



E b i x / H e a l t h C o n n e c t O n l i n e R e n e w a l s

Ebix/HealthConnect Online Renewals

Ebix/HealthConnect Online Renewals is an online solution for the group renewal process. The Renewal module can be integrated with Ebix/HealthConnect's Quoting and Enrollment applications or deployed on a stand-alone basis. Ebix/HealthConnect Renewal takes the traditional time-consuming, paper-based renewal process and turns it into a fast and flexible process for carriers, brokers and employer groups. Through intuitive workflow, Ebix/HealthConnect Online Renewal enables a broker to conduct the group renewal process on the carrier's website. The Renewal tool has been designed so that with just a few simple steps the broker can review rates and benefits for groups in their renewal cycle. The broker can confirm the employer's acceptance of their renewal without changes, or review alternative plans and submit a request for these changes to be implemented by the carrier. This eliminates many inefficiencies for the carrier, broker and group administrator, and allows the carrier to process group renewals electronically.

Ebix/HealthConnect Online Renewal is made up of five main components:

- Search groups that are ready for renewal
- Review a renewal
- Run/compare alternate plan options
- Create/send proposals
- Renew the group

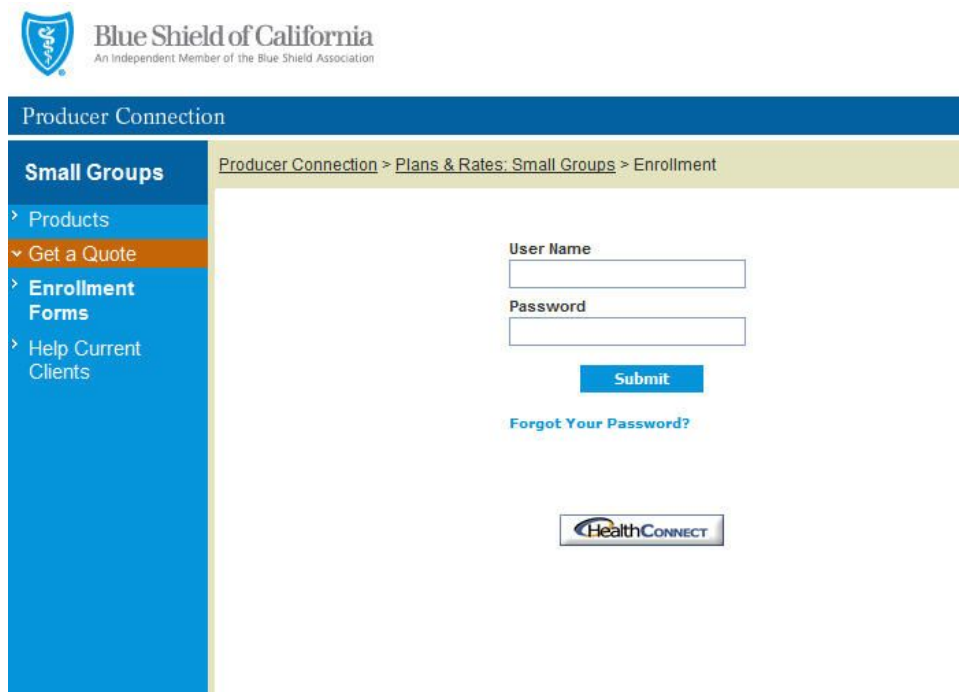


Carrier Branding

The entire renewal process is conducted on the carrier's website. The renewal process is conducted in a controlled access environment where the broker can compare the renewal plan to other plans offered by the carrier, but is prevented from easy spreadsheet comparisons versus competing carrier plans. All navigation is kept intact, allowing the user to reach easily other areas on the carrier's site.

Broker Registration

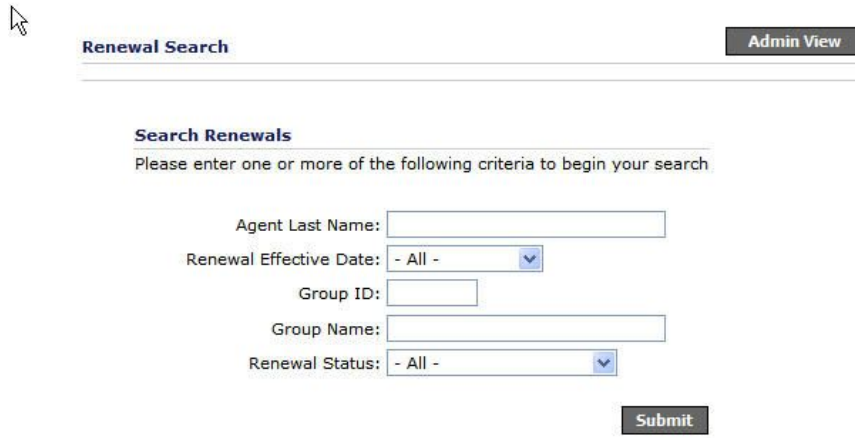
The broker logs into the Broker area of the carrier's website with their existing username and password, or registers to obtain access if they are a first time visitor



The screenshot displays the Blue Shield of California website interface. At the top left is the Blue Shield of California logo, with the text "Blue Shield of California" and "An Independent Member of the Blue Shield Association" below it. A blue navigation bar contains the text "Producer Connection". Below this is a breadcrumb trail: "Producer Connection > Plans & Rates: Small Groups > Enrollment". A left-hand navigation menu lists "Small Groups" (selected), "Products", "Get a Quote", "Enrollment Forms", and "Help Current Clients". The main content area features a login form with fields for "User Name" and "Password", a "Submit" button, and a "Forgot Your Password?" link. At the bottom of the form is the HealthCONNECT logo.

Search Group Renewals

The broker enters the renewal effective date and all groups within his book of business with that renewal date are retrieved. The broker could also search for a specific group by Group Name or Group ID.



The screenshot shows a web interface for searching group renewals. At the top left, there is a mouse cursor. The page has a header with "Renewal Search" on the left and "Admin View" on the right. Below the header, the section is titled "Search Renewals" and includes the instruction: "Please enter one or more of the following criteria to begin your search". The search criteria are: "Agent Last Name:" followed by a text input field; "Renewal Effective Date:" followed by a dropdown menu currently showing "- All -"; "Group ID:" followed by a text input field; "Group Name:" followed by a text input field; and "Renewal Status:" followed by a dropdown menu currently showing "- All -". A "Submit" button is located at the bottom right of the search area.

Group Listing

After accessing his renewing groups, the broker selects a particular group.

Group Listing

The following groups meet your search criteria. Click on 'Group ID' for more information. To modify your search, click the 'Back' button.

ID	Name	Status	Effective Date	Days Left to Renew
385	Kayak Hut	Not Yet Renewed	03-01-2006	6
388	Carlin Systems	Renewed Current Plan	03-01-2006	6
384	Silverline	Renewed with New Plan	03-01-2006	6
452	Acocella Law Office	Not Yet Renewed	04-01-2006	37
454	ABC Company	Not Yet Renewed	04-01-2006	37
417	West End Catering	Renewed Current Plan	04-01-2006	37
394	Coach Tours	Renewed with New Plan	04-01-2006	37
450	Level 3	Renewed Current Plan	04-01-2006	37
389	Tyson Motors	Not Yet Renewed	04-01-2006	37
419	123 Corp	Not Yet Renewed	05-01-2006	68

Back

Group Information

After selecting a group, the broker can see summary information about the group and perform three functions: (i) run new plan options; (ii) send proposals to client; and (iii) renew the group.

Group Information
Run new plan options, send a proposal to the employer, or renew the group directly from this screen.

Kayak Hut
472 Plumeria Drive
San Mateo, DE 19702
Phone: 650-647-5100
Fax: 650-647-5110
Contact: Joyce Davis

Renewal Date: 04/01/2006
Status: Not Yet Renewed
Days to Renew: 37

[Run Options](#) [Send Proposal](#)

Quotes

Plan Option	Change	View Details	Renew Group
Current Plan	+ 13%	View Details	Renew Group
Plan Option 1	+ 8%	View Details	Renew Group
Plan Option 2	- 4%	View Details	Renew Group

Current Census

Name	Address	City, State, Zip	DOB	Status
Oscar, John	734 Foster Ave	Palo Alto, DE 19702	01-18-1971	EE
Jones, Bob	32 Elm St	San Mateo, DE 19702	03-28-1970	EE/Fam
Pedota, Paul	255 Spring Street	Lawrence, DE 19702	05-03-1962	EE
Howe, Mary	76 Forest St	San Jose, DE 19702	01-09-1976	EE/Sp
Jensen, Jane	123 J Street	Pleasantville, DE 19702	02-02-1970	EE/Ch
Manson, Mike	32 Gramercy Drive	Mountainville, DE 19702	01-14-1957	EE/Fam
Waters, Ken	678 Union Ave	San Mateo, DE 19702	08-11-1943	EE

Select Plan Options

The broker can select different plans, optional riders, and other variables and compare those quotes to the current and renewal plan. The broker can save one or more of those quotes he is working on and send it to the "view/send proposals" section.

Select Plan Options
Select plan options and compare to the current plan. Clicking 'Save' will add the plan to the list of saved quotes.

Kayak Hut
472 Plumeria Drive
San Mateo, DE 19702
Phone: 650-647-5100
Fax: 650-647-5110
Contact: Joyce Davis

Current Plan - Standard POS 10		Alternative Plan	
	In-Net	Out-Net	
Plan Type	POS		POS
Deductible	\$0	\$500	\$0
Co-Insurance	100%	70%	100%
Co-Ins Limit	\$0	\$10,000	\$0
Copay	\$10	\$0	\$5
Rx Card	10/20/50C		5/10/50C
Riders			
Dental	Plan A		Plan A
Vision	Vision 100		Vision 100

View Details

The broker can compare the different quotes and select which ones to present to the client for review.

Plan Details

The following are the major parameters for the selected plan

Standard POS 10

Plan Type	In-Net	Out-Net
	POS	
Deductible	\$0	\$500
Co-Insurance	100%	70%
Co-Ins Limit	\$0	\$10,000
Copay	\$10	\$0
Rx Card	10/20/50C	

Riders

Dental	Plan A
Vision	Vision 100
Mental Health	10 Visits In-Net

Rates

	New
Single - 4	\$256.39
EE/SP - 1	\$489.31
EE/Child(ren) - 1	\$457.77
Family - 2	\$872.09
Total	\$10,372.09

Back

Send Proposal

The final proposal can be printed locally by the broker or e-mailed to the client directly.

Send Proposal to Kayak Hut (Group ID: 385)

Select the desired proposal options

1. Select Quotes to Propose

- Current Plan
- Plan Option 1
- Plan Option 2

2. Select Proposal Options

- Cover Letter
- Coverage Summaries
- Group Profile

3. Select Delivery Method

- Print for Manual Delivery
- Email Delivery

Email Address:
for multiple recipients, separate addresses with a comma

Submit

Renew Group

After reviewing the available renewal options with the client, the broker can then renew the group. The renewal can be done "as is" or "with changes", and the broker is asked to confirm they have selected the correct renewal plan.

Complete Renewal

Please verify that all of the following information is correct. If you need to make any changes, click the 'Back' button and edit the appropriate information. If all information is correct, click 'Submit' to continue.

Kayak Hut

472 Plumeria Drive
San Mateo, DE 19702
Phone: 650-647-5100
Fax: 650-647-5110
Contact: Joyce Davis

Standard POS 10

Plan Type	In-Net	Out-Net
POS		
Deductible	\$0	\$500
Co-Insurance	100%	70%
Co-Ins Limit	\$0	\$10,000
Copay	\$10	\$0
Rx Card	10/20/50C	

Riders

Dental	Plan A
Vision	Vision 100
Mental Health	10 Visits In-Net

Rates

	New
Single - 4	\$256.39
EE/SP - 1	\$489.31
EE/Child(ren) - 1	\$457.77
Family - 2	\$872.09
Total	\$10,372.09

Renewal Authorization

If the carrier wishes to allow the broker to authorize the renewal on behalf of the group, the broker could do so and a letter outlining the final renewal would be sent to the group for confirmation. If the carrier does not wish to allow the broker to renew the case on behalf of the group, or the broker does not wish to renew the group, the renewal information is sent to the client to authorize and then sent back to the carrier.

Renewal Authorization

By clicking 'Submit' below, you are verifying that:

- the agent listed below is authorized to sign on behalf of **Kayak Hut** as the broker of record
- Kayak Hut** will be legally bound by the terms and conditions of this agreement

Group Name:	Kayak Hut
Group ID:	385

Agency Name:	Benefit Solutions, Inc.
Agent Last Name:	Joe
Agent Last Name:	Broker
Agent ID:	IG-63476

Additional changes can be made to this renewal, if it is within the renewal period, by contacting Group Services at 1-800-334-9130.

Back

Submit

Renewal Confirmation

Once the renewal is selected (either "as is" or "with changes") the broker is asked to confirm the renewal.

Renewal Confirmation

Your renewal has been submitted.

Thank you, your renewal for **Kayak Hut** has been submitted. A letter will be mailed to the benefits contact and to the broker of record outlining the changes.

Additional changes can be made to this renewal, if it is within the renewal period, by contacting Group Services at 1-800-334-9130.

[Back to Group Listing](#)



EBIX HEALTH

www.ebix.com