QuoteNow guide

Thank you for quoting business with Fallon Health. There are **three ways to generate a quote in QuoteNow :**

1. To generate a quote-small group

Step 1 | Create
- Select Quote-Small Group from drop down, then select "Create New Opportunity"

Step 2 | Enter basic information *(all information below is required)*
- Opportunity Name
- Account – Select from drop down
    - If Account does not exist
    - Select + Create new account
    - Provide Account name, select Fallon Sales Representative, enter SIC code
- Owner – Which is the Opportunity Owner/Created By
- Sales Representative, Effective Date, ZIP Code

Step 3 | Update company information
- Review all address information that populates and update accordingly
- ZIP Code populates the City and State fields *(required)*
- Press Next

Step 4 | Create opportunity – capture census
- You can create census one member at a time:
    - Select Manual Entry
        - Enter Census Name *(required)*
        - Use the "+" button to add subscribers
        - Add dependent information in pop up when selecting proper coverage for subscriber
        - Use the "+" to add dependents in pop up box

OR

Census – Upload
- Select Upload Excel File
    - Enter Census Name *(required)*
    - Select the location of the Excel census template and provide the worksheet name and check off if first row contains column headers
    - Assign the columns on your Excel worksheet
- Press Next

Step 5 | Census – update
- Within the opportunity you can click the "Back" button to update Census

Step 6 | Medical plans
- All available plans will be visible by rate, then select applicable plans and hit "Next"
- Review selected plans, rates and premiums, then press "Next"
    - Please note once "Next" is pressed edits are no longer allowed on the quote

Step 7 | Generate proposal
- Hit "Generate Proposal" and a PDF output of the proposal can be saved to your system

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2. To generate a Quick Quote

Step 1 | Create
- Select "Quick Quote"

Step 2 | Enter basic information
- Customer name; Effective Date, ZIP Code *(required)*
- SIC Code

Step 3 | Create census
- You can create census one member at a time:
  - Select Manual Entry
    - Enter Census Name *(required)*
    - Use the "+" button to add subscribers
    - Add dependent information in pop up when selecting proper coverage for subscriber
    - Use the "+" to add dependents in pop up box

OR

Census – upload
- Select Upload Excel File
  - Enter Census Name *(required)*
  - Select the location of the Excel census template and provide the worksheet name and check off if first row contains column headers
  - Assign the columns on your Excel worksheet
- Press Next

Step 4 | Medical plans
- All available plans will be visible by rate
- Review selected plans, rates and premiums and press "Finish"
  - Please note once "Finish" is pressed, edits are no longer allowed on the quote

Step 5 | Print
- A PDF output of the Quick Quote can be saved to your system

3. To generate an individual quote

Step 1 | Create
- Select "Quote-Individual"

Step 2 | Enter basic information
- Customer name; Effective Date, ZIP Code *(required)*
- SIC Code

Step 3 | Enter applicant information
- Add any dependents if applicable

Step 4 | Medical plans
- All available plans will be visible by rate
- Review selected plans, rates and premiums and press "Finish"
  - Please note once "Finish" is pressed, edits are no longer allowed on the quote

Step 5 | Generate proposal
- Hit "Generate Proposal" and a PDF output of the proposal

Questions?
Call Fallon's dedicated broker line at 1-888-746-4823, or visit our website at fallonhealth.org/brokers.