



**AGENT VIRTUAL MEETING –  
ASCEND VIDEO**

# Agent Virtual Meeting



1. Agent schedules a virtual home visit

The screenshot shows the Ascend CRM interface for a lead named Whitney Adkins. The interface includes a sidebar with navigation icons for Home, Leads, Appointments, Recordings, Resources, and Help. The main content area displays the lead's name, status (New), date (Sep 11, 2020), and source (Self Generated). There are two buttons: 'Contact Lead' and 'Start a Meeting'. Below this, there are sections for 'Appointments' and 'Past Meetings', both of which are currently empty. At the bottom, there is a section for 'Offline Enrollments'.

**Ascend**

**Adkins, Whitney**

New Sep 11, 2020 Self Generated

[Contact Lead](#) [Start a Meeting](#)

**Appointments**

Meeting Type	Date	Time
There are no appointments for this lead. Any appointments will be displayed here.		

[Create a Scope of Appointment](#) | [Create Home Visit](#) | [Create Virtual Home Visit](#)

**Past Meetings**

Date	Time	Held By	Status
No Meetings on record for this Lead. Any held meetings with this lead will show here.			

**Offline Enrollments**

# Schedule Virtual Home Visit



2. Agent selects date and time of meeting.

The screenshot shows the Ascend CRM interface for a lead named Whitney Adkins. A modal window is open for scheduling a virtual home visit. The modal displays a calendar view with the following options:

Date	Hour	Minute	Time
Wed Sep 23	4	58	
Thu Sep 24	5	59	AM
Today	6	00	PM
Sat Sep 26	7	01	
Sun Sep 27	8	02	

The modal also includes a 'Cancel' button and a 'Save' button. The background interface shows the lead's profile with buttons for 'Contact Lead' and 'Start a Meeting', and a sidebar with navigation options like Home, Leads, Appointments, Recordings, Resources, and Help.

# Meeting is Scheduled



3. Once the meeting is scheduled it shows under the appointments list on BOTH the lead detail and Appointment screens.

The screenshot displays the Ascend CRM interface for a lead named Whitney Adkins. The lead is marked as 'New', dated 'Sep 11, 2020', and 'Self Generated'. The user 'Derek Foreman' is logged in, with status 'Unavailable' and 'Not Accepting Calls'. The interface includes a sidebar with navigation options: Home, Leads, Appointments, Recordings, Resources, and Help. The main content area shows the lead's name and two buttons: 'Contact Lead' and 'Start a Meeting'. Below this, the 'Appointments' section contains a table with one entry: a 'Virtual Home Visit' on 'Sep 25, 2020' at '06:00 PM'. There are also buttons for 'Create a Scope of Appointment', 'Create Home Visit', and 'Create Virtual Home Visit'. The 'Past Meetings' section is currently empty, with a message stating 'No Meetings on record for this Lead. Any held meetings with this lead will show here.' At the bottom, there is a section for 'Offline Enrollments'.

Meeting Type	Date	Time
Virtual Home Visit	Sep 25, 2020	06:00 PM

Date	Time	Held By	Status
No Meetings on record for this Lead. Any held meetings with this lead will show here.			

# Upcoming Appointments



4. The meeting now shows up in the upcoming appointments listing.

The screenshot shows the Ascend mobile application interface. At the top left is the Ascend logo. On the right, the user's name 'Derek Foreman' is displayed with status indicators 'Unavailable' and 'Not Accepting Calls', and a toggle for 'Enable iOS Calendar Sync'. A vertical sidebar on the left contains navigation icons for Home, Leads, Appointments (which is highlighted), Recordings, Resources, and Help. The main content area is titled 'Appointments' and features a section for 'Upcoming Appointments' for the date 'Sep 25, 2020'. A single appointment is listed: a home icon, the time '06:03 PM', the address '1801 S Liberty Dr, Bloomington, Indiana 47401', the name 'Whitney Adkins', and the phone number '(812) 361-0478'. Below this, a message states: 'No future seminars found. Any future seminars assigned to you will be displayed here.'

# Appointment Details



5. Selecting the appointment will show the details.

The screenshot displays the Ascend mobile application interface. At the top, the user's name 'Derek Foreman' is shown with a status of 'Unavailable' and 'Not Accepting Calls'. Below this, the 'Appointments' section is active, with a toggle for 'Enable iOS Calendar Sync'. A modal window titled 'Home Visit with Whitney Adkins' is open, providing the following details:

- Start Meeting**: A button to initiate the meeting.
- September 25**: Date and time '06:03 PM'.
- 1801 S Liberty Dr**: Address in Bloomington, Indiana, 47401.
- Contact**: Phone number '(812) 361-0478'.
- Map**: A map showing the location in Bloomington, Indiana, with a red location pin and a 'Get Directions' button.
- Buttons**: 'Go To Lead', 'Add Existing Scope', and 'Cancel Appointment'.

# Meeting Controls



6. The agent can text or email beneficiary the meeting details.

A screenshot of the Ascend web application interface. The top left shows the 'Ascend' logo. The top right shows the user's name 'Derek Foreman' and status 'Unavailable Not Accepting Calls'. The main content area is for a lead named 'Adkins, Whitney', with a 'Contact Lead' button and a 'Start a Meeting' button. A modal window is open in the center, titled 'Virtual Home Visit with Whitney Adkins'. It shows the date 'September 25' at '06:00 PM'. Below the date are three options: 'Send Email Invite', 'Send Text Invite', and 'Start Meeting'. At the bottom of the modal are 'Cancel Appointment' and 'Done' buttons. The background interface includes a sidebar with icons for Home, Leads, Appointments, Recordings, Resources, and Help. The main content area also has sections for 'Appointments' (with a table for Meeting Type and Virtual Home Visit), 'Past Meetings' (with a table for Date and Time), and 'Offline Enrollments'.

# Agent Starts Virtual Meeting



7. Agent starts the meeting. Agent is shown a preview of their video and waits for the beneficiary to join.

The screenshot displays the Ascend CRM interface for a lead named Whitney Adkins. The interface includes a sidebar with navigation options: Home, Leads, Appointments, Recordings, Resources, and Help. The main content area shows the lead's details, including 'New', 'Sep 25, 2020', and 'Self Generated'. There are two buttons: 'Contact Lead' and 'Start a Meeting'. Below this, there is a section for 'Appointments' with a table showing a 'Virtual Home Visit' on 'Sep 25, 2020' at '06:00 PM'. There are also buttons to 'Create a Scope of Appointment', 'Create Home Visit', and 'Create Virtual Home Visit'. A 'Past Meetings' section is empty, with a message: 'No Meetings on record for this Lead. Any held meetings with this lead will show here.' At the bottom, there is a section for 'Offline Enrollments'. In the top right corner, the agent's name 'Derek Foreman' is shown with status indicators 'Unavailable' and 'Not Accepting Calls'. A video preview window on the right shows a small video feed of the agent.



# Agent Meeting Controls



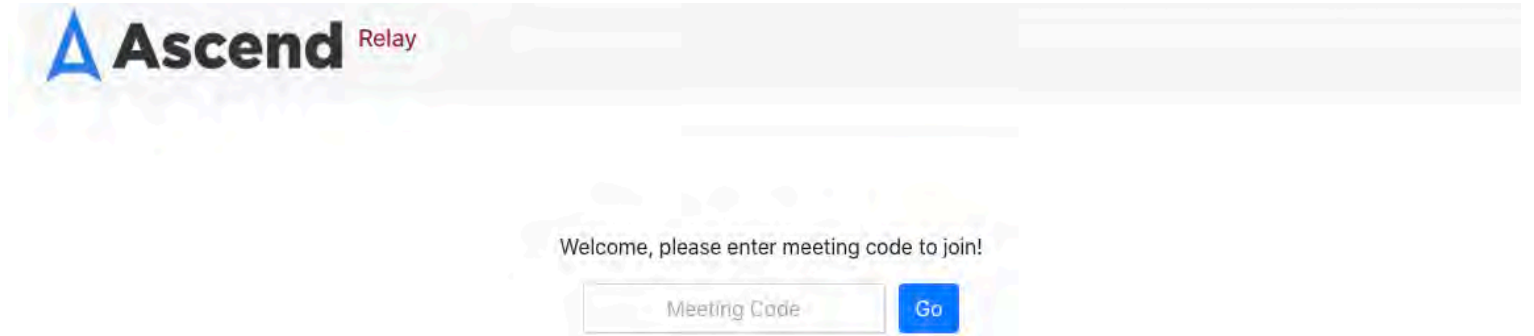
8. Touching the video screen shows common controls for the meeting such as *mute*, *stop video*, *hang-up*.

The screenshot displays the Ascend CRM interface. At the top left is the Ascend logo. On the right, the user's name 'Derek Foreman' is shown with status indicators 'Unavailable' and 'Not Accepting Calls'. The main content area is for a lead named 'Adkins, Whitney', with buttons for 'Contact Lead' and 'Start a Meeting'. Below this, there are sections for 'Appointments' and 'Past Meetings'. The 'Appointments' section shows a table with columns for Meeting Type, Date, and Time, containing one entry: 'Virtual Home Visit' on 'Sep 25, 2020' at '06:00 PM'. Below the table are three buttons: 'Create a Scope of Appointment', 'Create Home Visit', and 'Create Virtual Home Visit'. The 'Past Meetings' section has columns for Date, Time, Held By, and Status, with a message: 'No Meetings on record for this Lead. Any held meetings with this lead will show here.' On the right side of the interface, there is a video call window with three control buttons: 'Mute', 'Stop Video', and 'Hangup'. A left sidebar contains navigation icons for Home, Leads, Appointments, Recordings, Resources, and Help.

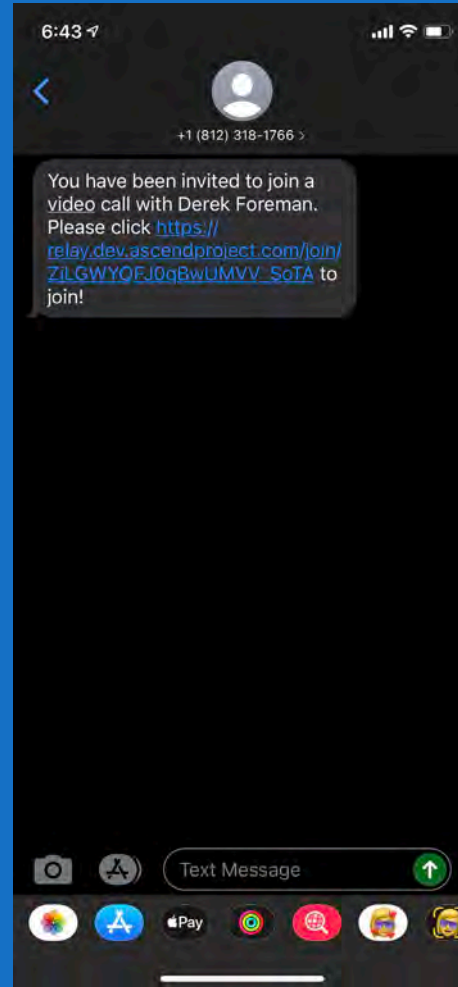
# Beneficiary Start Screen



- The beneficiary can click link from their email or text and the meeting ID will be automatically entered and the beneficiary will not see this screen. If they manually open a browser to the website, this is shown.



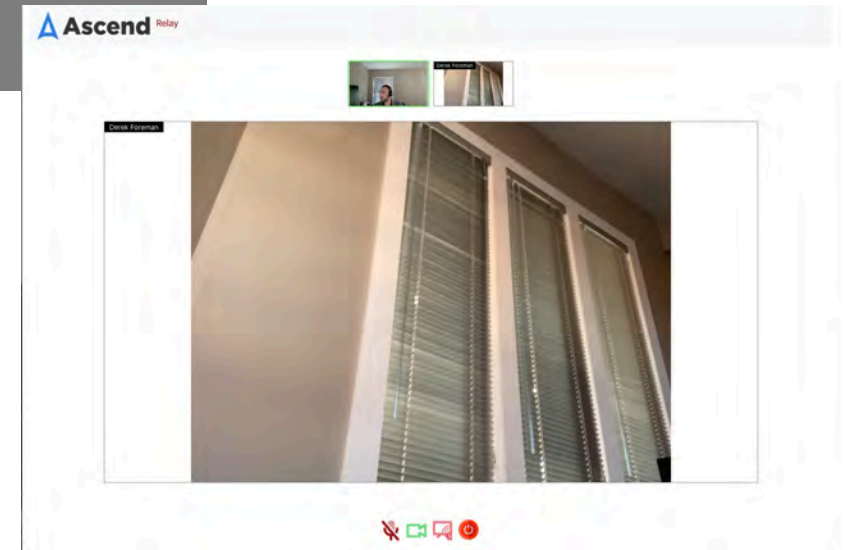
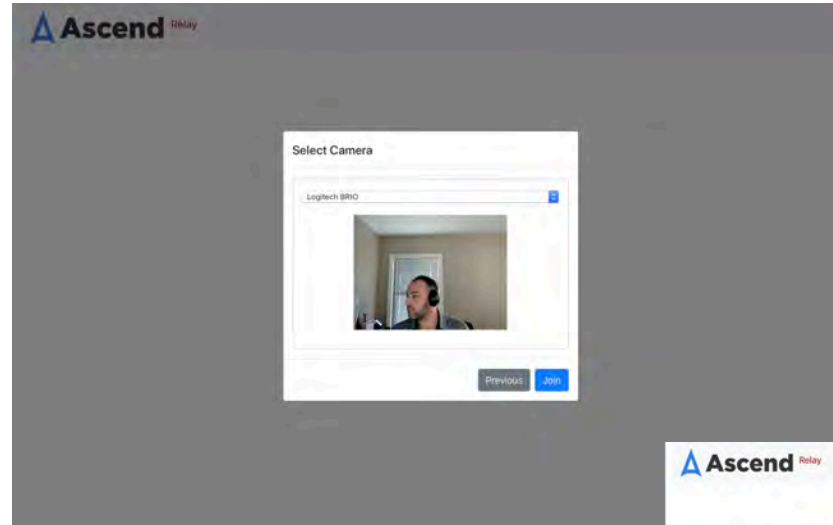
# Beneficiary Text Invitation



# Beneficiary Joining



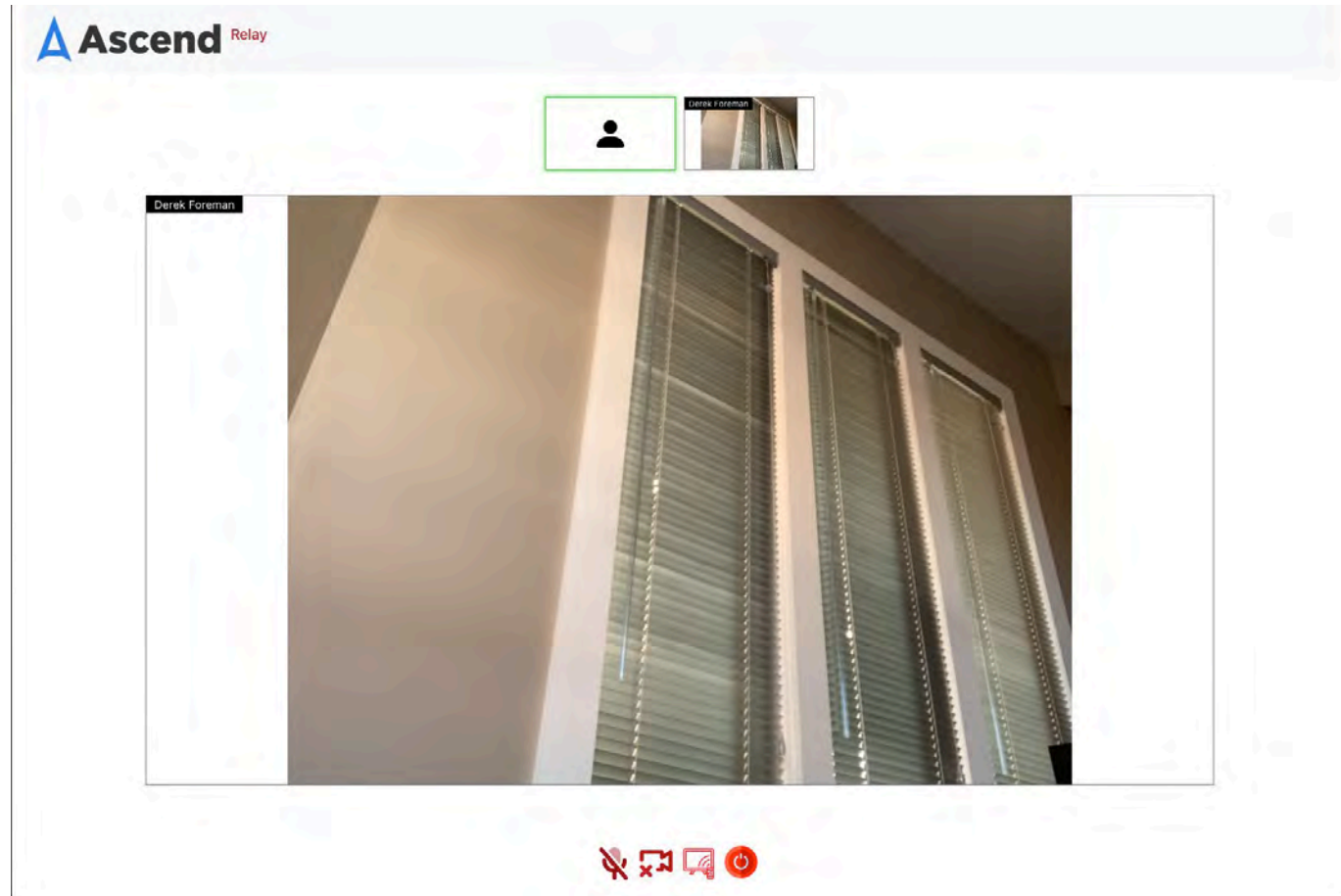
- When joining meeting, Beneficiary selects camera and microphone to allow Ascend access.



# Beneficiary Stopping Video



- Beneficiary can stop, start video mute and share their desktop (browser dependent)



# Agent Viewing Shared Screen



HealthNet MEDICARE PROGRAMS

Plan Year 2021

Health Profile ZIP Code Blue Button My Drugs My Doctor Our Plans

### 2021 Medicare Plans

Below are the plans that are available in ZIP Code 33101 in Miami-Dade County, Florida.

ZIP Code: 33101

Medicare Advantage Prescription Drug Plan

Select for Comparison

#### WellCare Dividend (HMO)

Plan Covers:  Dental  Vision  Hearing  Rx

In-Network Copay:

- Primary Care Physician: \$0
- Emergency Room: \$100
- Specialist: \$0
- Maximum Out-of-Pocket: \$10,000 Annual In-Network

Select for Comparison

#### WellCare Premier (PPO)

Plan Covers:  Dental  Vision  Hearing  Rx

In-Network Copay:

- Primary Care Physician: \$0
- Emergency Room: \$100
- Specialist: \$25
- Maximum Out-of-Pocket: \$1,400 Annual In-Network  
\$1,100 Combined In and Out-of-Network

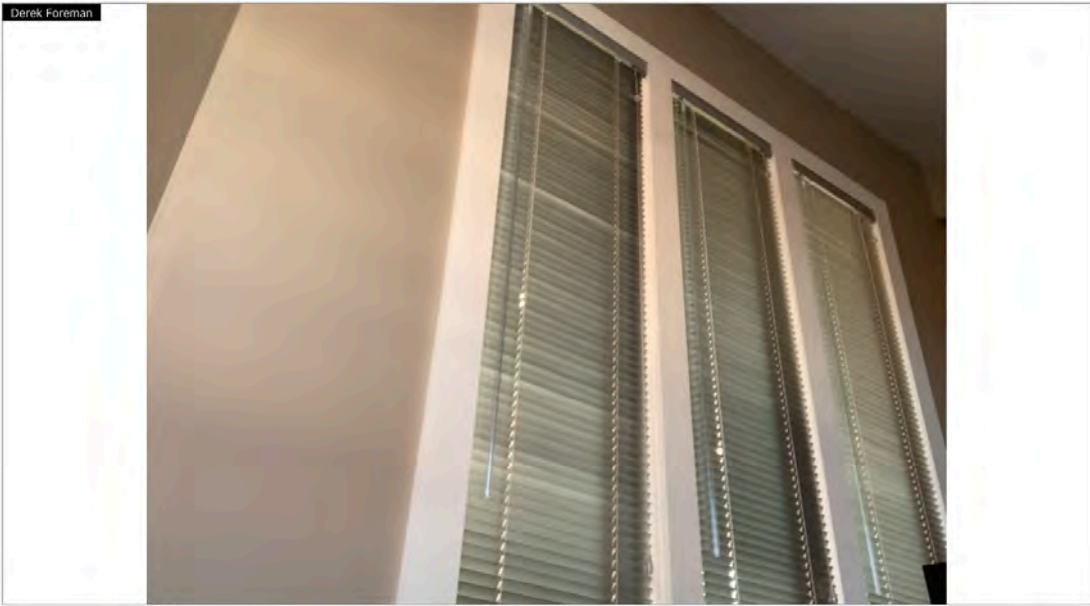
Offline Enrollments

# Beneficiary Viewing Agent Video



Ascend Relay

Derek Foreman



Derek Foreman

