

GroupQuote 2.0

1. Website link: [GroupQuote](#)
 - Log in using your username and password.
2. You will be taken to a list of all the groups that have been run in your account.
3. Hit the “New Group” button on top right of the screen or hit the “View Group” button to rerun a group (see point 10 for rerun guide.)
4. Enter the group information and then hit “Start Quote”.
 - a. Required fields: Group Name, State, County, Zip code.
 - b. If Address is provided enter it in the address field. If no address is provided enter a space in the address field. Do the same for the City field.

Group Information

Group Name <input type="text"/>	Logo <input type="button" value="Choose File"/> No file chosen
Address <input type="text"/>	Group Administrator <input type="text"/>
City <input type="text"/>	First Email <input type="text"/>
State ▼	Last Group Phone Number <input type="text"/>
Zip <input type="text"/>	<input type="text"/>
County ▼	<input type="text"/>
	### ### ####

5. On the Quote Information page enter the Effective Date and the number of eligible employees in their corresponding fields. Hit Save and Next.
 - a. Cobras ARE included in the number of eligible employees.
6. On the census page either enter each employee’s information and dependent information (if dependents are included) manually or hit the “Upload Census” button at the bottom right of the screen to upload the census you’ve created. (Instructions on how to create the census can be located in the “Census Guide” document.)
 - a. Change the “Coverage Tier” dropdown menu to match the elections given on the census.
 - b. Enter in the number of Children under the age of 15 (if any). If EC or Family coverage is selected and none of the children are under 15 years old enter a zero.
 - c. Enter the date of birth (MM/DD/YYYY) for Spouse and children ages 15-25 (if any).
 - d. Make sure to match the tobacco status with the census provided by checking the “Tobacco” switch for employees and dependents.
 - e. Once all employees are entered hit “Save and Next” at the bottom left of the screen.

Training Manual 2019

Employees as of 03/01/2019

Quote Information

2 Employees

3 New Plans

Employee Name: Jim Halpert, Date of Birth: 04/05/1989, Age: 29, Tobacco?: NO, Coverage Tier: Family

Spouse DOB: 08/09/1989, Spouse Age: 29, Spouse Tobacco?: YES, # Children Under 15: 0

Child 15-25 DOB: 02/11/1999, Child 15-25 Age: 20, Tobacco?: NO

Employee Name: Tim Bolos, Date of Birth: 02/01/1972, Age: 47, Tobacco?: NO, Coverage Tier: Employee Only

Upload Census Add Employee Save and Next

7. Click each plan to add it to the quote. You can filter plans with the tools on the left.

Training Manual 2019

Quote Information

Employees

3 New Plans

Filters Clear Filters

- Metal (4)
- Aetna SC (0)
- BCHP (0)
- BCBSSC (0)
- UHC SC Legacy (12)
- UHC SC Heritage (20)

Plans in Richland County

Cart (2) Save and Next

Aetna Life Insurance Company (SC)							
Plan Name	Deductible	Max Out of Pocket	Coinsurance	PCP	Specialist	Notes	Group Cost
SC Silver OAMC 6000 80/50	\$6,000/\$12,000	\$7,900/\$15,800	20%	\$30	\$75	-	1,917.06
SC Silver HNOnly 6000 80% \$30/75	\$6,000/\$12,000	\$7,900/\$15,800	20%	\$30	\$75	-	1,947.95

BlueChoice HealthPlan							
Plan Name	Deductible	Max Out of Pocket	Coinsurance	PCP	Specialist	Notes	Group Cost
Business Advantage Bronze 6000	\$6,000/\$12,000	\$7,900/\$15,800	50%	\$0 For First Two Visits, Then 50% After Deductible	50% After Deductible	-	1,616.02
Business Advantage Bronze 7921	\$7,900/\$15,800	\$7,900/\$15,800	0%	\$45	\$90	-	1,618.07
Business Advantage Bronze 7300	\$7,300/\$14,600	\$7,300/\$14,600	0%	Deductible	Deductible	-	1,618.56
Business Advantage Bronze 5550	\$5,550/\$11,100	\$7,350/\$14,700	50%/50%	\$40	\$40, Then 50% After Deductible	-	1,647.38
Business Advantage Bronze 4400	\$4,400/\$8,800	\$7,350/\$14,700	50%/50%	\$45	\$45, Then 50% After Deductible	-	1,649.98
Business Advantage Bronze 7100	\$7,100/\$14,200	\$7,100/\$14,200	100%/50%	\$45	\$90	-	1,660.37
Business Advantage Bronze 6550 HD	\$6,550/\$13,100	\$6,550/\$13,100	100%/50%	Deductible	Deductible	-	1,660.57
Business Advantage Bronze 7000	\$7,000/\$14,000	\$7,000/\$14,000	100%/50%	\$45	\$90	-	1,660.97
Business Advantage Bronze 3750	\$5,750/\$11,500	\$7,900/\$15,800	50%/50%	\$45	\$90	-	1,691.14
Business Advantage Bronze 5501 HD	\$5,500/\$11,000	\$5,500/\$11,000	0%	Deductible	Deductible	-	1,726.05
Business Advantage Bronze 7900	\$7,900/\$15,800	\$7,900/\$15,800	100%/50%	\$50	\$100	-	1,700.42

- Hit Ctrl+F to search for specific plans.
- Do this for each desired carrier.
- If more than 15-20 plans are desired you may need to select half of the plans at a time in order for it to print due to the size of the file.
- Once all plans are selected hit the "Save and Next" button at the top of the screen.

8. On the next page you will be given a list of all the plans you selected. At the top of the screen for "Print Options" check the following options.

- Select all print options except the Rate Table unless you want the age banded rates. (The Rate Table will make the file much larger but it provides the age banded rates for each plan).

- b. For "File Type" select either PDF or Excel.
- c. When finished hit the "Print Quote!" button at the bottom of the page.
- d. If a specific plan order is desired simply drag each plan to the order you want.

Print Options

Benefits Display

File Type <input checked="" type="radio"/> PDF	Cover Page <input checked="" type="radio"/> YES	Deductible <input checked="" type="radio"/> YES	Coinsurance <input checked="" type="radio"/> YES
Employee Cost Detail <input checked="" type="radio"/> YES	Census <input checked="" type="radio"/> YES	Max Out of Pocket <input checked="" type="radio"/> YES	Rx <input checked="" type="radio"/> YES
Rate Table <input type="radio"/> NO	Plan Summaries <input checked="" type="radio"/> YES	Primary Care Visit <input checked="" type="radio"/> YES	Specialist Visit <input checked="" type="radio"/> YES
Plans per Page <input type="text" value="3"/> <small>Maximum of 4</small>		ER Visit <input checked="" type="radio"/> YES	Urgent Care <input checked="" type="radio"/> YES
		Notes <input checked="" type="radio"/> YES	

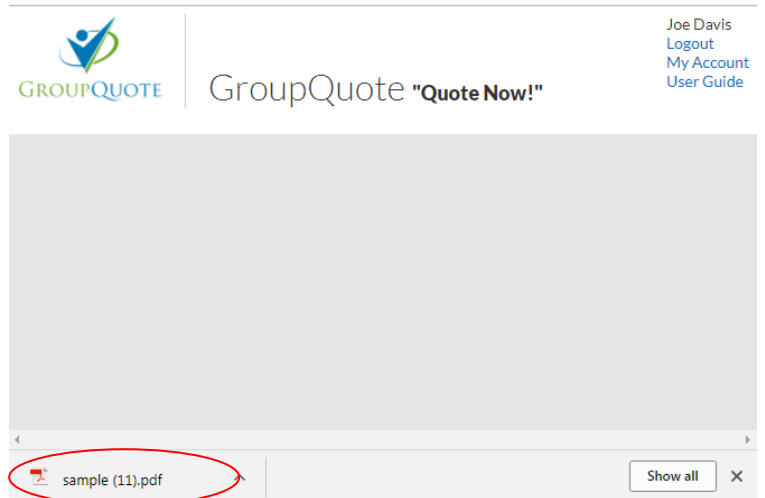
[Print Quote!](#)

Drag to Order Plans for Printing

Plan Name	Carrier	Total	Type
Business Advantage Bronze 7901	BCHP	\$1,618.07	New
Business Advantage Bronze 7900	BCHP	\$1,760.42	New

[Print Quote!](#)

- 9. A new window will open and the PDF/Excel will appear at the bottom of the screen.
 - a. Open the PDF and save.



10. Reruns:

- a. Hit the "View Group" button to rerun a group.

Groups [] [New Group](#)

Name	Number of Quotes		
THE PRACTICE LLC	3	View Group	Delete Group
TEST	1	View Group	Delete Group
TEST QUOTE 2019	2	View Group	Delete Group
Training Manual 2019	1	View Group	Delete Group

- b. If you want the plans you ran previously to show up you must hit the effective date instead of the "New Quote" button. If you do not need to copy the plans simply hit the "New Quote" button.

Training Manual 2019

Group Info

Address
SC 29210
Richland County

Group Admin

Quotes

Effective Date	Employees	Plans	Last Modified	
03/01/2019	2	2	02/06/2019	Delete

[Back](#)
[New Quote](#)
[Edit](#)

- c. You will be taken to the Print Options page. From here click the "Quote Information" button on the top left of the screen.

Training Manual 2019

[1 Quote Information](#)

Print Options

File Type: PDF

Employee Cost Detail: NO

Rate Table: NO

Cover Page: NO

Census: NO

Plan Summaries: NO

Benefits Display

Deductible: YES

Max Out of Pocket: YES

Primary Care Visit: YES

ER Visit: YES

Notes: YES

Coinsurance: YES

Rx: YES

Specialist Visit: YES

Urgent Care: YES

[Print Quote!](#)

Drag to Order Plans for Printing

Plan Name	Carrier	Total	Type
Business Advantage Bronze 7901	BCHP	\$1,618.07	New
Business Advantage Bronze 7900	BCHP	\$1,760.42	New

[Print Quote!](#)

- d. You will be taken to the Quote Information page. Make any changes required (change of effective date, change in number of employees) then hit the "Clone Quote" button.

The screenshot shows a web interface for quote management. On the left is a navigation menu with 'Training Manual 2019' and '1 Quote Information'. The main area is split into two columns: 'Required Info' and 'Advanced Options'. Under 'Required Info', there is a text box for 'Effective Date' containing '03/01/2019' and a text box for '# of Eligible Employees' containing '2'. Under 'Advanced Options', there are three toggle buttons: 'Enter Current Plan Benefits and Rates' (set to NO), 'Create Dual-Option Quotes' (set to NO), and 'Enter Employer Contribution' (set to NO). At the bottom right, there are four buttons: 'Print', 'Clear Quote Info', 'Clone Quote' (circled in red), and 'Modify'.

- e. You will be taken back to the Print Options page. From here click the "Employees" button or the "New Plans" button at the top left of the screen depending on what needs to be changed.
- f. Continue to steps 7 through 9 to finish quote.