

PRO Quote

User Guide



WARNER 
Pacific

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About Plan Filtering

Plan Filtering lets you create custom quotes faster and more conveniently within PRO Quote. With Plan Filtering you can easily specify plans based on network, product type, key benefits and more.

Getting Started

➔ **Click on the Select Portfolios tab after starting a new quote or when editing an existing quote.**

1. Select the portfolios you want to include in your comparison.
2. Plan types and metallic levels will be selected in the next step.

Group Info	Census Data (3)	Census Worksheet (3)	Select Portfolios	Filter Plans	Generate Proposal
Medical	Dental	Vision	Life		
<p>Grandmothered / Grandfathered plans are an extension of current coverage and are used for comparison purposes only. They are not available for new purchase.</p>					
<p>Customize Your Quote!</p>					
Narrow Benefit Selections		Set Sort Order and other options		Brand Your Quote	
<p>TIP: Use the Filter Plans tab to choose Metallic Level, Plan Types, Networks and more.</p>					
<input type="button" value="Check All"/> <input type="button" value="Uncheck All"/>					
Not Selected	Aetna CA + Infertility		PPO	HMO	
Selected	Aetna CA		PPO	HMO	
Not Selected	Anthem Blue Cross (CA) Prudent Buyer PPO w/ Select HMO/Priority Select HMO		PPO	HMO	

Filter Your Plans

➔ Click on the Filter Plan tab to make your selections.

1. Click on the boxes to select the plan filters you want to use.
2. The Plans Selected counter at the bottom will update to reflect the plan filters you choose.

The screenshot shows the 'Filter Plans' interface. At the top, there are navigation tabs: Group Info, Census Data (3), Census Worksheet (3), Select Portfolios, **Filter Plans**, and Generate Proposal. Below these are sub-tabs for Medical, Dental, and Vision. The main content area contains a tip: 'TIP: Scroll down to view and finalize your plan selections.' Below the tip are various filter categories with selection options:

- Carrier:** Aetna (CA)
- Plan Type:** PPO, HMO
- Metallic Level:** Bronze, Silver, Gold, Platinum
- Network:** HMO Full, HMO Limited, PPO Full, PPO Limited
- HSA Eligible:** Yes, No
- Deductible:** \$0-\$499, \$500-\$999, \$1000-\$1499, \$1500-\$1999, \$2000-\$2999, \$3000-\$3999, \$4000-\$4999, \$6000+
- Office Visits:** 0%-19%, 40+%, \$0-\$19, \$20-\$29, \$30-\$39, \$40-\$49, \$50-\$59, \$60+
- Inpatient Hospital Services:** 0%-19%, 20%-29%, 30%-39%, 40+%, \$1-\$249, \$250-\$500, \$501-\$999
- Out-of-Pocket Max:** \$3000-\$3999, \$4000-\$4999, \$5000-\$5999, \$6000+
- Prescription Drugs Deductible:** None, \$1-\$249, \$250-\$499, \$500+, Combined with Medical
- Infertility:** No

At the bottom right, there is a counter: 'Set 1: Plans Selected 0002'. Below the filter area, there are buttons for 'Clear Filters', 'View Rates', 'Show All Plans', and 'Filter Count Details'. At the very bottom, there are 'Manual Override Controls' including 'Uncheck All', 'Uncheck Disqualified Plans', 'Hide Overrides', and 'Remove All Overrides'. The effective date is shown as 'Plans for Effective Date: 10/01/2023'.

Select Your Plans

→ Check the boxes to select or deselect plans.

1. Choose to select or deselect individual plans or all plans.
2. Check the Show All Plans box to see the plans you've excluded and bring them back into your proposal, if desired.
3. When you deselect a plan, the color of that row will change to indicate it has been deselected.

Clear Filters View Rates Show All Plans Filter Count Details Set 1: Plans Selected **0002**

Plans for Effective Date: 01/01/2024


Manual Override Controls:

<input type="checkbox"/>	Carrier	Metallic Level	Type	Plan	Ped Dent	Deductible	Office Visits	Inpatient Hospital Services	Out-of-Pocket Max	Prescription Drugs
<input checked="" type="checkbox"/>	Aetna (CA)	Bronze	PPO	CA Bronze MC 100 7050 HSA M	Emb	\$7,050/ \$14,100 embedded	0%	0%	\$7,050/ \$14,100 embedded; includes ded	MedDed (1-4); 0%
<input type="checkbox"/>	Aetna (CA)	Bronze	PPO	CA Bronze MC 50/50 8300	Emb	\$8,300/ \$16,600 embedded	\$85 (ded waived 1st visit) then 0%/\$95	50%	\$8,900/ \$17,500 embedded; includes ded	MedDed (2-4); \$30/\$100/\$150/50%
<input type="checkbox"/>	Aetna (CA)	Bronze	PPO	CA Bronze MC 55/50 5500	Emb	\$5,500/ \$11,000 embedded	\$70/\$80 (ded waived)	45%	\$9,100/ \$18,200 embedded; includes ded	MedDed (2-4); \$20/\$80/\$100/45%
<input checked="" type="checkbox"/>	Aetna (CA)	Bronze	PPO	CA Bronze MC Savings Plus 100 7050 HSA M	Emb	\$7,050/ \$14,100 embedded	0%	0%	\$7,050/ \$14,100 embedded; includes ded	MedDed (1-4); 0%
<input type="checkbox"/>	Aetna (CA)	Bronze	PPO	CA Bronze MC Savings Plus 50/50 8300	Emb	\$8,300/ \$16,600 embedded	\$85 (ded waived 1st visit) then 0%/\$95	50%	\$8,900/ \$17,500 embedded; includes ded	MedDed (2-4); \$30/\$100/\$150/50%
<input type="checkbox"/>	Aetna (CA)	Bronze	PPO	CA Bronze MC Savings Plus 55/50 5500	Emb	\$5,500/ \$11,000 embedded	\$70/\$80 (ded waived)	45%	\$9,100/ \$18,200 embedded; includes ded	MedDed (2-4); \$20/\$80/\$100/45%
<input type="checkbox"/>	Aetna (CA)	Bronze	PPO	CA Bronze PPO 50/50 8300	Emb	\$8,300/ \$16,600 embedded	\$85 (ded waived 1st visit) then 0%/\$95	50%	\$8,900/ \$17,500 embedded; includes ded	MedDed (2-4); \$30/\$100/\$150/50%
<input type="checkbox"/>	Aetna (CA)	Bronze	PPO	CA Bronze PPO 55/50 5500	Emb	\$5,500/ \$11,000 embedded	\$70/\$80 (ded waived)	45%	\$9,100/ \$18,200 embedded; includes ded	MedDed (2-4); \$20/\$80/\$100/45%
<input type="checkbox"/>	Aetna (CA)	Silver	PPO	CA Silver MC 60/50 2100	Emb	\$2,100/ \$4,200 embedded	\$45/\$75 (ded waived)	40%	\$9,100/ \$18,200 embedded; includes ded	\$300/\$600 (2-4); \$20/\$80/\$120/40%
<input type="checkbox"/>	Aetna (CA)	Silver	PPO	CA Silver MC 65/50 2500 M	Emb	\$2,500/ \$5,000 embedded	\$55/\$90 (ded waived)	35%	\$8,600/ \$17,200 embedded; includes ded	\$300/\$600 (2-4); \$20/\$75/\$105/30%
<input type="checkbox"/>	Aetna (CA)	Silver	PPO	CA Silver MC 65/50 2600	Emb	\$2,600/ \$5,200 embedded	\$50/\$90 (ded waived)	35%	\$9,000/ \$18,000 embedded; includes ded	\$100/\$200 (2-4); \$15/\$70/\$120/30%
<input type="checkbox"/>	Aetna (CA)	Silver	PPO	CA Silver MC Savings Plus 60/50 2100	Emb	\$2,100/ \$4,200 embedded	\$45/\$75 (ded waived)	40%	\$9,100/ \$18,200 embedded; includes ded	\$300/\$600 (2-4); \$20/\$80/\$120/40%
<input type="checkbox"/>	Aetna (CA)	Silver	PPO	CA Silver MC Savings Plus 65/50 2500 M	Emb	\$2,500/ \$5,000 embedded	\$55/\$90 (ded waived)	35%	\$8,600/ \$17,200 embedded; includes ded	\$300/\$600 (2-4); \$20/\$75/\$105/30%
<input type="checkbox"/>	Aetna (CA)	Silver	PPO	CA Silver MC Savings Plus 65/50 2600	Emb	\$2,600/ \$5,200 embedded	\$50/\$90 (ded waived)	35%	\$9,000/ \$18,000 embedded; includes ded	\$100/\$200 (2-4); \$15/\$70/\$120/30%

View Rates and Employees

➔ Click the **View Rates** button to show the **Rate** and **EE** in **Area** columns.


1. The Rate column shows a total rate for each plan for your group.
2. The EE in Area column shows how many employees are in an area, compared to the total.
3. Click on the Rate to view a rate and benefit breakdown for each employee.



Plans for Effective Date: 10/01/2023										
Manual Override Controls: Uncheck All Uncheck Disqualified Plans Hide Overrides Remove All Overrides										
<input type="checkbox"/>	Carrier	Metallic Level	Type	Plan	Ped Dent	Deductible	Office Visits	Inpatient Hospital Services	Out-of-Pocket Max	Prescription Drugs
<input checked="" type="checkbox"/>	Aetna (CA)	Bronze	PPO	CA Bronze MC 100 7000 HSA M	Emb	\$7,000/ \$14,000 embedded	0%	0%	\$7,000/ \$14,000 embedded; includes ded	MedDed (1-4); 0%
<input type="checkbox"/>	Aetna (CA)	Bronze	PPO	CA Bronze MC 100/50 7350	Emb	\$7,350/ \$14,700 embedded	\$70/\$125 (ded waived)	\$500/admission	\$8,700/ \$14,400 embedded; includes ded	MedDed (2-4); \$15/\$85/\$125/40%



When you click on the **View Rates** button, it expands the table to show **Rate** and **EE** in **Area** columns, and the button disappears.



Plans for Effective Date: 10/01/2023												
Manual Override Controls: Uncheck All Uncheck Disqualified Plans Hide Overrides Remove All Overrides												
<input type="checkbox"/>	Carrier	Metallic Level	Type	Plan	Ped Dent	Deductible	Office Visits	Inpatient Hospital Services	Out-of-Pocket Max	Prescription Drugs	Rate	EE in Area
<input checked="" type="checkbox"/>	Aetna (CA)	Bronze	PPO	CA Bronze MC 100 7000 HSA M	Emb	\$7,000/ \$14,000 embedded	0%	0%	\$7,000/ \$14,000 embedded; includes ded	MedDed (1-4); 0%	\$1,987.16	3/3

CA Bronze MC 100 7000 HSA M							
Employee Name	Age	Tier	Dep Count	Area	EE	Dep	Total
Employee 001	43	EE	0	CA12	682.33	0.00	682.33
Employee 002	43	EE	0	CA12	682.33	0.00	682.33
Sam Smith	37	EE	0	CA12	622.50	0.00	622.50
Total: 3				Rate Totals:		\$1,987.16	\$0.00

About Standard Proposals

Warner Pacific’s Standard Proposal allows you to compare any number of plans in our portfolio. You can quote medical, dental, vision and/or life in a single proposal.

Key features include:

1. Easy navigation from step to step
2. Quote a single plan, or the entire portfolio
3. Customize your quote to show just what you need
4. Excel and PDF quoting reports

There are several report options available with every Standard Proposal so you can choose the layout that is right for your client.

Presented By: Mobile App Demo License#: 5741357

CA App Test

Westlake Village, Los Angeles County, CA 91361 **SIC Code: 1 - No SIC provided**

MEDICAL - Effective Date: 1/1/2024 - Monthly (12 pay periods)

Carrier Network Plan	Plan Type	Deductible	Office Visits (PCP/Specialist) *	Inpatient Hospital Services *	Out-of-Pocket Max	RX Tiers 1/2/3/4	Ped Dent	EE in area	EE Rate	Dep Rate	Total Rate
Aetna Savings Plus PPO CA Bronze MC Savings Plus 100 7050 HSA M	PPO	\$7,050/ \$14,100 embedded	0%	0%	\$7,050/ \$14,100 embedded; includes ded	MedDed (1-4); 0%	Emb	10/10	6,513.01	0.00	<u>\$6,513.01</u>
Aetna PPO Full CA Bronze MC 100 7050 HSA M	PPO	\$7,050/ \$14,100 embedded	0%	0%	\$7,050/ \$14,100 embedded; includes ded	MedDed (1-4); 0%	Emb	10/10	7,180.49	0.00	<u>\$7,180.49</u>

* Unless stated, all services are subject to deductible.
 Final rates are determined by the Carrier. This quote is not valid without the separate general disclaimer.
 # Dependent children 21-25 years old are rated as adults. Dependent children may become ineligible for coverage on their 26th birthday; effective date of change may vary by carrier.

Create Date: 12/6/2023 Quote Id: 4925-1380
 Sorted by: Carrier,PlanType,Premium(Ascending)

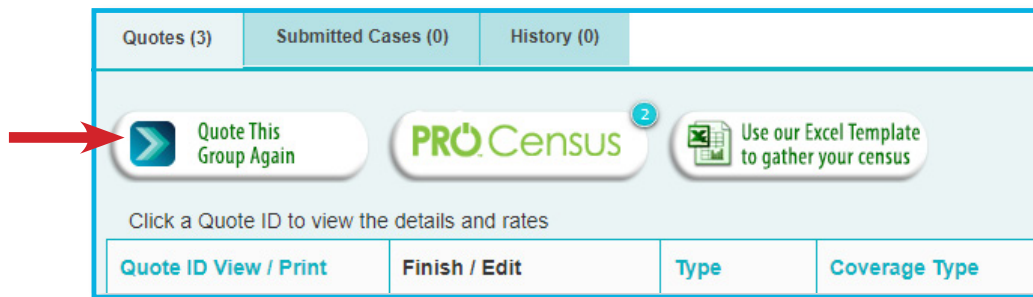
Getting Started

The Standard Proposal is your best option when you need a summary with a detailed benefit comparison for all the plans available to your client.



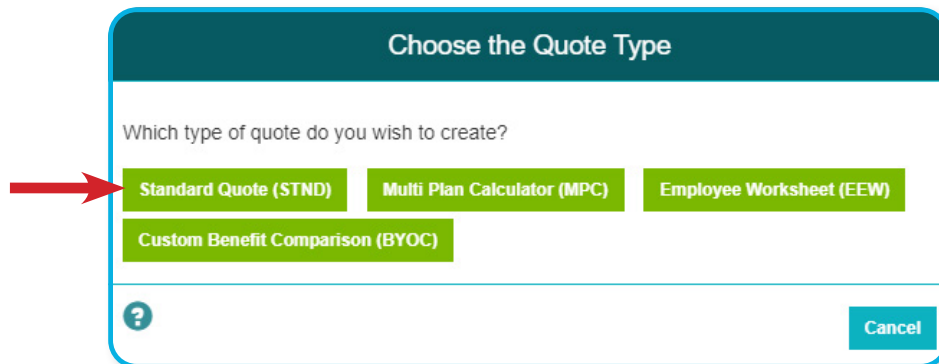
You can also quote Optional Benefits, including Identity Protection and Minimum Essential Coverage.

- You will either "Enter New Group Account" or choose the group if it already exists. If you choose a group that already exists, then you choose to "Quote This Group Again" if the group is in PRO Quote.



- Click on Standard Quote when prompted.

1. Select your line of coverage, effective date and fill in your census information, as you would any other quote type.



➔ If the group is not in PRO Quote, you will want to choose **Enter a New Group Account**.

The screenshot shows the PRO Quote dashboard with the following elements:

- Navigation: < Return to Dashboard, W logo, Test Broker
- Message: NEW! You now have a Filter Plans tab to select just the plans you want based on benefits. Only want Full Networks? No problem. Only want HSA eligible plans? No problem. Need a certain deductible range? No problem. You get the ideal And... to give you the best possible experience, you can continue to select specific plans just like before!
- Tabs: My Accounts (68 of 2761), My Team, My Delegates (15), Delegation Administration, Pro Apply Enrollments (24A/45C)
- Dropdown: Select the broker account: Broker, Test M. (Testing/World)
- Buttons: Enter New Group Account, Quote A New Individual, Lookup Carrier Availability
- Search: Find Your Account: [input] Search
- Info: Displaying 68 of 2761 accounts with activity in the past six months. To view all accounts Click Here
- Table: Click on a name to view details & quote again.

Name	Account Size	City	Zip	Quotes	Last Date Quoted	Cases	Last Date Submitted
Insurance Labs	Small Group	Chatsworth	91311	0		0	
Warner Bakery	Small Group	Beverly Hills	90210	0		0	

➔ When using PRO Quote, one of the first decisions made is deciding which group you want to associate your quote with. You could either create a new group by clicking “Enter New Group Account” or click on the name of one of your existing groups to create a quote for that group.

The 'Enter New Group Account' form contains the following fields and elements:

- Group Name* [input]
- DBA [input]
- Industry Code [input] [dropdown icon]
- Group Zip Code* [input]
- * indicates required fields
- Buttons: Cancel, Save
- Copyright © 2000-2024 Warner Pacific Insurance Services

➔ **Creating a new group**

1. After clicking “Enter New Group Account,” you will be prompted to enter the asterisked fields then click save to create your group.
2. Pro Tip: SIC codes are not required in order to create a group or quote fully insured medical coverage, but are required when quoting ancillary coverage.

Choose Your Carriers

→ Use the Select Portfolios tab to choose the carriers to include in your proposal.

Group Info | Census Data (2) | Census Worksheet (2) | **Select Portfolios** | Filter Plans | Generate Proposal

Medical | Dental | Vision | Life

Grandmothered / Grandfathered plans are an extension of current coverage and are used for comparison purposes only. They are not available for new purchase.

Customize Your Quote!

Narrow Benefit Selections | Set Sort Order and other options | Brand Your Quote

TIP: Use the Filter Plans tab to choose Metallic Level, Plan Types, Networks and more.

Check All | Uncheck All

Not Selected	Aetna CA + Infertility	PPO	HMO
Selected	Aetna CA	PPO	HMO
Not Selected	Anthem Blue Cross (CA) Prudent Buyer PPO w/ Select HMO/Priority Select HMO	PPO	HMO
Not Selected	Anthem Blue Cross (CA) Prudent Buyer PPO w/ Traditional HMO/Select HMO	PPO	HMO
Not Selected	Anthem Blue Cross (CA) Select PPO w/ Select HMO/Priority Select HMO	PPO	HMO
Not Selected	Anthem Blue Cross (CA) Select PPO w/ Traditional HMO/Select HMO	PPO	HMO



When you are editing a quote from the Group Info tab, click on Change Quote Type to switch to a Standard Quote.

→ Click on the carrier links to view the plans included in that portfolio.

TIP: Use the Filter Plans tab to choose Metallic Level, Plan Types, Networks and more.

Check All | Uncheck All

Not Selected	Aetna CA + Infertility	PPO	HMO
Selected	Aetna CA	PPO	HMO
Not Selected	Anthem Blue Cross (CA) Prudent Buyer PPO w/ Select HMO/Priority Select HMO	PPO	HMO
Not Selected	Anthem Blue Cross (CA) Prudent Buyer PPO w/ Traditional HMO/Select HMO	PPO	HMO
Not Selected	Anthem Blue Cross (CA) Select PPO w/ Select HMO/Priority Select HMO	PPO	HMO
Not Selected	Anthem Blue Cross (CA) Select PPO w/ Traditional HMO/Select HMO	PPO	HMO

Click a link to view plans in the portfolio

Select The Benefits For Your Proposal (optional)

➔ Click on Narrow Benefit Selections

Grandmothered / Grandfathered plans are an extension of current coverage and are used for comparison purposes only. They are not available for new purchase.

Customize Your Quote!

Narrow Benefit Selections **Set Sort Order and other options** **Brand Your Quote**

TIP: Use the Filter Plans tab to choose Metallic Level, Plan Types, Networks and more.

Check All	Uncheck All			
Not Selected	Aetna CA + Infertility		PPO	HMO
Selected	Aetna CA		PPO	HMO
Not Selected	Anthem Blue Cross (CA) Prudent Buyer PPO w/ Select HMO/Priority Select HMO		PPO	HMO
Not Selected	Anthem Blue Cross (CA) Prudent Buyer PPO w/ Traditional HMO/Select HMO		PPO	HMO
Not Selected	Anthem Blue Cross (CA) Select PPO w/ Select HMO/Priority Select HMO		PPO	HMO
Not Selected	Anthem Blue Cross (CA) Select PPO w/ Traditional HMO/Select HMO		PPO	HMO

➔ Check to select the benefits for your proposal.

Narrow Benefit Selections

Out of Network Benefits: Include Exclude

Benefit Descriptions: Summary Detail

Uncheck All **Check All** Double click a benefit name to highlight it on reports. **Close**

Deductible

- Individual
- Family

Out-of-Pocket Max

- Individual
- Family

Physician Services

- Office Visits
- Telemedicine
- Preventive Care
- Diagnostic Lab/X-Ray
- Imaging (CT/PET scans, MRIs)
- Rehabilitation/Habilitation (PT/OT/ST)
- Chiropractic Care

Close

Pick Your Sort Order (optional)

➔ Click on Set Sort Order and Other Options.

Grandmothered / Grandfathered plans are an extension of current coverage and are used for comparison purposes only. They are not available for new purchase.

Customize Your Quote!

Narrow Benefit Selections | **Set Sort Order and other options** | Brand Your Quote

TIP: Use the Filter Plans tab to choose Metallic Level, Plan Types, Networks and more.

Check All	Uncheck All			
Not Selected	Aetna CA + Infertility	PPO	HMO	
Selected	Aetna CA	PPO	HMO	
Not Selected	Anthem Blue Cross (CA) Prudent Buyer PPO w/ Select HMO/Priority Select HMO	PPO	HMO	



You can select from 14 different sort options for your plans.

Set Sort Order and other options

Please Note: These settings will apply to all coverage types on this quote.

Please tell us how you would like your proposal sorted:

Sort By: Premium Only, Carrier / Metallic Level, Carrier / Metallic Level / Plan Type*, Carrier / Plan Type*, * Examples of Plan Types: PPO, HMO, HSA

Carrier Sort: Alphabetical Order, Exchange Plans First, Exchange Plans Last

Premium Sort: Premium Ascending, Premium Descending

Will you be requesting a bound copy of this proposal: Yes No

Would you like an Enrollment Worksheet for COBRA participants (employer contributions are not applied to premium for COBRA participants): Yes No

Calculate Rates per Employee Report premiums using the following number of pay periods: 12 (Monthly)

Close

➔ **Select from other options, including:**

1. Request a bound copy of your proposal
2. Include COBRA participants in the Employee Worksheet
3. Set the number of pay periods for the Rates per Employee report

Set Sort Order and other options

Please Note: These settings will apply to all coverage types on this quote.

Please tell us how you would like your proposal sorted:

<p>Sort By:</p> <div style="border: 1px solid #ccc; padding: 2px;"> Premium Only Carrier / Metallic Level Carrier / Metallic Level / Plan Type* Carrier / Plan Type* </div> <p style="font-size: x-small; margin-top: 5px;">* Examples of Plan Types: PPO, HMO, HSA</p>	<p>Carrier Sort:</p> <p><input checked="" type="radio"/> Alphabetical Order</p> <p><input type="radio"/> Exchange Plans First</p> <p><input type="radio"/> Exchange Plans Last</p>	<p>Premium Sort:</p> <p><input checked="" type="radio"/> Premium Ascending</p> <p><input type="radio"/> Premium Descending</p>
--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------	------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------	--------------------------------------------------------------------------------------------------------------------------------

Will you be requesting a bound copy of this proposal:

Yes No

Would you like an Enrollment Worksheet for COBRA participants (employer contributions are not applied to premium for COBRA participants):

Yes No

Calculate Rates per Employee Report premiums using the following number of pay periods:

12 (Monthly) ▼

Close



Pay periods other than 12 will not be reflected on following reports: Rate Tables, Grand Summary and Carrier Premium Summary reports.

Customize Your Plan Selections

➔ **Use the Filter Plans tab to define your plan selections.**

1. The options shown are based on the carrier portfolios you selected earlier.
2. Click to select the benefit options you want to include in your quote.

Group Info
Census Data (2)
Census Worksheet (2)
Select Portfolios
★
Filter Plans
Generate Proposal

Medical
Dental
Vision

Now you can apply filters and save them as individual sets!

Viewing

Set 1 ...

Start New Set (5 max)

Remove All Filter Sets 🗑️

TIP: Scroll down to view and finalize your plan selections.

Carrier ? Aetna (CA)

Select all / Clear all

★ **Plan Type** ? PPO HMO

Select all / Clear all

Metallic Level ? Bronze Silver Gold Platinum

Select all / Clear all

Network ? HMO Full HMO Limited PPO Full PPO Limited

Select all / Clear all

HSA Eligible ? Yes No

Select all / Clear all

Deductible ? \$0-\$499 \$500-\$999 \$1000-\$1499 \$1500-\$1999 \$2000-\$2999

Select all / Clear all

Office Visits ? 0%-19% 40+% \$0-\$19 \$20-\$29 \$30-\$39 \$40-\$49 \$50-\$59

Select all / Clear all

Inpatient Hospital Services ? 0%-19% 20%-29% 30%-39% 40+% \$1-\$249 \$250-\$500

Select all / Clear all

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The plan design options that appear are tailored to the portfolios you selected. If you change selections on the Select Portfolios tab, the Filter Plans tab will update to match your new selections.

➔ Click the **View Rates** button to see the total group cost for that plan.

Infertility ⓘ
Select all / Clear all

Click an option (above) to limit your plans to just what you want to show. [more](#)

Clear Filters
View Rates
 Show All Plans
 Filter Count Details

Plans for Effective Date: 11/01/2023

Manual Override Controls:
 Uncheck All
Uncheck Disqualified Plans
Hide Overrides
Remove All Overrides

	Carrier	Metallic Level	Type	Plan	Ped Dent	Deductible	Office Visits
--	---------	----------------	------	------	----------	------------	---------------

➔ **Uncheck Show All Plans** to view only the plans that match your selections.

Now you can apply filters and save them as individual sets!

Viewing

Set 1

Start New Set (5 max)

Remove All Filter Sets

TIP: Scroll down to view and finalize your plan selections.

Carrier ⓘ
Select all / Clear all

★
Plan Type ⓘ
Select all / Clear all

★
Metallic Level ⓘ
Select all / Clear all

★
Network ⓘ
Select all / Clear all

HSA Eligible ⓘ
Select all / Clear all

Deductible ⓘ
Select all / Clear all

Office Visits ⓘ
Select all / Clear all

Inpatient Hospital Services ⓘ
Select all / Clear all

Out-of-Pocket Max ⓘ
Select all / Clear all

Prescription Drugs Deductible ⓘ
Select all / Clear all

Infertility ⓘ
Select all / Clear all

Click an option (above) to limit your plans to just what you want to show. [more](#)

Clear Filters
View Rates
 Show All Plans
 Filter Count Details

Plans for Effective Date: 11/01/2023

➔ Scroll to view your plans, and select the plans you want to include in your proposal.

Clear Filters View Rates Show All Plans Filter Count Details Set 1: Plans Selected **0015**

Plans for Effective Date: 11/01/2023

Manual Override Controls: [Uncheck All](#) [Uncheck Disqualified Plans](#) [Hide Overrides](#) [Remove All Overrides](#)

<input type="checkbox"/>	Carrier	Metallic Level	Type	Plan	Ped Dent	Deductible	Office Visits	Inpatient Hospital Services	Out-of-Pocket Max	Prescription Drugs
<input checked="" type="checkbox"/>	Aetna (CA)	Gold	PPO	CA Gold MC 70/50 1250	Emb	\$1,250/ \$2,500 embedded	\$30/\$50 (ded waived)	30%	\$7,500/ \$15,000 embedded; includes ded	\$300/\$600 Ded (2-4); \$15/\$55/\$80/30%
<input checked="" type="checkbox"/>	Aetna (CA)	Gold	PPO	CA Gold MC 75/50 500	Emb	\$500/ \$1,000 embedded	\$20/\$50 (ded waived)	25%	\$8,200/ \$16,400 embedded; includes ded	\$300/\$600 Ded (2-4); \$15/\$55/\$80/25%
<input checked="" type="checkbox"/>	Aetna (CA)	Gold	PPO	CA Gold MC 80/50 1500	Emb	\$1,500/ \$3,000 embedded	\$40/\$45 (ded waived)	20%	\$5,000/ \$10,000 embedded; includes ded	\$300/\$600 Ded (2-4); \$15/\$55/\$80/20%
<input checked="" type="checkbox"/>	Aetna (CA)	Gold	PPO	CA Gold MC 80/50 350 M	Emb	\$350/ \$700 embedded	\$25/\$50 (ded waived)	20%	\$7,800/ \$15,600 embedded; includes ded	\$15/\$50/\$80/20%



Click on a plan title to view, save or print a full list of benefits.

Clear Filters View Rates Show All Plans Filter Count Details Plans for Effec

Manual Override Controls: [Uncheck All](#) [Uncheck Disqualified Plans](#) [Hide Overrides](#) [Remove All Overrides](#)

<input type="checkbox"/>	Carrier	Metallic Level	Type	Plan	Ped Dent	Deductible
<input checked="" type="checkbox"/>	Aetna (CA)	Gold	PPO	CA Gold MC 70/50 1250	Emb	\$1,250/ \$2,500 embedded
<input checked="" type="checkbox"/>	Aetna (CA)	Gold	PPO	CA Gold MC 75/50 500	Emb	\$500/ \$1,000 embedded
<input checked="" type="checkbox"/>	Aetna (CA)	Gold	PPO	CA Gold MC 80/50 1500	Emb	\$1,500/ \$3,000 embedded
<input checked="" type="checkbox"/>	Aetna (CA)	Gold	PPO	CA Gold MC 80/50 350 M	Emb	\$350/ \$700 embedded

➔ Use the column headers to sort your plans for easier selection.

Clear Filters View Rates Show All Plans Filter Count Details Set 1: Plans Selected **0015**

Plans for Effective Date: 11/01/2023

Manual Override Controls: [Uncheck All](#) [Uncheck Disqualified Plans](#) [Hide Overrides](#) [Remove All Overrides](#)

<input type="checkbox"/>	Carrier	Metallic Level	Type	Plan	Ped Dent	Deductible	Office Visits	Inpatient Hospital Services	Out-of-Pocket Max	Prescription Drugs
<input checked="" type="checkbox"/>	Aetna (CA)	Gold	PPO	CA Gold MC 70/50 1250	Emb	\$1,250/ \$2,500 embedded	\$30/\$50 (ded waived)	30%	\$7,500/ \$15,000 embedded; includes ded	\$300/\$600 Ded (2-4); \$15/\$55/\$80/30%



Click on the Rate link to see a breakdown of rates for each employee.

Clear Filters Show All Plans Filter Count Details Set 1: Plans Selected **0002**

Plans for Effective Date: 10/01/2023

Manual Override Controls: [Uncheck All](#) [Uncheck Disqualified Plans](#) [Hide Overrides](#) [Remove All Overrides](#)

<input type="checkbox"/>	Carrier	Metallic Level	Type	Plan	Ped Dent	Deductible	Office Visits	Inpatient Hospital Services	Out-of-Pocket Max	Prescription Drugs	Rate	EE in Area
<input checked="" type="checkbox"/>	Aetna (CA)	Bronze	PPO	CA Bronze MC 100 7000 HSA M	Emb	\$7,000/ \$14,000 embedded	0%	0%	\$7,000/ \$14,000 embedded; includes ded	MedDed (1-4); 0%	\$1,987.16	3/3

Finish Your Quote

➔ Click on Generate Proposal to finish your quote.

➔ Click to select your proposal illustrations and view proposal details.

➔ Select your proposal reports to view, print or email.

About Multi-Plan Calculator

The Multi-Plan Calculator is the best quoting tool choice when you want to compare your group’s renewal options. This is particularly useful when employees are on multiple plan options, because it lets you present the best alternative option, by participant, in an easy-to-read document.

Key features include:

1. Side-by-side comparisons
2. Compare current plan to renewal plan, and other carrier options, including employer contribution
3. Excel and PDF formats

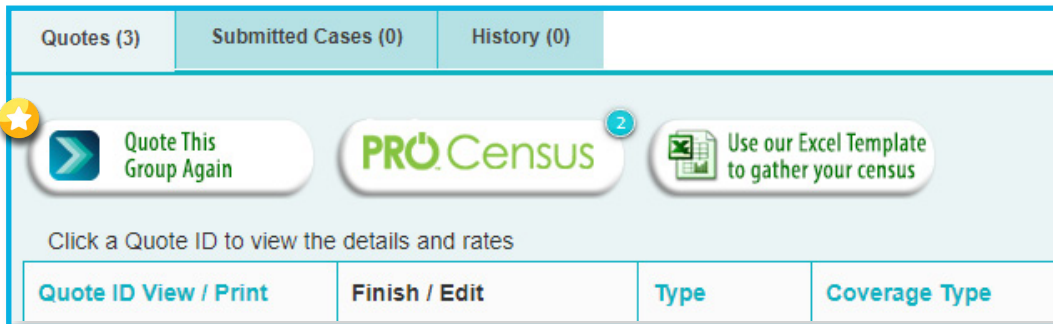
Mobile App Demo		Test Group										DBA:																																					
Lic# 5741357		Multi-Plan Calculator Summary										Ventura, Ventura County, CA 93003																																					
Create Date: 11/1/2023		Columnar View										SIC Code: 1 - No SIC provided																																					
Quote Id: 4841-9677																																																	
<p>These rates are based on the ages of employees and their dependents as of the requested effective date. The Contribution amounts listed on this report may not reflect actual final contribution totals. Pediatric Dental is included in the Medical rate for all Off-Exchange plans in this quote.</p>																																																	
<p>Medical</p> <p>Alternative Option: 12/1/2023 (A) Aetna CA + Infertility</p> <p>Monthly Rate (12 pay periods)</p> <table border="1"> <thead> <tr> <th>Plan</th> <th>EE's</th> <th>ER Cost</th> <th>EE Cost</th> <th>Dep Cost</th> <th>Total Premium</th> </tr> </thead> <tbody> <tr> <td>(A) CA Bronze MC 50/50 8300 w/INF</td> <td>2/2</td> <td>0.00</td> <td>1,101.84</td> <td>0.00</td> <td>1,101.84</td> </tr> <tr> <td>Total:</td> <td>2/2</td> <td>\$0.00</td> <td>\$1,101.84</td> <td>\$0.00</td> <td>\$1,101.84</td> </tr> </tbody> </table>						Plan	EE's	ER Cost	EE Cost	Dep Cost	Total Premium	(A) CA Bronze MC 50/50 8300 w/INF	2/2	0.00	1,101.84	0.00	1,101.84	Total:	2/2	\$0.00	\$1,101.84	\$0.00	\$1,101.84	<p>Alternative Option: 12/1/2023 (BS) Blue Shield PPO w/ Access & Trio ACO HMOs</p> <p>Monthly Rate (12 pay periods)</p> <table border="1"> <thead> <tr> <th>Plan</th> <th>EE's</th> <th>ER Cost</th> <th>EE Cost</th> <th>Dep Cost</th> <th>Total Premium</th> </tr> </thead> <tbody> <tr> <td>(BS) Bronze Tandem PPO 5500/65 OffEx</td> <td>2/2</td> <td>0.00</td> <td>924.57</td> <td>0.00</td> <td>924.57</td> </tr> <tr> <td>Total:</td> <td>2/2</td> <td>\$0.00</td> <td>\$924.57</td> <td>\$0.00</td> <td>\$924.57</td> </tr> </tbody> </table>						Plan	EE's	ER Cost	EE Cost	Dep Cost	Total Premium	(BS) Bronze Tandem PPO 5500/65 OffEx	2/2	0.00	924.57	0.00	924.57	Total:	2/2	\$0.00	\$924.57	\$0.00	\$924.57		
Plan	EE's	ER Cost	EE Cost	Dep Cost	Total Premium																																												
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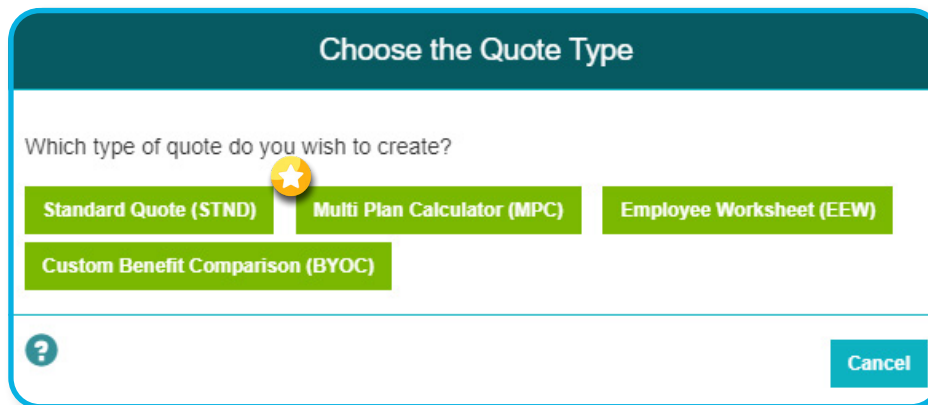
Getting Started

You will either "Enter New Group Account" or choose the group if it already exists. If you choose a group that already exists, then you choose to "Quote This Group Again" if the group is in PRO Quote. If the group hasn't been quoted, then you choose *Run a Quote*.

→ Click on **Quote This Group Again**.



→ Click on **Multi-Plan Calculator (MPC)** when prompted.



When you are editing a quote, from the Group Info tab, click on Change Quote Type to switch to a Multi-Plan Calculator.

Choose Your Carriers

➔ Click the **Select Portfolios** Tab to select the carriers for your proposal.

Use the top section to select your group's current portfolio when applicable.

The screenshot shows the 'Select Portfolios' tab with the following details:

- Group Info | Census Data (2) | Census Worksheet (2) | **Select Portfolios** | Filter Plans | Select Plans | Contributions | Generate Proposal
- Medical | Dental | Vision | Life
- Compare Current Rates to Renewal
- Effective Date: 10/01/2023
- Portfolio: Anthem Blue Cross (CA) Prudent Buyer PPO w/ Select HMO/Priority Select HMO
- Wrap: No Wrap



You may illustrate groups written alongside another carrier.

➔ Select your renewal portfolio and other carrier options for comparison.

The screenshot shows the 'Renewal/Proposed Rates' section with the following details:

- Effective Date: 12/01/2023
- Alternate Effective Date: [Empty]
- Medical Plan Comparison Tool
- Wrap Option: [Dropdown menu]
- View Kaiser Wrap Guidelines
- Narrow Benefit Selections | Brand Your Quote
- Grandmothered/Grandfathered plans are an extension of current coverage and are used for comparison purposes only. They are not available for new purchase.
- TIP: Use the Filter Plans tab to choose Metallic Level, Plan Types, Networks and more.
- Carrier List:
 - Aetna CA + Infertility (Effective Date:)
 - Aetna CA (Effective Date:)
 - Anthem Blue Cross (CA) Prudent Buyer PPO w/ Select HMO/Priority Select HMO (Effective Date:)
 - Anthem Blue Cross (CA) Prudent Buyer PPO w/ Traditional HMO/Select HMO (Effective Date:)
 - Anthem Blue Cross (CA) Select PPO w/ Select HMO/Priority Select HMO (Effective Date:)



Click on the carrier portfolio name to view the plans included in that portfolio.

Select Benefits For Your Proposal (optional)

➔ Click on Narrow Benefit Selections.

➔ Check the benefits that will best suit your proposal objectives.

Customize Your Plan Selections (optional)

→ Use the Filter Plans tab to define your plan selections.

1. The options that appear are based on the carrier portfolios you selected.
2. Click the plan options to select the benefits you want to feature.

Group Info | Census Data (2) | Census Worksheet (2) | Select Portfolios | **Filter Plans** | Select Plans | Contributions | Generate Proposal

Medical | Dental | Vision

Now you can apply filters and save them as individual sets!

Viewing

Set 1

Start New Set (5 max)

Remove All Filter Sets

TIP: Scroll down to view and finalize your plan selections.

Carrier Aetna (CA) | Blue Shield of CA | Community Care

Plan Type PPO | HMO | EPO

Metallic Level Bronze | Silver | Gold | Platinum

Network HMO Full | HMO Limited | PPO Full | PPO Limited

HSA Eligible Yes | No

Deductible \$0-\$499 | \$500-\$999 | \$1000-\$1499 | \$1500-\$1999 | \$2000-\$2999 | \$3000

Office Visits 0% - 10% | 0% - 20% | 0% - 30% | 10 - 20 | 0% - 10 | 0% - 20 | 0% - 30



The plan design options that appear are tailored to the portfolios you selected. If you change selections on the Select Portfolios tab, the Filter Plans tab will update to match your new selections.

➔ **Uncheck Show All Plans to review the plans that match your selections.**

Now you can apply filters and save them as individual sets!

TIP: Scroll down to view and finalize your plan selections.

Carrier Select all / Clear all

Plan Type Select all / Clear all

Metallic Level Select all / Clear all

Network Select all / Clear all

HSA Eligible Select all / Clear all

Deductible Select all / Clear all

Office Visits Select all / Clear all

Inpatient Hospital Services Select all / Clear all

Out-of-Pocket Max Select all / Clear all

Prescription Drugs Deductible Select all / Clear all

Infertility Select all / Clear all

Click an option (above) to limit your plans to just what you want to show. [more](#)

Show All Plans Filter Count Details

➔ **Scroll to review your plans and select the specific plans you want to include in your proposal.**

Show All Plans Filter Count Details

Plans for Effective Date: 12/01/2023

Manual Override Controls:

<input type="checkbox"/>	Carrier	Metallic Level	Type	Plan	Ped Dent	Deductible	Office Visits	Inpatient Hospital Services
<input checked="" type="checkbox"/>	Aetna (CA)	Bronze	PPO	CA Bronze MC 100 7000 HSA w/INF	Emb	\$7,000/ \$14,000 embedded	0%	0%
<input checked="" type="checkbox"/>	Aetna (CA)	Bronze	PPO	CA Bronze MC 100/50 7350 w/INF	Emb	\$7,350/ \$14,700 embedded	\$70/\$125 (ded waived)	\$500/admission
<input checked="" type="checkbox"/>	Aetna (CA)	Bronze	PPO	CA Bronze MC 50/50 8300 w/INF	Emb	\$8,300/ \$16,600 embedded	\$85 (ded waived 1st visit) then 0%/\$95	50%

➔ Click on a plan title to view, save or print a full list of benefits.

Clear Filters View Rates Show All Plans Filter Count Details

Plans for E

Manual Override Controls: Uncheck All Uncheck Disqualified Plans Hide Overrides Remove All Overrides

<input type="checkbox"/>	Carrier	Metallic Level	Type	Plan	Ped Dent	Deductible
<input checked="" type="checkbox"/>	Aetna (CA)	Bronze	PPO	CA Bronze MC 100 7000 HSA w/INF	Emb	\$7,000/ \$14,000 emb
<input checked="" type="checkbox"/>	Aetna (CA)	Bronze	PPO	CA Bronze MC 100/50 7350 w/INF	Emb	\$7,350/ \$14,700 emb

➔ Use the column headers to sort your plans for easier selection.

Clear Filters View Rates Show All Plans Filter Count Details Set 1: Plans Selected 0015

Plans for Effective Date: 11/01/2023

Manual Override Controls: Uncheck All Uncheck Disqualified Plans Hide Overrides Remove All Overrides

<input type="checkbox"/>	Carrier	Metallic Level	Type	Plan	Ped Dent	Deductible	Office Visits	Inpatient Hospital Services	Out-of-Pocket Max	Prescription Drugs
<input checked="" type="checkbox"/>	Aetna (CA)	Gold	PPO	CA Gold MC 70/50 1250	Emb	\$1,250/ \$2,500 embedded	\$30/\$50 (ded waived)	30%	\$7,500/ \$15,000 embedded; includes ded	\$300/\$600 Ded (2-4); \$15/\$55/\$80/30%

➔ Select your group's current plans.

Clear Filters View Rates Show All Plans Filter Count Details

Plans for Effective Date: 12/01/2023

Manual Override Controls: Uncheck All Uncheck Disqualified Plans Hide Overrides Remove All Overrides

<input type="checkbox"/>	Carrier	Metallic Level	Type	Plan	Ped Dent	Deductible	Office Visits	Inpatient Hospital Services	Out-of-P
<input checked="" type="checkbox"/>	Aetna (CA)	Bronze	PPO	CA Bronze MC 100 7000 HSA w/INF	Emb	\$7,000/ \$14,000 embedded	0%	0%	\$7,000/ \$14,000 inclu
<input checked="" type="checkbox"/>	Aetna (CA)	Bronze	PPO	CA Bronze MC 100/50 7350 w/INF	Emb	\$7,350/ \$14,700 embedded	\$70/\$125 (ded waived)	\$500/admission	\$8,700/ \$14,000 inclu
<input checked="" type="checkbox"/>	Aetna (CA)	Bronze	PPO	CA Bronze MC 50/50 8300 w/INF	Emb	\$8,300/ \$16,600 embedded	\$85 (ded waived 1st visit) then 0%/\$95	50%	\$8,550/ \$17,100 inclu
<input checked="" type="checkbox"/>	Aetna (CA)	Bronze	PPO	CA Bronze MC 55/50 4600 w/INF	Emb	\$4,600/ \$9,200 embedded	45%	45%	\$8,400/ \$16,800 inclu

Select Plans For Each Employee

→ Click on the Select Plans tab.

1. This screen will show a column for each portfolio you selected.
2. The current portfolio will be listed as the Base Portfolio in the first column.

→ Select a plan for each employee.

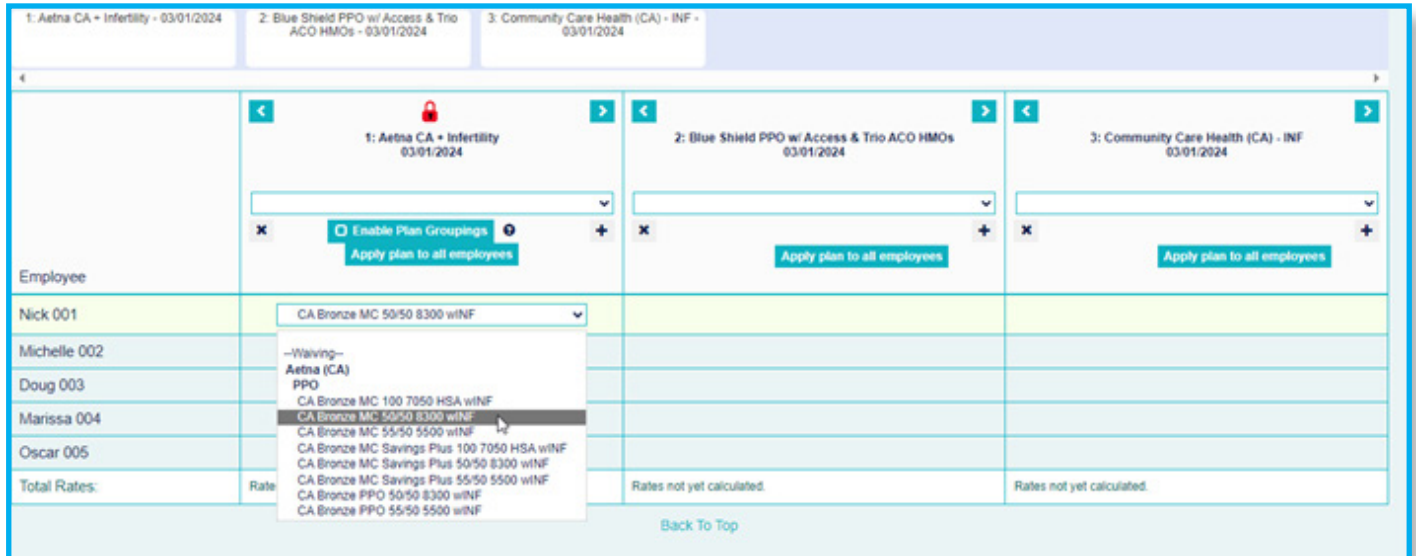


Select a plan from the column's drop-down list. Then click on an employee's name to apply your selection for that employee.

→ Review rates and make any necessary adjustments to your plan selections.

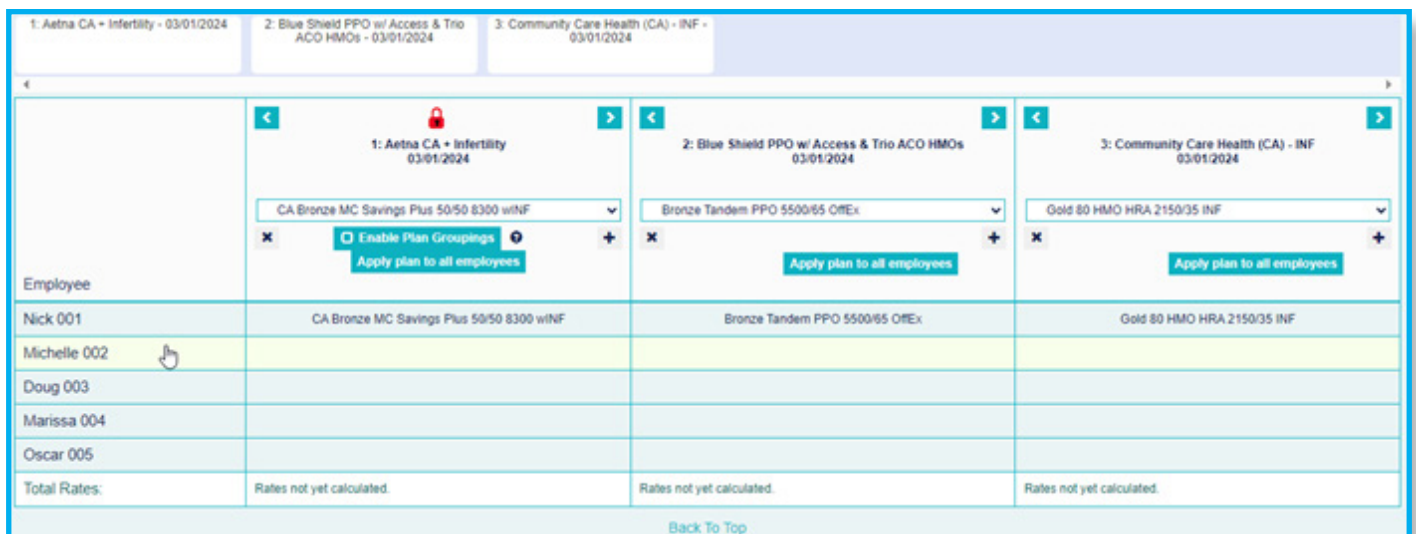
➔ How to apply a plan

Option 1. Individually selecting an employee's plan.



- To apply plans to employees one at a time, click on the cell corresponding with the desired employee and carrier. Then pick their plan from the dropdown.

Option 2. Selecting a plan in the dropdown of multiple portfolios.



- Select a plan from the dropdown of the desired portfolios. Then click on an employee's name to assign the selected plan(s) to that employee.

Option 3. Apply plan to all employees.

1: Aetna CA + Infertility - 03/01/2024 2: Blue Shield PPO w/ Access & Trio ACO HMOs - 03/01/2024 3: Community Care Health (CA) - INF - 03/01/2024			
	<div style="border: 1px solid #ccc; padding: 5px;"> <div style="text-align: center;"> 🔒 1: Aetna CA + Infertility 03/01/2024 </div> <div style="margin-top: 5px;"> <input type="text" value="CA Bronze MC 50/50 8300 w/NF"/> </div> <div style="margin-top: 5px;"> <input checked="" type="checkbox"/> Enable Plan Groupings </div> <div style="margin-top: 5px;"> <input type="button" value="Apply plan to all employees"/> </div> </div>	<div style="border: 1px solid #ccc; padding: 5px;"> <div style="text-align: center;"> 2: Blue Shield PPO w/ Access & Trio ACO HMOs 03/01/2024 </div> <div style="margin-top: 5px;"> <input type="text"/> </div> <div style="margin-top: 5px;"> <input type="button" value="Apply plan to all employees"/> </div> </div>	<div style="border: 1px solid #ccc; padding: 5px;"> <div style="text-align: center;"> 3: Community Care Health (CA) - INF 03/01/2024 </div> <div style="margin-top: 5px;"> <input type="text"/> </div> <div style="margin-top: 5px;"> <input type="button" value="Apply plan to all employees"/> </div> </div>
Employee			
Nick 001	CA Bronze MC 50/50 8300 w/NF		
Michelle 002	CA Bronze MC 50/50 8300 w/NF		
Doug 003	CA Bronze MC 50/50 8300 w/NF		
Marissa 004	CA Bronze MC 50/50 8300 w/NF		
Oscar 005	CA Bronze MC 50/50 8300 w/NF		
Total Rates:	Rates not yet calculated.	Rates not yet calculated.	Rates not yet calculated.

- To quickly place all employees on the same plan, select a plan in a carrier’s dropdown. Then click “Apply plan to all employees.”

Option 4. Enable Plan Groupings

1: Aetna CA + Infertility - 03/01/2024 2: Blue Shield PPO w/ Access & Trio ACO HMOs - 03/01/2024 3: Community Care Health (CA) - INF - 03/01/2024			
	<div style="border: 1px solid #ccc; padding: 5px;"> <div style="text-align: center;"> 🔒 1: Aetna CA + Infertility 03/01/2024 </div> <div style="margin-top: 5px;"> <input type="text"/> </div> <div style="margin-top: 5px;"> <input checked="" type="checkbox"/> Enable Plan Groupings </div> <div style="margin-top: 5px;"> <input type="button" value="Apply plan to all employees"/> </div> </div>	<div style="border: 1px solid #ccc; padding: 5px;"> <div style="text-align: center;"> 2: Blue Shield PPO w/ Access & Trio ACO HMOs 03/01/2024 </div> <div style="margin-top: 5px;"> <input type="text"/> </div> <div style="margin-top: 5px;"> <input type="button" value="Apply Plan to Group(s)"/> </div> <div style="margin-top: 5px;"> <input type="button" value="Select All"/> <input type="button" value="Unselect All"/> </div> </div>	<div style="border: 1px solid #ccc; padding: 5px;"> <div style="text-align: center;"> 3: Community Care Health (CA) - INF 03/01/2024 </div> <div style="margin-top: 5px;"> <input type="text"/> </div> <div style="margin-top: 5px;"> <input type="button" value="Apply Plan to Group(s)"/> </div> <div style="margin-top: 5px;"> <input type="button" value="Select All"/> <input type="button" value="Unselect All"/> </div> </div>
Employee			
Nick 001	CA Bronze MC 50/50 8300 w/NF	<input type="checkbox"/>	<input type="checkbox"/>
Michelle 002	CA Bronze MC 50/50 8300 w/NF	<input type="checkbox"/>	<input type="checkbox"/>
Marissa 004	CA Gold MC 75/50 500 w/NF	<input type="checkbox"/>	<input type="checkbox"/>
Doug 003	CA Silver MC 65/50 2600 w/NF	<input type="checkbox"/>	<input type="checkbox"/>
Oscar 005	CA Silver MC 65/50 2600 w/NF	<input type="checkbox"/>	<input type="checkbox"/>
Total Rates:	Rates not yet calculated.	Rates not yet calculated.	Rates not yet calculated.

Back To Top

- Group employees together who share a common plan in the Base Portfolio, so you can easily apply plans to sets of groups throughout your MPC.

More Customization Options

➔ Click on Set Base & Column Order, and drag the columns into the order you want.

The screenshot shows the 'Set Base & Column Order' interface. At the top, there are tabs for 'Set Base & Column Order' and 'View Rates'. Below the tabs, there are two columns of plan options. The first column is labeled '1: Aetna CA + Infertility - 12/01/2023' and the second is '2: Blue Shield PPO w/ Access & Trio ACO HMOs - 12/01/2023'. Below the columns, there are buttons for 'Enable Plan Groupings' and 'Apply plan to all employees'. The interface also shows a table with employee names (Nick 001, Michelle 002) and their assigned plans. At the bottom, there are 'Total Rates' for each column: \$1101.84 and \$924.57.

The screenshot shows the 'Mobile App Demo' interface. At the top, there are tabs for 'Group Info', 'Census Data (2)', 'Census Worksheet (2)', 'Select Portfolios', and 'Filter Plans'. Below the tabs, there are buttons for 'Set Base & Column Order' and 'View Rates'. A dialog box is overlaid on the interface, titled 'Drag the items into the desired order or click Premium Sort'. The dialog box contains a checkbox for 'Set first column as the base portfolio' and a 'Premium Sort' button. Below the checkbox, there is a list of plans with their respective dates and rates. At the bottom of the dialog box, there are 'Cancel' and 'Save' buttons.

➔ Click on Open/Close Slider to quickly scroll through your columns.

This is especially handy on a tablet so you can swipe to navigate.

The screenshot shows the 'Set Base & Column Order' interface. At the bottom right, there is a small circular icon with a horizontal line through it, which is the 'Open/Close Slider' icon. A red arrow points to this icon.

The screenshot shows the 'Set Base & Column Order' interface. The 'Open/Close Slider' icon is now active, and the interface has shifted to show the second column of plan options. The interface includes buttons for 'Enable Plan Groupings' and 'Apply plan to all employees'. The interface also shows a table with employee names (Nick 001, Michelle 002) and their assigned plans. At the bottom, there are 'Total Rates' for each column: \$1101.84 and \$924.57.

→ Clicking the "+" will allow you to duplicate that existing scenario.

< > 2: Aetna CA + Infertility 12/01/2023 (2)	< > 3: Blue Shield PPO w/ Access & Trio ACO HMOs 12/01/2023 (1)
[Dropdown] ✕ Apply plan to all employees +	[Dropdown] ✕ Apply plan to all employees +
CA Bronze MC 50/50 8300 w/NF	Bronze Tandem PPO 5500/65 OffEx
CA Bronze MC 50/50 8300 w/NF	Bronze Tandem PPO 5500/65 OffEx
Total Rate: \$1101.84 No base portfolio found to compare to.	Total Rate: \$924.57 No base portfolio found to compare to.



You can copy a column and leave the plan selections the same in order to show different contribution scenarios. You can also click on the "X" button to remove a column if you change your mind.

Show Employer Contributions (optional)

→ Click on the Contributions tab.

Group Info	Census Data (2)	Census Worksheet (2)	Select Portfolios	Filter Plans	Select Plans	Contributions	Generate Proposal
Do you want to apply employer contributions? <input type="checkbox"/> No <input checked="" type="checkbox"/> Yes							



If you checked "No" to contributions, or didn't check either "Yes" or "No," the Contributions tab will not be available. Generate Proposal is your next step.

➔ Fill in your employer's contribution settings.

Group Info	Census Data (2)	Census Worksheet (2)	Select Portfolios	Filter Plans	Select Plans	Contributions	Generate Proposal
Medical	Dental	Vision	Life				
<p>Select Global Employer Contributions</p> <p>How will the employer be contributing, a set dollar amount (\$) or a percentage of premium (%)? Percentage ▾</p> <p>How much is the employer contributing toward the employee (EE) rate? <input type="text" value="90"/></p> <p>How much is the employer contributing toward the dependent (Dep) rate? <input type="text"/></p> <p>When the employer contribution is more than the employee rate, will the employer apply the balance to the Dep rate? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No</p> <p>Medical Contribution Base Plan(s)</p> <p>1: Aetna CA + Infertility - 12/01/2023 CA Bronze MC 100/50 7350 w/INF ▾</p> <p>2: Blue Shield PPO w/ Access & Trio ACO HMOs - 12/01/2023 Bronze Full PPO 6500/70 OffEx ▾</p> <p>3: Community Care Health (CA) - INF - 12/01/2023 Platinum 90 HMO 0/10/500 INF ▾</p> <p>Customize Contributions What's this?</p> <p style="text-align: right;">Back To Top</p>							




You can select a fixed dollar amount, a percentage, or no contribution. You can also select a contributory plan, when applicable.


➔ Click **Customize Contributions** when you want to enter different contributions for the portfolios.

Use Global Contribution			What's this?
1: Aetna CA + Infertility - 12/01/2023 (0)	2: Blue Shield PPO w/ Access & Trio ACO HMOs - 12/01/2023 (0)	3: Community Care Health (CA) - INF - 12/01/2023 (0)	
<p>1: Aetna CA + Infertility - 12/01/2023</p> <p>How would you like to contribute? <input checked="" type="radio"/> Aetna CA Contribution - Employer contributes a percentage or a flat dollar amount toward all employee premiums.</p> <p><input type="radio"/> Wrap Contribution - Applies the Wrap Carrier's Contribution to the Additional Carrier's Plans</p> <p>Format: Percentage ▾</p> <p>EE %: <input type="text" value="90"/> (50% - 100%)</p> <p>Dep %: <input type="text"/> (Optional max: 100%)</p> <p><input type="checkbox"/> Apply overflow EE contribution to dependent</p> <p>Apply Toward: CA Bronze MC 100/50 7350 w/INF (optional) ▾</p>	<p>2: Blue Shield PPO w/ Access & Trio ACO HMOs - 12/01/2023</p> <p>How would you like to contribute? <input checked="" type="radio"/> Blue Shield Contribution - Employer contributes a percentage or a flat dollar amount toward all employee premiums.</p> <p><input type="radio"/> Wrap Contribution - Applies the Wrap Carrier's Contribution to the Additional Carrier's Plans</p> <p>Format: Percentage ▾</p> <p>EE %: <input type="text" value="90"/> (50% - 100%)</p> <p>Dep %: <input type="text"/> (Optional max: 100%)</p> <p><input type="checkbox"/> Apply overflow EE contribution to dependent</p> <p>Apply Toward: Bronze Full PPO 6500/70 OffEx (optional) ▾</p>	<p>3: Community Care Health (CA) - INF - 12/01/2023</p> <p>How would you like to contribute? <input checked="" type="radio"/> ER Contribution - Minimum contribution must be at least 50% of the employee's premium for the lowest-priced Community Care Health plan offered by the employer.</p> <p>Format: Percentage ▾</p> <p>EE %: <input type="text" value="90"/> (50% - 100%)</p> <p>Dep %: <input type="text"/> (Optional max: 100%)</p> <p><input type="checkbox"/> Apply overflow EE contribution to dependent</p> <p>Apply Toward: Platinum 90 HMO 0/10/500 INF (optional) ▾</p>	

➔ Click on the Generate Proposal tab to finish your quote.

Group Info	Census Data (2)	Census Worksheet (2)	Select Portfolios	Filter Plans	Select Plans	Contributions	 Generate Proposal
------------	-----------------	----------------------	-------------------	--------------	--------------	---------------	-------------------------------------------------------------------------------------------------------

The data appears complete and the proposal is ready to be generated.


Generate Proposal


➔ Click to select your proposal illustrations and view proposal details.

Group Info	Census Data	Census Worksheet	Select Portfolios	Filter Plans	Select Plans	Contributions	Generate Proposal
------------	-------------	------------------	-------------------	--------------	--------------	---------------	-------------------

Test Group **QuoteID: 4852-4026**

Proposal Completed.
Progress: **100%**

- Cover Page
- Census
- Ineligible Plan Report
- Carrier Premium Comparison Guide
- Multi-Plan Calculator Summary (Grid View)
- Multi-Plan Calculator Detail (Grid View)
- Multi-Plan Calculator Summary (Columnar View)
- Multi-Plan Calculator Detail (Columnar View)
- Medical Benefit and Rate Comparison
- Medical Rate Comparison
- Ancillary Benefit and Rate Comparison
- Ancillary Rate Comparison
- Benefit Summary
- ACA Rate Table

 **Click [here](#) to go to the Quote Details page.**

Click on any item above to view

➔ Select your proposal reports to view, print or email.

View / Print / Email Your Quote

Need Adobe Acrobat Reader? [Download Now](#) Create BYOC Edit This Quote

MPC Reports			General Proposal Reports		
Select	Report Name	PDF Excel	Select	Report Name	PDF Excel
<input type="checkbox"/>	Carrier Premium Comparison Guide	Preview Preview	<input checked="" type="checkbox"/>	Cover Page	Preview
<input type="checkbox"/>	Multi-Plan Calculator Summary (Grid View)	Preview Preview	<input checked="" type="checkbox"/>	Census	Preview Export
<input checked="" type="checkbox"/>	Multi-Plan Calculator Detail (Grid View)	Preview Preview	<input type="checkbox"/>	Ineligible Plan Report	Preview
<input checked="" type="checkbox"/>	Multi-Plan Calculator Summary (Columnar View)	Preview Preview	<input type="checkbox"/>	Benefits & Rates (One Plan Per Page)	Create
<input type="checkbox"/>	Multi-Plan Calculator Detail (Columnar View)	Preview Preview	<input type="checkbox"/>	Benefit Summary	Preview
<input type="checkbox"/>	Medical Benefit and Rate Comparison	Preview Preview	<input checked="" type="checkbox"/>	ACA Rate Table	Preview Preview
<input type="checkbox"/>	Medical Rate Comparison	Preview Preview	<input type="checkbox"/>	Guidelines and Important Features	Preview
<input type="checkbox"/>	Medical Benefit Comparison	Create Create			
<input type="checkbox"/>	Ancillary Benefit and Rate Comparison	Preview Preview			
<input type="checkbox"/>	Ancillary Rate Comparison	Preview Preview			
<input type="checkbox"/>	Ancillary Benefit Comparison	Create Create			

What would you like to do with the selected reports?
 Preview & download the selected reports as one file
 Email a link to the selected reports as one file

What type of file do you want to create?
 PDF Excel Check here to use ZIP format

➔ That's all there is to creating a Multi-Plan Proposal for your client.

Alternative Option: 12/1/2023 (A) Aetna CA + Infertility							Alternative Option: 12/1/2023 (BS) Blue Shield PPO w/ Access & Trio ACO HMOs						
EE Contrib: 90% Dep Contrib: 0% based on CA Bronze MC 100/50 7350 w/INF. Apply Overflow to Dep? No							EE Contrib: 90% Dep Contrib: 0% based on Bronze Full PPO 6500/70 OffEx. Apply Overflow to Dep? No						
Semi-monthly Rate (24 pay periods)							Semi-monthly Rate (24 pay periods)						
Plan	EE's	ER Cost	EE Cost	Dep Cost	Total Premium		Plan	EE's	ER Cost	EE Cost	Dep Cost	Total Premium	
(A) CA Bronze MC 50/50 8300 w/INF	2/2	550.92	0.00	0.00	550.92	(BS) Bronze Tandem PPO 5500/65 OffEx	2/2	462.29	0.00	0.00	0.00	462.29	
Total:		2/2	\$550.92	\$0.00	\$0.00	\$550.92	Total:		2/2	\$462.29	\$0.00	\$0.00	\$462.29

If you need assistance or would like additional training, contact your Warner Pacific Sales Consultant at (800) 801-2300, or email solutions@warnerpacific.com.

About Custom Benefit Comparisons

This type of quote allows you to compare up to 50 plans side by side, in the exact order you want.

Key features of this proposal include:

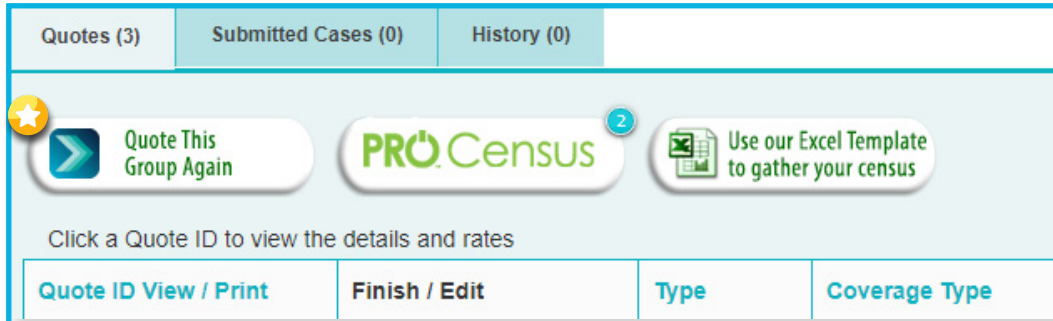
1. Compare current plan to renewal plan.
2. Show an alternative effective date.
3. Enter a custom plan that allows you to specify the benefits and premium.
4. Drag and drop plans in the exact order you want.
5. Show up to five plans per page.
6. Choose which benefits to show and highlight specific benefits.
7. Show total cost differences.
8. Show rates and benefits, rates only, or benefits only.
9. Download in PDF or Excel format.

The Custom Benefit Comparison is the best quoting choice when you want to show an overview of how new plans compare to your group's current plan.

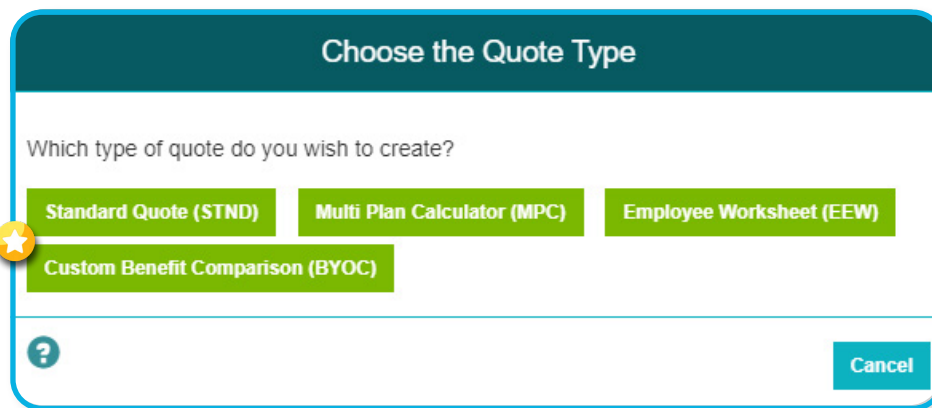
Test Group					
Ventura, Ventura County, CA 93003				SIC Code: 1 - No SIC provided	
Medical	Aetna	Aetna	Aetna	Aetna	Aetna
Monthly Rate (12 pay periods)	CA Gold MC Savings Plus 90/50 3000 HSA Effective Date: 11/1/2023	CA Gold MC Savings Plus 80/50 1500 Effective Date: 11/1/2023	CA Gold MC Savings Plus 70/50 1250 Effective Date: 11/1/2023	CA Gold MC Savings Plus 75/50 500 Effective Date: 11/1/2023	CA Gold MC Savings Plus 80/50 350 M Effective Date: 11/1/2023
Plan Premium:	\$1,251.43	\$1,289.24	\$1,332.63	\$1,417.90	\$1,502.89
DEDUCTIBLE					
Individual	PPO: \$3,000 OON: \$6,000	PPO: \$1,500 OON: \$3,000	PPO: \$1,250 OON: \$2,500	PPO: \$500 OON: \$1,000	PPO: \$350 OON: \$700
Family	PPO: \$6,000 (embedded) OON: \$12,000 (embedded)	PPO: \$3,000 (embedded) OON: \$6,000	PPO: \$2,500 (embedded) OON: \$5,000 (embedded)	PPO: \$1,000 (embedded) OON: \$2,000 (embedded)	PPO: \$700 (embedded) OON: \$1,400 (embedded)
OUT-OF-POCKET MAX					
Individual	PPO: \$3,750 (includes ded) OON: \$7,500 (includes ded)	PPO: \$5,000 (includes ded) OON: \$10,000 (includes ded)	PPO: \$7,500 (includes ded) OON: \$15,000 (includes ded)	PPO: \$8,200 (includes ded) OON: \$16,400 (includes ded)	PPO: \$7,800 (includes ded) OON: \$15,600 (includes ded)
Family	PPO: \$7,500 (embedded; includes ded) OON: \$15,000 (embedded; includes ded)	PPO: \$10,000 (embedded; includes ded) OON: \$20,000 (embedded; includes ded)	PPO: \$15,000 (embedded; includes ded) OON: \$30,000 (embedded; includes ded)	PPO: \$16,400 (embedded; includes ded) OON: \$32,800 (embedded; includes ded)	PPO: \$15,600 (embedded; includes ded) OON: \$31,200 (embedded; includes ded)
PHYSICIAN SERVICES					
Office Visits	PPO: 10% after ded OON: 50% after ded	PPO: \$40/\$45 (ded waived) OON: 50% after ded	PPO: \$30/\$50 (ded waived) OON: 50% after ded	PPO: \$20/\$50 (ded waived) OON: 50% after ded	PPO: \$25/\$50 (ded waived) OON: 50% after ded
Telemedicine	PPO: 0% after ded OON: Not Applicable	PPO: 0% (ded waived) OON: Not Applicable	PPO: 0% (ded waived) OON: Not Applicable	PPO: 0% (ded waived) OON: Not Applicable	PPO: 0% (ded waived) OON: Not Applicable
Preventive Care	PPO: 0% (ded waived) OON: 50% after ded	PPO: 0% (ded waived) OON: 50% after ded	PPO: 0% (ded waived) OON: 50% after ded	PPO: 0% (ded waived) OON: 50% after ded	PPO: 0% (ded waived) OON: 50% after ded
Diagnostic Lab/X-Ray	PPO: 10% after ded OON: 50% after ded	PPO: 20% after ded OON: 50% after ded	PPO: \$30 (ded waived) OON: 50% after ded	PPO: \$50/25% (ded waived) OON: 50% after ded	PPO: \$25/\$65 (ded waived) OON: 50% after ded
Imaging (CT/PET scans, MRIs)	PPO: 10% after ded OON: 50% after ded	PPO: 20% after ded OON: 50% after ded	PPO: 30% after ded OON: 50% after ded	PPO: 25% after ded OON: 50% after ded	PPO: 20% (ded waived) OON: 50% after ded
Rehabilitation/Habilitation (PT/OT/ST)	PPO: 10% after ded OON: 50% after ded	PPO: \$45 (ded waived)/20% after ded OON: 50% after ded	PPO: \$50 (ded waived)/30% after ded OON: 50% after ded	PPO: \$50/25% (ded waived) OON: 50% after ded	PPO: \$25 (ded waived) OON: 50% after ded
Chiropractic Care	PPO: 10% after ded (20 visits per year) OON: 50% after ded	PPO: \$45 (ded waived; 20 visits per year) OON: 50% after ded	PPO: \$50 (ded waived; 20 visits per year) OON: 50% after ded	PPO: \$50 (ded waived; 20 visits per year) OON: Not Covered	PPO: Not Covered OON: Not Covered
PRESCRIPTION DRUGS					

Getting Started

- "Enter New Group Account" or choose the group if it already exists. If you choose a group that already exists, then you choose to "Quote This Group Again" if the group is in PRO Quote. If the group hasn't been quoted, then you choose "Run a Quote."



- Click on Custom Benefit Comparison when prompted.



When you are editing a quote from the Group Info tab, click on Change Quote Type to switch to a Custom Benefit Comparison.

- Select your line of coverage, effective date and fill in your census information, as you would any other quote type.

Group Info	Census Data (2)	Census Worksheet (2)	Select Benefits	Select Portfolios	Filter Plans	Current / Custom Plan	Sort Plans	BYOC Results	Generate Proposal
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Choose Your Benefits

→ Click the **Select Benefits** tab to start creating your custom comparison.

1. Check the benefits you want to highlight.
2. Choose to include or exclude out-of-network benefits.
3. Double click to highlight a benefit category for emphasis in your proposal.

Group Info	Census Data (2)	Census Worksheet (2)	Select Benefits	Select Portfolios	Filter Plans	Current / Custom Plan	Sort Plans	BYOC Results	Generate Proposal
<div style="display: flex; justify-content: space-between; border-bottom: 1px solid #ccc;"> Medical Dental Vision </div> <p>Out of Network Benefits: <input type="radio"/> Include <input checked="" type="radio"/> Exclude</p> <p>Benefit Descriptions: <input type="radio"/> Summary <input checked="" type="radio"/> Detail</p> <div style="display: flex; justify-content: space-between; margin-top: 10px;"> Uncheck All Check All Double click a benefit name to highlight it on reports. </div> <div style="margin-top: 10px;"> <p>Deductible</p> <ul style="list-style-type: none"> <input checked="" type="checkbox"/> Individual <input checked="" type="checkbox"/> Family <p>Out-of-Pocket Max</p> <ul style="list-style-type: none"> <input checked="" type="checkbox"/> Individual <input checked="" type="checkbox"/> Family <p>Physician Services</p> <ul style="list-style-type: none"> <input checked="" type="checkbox"/> Office Visits <input checked="" type="checkbox"/> Telemedicine <input checked="" type="checkbox"/> Preventive Care <input checked="" type="checkbox"/> Diagnostic Lab/X-Ray <input checked="" type="checkbox"/> Imaging (CT/PET scans, MRIs) <input checked="" type="checkbox"/> Rehabilitation/Habilitation (PT/OT/ST) <input checked="" type="checkbox"/> Chiropractic Care <p>Prescription Drugs</p> <ul style="list-style-type: none"> <input checked="" type="checkbox"/> Pharmacy Deductible </div>									



You can select from a large number of benefits. If you want your comparison on one sheet of paper, you may need to uncheck some categories to make it shorter.

Choose Your Carriers

→ Use the Select Portfolios tab to choose the carriers to include in your proposal.

Group Info | Census Data (2) | Census Worksheet (2) | **Select Benefits** | **Select Portfolios** | Filter Plans | Current / Custom Plan | Sort Plans | BYOC Results | Generate Proposal

Medical | Dental | Vision

"Presented By" Text

Do not show 'Presented By' text.

Display 'Presented By' and the following name on my comparison:

Grandmothered / Grandfathered plans are an extension of current coverage and are used for comparison purposes only. They are not...

TIP: Use the Filter Plans tab to choose Metallic Level, Plan Types, Networks and more.

Check All | Uncheck All

Not Selected	Aetna CA + Infertility	PPO	HMO
Not Selected	Aetna CA	PPO	HMO
Selected	Anthem Blue Cross (CA) Prudent Buyer PPO w/ Select HMO/Priority Select HMO	PPO	HMO
Not Selected	Anthem Blue Cross (CA) Prudent Buyer PPO w/ Traditional HMO/Select HMO	PPO	HMO
Not Selected	Anthem Blue Cross (CA) Select PPO w/ Select HMO/Priority Select HMO	PPO	HMO
Not Selected	Anthem Blue Cross (CA) Select PPO w/ Traditional HMO/Select HMO	PPO	HMO
Not Selected	Anthem Network Promo (Includes Vivity HMO Plans) (New Sales - 2 PPO +1 HMO or 2 HMO Networks + both PPO Networks)	PPO	HMO
Not Selected	Anthem Network Promo (New Sales - Select HMO, Priority Select HMO and Vivity HMO alongside both PPO networks)	PPO	HMO
Not Selected	Balance by CCHP (CA)		HMO
Selected	Blue Shield PPO w/ Access HMOs	PPO	HMO



Click on the carrier links to view the plans included in that portfolio.

TIP: Use the Filter Plans tab to choose Metallic Level, Plan Types, Networks and more.

Check All | Uncheck All

Not Selected	Aetna CA + Infertility	PPO	HMO
Not Selected	Aetna CA	PPO	HMO
Selected	Anthem Blue Cross (CA) Prudent Buyer PPO w/ Select HMO/Priority Select HMO	PPO	HMO
Not Selected	Anthem Blue Cross (CA) Prudent Buyer PPO w/ Traditional HMO/Select HMO	PPO	HMO
Not Selected	Anthem Blue Cross (CA) Select PPO w/ Select HMO/Priority Select HMO	PPO	HMO

Click a link to view plans in the portfolio

Choose Your Plans

➔ Use the Filter Plans tab to define your plan selections.

1. The options are based on the carrier portfolios you selected in the previous step.
2. Click the benefit options you want to include in your plan.

Group Info | Census Data (2) | Census Worksheet (2) | Select Benefits | Select Portfolios | **Filter Plans** | Current / Custom Plan | Sort Plans | BYOC Results | Generate Proposal

Medical | Dental | Vision

Now you can apply filters and save them as individual sets!

Viewing

Set 1

Start New Set (5 max)

Remove All Filter Sets

TIP: Scroll down to view and finalize your plan selections.

Carrier Aetna (CA) Blue Shield of CA Community Care

Plan Type PPO HMO EPO

Metallic Level Bronze Silver Gold Platinum

Network HMO Full HMO Limited PPO Full PPO Limited

HSA Eligible Yes No

Deductible \$0-\$499 \$500-\$999 \$1000-\$1499 \$1500-\$1999 \$2000-\$2999 \$3000-\$3999 \$4000-\$4999 \$5000-\$5999 \$6000+

Office Visits 0%-19% 20%-29% 30%-39% 40+% \$0-\$19 \$20-\$29 \$30-\$39 \$40-\$49 \$50-\$59 \$60+

Inpatient Hospital Services 0%-19% 20%-29% 30%-39% 40+% \$1-\$249 \$250-\$500 \$501-\$999 \$1000+

Out-of-Pocket Max \$0-\$1999 \$2000-\$2999 \$3000-\$3999 \$4000-\$4999 \$5000-\$5999 \$6000+

Prescription Drugs Deductible None \$1-\$249 \$250-\$499 \$500+ Combined with Medical

Infertility Yes: Rider Yes: Embed No

Click an option (above) to limit your plans to just what you want to show. [more](#)



The plan design options that appear are tailored to the portfolios you selected. If you change selections on the Select Portfolios tab, the Filter Plans tab will update to match your new selections.

➔ Click on the View Rates button to see each plan's rates.

The screenshot shows a user interface with a green 'View Rates' button highlighted. Above it are 'Clear Filters' and a star icon. To the right are checkboxes for 'Show All Plans' and 'Filter Count Details'. Below the button is a 'Manual Override Controls' section with buttons for 'Uncheck All', 'Uncheck Disqualified Plans', 'Hide Overrides', and 'Remove All Overrides'. A table below shows a single row for 'Aetna (CA)' with a 'Bronze' level, 'PPO' type, and 'CA Bronze MC 100 7000 HSA w/NF' plan. The 'Ped Dent' column shows 'Emb' and '\$7,000'.

The screenshot shows a table titled 'Plans for Effective Date: 12/01/2023'. The table has columns for Carrier, Metallic Level, Type, Plan, Ped Dent, Deductible, Office Visits, Inpatient Hospital Services, Out-of-Pocket Max, Prescription Drugs, Rate, and EE in Area. Three rows are visible, each for 'Aetna (CA)' with a 'Bronze' level and 'PPO' type. The third row is selected with a checkmark.

Carrier	Metallic Level	Type	Plan	Ped Dent	Deductible	Office Visits	Inpatient Hospital Services	Out-of-Pocket Max	Prescription Drugs	Rate	EE in Area
Aetna (CA)	Bronze	PPO	CA Bronze MC 100 7000 HSA w/NF	Emb	\$7,000/ \$14,000 embedded	0%	0%	\$7,000/ \$14,000 embedded; includes ded	MedDed (1-4); 0%	\$1,282.72	2/2
Aetna (CA)	Bronze	PPO	CA Bronze MC 100/50 7350 w/NF	Emb	\$7,350/ \$14,700 embedded	\$70/\$125 (ded waived)	\$500/admission	\$8,700/ \$14,400 embedded; includes ded	MedDed (2-4); \$15/\$85/\$125/40%	\$1,364.07	2/2
Aetna (CA)	Bronze	PPO	CA Bronze MC 50/50 8300 w/NF	Emb	\$8,300/ \$16,600 embedded	\$85 (ded waived 1st visit) then 0%/\$95	50%	\$8,550/ \$17,100 embedded; includes ded	MedDed (2-4); \$30/\$100/\$150/50%	\$1,101.84	2/2

➔ You have the option to select another effective date.

1. This can be especially helpful when you know rates are changing next quarter.

The dialog box has a title 'Compare another effective date?' and a star icon. It contains the text: 'Selecting an alternate effective date will apply to all lines of coverage included in the quote.' Below this are two radio button options: 'No, thank you.' (selected) and 'Yes, include plans selected from the grid above for the following effective date: 01/01/2024'. A dropdown menu is visible next to the date.



You can show up to 50 plans and include plans for all effective dates.

Select Your Group's Current Plan

➔ On the Current/Custom Plan tab, you'll choose the current plan for comparison.

1. You can skip this step if it isn't applicable.
2. Select your effective date and carrier.
3. Check the box next to the plan(s) you want to use for comparison.

Group Info
Census Data (2)
Census Worksheet (2)
Select Benefits
Select Portfolios
Filter Plans
Current / Custom Plan
Sort Plans
BYOC Results
Generate Proposal

Medical
Dental
Vision

Select a prior effective date to compare.
 Enter custom plan, benefits and rates.
 Do not include current coverage.

Effective:

Portfolio:

Non-ACA Compliant

Set 1: Plans Selected
0011
Find Plans Q

Check All
Uncheck All

Check	Carrier	Metallic Level	Plan Type	Plan Name	Ped Dent	Deductible	Office Visits	Inpatient Hospital Services	Out-of-Pocket Max	Prescription Drugs
<input checked="" type="checkbox"/>	Anthem Blue Cross (CA)	Bronze	PPO	Anthem Bronze PPO 40/6200/40% (9KG2)	Emb	\$6,200/ \$12,400 embedded	\$40/\$80	40%	\$8,700/ \$17,400 embedded; includes ded	MedDed (2-4); \$20/80/120/30%; \$20/90/130/40%
<input checked="" type="checkbox"/>	Anthem Blue Cross (CA)	Bronze	PPO	Anthem Bronze PPO 4600/50% (9B1L)	Emb	\$4,600/ \$9,200 embedded	50%	50%	\$8,100/ \$16,200 embedded; includes ded	MedDed (2-4); \$20/80/120/30%; \$20/90/130/40%
<input type="checkbox"/>	Anthem Blue Cross (CA)	Bronze	PPO	Anthem Bronze PPO 60/6850/40% (9B2D)	Emb	\$6,850/ \$13,700 embedded	\$60/\$80	40%	\$8,200/ \$16,400 embedded; includes ded	\$650/\$1,300 (2-4); \$20/90/160/30%; \$20/100/170/40%



To seamlessly convert an existing quote to a BYOC, click the "Create BYOC" button on the quote details page of an existing quote.

Back To Quotes
Insurance Labs

ID	Effective Date	Employees Included	HQ Zip	SIC	Created
Q-5053-7986	3/1/2024	1	91311	1: No SIC provided	2/5/2024 by Broker, Test M. (TestingWorld)

Optional - Enter a note for this Quote to easily identify it later

Medical Coverage: Silver & Gold

Save Quote Notes

View / Print / Email Your Quote
Create BYOC
Edit This Quote

Standard Reports

Select	Report Name	PDF	Excel
<input type="checkbox"/>	Carrier Premium Comparison Guide	Preview	Preview
<input type="checkbox"/>	Grand Summary	Preview	Preview
<input type="checkbox"/>	Medical Benefit and Rate Comparison	Preview	Preview
<input type="checkbox"/>	Medical Rate Comparison	Preview	Preview
<input type="checkbox"/>	Medical Benefit Comparison	Create	Create

Rates Per Employee Reports +

General Proposal Reports

Select	Report Name	PDF	Excel
<input type="checkbox"/>	Cover Page	Preview	
<input type="checkbox"/>	Census	Preview	Export
<input type="checkbox"/>	Ineligible Plan Report	Preview	
<input type="checkbox"/>	Benefits & Rates (One Plan Per Page)	Create	
<input type="checkbox"/>	Benefit Summary	Preview	
<input type="checkbox"/>	ACA Rate Table	Preview	Preview
<input type="checkbox"/>	Guidelines and Important Features	Preview	

What would you like to do with the selected reports?

1. When a group's current plan is not in Warner's PRO Quote tool, the *Custom Plan* option allows one plan per BYOC to be built for comparison.
2. Input the *Carrier Name*, *Plan Title* and *Effective Date* sections.

3. Fill in the benefits for your *Custom Plan*. As a *Custom Plan*, you only need to fill in the benefits you are interested in comparing.



Using the Select Template Plan dropdown, you can copy the benefits of another plan from your quote as a head start to filling in your Custom Plan's benefits.

4. Input current employee and dependent rates for each employee.

Custom Rate Values

If you do not have individual rates you can simply enter the total plan premium.

Applicant	Age	Tier	Area	EE	Dep
Employee 001	25	ES	<input type="text"/>	<input type="text"/>	<input type="text"/>
Employee 002	42	EE	<input type="text"/>	<input type="text"/>	<input type="text"/>
Employee 003	36	FA	<input type="text"/>	<input type="text"/>	<input type="text"/>
Employee 004	21	EE	<input type="text"/>	<input type="text"/>	<input type="text"/>
Employee 005	53	EE	<input type="text"/>	<input type="text"/>	<input type="text"/>
Total Plan Premium				<input type="text"/>	

Set Your Sort Order

➔ The Sort Plans tab offers two options: preset sorting and custom sorting.

- To use preset sorting, select the option you want from the drop-down list below *Sort Options*. Then click the *Apply Sort* button.
- You can also use *Custom Sort* to rearrange your plans. Drag the double arrows to move the plans into the order you want.

Group Info
Census Data (2)
Census Worksheet (2)
Select Benefits
Select Portfolios
Filter Plans
★
Current / Custom Plans
Sort Plans
BYOC Results
Generate Proposal

Sort Options

Sort by:

★
Premium Only
Carrier / Metallic Level
Carrier / Metallic Level / Plan Type*
Carrier / Plan Type*
Carrier / Plan Type / Metallic Level

* Examples of Plan Types: PPO, HMO

Carrier Sort:

Alphabetical Order

Exchange Plans First

Exchange Plans Last

Premium Sort:

Premium Ascending

Premium Descending

Apply Sort ⌵

Output Options

Plans per Page: 5

Pay periods: 12 (Monthly) ?

Medical
Dental
Vision

Custom Sort

Sort your plan by dragging a row selector (⌵) up or down.

Base Plan: Anthem Blue Cross (CA) Anthem Bronze PPO 40/6200/40% (9KG2) (1/1/2024) ?

Carrier	Metallic Level	Plan Type	Plan Name	Ped Dent	Deductible	Office Visits	Inpatient Hospital Services	Out-of-Pocket Max	Prescription Drugs
Anthem Blue Cross (CA) (1/1/2024)	Bronze	PPO	Anthem Bronze PPO 40/6200/40% (9KG2)	Emb	\$6,200/ \$12,400 embedded	\$40/\$80	40%	\$8,700/ \$17,400 embedded; includes ded	MedDed (2-4); \$20/80/120/30%; \$20/90/130/4

➔ **Set your output options**

1. Select between 2 to 5 plans per page.
2. Choose monthly, semi-monthly, bi-weekly or weekly for premium calculation.

Output Options

★
Plans per Page:

★
Pay periods:
?

Preview Your Proposal

➔ **Click on the BYOC Results tab to view all your plans, rates and benefits.**

1. Use the applicable tab to make any changes to your benefit, plan or sort choices.

Group Info	Census Data (2)	Census Worksheet (2)	Select Benefits	Select Portfolios	Filter Plans	Current / Custom Plan	Sort Plans	★ BYOC Results	Generate Proposal																				
<div style="display: flex; justify-content: space-around; margin-bottom: 10px;"> Medical Dental Vision </div>																													
<p>Nick's Test Group</p> <table border="1" style="width: 100%; border-collapse: collapse; margin-top: 10px;"> <thead> <tr> <th style="width: 20%;"></th> <th style="width: 20%; text-align: center;">Anthem BC Anthem Bronze PPO 40/6200/40% (9KG2) PPO / Bronze 1/1/2024</th> <th style="width: 20%; text-align: center;">Anthem BC Anthem Bronze PPO 70/6600/35% (6RFV) PPO / Bronze 12/1/2023</th> <th style="width: 20%; text-align: center;">Anthem BC Anthem Bronze PPO 40/6200/40% (6RJN) PPO / Bronze 12/1/2023</th> <th style="width: 20%; text-align: center;">Anthem BC Anthem Bronze PPO 6000/45% w/HSA PrevRx (6RJK) PPO / Bronze 12/1/2023</th> </tr> </thead> <tbody> <tr> <td colspan="5" style="padding: 5px;">DEDUCTIBLE</td> </tr> <tr> <td style="padding: 5px;">Individual:</td> <td style="padding: 5px;">PPO: \$6,200</td> <td style="padding: 5px;">PPO: \$6,600</td> <td style="padding: 5px;">PPO: \$6,200</td> <td style="padding: 5px;">PPO: \$6,000</td> </tr> <tr> <td style="padding: 5px;">Family:</td> <td style="padding: 5px;">PPO: \$12,400 (embedded)</td> <td style="padding: 5px;">PPO: \$13,200 (embedded)</td> <td style="padding: 5px;">PPO: \$12,400 (embedded)</td> <td style="padding: 5px;">PPO: \$12,000 (embedded)</td> </tr> </tbody> </table>											Anthem BC Anthem Bronze PPO 40/6200/40% (9KG2) PPO / Bronze 1/1/2024	Anthem BC Anthem Bronze PPO 70/6600/35% (6RFV) PPO / Bronze 12/1/2023	Anthem BC Anthem Bronze PPO 40/6200/40% (6RJN) PPO / Bronze 12/1/2023	Anthem BC Anthem Bronze PPO 6000/45% w/HSA PrevRx (6RJK) PPO / Bronze 12/1/2023	DEDUCTIBLE					Individual:	PPO: \$6,200	PPO: \$6,600	PPO: \$6,200	PPO: \$6,000	Family:	PPO: \$12,400 (embedded)	PPO: \$13,200 (embedded)	PPO: \$12,400 (embedded)	PPO: \$12,000 (embedded)
	Anthem BC Anthem Bronze PPO 40/6200/40% (9KG2) PPO / Bronze 1/1/2024	Anthem BC Anthem Bronze PPO 70/6600/35% (6RFV) PPO / Bronze 12/1/2023	Anthem BC Anthem Bronze PPO 40/6200/40% (6RJN) PPO / Bronze 12/1/2023	Anthem BC Anthem Bronze PPO 6000/45% w/HSA PrevRx (6RJK) PPO / Bronze 12/1/2023																									
DEDUCTIBLE																													
Individual:	PPO: \$6,200	PPO: \$6,600	PPO: \$6,200	PPO: \$6,000																									
Family:	PPO: \$12,400 (embedded)	PPO: \$13,200 (embedded)	PPO: \$12,400 (embedded)	PPO: \$12,000 (embedded)																									

Employee Rate Data																		
		Anthem BC Anthem Bronze PPO 40/6200/40% (9KG2) PPO / Bronze 1/1/2024				Anthem BC Anthem Bronze PPO 70/6600/35% (6RFV) PPO / Bronze 12/1/2023				Anthem BC Anthem Bronze PPO 40/6200/40% (6RJN) PPO / Bronze 12/1/2023				Anthem BC Anthem Bronze PPO 6000/45% w/HSA PrevRx (6RJK) PPO / Bronze 12/1/2023				
Name	Age	Dep	Area	Emp	Dep	Total	Area	Emp	Dep	Total	Area	Emp	Dep	Total	Area	Emp	Dep	Total
Nick 001	35	EE	CA16	\$235.36	\$0.00	\$235.36	CA16	\$230.15	\$0.00	\$230.15	CA16	\$231.20	\$0.00	\$231.20	CA16	\$235.96	\$0.00	\$235.96
Michelle 002	40	EE	CA16	\$246.15	\$0.00	\$246.15	CA16	\$240.70	\$0.00	\$240.70	CA16	\$241.79	\$0.00	\$241.79	CA16	\$246.77	\$0.00	\$246.77
Semi-monthly Totals:				\$481.51	\$0.00	\$481.51	\$470.85	\$0.00	\$470.85	\$472.99	\$0.00	\$472.99	\$482.73	\$0.00	\$482.73			
% Difference:				0%			(2.2%)			(1.8%)			0.3%					
\$ Difference:				\$0.00			(\$10.66)			(\$8.52)			\$1.22					




If you don't see the percent and dollar differences in your proposal preview, go back to the Sort Plans tab to set your base plan.


Finish Your Quote

➔ Click the **Generate Proposal** button to finish your quote.

1. If you see the Fix Errors message, fix any errors and click the Generate Proposal button again.

Group Info	Census Data (2)	Census Worksheet (2)	Select Benefits	Select Portfolios	Filter Plans	Current / Custom Plan	Sort Plans	BYOC Results	 Generate Proposal
The data appears complete and the proposal is ready to be generated.									
Generate Proposal									

➔ Click [here](#) to view proposal details.

Group Info	Census Data	Census Worksheet	Select Benefits	Select Portfolios	Filter Plans
<p>Nick's Test Group QuoteID: 5009-2445</p> <p>Proposal Completed. Progress: 100%</p> <p>Cover Page</p> <p>Census</p> <p>Ineligible Plan Report</p> <p>Carrier Premium Comparison Guide</p> <p>Grand Summary</p> <p>Medical Benefit and Rate Comparison</p> <p>Medical Rate Comparison</p> <p>Ancillary Benefit and Rate Comparison</p> <p>Ancillary Rate Comparison</p> <p>Benefit Summary</p> <p>ACA Rate Table</p> <p> Click here to go to the Quote Details page.</p> <p>Click on any item above to view</p>					

➔ Select reports to view, print or email to your client.

View / Print / Email Your Quote

Need Adobe Acrobat Reader? [Download Now](#) Create BYOC Edit This Quote

Benefit Comparison Reports			General Proposal Reports		
Select	Report Name	PDF Excel	Select	Report Name	PDF Excel
<input type="checkbox"/>	Carrier Premium Comparison Guide	Preview Preview	<input checked="" type="checkbox"/>	Cover Page	Preview
<input checked="" type="checkbox"/>	Grand Summary	Preview Preview	<input checked="" type="checkbox"/>	Census	Preview Export
<input checked="" type="checkbox"/>	Medical Benefit and Rate Comparison	Preview Preview	<input type="checkbox"/>	Ineligible Plan Report	Preview
<input type="checkbox"/>	Medical Rate Comparison	Preview Preview	<input type="checkbox"/>	Benefits & Rates (One Plan Per Page)	Create
<input type="checkbox"/>	Medical Benefit Comparison	Create Create	<input type="checkbox"/>	Benefit Summary	Preview
<input type="checkbox"/>	Ancillary Benefit and Rate Comparison	Preview Preview	<input checked="" type="checkbox"/>	ACA Rate Table	Preview Preview
<input type="checkbox"/>	Ancillary Rate Comparison	Preview Preview	<input type="checkbox"/>	Guidelines and Important Features	Preview
<input type="checkbox"/>	Ancillary Benefit Comparison	Create Create			
<input type="checkbox"/>	Rates Per Employee Without Benefits	Create			
<input type="checkbox"/>	Rates Per Employee Without Benefits in Spanish	Create			
<input type="checkbox"/>	Rates Per Employee With Benefits	Create			
<input type="checkbox"/>	Rates Per Employee With Benefits in Spanish	Create			

Please select Create to access individual Rates Per Employee Reports

What would you like to do with the selected reports?
 Preview & download the selected reports as one file
 Email a link to the selected reports as one file

What type of file do you want to create?
 PDF Excel
 Check here to use ZIP format
[Open File](#)

If you need assistance or would like additional training,
 contact your Warner Pacific Sales Consultant at (800) 801-2300,
 or email solutions@warnerpacific.com.

About Employee Worksheets


Warner Pacific’s Employee Worksheets offer flexible options, so you can choose the options that suit your needs.

Some of those options include:

1. Choose to feature only the plans being offered
2. Illustrate multiple lines of coverage in a single quote
3. Set contributions for each line of coverage
4. Select the number of pay periods illustrated
5. Worksheets are available with and without benefits
6. Print a worksheet for the group, or for just one employee

Employee Worksheets are your best choice when the sale is complete and you’re ready to conduct your enrollment meeting, or when you have a new hire.

This guide will walk you through the steps for using Employee Worksheets.

MEDICAL		Anthem 	Anthem Blue Cross (CA) Prudent Buyer PPO w/ Select HMO/Priority Select HMO		
Effective Date: 1/1/2024					
Employee 002					
Female, Age: 35, Home Zip Code: 90001, Los Angeles County					
Spouse/Partner: N/A, Child(ren): N/A					
These rates reflect your cost after your employer’s contribution of 100% toward employee and 0% toward dependent(s) based on Anthem BC - Anthem Silver Priority Select HMO 55 (9B2Z) rates and are for an Effective Date of 1/1/2024.					
Any remaining employer contribution dollars have been applied to the dependent premium, where dependent coverage is indicated.					
The Contribution amounts listed on this report may not reflect actual final contribution totals.					
New Hire Worksheet Enrollment Date: 1/1/2024					
Monthly Rate (12 pay periods)	Area	Employee Cost Breakdown		Dependent Cost Breakdown	
Anthem Bronze PPO 40/6200/40% (9KG2)	CA16	Employee:	470.71	Ped. Dental:	Embedded
\$51.52		Ped. Dental:	Embedded	Employer Pays:	(0.00)
PPO/Bronze/ Prudent Buyer PPO		Employer Pays:	(419.19)	Enrollee Pays:	0.00
Anthem Bronze PPO 4600/50% (9B1L)	CA16	Employee:	494.96	Ped. Dental:	Embedded
\$75.77		Ped. Dental:	Embedded	Employer Pays:	(0.00)
PPO/Bronze/ Prudent Buyer PPO		Employer Pays:	(419.19)	Enrollee Pays:	0.00
Anthem Silver PPO 45/1750/40% (9KFJ)	CA16	Employee:	539.42	Ped. Dental:	Embedded
\$120.23		Ped. Dental:	Embedded	Employer Pays:	(0.00)
PPO/Silver/ Prudent Buyer PPO		Employer Pays:	(419.19)	Enrollee Pays:	0.00
Anthem Silver PPO 45/1750/40% WH (9B3B)	CA16	Employee:	553.85	Ped. Dental:	Embedded
\$134.66		Ped. Dental:	Embedded	Employer Pays:	(0.00)
PPO/Silver/ Prudent Buyer PPO		Employer Pays:	(419.19)	Enrollee Pays:	0.00
Anthem Gold PPO 25/30% RxD (9B1F)	CA16	Employee:	646.55	Ped. Dental:	Embedded
\$227.36		Ped. Dental:	Embedded	Employer Pays:	(0.00)
PPO/Gold/ Prudent Buyer PPO		Employer Pays:	(419.19)	Enrollee Pays:	0.00
		Enrollee Pays:	227.36	Enrollee Pays:	0.00

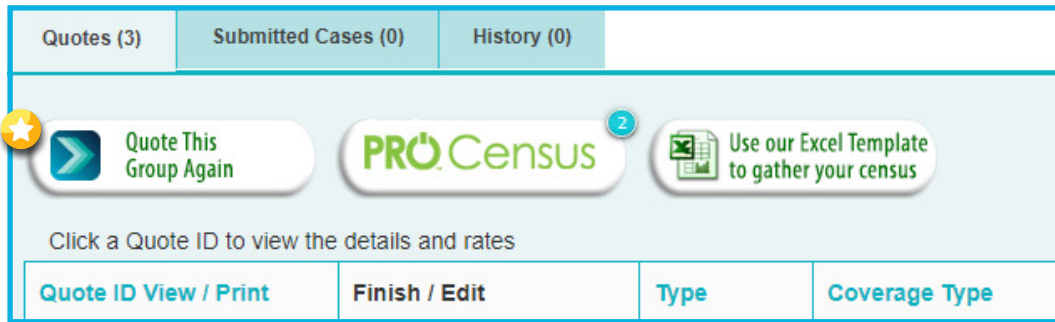
Getting started

Employee Worksheets are the answer for illustrating each employee’s cost based on the employer’s contribution. Each employee will have their own sheet to help them make their plan and dependent coverage selections.



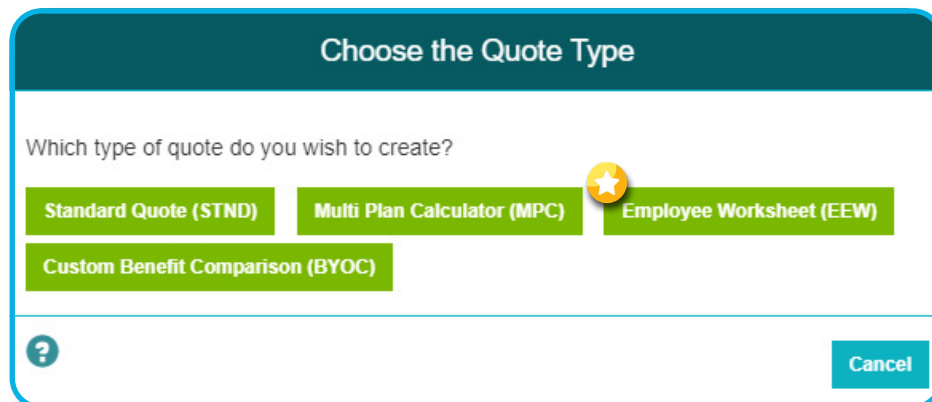
Check Medical, Dental, Vision and/or Life on the Group Info step to show them all on one sheet.

- ➔ **"Enter New Group Account," or choose the group if it already exists. If you choose a group that already exists, then you choose to "Quote This Group Again" if the group is in PRO Quote. If the group hasn't been quoted, then you choose "Run a Quote."**



- ➔ **Click on Employee Worksheet when prompted.**

1. Select your line of coverage, effective date, and fill in your census information, as you would any other quote type.



➔ Select the plan package being offered to the group.



You can create New Hire Worksheets here too! This will calculate the employee and dependents' ages based on carrier guidelines!

➔ If you are quoting a new hire, choose Yes below. Secondly, choose the Enrollment Date, the date when the new hire will be eligible for their benefits.

➔ Check the plans your employer is offering.

Uncheck All Check All Limit plans to: Bronze: Silver: Gold: Platinum:

Anthem Blue Cross (CA) Prudent Buyer PPO w/ Select HMO/Priority Select HMO

Bronze Uncheck All Check All

<input checked="" type="checkbox"/> Anthem Bronze PPO 40/6200/40% (9KG2)	<input checked="" type="checkbox"/> Anthem Bronze PPO 4600/50% (9B1L)	<input type="checkbox"/> Anthem Bronze PPO 60/6850/40% (9B2D)	<input type="checkbox"/> Anthem Bronze PPO 6000/45% w/HSA PrevRx WH (9KFN)	<input type="checkbox"/> Anthem Bronze PPO 6700/0% w/HSA PrevRx (9KG9)	<input type="checkbox"/> Anthem Bronze PPO 6700/0% w/HSA PrevRx WH (9KF9)	<input type="checkbox"/> Anthem Bronze PPO 75/7300/40% (9KF2)
--------------------------------------------------------------------------	-----------------------------------------------------------------------	---------------------------------------------------------------	----------------------------------------------------------------------------	------------------------------------------------------------------------	---------------------------------------------------------------------------	---------------------------------------------------------------

Silver Uncheck All Check All

<input checked="" type="checkbox"/> Anthem Silver PPO 45/1750/40% (9KFJ)	<input checked="" type="checkbox"/> Anthem Silver PPO 45/1750/40% WH (9B3B)	<input type="checkbox"/> Anthem Silver PPO 50/2200/40% (9B2Q)	<input type="checkbox"/> Anthem Silver PPO 55/2500/45% (9B1X)	<input type="checkbox"/> Anthem Silver PPO 55/2500/45% WH (9KFV)	<input type="checkbox"/> Anthem Silver PPO HSA/H 2100/3200/4200 30% PrevRx (9B29/9B35)	<input type="checkbox"/> Anthem Silver Priority Select HMO 55 (9B2Z)	<input type="checkbox"/> Anthem Silver Priority Select HMO 60/2500/45% (9B1J)	<input checked="" type="checkbox"/> Anthem Silver Priority Select HMO 60/2500/45% WH (9KEZ)	<input type="checkbox"/> Anthem Silver Select HMO 60/2500/45% (9KGB)	<input type="checkbox"/> Anthem Silver Select HMO 60/2500/45% WH (9B1C)
--------------------------------------------------------------------------	-----------------------------------------------------------------------------	---------------------------------------------------------------	---------------------------------------------------------------	------------------------------------------------------------------	----------------------------------------------------------------------------------------	----------------------------------------------------------------------	-------------------------------------------------------------------------------	---------------------------------------------------------------------------------------------	----------------------------------------------------------------------	-------------------------------------------------------------------------

Gold Uncheck All Check All

<input checked="" type="checkbox"/> Anthem Gold PPO 25/30% (9B25)	<input checked="" type="checkbox"/> Anthem Gold PPO 25/30% RxD (9B1F)	<input type="checkbox"/> Anthem Gold PPO 30/500/20% (9KF1)	<input type="checkbox"/> Anthem Gold PPO 30/500/20% (9KF1)	<input type="checkbox"/> Anthem Gold PPO 30/500/20% (9KF1)	<input type="checkbox"/> Anthem Gold PPO 30/500/20% (9KF1)
-------------------------------------------------------------------	-----------------------------------------------------------------------	------------------------------------------------------------	------------------------------------------------------------	------------------------------------------------------------	------------------------------------------------------------

➔ You can filter medical plans by Metallic level.

Uncheck All Check All Limit plans to: Bronze: Silver: Gold: Platinum:

Anthem Blue Cross (CA) Prudent Buyer PPO w/ Select HMO/Priority Select HMO

Worksheet Options

➔ Click to set Worksheet Option

Customize Your Quote!

Narrow Plan Selections / Preview Rates Narrow Benefit Selections Set Sort Order and other options Brand Your Quote

➔ You can select the number of pay periods, rather than showing monthly premium.

Calculate Rates per Employee Report premiums using the following number of pay periods:

12 (Monthly) 12 (Monthly) 24 (Semi-monthly) 26 (Bi-weekly) 52 (Weekly)



You can set Pay Periods from the Group tab too.



You can select a fixed dollar amount, percentage, or no contribution. You can also apply the percentage contribution to a specific plan.

Contribution Options

→ Select the way the employer is contributing.

Anthem Blue Cross (CA) Prudent Buyer PPO w/ Select HMO/Priority Select HMO

How would you like to contribute?

Anthem Blue Cross (CA) Contribution - A minimum of 50% of the premium or any fixed amount of \$100.00 or greater.

Wrap Contribution - Applies the Wrap Carrier's Contribution to the Additional Carrier's Plans

Format: ★ No Contribution ▼

No Contribution

Percentage

Amount

Uncheck All
Check All

→ You can set the contribution for the Carrier and Wrapped Carrier together, separately, or apply a contribution to just the Carrier and/or Wrapped Carrier.

Anthem Blue Cross (CA) Prudent Buyer PPO w/ Select HMO/Priority Select HMO

How would you like to contribute?

Anthem Blue Cross (CA) Contribution - A minimum of 50% of the premium or any fixed amount of \$100.00 or greater.

Wrap Contribution - Applies the Wrap Carrier's Contribution to the Additional Carrier's Plans

Format: Percentage ▼

EE %: 100 (50% - 100%)

Dep %: (Optional max: 100%)

Apply overflow EE contribution to dependent

Apply Toward: Anthem Silver Priority Select HMO 55 (9B2Z) ▼
(optional)

Kaiser Wrap

How would you like to contribute?

Kaiser Wrap - Enables employer to contribute a fixed dollar amount, or 50-100% of the premium.

Kaiser Wrap - Applies the Additional Medical Carrier's Contribution to the Kaiser Wrap Plans

Format: Percentage ▼

EE %: 100 (50% - 100%)

Dep %: (Optional)

Apply overflow EE contribution to dependent

Apply Toward: Silver 70 HDHP HMO 2850/25% + Child Dental ▼
(optional)



Only carriers available for wrapping will be listed.


→ When the employer is contributing a percentage, you can choose a specific base plan or apply the contribution towards all plans.


Anthem Blue Cross (CA) Prudent Buyer PPO w/ Select HMO/Priority Select HMO

How would you like to contribute?

Anthem Blue Cross (CA) Contribution - A minimum of 50% of the premium or any fixed amount of \$100.00 or greater.


Wrap Contribution - Applies the Wrap Carrier's Contribution to the Additional Carrier's Plans

 **Format:**

 **EE %:** (50% - 100%)

Dep %: (Optional max: 100%)

Apply overflow EE contribution to dependent

 **Apply Toward:**

Anthem Platinum PPO 5/200/15% (9KGJ)

Anthem Platinum PPO 5/200/15% WH (9KF8)

HMO

Anthem Silver Priority Select HMO 55 (9B2Z)

Anthem Silver Priority Select HMO 60/2500/45% (9B1J)

Anthem Silver Priority Select HMO 60/2500/45% WH (9KEZ)

Anthem Silver Select HMO 55 (9KG7)

Anthem Silver Select HMO 60/2500/45% (9KGB)

Uncheck All
Check All

→ Check if Employee Premium Contribution should roll over to Dependent Premium.

Anthem Blue Cross (CA) Prudent Buyer PPO w/ Select HMO/Priority Select HMO

How would you like to contribute?


Anthem Blue Cross (CA) Contribution - A minimum of 50% of the premium or any fixed amount of \$100.00 or greater.

Wrap Contribution - Applies the Wrap Carrier's Contribution to the Additional Carrier's Plans

Format:

EE %: (50% - 100%)

Dep %: (Optional max: 100%)

 Apply overflow EE contribution to dependent

Apply Toward:

(optional)

➔ You can print worksheets for COBRA participants

1. These will be shown at full premium. PRO Quote doesn't calculate COBRA rating (i.e., Federal vs. State).

Would you like an Enrollment Worksheet for COBRA participants (employer contributions are not applied to premium for COBRA participants): Yes No

Sending Out Your Worksheets

➔ Click on Generate Proposal to finish your quote.

Group Info	Census Data(2)	Census Worksheet (2)	Select Plans	Generate Proposal
Medical	Dental	Vision	Life	

➔ Select your proposal reports to View, Print, or Email.

View / Print / Email Your Quote

Need Adobe Acrobat Reader? [Download Now](#) [Create BYOC](#) [Edit This Quote](#)

Worksheet Reports			General Proposal Reports		
Select	Report Name	PDF Excel	Select	Report Name	PDF Excel
<input checked="" type="checkbox"/>	Carrier Premium Comparison Guide	Preview Preview	<input checked="" type="checkbox"/>	Cover Page	Preview
<input type="checkbox"/>	Grand Summary	Preview Preview	<input checked="" type="checkbox"/>	Census	Preview Export
<input checked="" type="checkbox"/>	Medical Benefit and Rate Comparison	Preview Preview	<input type="checkbox"/>	Ineligible Plan Report	Preview
<input type="checkbox"/>	Medical Rate Comparison	Preview Preview	<input type="checkbox"/>	Benefits & Rates (One Plan Per Page)	Create
<input type="checkbox"/>	Medical Benefit Comparison	Create Create	<input type="checkbox"/>	Benefit Summary	Preview
<input type="checkbox"/>	Employee Worksheet Without Benefits	Preview Preview	<input checked="" type="checkbox"/>	ACA Rate Table	Preview Preview
<input type="checkbox"/>	Employee Worksheet Without Benefits in Spanish	Preview Preview	<input type="checkbox"/>	Guidelines and Important Features	Preview
<input checked="" type="checkbox"/>	Employee Worksheet With Benefits	Preview Preview			
<input type="checkbox"/>	Employee Worksheet With Benefits in Spanish	Preview Preview			

What would you like to do with the selected reports?

Preview & download the selected reports as one file

Email a link to the selected reports as one file

[Click here to access Individual employee worksheets.](#)

What type of file do you want to create? PDF Excel Check here to use ZIP format

→ You can print a Worksheet for employee(s)

1. Select your format and check the language desired for each employee.
2. Your download will include one file per employee.
3. You may need to scroll down to see the census section.

Census

Download individual employee worksheets by customizing your selections.

Preferred Format: Worksheet with benefits
 Worksheet without benefits

Preferred File: Acrobat (PDF)
 Excel (XLS)

Employees Included in this Quote

Employee Name	Age/DOB	Dep Count	Medical	Gender	County	ST	Zip	Note	English	Spanish
									Unselect all	Select all
Employee 001	28	0	EE	F	Los Angeles	CA	91601		English	Spanish
Employee 002	35	0	EE	F	Los Angeles	CA	90001		English	Spanish
Employee 003	42	0	EE	F	Los Angeles	CA	90405		English	Spanish
Employee 004	55	0	EE	F	Los Angeles	CA	90293		English	Spanish
Employee 005	38	0	EE	F	Los Angeles	CA	90296		English	Spanish
Employee 006	48	0	EE	M	Los Angeles	CA	90290		English	Spanish
Employee 007	36	0	EE	M	Los Angeles	CA	90502		English	Spanish
Employee 008	52	0	EE	M	Los Angeles	CA	91602		English	Spanish
Employee 009	42	0	EE	M	Los Angeles	CA	91522		English	Spanish
Employee 010	38	0	EE	M	Los Angeles	CA	91603		English	Spanish

[Download](#)



Worksheets are available to print any time after you generate your proposal – even days or weeks later!

Illustration of Worksheet Details

→ Employee and Dependent details


[Redacted]

Female, DOB: 09-04-1979, Home Zip Code: 91205, Los Angeles County
 Spouse/Partner: M, DOB: 12-05-1977, Child(ren): DOB: 07-06-2010

➔ Employer Contribution Description

These rates reflect your cost after your employer's contribution of 100% toward employee and 0% toward dependent(s) based on Anthem BC - Anthem Silver Priority Select HMO 55 (55TF) rates and are for an Effective Date of 5/1/2021.
 Any remaining employer contribution dollars have been applied to the dependent premium, where dependent coverage is indicated.
 The Contribution amounts listed on this report may not reflect actual final contribution totals.

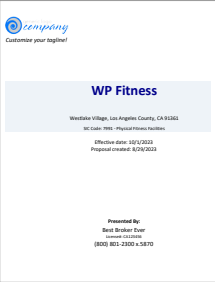




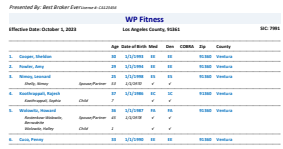




















➔ Member-level rates for each plan

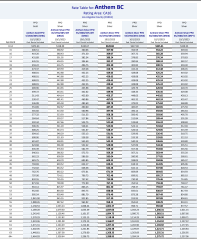





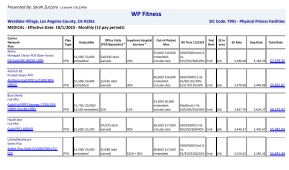










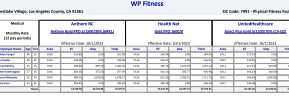





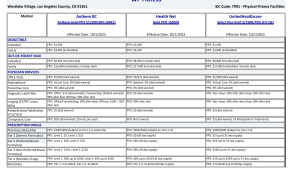





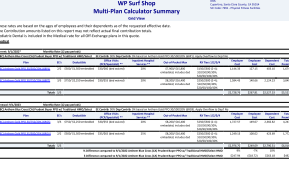


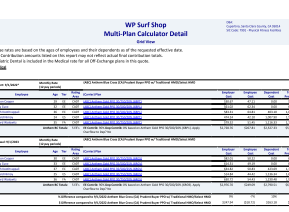


MEDICAL		Anthem  Anthem Blue Cross (CA) Prudent Buyer PPO w/ Select HMO/Priority Select HMO					
Monthly Rate (12 pay periods)	Employee Cost Breakdown	Dependent Cost Breakdown	Deductible	Office Visits (PCP/ Specialist) *	Inpatient Hospital Services *	Out-of-Pocket Max	RX Tiers 1/2/3/4
Anthem Bronze PPO 40/6200/40% (9KG2) \$45.83 PPO/Bronze/ Prudent Buyer PPO	Employee: 418.71 Ped. Dental: Embedded Employer Pays: (372.88) Enrollee Pays: 45.83	Ped. Dental: Embedded Employer Pays: (0.00) Enrollee Pays: 0.00	\$6,200/ \$12,400 embedded	\$40/\$80	40%	\$8,700/ \$17,400 embedded; includes ded	MedDed (2-4); \$20/80/120/30%; \$20/90/130/40%
Anthem Bronze PPO 4600/50% (9B1L) \$67.40 PPO/Bronze/ Prudent Buyer PPO	Employee: 440.28 Ped. Dental: Embedded Employer Pays: (372.88) Enrollee Pays: 67.40	Ped. Dental: Embedded Employer Pays: (0.00) Enrollee Pays: 0.00	\$4,600/ \$9,200 embedded	50%	50%	\$8,100/ \$16,200 embedded; includes ded	MedDed (2-4); \$20/80/120/30%; \$20/90/130/40%

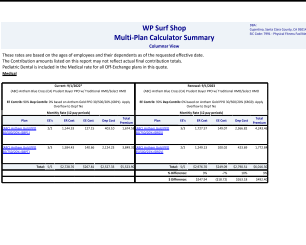


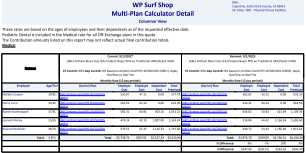


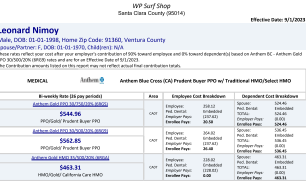


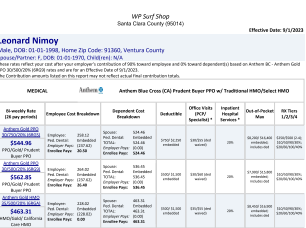


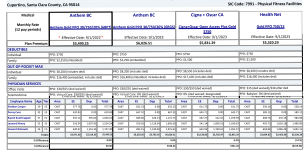


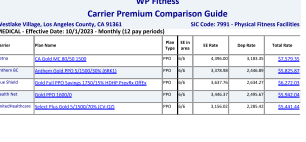





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PRO Quote Proposal Options

When you finish creating your proposal, you will be provided with additional options to use for your presentation. This guide will walk you through those options.

Snapshot	Report Name	Description	Standard (STND)	Multi-Plan Calculator (MPC)	Employee Enrollment Worksheet (EEW)	Build Your Own Comparison (BYOC)	Excel
	Cover Page	Cover Page of your proposal – can be customized to include your logo, a tagline and more.					
	Census	Lists all Employees and Dependents with their age, ZIP code and tier.					
	Ineligible Plan Report	Lists why some plans aren't available for the group as a whole or for certain employees on the census.					
	Benefit Summary	Side-by-side comparison of plan benefits.					
	Underwriting Guidelines	Summary of carrier guidelines for your group's plans.					

Snapshot	Report Name	Description	Standard (STND)	Multi-Plan Calculator (MPC)	Employee Enrollment Worksheet (EEW)	Build Your Own Comparison (BYOC)	Excel
	ACA Rate Table	Displays monthly rates for all ages, for all plans quoted (Medical plans only).					
	Grand Summary	At-a-glance comparison of rates and benefits.					
	Benefit and Rate Comparison	Compares plan benefits and rates for each employee; broken out by employee and dependent.					
	Rate Comparison	Compares rates for each employee.					
	Benefit Comparison	Compares plan benefits.					
	Multi-Plan Calculator Summary (Grid View)	Presents plan totals, broken out by employer cost, employee cost, and dependent cost. <i>Arranged by row.</i>					
	Multi-Plan Calculator Detail (Grid View)	Presents rates for each employee's plan election, broken out by employer cost, employee cost and dependent cost. <i>Arranged by row.</i>					

Snapshot	Report Name	Description	Standard (STND)	Multi-Plan Calculator (MPC)	Employee Enrollment Worksheet (EEW)	Build Your Own Comparison (BYOC)	Excel
	Multi-Plan Calculator Summary (Columnar View)	Presents plan totals, broken out by employer cost, employee cost and dependent cost. Arranged by column.					
	Multi-Plan Calculator Detail (Columnar View)	Presents rates for each employee's plan election, broken out by employer cost, employee cost and dependent cost. Arranged by column.					
	Enrollment Worksheet Without Benefits	Produces a worksheet for each employee with rates for self and each dependent. Available with Spanish translation.					
	Enrollment Worksheet With Benefits	Produces a worksheet for each employee with rates and key benefits for self and each dependent. Available with Spanish translation.					
	Rate and Benefit Comparison	When this is run as a Custom Comparison, it includes current vs. renewal.					
	Carrier Premium Comparison Guide	Compares total rates.					

Snapshot	Report Name	Description	Standard (STND)	Multi-Plan Calculator (MPC)	Employee Enrollment Worksheet (EEW)	Build Your Own Comparison (BYOC)	Excel
	Benefits & Rates (One Plan Per Page)	Produces one plan per page, with associated benefit summary, rates and employee information.	✔	✔	✔	✔	

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