



OneSource: How to complete an existing business quote

1. Login to the OneSource Dashboard. Enter the customer ID in the search bar. Click "Search."

The screenshot shows the OneSource dashboard interface. At the top, there is a search bar with a red box around it and a 'SEARCH' button. Below the search bar is a navigation menu with items: ACCOUNTS, QUOTES, GROUP SEGMENT, REPORTS, SUPPORT REQUESTS, DENTAL ATTESTATIONS, AGENT PORTAL, SBCS, and MORE. The main header reads 'WELCOME TO BLUE CROSS BLUE SHIELD OF MICHIGAN MANAGING AGENT COMMUNITY!'. On the left, there is a 'Dashboard MY DASHBOARD' section with a 'Refresh' button and a timestamp 'As of May 19, 2021, 9:34 AM Viewing as Julie O'neill'. Below this are two reports: 'Accounts Report' showing a donut chart with 'Record Count' of 9.5k and 'Account Status' of Active; and 'Agent Support Requests Report' showing a donut chart with 'Record Count' of 152 and 'Status' of In Progress. On the right, there is an 'ACTIONS:' section with buttons for 'Launch New Business Quote' and 'Launch New Support Request'. A central pop-up window titled 'What do you want to do today?' offers options: 'Quote New Business', 'Enroll an Account', 'Quote Existing Business', 'Group Wide Change', and 'Group Maintenance'. A 'Pll use Instant Guidance later.' button is also present. A vertical 'Instant Guidance' button is on the far right.

2. Select the type of quoting needed.

The screenshot shows the 'How can we help you?' help menu. It features a search bar and a list of options. The option 'Help Me Quote Existing Business' is highlighted with a red box. Other options include 'Agent Resources', 'New Business', 'Existing Business', 'Help me with a SWC', 'Help me with a Maintenance Change', 'Find My Renewal Package', 'Open the Underwriting Rules', and 'Online Submission Checklist'. The interface is powered by usak.



3. Click “Alternate Quote.”

Account

Account Record Type: Account - Customer

Account Phone: (313) 486-1100

Mailing Address: 20000 WOODBINE ST, SAGINAW MI 48604, United States

Retention Sales Representative: [Name]

Servicing Agent: [Name]

ACTIONS

Create New Support Request **Alternate Quote** Maintenance Changes

DETAILS QUOTES ENROLLMENTS PACKAGE SUMMARY GROUP WIDE CHANGE

Account Information

Account Name: [Name]

Account Phone: (313) 486-1100

Account Type: [Type]

Servicing Agent: [Name]

Retention Sales Representative: [Name]

Assigned Managing Agency: ACTION BENEFITS COMPANY

CID: 287815

4. Verify fields have been entered correctly. Click “Next.”

Launch Alternate Quote

Requested Effective Date: Apr 1 2021

Renewal Month*: April 1st

Street*: [Address]

City*: SAGINAW

State*: MI

ZIP Code*: 48604

County*: SAGINAW

Cancel

Next Click Next



5. If new employees need to be added or their status needs to be changed, click “Add Employee.” Review all membership and click “Next.”

Last Name	First Name	Gender	Birth Date	Age	Relationship	Group Segment	Member Type	Status	Delete
lastname	STUART		3/20/1971	50	Employee		Regular	Enrolling	Add Dependent
lastname	MICHAEL		11/28/1958	62	Employee		Regular	Enrolling	Add Dependent

cancel Next Save for later

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6. Select all relevant plans and complete all required fields. Click “Next.”

Select the relevant plans below and complete all required fields. When done, click Next at the bottom of the page.

Medical

Dental

Vision

Include Elective Abortion Rider?
 Yes No

Please select your Dental Plan Contribution Type*
 Non-Voluntary

Add Ortho?*

Please select your Vision Plan Contribution Type*
 Non-Voluntary

cancel Next Save for later



7. To see alternate plan options, click "Next."

Current Plan(s) New Plan(s) NEXT

If more than 3 plans are selected, use this button to scroll between them BACK NEXT

Simply Blue™ PPO Silver \$4000

\$1,148/mo

Deductible	\$4,000
Coinsurance	30%
Office Visit Copay	\$40
ER Copay	\$250
Rx Coverage	\$30/\$60/50%/20%/25%

Compare

Hide Selected Plans

8. Use filters to narrow the results. Select plans to compare.

Use filters to narrow your results
Make sure to click Apply Filters

BACK NEXT

Apply Filters

Clear All Filters

Network Type

- PPO
- HMO

Metal Level

- Silver
- Gold
- Platinum
- Bronze

CDH Plans

- HRA
- HSA

Wellness Plans

Available Plans

Compare

Instant Guidance

Plan Name	Price	Deductible	Coinsurance	Office Visit Copay	ER Copay	Rx Coverage
BCN Healthy Blue Living™ HMO Gold \$1000	\$1,161/mo	\$1,000	20%	\$25	\$150	\$10/\$30/\$60/\$80/20%/20%
BCN Healthy Blue Living™ HMO Gold \$1500	\$1,141/mo	\$1,500	20%	\$25	\$150	\$6/\$25/\$50/\$80/20%/20%
BCN Healthy Blue Living™ HMO Gold \$2000	\$1,136/mo	\$2,000	20%	\$25	\$150	\$4/\$15/\$40/\$80/20%/20%

Select Plan

01:26



9. Group information is listed in the quote details. To compare products, click “Next.”

Quote Details

Account Name: STUART, PPO
 Agent Name: TGG
 Managing Agent: [Name]

Compare Products
 Here you will see your current plans on the left and the newly quoted plans on the right.

BACK **NEXT**

MEDICAL			MEDICAL		
Product Name	Est. Prem	Members	Product Name	Est. Prem	Members
Simply Blue™ PPO Silver \$4000	\$1,112.96	2	Simply Blue™ PPO Silver \$4000	\$1,148.21	2
Total	\$1,112.96	2	Total	\$1,148.21	2

10. To compare the monthly premiums between the selected plans, click “Next.” The census rates will appear. Click “Next.”

TOTAL MONTHLY PREMIUMS											
	Current	Alternate Quote	% Change								
Medical	\$1,112.96	\$1,148.21	3%								
Dental	\$0.00	\$53.85	N/A								
Vision			N/A								
Total Monthly Premium			0%								

Census with Rates
 Here you will see each member's rate based on the plan they have selected.

BACK **NEXT**

Group Segment: [Icons]

First Name	Last Name	Date of Birth	Age	Relationship	Member Type	Medical	Rate	Dental	Rate	Vision	Rate
STUART	lastname	3/20/1971	50	Employee	Regular	Simply Blue™ PPO Silver \$4000	\$440.16	Blue Dental™ PPO SG 80/50/50 (50/50/50)	\$23.92	Blue Vision™ 24/24/24	\$4.46
MICHAEL	lastname	11/28/1958	62	Employee	Regular	Simply Blue™ PPO Silver \$4000	\$708.05	Blue Dental™ PPO SG 80/50/50 (50/50/50)	\$29.93	Blue Vision™ 24/24/24	\$4.53

*We reserve the right to adjust rates if any of the assumptions or calculations used in the quoting process are incorrect. Final rates will be determined based on actual group enrollment and participation.
 *Plans and rates are not final until they have been approved by DIFS and CMS
 *Your agent is providing a Summary of Benefits and Coverage with this quote.
 *To comply with the Patient Protection and Affordable Care Act, groups may be required to make changes to their health insurance coverage. This may result in adjustments to the rates.



11. Click “Lock quote and proceed.” There is an option to print a quick quote reference.

Name	First Name	Last Name	DOB	Age	Employee	Type	Plan	Rate	Benefit	Cost	
STUART	lastname	3/20/1971	50	Employee	Regular	Simply Blue™ PPO Silver \$4000	\$440.16	Blue Dental™ PPO SG 80/50/50 (50/50/50)	\$23.92	Blue Vision™ 24/24/24	\$4.46
MICHAEL	lastname	11/28/1958	62	Employee	Regular	Simply Blue™ PPO Silver \$4000	\$708.05	Blue Dental™ PPO SG 80/50/50 (50/50/50)	\$29.93	Blue Vision™ 24/24/24	\$4.53

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Print Page

Lock Quote and Proceed

If you are ready to lock your rates and generate a proposal, click here. If not, Click Save for Later.

By WalkMe

Lock Quote and Proceed

Previous

Save for later

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12. Select the available documents you would like. Enter your email address. Click on “Get Quote.”

Available Documents

- Cover Page
- Census with Rates
- Rate Grid
- Benefit Summaries
- Summary of Benefits and Coverage

Please enter email address(es)

Download **Send Email**

Go to Quote

Click Go to Quote to continue

For document generation, please adjust your pop-up blocker. For pop-up blocker instructions, click [here](#).

By WalkMe

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