



E b i x / H e a l t h C o n n e c t O n l i n e Q u o t i n g

Ebix/HealthConnect Online Quoting

Ebix/HealthConnect's Online Quoting Application is a web-based small group rating, quoting and proposal generation tool. It automates the everyday rating, quoting and proposal tasks that have traditionally taken place in a time-consuming, paper-based environment. It offers a foundation on which Ebix/HealthConnect's Enrollment and Renewals modules can be added. By bringing these activities online, carriers can make their products available for quoting 24 hours a day, seven days a week, and increase broker or customer satisfaction by offering a more efficient quoting process. The Ebix/HealthConnect solution results in a bottom line advantage for both carrier, broker, and consumer—increased quote activity that leads to more sales. Implementing carrier-branded Ebix/HealthConnect Quoting, carriers enable online quoting without the risk of losing brand recognition. The Ebix/HealthConnect Quoting is constructed using a carrier's own branding and is maintained as an integrated part of the carrier's website. This allows the carrier to distinguish itself in the marketplace while still giving brokers a flexible, real-time quoting tool.



Comprehensive Reference Resources

Brokers have instant access to an extensive online information library, featuring carrier underwriting guidelines, business policies, marketing materials, business forms, and carrier contacts. A link to the carrier's provider directory makes it easy to locate physicians directly from the quoting tool.

The screenshot shows the HealthCONNECT Forms Warehouse interface. At the top, there is a navigation menu with options: Dashboard, Accounts, Admin, MyAccount, Forms Warehouse (selected), Physician Locator, Rate Status, Tasks, Help, IFP Rate Testing, and SEP Configuration. The HealthCONNECT logo is on the left, and session information is on the right. Below the navigation, there is a search bar and a 'Groups' dropdown. A 'Quick Links' dropdown is also present. A 'Forms Warehouse' link is highlighted. The 'Recent Activity' section lists items like 'wp testing 54425 NY', 'NCAS Care First', 'Paul UT TRANS', 'CI', and 'Prospect 35089'. The main content area is titled 'Forms Warehouse' and includes instructions: 'View and Download Forms. Use the available dropdown controls to filter the forms and their types.' Below this, there are filters for 'State' (New York) and 'Carrier' (Empire Blue Cross Blue Shield). A 'Website' link is also visible. The 'Forms' section is divided into 'Enrollment Kit' and 'Other'. The 'Enrollment Kit' section lists various forms with checkboxes: HMO-Not. Of Election-Waiver-Cobra, EPO Group App., EPO Not. of Election-Waiver-Cobra, PPO Group App., PPO Not. of Election-Waiver, HMO Group App., HMO-POS Group Contract, Member Enrollment Form - All Products, and Small Group Application. The 'Other' section lists 'Health Insurance Claim'.

Distribution Options

Ebix/HealthConnect makes attaching important documents and carrier forms a quick and painless task. Whether the broker is drawing a form from its own library or a carrier's website, it only takes a few clicks to add the form to the group's folder. Complete enrollment kits are available, as is access to broker specific marketing documents and BOR's.

Searching

General Agents can find information on agencies, brokers, or groups by searching on any number of available criteria including quote dates, effective dates, carriers, group size, location, and other characteristics.

HealthCONNECT
the employee benefits network

Session | Contact Us | Logout

Dashboard Accounts Users Reports Admin MyAccount Forms Warehouse Physician Locator Rate Status Tasks Help

Search
Groups

Quick Links

Accounts

Recent Activity

- LC CT Support
- United REC MD DC Met...
- UHC MD Dental
- GA TEST
- GRV NY Provider Spri...

Accounts

View and manage accounts. Use the available action icons to edit detailed account information and run quotes.

Views

Edit View Manage Views Advanced Search

Advanced Search

Account Name
Producer Last Name

Account Type
 Group
 Individual
 Type: Any

Quoted in the last
 days
 Renewing in the next
 days

Application Type (Individual Only)
 All Prospects

Quote Type (Individual Only)
 All Types

Policy Number
 Report ID

Include Inactive

Effective date in the previous
 days
 Turning Age 65

Sort By
 Quote Date

Ascending
 Descending

Search

Broker Administration

In addition, carriers can manage user access for licensing, appointment approvals, and can easily maintain broker data and reset usernames and passwords in a real-time environment.

User Search

Please input your search criteria.

First Name:

Last Name:

Status:

General Agent:

Agency Name:

Email:

User Name:

User Type:

Phone:

[New User](#) [Search](#) [Reset](#) [Back](#)

[a mn - Arthur Meister]

Name	User Name	Company	Status	User Type	Agency	Parent Agency	Last Login	
a mn	abcdef	abc	Disabled	Producer	Sub-Producer XYZ	HealthConnect	6/13/2006 1:27:55 PM	Password Details Impersonate
Adam Bruckman	BRUCKMANAD	Digital Insurance	Disabled	Producer	Sub-Producer XYZ	HealthConnect		Password Details Impersonate
Agents: Jean E. Clark, rhu / Steven P. Clark	CT0183	Diversified Group Services, Inc.	Disabled	Producer	Sub-Producer XYZ	HealthConnect	6/24/2004 12:31:06 PM	Password Details Impersonate
Alex Glushanok	GLUSHAN	Alex Glushanok	Disabled	Producer	Sub-Producer XYZ	HealthConnect		Password Details Impersonate

Reports

Carriers can generate activity reports in aggregate or based on specific brokers. Quote volume, group information, selected plans, or even the percentage of work done by the broker vs. the work done by the carriers are available in excel format with only a few clicks.

[Export to PDF](#) [Export to Excel](#)

Number of Rows Returned 13

Rep	Broker	Agency	Broker State	Broker Market	Quote Date	Effective Date	Group Name	EEs (Enroll)	Group State	Group County	Group Zip	Group Market	SIC
Not Assigned	Pils Beth	Gallagher Benefit Services	CT	CT	01/18/2017	02/01/2017	Crossbow Group, LLC	2	CT	Fairfield	6880	CT	8742
Not Assigned	Pils Beth	Gallagher Benefit Services	CT	CT	01/19/2017	03/01/2017	Alt Energy LLC	3	CT	Fairfield	6853	CT	6799
Not Assigned	Pils Beth	Gallagher Benefit Services	CT	CT	02/14/2017	04/01/2017	Mafote Inc	10	CT	Fairfield	6851	CT	0000
Not Assigned	Pils Beth	Gallagher Benefit Services	CT	CT	05/02/2017	07/01/2017	New York Classic Motors, LLC	6	NY	New York	10018	NY	5521



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