



THE PLUS IS SMARTER COVERAGE



Quoting 101



HealthPlus ™
The Right Plan for a Healthier You™

Creating a Case



From the drop down menu select "Create a Case"

Welcome, Signature Training Messages(14) | Profile | Log Out

Advanced Search

Case Name



- Dashboard
- Activities
- Work Queue
- Tools

Expand All Collapse All

Dashboard Settings

Application Activity

Search:

Type Method ID Name

Showing 0 to 0 of 0 entries

First Previous Next Last

Message Center

Search:

	Case Type	Received	Case Name	ID	Subject
		07/05/2013	Jack Doogooder	49741	HealthPlus Signature I Status
		07/02/2013	Jack Doogooder	49741	HealthPlus Signature I Status
		06/30/2013	Jack Doogooder	49741	HealthPlus Signature I Status
		06/27/2013	Jack Doogooder	49741	HealthPlus Signature I

Showing 1 to 10 of 15 entries

First Previous 1 2 Next Last

Why “Create a Case?”

By creating a case you are able to build your lead sheet. Here you are going to enter the clients name, address, city, state, zip code, phone number, and email address. All of this information will carry over to the electronic application and be pre-populated for you.

[Cancel](#) [Continue >](#)

Case Information * Required

Demographics

* Case Name:

Address Line 1:

Address Line 2:

City:

* State: * ZIP Code: -

County:

Current Carrier:

Primary Contact Information

* First Name: * Last Name:

Relationship:

Same Address as Above?

Address Line 1:

Address Line 2:

City:

State: ZIP Code: -

Preferred Method of Contact:

Best Time to Contact:

Phone Number(s): Ext.:

Ext.:

Ext.:

Ext.:

Email:

Owner Assignment

Create Quote



Welcome, Signature Training [Messages\(14\)](#) | [Profile](#) | [Log Out](#)

[Advanced Search](#)

Case Name

- [Dashboard](#)
- [Activities](#)
- [Work Queue](#)
- [Tools](#)

Case -- Johnny Smith

Case Summary

[Case Notes & Messages](#)
[Case History](#)

Glossary

[Click here](#) for definitions of some of the terms you may read in the process of shopping for health insurance coverage.

Case Summary - Individual

Click here



Case Name: Johnny Smith
Case Status: Prospect

[Create Quote](#)

[Start Application](#)

Case Information -- Johnny Smith

Case Name: Johnny Smith
Case ID: 33842
Case Contact: Johnny Smith
Case Contact Address: 123 Street
Flint, MI 48532
(810) 555-1212 (Home)
none@none.com

Carrier:

Producer: Signature Training
(877)562-0907 (Work)
indsales@healthplus.org
Signature Training

Sales Rep:

[Edit Profile](#)

Policy Change Request(s)

<u>ID</u>	<u>Policy ID</u>	<u>Date Created</u>	<u>Created By</u>	<u>Status</u>	<u>Accepted Date</u>
No policy change requests currently exist.					

Application(s)

<u>ID</u>	<u>Date Created</u>	<u>Effective Date</u>	<u>Created By</u>	<u>Original Quote</u>	<u>Status</u>	<u>Accepted Date</u>
No applications currently exist.						

Create Quote

Click here for definitions of some of the terms you may read in the process of shopping for health insurance coverage.

Click on the plan that you would like to quote OR select see all available plans

- * Select the coverage that best suits your client's benefit needs.
- See All Available Plans
 - Signature One
 - Signature Savings
 - Signature Select
 - Signature Network

* Requested Effective Date: 09/01/2013

* ZIP Code: 48532

Who is going to be covered?

Enter all applicants date of birth

Person(s) Covered	Date of Birth	Gender	Smoker
* Primary Applicant	mm/dd/yyyy	<input type="checkbox"/>	<input type="checkbox"/>
Spouse	mm/dd/yyyy	<input type="checkbox"/>	<input type="checkbox"/>
Child	mm/dd/yyyy	<input type="checkbox"/>	<input type="checkbox"/>
Child	mm/dd/yyyy	<input type="checkbox"/>	<input type="checkbox"/>
Child	mm/dd/yyyy	<input type="checkbox"/>	<input type="checkbox"/>

Select gender

Select smoking status

+ Add Child

Click here to add child

Save Quote

Show Plans

* Required

Click here to show plans after all info has been entered

Create Quote

Glossary

Click here for definitions of some of the terms you may read in the process of shopping for health insurance coverage.

You can select up to 3 plans to quote at one time.

To change the deductible, prescription coverage, network or use alternate benefit options, click on "Change Plan Options"

Modify Quote

Compare Plans

Save Quote

Apply

Medical

Select	Plan Name	Coinsurance	Deductible	Office Visit	Monthly Rate
<input type="checkbox"/>	Signature Select	At In-Network Providers HealthPlus pays 80%, while you pay 20%	\$2,500 Single/\$5,000 Family	In-Network deductibles and Co-Insurance apply	\$84.00
<input type="checkbox"/>	Signature Select Value	At In-Network Providers HealthPlus pays 80%, while you pay 20%	\$7,500 Single/\$15,000 Family	Wellness and Preventive Services only	\$48.00
<input type="checkbox"/>	Signature Select	At In-Network Providers HealthPlus pays 70%, while you pay 30%	\$2,500 Single/\$5,000 Family	In-Network deductibles and Co-Insurance apply	\$72.00
<input type="checkbox"/>	Signature Select Value	At In-Network Providers HealthPlus pays 70%, while you pay 30%	\$7,500 Single/\$15,000 Family	Wellness and Preventive Services only	\$44.00

Click here to change benefit options

Please note the following with respect to the quoted rates displayed above:

- * Quoted rates are valid for 30 days and are only estimates.
- * Rates offered are our standard rates and only valid for the effective date requested.
- * Actual rates will be based upon information submitted on your signed application, your medical and/or prescription drug history, our underwriting guidelines and any optional benefit riders selected.
- * Dependent Children are eligible to remain on a parent's Signature plan individual insurance policy until reaching age 26. Subsequent coverage may be applied for directly by the former dependent child.
- * Do not cancel your existing medical insurance coverage until you receive written notification of coverage acceptance by HealthPlus Insurance Company.
- * Benefit payment may be subject to a pre-existing condition limitation.
- * Signature plans are underwritten by HealthPlus Insurance Company, a wholly-owned subsidiary of HealthPlus of Michigan.

Modify Quote

Compare Plans

Save Quote

Apply

Create Quote

Create Quote

- Quote Profile
- Available Plans**
- Available Plan(s) Comparison

Glossary

Click here for definitions of some of the terms you may read in the process of shopping for health insurance coverage.

Available Plan(s)

Listed below are the available HealthPlus Signature plans for your requested coverage. Your available benefit option values may vary based on your selections.

To change the deductible / prescription coverage, first click on "See Alternate Benefit Options", then click on "Change Plan Options"

Modify Quote Compare Plans **3** Save Quote Apply

Make sure you save quote !

Medical

Select	Plan Name	Coinsurance	Deductible	Office Visit	Monthly Rate
<input checked="" type="checkbox"/>	Signature Select				\$84.00
		Coinsurance Percentage: At In-Network Providers HealthPlus pays 80%, while you pay 20%			
		Annual Deductible In Network: \$2,500 Single/\$5,000 Family			
		Maximum Annual Out of Pocket Costs-In Network: \$7,500 Single/\$15,000 Family			
		Office Visit Copay: In-Network deductibles and Co-Insurance apply			
		Maternity Services: No Maternity Coverage			
		Prescription Copay: HPI Pharmacy Discount Card			
				1 Change Plan Options	Show Default

3

2

Use drop down arrow to make changes.

Click here to make all of the benefit boxes blank

1

Quoting Notes

- When you click on **change plan options** all six categories will have white empty boxes.

Coinsurance Percentage:	This will automatically default to either the 80/20 or 70/30 co-insurance option
Annual Deductible In Network:	Choose the deductible you want to quote
Maximum Annual Out of Pocket Costs-In Network:	This will default to your deductible choice
Office Visit Copay:	Choose ded/co-ins. or the office visit rider
Maternity Services:	Choose no maternity
Prescription Copay:	Choose what Rx option client would like

Generating a Proposal

- After the quote has been saved, click on **Generate Proposal**.

<u>Person(s) Covered</u>	<u>Date of Birth</u>	<u>Age</u>	<u>Gender</u>	<u>Tobacco Use</u>		
Primary Applicant	12/15/1987	25	Male	No		
Medical						
Select	<u>Plan Name</u>	<u>Coinsurance</u>	<u>Deductible</u>	<u>Office Visit</u>	<u>Monthly Rate</u>	
<input type="checkbox"/>	Signature Select	At In-Network Providers HealthPlus pays 70%, while you pay 30%	\$2,500 Single/ \$5,000 Family	In-Network deductibles and Co-Insurance apply	\$72.00	Delete
Proposed Insured Rate \$72.00		Spouse Rate --	Child Rate --	Total Rate \$72.00		

[Return to Case Summary](#) [Withdraw](#) [Modify Quote](#) [Generate Proposal](#) [Apply](#)

Generating a Proposal

Dashboard Activities Work Queue Tools

Case -- Johnny Smith

Case Summary

Quote Summary -- 52866

Copy Quote

Attachments (0)

Case Notes & Messages

Case History

Glossary

Click here for definitions of some of the terms you may read in the process of shopping for health insurance coverage.

Quote Summary -- Generate Proposal

Case Name: Johnny Smith

Quote Status: Quoting

To send the proposal, select the appropriate person below. To view the proposal before sending, click the **Preview** button.

Cancel

Preview

Send Proposal

Proposal Generation

Proposal Template Options

Proposal PDF HTML Plan Comparison

Check the sections you wish to include in the PDF output.

- Cover Sheet
- Cover Letter
- Benefit Quote
- Closing Letter

Click here to print the proposal.

Click here to email proposal

Recipients

Check the recipients you wish to receive the proposal. You may include multiple emails within the Email Other entry box. A semi colon must be entered to separate email addresses.

Email

You can email quote to client, yourself and one other person. The other person may be the parent of an adult child that is interested in what is being presented or a spouse.

- Email Case's Primary Contact
Johnny Smith (none@none.com)
- Email Self
Signature Training (indsales@healthplus.org)
- Email Other

Enter an additional message (optional)

You can type a message to your client and it will be emailed with the quote.

Questions?

CALL 877-562-0907

HealthPlus ™
The Right Plan for a Healthier You™