

# Ascend Quick Start



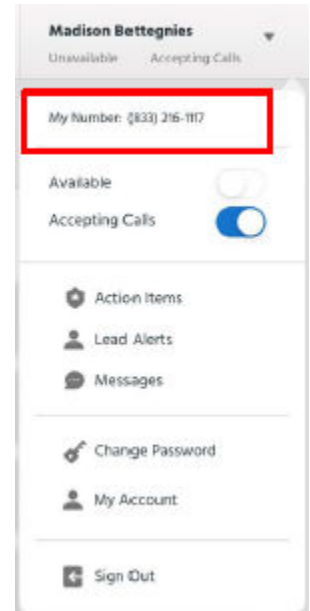
## Ascend RATE

Remote Agent Telephonic Enrollment (RATE) tool within the Ascend Mobile Application (AMA) that enables you to enroll your clients by phone. RATE is available with an iPad, Windows, and Android and uses your device as your phone.

***If you need a RATE number generated, please contact Sales Support or your Sales Leader, not the Ascend help desk.***

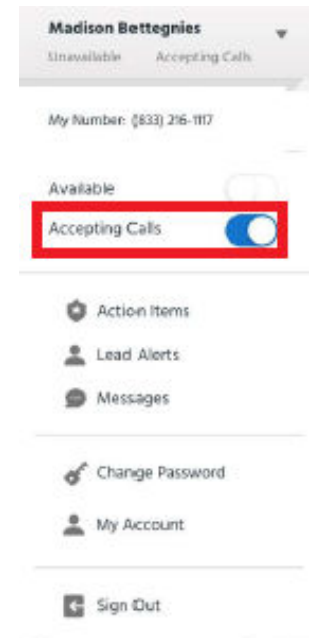
### Step 1:

- Schedule an appointment with your prospect at a time that you are both available.
- Your unique RATE number can be found in the drop-down menu in the Ascend Mobile Application. Provide this to your prospect.
- You cannot receive a RATE call if you are already in a meeting and there is not a voicemail option available for RATE.



### Step 2:

- At the schedule appointment time, your beneficiary will call your unique RATE-specific 1-800 phone number. Ensure you are ready to accept the call by toggling the 'Accepting Calls' feature on the drop-down menu. You will receive the call through your device
  - Note: We do not have the 'Available' function in Ascend.



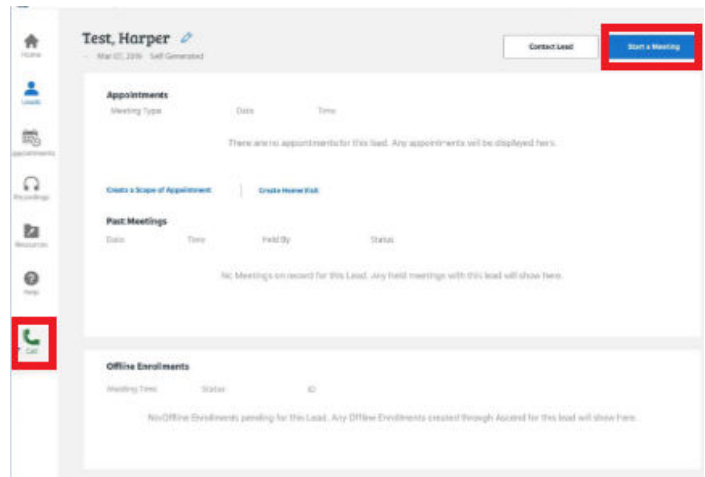
### Step 3:

- A pop up will appear when the call is coming through; click the 'Answer Call' button.
  - If your beneficiary calls in from the same number included in the lead, their name will appear. If the number is different, it will say unknown and you will want to go to the lead screen to find the lead to start a meeting.



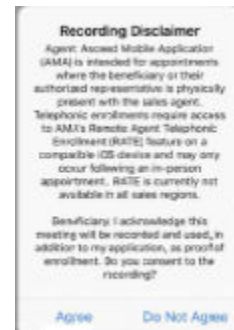
### Step 4:

- After accepting the call, go to the 'Lead' screen for the appropriate lead and click 'Start a Meeting' to begin the application using the Ascend Quote and Enrollment tool.
  - You will know you are in an active RATE call by reviewing the green phone on the navigation pane.



### Step 5:

- After you start a meeting, a recording disclaimer will appear. You must read the disclaimer to the beneficiary and click Agree to continue with the RATE call. If you do not hit Agree, the call will not be recorded and will not be able to continue.



### Step 6:

- Talk the prospect through the **approved telephonic enrollment** script for the specific year, located in the Resources in Ascend.
- It is easiest if you have another device or a hard copy of the telephonic enrollment script so you can read the script separate from entering information into the Ascend application instead of toggling between screens.