Renewal Comparison Quote

To generate a comparison quote for an existing customer, select the customer from the renewal section of the dashboard.

A landing page for that group opens with the available renewal options.

Groups can update some of their group information by clicking here.

You can either select current plans compared to alternate renewal plans or renewal plans compared to alternate renewal plans.

On the renewal quote screen, compare my plans to different plans is selected. Confirm the effective dates for the renewal and the quote, which should align to the renewal date. Click next. On the group details tab, select whether you are offering another carrier. If yes, select the carrier from the pull-down menu and enter the number of enrollees. If you have that number, confirm the street address for the company. If you need to change the address, you can do it on this screen if you are also submitting a plan change in partnership with the quote.

If not, follow the existing process for address changes. Click next. On the subscriber tab, you can view the census information for the group.

When generating this quote, you can remove subscribers by clicking remove to the right of the subscriber record. You can add subscribers by using them manually add subscribers or quick subscriber upload links.

Click next.

On the plan selection tab, the plans the group is offering as part of the renewal are listed. To add a plan, click add medical plans, select them, and click had plans to portfolio. If you don't want to add plans, click undo add plans. To delete or replace a plan, click add it to the right of the plan. Select whether you want to replace the plan with another plan in the portfolio or with a new plan not currently in the portfolio. For an existing plan, select the replacement from the pull-down menu and click done.

You'll see a confirmation message and the specifics are listed. You can undo the change by clicking the link to the right and click yes in the confirmation box.

For a new plan, select new plan and then select the new replacement plan from the list that opens. Plans not currently in the portfolio will have a choose this plan link. If there is no link, then it's already in the portfolio. You'll see a confirmation message and the specifics are listed. You can undo the change by clicking the link to the right and click yes. In the confirmation box, scroll down to the bottom of the list to see the new plan. Repeat the process for dental plans. Click next.

On the plan assignment screen all the subscribers are listed. You can sort the list by the options in the pull-down menu to find subscribers. You can see the subscribers current medical plan and select a different medical plan if the subscriber wants to change, click next.

On the rating type and contribution tab, the rating type will be member level. Select specifics for employer contributions and other fields will open based on your selections.

Click next on the review rates tab. You can see rating and contribution information and group-level premiums for the specified plans, including premium changes. Premiums for each subscriber are listed, and you can see an overview as well as detailed information by clicking the medical tab. If a subscriber changed plans, the premium change is listed here. 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 renewal is listed under contract signer 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. 4:11

You'll receive a confirmation message saying that your quote should be delivered soon. The quote will be sent to only those recipients you 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 Transactional history list.

When you receive the e-mail, open the attachment to view the quote. To view the quote or do a requote, click the transaction ID for the quote.

Scroll to the bottom. 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. If you'd like to convert the quote to a plan change, click this link.

Review the attestation, then fill out your name and title, provide your signature, and click Accept signature.

Provide the name and contact information of the person who is in charge of this transaction and any comments. Click submit to initiate the contractual change. From the quote, you'll see a confirmation message. Click close.

You will also get a confirmation message via e-mail within 10 to 15 minutes.

The submitted plan change is listed in the transactional history on your dashboard. Once the plan change is approved, you will receive a confirmation letter.

The status of the transaction will change to Completed.