

# New Quote

## Quick Reference Guide



UnitedHealthcare®

A UnitedHealth Group Company

Quote Process	Four Steps
<p>1. From the <b>Activities</b> menu select <b>New Quote</b>. <b>Company Profile</b> page appears.</p> <p>2. Enter all applicable information regarding the company.</p> <p style="padding-left: 40px;">Fields with more information available, select the field level help icon.</p> <p style="padding-left: 40px;">Mandatory fields contain an *</p> <p style="padding-left: 40px;">Some fields as information is entered a listing of matching items will display to select from. For example, the <b>Zip Code</b> field will display a listing of items from which to choose.</p> <p>3. Select <b>CONTINUE</b> to move to the next screen.</p> <p>4. Complete the <b>Additional Company Information</b> as applicable.</p> <p style="padding-left: 40px;">This screen you would designate if quoting for multiple locations.</p> <p style="padding-left: 40px;">Some fields with a <b>Yes</b> answer may open other sections to complete. If quoting Life and Disability, will need to enter Salary and Date of Birth on Census Screen.</p>	<p>The four steps to complete the quote:</p> <ol style="list-style-type: none"><li>1. Company Profile</li><li>2. Employee Census</li><li>3. Plan Selection</li><li>4. Quote Summary</li></ol>
<p>5. Select <b>CONTINUE</b> to move to the next screen.</p> <p>6. From the <b>Census Information</b> screen, select one option, <b>Add One At A Time</b> OR <b>Import From Template</b>.</p> <ol style="list-style-type: none"><li>a. To add one employee at a time, select the <b>Add Employee</b> option.</li></ol> <p style="padding-left: 40px;">Age is only mandatory field. <u>Note:</u> if quoting Life and Disability Salary and Date of Birth must be entered.</p> <ol style="list-style-type: none"><li>b. To import from the template, select <b>Download Census Template</b>.</li></ol> <p>7. Select <b>CONTINUE</b> to move to the next screen.</p> <p>8. Select the plans from the <b>Plan Selection</b> screen.</p> <ol style="list-style-type: none"><li>a. All plans available will display. .</li><li>b. To view rate details select <b>View Rate Details</b>.</li><li>c. To view all details select <b>View All Details</b>.</li><li>d. To compare plans side by side – select the plans by choosing the checkbox next to <b>Compare up to 3</b>, then select <b>Compare up to 3</b>.</li><li>e. To view more plans then display of the screen, select <b>View More Plans</b> at the bottom of the screen.</li><li>f. To add a plan(s) to quote select <b>Add To Quote</b></li></ol>	<h3 style="text-align: center;">Census Template</h3> <p>Census Template can be obtained:</p> <ul style="list-style-type: none"><li>• Directly from the Census screen</li></ul> <p style="text-align: center;"><b>OR</b></p> <ul style="list-style-type: none"><li>• Tools Menu, select Template</li></ul>
<p>9. Select <b>CONTINUE</b> to move to the next screen.</p> <p>10. From the <b>Quote Summary</b> Screen, several options are available:</p> <ol style="list-style-type: none"><li>a. <b>Continue Shopping</b> – to add more plans to proposal.</li><li>b. <b>Save and Exit</b> – to save the proposal and exit the program.</li></ol>	<h3 style="text-align: center;">Screen options</h3> <p><b>Cancel</b> – exit out</p> <p><b>Save &amp; Exit</b> – save to return later</p> <p><b>Continue</b> – move to next screen.</p>