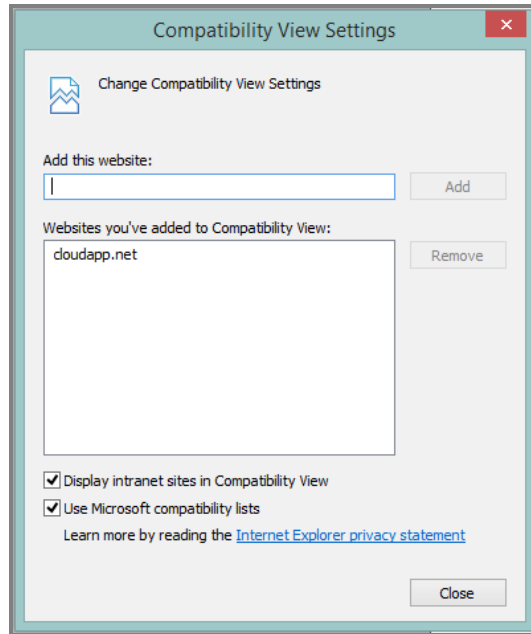
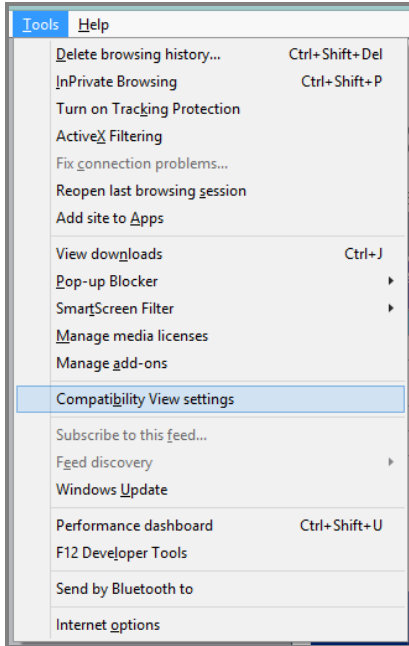


One, Mississippi Quotation System Help

<u>Before you Begin</u>	2
<u>Register</u>	2
<u>Log In</u>	3
<u>Running a Quote</u>	3
<u>Adding Census Data</u>	4
<u>Running the Quote/Viewing the Qualifying Plan Rates</u>	5
<u>Viewing/Emailing/Printing the Proposal</u>	5
<u>Viewing/Printing the Final Rates</u>	6
<u>Clearing Final Rates</u>	7
<u>Additional Functions</u>	7

Before you Begin

Please note, there are known compatibility issues with Internet Explorer 10/11. If you are running IE10 or IE11, you will need to add the site to your Compatibility View list to run a quote. To add the site to Compatibility view, from Internet Explorer 10/11, you must be at the Group Health Login Screen. From there, press Alt-T to open the Tool menu and then click Compatibility View settings (shown below, left). The Compatibility View Settings window will appear with the current website in the “Add this website” field. Click the Add button and the site will be added to the list of websites using Compatibility View (shown below, right). Click the Close button to return to the Login page.



If using a Chrome browser, please update to the most current version by choosing **About Google Chrome** from the Chrome menu, which will automatically launch the update process.

Depending on your browser, the Proposal and Final Rates Report will either open in a new popup window or new tab. You may need to allow popups from this site to view the report.

Register

Before accessing the quoting system, you must register for an account. Click the Register button to begin this process. All non-optional fields must be completed.

Marketplace User Name: This is the username previously registered to use with the One, Mississippi website.

License #: This is your state of Mississippi Health Insurance License number.

NOTE: The optional fields on this form are displayed on the Proposal report

After completing the form, click the Create User button and the account will be created. You will be returned to the Log In screen and a notification will indicate that the account is activated.

Log In

From the Log In screen, enter your email and password. If you have forgotten your password, it can be recovered by clicking the recover password link on the Log In page. Upon entering your email address, license # and clicking Submit, you will be sent an email with your current password.

WARNING: For security purposes, the system will automatically log out after 20 minutes of inactivity. No data will be lost. If you are away from your computer for an extended period of time, the screen will still be open where it was left, but clicking any link or button will return you to the Log In screen. Log back in with your credentials and continue where you left off. Because the screen will not refresh to the log in screen as part of the auto-login process, it is recommended that you logout if you know you will be away for an extended period of time.

Running a Quote

To begin a new quote, click the Add Company button. Several fields are required to run a quote, and are marked by a red asterisk.

Add Company Save Changes Cancel Changes Delete Company Copy Quote Download Census Upload Census Run Quote Final Rates							
Quote ID	51	Address 1	123 Main Street	Phone	662-555-1111		
Effect Date	11/01/2014 *	Address 2	Suite B	Fax	662-555-1212		
Company Name	Company A *	City	Ashwood	Email Address	JoeBlack@CompanyA.cc		
Reference Plan	UnitedHealthcare Silver	County	Wilkinson *	Date Time Created	09/29/2014 5:03 PM		
Metal Level	Gold <input type="checkbox"/> Silver <input checked="" type="checkbox"/> Bronze <input type="checkbox"/>	Zip Code	39669 *	State	MS	Date Time Last Modified	09/29/2014 5:13 PM
Employer Contribution	EE% 50 Dep% 0	Primary Contact	Joe Black				

Example of a completed Quote Specification form

NOTE: Use the TAB key to move through the data fields in the preferred order.

The Effective date: By default, is set to the 1st day of the 2nd month from when a quote is run. For example, if a quote is run on June 8, the default effective date will be August 1.

Reference Plan: The reference plan is the plan chosen by the Employer against which the cost of other plans will be compared to determine the employee cost. You may choose either “No reference plan” to quote all plans (which is for illustration purposes only and will disable the proposal features) or choose a reference plan from the list, which will quote that plan and all plans in the same metal level. The reference plan will appear in bold on the Qualified Plan list, and the employee and dependent costs will be adjusted based on the cost of the reference plan. If quoting “No reference plan” you may narrow the results by selecting only the desired metal level(s).

Employer Contribution: These fields define what percentage of the premium is paid by the employer towards the employee coverage and/or dependent coverage. Enter the percentage as a whole number (i.e., 80% should be entered as “80” not “.8”).

Zip Code: The County field is determined by the Zip Code. Enter the Zip Code first, hitting the TAB key after entry, to auto-fill the County (County pull down list will offer all available counties based on the specified Zip Code, and correct County can be chosen from the list if the default is incorrect).

When the quote criteria have been set, click the Save Changes button to add employee(s).

Adding Census Data

To add census data to the quote, you may either upload a census or manually enter the employee information.

To upload a census, you will need to first download (using the Download Census button) and populate the Census Template. After the template is complete, click the Upload Census button. On the census upload screen, begin by browsing to the file location and after selecting the file, click the Upload button. After the census data has been imported, you will be returned to the Quote Specification screen.

NOTE: The file must be a .xlsx file type (Excel 2007 or later). The worksheet containing the census data must be named “Census,” and required fields must contain entries (and must be correct format per the column header) or those records without will not be imported. The required fields are Employee ID and Employee DOB.

The other option for entering Census data is manual data entry. There are several required fields for each Employee, also marked by a red asterisk.

	Employee ID	Employee DOB (mm/dd/yyyy)	EE Age	Spouse DOB (mm/dd/yyyy)	SP Age	# of Children 0-20	Child DOB (21-25) (mm/dd/yyyy)	Age	Child DOB (21-25) (mm/dd/yyyy)	Age	Child DOB (21-25) (mm/dd/yyyy)	Age	Child DOB (21-25) (mm/dd/yyyy)	Age
Edit Delete	SB033	12/27/1971	42	07/22/1958	56	2								
Edit Delete	DP058	06/20/1958	56	10/07/1959	55	1	02/07/1987	27						
Edit Delete	KC007	06/12/1962	52											
Edit Delete	AF220	01/26/1973	41			1								
Save & Add	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

Please note: Age or DOB is calculated based on the Effective Date.

Example of a completed Census form

Employee ID: A unique identifier that does not contain personally identifying information such as first and last name or SSN. This field has a maximum of 5 characters.

DOB or Age: You may enter either Date of Birth or Age and the other will be calculated based on the Effective Date specified on the Quote Specification form, when the Save and Add link is clicked. If Age is entered, the DOB will be calculated (based on Effective Date) as the first day of the current month of the calculated year.

Spouse DOB/Age: If a Spouse will be covered, input their DOB or Age, just as for the Employee.

of Children 0-20: Input the total number of children age 20 or younger in this field.

Child DOB (21-25): For coverage of up to 5 children between the ages of 21-25, enter the DOB or Age (just as for Employee) for each child. Use the scroll bar to scroll to the right to add the DOB/Age for each additional child.

After data is entered, click the Save & Add link to save the current employee (and add a new if there are more employees to add). If an employee’s entry needs to be changed, click the Edit link next to the employee. The record will turn green, at which time you can edit any fields and click the Update link to save, or Cancel link to return the record to the previous state. If an employee needs to be removed from the quote, click the Delete button. You will be prompted to confirm the deletion. Continue to Save & Add until all Employees have been added.

Running the Quote/Viewing the Qualifying Plan Rates

When all employees have been added, click the Run Quote button to generate the list of qualifying plans and their rates.

Upon clicking the Run Quote button, a list of Qualified Plans will appear with the Rates Details. The Reference Plan appears in bold. The qualifying plan list provides the total Employee cost, total Dependent cost and total Employer cost (based on Employer/Employee contribution percentages and reference plan cost) for each plan. To view the breakdown by employee for a specific plan, click the Select link next to the Plan ID and the Rates Details will appear to the right.

Qualified Plans: 4									Rates Details				
Rate Details?	Plan ID	Carrier	Plan Name	Metal Level	EE Cost	Dep Cost	Employer Cost	Total	EE ID	EE Cost	Dep Cost	Employer Cost	Total
Select	6	UHC	UnitedHealthcare Bronze 6250	Bronze	618.42	1626.71	761.02	3006.14	SB033	118.55	719.06	145.89	983.49
Select	4	UHC	UnitedHealthcare Bronze HSA 5000	Bronze	645.65	1658.82	761.02	3065.48	DP058	208.74	780.92	256.87	1246.52
Select	11	UHC	UnitedHealthcare Bronze Navigate 5000	Bronze	670.6	1688.25	761.02	3119.86	KC007	174.65	0	214.92	389.56
Select	1	UHC	UnitedHealthcare Bronze 4500	Bronze	761.02	1794.87	761.02	3316.9	AF220	116.49	126.73	143.35	386.57

Example of a Qualified Plan List

Viewing/Emailing/Printing the Proposal

The proposal is made up of 6 sections:

- Cover Page – contains company name, preparation date and disclaimer information
- Census Page – contains census information for all employees, with effective date and specified quote option as well as a list of all census data that will be required to enroll in a plan.
- Employee Options – contains all plans with rates for each employee. This can be given to the employee to compare costs and indicate via checkbox which plan they would like to select.
- Cost Comparison – contains all plans with rates for the entire group, broken down by employee cost, dependent cost and employer cost.
- Premium Details – contains rate for each employee by plan, broken down by employee cost, dependent cost and employer cost.
- Benefits – benefit sheet provided by the carrier, for each plan.

Each section can be selected to appear in the proposal by checking the appropriate checkbox in the Generate Proposal area (by default, all sections except Benefits are selected). To view the proposal, click the View button. The proposal is presented in Adobe PDF format and can be saved or printed by moving the cursor to the bottom of the page and selecting the appropriate Acrobat icon from the choices that appear. After viewing the quote, you will have the option of sending the proposal via email to the client address entered on the Quote Specification page (note, if no email is entered in the field, you will be given the error, "Client does not have email address entered").

NOTE: The proposal appears in a "popup" window. You may need to approve popup windows from "msone.cloudapp.net" before viewing the proposal.

WARNING: Proposals are not automatically saved and only the quote specifications of the last run quote will be saved for any company. If you would like a record of the quotes run for a particular company, we recommend saving the pdf proposal with an easily identifiable name (i.e. "Silver plans for ABC Company").

NOTE: The EMAIL button will become active only after first viewing the proposal.

Viewing/Printing the Final Rates

The final step in the proposal process will be to present the prospective client with a proposal based on which plan each employee has chosen. After receiving the employee choices from the prospect, open the quote and click the Final Rates button.

The final rates report is made up of 4 sections:

- Cover Page – contains company name, preparation date and disclaimer information
- Census Page – contains census information for all employees, with effective date and specified quote option as well as a list of all census data that will be required to enroll in a plan.
- Premium Details – contains rate for each employee according to the plan they have chosen, broken down by employee cost, dependent cost and employer cost.
- Benefits – benefit sheet provided by the carrier, for each plan.

Each section can be selected to appear in the proposal by checking the appropriate checkbox in the Generate Final Rates Report area (by default, all sections except Benefits are selected).

NOTE: If the Effective Date of the proposal has passed, a new effective date will be calculated.

To select an employee's plan, click the Select link to choose the employee, and then select their plan from the Plan pull down menu (located above the cost breakdown). After selecting the plan, click the Save Changes button, and continue with the next employee, clicking the Save Changes button after selecting each employee's plan. When a plan is selected and saved to an employee, it will appear in the grid next to the Employee ID. When plans have been assigned to all employees, click the View button to see the final proposal.

	EE ID	Plan Name
Select	SB033	UnitedHealthcare Bronze HSA 5000
Select	DP058	UnitedHealthcare Bronze Navigate 5000
Select	KC007	
Select	AF220	

Final Rates Report [Go Back](#)

Cover Page Census Page Premium Details Benefits

EE ID: Plan:

EE Age: Employee Cost \$

Coverage Type: Dependent Cost \$

Annual Salary: Employer Cost \$

Zip Code: Total Cost \$

Out of State?

Example of the Final Rates screen

NOTE: Once the Final Rates have been assigned to an employee, you must clear the rates before running a new quote for the same company.

Clearing Final Rates

To clear final rates from an employee, click the Final Rates button, and then click the Clear Rates button. After you have successfully cleared the rates, plan names will be removed from the grid, and you can return to the Quote Specification area to run a new quote.

Additional Functions

Cancel Changes: If changes are made to the quote specifications, before saving the changes, you may click the Cancel Changes button to revert back to the last saved quote specification settings. You cannot “undo” cancelling changes.

Delete Company: The Delete Company button can be used to permanently delete a company from the database. **WARNING: If a company is deleted, all employee census information will also be deleted.**

Copy Company: The Copy Company button will create a new company record as an exact copy of the current record, with the exception of having a new Quote ID.

Download Census: A copy of the census can be downloaded by clicking the Download Census button. The census will be delivered to the Download folder in an Excel .xlsx format.

Copy Quote: If you would like to create a second instance of the same quote specifications and census, click the Copy Quote button. The new quote will be created and become the active quote.

Download Roster: The roster is all data fields required for enrollment in a plan. While this quoting system only fills a portion of those fields, the remaining fields can be manually entered and used during the enrollment process. A copy of the roster can be downloaded by clicking the Download Roster button (from the Final Rates screen or the Qualified Plans screen). The roster will be delivered to the Download folder in an Excel .xlsx format.