<u>New Quote Help</u>

1. From the **Activities** menu select **New Quote. Company Profile** page appears.
2. Enter all applicable information regarding the company.

   Fields with more information available, select the field level help icon.

   Mandatory fields contain an *

   For some fields as information is entered, a listing of matching items will display to select. For example, City and State will populate based on Zip Code entered. from.

   The **Effective date** is either the 1st or 15th or the month.

   Total Employees Applying (Active and Cobra), the Census must reflect this number.

   The **SIC code** field will display codes as you enter information into the field.
3. Select **CONTINUE** to move to the next screen.
4. Complete the **Additional Company Information** as applicable.

   Some fields with a **Yes** answer may open other sections to complete. If quoting Life and Disability, will need to enter Salary and Date of Birth on Census Screen.

5. Select **CONTINUE** to move to the next screen.
6. From the **Census Information** screen, select one option, **Add One At A Time** OR **Import From Template**.
   a. To add one employee at a time, select the **Add Employee** option.

      Complete the applicable fields. Age is only mandatory field. <u>Note:</u> if quoting Life and Disability Salary and Date of Birth must be entered.

      Dependent information can be entered here as well.

   b. To import from the template, select **Download Census Template**.
7. Select **CONTINUE** to move to the next screen.
8. Select the plans from the **Plan Selection** screen.
   a. All plans available will display. Sort is available by Premium. There are different display options, choose the option by selecting the applicable icon.
   b. The left hand navigation area can be used to filter the plans.
   c. To view rate details select **View Rate Details**.
   d. To view all details select **View All Details**.
   e. To compare plans side by side – select the plans by choosing the checkbox next to **Compare up to 3,** then select **Compare up to 3**.
   f. To view more plans then display of the screen, select **View More Plans** at the bottom of the screen.
   g. To add a plan(s) to quote select **Add To Quote**
9. Select **CONTINUE** to move to the next screen.
10. From the **Quote Summary** Screen, several options are available:
    a. **Continue Shopping** – to add more plans to proposal.
    b. **Save and Exit** – to save the proposal and exit the program.
    c. **Generate Proposal** – to initiate the proposal.
11. On the **Proposal Screen,** review and complete the fields.
    a. **Preview Proposal** option allows you to review the information.
    b. **Send Proposal** option will forward the proposal to the email addresses entered earlier on the screen.

Broker Enroll Help

Complete Employer Application –

Select **Enroll** from the **Quote Summary Screen.**
From **Complete Employer Application** screen select the option Select Current User (Me), then Select **Enroll.**
From **Let's Get Started screen**, review the supporting documents list; click the **NEXT** button to begin. As you move through the process the system will check off each section (step) at the top of the screen, as each section is completed.

Action Steps:

1. Employer Information: enter the applicable information, mandatory fields are marked with a red asterisk *. Click the **NEXT** button to continue.
2. Employer Contribution(s**)**: enter the contribution for each plan. Choice is either a specific dollar amount or percentage. Click the **NEXT** button.
3. Eligibility Requirements: complete the answers to the questions. Click the **NEXT** button. General Information: complete each section, depending on the answer to the questions, other fields may appear to complete. Click the **NEXT** button. Questions Regarding Group Size: enter the applicable information, mandatory fields are marked with a red asterisk *. Depending on the answer to the questions, other fields may appear to complete. Click the **NEXT** button.
4. Current Carrier Information: complete the screen. Depending on the answer to the question, other fields may appear to complete. Click the **NEXT** button.
5. Producer Information: verify and complete the information. Mandatory fields are marked with a red asterisk *. Click the **NEXT** button to continue.
6. Employer Application Summary: review the information for accuracy, if edits are needed, select **EDIT** from the appropriate section. If a printout is desired, select the **PRINT** button. Click the **NEXT** button.
7. Signature on Behalf of Employer: review each section on the screen. Complete the **Electronic Signature Section** (NOTE: the signature must match the name exactly, including any middle initial). Click the **SUBMIT** button.

Complete Enrollment on Behalf of Employees –

Select the **START ENROLLMENT** button, then enter the applicable Start and End dates. Next select **OPEN ENROLLMENT**.

After the message appears alerting no email addresses have been added for employees, select **CONTINUE.**

Upload Required Documents for the following:
Wage and Tax Forms
Direct Deposit Authorization Form
Copy of Binder Check

Select **UPLOAD** next to each item to search and select the document to upload. When the document is uploaded, the name of the document will appear on the screen.
To view the form, click on the underlined form name.

Select **MANAGE EMPLOYEES**.

Then from the **Actions** column, select **Start Enrollment** for each employee.

Complete each of the sections:

1. Waive Coverage (if applicable). Select **NEXT**.
2. Coverage Selection. Select the appropriate plan(s) by choosing the corresponding radio button. To learn more about the plan select the plan name. To view rate information, select **VIEW**. Select **NEXT**.
3. Employee Information. Complete the appropriate information. Mandatory fields are marked with a red asterisk *. Select **NEXT**.
4. Dependent Information (complete if applicable). Select **NEXT.**
5. Enrollment Summary: verify the information is correct. A print option is also available, by selecting the **PRINT** button. The **EDIT** option allows for changes/corrections for a particular section.
6. Signature. (NOTE: the signature must match the name exactly, including any middle initial). Click the **SUBMIT** button.
7. Select **RETURN TO MANAGE ENROLLMENT** button.

Complete the above steps for each employee. Once completed select **SAVE** at the bottom of the screen. Next select the **FINALIZE ENROLLMENT** and then **FINALIZE** to complete the process.

When the **Acceptance Completed** screen appears, select **DONE**.

<u>Employer Enroll Help</u>

<u>Employer Registration</u>

From the **Employer Registration** screen, enter the first name, last name and tax ID. Select **CONTINUE**.

Complete the User Profile information on the **Account Settings** screen. Mandatory fields are marked with a red asterisk *

Next complete the Create Login Information section.

Selecting **check availability** will verify if the user id chosen is available.
The information icon will display the rules when creating and ID and Password.
Setting up a security question/answer are mandatory fields.
Select **CONTINUE**.

From **Let's Get Started screen**, review the supporting documents list; click the **NEXT** button to begin. As you move through the process the system will check off each section (step) at the top of the screen, as each section is completed.

Action Steps:

1. <u>Employer Information:</u> enter the applicable information, mandatory fields are marked with a red asterisk *. Click the **NEXT** button to continue.
2. <u>Employer Contribution(s</u>**)**: enter the contribution for each plan. Choice is either a specific dollar amount or percentage. Click the **NEXT** button.
3. <u>Eligibility Requirements</u>: complete the answers to the questions. Click the **NEXT** button. <u>General Information</u>: complete each section, depending on the answer to the questions, other fields may appear to complete. Click the **NEXT** button. <u>Questions Regarding Group Size</u>: enter the applicable information, mandatory fields are marked with a red asterisk *. Depending on the answer to the questions, other fields may appear to complete. Click the **NEXT** button.
4. <u>Current Carrier Information</u>: complete the screen. Depending on the answer to the question, other fields may appear to complete. Click the **NEXT** button.
5. <u>Producer Information</u>: verify and complete the information. Mandatory fields are marked with a red asterisk *. Click the **NEXT** button to continue.
6. <u>Employer Application Summary</u>: review the information for accuracy, if edits are needed, select **EDIT** from the appropriate section. If a printout is desired, select the **PRINT** button. Click the **NEXT** button.
7. <u>Signature</u>: review each section on the screen. Complete the **Electronic Signature Section** (NOTE: the signature must match the name exactly, including any middle initial). Click the **SUBMIT** button.

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<u>Enrollment Setup</u>

From the **Upload Required Documents** section, upload each of the following doucments:

Wage and Tax Forms
Direct Deposit Authorization Form
Copy of Binder Check

Select the **UPLOAD** button next to each section to complete the process. . When the document is uploaded, the name of the document will appear on the screen.
To view the form, click on the underlined form name.

Select **OPEN ENROLLMENT** to begin the process of enrolling members.

After the message appears alerting no email addresses have been added for employees, select **CONTINUE.**

Then from the **Actions** column, select **Start Enrollment** for each employee.

Complete each of the sections:

1. Waive Coverage (if applicable). Select **NEXT**.
2. Coverage Selection. Select the appropriate plan(s) by choosing the corresponding radio button. To learn more about the plan select the plan name. To view rate information, select **VIEW**. Select **NEXT**.
3. Employee Information. Complete the appropriate information. Mandatory fields are marked with a red asterisk *. Select **NEXT**.
4. Dependent Information (complete if applicable). Select **NEXT.**
5. Enrollment Summary: verify the information is correct. A print option is also available, by selecting the **PRINT** button. The **EDIT** option allows for changes/corrections for a particular section.
6. Signature. (NOTE: the signature must match the name exactly, including any middle initial). Click the **SUBMIT** button.
7. Select **RETURN TO MANAGE ENROLLMENT** button.

Employee Enroll Help

Verify Employee/Account Settings:

From the email received, select **Enroll Now**.

On the Employee Registration – Verify Employee screen, enter the applicable information. Select **CONTINUE**.

Next on the **Account Settings** screen, complete each section**.** All mandatory fields are marked with a red asterisk "*".

User Profile Information.

Contact Information.

Create Login Information. Selecting **check availability** will verify if the user id chosen is available.

The information icon will display the rules when creating and ID and Password.
Setting up a security question/answer are mandatory fields

Select the **CONTINUE** button.

Shopping for a plan:

On the **My Account** screen, begin shopping for a plan, by choosing **SHOP FOR A PLAN** button.

The next screen will begin the process to see and compare plans, decide on plans and enroll in plans. Review the screen for items you may need before you begin.

To begin select the **START SHOPPING** button.

Add the selected plan to the cart by selecting the **ADD TO CART** button.
To review the plan details, select the **VIEW PLAN DETAILS** link.
Once all plans are chosen, choose **VIEW CART AND ENROLL** from the **Cart Summary** section.
Review or edit the information on the screen. Select **ENROLL NOW**.

Start Enrollment:

The next screen will display the information and items needed to complete the process.
Select the **START ENROLLMENT** button.

Complete each of the sections:

Employee Information: all mandatory fields are marked with a red asterisk "*". Click **NEXT**.
Dependent Information. If dependents, complete the screen. If no dependents, Click **NEXT.**
Enrollment Summary: verify the information is correct. A print option is also available, by selecting the **PRINT** button.
Signature. Review and complete the fields.

Select the **SUBMIT** button.

The **Employee Submission Confirmation** screen appears, print options are available. Once completed select **EXIT APPLICATION** to exit the screen.