Quoting New Business



- First of the month effective dates only
- Deductible credit is available; but out-of-pocket credit is NOT available
- **ENHANCEMENT!** New sales paperwork due by the effective date (General Agents have up to the 8th of the month)



Submit quote request through eSales Small Group Quoting Tool 2

Required docs:

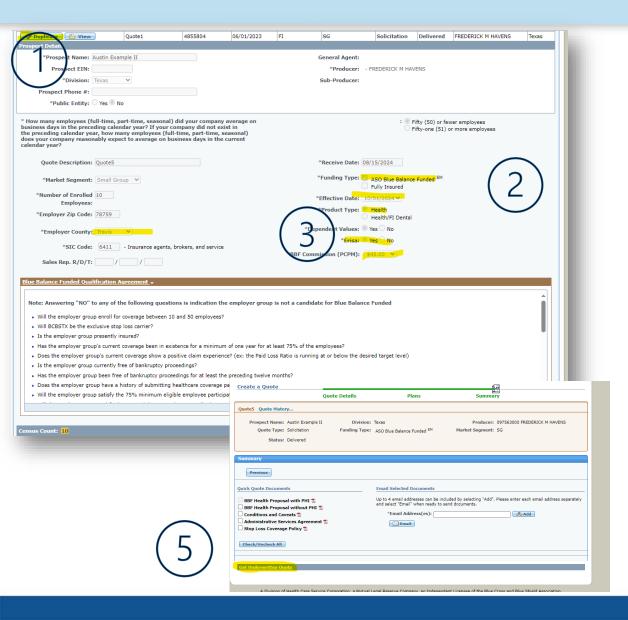
- Request for Proposal (RFP) form
- Current Member Level Census (Smart Census Template)
- Current and renewal rates from current coverage
- Current SBC
- Report of billed dollars, claims dollars and medical conditions (as applicable)
- · Identify commission rate

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Submit by
effective date
to enroll a group
using the
Enrollment Tool

Quoting Steps

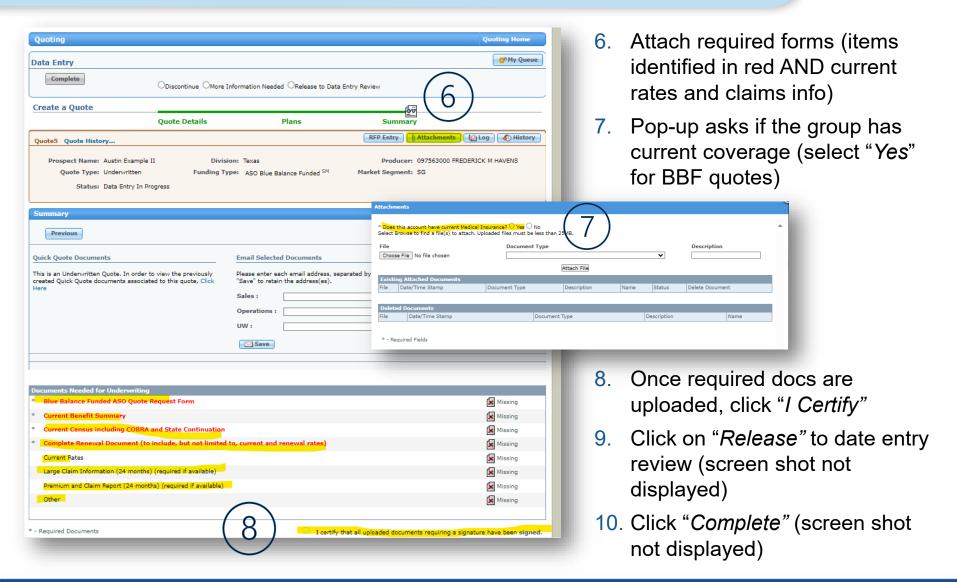




- If a Fully Insured quote has already been created. Click "Duplicate".
- 2. Select "ASO Blue Balance Funded" for Funding Type
- Complete all blanks (including Commission), click "Save" and "Continue"
- On the next screen, click "Generate Proposal" (screen shot not displayed)
- 5. Click on "Get Underwritten Quote", "Save" and "Continue"

Quoting Steps





Enrolling a Group



- Begin enrollment using quoting case number
- Use Enrollment Tool to submit paperwork:
 - Administrative Service Agreement (ASA)
 - Benefit Program Application for ASOs (BPA)
 - Stop-Loss Coverage Policy and Application
 - Business Associate Agreement (BAA)
 - Employee Enrollment Application / Census
 - Proof of Wages / Proof of Business
 - Employer Group Information (EGI) Form
- Enrollment may take up to 18 days
- Expect processing delays if paperwork is missing or incomplete
 - Email will generate identifying reason code for required information
 - Login to eSales to view exact request
- System generated welcome letter



Paperwork **no longer requires** the group's account / group / or section numbers in order to complete submission.



Proof of Wages must be reconciled for ALL employees (FT / PT / Seasonal / etc)