Quick Start Guide

Connexion

Shopping & Quoting
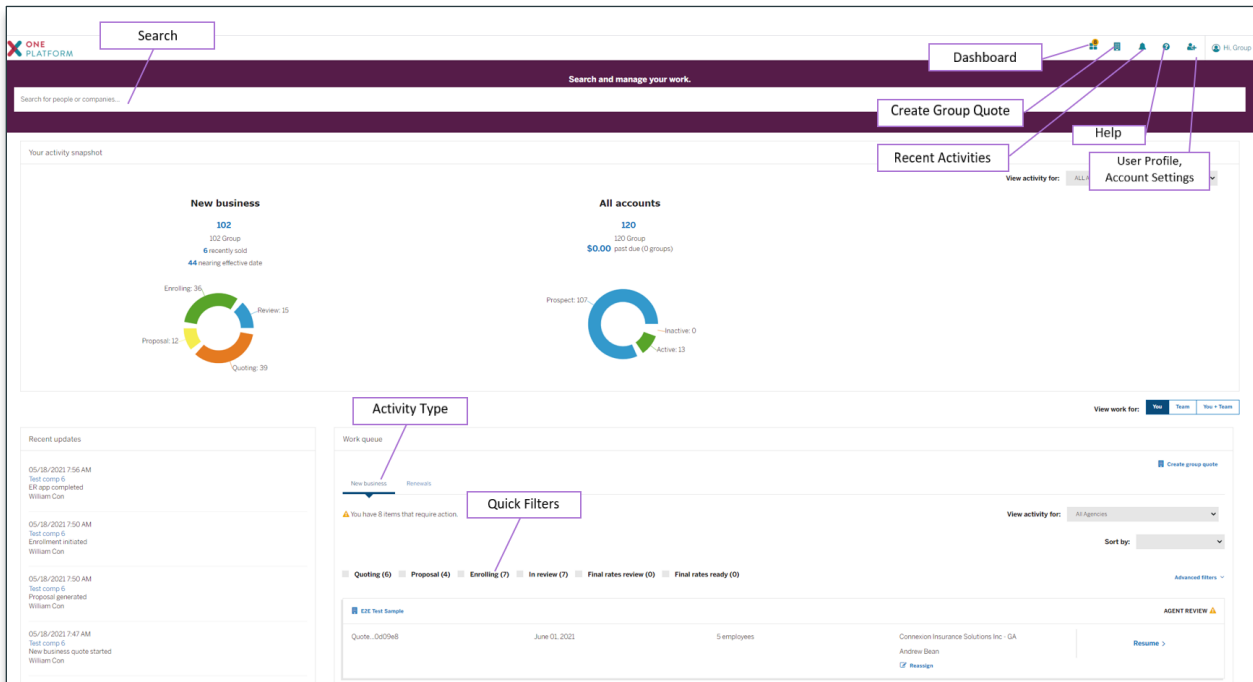
Table of Contents

Dashboard

- Log into the system or click the Dashboard link within the global navigation

- Global navigation:
    - create a group quote
    - view recent activities
    - view Help information
    - view user profile/account settings

- Search
    - Ability to search for existing people or companies using Search field
- Your activity snapshot
    - view activity snapshots by activity type (New business, Renewals and All accounts), market segment (IFP or Group) and status
- Recent updates
    - Displays activities recently updated with date, time, type of update, user and link to that record.
- Resources
    - Reference links to carrier provided material
- Work queue
    - Create IFP quote

- o Create group quote
- o Activity type
  - Quick access to the activity type you wish to review; New business or Renewals
- o Quick filters
  - Allows you to quickly filter results of your work queue by the current status.
  - Status displayed will vary based on the Activity type selected
- o View
  - Allows you to view just group activities, just IFP activities or All activities
- o Advanced filters
  - Provides more detailed filter criteria

Please use a comma between multiple contacts or locations.

Company	Primary applicant name	Contact

Locations

Created	Effective date	Total census
▾	_/_/___	
	to	to
	_/_/___	

Activity

Excludes end status activities

- Quoting (9)
- Proposal (4)
- Enrolling (23)
- In review (1)
- Final rates review (2)
- Final rates ready (0)

Clear all filters   Hide advanced filters
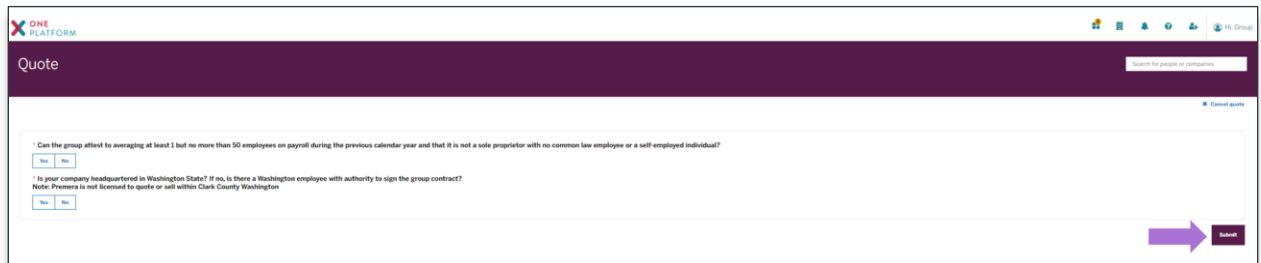
Create a Group Quote

- Access the Dashboard
- Click 'Create group quote' icon or link from the Dashboard
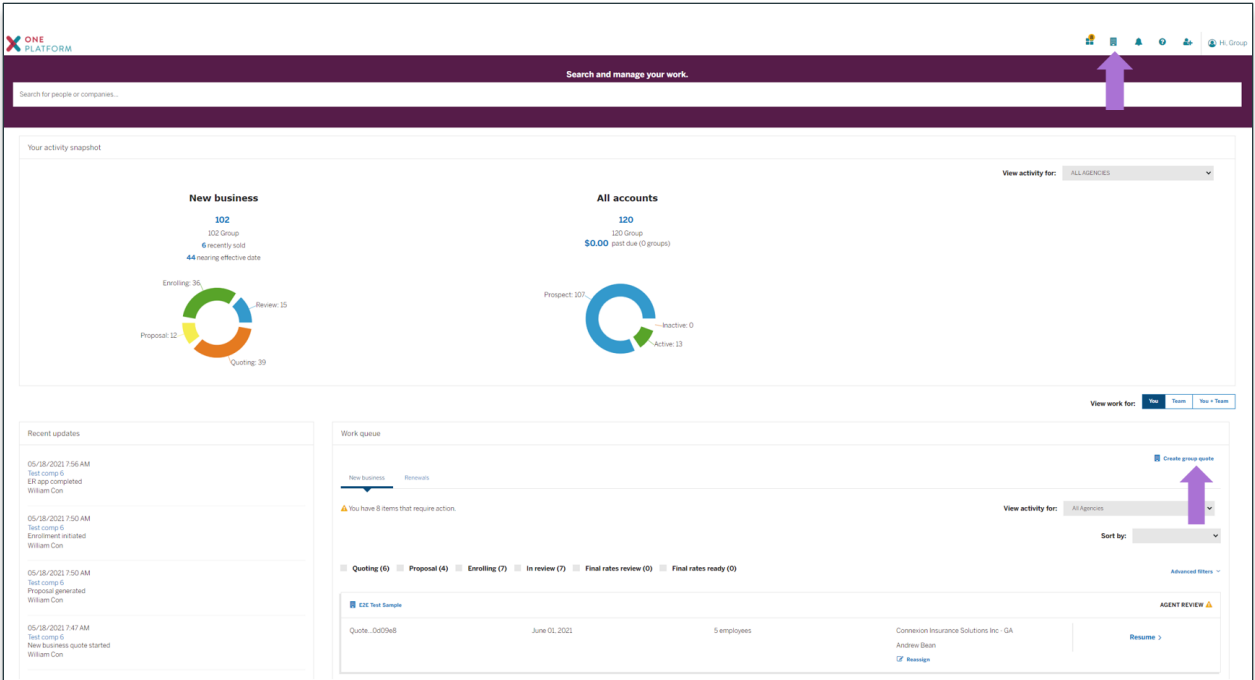
Quote Questions

- Answer the preliminary quote questions and click 'Submit'

Note: Required information is denoted by a red asterisk (*)

Profile

- Enter Profile information and click 'Continue to census' button

Census

- Enter Census information
  - o Enter directly into Census screen

- ■ Click 'Manual entry' button

Add employee

✕

* Indicates required

First name

Middle name

Last name

* Gender

* Date of birth

* Employment

Male   Female

mm/dd/yyyy 📅

Active ⌄

Hire date

Salary

SSN

mm/dd/yyyy 📅

$_.__

___-__-____

Address 1

Address 2

ZIP code

98258   ✕   Lake Stevens,
                              WA (Snohomish)

Home phone

Email address

(__)__-___

Coverage

Medical   **Dental**

EE ⌄   ES ⌄   ⬅

Dependents

👤+ **Add dependent** ⬅   ⬇

                                      Add another employee

Cancel   **Save and exit**

9

- Enter employee information
- If there are dependents, select the appropriate coverage for each product line, click 'Add dependent' and enter dependent information
- Click 'Add another employee' until all employees are entered
- Once all employees have been entered, click 'Save and exit' button

o Import from provided Excel template

- Click on 'Upload census' button
  - Select file

- Click on 'Continue to plans' button

Plans

- Select 'Generate proposal with all plans' link if you wish to download proposal data and then select Excel or PDF format

- If you wish to Compare plans side by side, select the desired plan(s) to compare by checking the 'Compare' button for up to 3 plans and click on 'Compare # plans' button

- You can choose to add plans from the Compare plans page by clicking 'Add to quote' and then 'Continue to proposal' if desired
- Click 'Back to plans' link

- Click 'Add' button for each desired plan for the initial product line

- If additional product lines were selected, click the tab for each product line, review and compare plans
- Click 'Add' button for each desired plan(s)

- Once all desired plans are selected for all product lines, click 'Continue to proposal' button

Proposal

- Click 'View plans in quote' to view selected plans in a pop-up modal
- Click 'Generate plan comparison' to download an excel spreadsheet of all selected plans

- Enter email address(es) if selecting to 'Send proposal'
- Click 'Generate proposal' button to preview the proposal or click 'Send proposal' button to email the proposal
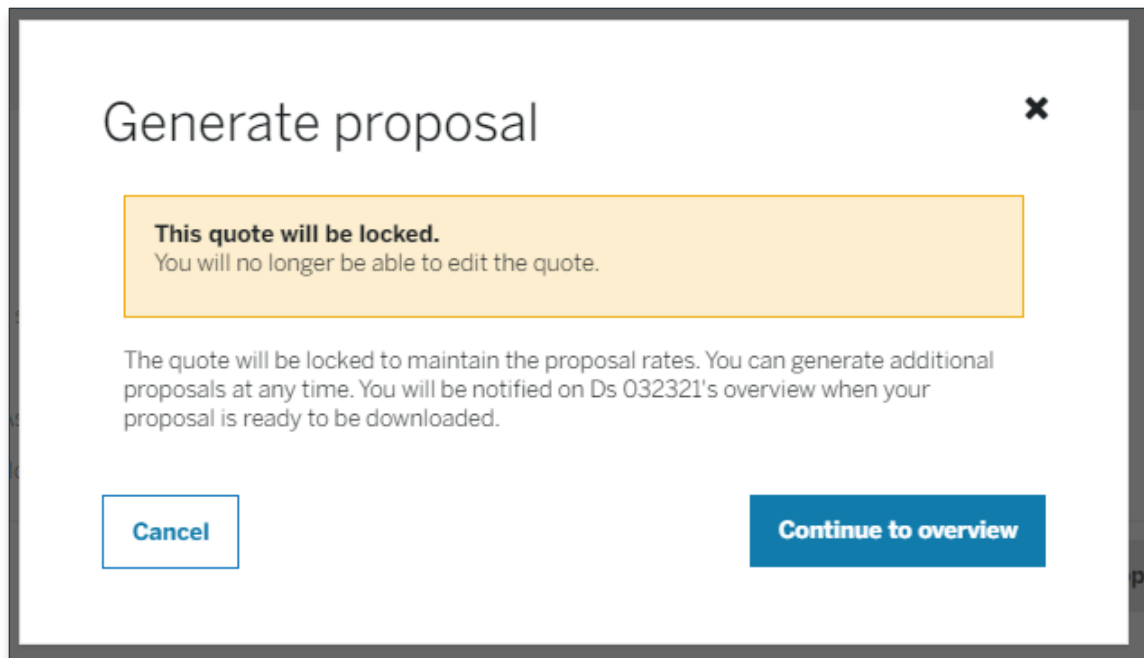
- Click 'Continue to overview'

Overview

- Click 'Download proposal' button

- The downloaded proposal is displayed and accessible

Find an Existing Group

- Case Search
    - Enter your search criteria within the 'Search for people or companies' input at the top of the Dashboard page
    - Select the desired case from the search results displayed
- Dashboard
    - Click on Dashboard in the global navigation on top right
    - Select desired New Business quick filter option(s)
        - Quoting
        - Proposal
        - Enrolling
        - In review
        - Final rates review
        - Final rates ready
    - If the case is not displayed, you can click the 'Advanced filters' link to narrow your list
    - Once the case is displayed within the Work queue, click the 'Resume' link

Edit an Existing Quote

If the quote has not had a proposal generated, you can return to the quote to view, make changes and / or complete the quote.

- If accessing from the Case search, select the case name
- If accessing from the Work queue, click 'Resume'
- The Profile page will display, allowing you to progress through the flow making any desired changes.
- If you access the quote and the page is read only, a proposal was already generated which locks the quote. You can utilize the Copy quote feature if you wish to make changes.

Copy Quote

Once proposals are generated, the quotes will be locked but you can choose to copy the quote and make changes to the copy.

- Access the Overview page by searching for the case through Case Search
- Click the menu option and select 'Copy quote'
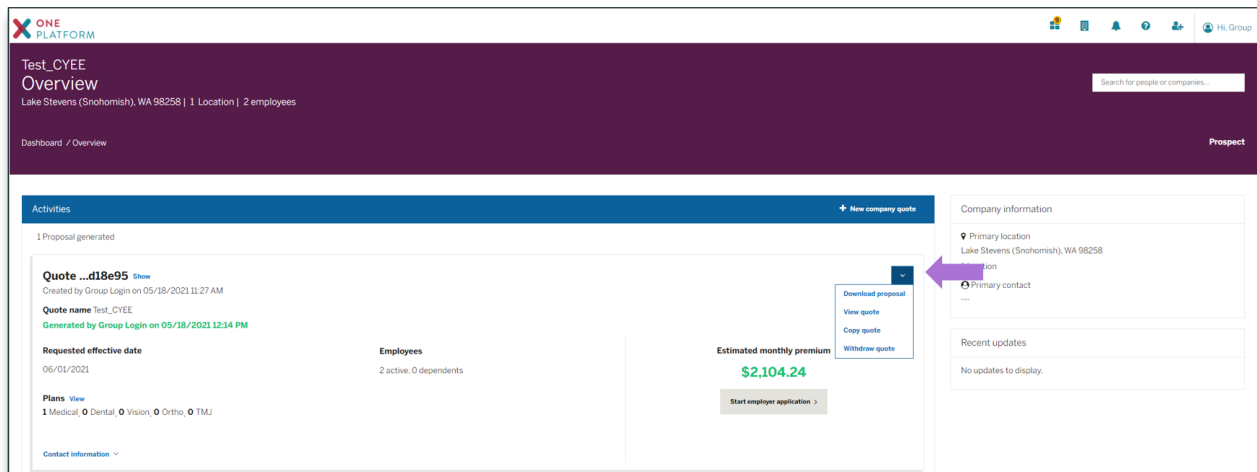
- The Profile page will display allowing you to make any desired changes. The Requested effective date field and desired plans will need to be selected but all other fields will be prefilled with the data from the original quote.

Initiate Group Enrollment

- Access the Overview page for the desired quote

- Click 'Start employer application' button

- 'Edit' each employee to complete required fields for initiating enrollment. Fields required for enrollment that were not required in quoting include:
    - First name
    - Last name
    - Hire date
    - SSN
    - Address1
    - Home phone
    - Dependents First name
    - Dependents Last name
    - Dependents SSN

Employee

✕

* Indicates required

* First name

John

Middle name

* Last name

Smith

* Gender

Male | Female

* Date of birth

07/09/1962 📅

* Employment

Active ▾

* Hire date

01/01/2018 📅

Salary

$100,000.00

* SSN

444-11-7777

* Address 1

7001 220th St SW

Address 2

* ZIP code

98043 ✖ Mountlake Terrace, WA (Snohomish)

* Home phone

(555) 555-5555

Email address

test@premera.com

Coverage

Medical

EE ▾

Dental

EE ▾

Cancel

Save and exit

- Click 'Save and exit' to return to the census
- Repeat editing each employee, completing required fields
- Additional options available

- Employees can be added by clicking the 'Add employee' link from the census
- Employees can be removed by clicking the 'Remove' link for the desired employee
- If you wish to export the census and make changes externally, from the Enrollment census page
  - click 'Export census'
  - the current census data will be exported in Excel
  - open the template, update applicable information and save the spreadsheet
  - click 'Replace census' and import the updated spreadsheet

- Once all employees are complete, click 'Continue to plan offerings' from the census page.

    Note: if there's only one product/plan, it will default to selected

- Click 'Add' for each desired plan to enroll and click 'Continue'

- Once all desired products/plans have been selected, click 'Continue'.

Complete Employer Application

- Initiate the enrollment process by completing steps defined within 'Initiate Group Enrollment'

Profile

- You can enter a unique billing address if desired by unselecting the 'Billing address is the same as primary address'
- You can enter a unique billing contact by unselecting the 'Billing contact is the same as group contact'
- Complete all required and desired fields on the Profile page and click 'Continue to eligibility' when complete

Eligibility

- Enter required eligibility fields and click 'Continue to contributions'

Contributions

- Enter required contribution fields and click 'Continue to current coverage'

Current Coverage

- Enter required fields for current coverage and click 'Continue to Federal requirements'

Federal Requirements

- Complete required fields and click 'Submit and continue' button

Submit Application

- Click 'Submit application'

Manage Enrollment

- Initiate the enrollment process by completing steps defined within 'Initiate Group Enrollment'
- Once the employer application has been submitted, you'll be returned to the Overview page.
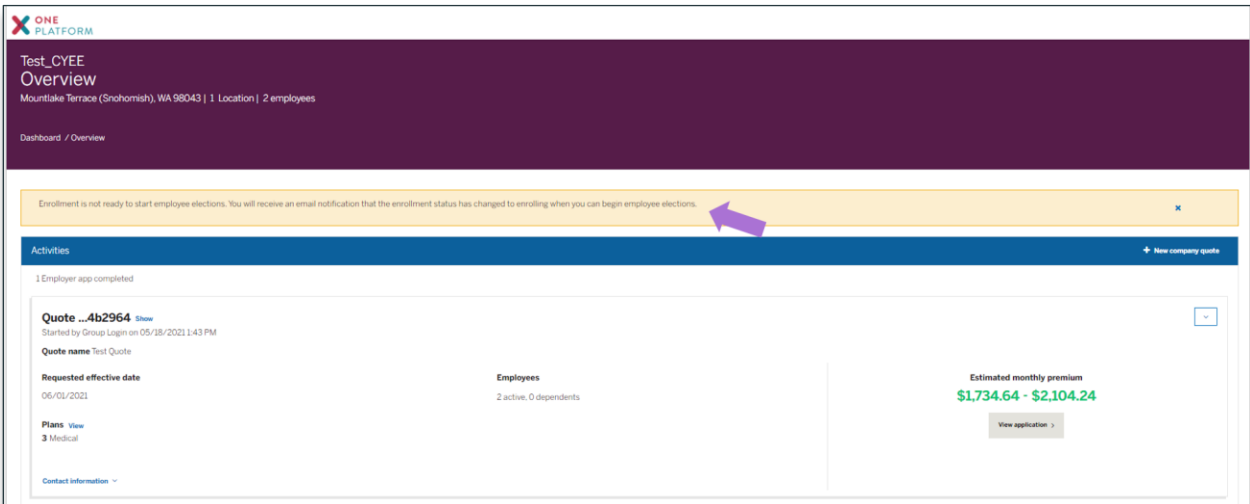
- After a short time, the page will refresh, indicating the employer application has been submitted and you can start enrolling the employees.

- You can choose to View details of any selected plan, Upload documents or Manage enrollment.
- Click 'Manage enrollment' link to access the manage enrollment page the group

Enrollment Center / Home
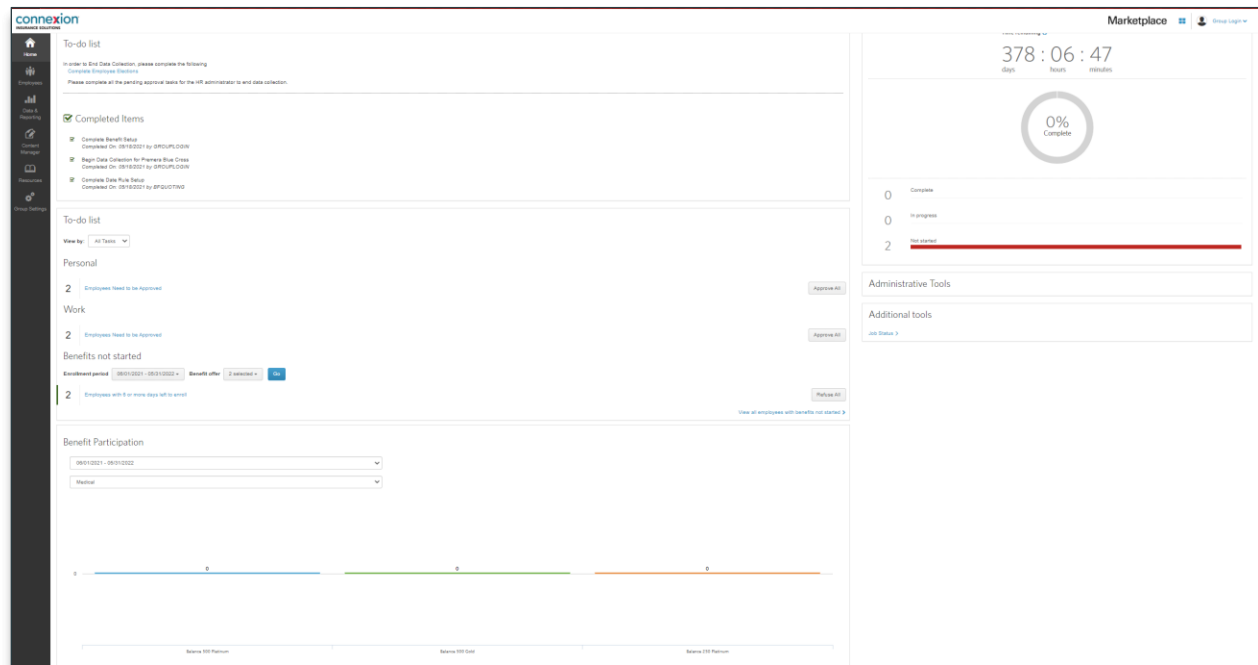
- The Enrollment Center or Home page is the access point for employee enrollment data

- You can view 'Completed Items', To-do list', 'Benefit Participation', 'Export' participation information, 'View all employees', 'Add a new employee', and the percentage of completion is shown within the 'Open Enrollment progress' section.

Employee Enrollment

- Click the 'Complete Employee Elections' link or 'Employees' icon in the left nav

Employee Census

Employee Overview

- Select the desired Action or click the employee name you wish to edit.

- If there's any Personal/Business information requiring approval, review information and 'Approve'

- Click 'Start' to review / select desired benefits

Benefit Details

- Make desired benefit selections and click 'Next'

- Select desired Coverage Level and select 'Next'

- Confirm information and click 'Next'

- Review information on the Benefit Details page and click 'Save'

- Continue thru each product line; selecting desired plans / coverage level or to decline coverage

- Once all product lines are complete, the Benefit Details page will display showing all selected plans, premium breakdown, coverage level and persons covered

- Select Edit for any information that needs to be modified

- If all benefits for the employee have been completed and is accurate, click the 'Employees' icon in the left nav

- Repeat for each employee you're making elections for

- Click 'Return to Home' or the 'Home' icon in the left nav

End Data Collection
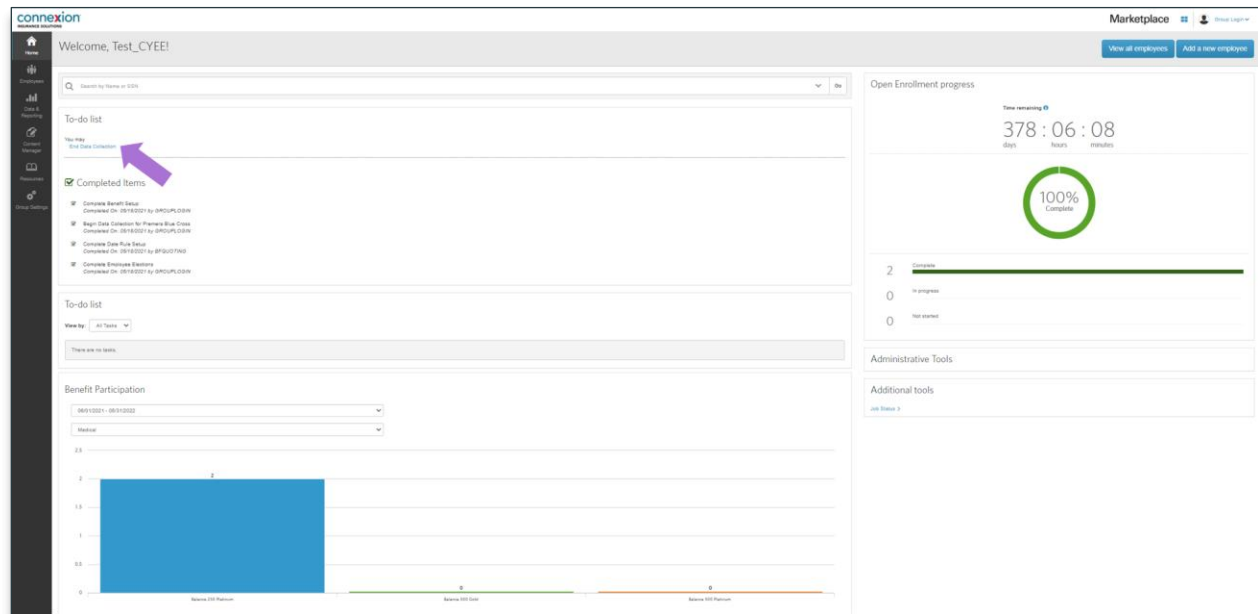
- Click 'End Data Collection'
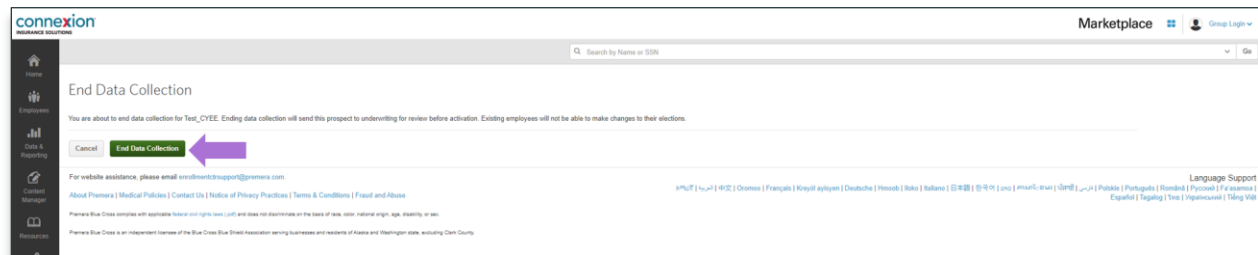
- Click 'End Data Collection'

Upload Documents

- Upload any remaining documents by clicking on the 'Upload documents' link and the 'Select file' for the document you wish to upload.

Submit Enrollment

- Once all documents are uploaded, click 'Submit enrollment'

Group Agreement to Contract

- Click the 'Accept and continue' link to access the Group Agreement to Contract

- Click the 'Continue to signature' button

- Click the check box acknowledging a wet signature has been received, click the 'sign on behalf of' field to electronically sign and click the 'Sign application' button

- The enrollment has been submitted for review. You will receive an email once the underwriter has accepted or declined the enrollment.
- Status of the activity is updated to 'Submitted for review'