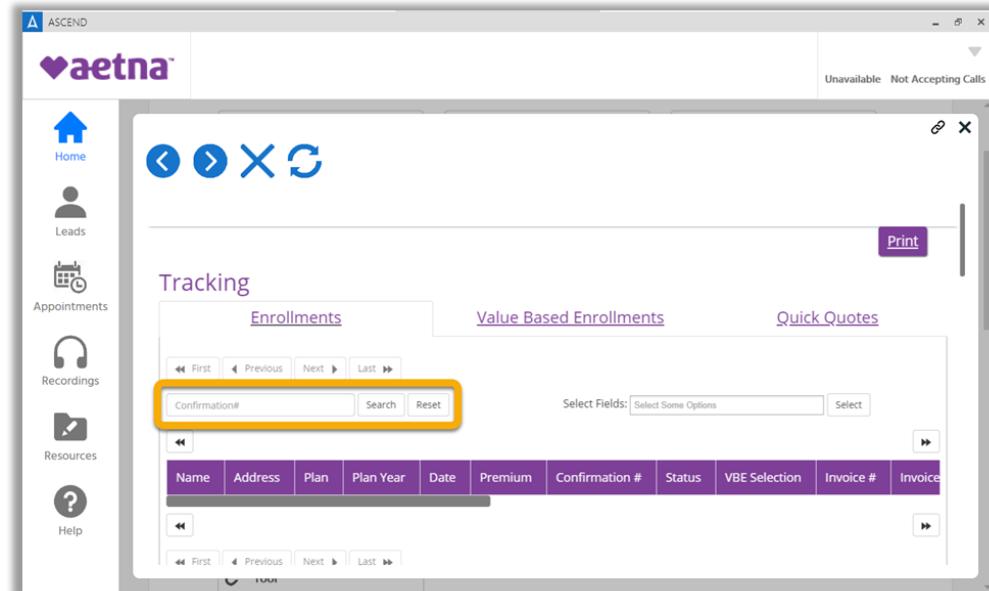
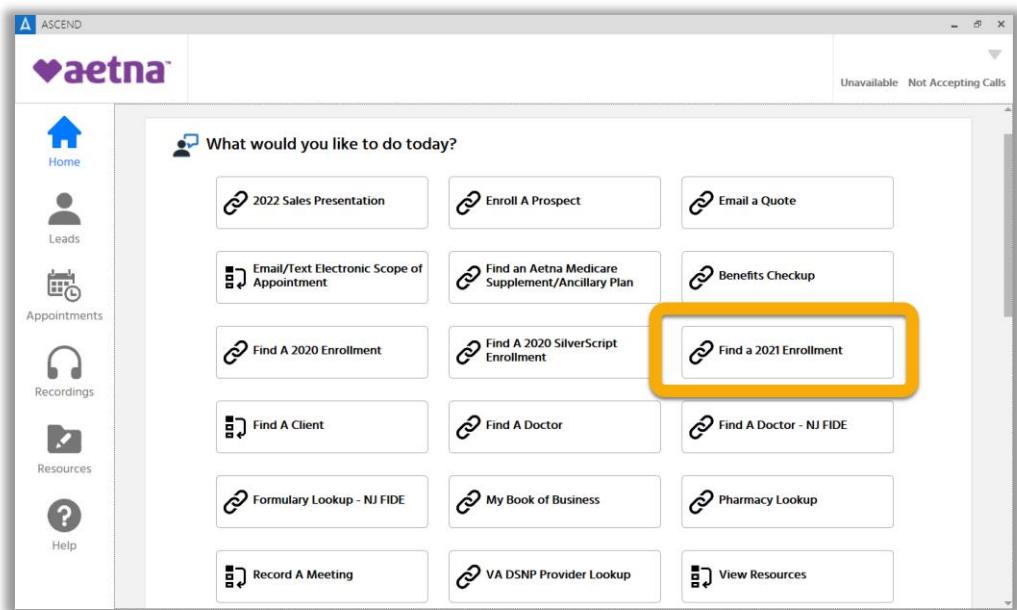


Instructions for downloading enrollments and SOAs from Ascend before the March 31 portal termination.

How to download Ascend Enrollments

1. Find a 2021 enrollment
2. Search by confirmation number
3. Click to open your lead
4. Select the “Print” icon
5. Click save or print



Name	Address	Plan	Plan Year	Date	Premium	Confirmation #	Agent Name	Agent NPN	Status	VBE Selection	Application Source	Print
TEST TEST	123, 123, Monroe, IN, 47401	Flagpole Advantage (HMO)	2021	4/8/2021 12:27:14 AM	94.00	0442403	AQE Test	NPN234	Application Submitted	Agent Completed	Agent Enrollment	

How to download Scopes of Appointment

1. Find a “Client”
2. Search for name under “All Leads”
3. Click arrow to the right of “Zip”
4. Click arrow to the right of “Scope of Appointment”
5. Click “Download SOA”
6. Click save or print

The image consists of three vertically stacked screenshots of the Aetna Ascend software interface, showing the process of downloading a Scope of Appointment (SOA).

Screenshot 1: All Leads View

This screenshot shows the "All Leads" view. On the left is a sidebar with icons for Home, Leads (which is highlighted with a yellow box), Appointments, Recordings, Resources, and Help. The main area displays a table of leads with columns for Name, Date Modified, Status, Source, County, and Zip. A lead for "Hall, L" is selected and highlighted with a yellow box. The "Add a Lead" button is visible in the top right.

Screenshot 2: Lead Detail View for Hall, L

This screenshot shows the detail view for the lead "Hall, L". The sidebar is identical to the first screenshot. The main area shows the lead's information and a table of past appointments. The "Scope of Appointment" row for May 14, 2020, is highlighted with a yellow box. On the far right, a vertical scroll bar is highlighted with a yellow box.

Screenshot 3: Meeting Detail View for Meeting #182166

This screenshot shows the detail view for a specific meeting. The sidebar is identical to the first screenshot. The main area shows the meeting details and a "Download SOA" button, which is highlighted with a yellow box. A modal window titled "Document Title and Instructions" is open, showing the "Scope of Sales Appointment Confirmation Form".