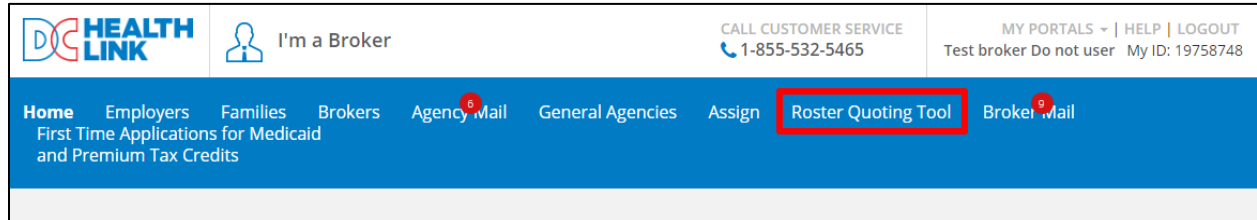


DC Health Link's Broker Quoting Tool

Who is this guide for? DC Health link brokers creating quotes for prospective clients.

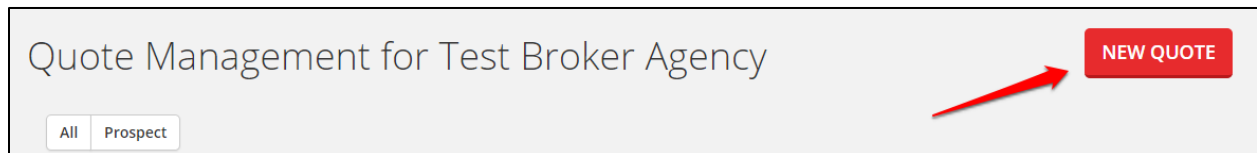
Create Quote – Login to your DC Health Link broker account

Click on “Quoting Tool” in the top right menu



Create Quote –

Click the “NEW QUOTE” button to generate a new quote.



Step 1: Quote Information

Quote Information

Quote Name:

Quote Effective Date:

Type:

Employer Name:

Fill in a Quote Name, Quote Effective date – which lists the allowable coverage start dates for a new DC Health Link group based on today’s date, Type, and then fill in the Employer Name.

NOTE: The only option for “Type” is Prospect, but in later versions we will populate existing small group clients so you can generate quotes for their annual and off-cycle renewals.

Step 2: Quote Benefit Group Selection


You can put in the Benefit Group Name for the group and add additional Benefit Groups if the group is interested in more than one Benefit Group. Once you have completed the Benefit Groups click the “SAVE” button.

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Quote Benefit Group Selection

Benefit Group #1:

Benefit Group #2:



NOTE: This information can flow into the Employer's account if the prospect client claims your quote, so your client may see this information.

Step 3: Quote Roster

Now you will fill out the roster so the quote you produce will accurately reflect the client's cost. You can click ADD EMPLOYEE to add employees and their families manually or upload a formatted roster. You can also select the "Duplicate" dropdown on the top right-hand corner to create multiple records for an employee and/or an employee plus their family. This allows you to create a quote more quickly on groups without specific employee level data.

Quote Roster

The roster you build below will be used to estimate employee and employer costs for each benefit group.

Family Id:


DOB: Name:

DOB: Name:

NOTE: you can "UPLOAD ROSTER" to use an existing roster and "DOWNLOAD ROSTER" to have a version of the roster you input for the quote.

Step 4:

After you finalize the roster entries you can "SAVE CHANGES" or "HOME" to navigate back to the Quoting Tool homepage, or you can click "CREATE QUOTE" to move forward with the quoting process.



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Step 5: Select the employer premium contribution percentages for employees and dependents.

The screenshot shows the 'Quote Calculator' interface. At the top, it says 'Quote Benefit Group Selection' with a dropdown menu set to '1. K St Store'. Below that, it says 'Health Features and cost criteria' with a dropdown arrow and 'Plans that meet your criteria: 151'. The main section is titled 'Step 1 - Define employer contribution percentages'. It contains four sliders with input boxes: '% for Employee' (set to 100), '% for Spouse' (set to 50), '% for Domestic Partner' (set to 50), and '% for Child' (set to 50). Each slider has a blue dot indicating the current value and a percentage label at the end of the track.

Step 6: Select what carriers from which you would like to compare reference plans, then select the Metal Level, Plan Types, and Networks you would like to see.

The screenshot shows the 'Step 2 - Filter your plans / Selection criteria' interface. It is a grid of checkboxes for various selection criteria:

Carriers	Metal Levels	Plan Types	DC Network	Nationwide
<input checked="" type="checkbox"/> any	<input type="checkbox"/> any	<input type="checkbox"/> any	<input type="checkbox"/> any	<input type="checkbox"/> any
<input type="checkbox"/> Aetna	<input type="checkbox"/> bronze	<input checked="" type="checkbox"/> hmo	<input type="checkbox"/> true	<input checked="" type="checkbox"/> true
<input type="checkbox"/> CareFirst	<input type="checkbox"/> silver	<input type="checkbox"/> pos	<input checked="" type="checkbox"/> false	<input type="checkbox"/> false
<input type="checkbox"/> Kaiser	<input checked="" type="checkbox"/> gold	<input type="checkbox"/> epo		
<input type="checkbox"/> UnitedHealthCare	<input checked="" type="checkbox"/> platinum	<input checked="" type="checkbox"/> ppo		

NOTE: These criteria will filter what plans you will compare to select the reference plan from for the employer's offerings.

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Step 7: Based on the criteria you selected in the previous step, you will see a set of plans available to you. Select up to 3 plans and click “COMPARE BENEFITS & COSTS/SELECT PLAN” to get a side-by-side plan and price comparison.

Step 3 - Select reference plans for comparison using Roster Cost to Employer

Showing 15 of 151 plans based on your selection criteria

Aetna Gold PPO SJ 1500 100/50 \$640

BluePreferred PPO Gold 1000 \$680

BluePreferred PPO Gold 1500 \$672

BluePreferred PPO Gold 500 \$698

BluePreferred PPO Gold 90%/70% \$646

HealthyBlue PPO Gold 1500 \$703

KP DC Gold 0/20/Dental/Ped Dental \$553

KP DC Gold 1000/30/Dental/Ped Dental \$504

KP DC Gold 1350/0%/HSA/Dental/Ped Dental \$491

KP DC Gold 1500/30/HSA/Dental/Ped Dental \$463

KP DC Gold 500/20/Dental/Ped Dental \$544

BluePreferred PPO Platinum 0 \$843

BluePreferred PPO Platinum 500 \$800

HealthyBlue PPO Platinum 1000 \$791

HealthyBlue PPO Platinum 500 \$823

COMPARE BENEFITS & COSTS / SELECT PLAN

Step 8: You will now see the Plan Comparison chart, click on “EXPORT TO PDF” to get the PDF version of the chart.

Plan Comparison Chart

- Plans can be rearranged by dragging the beginning of the company name
- Use ▲▼ to sort by copay

Plans	CareFirst		aetna		Kaiser Permanente	
	BluePreferred PPO Platinum 0		Aetna Gold PPO SJ 1500 100/50		KP DC Gold 0/20/Dental/Ped Dental	
Provider Network	Platinum • PPO		Gold • PPO		Gold • HMO	
	Nationwide		Nationwide		Nationwide	
	PROVIDER DIRECTORY		PROVIDER DIRECTORY		PROVIDER DIRECTORY	
	RX FORMULARY URL		RX FORMULARY URL		RX FORMULARY URL	
PLAN BENEFITS (In Network)	CO-PAY	COINSURANCE	CO-PAY	COINSURANCE	CO-PAY	COINSURANCE
Primary Care Visit to Treat an Injury or Illness	\$10.00	Not Applicable	\$20.00	Not Applicable	\$20.00	Not Applicable
Urgent Care Centers or Facilities	\$50.00	Not Applicable	\$75.00 Copay after deductible	Not Applicable	\$50.00	Not Applicable
Specialist Visit	\$20.00	Not Applicable	\$50.00 Copay after deductible	Not Applicable	\$50.00	Not Applicable
Emergency Room Services	\$100.00	Not Applicable	\$300.00 Copay after deductible	No Charge after deductible	\$250.00	Not Applicable
Inpatient Hospital Services (e.g., Hospital Stay)	\$200 Copay per Stay	Not Applicable	\$750.00 Copay per Stay after deductible	No Charge after deductible	\$300.00 Copay per Day	Not Applicable
Laboratory Outpatient and Professional Services	\$10.00	Not Applicable	\$50.00 Copay after deductible	No Charge after deductible	\$50.00	Not Applicable
X-rays and Diagnostic Imaging	\$20.00	Not Applicable	\$50.00 Copay after deductible	No Charge after deductible	\$50.00	Not Applicable
Generic Drugs	\$10.00	Not Applicable	\$5.00	Not Applicable	\$20.00	Not Applicable
Preferred Brand Drugs	\$45.00	Not Applicable	\$50.00 Copay after deductible	No Charge after deductible	\$75.00 Copay after deductible	Not Applicable
Non-Preferred Brand Drugs	\$65.00	Not Applicable	\$100.00 Copay after deductible	No Charge after deductible	\$100.00 Copay after deductible	Not Applicable
Specialty Drugs	Not Applicable	50.00%	\$300.00 Copay after deductible	No Charge after deductible	Not Applicable	50.00% Coinsurance after deductible
	Summary of Benefits and Coverage		Summary of Benefits and Coverage		Summary of Benefits and Coverage	

Export to PDF

DC Health Link's Broker Quoting Tool

Step 9: Select a reference plan based on the cost comparison table.

Offering Option:	By Single Plan	By Single Carrier	By Metal Level
Plan	Reference	Reference	Reference
KP DC Gold 0/20/Dental/Ped Dental	\$3866	\$3866	\$3866
Aetna Gold PPO SJ 1500 100/50	\$4475	\$4475	\$4475
BluePreferred PPO Platinum 0	\$5900	\$5900	\$5900

NOTE: It is important to select the reference plan under the choice model you are proposing to your client, see columns "By Single Plan", "By Single Carrier", "By Metal Level."

After you select a reference plan, you can then see the Employee Cost Breakdown:

Detailed Employee cost breakdown for selected health plans:

			KP DC Gold 0/20/Dental/Ped Dental Employee: \$182, Employer: \$631	Aetna Gold PPO SJ 1500 100/50 Employee: \$210, Employer: \$731	BluePreferred Employee: \$277
Name	Relationship Contribution	Age	Employee Cost	Employee Cost	Employee Cost
Karema	Employee (100%)	44	0.0	0.0	0.0
Trent	Spouse (50%)	37	181.17	209.72	276.49

Step 10: If you would like to produce a dental quote for the group, follow the same steps from the health quote.

Dental Features and cost criteria ▶ Plans that meet your criteria: 13 Optional

Step 1 - Define employer contribution percentages

% for Employee: 0% % for Spouse: 0%

% for Domestic Partner: 0% % for Child: 0%

Step 2 - Filter your plans / Selection criteria

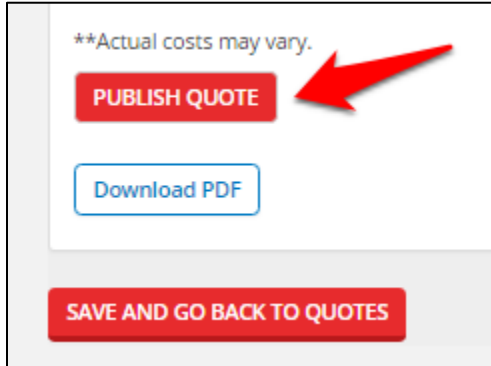
Carriers	Coverage Level	Plan Types	DC Network	Nationwide
<input checked="" type="checkbox"/> any	<input checked="" type="checkbox"/> any	<input checked="" type="checkbox"/> any	<input checked="" type="checkbox"/> any	<input checked="" type="checkbox"/> any
<input type="checkbox"/> CareFirst	<input type="checkbox"/> high	<input type="checkbox"/> ppo	<input type="checkbox"/> true	<input type="checkbox"/> true
<input type="checkbox"/> Dominion	<input type="checkbox"/> low	<input type="checkbox"/> hmo	<input type="checkbox"/> false	<input type="checkbox"/> false
<input type="checkbox"/> Delta Dental				
<input type="checkbox"/> MetLife				

Step 3 - Select reference plans for comparison using Roster Cost to Employer

Showing 11 of 11 plans based on your selection criteria

DC Health Link's Broker Quoting Tool

Step 11: Once you finalize the quote for health, dental, and multiple benefit groups (if applicable), you can click "PUBLISH QUOTE"



NOTE: You can download the quote by clicking "Download PDF" and you can also save the quote and return to your Quoting Tool dashboard by clicking "SAVE AND GO BACK TO QUOTES."

Step 12: Once you publish the quote you will receive a confirmation page with a Claim Code. Send the claim code to your client. Have them create an employer account on DCHealthLink.com, and click "Claim Quote" under their "Benefits" tab.

