Unable to meet with a beneficiary in person?
Resources you can use to assist your clients remotely

Options for obtaining a Scope of Appointment

CMS guidance requires you to obtain a completed Scope of Appointment prior to having a one-on-one sales consultation about Medicare Advantage or Medicare Part D plans. There are several different ways you can complete this requirement.

1) **Electronically by email or text**: If you have access to the Ascend Virtual Sales Office app, you can obtain completed Scope of Appointments by email or text. Both options are user- friendly and only require a few clicks to complete. You can encourage your clients to get help from a family member to complete either method, if needed. These Scope of Appointments are automatically maintained in the Ascend app for 10 years to meet the CMS requirement.

2) **Telephonically**: To complete a Scope of Appointment by phone, there are two steps.

   - First, you must request a Scope of Appointment ID by calling 844-334-2247. Follow prompts to verbally provide all the required items on the form. This will generate a Scope of Appointment ID number; *make sure you copy it down*.

   - Next, your client needs to call 844-334-2247, enter the Scope of Appointment ID, and then follow prompts to verify appointment details. (If helpful, you may facilitate a three-way call with your client to support them with completing this step.)

   Telephonic Scope of Appointments are maintained on our servers for 10 years to meet the CMS requirement.

3) **By mail**: You may mail a paper Scope of Appointment form to your client and ask them to sign it and mail it back. You must keep these forms for 10 years to meet CMS requirements.

Options for sending an enrollment kit

During a sales consultation, you must provide a complete enrollment kit to your client and review plan options and benefits. There are several ways you can complete this requirement.

1) **Send an e-kit:** In the Ascend Virtual Sales Office app, click "Send a Quote" to generate an e-kit email to your client. The e-kit contains *all required plan documents* and can take the place of a hard-copy enrollment kit.

2) **By mail:** You can also mail your client a paper enrollment kit. You can order enrollment kits through Producer World.

Options for accepting enrollment applications from your clients

Before accepting an enrollment application, ensure you have followed all CMS rules for completing a compliant sales presentation. Those requirements apply to both in-person or telephonic consultations.

1) **E-kit:** With e-kits, you can email your clients a link that allows them to enroll online – and keep you as their writing agent. E-kits work with any laptop or an iPad, and no special setup or training is required. All you need is access to the Ascend app. In the Ascend app, you'll use the "Send a Quote" feature to initiate an e-kit

email to your clients. Encourage your clients to copy down the enrollment confirmation number that appears at the end of the online enrollment process.

2) **Remote Agent Telephonic Enrollment (RATE)**: With this tool, you can obtain a complete, compliant enrollment entirely by phone. To use RATE, you must have an iPad, and you must have access to the Ascend app. In addition, you must complete an online compliance training and pass a quiz with a score of 90% in two tries or less. Once completed, you'll receive a unique toll-free phone number to use to capture enrollments by phone. Contact your local Aetna Medicare Broker Manager for more information.

3) **By mail**: You can also mail a paper enrollment kit to your client and ask them to complete it and mail it back. The date you receive the completed application in the mail is the application "received date." Enter this date on Page 8, Section 9, of a paper application as the "Date agent received the Individual Enrollment Request Form." Remember, you have two days from the date you take possession of the application to send it in to Aetna. We encourage you to use fax or secure email (available with select plans) to submit these applications; or, with some plans, you can upload applications through Producer World.

4) **Curbside**: As another option, you can deliver an enrollment kit to your client's home and leave it on their doorstep at a prearranged time. After you return to your car, your client can retrieve the enrollment kit and then you can assist them with completing it over the phone (i.e., explain where to sign and date). Once completed, they can leave the application in the sales kit envelope outside their door, and you can pick it up before leaving.

Need access to the Ascend app?

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 either of our 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 to 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.

Stay safe out there!

If you have any questions, please reach out to your local Aetna Medicare broker manager. Or you can contact the Broker Services Department at **1-866-714-9301** or brokersupport@aetna.com.

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