initiation Section

Take note of the enrollment confirmation number

The agent and client will automatically receive an email. Agent may send the enrollment confirmation to their client by clicking 'Email Confirmation'

Agent can also print the confirmation by clicking 'Print Application'

The screenshot shows the Aetna website interface for Medicare Value Plus Plan (HMO) enrollment. At the top, the Aetna logo and a 'Home' button are visible. The main heading reads 'Congratulations! Your Aetna Medicare Value Plus Plan (HMO) application has been successfully submitted.' Below this, it states 'Please keep this Confirmation Number for your records: 100588'. There are two buttons: 'Email Confirmation' (with an envelope icon) and 'Print Application' (with a printer icon). A note below these buttons states: 'NOTE: We will not keep the email address(es) entered on file. Email address(es) provided are used for the sole purpose of sending an enrollment confirmation receipt.' Further down, it says 'If you have any questions about your pending application, please call Aetna at the number listed below and have your confirmation number ready.' and 'Need help with additional plan info? Call an Aetna representative at 1-800-282-5366 (TTY: 711) 7 days a week, 8 a.m. to 8 p.m. for assistance with customer service/benefits questions.' The right side of the page is a blue section titled 'Value-Based Enrollment' with the heading 'Start Transitioning to Your New Plan Now!'. It mentions 'Wellness Advocates are standing by to help you transition to your new plan. They will gather important information related to your healthcare needs.' and asks to 'Select your preferred language for the call:' with radio buttons for 'English' and 'Spanish'. Below this are three options: 'Call Me Now' (Have a Wellness Advocate call you now), 'Schedule a Call' (Set a date/time to speak with a Wellness Advocate), and 'Decline' (Decline to speak with a Wellness Advocate).

Home

♥aetna™

Congratulations! Your
Aetna Medicare Value Plus Plan (HMO)
application has been successfully submitted.

Please keep this Confirmation Number for your records:
100588

Email Confirmation
Click here to email the Confirmation Number.

Print Application
Click here to print this page with your Confirmation Number

NOTE: We will not keep the email address(es) entered on file. Email address(es) provided are used for the sole purpose of sending an enrollment confirmation receipt.

If you have any questions about your pending application, please call Aetna at the number listed below and have your confirmation number ready.

Need help with additional plan info?
Call an Aetna representative at 1-800-282-5366 (TTY: 711) 7 days a week, 8 a.m. to 8 p.m. for assistance with customer service/benefits questions.

Value-Based Enrollment

Start Transitioning to Your New Plan Now!
Wellness Advocates are standing by to help you transition to your new plan. They will gather important information related to your healthcare needs.

Select your preferred language for the call:
☐ English ☒ Spanish

Call Me Now
Have a Wellness Advocate call you now.

Schedule a Call
Set a date/time to speak with a Wellness Advocate.

Decline
Decline to speak with a Wellness Advocate.

Your client will be able to select their preferred language. For languages (other than Spanish), you may select 'English'. Advise your client once they are with a wellness advocate that they can request to talk with someone who speaks their preferred language.

Explain the importance of VBE during your meeting with your client and the options available. Clients may opt to select, "Call Now", "Schedule a Call" or "Decline"

Launch a VBE option, then enter necessary information and save

The screenshot shows the 'Schedule a callback' form on the Aetna website. The form is titled 'Schedule a callback' and includes a close button (X). Below the title, it says 'Provide the following information and you will receive a callback:'. The form has four main input fields: 'Date' (07/17/2020), 'Time zone' (Pacific Standard Time), 'Preferred time to contact' (08 AM - 09 AM), and 'Phone Number to call' (Enter your number). A 'Save' button is at the bottom left of the form. Three callouts are present: 1. 'Enter preferred date' pointing to the Date field. 2. 'Select time zone' pointing to the Time zone dropdown. 4. 'Enter phone number' pointing to the Phone Number to call field.

Client will be on queue and the call with the wellness advocate will take place as scheduled


This screenshot shows the 'Schedule a callback' form with the 'Preferred time to contact' dropdown menu open, displaying a list of time slots from 05 AM - 06 AM to 04 PM - 05 PM. A callout 3. 'Select a time' points to the dropdown menu. The 'Save' button is visible at the bottom left of the form.

The Email Confirmation of Application Successfully Submitted

Email from Aetna <donotreply@confirmations.isf.io>

Confirmation of Application

Inbox x



Aetna

<donotreply@confirmations.isf.io>

to me

Mon, May 18, 11:14 AM

☆

↶

⋮

Congratulations! Your Aetna Medicare Premier (HMO) application has been successfully submitted.

Member Name: Neal Echols

Please keep this Confirmation Number for your records: 100588

NOTE: We will not keep the email address(es) entered on file. Email address(es) provided are used for the sole purpose of sending an enrollment confirmation receipt.

If you have any questions about your pending application, please call Aetna at the number listed below and have your confirmation number ready.

Need help with additional plan info?

Call an Aetna representative at 1-800-282-5366 (TTY: 711) 7 days a week, 8 a.m. to 8 p.m. for assistance with customer service/benefits questions.

↶ Reply

➡ Forward





Value-based enrollment (VBE)

Quick overview of the VBE option available through the Aetna's Ascend Virtual Sales Office app

What is VBE?

With the value-based enrollment option available through the Ascend Virtual Sales Office app, your clients will have an opportunity to complete a health-related survey.

This can help them get a head start on their path to better health



Why is it beneficial for us to connect with our new members sooner?



Better understanding

We get a better understanding of members' needs and they get a better understanding of their new plan



Better decisions

VBE helps members identify risks, and learn about immediate benefits of using their new plan



Better health care experiences

We can provide a better overall onboarding experience for new members



At your service

VBE helps prepare new members for what comes next, and informs them about Aetna resources they can use as soon as their plan becomes effective

**What questions are asked
during the VBE survey?**

The survey covers...

General info

For example, the survey asks questions about:

- **Contact information** - Good contact information will help Aetna reach members with a welcome call and get them connected with the right resources.
- **Language preference, race and ethnicity** so we can develop programs that address unmet health care needs.

However, members don't have to answer any questions they don't want to.

Health-related questions

(sample questions)

- Have you ever been told you have some common chronic conditions, such as breathing problems like chronic obstructive pulmonary disease or asthma, high blood pressure, or diabetes?
- In the past 12 months, have you stayed overnight one or more times as a patient in the hospital?
- Do you have problems with balance or walking?
- Does your health limit you in climbing a flight of stairs?

The survey covers... (cont.)

What happens next

Your client will learn what to expect when their plan becomes effective. For example, they'll get information about:

- *An annual home visit from a nurse practitioner* who will spend an hour of quality time with the member in their home, complete a general wellness exam, review their medicines and answer their health-related questions.
- *What they will receive in the mail*, such as the Continuity of Care form. They will be asked to fill out the form if they have an immediate care needs when their membership becomes effective.

How to initiate a VBE?

Complete the online enrollment application

Online application

Aetna Medicare Value Plus Plan (HMO)

\$22.00 premium

Users typically take 18 to 25 minutes to complete enrollment. To speed up the process, please have your Medicare card handy. Simply select the "Next" button to move on to the next step. If you need help or would like to complete your enrollment over the phone, please call a licensed insurance agent at the provided above.

[Plan details](#)

[Back to shopping](#)

[Election Period](#) [Personal Information](#) [Address](#) [Provider Lookup](#) [Insurance Information](#) [Payment](#) [Important Questions](#) [Submit](#)

Please Read This Important Information

The following disclosures describe our health benefits and health insurance plans and how they work. It's important for you to read them before you submit your enrollment form. Check the box to confirm you have read all the disclosures.

If you currently have health coverage from an employer or union, joining the Aetna Medicare Advantage plan could affect your employer or union health benefits. You could lose your employer or union health coverage if you join the Aetna Medicare Advantage plan. Read the communications your employer or union sends you. If you have questions, visit their website, or contact the office listed in their communications. If there isn't any information on whom to contact, your benefits administrator or the office that answers questions about your coverage can help.

The Aetna Medicare Advantage plan is a Medicare Advantage plan and has a contract with the Federal government. I will need to keep my Medicare Parts A and B, and continue to pay my Part B premium. I can only be in one Medicare Advantage plan at a time, and I understand that my enrollment in this plan will automatically end my enrollment in another Medicare health plan or prescription drug plan. It is my responsibility to inform you of any prescription drug coverage that I have or may get in the future. (For MA-only plans) I understand that if I don't have Medicare prescription drug coverage, or creditable prescription drug coverage (as good as Medicare's), I may have to pay a late enrollment penalty if I enroll in Medicare prescription drug coverage in the future. Enrollment in this plan is generally for the entire year. Once I enroll, I may leave this plan or make changes only at certain times of the year when an enrollment period is available (Example: October 15 - December 7 of every year), or under certain special circumstances.

The Aetna Medicare Advantage plan serves a specific service area. If I move out of the area that the Aetna Medicare Advantage plan serves, I need to notify the plan so I can disenroll and find a new plan in my new area. Once I am a member of the Aetna Medicare Advantage plan, I have the right to appeal plan decisions about payment or services if I disagree. I will read the Evidence of Coverage document from the Aetna Medicare Advantage plan when I get it to know which rules I must follow to get coverage with this Medicare Advantage plan. I understand that people with Medicare aren't usually covered under Medicare while out of the country except for limited coverage near the U.S. border.

(For HMO plans) I understand that beginning on the date the Aetna Medicare Advantage plan coverage begins, I must get all of my health care from the Aetna Medicare Advantage plan, except for emergency or urgently-needed services or out-of-area dialysis services.

Related links

[Summary of Benefits](#)

[Formulary](#)

[Prior Authorization](#)

[Information](#)

[Step Therapy](#)

[Information](#)

[Evidence of Coverage](#)

[Low Income Subsidy](#)

[Information](#)

[Order Information Kit](#)

[Star Ratings](#)

(For PPO plans) I understand that beginning on the date the Aetna Medicare Advantage plan coverage begins, using services in-network can cost less than using services out-of-network, except for emergency or urgently needed services or out-of-area dialysis services. If medically necessary, the Aetna Medicare Advantage plan provides refunds for all covered benefits, even if I get services out of network. Out-of-network/non-contracted providers are under no obligation to treat Aetna members, except in emergency situations. For a decision about whether we will cover an out-of-network service, we encourage you or your provider to ask us for a pre-service organization determination before you receive the service. Please call our customer service number or see your evidence of coverage for more information, including the cost-sharing that applies to out-of-network services.

Services authorized by the Aetna Medicare Advantage plan and other services contained in my Aetna Medicare Advantage plan evidence of coverage document (also known as a member contract or subscriber agreement) will be covered. **Without authorization, neither Medicare nor the Aetna Medicare Advantage plan will pay for the services.**

I understand that if I am getting assistance from a sales agent, broker, or other individual employed by or contracted with the Aetna Medicare Advantage plan, he/she may be paid based on my enrollment in the Aetna Medicare Advantage plan.

Release of information:

By joining this Medicare health plan, I acknowledge that the Aetna Medicare Advantage plan will release my information to Medicare and other plans as is necessary for treatment, payment and health care operations. I also acknowledge that the Aetna Medicare Advantage plan will release my information, (including my prescription drug event data), to Medicare, who may release it for research and other purposes which follow all applicable federal statutes and regulations. The information on this enrollment form is correct to the best of my knowledge. I understand that if I intentionally provide false information on this form, I will be disenrolled from the plan.

I understand that my signature (or the signature of the person authorized to act on my behalf under the laws of the state where I live) on this application means that I have read and understand the contents of this application. If signed by an authorized individual (as described above), this signature certifies that 1) this person is authorized under State law to complete this enrollment and 2) documentation of this authority is available upon request from Medicare.

Aetna Medicare is a PDP, HMO, PPO plan with a Medicare contract. Our SNPs also have contracts with state Medicaid programs. Enrollment in our plans depends on contract renewal. See evidence of coverage for a complete description of plan benefits, exclusions, limitations and conditions of coverage. Plan features and availability may vary by service area. This information is not a complete description of benefits. Contact the plan for more information. Limitations, copayments and restrictions may apply. Benefits, formulary, pharmacy network, provider network, premium and/or copayments/coinsurance may change on January 1 of each year.

Please select the statement below that best describes your relationship to the person with Medicare listed on this enrollment form: *

☒ I am the person listed on this enrollment form or I am simply helping to complete this enrollment form.

☐ I am the person authorized to act on behalf of the individual listed on this enrollment form under the laws of the state where the individual resides.

You will be able to review the application before submission on the next page.

* Required information

[Back](#)

[Next](#)

[Save](#)

[Send for Signature](#)

Hello Sales Agent!
NPN: 123456

[Agent portal](#) | [Saved applications](#) | [Log off](#)

[Agent portal](#) | [Saved applications](#) | [Log off](#)



[Home](#)

[Print](#)

Aetna Medicare Value Plus Plan (HMO) **\$22.00** premium

Apply now


▼ Election Period [Edit](#)

▼ Personal Information [Edit](#)

▼ Address [Edit](#)

▼ Provider Lookup [Edit](#)

▼ Insurance Information [Edit](#)

[Edit](#)[Edit](#)

Edit

Edit

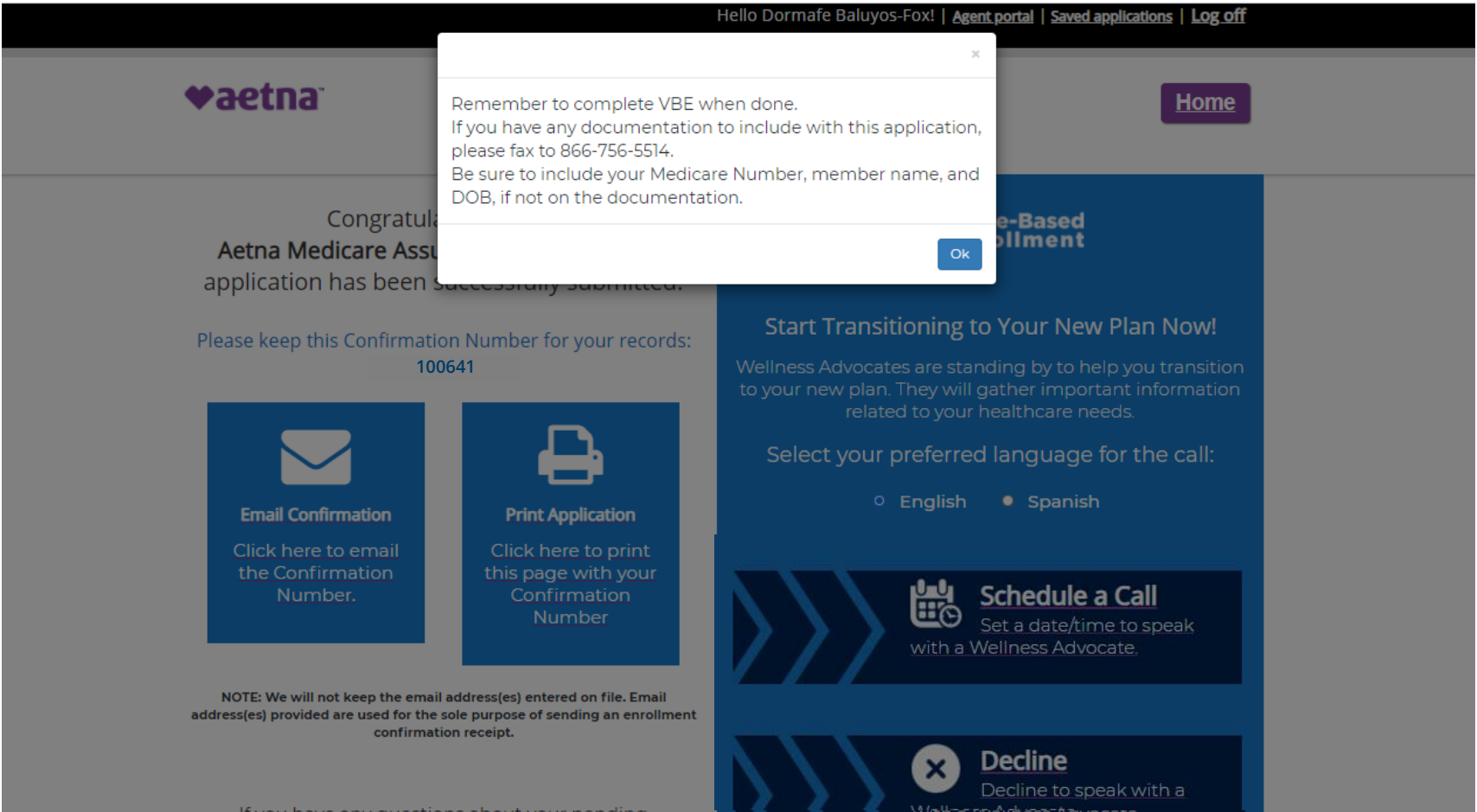
[Edit](#)[Edit](#)

By clicking the "Apply now" button below you are confirming that everything in this application is true and correct to the best of your knowledge. Anyone giving false or misleading statements about a material fact in this electronic application, or causes someone else to do so, may face penalties under the law. By clicking "Apply now" you are also electronically signing your completed application and submitting this to the plan. You will no longer be able to change your information once you submit. Once you submit your enrollment application you will be enrolled in this plan (if approved by CMS) and you will receive notice of acceptance or denial following submission of the enrollment to CMS.

Apply now

Call an Aetna representative at 1-800-282-5366 (TTY: 711), 7 days a week, 8 a.m. to 8 p.m. for assistance with customer service/benefits questions.

Read the pop-up reminder, then click “Ok”



The enrollment confirmation & VBE initiation section

♥ aetna™ [Home](#)

Congratulations! Your **Aetna Medicare Value Plus Plan (HMO)** application has been successfully submitted.

Please keep this Confirmation Number for your records:
100641

Email Confirmation
Click here to email the Confirmation Number.

Print Application
Click here to print this page with your Confirmation Number.

NOTE: We will not keep the email address(es) entered on file. Email address(es) provided are used for the sole purpose of sending an enrollment confirmation receipt.

If you have any questions about your pending application, please call Aetna at the number listed below and have your confirmation number ready.

Need help with additional plan info?

Call an Aetna representative at 1-800-282-5366 (TTY: 711) 7 days a week, 8 a.m. to 8 p.m. for assistance with customer service/benefits questions.

Value-Based Enrollment

Start Transitioning to Your New Plan Now!
Wellness Advocates are standing by to help you transition to your new plan. They will gather important information related to your healthcare needs.

Select your preferred language for the call:
☐ English ☒ Spanish

Schedule a Call
Set a date/time to speak with a Wellness Advocate.

Decline
Decline to speak with a Wellness Advocate.

Agent Complete
Have your agent complete it online with you now.

Next

- Read the VBE script located in your Ascend VSO 'resources' link
- Proceed as stated in the script
- The script helps you invite your client to participate in VBE and then determine which option would work best

Excerpt from the script

Aetna takes a total approach to health. This means not only taking care of our members when they are sick but helping them reach their health goals as well. **To help us guide you on your path to better health, we recommend you take our health-related survey.** The survey will help our clinical and care team understand

By doing this, you are taking the first step in getting your health under control and avoiding bigger problems. We can also help you participate in programs, such as

This will take about 15-20 minutes to complete and will not impact or affect your Medicare eligibility or plan costs.

Would you like to complete the health survey with me today?

... Would you like to complete the health survey with me today?

Value-Based Enrollment

Start Transitioning to Your New Plan Now!

Wellness Advocates are standing by to help you transition to your new plan. They will gather important information related to your healthcare needs.

Select your preferred language for the call:

☐ English ☒ Spanish

Schedule a Call
Set a date/time to speak with a Wellness Advocate.

Decline
Decline to speak with a Wellness Advocate.

Agent Complete
Have your agent complete the survey online with you now.

If meeting with client in person and client says YES, proceed to launch the “Agent Complete” VBE option.

If enrolling through the RATE process and your client says YES, please ask: *In addition, you understand and agree to this conversation being recorded. Do you want to continue?*

If YES, launch the “Agent Complete” option.

If your client says NO, say: *Would you like to speak with a wellness advocate to complete the health survey at another time that is convenient for you?*

If YES, select the “Schedule a Call” VBE option.

A few considerations before offering the “Agent Complete” option

- A. Is your customer someone you see often in social gatherings, events or activities (such as gyms, yoga class or reading clubs)?
- B. Are you comfortable asking the health related questions to your customers?
- C. Is your customer willing to spend another 10-15 minutes of their time with you after their enrollment is submitted?
- D. Do you speak fluently your customers preferred language other than English?



If the answer is “yes” to questions A and B, and “no” to questions C and D, please offer the **“Schedule a Call”** option instead.

Considerations for the “Schedule a Call” option

Keep in mind:

- You can select to “Schedule a Call” based on your client’s time zone.
- If your client misses the VBE call, the wellness advocate will leave a message and a callback number.
- They will attempt to callback up to 8 times.
- You may provide the callback number to your clients to keep, especially if they haven’t set-up their voicemail.

VBE hours of operation



Oct 1, 2020 – Mar 31, 2021:

8am to 11pm ET, 7 days a week

- English VBE Wellness Callback numbers
➤ (833) 923-1469 or (833) 923-1470
- Spanish VBE Wellness Callback numbers
➤ (833) 923-1651 or (833) 923-1680

Apr 1, 2021 – Sep 30, 2021:

8am to 8pm ET, Monday – Friday

What to expect with the “Agent Complete” option

After selecting the “Agent Complete” option, you’ll need to complete the health-related survey questionnaire with your client



Home

Print

[Back to VBE search](#)

Health Risk Assessment - Add

Aetna - Health Risk Assessment

1. To start, may I please confirm the telephone number you entered in your enrollment application?:

Enter the phone number:

(If the customer says the 'didn't give the number', read this)

We ask for this information so that, when your coverage starts, we can contact you to offer you extra support in certain situations. For example, if you were hospitalized, you might get a call from a nurse case manager to answer questions about your medications and discharge instructions and help you access the services you need. You might also get a call from us to tell you about some of your plan benefits. Would you reconsider p
(Ask question 2 & 3 if applicable)

2. Is this number a landline or a cell phone? :

3. Would you be able to provide a cell phone:

Enter the cell phone number:

4. Do you have an email address that you can provide?:

Next, I have a few questions about your experience with Medicare.

5. Is this the first time you are getting your health insurance through Medicare? :

(If no, proceed to question 6. If yes, select 'not applicable' then proceed to question 7

6. Is this the first time you are enrolling in a Medicare Advantage plan to get your Medicare benefits?:

The next few questions relate to race, ethnicity, and veteran status. We ask for this information so that we can understand the demographics of our population and develop programs and resources to meet our members' needs.

7. Are you of Hispanic or Latino origin or descent?:

8. Which of the following describes your race? (Read choices to member) :

9. Is English your preferred language? :

10. If not, what language would you prefer that we use when we communicate with you?:

If you ever need to speak with a Member Services representative or one of our clinical staff, they have a language line they can use to communicate with you in over 200 languages. We send some of our written communications in Spanish, and you can call to ask us to send you a specific written communication in other commonly spoken languages and alternate formats such as audio, large print, or braille.

11. Are you a veteran or currently serving in the military?:

(If the answer is Veteran or Currently serving in the military, proceed to 12. If neither, select "not applicable" then proceed to question 13)

12. Do you receive care from Veterans Affairs (VA)? :

Which VA facility (Location)? :

Next, I have some questions about your health that may help us to identify care programs and resources that may benefit you. I want to emphasize that any information you give me today will not affect your enrollment into or how much you pay for your plan. You don't need to answer any questions you don't want to.

(Pause)

Now, let's get started.

13. In general, how would you rate your health? :

14. Now I'm going to ask if you've ever been told you have some common chronic conditions. Have you ever been told you have:

Breathing problems like chronic obstructive pulmonary disease or asthma? :

Congestive heart failure? :

High blood pressure? :

Chronic kidney disease? :

Major depression? :

Diabetes? :

Cancer? :

15. Have you had a colonoscopy in the last 9 years? This is a procedure to screen for colon cancer. (If the member says "yes" ask where the procedure was done) :

Location where procedure was done:

16. In the past 12 months, have you stayed overnight one or more times as a patient in the hospital?:

17. In the past 6 months, have you been to the emergency room 3 or more times? :

18. Does your health limit you in moderate activities such as moving a table, pushing a vacuum, bowling, or playing golf? The answer choices are:

19. Does your health limit you in climbing a flight of stairs?:

20. Do you have problems with balance or walking? :



After completing the questionnaire with your client, read the closing statement

21. The next questions are about whether you need help with certain day-to-day living activities.

a. Walking?:

b. Do you need help bathing?:

c. Eating?:

d. Using the bathroom?:

e. Getting dressed?:

22. Have you had a fall in the past 6 months?:

23. In the past 12 months, did you talk with your doctor or other health provider talk with you about how to prevent falls?:

Thank you. I have just a few more questions.

24. During the past 4 weeks, how much did pain interfere with your normal work, including both work outside the home and housework?:

25. During the past 4 weeks, how often have you felt downhearted or blue?:

26. And the last question: during the past 4 weeks, how much of the time has poor physical health or emotional problems interfered with your social activities like visiting or talking with friends and relatives?:

... And then click "Submit"

Need help with additional plan info?

Disclaimer of warranties and liabilities

Aetna Medicare is a HMO, PPO plan with a Medicare contract. Our SNPs also have contracts with State Medicaid programs. Enrollment in our plans depends on contract renewal.

Every year, Medicare evaluates plans based on a 5-star rating system.

For a complete list of available plans please contact 1-800-MEDICARE (TTY users should call 1-877-486-2048). 24 hours a day/7 days a week or consult www.medicare.gov.

For mail-order, you can get prescription drugs shipped to your home through the network mail-order delivery program. Typically, mail-order drugs arrive within [x] days. You can call [phone number/TTY/hours of op] if you do not receive your mail-order drugs within this timeframe. [Members may have the option to sign-up for automated mail-order delivery.]

Thank you very much for taking the time to answer my questions. Before I go, I'd like to tell you about just a few resources available to you as part of your plan and what you can expect next.

We are very excited to offer you the Healthy Home Visit. This program is a way for you to maintain your overall health in the comfort of your own home. This program is offered annually at no extra cost to you. It is not intended to take the place of your primary care physical or your annual wellness visit. Instead, it helps us work with your primary care physician (PCP) to manage your care. It can direct you to the health programs and services you may need.

Here's what you can expect from the Healthy Home Visit.

A clinical licensed nurse practitioner or board-certified doctor will visit you in your home. During this visit, you'll be able to ask any health-related questions you may have. You'll receive a non-invasive physical exam, and recommendations for health resources/screenings you may need. In addition, the nurse practitioner or doctor will review your medicines and dosages. You can also get this visit completed virtually. A virtual appointment requires you have audio/visual smart technology.

Please be sure to also visit our website at:

<Aetna: aetnamedicare.com>

<Innovation Health: InnovationHealthMedicare.com>

<Allina Health | Aetna: allinahealthaetnamedicare.com>

It contains a wealth of information about Medicare and can help you to find providers. We have also added a special section on the coronavirus-COVID-19. If you register on the website, you will be able to:

- Access your claims information

Once we confirm your enrollment, you'll get a Continuity of Care Form. This form helps us know if you'll have remaining, immediate care needs when your new plan starts. For example, if you have a surgery scheduled near the date your new plan starts. If this is the case, you should return the form to us. You should return this form if you answer "Yes" to any question on the form.

If you have any questions about your plan, please don't hesitate to reach out to me as your enrolling agent. After you receive your member ID, you may reach out to Member Services at:

<Aetna: 1-833-570-6670 (TTY 711)>

<Innovation Health: 1-855-249-1282 (TTY:711)>

<Allina Health | Aetna: 1-833-570-6671 (TTY: 711)>

Again, we want to thank you for being a member with

<Aetna> <Innovation Health> <Allina Health | Aetna>

Goodbye and have a nice day!

Review the summary

[Home](#)[Print](#)

Summary

Please review the below responses for accuracy. If changes are needed, click Edit Form and if no changes are needed click Submit.

Aetna - Health Risk Assessment

1. To start, may I please confirm the telephone number you entered in your enrollment application?	Yes
2. Is this number a landline or a cell phone?	Cell Phone
3. Would you be able to provide a cell phone	Yes
Enter the cell phone number	732-123-8967
4. Do you have an email address that you can provide?	dmedlar@yahoo.com
5. Is this the first time you are getting your health insurance through Medicare?	Yes
6. Is this the first time you are enrolling in a Medicare Advantage plan to get your Medicare benefits?	Yes
7. Are you of Hispanic or Latino origin or descent?	No, not Hispanic or Latino
8. Which of the following describes your race? (Read choices to member)	White
9. Is English your preferred language?	Yes
11. Are you a veteran or currently serving in the military?	Neither
12. Do you receive care from Veterans Affairs (VA)?	Not applicable
13. In general, how would you rate your health?	Very Good
Breathing problems like chronic obstructive pulmonary disease or asthma?	No
Congestive heart failure?	No
High blood pressure?	No
Chronic kidney disease?	No
Major depression?	No
Diabetes?	No
Cancer?	No

15. Have you had a colonoscopy in the last 9 years? This is a procedure to screen for colon cancer. (If the member says "yes" ask where the procedure was done)	No	
16. In the past 12 months, have you stayed overnight one or more times as a patient in the hospital?	Yes	
17. In the past 6 months, have you been to the emergency room 3 or more times?	Yes	
18. Does your health limit you in moderate activities such as moving a table, pushing a vacuum, bowling, or playing golf? The answer choices are	Limited a little	
19. Does your health limit you in climbing a flight of stairs?	Limited a little	
20. Do you have problems with balance or walking?	Not sure/other	
a. Walking?	No	
b. Do you need help bathing?	Yes	
c. Eating?	Yes	
d. Using the bathroom?	No	
e. Getting dressed?	Yes	
	No	
	but how to	I have not had a visit in the past 12 months
	work outside	A little bit
25. During the past 4 weeks, how often have you felt downhearted or blue?	All of the time	
26. And the last question: during the past 4 weeks, how much of the time has poor physical health or emotional problems interfered with your social activities like visiting or talking with friends and relatives?	Most of the time	

If complete, click "Submit." Or click "Edit" if a response is missing.


[Submit](#) [Edit Form](#)

Need help with additional plan info?

Confirmation of health survey submission

Hello Sales Agent!
NPN: 123456

[Agent portal](#) | [Saved applications](#) | [Log off](#)



Home

Print

HRA confirmation

Congratulations. Your HRA submission has been saved successfully.

Need help with additional plan info?

Back to VBE search

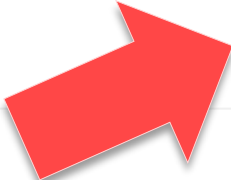
Disclaimer of warranties and liabilities

Aetna Medicare is a HMO, PPO plan with a Medicare contract. Enrollment in our plans depends on contract renewal.

Every year, Medicare evaluates plans based on a 5-star rating.

For a complete list of available plans please contact 1-800-Medicare or consult www.medicare.gov.

For mail-order, you can get prescription drugs shipped to your home through the network mail-order delivery program. Typically, mail-order drugs arrive within 1x1 days. You can call (phone number/TTY/hours of op) if you do not receive your mail-order drugs within this



You can click
“Back to VBE search” to
view the submitted HRA

Record of completed VBE health surveys



Home

Print

Enter value(s) to search for a particular beneficiary

Value Based Enrollment - Search

Confirmation Id

OR

External Id

OR

First Name

Last Name

Phone Number

8888888888

Search

Id	Name	Phone Number	DOB	Election Period	Plan Name	Plan Year	HRA Status	PCP Selected	Enrollment submitted date	Actions
100641	LOIS LANE		August 18, 1959	Annual election period (AEP)	Aetna Medicare Value Plus Plan (HMO)	2021	Complete	No	October 09, 2020	View HRA

You can track the status of VBE you initiated by checking the column HRA Status

Need help with additional plan info?



Email confirmation of submitted enrollment application

The screenshot shows an email client interface with the following elements:

- Top Ribbon:** Includes tabs for File, Home, Send / Receive, Folder, View, Help, Acrobat, and a search bar. The Home tab is active, showing icons for New Email, New Items, Meet Now, Schedule Meeting, Ignore, Clean Up, Delete, Archive, Reply, Reply All, Forward, Meeting, IM, and More.
- Left Sidebar:** Shows Favorites (Inbox: 1926, Deleted Items: 1073, Sent Items) and a folder for PottsP@AETNA.com (Inbox: 1926, Drafts: [547]).
- Search Bar:** Labeled "Search Current Mailbox" with a dropdown menu set to "Current Mailbox".
- Email List:** Shows an email from Aetna with the subject "[EXTERNAL] Here's How You'll Earn Rewards With An Apple Watch" and a warning "**** External Email - Use Caution ****".
- Email Preview:** Displays the email content, which is a confirmation of application for Aetna Medicare Select Plan (HMO) on 10/09/2020 10:15:45. The confirmation number is 100656.

Agent receives an email confirmation of submitted enrollment

[EXTERNAL] Confirmation of Application

Aetna <donotreply@confirmations.isf.io>
To: Potts, Pepper

Follow up. Start by Friday, October 9, 2020. Due by Friday, October 9, 2020.

**** External Email - Use Caution ****

Hello Pepper,

You have successfully submitted an application for Aetna Medicare Select Plan (HMO) on 10/09/2020 10:15:45.


The Confirmation Number is 100656.

Tracking enrollments and VBE payments in the Ascend Agent Portal

To track your submitted enrollments, click the link to “Agent Portal”

Hello Sales Agent!
NPN: 123456

[Agent portal](#) | [Saved applications](#) | [Log off](#)



Home

Tracking

Enrollments

Value Based Enrollments

Quick Quotes

Navigation: First, Prev, Next, Last

Search By Confirmation Id # [Search] [Reset] Select Fields: [Select Some Options] [Select]

Name	Address	Plan	Plan Year	Date	Premium	Confirmation #	Status	VBE Selection
CAROL DANVERS	321 Marvel Avenue, Memphis, Shelby, TN, 38107	Aetna Medicare Value Plus Plan (HMO)	2021	10/08/2020	\$22.00	100641	Submitted	None
LOIS CLARK	1098 Crypton Avenue, Apple Valley, Dakota, MN, 55124	Allina Health Aetna Medicare Discover Premier (PPO)	2021	10/08/2020	\$46.00	100655	Submitted	None


Navigation: First, Prev, Next, Last

Click “Agent Portal”

View a record of completed value-based enrollments

Hello Sales Agent!
NPN: 123456

[Agent portal](#) | [Saved applications](#) | [Log off](#)



Home

Click "Agent Portal"

Tracking

Enrollments

Value Based Enrollments

Quick Quotes

◀ First

◀ Prev

Next ▶

Last ▶▶

Search By Confirmation Id #

Search

Reset

Select Fields:

Select Some Options

Select

Name ^	Tracking # <	HRA Last Update <	HRA Status <
CAROL DANVERS	523	10/8/2020 1:33:05 PM	Complete
LOIS CLARK	538	10/8/2020 10:57:57 PM	Complete

◀ First

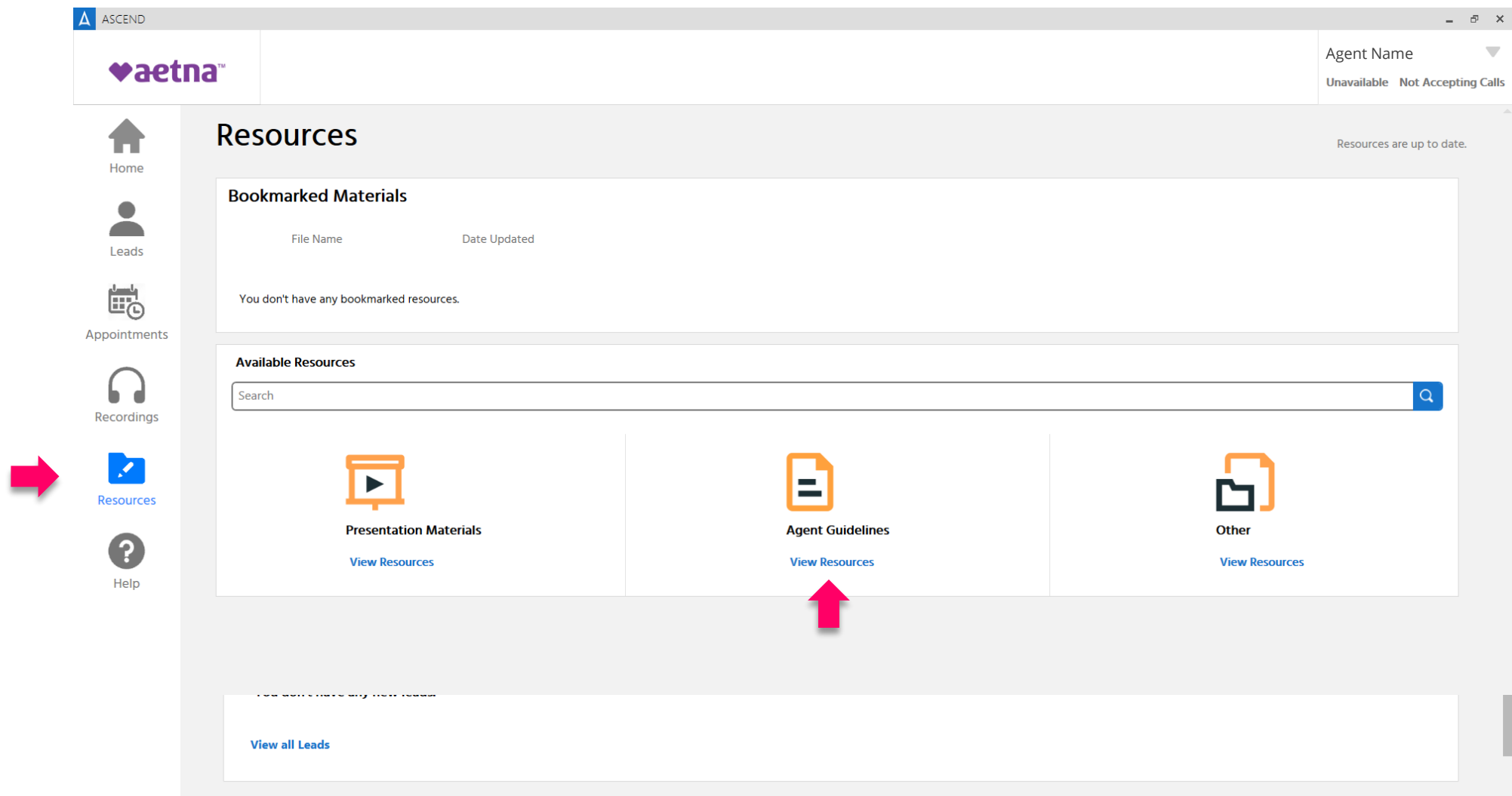
◀ Prev

Next ▶


Last ▶▶

Where to find the VBE Script

In your Ascend VSO App, go to 'Resources'



ASCEND



Dormafe Baluyos-Fox

Unavailable Not Accepting Calls

Home

Leads

Appointments

Recordings










Resources

Help

Resources > > VBE Scripts

VBE Scripts

Resources are up to date.

File Name	Date Updated	
  2021 Aetna VBE Script	Oct 17, 2020	
  2021 Aetna VBE Script - Short Form	Oct 17, 2020	
  2021 DSNP VBE Script	Oct 17, 2020	

Use the script when launching the 'Agent Complete' VBE option with your client

ASCEND

Dormafe Baluyos-Fox
Unavailable Not Accepting Calls

Home

Leads

Appointments

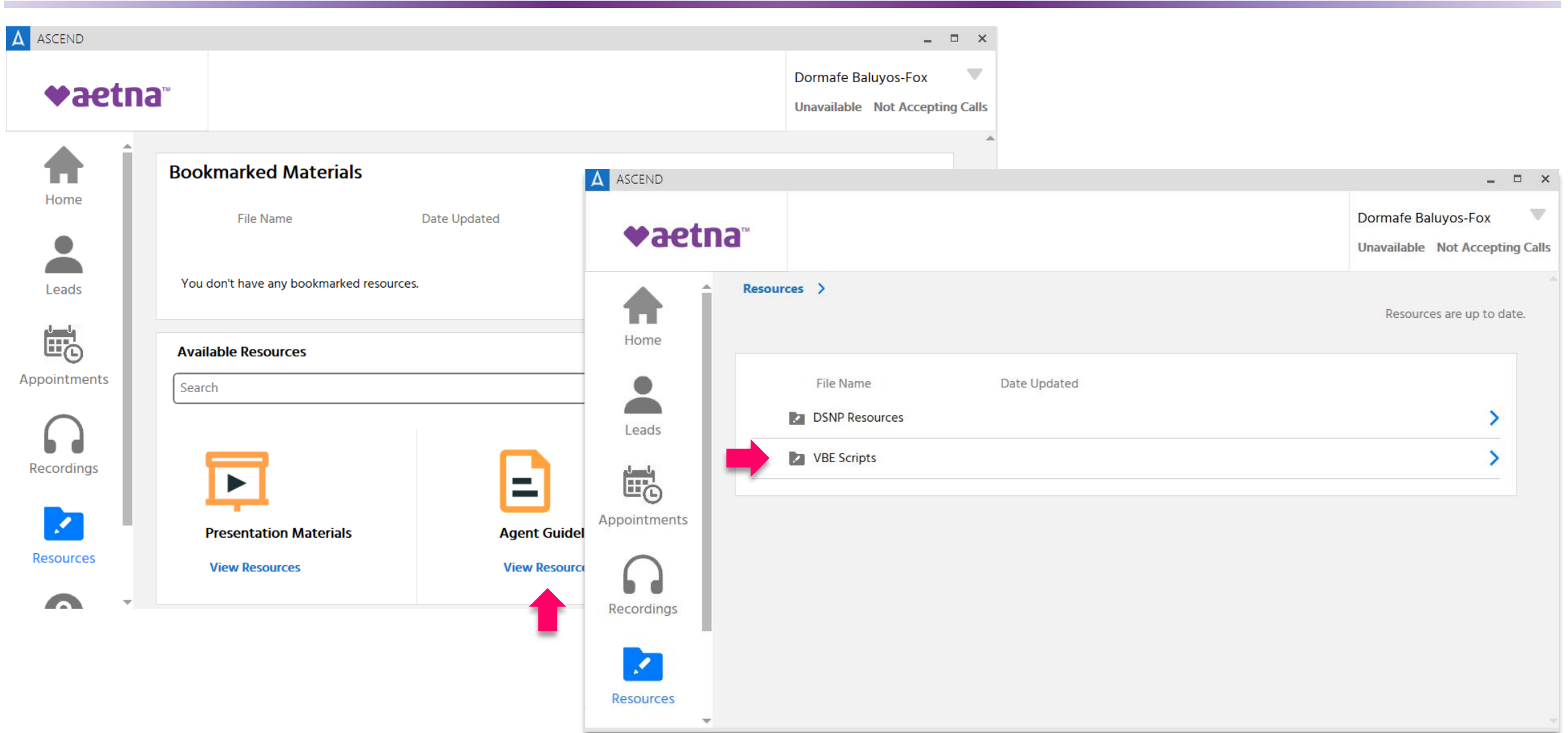
Recordings

Resources

Help

Value Based Enrollment Program
Health Survey

VBE Script	<ul style="list-style-type: none">Audience: New enrollees who participate in Value Based Enrollment (VBE)For use by: Brokers before initiating a VBE option <p>Purpose: Provide opportunity to participate with VBE process to newly enrolled Medicare beneficiaries and gather health related information and identify health care needs.</p> <p>Brokers directions are in <i>italics</i> Brokers verbiage is in bold</p>
Introduction	<p><i>{You will be on the VBE initiation section, after submitting an enrollment application}</i></p> <p>Aetna takes a total approach to health. This means not only taking care of our members when they are sick but helping them reach their health goals as well. To help us guide you on your path to better health, we recommend you take our health-related survey. The survey will help our clinical and care team understand if:</p> <ul style="list-style-type: none">You have any conditions, such as, diabetes, heart problems or high blood pressure.You routinely receive preventive screenings, or have limitations doing moderate activities, such as, pushing a vacuum or moving a table. <p>By doing this, you are taking the first step in getting your health under control and avoiding bigger problems. We can help you participate in programs, such as, the fall prevention program or refer you to additional care management programs as appropriate.</p> <p>This will take about 15-20 minutes to complete and will not impact or affect your Medicare eligibility or plan costs.</p> <p>Would you like to complete the health survey with me today?</p> <p><i>{There is no option to record the conversation if meeting with the beneficiary in person. Ideally, screen view can be shared with the beneficiary. However, COVID-19 social distancing rule should be observed}</i></p> <p><i>{If YES and meeting with client in person, proceed to launch the "Agent Complete" VBE option, the appropriate Health Survey will automatically display depending on</i></p>



ASCEND

Home

Leads

Appointments

Recordings

Resources

Resources > VBE Scripts

VBE Scripts

File Name	Date Updated
☆ 2021 Aetna VBE Script	Oct 17, 2020
☆ 2021 Aetna VBE Script - Short Form	Oct 17, 2020
☆ 2021 DSNP VBE Script	Oct 17, 2020

Home

Leads

Appointments

Recordings

Resources

Help

ASCEND

Home

Leads

Appointments

Recordings

Resources

Help

Resources > VBE Scripts

VBE Scripts

File Name	Date Updated
☆ 2021 Aetna VBE Script	Oct 17, 2020
☆ 2021 Aetna VBE Script - Short Form	Oct 17, 2020
☆ 2021 DSNP VBE Script	Oct 17, 2020

Home

Leads

Appointments

Recordings

Resources

Help

Value Based Enrollment Program Health Survey

VBE Script	<ul style="list-style-type: none"> Audience: New enrollees who participate in Value Based Enrollment (VBE) For use by: Brokers before initiating a VBE option <p>Purpose: Provide opportunity to participate with VBE process to newly enrolled Medicare beneficiaries and gather health related information and identify health care needs.</p> <p>Brokers directions are in <i>italics</i> Brokers verbiage is in bold</p>
Introduction	<p><i>{You will be on the VBE initiation section, after submitting an enrollment application}</i></p> <p>Aetna takes a total approach to health. This means not only taking care of our members when they are sick but helping them reach their health goals as well. To help us guide you on your path to better health, we recommend you take our health-related survey. The survey will help our clinical and care team understand if:</p> <ul style="list-style-type: none"> You have any conditions, such as, diabetes, heart problems or high blood pressure. You routinely receive preventive screenings, or have limitations doing moderate activities, such as, pushing a vacuum or moving a table. <p>By doing this, you are taking the first step in getting your health under control and avoiding bigger problems. We can help you participate in programs, such as, the fall prevention program or refer you to additional care management programs as appropriate.</p>





Ascend

Ascend Virtual Sales Office (VSO) App & Value Based Enrollment (VBE) Program

A User Guide & Training Series



Full list of Ascend Training: This Topic Covers ...

- Getting Started with Ascend
- My Ascend Settings
- Adding a Lead
- Electronic Scope of Appointment (eSOA)
- Ascend Virtual Meeting – Video
- Year Over Year Plan Change Tool
- Email a Quote (eKit)
- Pre-Filled Application and Digital Signature
- Blue Button
- Pharmacy Search
- Formulary Search
- Doctor Search
- **Extra Help Eligibility**
- Enroll a Prospect
- Initiating a Value Based Enrollment (VBE)
- The Agent Portal
- My Book of Business
- VBE Service Fees and Payments
- The Sandbox Mode

What is the Ascend Virtual Sales Office (VSO)?



- Also known as the Ascend Mobile Application (AMA), or simply the Ascend app.
- It is a modular system with many functions designed to assist sales agents with:
 - Electronic scope appointment (eSOA)
 - Audio recording capabilities of your sales meetings
 - Remote Agent Telephonic Enrollment (RATE) capability
 - Electronic application submission

What is the Ascend Quote & Enrollment (AQE) Tool?


- A tool in Ascend that gives you the capability to compare plan info and choose the best plan for your prospect
- Ability to create your member profile with provider info, formulary and pharmacy choices
- Functionality to create and send an eKit, or text or email a Quote to your prospect
- Where you can complete and submit the online enrollment application




Extra Help Eligibility


Log-in to Ascend VSO, and Select the 'Enroll a Prospect' tile


ASCEND





Pepper Potts
Unavailable Not Accepting Calls



Home


Leads


Appointments



Recordings



Resources



Help


Welcome Pepper


What would you like to do today?


 2021 Sales Presentation Videos


 **Enroll A Prospect**


 Year Over Year Plan Change Tool


 Email a Quote


 Email/Text Electronic Scope of Appointment


 Benefits Checkup


 Find A 2019 DRx Enrollment


 Find A 2020 Enrollment


 Find A 2020 SilverScript Enrollment


 Find a 2021 Enrollment

 Find A Client

 Find A Doctor

 My Book of Business


 Record A Meeting

 View Resources

New Leads

Name	Date Modified	Source
You don't have any new leads.		
View all Leads		

Select the appropriate plan year and mode of enrollment




Aetna

What plan year are you enrolling in?

2020 Plans

2021 Plans

2020 Silverscript PDP Plans



Aetna

Is this a telephonic enrollment?

Yes

No


Select 'YES' if enrolling a client using the RATE feature

Select 'NO' if not using RATE to enroll a client

The Ascend Quote and Enrollment Tool

Hello Agent!
NPN: 123456

[Agent portal](#) | [Saved applications](#) | [Admin Portal](#) | [Log off](#)





Plan Year
2021 ▾

Explore plans


Enter your ZIP code below to find plans Aetna offers and review rates.

ZIP code


[View plans](#)



Enter the client's ZIP Code, then click 'View Plans'



Disclaimer of warranties and liabilities


Aetna Medicare is a HMO, PPO plan with a Medicare contract. Our SNPs also have contracts with State Medicaid programs. Enrollment in our plans depends on contract renewal.

Every year, Medicare evaluates plans based on a 5-star rating system.

For a complete list of available plans please contact **1-800-MEDICARE** (TTY users should call **1-877-486-2048**), 24 hours a day/7 days a week or consult www.medicare.gov.

For mail-order, you can get prescription drugs shipped to your home through the network mail-order delivery program. Typically, mail-order drugs arrive within [x] days. You can call [phone number/TTY/hours of op] if you do not receive your mail-order drugs within this timeframe. [Members may have the option to sign-up for automated mail-order delivery.]

Extra Help Eligibility



Plan Year
[Home](#) 2021 ▾

[Print](#)

[Blue Button](#) > [Pharmacy Search](#) > [Formulary Search](#) > [Doctor Search](#) > [Extra Help Eligibility](#)
> [2021 Medicare Plans](#)

Extra Help Eligibility

[Skip](#) [Save & Continue](#)

Extra Help eligibility is dependent on your income. If you qualify, it can help lower the cost of your prescription drug premium and your prescription drugs, too. It also allows you to apply for a new prescription drug plan at certain times throughout the year. To check eligibility status, enter the information below and click the Check button. To skip this check, simply click on Skip next to the Save & Continue button.

☒ Extra Help ☐ Medicaid ☐ Both

First Name

TONY

Last Name

STARK

Date of Birth

10/18/1955

Medicare Number

0Y99YY0AK12

Check


Need help with additional plan info?

Call an Aetna representative at 1-800-282-5366 (TTY: 711). 7 days a week, 8 a.m. to 8 p.m. for assistance with customer service/benefits questions.

Select 'Extra Help Eligibility',
Enter the beneficiary's information in
required fields, then click 'Check'



Extra Help result if eligible for premium subsidy



Home

Plan Year
2021

Print

[Blue Button](#) › [Pharmacy Search](#) › [Formulary Search](#) › [Doctor Search](#) › [Extra Help Eligibility](#) › [2021 Medicare Plans](#)

Extra Help Eligibility

Skip


Save & Continue

You may be eligible for Extra Help. This can reduce the prescription drug premium of the plan you select and will reduce the cost of your prescription drugs. You can contact the Social Security Administration to find out more details about how much this will lower your costs.

Start Date	End Date	Extra Help Category	Premium Subsidy
01/01/2020	12/31/2020	Category 1	100%

Need help with additional plan info?


Call an Aetna representative at 1-800-282-5366 (TTY: 711). 7 days a week, 8 a.m. to 8 p.m. for assistance with customer service/benefits questions.



Premium
adjustment
with Extra Help

Extra Help Eligibility check result

Details for beneficiary who is signed up but showing no current coverage



Home

Plan Year
2021

Print

[Blue Button](#) > [Pharmacy Search](#) > [Formulary Search](#) > [Doctor Search](#) > [Extra Help Eligibility](#) > [2021 Medicare Plans](#)

Extra Help Eligibility

Skip


Save & Continue

Extra Help information was found, but the effective dates (Start Date: **NA** and End Date: **NA**) show there is no current coverage.

Need help with additional plan info?

Call an Aetna representative at 1-800-282-5366 (TTY: 711). 7 days a week, 8 a.m. to 8 p.m. for assistance with customer service/benefits questions.

Details for beneficiary who is not signed up for subsidy



Home

Plan Year
2021

Print

[Blue Button](#) > [Pharmacy Search](#) > [Formulary Search](#) > [Doctor Search](#) > [Extra Help Eligibility](#) > [2021 Medicare Plans](#)

Extra Help Eligibility

Skip

Save & Continue

You are not currently signed up for Extra Help. You can check with the Social Security Administration to see if you would be eligible.

Need help with additional plan info?

Call an Aetna representative at 1-800-282-5366 (TTY: 711). 7 days a week, 8 a.m. to 8 p.m. for assistance with customer service/benefits questions.

How to Apply for Extra Help?

Individuals who are not deemed eligible may apply by contacting:

- SSA (by mail, by telephone, on the Internet at www.ssa.gov, or in person) or
- Their State Medicaid agency

Click to view: [Understanding the Extra Help with Your Medicare Part D Plan](#)

