



Quoting new business in OneSource

1. Login to your OneSource (OS) dashboard.

WELCOME TO BLUE CROSS BLUE SHIELD OF MICHIGAN MANAGING AGENT COMMUNITY!

Dashboard MY DASHBOARD
As of May 19, 2021, 9:34 AM Viewing as Julie O'Neill

ACCOUNTS REPORT: Record Count 9.5k

AGENT SUPPORT REQUESTS REPORT: Record Count 152

ACTIONS:
Launch New Business Quote
Launch New Support Request

What do you want to do today?
Quote New Business
Enroll an Account
Quote Existing Business
Group Wide Change
Group Maintenance
I'll use Instant Guidance later

2. Click on "Launch New Business Quote."

Dashboard MY DASHBOARD
As of Feb 24, 2021, 8:44 PM Viewing as Manual agent m1

ACCOUNTS REPORT: Record Count 46K

AGENT SUPPORT REQUESTS REPORT: We can't draw this chart because there is no data.

ACTIONS:
Launch New Business Quote
Upload Logo
Launch New Support Request
Take Me Back to Agent Portal



3. Complete all required fields.

Account Profile

Complete the required fields below
Click Next when done.
By WalkMe

Account Profile

Account Name *

Headquarters ZIP Code * Headquarters County

Managing Agent * Requested Effective Date *

4. Click "Next" when done.

Account Profile

Complete the required fields below
Click Next when done.
By WalkMe

Account Profile

Account Name *
GSD Group 24

Headquarters ZIP Code * Headquarters County
48348 OAKLAND

Managing Agent * Requested Effective Date *
Action Benefits Apr 1 2021

Requested Renewal Month * Total FTE *
April 1st 3

Expected Active Enrolling *
3



5. Upload your spreadsheet census. Browse your computer for the prepared census. Double click on the file to load. Click “Next”

The screenshot shows the 'Prepare Your Census' section of a web application. At the top, there is a navigation bar with links for HOME, MY ACCOUNTS, MY QUOTES, SUPPORT REQUEST, RENEWAL CONTRACTS, and REPORTS. Below this is a progress indicator with a blue dot under 'Census'. The main area contains four buttons: 'Download Census Template', 'Upload Census' (highlighted with a red box), 'Add Employee', and 'Delete Census'. A tooltip above the 'Upload Census' button reads: 'Click Upload Census or Add Employee. Prepare your census by uploading a completed census or adding employees to the online form. By WalkMe'. Below the buttons is a file explorer window. The left sidebar shows folders like Desktop, Downloads, Documents, Pictures, Google Drive, job aid, Quotes and Prop, Sample videos, Vlocity, OneDrive, This PC, 3D Objects, Desktop, and Documents. The main pane shows 'No items match your search.' The bottom of the file explorer has a 'File name:' field, a 'Custom Files' dropdown, and 'Open' and 'Cancel' buttons. A hand cursor is over the 'Open' button. Below the file explorer, a 'Next' button is highlighted with a red box. A tooltip above it reads: 'Click Next. By WalkMe'. The background shows a partial view of the user profile 'MANUAL.A...' and a 'Save for later' link.



6. Verify all information is correct, click “next.”

Prepare Your Census

Download Census Template Upload Census Add Employee Delete Census

	Last Name	First Name	Gender	Birth Date*	Age	Relationship*	Member Type*	Status*	Delete
1	<input type="text"/>	Ron	Male	11/11/1985	35	Employee	Regular	Enrolling	Add Dependent Delete
	<input type="text"/>	Alison	Female	12/19/1989	31	Spouse	Regular	Enrolling	Delete
	<input type="text"/>	Dustin	Male	3/11/2018	3	Child	Regular	Enrolling	Delete
2	<input type="text"/>	Jane	Female	11/11/1975	45	Employee	Regular	Enrolling	Add Dependent Delete
	<input type="text"/>	Christine	Female	11/11/2016	4	Child	Regular	Enrolling	Delete
3	<input type="text"/>	Melissa	Female	11/11/1988	32	Employee	Regular	Enrolling	Add Dependent Delete

Cancel

Next

Click Next
By WalkMe

Save for later

7. Begin selecting medical, dental and vision products.

SEARCH

MANUAL A...

HOME MY ACCOUNTS MY QUOTES SUPPORT REQUEST RENEWAL CONTRACTS REPORTS

✓
✓
●
○
○

Products

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

By WalkMe

Select Your Products

Medical

Dental

Vision



8. Answer applicable questions. Click “Next.” Note, if quoting dental and vision, you must select the contribution type. Below 35 percent contribution is voluntary. If the contribution is more than 35 percent, it is non-voluntary.

Medical Dental Vision

Include Elective Abortion Rider?
 Yes No

Please select your Dental Plan Contribution Type* ▼

Add Ortho?*
Yes ▼

Please select your Vision Plan Contribution Type* ▼

Cancel Save for Later ?

Next

9. Narrow the results by using filters. Select plans and click “Next” at the bottom of the page.

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

- Platinum
- Bronze
- Gold
- Silver

CDH Plans

- HIRA
- HISA

Available Plans Compare ?

Plan Name	Monthly Premium	Deductible	Coinsurance	Office Visit Copay	ER Copay	Rx Coverage
BCN Healthy Blue Living™ HMO Gold \$1000	\$1,533/mo	\$1,000	20%	\$30	\$150	\$10/\$30/\$60/\$80/20%/20%
BCN Healthy Blue Living™ HMO Gold \$1500	\$1,508/mo	\$1,500	20%	\$30	\$150	\$6/\$25/\$50/\$80/20%/20%
BCN Healthy Blue Living™ HMO Gold \$2000	\$1,486/mo	\$2,000	20%	\$30	\$150	\$10/\$30/\$60/\$80/20%/20%

2:23 / 4:46



10. On the Member Level Designation page, select “No” to see the member rates on each plan quoted. Click “Next.”

Member Level Designation

If you know which plan each member would enroll in, click yes. If not, click No to see rates for all the selected plans.

Choose Save for Later to designate plans at another time.

By WalkMe

Would you like to enter Employee Plan Elections?

Yes No

Cancel Save for later ?

Next

Previous

11. Quote details will appear. Click “Next.”

Quote Details

Below you will see the information you entered in the Group Profile page.

NEXT

Quote Details

Account Name:	GSD Group 24	Requested Effective Date:	Apr 1 2021	FTE:	3
Agent Name:	Manual agent m1	Requested Renewal Month:	April	Expected Active Enrolling:	3
Managing Agent:	Action Benefits	Rating Area:	B	Expected Waiving:	0

Quoted Products

Estimated Total Monthly Premium: \$2,804.04

MEDICAL		DENTAL		VISION	
Product Name	Est. Prem	Product Name	Est. Prem	Product Name	Est. Prem
Community Blue™ PPO Platinum \$500	\$2,663.99	Blue Dental™ PPO SG 80/50/50/50 (50/50/50/50)	\$126.50	Blue Vision™ 24/24/24	\$13.55



12. Quoted products will appear. Click “Next.”

Quote Summary

Quote Details

Account Name: GSD Group 24
Agent Name: Manual agent m1
Managing Agent: Action Benefits

Requested Effective Date: Apr 1 2021
Requested Renewal Month: April
Rating Area: B

FTE: 3
Expected Active Enrolling: 3
Expected Waiving: 0

Quoted Products

Estimated Total Monthly Premium: \$2,804.04

MEDICAL		DENTAL		VISION	
Product Name	Est. Prem	Product Name	Est. Prem	Product Name	Est. Prem
Community Blue™ PPO Platinum \$500	\$2,663.99	Blue Dental™ PPO SG 80/50/50/50 (50/50/50/50)	\$126.50	Blue Vision™ 24/24/24	\$13.55

13. A box, “Census with Rates” will appear. Click “Next.”

Quote Summary

Quote Details

Account Name: GSD Group 24
Agent Name: Manual agent m1
Managing Agent: Action Benefits

Requested Effective Date: Apr 1 2021
Requested Renewal Month: April
Rating Area: B

FTE: 3
Expected Active Enrolling: 3
Expected Waiving: 0

Quoted Products

Estimated Total Monthly Premium: \$2,804.04

MEDICAL		DENTAL		VISION	
Product Name	Est. Prem	Product Name	Est. Prem	Product Name	Est. Prem
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 Managing Agent: Action Benefits

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 Requested Renewal Month: April
 Rating Area: B

FTE: 3
 Expected Active Enrolling: 3
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Quoted Products

Estimated Total Monthly Premium: \$2,804.04

MEDICAL		DENTAL		VISION	
Product Name	Est. Prem	Product Name	Est. Prem	Product Name	Est. Prem
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 Agent Name: Manual agent m1
 Managing Agent: Action Benefits

Requested Effective Date: Apr 1 2021
 Requested Renewal Month: April
 Rating Area: B

FTE: 3
 Expected Active Enrolling: 3
 Expected Waiving: 0

Quoted Products

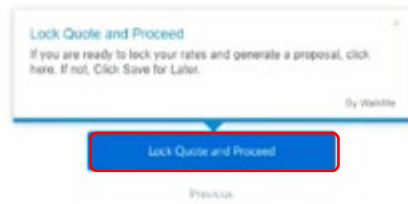
Estimated Total Monthly Premium: \$2,804.04

MEDICAL		DENTAL		VISION	
Product Name	Est. Prem	Product Name	Est. Prem	Product Name	Est. Prem
Community Blue™ PPO Platinum \$500	\$2,663.99	Blue Dental™ PPO SG 80/50/50/50 (50/50/50/50)	\$126.50	Blue Vision™ 24/24/24	\$13.55

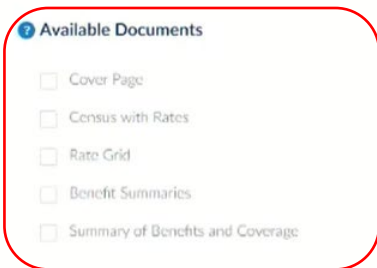


14. You will have the option to print this page. Click “Lock Quote and Proceed.”

*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 DFS 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 an adjustment to the rates.

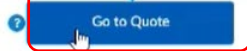


15. Select the documents to be included with the quote. Click “Next.” Click “Go to Quote”



Please enter email address(es)

? +



16. The quote is complete.

