



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.



Branding

The Portal is branded to match the carrier's home page so that the "look and feel" of the site remains consistent with all of the carrier's online tools. Carriers can choose to include a link to the Ebix/HealthConnect Quoting tool right from their own producer web site, making it easy and quick for the broker to access the quoting tool. Ebix/HealthConnect also offers direct-to-business, large group, individual and family plan quoting.



Log In

If you are a registered user, please enter your username and password below.

[Click Here to Register](#)

[Forgot Your Password?](#)

User Name

Password

Do not remember my user name.

[Log In](#)

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Registration Confirmation

Each time a new user successfully registers on the site, both the carrier and the user automatically receive electronic confirmation of the registration. The user's confirmation includes verification of the user name and password.

Dear Mr. User,
Thank you for registering with
Aetna MidAtlantic
Your user name is: jbroker
Your password is: 123
Save this email message for your records
as you will need this information in order
to log on to our website.
If you have any questions or comments,
please email us at:
support@aetnamidatlantic.com

Persistent Data

Persistent group information simplifies client data management for carriers by allowing re-quoting without having to re-enter data. Retaining the census and providing the ability to review alternative plan options and review a quoting activity are keys to increased broker satisfaction and loyalty to the carrier.

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Session ? Contact Us Logout

Dashboard Accounts Admin MyAccount Forms Warehouse Physician Locator Rate Status Tasks Help SEP Configuration

Search
Groups

Quick Links

Accounts
Manage Archived Accounts

Recent Activity
Prospect 2394750
GRV PA Provider Save...
GRV PROD Provider Se...
GRV CT Provider Save...
GRV NY Provider Save...

Accounts > Add Group > Test Broker
Please enter the necessary information to add a new group.

General Information

Name (dba)* Main Street Accounting Effective Date* 11/01/2017

SIC 6411 [Pick From List](#)

Address Information

Zip* 11716 OR County Suffolk

State NY City Bohemia

Fax 555-555-5556 Email accounting@gmail.com

Census Information

Census*
Singles (EE) 2
EE+Spouse 1
EE+Child 1
EE+Children 1
Family 1

[Add](#)

* indicates required field

Plan Filtering and Sorting Capabilities

Plan Selection can be tailored to the user's preferences, offering the ability to rapidly access desired plan designs and specifications. Filter options include deductible, coinsurance, copay, drug cards, etc.

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[Add](#)

* indicates required field

Product Comparison

Users can instantly review and compare products, plans and premiums. Benefits can be viewed both at the summary level and at the detail level with just a click of a mouse.

The screenshot displays the HealthConnect web application interface. At the top, there is a navigation menu with options like Dashboard, Accounts, Admin, MyAccount, Forms Warehouse, Physician Locator, Rate Status, Tasks, Help, and SEP Configuration. The main content area shows the 'Plan Wizard' process, including a search bar, a breadcrumb trail (Accounts > Account Summary (Main Street Account...) > Test Broker > Run Quote > Plan Wizard), and a 'Quote by drilling down within a carriers' plan options' section. Below this, there are two main tables: 'Select Plan Criteria' and 'Quoted Health Plans'. The 'Select Plan Criteria' table lists carriers like Aetna, EmblemHealth, and Empire Blue Priority with their respective plan types, copays, and deductibles. The 'Quoted Health Plans' table shows quoted rates for various carriers and plan names, including 'Silver Blue Priority EPO 2700/0%/4500 w/HSA'. A 'Selected Health Plans' table at the bottom shows the chosen plans with their effective dates, zipcodes, and enrollment details. The interface includes 'Back' and 'Next' buttons for navigation.

Site Administration

Ebix/HealthConnect Quoting includes an administrative tool that carriers can use to track and monitor site usage on a broker-by-broker and user-to-user basis. Carriers can find out what groups brokers are quoting and which plans they are pitching most frequently.

HealthConnect Administration Tools

Click the desired option from the Administration Menu.

[Back](#)



[Agency Manager](#)
View and update Agencies.



[Broker List](#)
View and print out a contact sheet for your brokers.



[Edit Carrier Selections](#)
Customize which carriers are available for quoting on your site.



[Agency Administrator Customization](#)
Agency Administrator Customization



[Forms Manager](#)
Manage your Forms Warehouse forms.



[Group Email](#)
Communicate with some or all of your users with this mass email tool.



[Update News Flash](#)
Post news flashes to users.



[Report Customization](#)
Allows users to Customize Reports



[User Manager](#)
View your users, edit user info and change user settings.



[Portal Administration Handbook](#)
This handbook explains administration features available on this page.

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.

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Session ? Contact Us ? Logout

Dashboard Accounts Admin MyAccount **Forms Warehouse** Physician Locator Rate Status Tasks Help IFP Rate Testing SEP Configuration

Search
Groups

Quick Links

Forms Warehouse

Recent Activity

- wp testing 54425 NY
- NCAS Care First
- Paul UT TRANS
- CT
- Prospect 35089

Forms Warehouse
View and Download Forms. Use the available dropdown controls to filter the forms and their types.

Forms

State
New York

Carrier
Empire Blue Cross Blue Shield Website

Enrollment Kit

- 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
- Small Group Application

Other

- 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.

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Session ? Contact Us ? Logout

Dashboard Accounts Admin MyAccount Forms Warehouse Physician Locator Rate Status Tasks Help SEP Configuration

Accounts > Account Summary (Main Street Account...) > Test Broker > Proposal Center

Please complete the information below. Click Send when you are done.

Details

To: <accounting@gmail.com>

Add BCC

CC: "Test Broker" <quandlpublic@ebix.com>

Subject: Forms

Dear M

Please

(templ

Thank Test B (631) wendy 1461 L

Forms

New York

Aetna

Include	Form	Category
<input type="checkbox"/>	NY ER & EE App & Tagline Document	Summary of Benefits and Coverage
<input type="checkbox"/>	NY ER & EE App & Tagline Document	Enrollment Kit
<input type="checkbox"/>	NY Benefit Grid 2017	Benefit Summaries
<input type="checkbox"/>	NY UW Guidelines 2017	Requirements

Attachments

Name	Type	Date	Actions
Physician List (10/26/2017 8:40:17 AM)	Plan Report	10/26/2017 08:40 AM	
NY (10/26/2017 8:29:57 AM)	Plan Report	10/26/2017 08:29 AM	

Send

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.

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

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

Views [dropdown] Edit View Manage Views Advanced Search

Advanced Search

Account Name [text box] Producer Last Name [text box]

Account Type
 Group Individual
 Type [dropdown: Any]

Quoted in the last [text box] days
 Renewing in the next [text box] days

Application Type (Individual Only)
 All Prospects [dropdown]

Quote Type (Individual Only)
 All Types [dropdown]

Policy Number [text box] Report ID [text box]

Include Inactive
 Effective date in the previous [text box] days
 Turning Age 65

Sort By
 Quote Date [dropdown]
 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 [text box] Last Name [text box] User Name [text box]

Status [dropdown] General Agent [dropdown: HealthConnect] User Type [dropdown: Broker]

Agency Name [text box] Email [text box] Phone [text box]

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

[a mn - Arthur Meister] [dropdown]

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

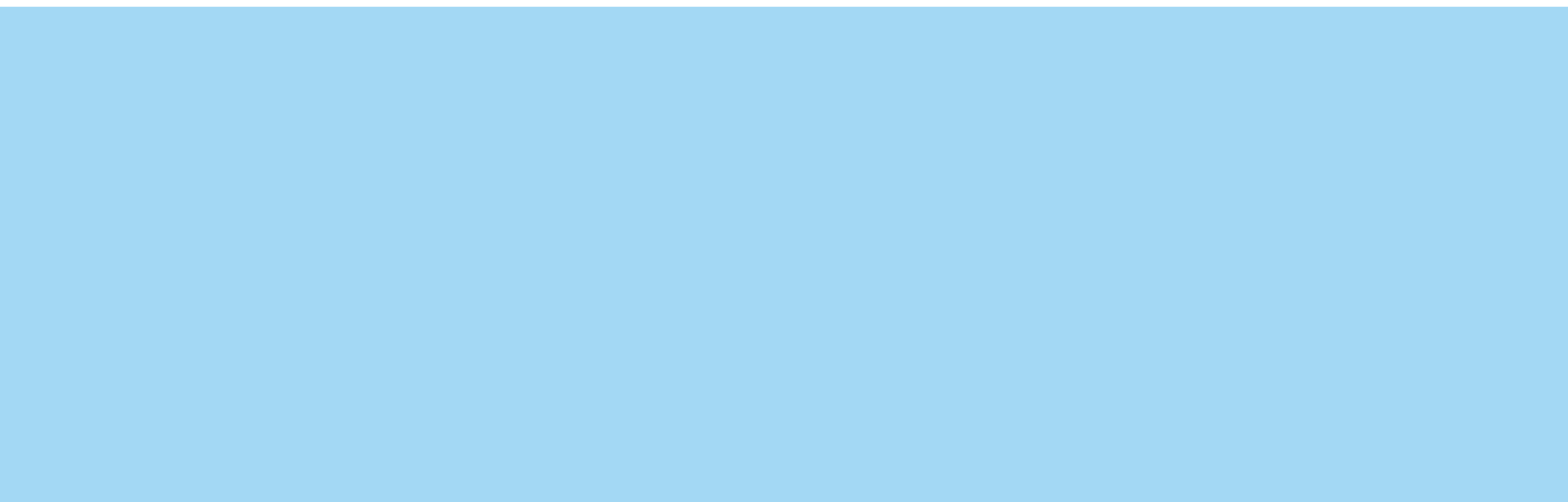
Reports

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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