



Quoting Instructions for Connexion Group Quote

October 21, 2014

On the [Connexion home page](#), click on the red “Group Quotes” button in middle tab under the photo and log in to the system using the “UIS” user name and the password you created for the system. If you haven’t established a password, check your inbox (and spam filter inbox) for an e-mail from ConnexionAdmin@ecssi.com inviting you to establish a password.

Existing Quotes

Upon landing at Group Quote you see a list of quotes submitted already. From the right column you can choose to **view** an existing quote, **copy** it (for a renewal perhaps) or **edit** it. You can use a search feature to find a quote from the list.

Client Name	Effective	Created	
Addison Sims of Seattle	Dec 2014	10/21/2014	view copy edit
Sample Group of Two	Dec 2014	10/21/2014	view copy edit
Addison Sims of Seattle	Dec 2014	10/21/2014	view copy edit
Addison Sims of Seattle	Jan 2015	10/2/2014	view copy edit
Addison Sims of Seattle	Jun 2014	4/3/2014	view copy edit

Getting a New Quote

To start a new quote, click on the **Start New Proposal** link in the upper right of the landing page which takes you to the quote request page.

Fill out the yellow highlighted fields for group information. If a highlighted field is not filled in, you will not be able to get quotes. There is a link to the NAICS Association website to help you find the right code for NAICS. Once you enter an NAICS code, the system will automatically populate the SIC code for the company.

There are two ways to enter census information. You can type in the census information in the table near the bottom of the page, or you can copy and paste census data from a formatted census spreadsheet – a copy of which you can download from the “[spreadsheet](#)” link in the smaller box on the left part of the page.

Note that the birthdate fields will allow either a date format (including just the birth year) or the age of the person in years (25, 36, 12, etc.). You can use the tab key to go left to right in the table and the “enter” key to go down in the table or add more rows. For most of our carriers, even some Life and Disability quotes, you do not need to answer the tobacco question to get a quote. Premera uses the employer’s zip code only.

	employee name (optional)	birth date	gender (m/f)	active / waiving / cobra / declining / ineligible / probation (a/w/c/d/l/p)	tobacco (y/n)	zip code	spouse (y/n/dob)	children (#)	child 1 dob	child 2 dob
1	defaults			a	n	employer's	n	0	1999-01-01	1998-01-01
3	1 Steve	9/15/1962	m	a			12/31/1972	3	6/14/2004	10/1
4	2 Laurie	3/12/1963	f	a			48	0		
5	3 Indranil	6/4/1964	m				47	2	7/1/2005	8/1
6	4 Alex	23	m							
7	5									
8	6									

Using the Census Excel Spreadsheet

Once all the information for the covered members is in the census spreadsheet you can use it to copy and paste it into Group Quote. From the spreadsheet, select all fields by clicking in the box in the upper left corner. This should highlight all fields on that worksheet. Select “copy” to put the data onto your clipboard. Next, go back to the Group Quote quote request page and put your cursor in the text box near the bottom left on the Group Quote site and select “paste” to put the census data all in that one box. This will populate the information in the census table near the bottom of the page.

Selecting, Retrieving and Viewing Quotes

Once the information is in the table, click on Get Quotes at the bottom of the page. As long as there are no yellow highlighted fields on the proposal or Other Quotes pages (see notes below), you should be able to click on it to get to the following summary page.

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GROUPS PROPOSAL HELP log out

Addison Sims of Seattle
7 employees, EE:3 ES:1 EC:0 EF:3
4024 NE 204th St.
Lake Forest Park WA 98155

NAICS: 541613
SIC: 8742
100% contribution for employees, 50% contribution for dependents.
Prior Dental Coverage: None
Effective: 2014-12-1

Census Detail

birth date	gender	status	tobacco	zip code	salary	spouse	children	child birth dates
1962-9-15	m	active	n		\$20,000	1972-12-31	4	2004-6-14, 2007-10-15, 2007-10-15, 2012-1-1
1963-3-12	f	active	n		\$40,000	1965-10-30	0	
1964-6-4	m	active	n		\$45,000	1966-10-30	2	2005-7-1, 2006-8-1
1990-10-30	m	active	n		\$25,000	n	0	
1987-10-31	m	active	n		\$30,000	n	0	
1949-11-4	m	active	n		\$60,000	n	0	
1959-8-22	m	active	n		\$48,000	1960-8-22	3	2000-1-1, 1999-1-1, 1993-1-1

At the top left of the summary page, **click on the carrier name, (“Premera”)** to send the census data to the carrier’s rating engine. A spinner shows it is working, and once done, **click on the word, “Premera” again** and you can select checkboxes next to the plans you want to quote, including dental plans. Clicking on the name of a carrier will pull rates from that carrier and you can then select plans.

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GROUPS PROPOSAL HELP log out

Addison Sims of Seattle
7 employees, EE:3 ES:1 EC:0 EF:3
effective 2014-12-1
quoted 2014-10-21

description	employee	spouse	children	family	total contribution
<input checked="" type="checkbox"/> Medical, Metallic, Balance Gold 500	-	-	-	-	\$7,751.13 \$5,864.14
<input type="checkbox"/> Medical, Metallic, Balance Gold 750	-	-	-	-	\$7,494.95 \$5,670.33
<input type="checkbox"/> Medical, Metallic, Balance Gold 1000	-	-	-	-	\$7,291.13 \$5,516.12
<input type="checkbox"/> Medical, Metallic, Balance Gold 1500	-	-	-	-	\$7,180.14 \$5,432.16
<input type="checkbox"/> Medical, Metallic, Balance Silver 2000	-	-	-	-	\$6,947.76 \$5,256.36
<input checked="" type="checkbox"/> Medical, Metallic, Balance Gold 500 PCP	-	-	-	-	\$7,882.14 \$5,811.94
<input type="checkbox"/> Medical, Metallic, Balance Gold 750 PCP	-	-	-	-	\$7,428.44 \$5,620.01
<input type="checkbox"/> Medical, Metallic, Balance Gold 1000 PCP	-	-	-	-	\$7,226.44 \$5,467.18
<input type="checkbox"/> Medical, Metallic, Balance Gold 1500 PCP	-	-	-	-	\$7,116.47 \$5,383.98
<input type="checkbox"/> Medical, Metallic, Balance Silver 1700 PCP	-	-	-	-	\$6,704.82 \$5,072.54
<input type="checkbox"/> Medical, Metallic, Balance Silver 2000 PCP	-	-	-	-	\$6,690.03 \$5,061.36
<input type="checkbox"/> Medical, Metallic, Balance Bronze 5500 PCP	-	-	-	-	\$5,092.77 \$3,852.95
<input type="checkbox"/> Medical, Metallic, Balance Gold 1300 HSA (\$250 Employer Contribution - 2 Family)	-	-	-	-	\$6,373.10 \$4,821.58
<input type="checkbox"/> Medical, Metallic, Balance Gold 1500 HSA (\$500 Employer Contribution - 2 Family)	-	-	-	-	\$6,070.08 \$4,592.34
<input type="checkbox"/> Medical, Metallic, Balance Silver 1700 HSA (No Employer Contribution)	-	-	-	-	\$6,359.05 \$4,810.96
<input type="checkbox"/> Medical, Metallic, Gold 1300 HRA (\$250 Employer Contribution)	-	-	-	-	\$6,866.65 \$5,194.99
<input type="checkbox"/> Medical, Metallic, Gold 1500 HRA (\$500 Employer Contribution)	-	-	-	-	\$6,532.99 \$4,942.55
<input type="checkbox"/> Medical, Metallic, Gold 1500 HRA High (\$500 Employer Contribution)	-	-	-	-	\$6,772.53 \$5,123.78
<input checked="" type="checkbox"/> Medical, Metallic, Balance Gold 500 Hearing /vision	-	-	-	-	\$7,955.89 \$6,019.06
<input type="checkbox"/> Medical, Metallic, Balance Gold 750 Hearing /vision	-	-	-	-	\$7,699.66 \$5,825.20
<input type="checkbox"/> Medical, Metallic, Balance Gold 1000 Hearing /vision	-	-	-	-	\$7,490.77 \$5,667.16

In the upper left you can click on the word “Summary” and it will show you on screen all the plans you have selected from the available carriers along with their rates.

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SIC: 8742
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1987-10-31	m	active	n		\$30,000	n	0	
1949-11-4	m	active	n		\$60,000	n	0	
1959-8-22	m	active	n		\$48,000	1960-8-22	3	2000-1-1, 1999-1-1, 1993-1-1

Plan Comparison

	employee	-spouse	-children	-family	total contribution
Premera					
<input checked="" type="checkbox"/> Medical, Metallic, Balance Gold 500	-	-	-	-	\$7,751.13 \$5,884.14
<input checked="" type="checkbox"/> Medical, Metallic, Balance Gold 500 PCP	-	-	-	-	\$7,082.14 \$5,811.94
<input checked="" type="checkbox"/> Medical, Metallic, Balance Gold 500 Hearing /Vision	-	-	-	-	\$7,055.89 \$8,019.08
<input checked="" type="checkbox"/> Dental, Dental Optima, Adult Dental Optima \$25/0%/10%/40%/1500	\$92.25	\$171.49	\$217.47	\$308.71	\$1,338.37 \$987.08
<input checked="" type="checkbox"/> Dental, Dental Preference Flex Plus, Adult Dental Preference \$25/0-20%/20-40%/50-80%/1000	\$57.46	\$119.80	\$151.92	\$214.27	\$934.99 \$698.81
MetLife					
<input checked="" type="checkbox"/> Dental, Coinsurance 100/80/50 - 80/60/40 Deduct \$50 / \$150; Max \$1,000; R&C Maximum Allowable Charge; Endo/Perio Covered in Basic; Ortho Not Included.	\$44.31	\$90.34	\$95.37	\$150.88	\$876.91 \$493.04
<input checked="" type="checkbox"/> Life, \$10,000.	-	-	-	-	\$37.77 -
<input checked="" type="checkbox"/> LTD, Benefit 60% of Salary; Monthly Max \$4,000; EP 90 days; Duration Lesser of RBD/5 years.	-	-	-	-	\$48.23 -

If you click on the PDF symbol next to the carrier name it will give you a proposal from that carrier. Clicking the PDF for Premera will give you a Proposal PDF of **all** the Premera Blue Cross plans.

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birth date	gender	status	tobacco	zip code	salary	spouse	children	child birth dates
1962-9-15	m	active	n		\$20,000	1972-12-31	4	2004-6-14, 2007-10-15, 2007-10-15, 2012-1-1

You can click on the Excel icon and download an Excel spreadsheet of the quotes for the specific plans you selected. There are six tabs (worksheets) on the Excel file, one for the group summary information, one for the census and one each for the rates on any medical, dental, vision and life/disability plans selected.

Getting Additional Ancillary Quotes for Products not yet Automated via Group Quote

Click on **Other RFQs** to request quotes for ancillary lines like Dental, Life, Disability and Gap plans. This allows you to select from a number of carriers to get additional quotes emailed to you from Connexion.

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Summary
VSP
MetLife
Premera
Other RFQ's

Addison Sims of Seattle

7 employees, EE:3 ES:1 EC:0 EF:3
effective 2014-12-1
quoted -

Note: Please refer to the [underwriting guidelines](#) for the following carriers.

Health Plans 51+

- Premera Blue Cross 51+
- LifeWise Health Plan of WA (Clark County) 51+

Dental Plans

- Premera Blue Cross 51+
- LifeWise Health Plan of WA (Clark County) 51+
- MetLife
- Guardian
- Best Life
- Willamette

Life and AD&D Insurance

- MetLife
- Guardian
- Reliance
- USABLE
- Washington National

Disability Insurance

- MetLife
- Guardian
- Reliance
- USABLE

Gap Coverage

- Symetra (Gap Medical) 51+
- Washington National (Critical Illness; Accident)
- Combined

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Summary
VSP
MetLife
Premera
Other RFQ's

NAICS: 541
SIC: 8742

Note that additional census information – such as salary – may be needed for certain ancillary plans, so unless you first enter that information into the census on the previous pages, you won't be able to submit the request for additional quotes to Connexion. An error message at the bottom of this page will let you know if additional information is required. Our Small Group Quoting staff will also contact you if there are questions or clarification on quoting additional ancillary lines.

If you have trouble logging in or getting a quote, please call us at **1-800-228-5798**.