eBroker User Guide- Quick Start on

How to Request a Quote

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Purpose

The purpose of this user guide is to give you an overview of how to request a quote in the eBroker tool.

Request A Quote

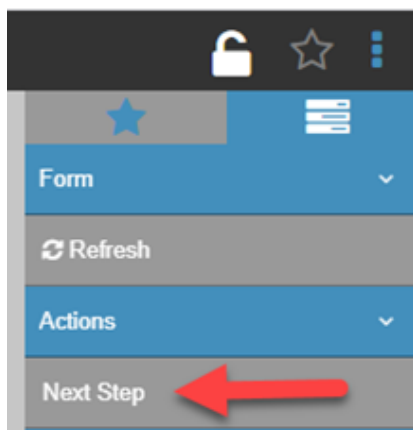Sign into the broker portal.

Click on the eBroker link. It would be labeled **Employer-Sponsored Business**
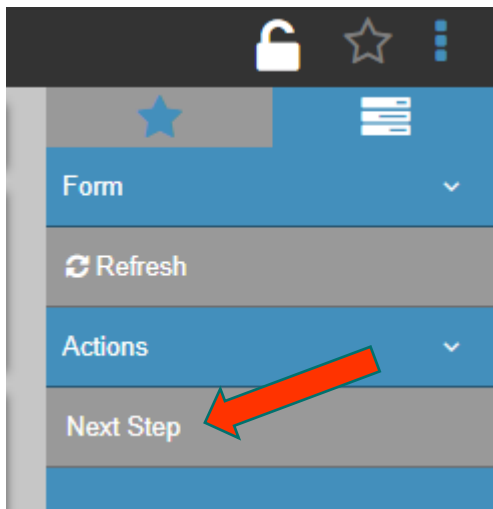
To create a new quote, in the left navigation bar, click on **Quotes** then **New Quote**.
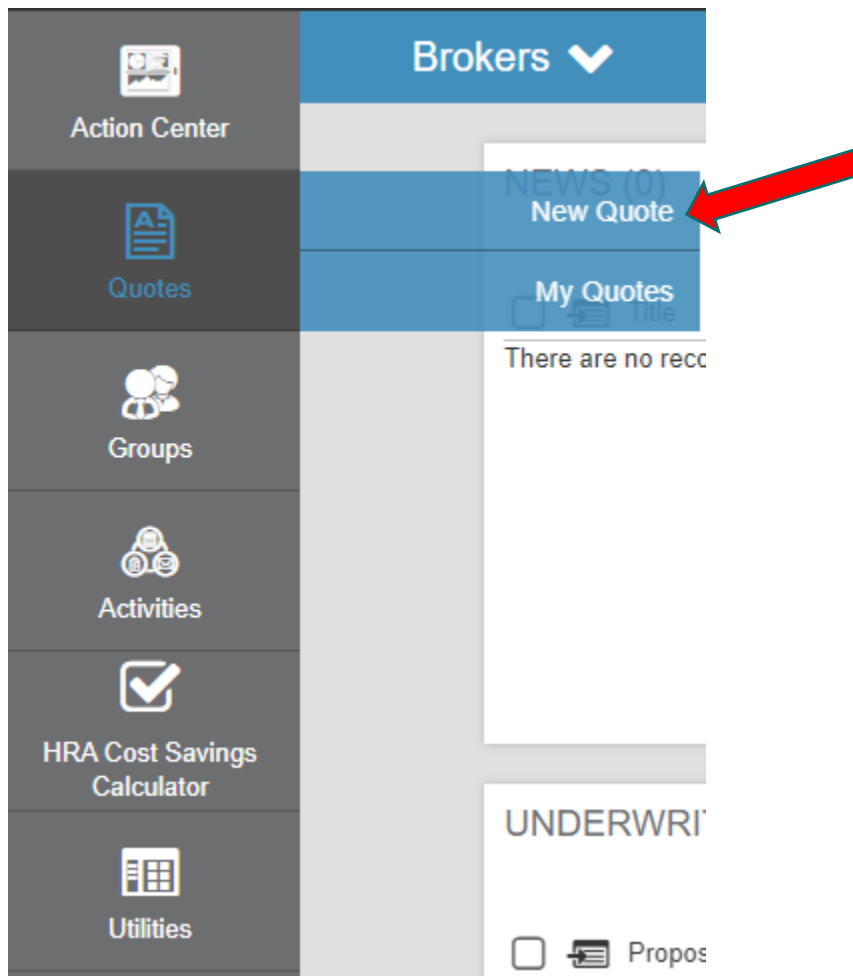
Click on **Next Step** after all the required information on the new quote screen is filled out.

Click on **Next Step** to bypass the optional fields and go to the census page.
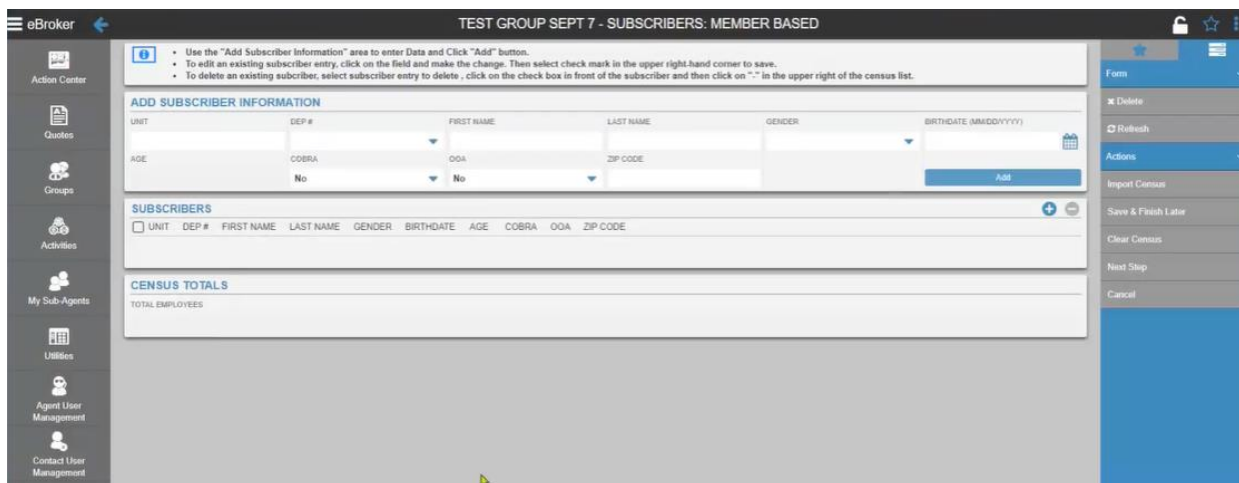

On the census page, you have the ability to add subscribers, one at a time on the screen, or the ability to import a census.

For small group census (2-50 members) functionality requires that every person receiving coverage (Subscriber, Spouse, and Dependents) must be included in the census. For each member, the following data is required, unless noted as optional (shown below in the order presented in the sample screen shot for a manually entered census):

- **Unit#** -- This is used to identify members who are related and covered as a unit (i.e., the employee and any related spouse/dependents). Each subscriber/employee and any related dependents must be assigned one Unit#, even if the employee is covering only himself. The first employee and all of his spouse/dependents would have a Unit# of 1, the second employee and all of her spouse/dependents have a Unit# of 2, etc.)

- **Dep#** -- This is used to identify all members within a Unit. The employee always has a Dep# of 01 and is required;
  02 = Spouse; 03….06 etc. = Dependents. If there is no Spouse, skip "02". The first child Dependent is always 03. *Please see the screen shot below for an illustration of how the Unit# and Dep#s are assigned to a family.*

- **First Name**

- **Last Name**

- **Gender –** Enter Male or Female

- **Birthdate –** Enter as xx/yy/zzzz

- **Age** (<u>Optional</u>)

- **COBRA** – Enter Yes or No

- Out of Area ("**OOA**") – Enter Yes or No

- **Zip Code** ("Zip"; this field is <u>Optional</u>)

- All fields are required, <u>except</u> Age & ZIP code.

The format to import information is shown below:

First_Name	Last_Name	Gender	Birthdate	Age	COBRA	Out_of_Area

OHP_Unit_Number	OHP_Dep_Number	Zip

The headers must be spelled the same way and in the same order as above. Underscores shown above are required.

- Data in <u>all</u> fields is required, except Age and Zip which are optional.
- Excel files must be saved in a comma-delimited <u>CSV file format</u> in order to upload.
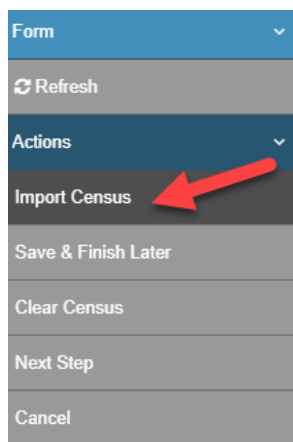
For Mid-market groups

- To manually enter a census fill in the same information as above into the fields on the screen, then hit **add**. Repeat this step for each member.

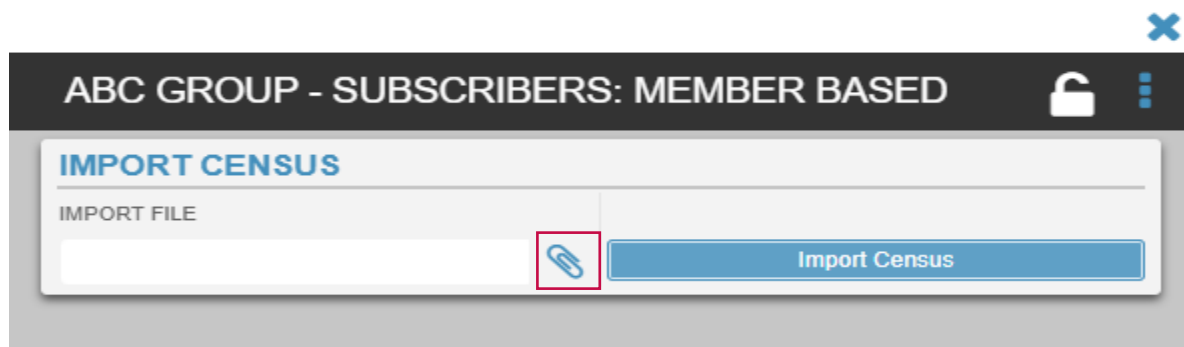To import a census. Click on **import census**

Click on the **paper clip icon**

The format that should be used on all imported files is CSV (Comma Separated Values) type files. Here is the order to be used:

[First_Name, Last_Name, Gender (Male or Female), Birthdate (format: MM/DD/YYYY), Spouse (Yes
or No), Children (# of), COBRA (Yes or No), OOA (Yes or No), ZIP (5 digits), Product_Line (optional)]

A file can be imported without a First Name or Last Name (but leave the "space" for those values in the spreadsheet) and Age (this will be auto calculated based on the DOB)
First_Name,Last_Name,Gender,Birthdate,Age,Spouse,Children,COBRA,Out_of_Area,Zip, Product_Line
,,Male,7/13/1971,,No,0,No,No,22923,2800
,,Female,12/23/1980,,No,0,No,No,22911,2800
,,Female,4/25/1966,,No,0,No,No,22901,E3000
,,Male,5/27/1977,,No,0,No,No,22901,2800
,,Female,2/25/1961,,No,1,No,No,22911,2800
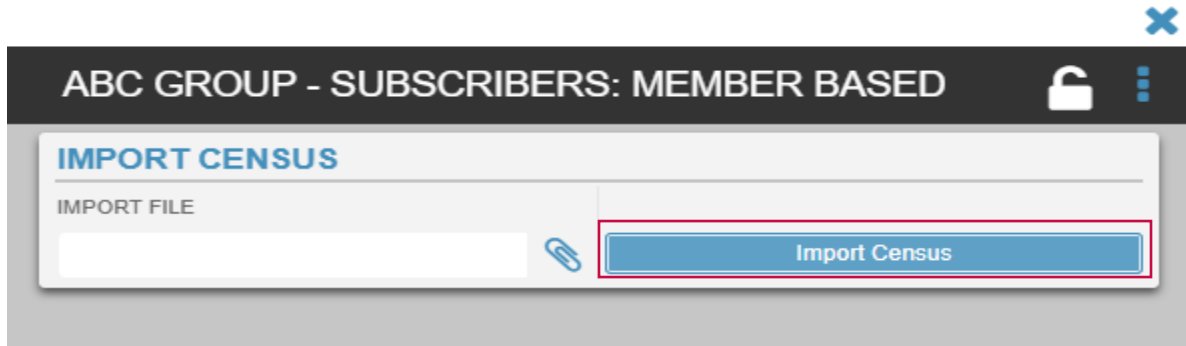**,,Female,1/12/1991,,No,0,No,No,22942,E3000**

OR

A file can be imported with just the age missing (this will be auto calculated based on the DOB)
First_Name,Last_Name,Gender,Birthdate,Age,Spouse,Children,COBRA,Out_of_Area,Zip, Product_Line

Anna Marie,Amgi,Male,7/13/19XX,,No,0,No,No,22923,2800

Carol Ann,Bag,Female,12/23/19XX,,No,0,No,No,22911,2800

Brenda Mae,Blak,Female,4/25/19XX,,No,0,No,No,22901,E3000

Tammy C,Bro,Male,5/27/19XX,,No,0,No,No,22901,2800

Mary Ellen,Dan,Female,2/25/19XX,,No,1,No,No,22911,2800

Ashley Danielle,Eva,Female,1/12/19XX,,No,0,No,No,22942,E3000

add your census and then click **Import Census**

If all of your records were imported then they will show up in the census in eBroker

If some or all of your records fail to import you'll need to open the CSV file in notepad to look at where the commas are in the file

On the Plan Selection page is where Plans are selected for quoting. Select the plans to be added to the quote. Drill down the desired plan family and check the box on the right side of the screen.
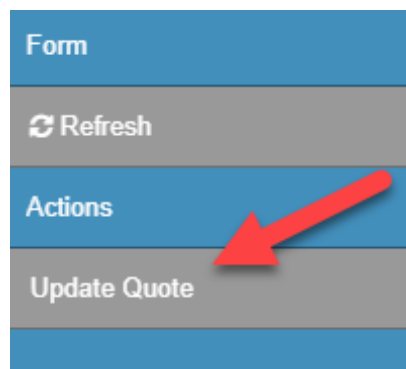

For mid-market groups select the pharmacy options for each plan, small group quoting skips this step.

After all the desired plans are selected, click **Update Quote** on the right menu.


After selecting the plans you will be redirected back to the main group page. Calculate Rates is on the main group screen.

At the bottom of the page, you will see the selected plans.

- CON (contract) checkbox is checked if the quote is for that contract year. If the quote is for calendar year, then the box will not be checked.
- When PROP (proposal) is checked then the plan will show up on the printed proposal. Uncheck the PROP box to remove a plan from the proposal.
- When COMP (comparison) is checked then those plans will be available to compare in the printed proposal.

Click on the **Calculate Rates** on the right-side menu to calculate the rates. This will generate the rates. Rates should be calculated before printing the proposal.
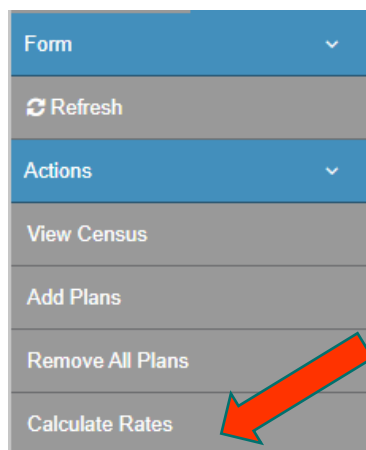
NOTE: for small group this can be done immediately, for mid-market the quote must be underwritten 1st before this is available.

Click Print to go to the print options screen.
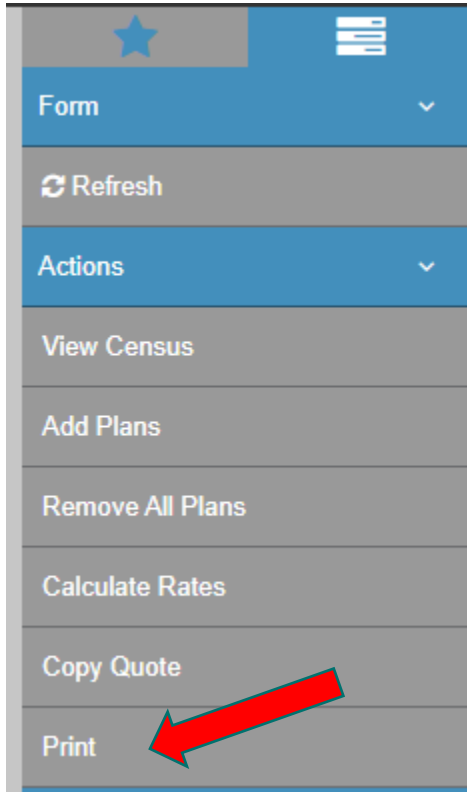
Print Menu has many options to consider before printing. Select desired options and click **print.**