

All Plans or Select Plans Quote for New Clients

To generate an all or select plans quote for a prospective customer, click get a small business quote on the prospective quote screen. You can quote all plans or select the plans to include in the quote. Generating employee enrollment worksheets is covered in another video. There are descriptions of what each quote type provides. Click next. On the group details tab, enter the company name, number of employees, and ZIP code. Enter the company's contact name, phone number, and e-mail. Click next.

On the subscriber's tab, click manually add subscribers. The number you entered on the first screen is listed and you can change it if needed. Click continue. You can also use the quick subscriber upload link to add subscribers. For each subscriber, fill out either the date of birth or age. Click next. If you are completing a select plans quote, the plan Selection tab is included in the workflow. For an all-plans quote, this step is not included at the top of the tab.

There are guidelines for multiple plan offerings and a link to the small business guidelines document as a reference. Click add medical plans. Select the plans to include and click add plans to quote. If you don't want to add them, click Delete. You'll see a confirmation message. If you're adding a dental plan, click this link and repeat the process. Click next on the review rates tab. Rates for all available plans in the portfolio are listed by product type.

To change the product type, use the pull-down menu under the products. All subscribers are listed. Click the + to the left of the subscriber's name to see the rates for that individual for the selected product type. Scroll to the bottom of the screen. If you are done viewing the quote, click close. If you'd like to generate the quote and e-mail it to yourself or others, click this link on the e-mail my quote screen. You can designate your recipients by selecting or deselecting the boxes above. The person who will receive the quote is listed under group contact and your name should be listed under broker.

If these fields are blank or incorrect, follow these steps. If you'd like to send it to others, click additional recipients and enter the full e-mail address into the field. Click send. You'll receive a confirmation message saying that your quote should be delivered soon. The quote will be sent to only those recipients who are designated on the previous screen. It usually takes a few minutes to arrive. Click close to return to the dashboard. The quote will be listed in the transaction history.

When you receive the e-mail, open the attachment to view the quote.

To view the quote or do a re-quote, click the transaction ID for the quote. Scroll to the bottom of the page. You can download the same quote document you received in the e-mail from this link. If you'd like to create a new quote, click this link and go back through the tabs. The information from the quote will carry over so you can just modify the quote and requote. The steps for this link are covered in the generate and e-mail employee enrollment worksheets video. If the client likes the quote and wants to move forward, click enroll group. The information from the quote will carry over.

To see how to complete the workflow, refer to the enrolling a new group video.