

Prospect Employee Enrollment Worksheets

As you complete your select plans quote with employee enrollment worksheets, you can find out more about the worksheets by clicking the question mark.

To generate and email the worksheets, click this link. On the Email my worksheets screen, select details for employer contributions, and other fields will open based on your selections.

Select whether you'd prefer to receive the worksheets for all employees in one document, or in separate documents for each employee in a zip file. To receive one document, select that option. Click Next.

On the Email My Worksheets screen, you can designate your recipients by selecting or deselecting the boxes above. There is a group contact and an additional recipient's option, and for brokers generating the worksheets, the broker's name and email are also listed. To send the worksheets to others, click Additional Recipients and enter the full email address into the field. Click Send. You will receive a confirmation that the worksheets should be delivered soon. Click Close.

When you receive the worksheets, you can see that all subscribers are listed in one PDF document, and you can use the bookmarks to jump to a certain subscriber. The options and costs are listed for each subscriber, and there is a field under this information where the plan choice is made. To receive separate worksheets, select the option to have separate PDFs for each employee. Click Next. Designate your recipients, and for brokers generating the worksheets that information will also be listed. Click Send. You will receive a confirmation that the worksheets should be delivered soon. Click Close.

When you receive the worksheets, they will be in a zip file. Open the file. Each worksheet is listed and contains the same information as the single document. By having separate worksheets, you can hand them out to each subscriber to review and make a plan selection.