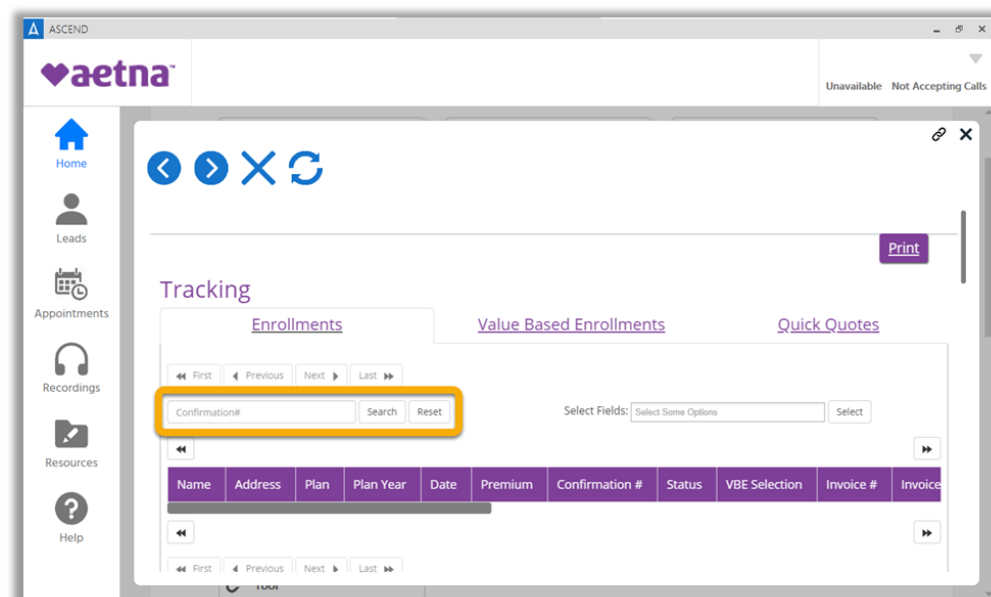
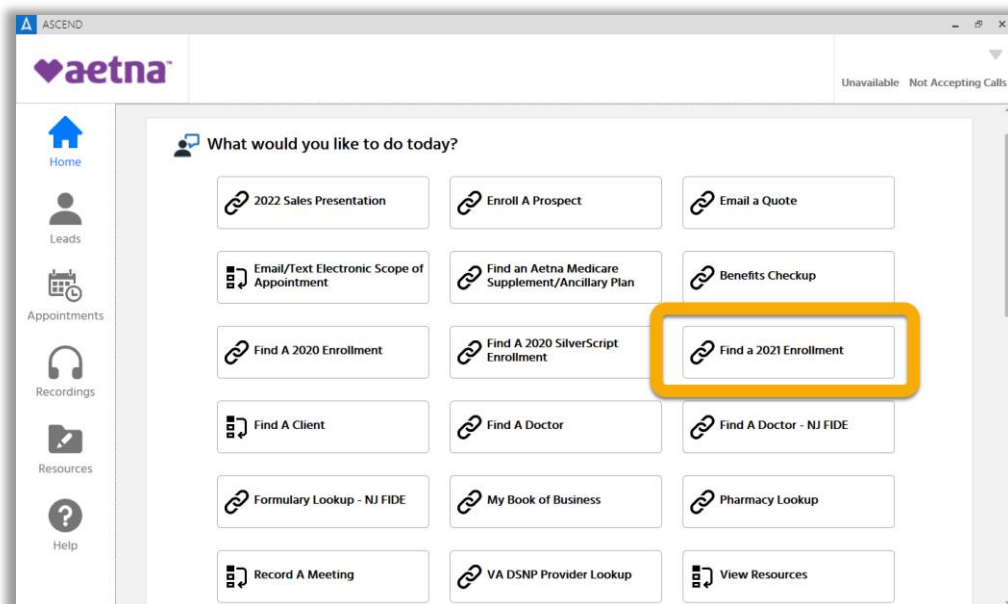


Instructions for downloading enrollments and SOAs from Ascend before the **March 31** portal termination.

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 screenshots illustrate the process of downloading a Scope of Appointment (SOA) for a client named Hall, L. The interface is the Aetna ASCEND application, featuring a sidebar with navigation icons for Home, Leads, Appointments, Recordings, Resources, and Help.

Screenshot 1: All Leads
The "All Leads" table lists several leads. The lead for "Hall, L" is highlighted with an orange box. The "Zip" column for this lead has a right-pointing arrow, which is also highlighted with an orange box.

Name	Date Modified	Status	Source	County	Zip
Bystritskaya, T	Feb 16, 2021		Self Generated		78247
Gallegos, R	Oct 15, 2020		Self Generated		78247
Hall, L	Mar 18, 2021		Self Generated		78247
Mills, J	Feb 07, 2020		Self Generated		78261
Stelter, D	Mar 18, 2021		Self Generated		78247
Test, Test	Mar 30, 2020				
Test, Test	Aug 28, 2020				

Screenshot 2: Client Profile (Hall, L)
The client profile for "Hall, L" is shown. The "Appointments" section displays a table of past appointments. The "Scope of Appointment" column for the first appointment has a right-pointing arrow, which is highlighted with an orange box.

Appointment Type	Start Date	Start Time	Status
Scope of Appointment	Dec 02, 2020	12:00 AM	Pending
Scope of Appointment	May 14, 2020	12:00 AM	Accepted
Scope of Appointment	May 14, 2020	12:00 AM	Accepted

Screenshot 3: Meeting #182166
The "Meeting #182166" window is open. The "Download SOA" button is highlighted with an orange box. The "Document Title and Instructions" section is visible, showing the "Scope of Sales Appointment Confirmation Form".

Screenshot 4: Meeting #182166 (Continued)
The "Meeting #182166" window is shown again, highlighting the "Download SOA" button and the "Document Title and Instructions" section.