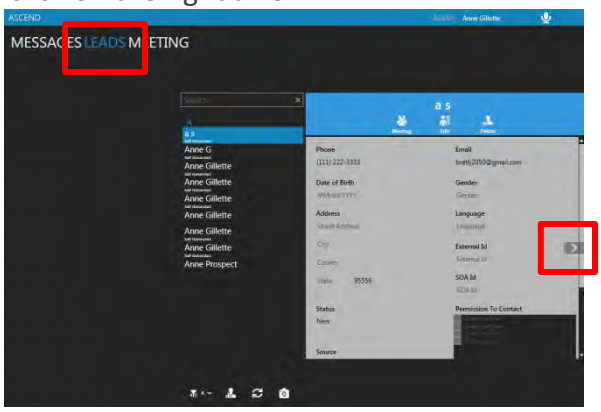
E-KITS

The fastest way to enroll prospects when you're not face to face, and ensure you receive credit for the sale!

Quick Start
Windows Version

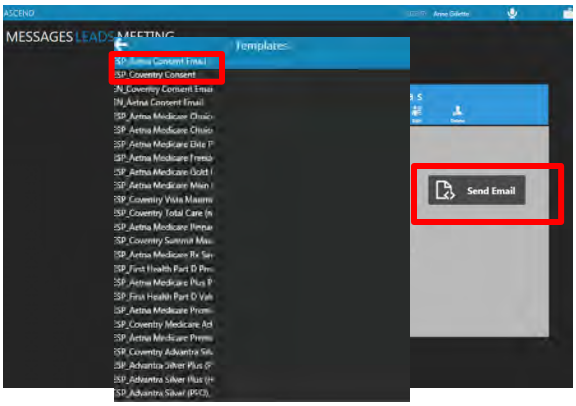
Step 1:

Click **Leads** from Ascend home screen and click on the right arrow



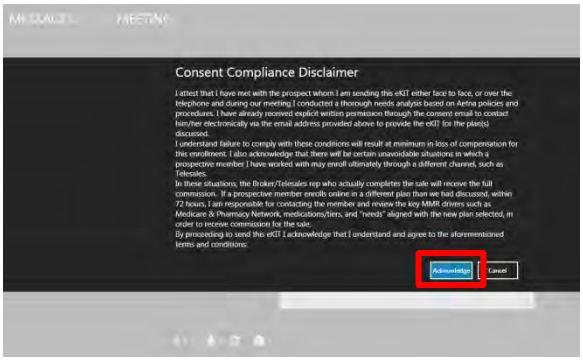
Step 2:

Select **Send Email** and double click on **Consent Email**



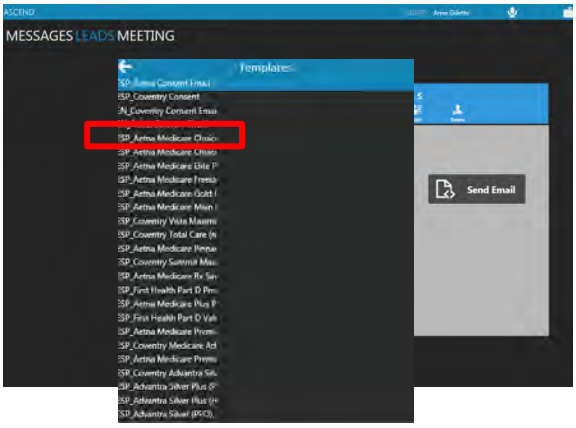
Step 3:

Click **Acknowledge** which will auto send the consent email



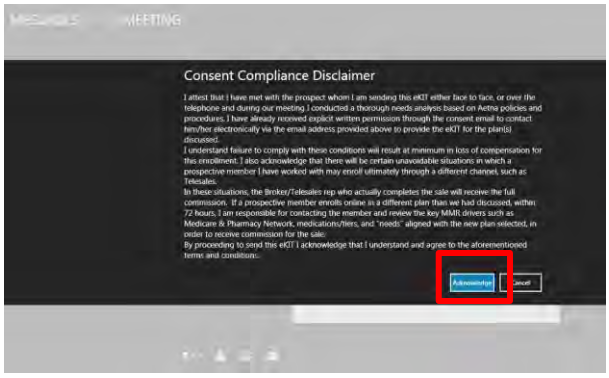
Step 4:

Once written consent is received, double click the appropriate **Ekit Email** template



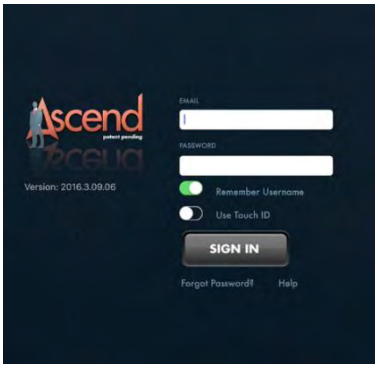
Step 5:

Click **Acknowledge** which will auto send ekit email



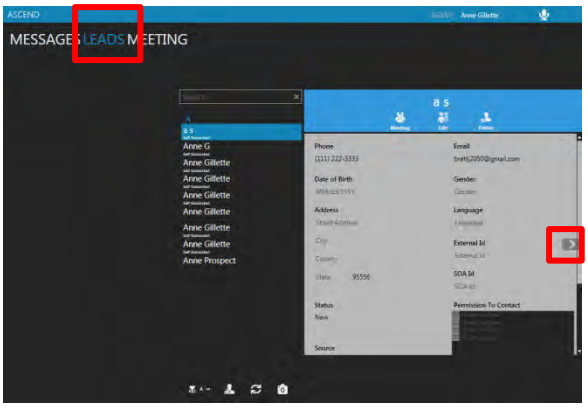
Step 1:

Open Ascend on your desktop. Sign in with your email and password.



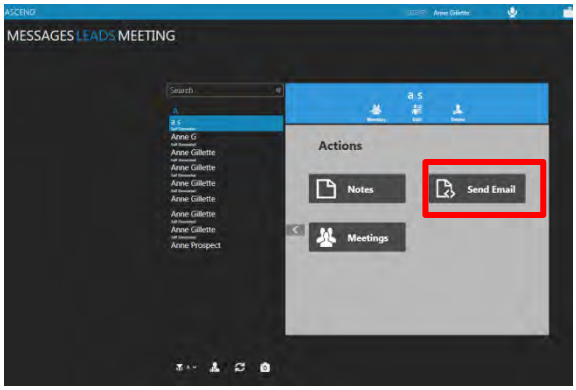
Step 2:

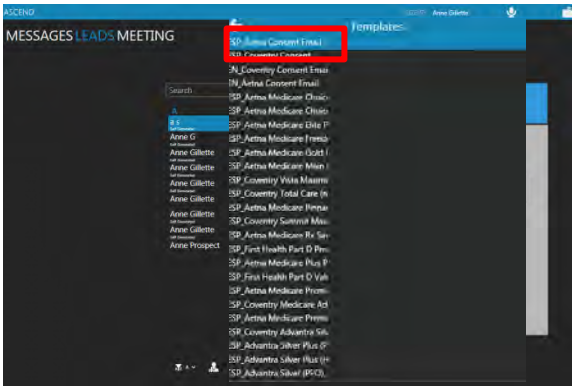
Click **Leads** and select or a create a new lead. Click on the **Right Arrow**.



Step 3:

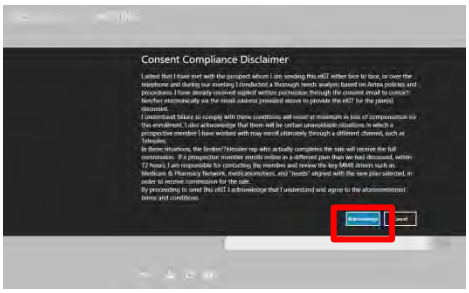
Click on **Send Email** then double click on the appropriate **Consent Email** template.





Step 4:

Click **Acknowledge** which will automatically send the consent email.



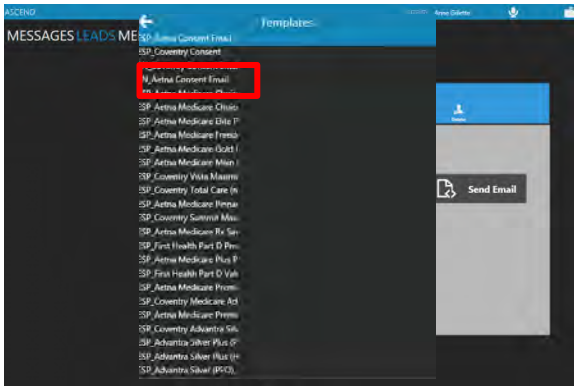
Step 5:

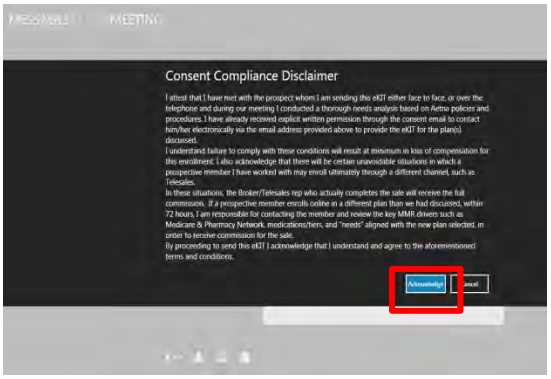
Beneficiary receives consent email and responds "**I consent**".

Beneficiary replies to broker email with:
"I consent"

Step 6:

Once written consent has been received, select the appropriate **Ekit Email** and again **Acknowledge** the broker attestation.

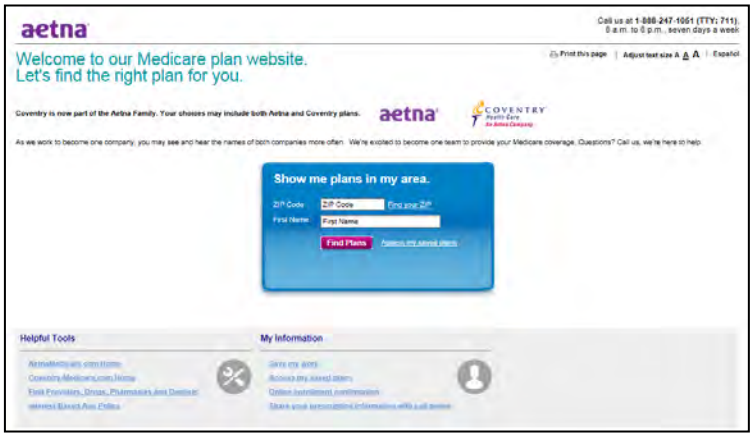




Step 7:

Beneficiary receives Ekit email with plan name and clicks “here” to begin the enrollment process. Your AWN/NPN is passed through to enrollment.

Link to online enrollment homepage.



Once a beneficiary has completed enrollment, credit for that enrollment will be attributed back to the broker.

IMPORTANT:

Standard Needs Analysis, Receiving an SOA, etc. requirements do not change.

We strongly recommend Brokers to reinforce the importance of calling them back should the prospect have any questions, to avoid the possibility of the prospect enrolling through another channel.

Broker will be notified if a beneficiary’s enrolled plan does not match the plan discussed. It is the brokers responsibility to then contact the beneficiary and confirm the plan in which they enrolled.