Roles

Broker

- Search/create company information
- Shows only opportunities/quotes created by themselves/broker admin
- Review the agency data of which they belong to

Broker Admin

- Search/create company information
- Search/create opportunities for all brokers in agency
Hierarchy

• Create/Update Opportunity
• Create/Update Census
• Request Quote
• Proposal Output
Home page

My Work – List of incomplete opportunities created by user
Companies – Companies in your book of business
Accounts – Accounts that you have created opportunities for
Quotes – List of all the quotes you created
Opportunities – List of opportunities you created
Login screen

Brokers will use their existing username and password
Broker login: http://www.fchp.org/brokers.aspx
Home page
QuoteNow

Small group quote
Creating a new small group opportunity

From the “+ Create” menu select “Quote-Small Group”
Creating a new small group opportunity
Defining the opportunity

- If you are creating a brand new opportunity then select “Create New Opportunity”.
- If you are updating an existing opportunity then “Select existing opportunity”
Creating a new small group opportunity

Defining the opportunity

**Name your Opportunity** – This can be named anything that will make identifying the opportunity/quote easy for you.

**Opportunity Owner & Territory ID** – This will default to user info but can be edited if creating on someone’s behalf. Note: Territory ID is tied to the Opportunity Owner and will automatically populate.

**Account** – Fill in the account name. If the company exists it will populate if not you will need to “Create Account” (next Page. “Sales Rep/Acct Mgr” – will automatically populate.

**Employee Information** – Total Full Time Employees and Full Time Equivalents are required fields.

**Required information** – Please fill out any other required information needed for quoting.
Creating a new small group opportunity
Creating an account

When an account does not exist a new account must be created

Create Account – Click the “Create Account link

A pop-up box will appear to create the account. Please note that Sales Rep/Acct Mgr and Territory ID will pre-populate.

Sales Rep/Acct Mgr = Fallon Sales Rep/Account Mgr
Territory ID = Broker

A Broker Admin will be able to select those brokers within their agency.

A Broker will only be able to see themselves in the Territory field
Creating a new small group opportunity

Capture census

You can create census one member at a time or upload a census from excel.
Creating a new small group opportunity

Capture census – manual entry

**Name your Census**

**Use + button to add any Employees**

**Select Contract Type to add dependents**
Creating a new small group opportunity

Capture census – manual entry – adding dependents

Once the appropriate Contract Type is selected a pop-up box will appear to add any dependent information

Use + button to add any dependents
Creating a new small group opportunity
Capture census – upload census

When the “Upload Census” is clicked, the dialogue box to the right will appear.

Select your file, assign the columns, state what row the census data starts on your worksheet.
Creating a new small group opportunity

Capture census – upload census – upload template

*Note, subscriber ID must be unique to each family unit.

Zip code cells must be formatted as text field.
Creating a new small group opportunity
Capture census – upload census – upload template

You will now see your uploaded census in the opportunity. It can be added on to from this screen by clicking + as in previous steps.

The census can be updated anytime before the opportunity is completed by using the back button or clicking the #2 “Capture Census” at the top of the screen.
Creating a new small group opportunity

Select plans

By default all eligible plans will be selected to quote.

Use Filters to minimize searching.
Creating a new small group opportunity

Plan details

Click on Plan Name to get Plan Details

Clicking next will bring you through Plan Details of all plans selected
Creating a new small group opportunity

Compare plans

Compare up to 3 plans with the compare button
Creating a new small group opportunity

Creating quote

- Links to Forms, Benefit Summaries & SBC’s
- Confirm your information and click next to complete the quoting process
Creating a new small group opportunity

Generate proposal

Press Generate Proposal.

Proposal will show up at bottom of screen
Creating a new small group opportunity

Proposal output

PDF proposal:
- HMO
- PPO
- Tiered Choice
- Disclaimer Page

You can save the PDF to your system.
QuoteNow

Quick Quote
Creating a Quick Quote

From the “ + Create” menu select “Quick Quote”
Creating a Quick Quote

Required information – Please fill out any other required information needed for quoting

Update Census follow these steps
Creating a Quick Quote

Confirm your information and click next to complete the quoting process.

Links to Forms, Benefit Summaries & SBC’s
Creating a Quick Quote

Press Print to generate Quote

Quote will show up at bottom of screen
QuoteNow
Quick Quote to quote conversion
When you are ready to move your Quick Quote to the next step and create a full proposal, you can do that by clicking “Convert to Regular Quote”.
Converting Quick Quote to quote

The opportunity will need to be edited as it has no customer information. Click "Edit"
Converting Quick Quote to quote

**Account** – Fill in the account name. If the company exists it will populate if not you will need to “Create Account” (right). “Sales Rep/Acct Mgr” – will automatically populate.

When an account does not exist a new account must be created

**Create Account** – Click the “Create Account link

A pop-up box will appear to create the account. Please note that Sales Rep/Acct Mgr and Territory ID will pre-populate.

- **Sales Rep/Acct Mgr** = Fallon Sales Rep/Account Mgr
- **Territory ID** = Broker

A Broker Admin will be able to select those brokers within their agency.

A Broker will only be able to see themselves in the Territory field

**SIC lookup tool**
Converting Quick Quote to quote

Select plans

By default all eligible plans will be selected to quote

Use Filters to minimize searching
Converting Quick Quote to quote

Creating quote

Links to Forms, Benefit Summaries & SBC’s

Confirm your information and click next to complete the quoting process.
Converting Quick Quote to quote

Generate proposal

Press Generate Proposal.
Proposal will show up at bottom of screen
Converting Quick Quote to quote
Proposal output

PDF proposal:
- HMO
- PPO
- Tiered Choice
- Disclaimer Page

Test Account

You can save the PDF to your system.
QuoteNow
Individual quote
Creating an individual opportunity

From the “+ Create” menu select “Quote - Individual”
Creating an individual opportunity

**Required information** – Please fill out any other required information needed for quoting

**Enter Applicant Info**

**Add any Dependents**
Creating an individual opportunity

By default all eligible plans will be selected to quote

Use Filters to minimize searching

Confirm your information and click Finish to complete the quoting process

Plan type: Medical
Medical plan type:
- HMO
- PPO

Plan Network:
- Direct Care
- Select Care
- Preferred Care

Plan Design:
- Copay Only
- Deductible
- Qualified High Deductible (QHD)

Office Visit
- Preventive: $15
- Urgent Care: $100
- Specialist: $150

Deductible
- Ind/Fam: $1,000/$2,000
- Individual: $1,000

Prescriptions Retail:
- $50/$100

Total Monthly Premium:
- $543.82
- $542.58
- $673.83

Total Annual Premium:
- $6,510.96
- $8,085.96
- $9,188.16
Creating an individual opportunity

Press Generate Proposal

Proposal will show up at bottom of screen
Questions?