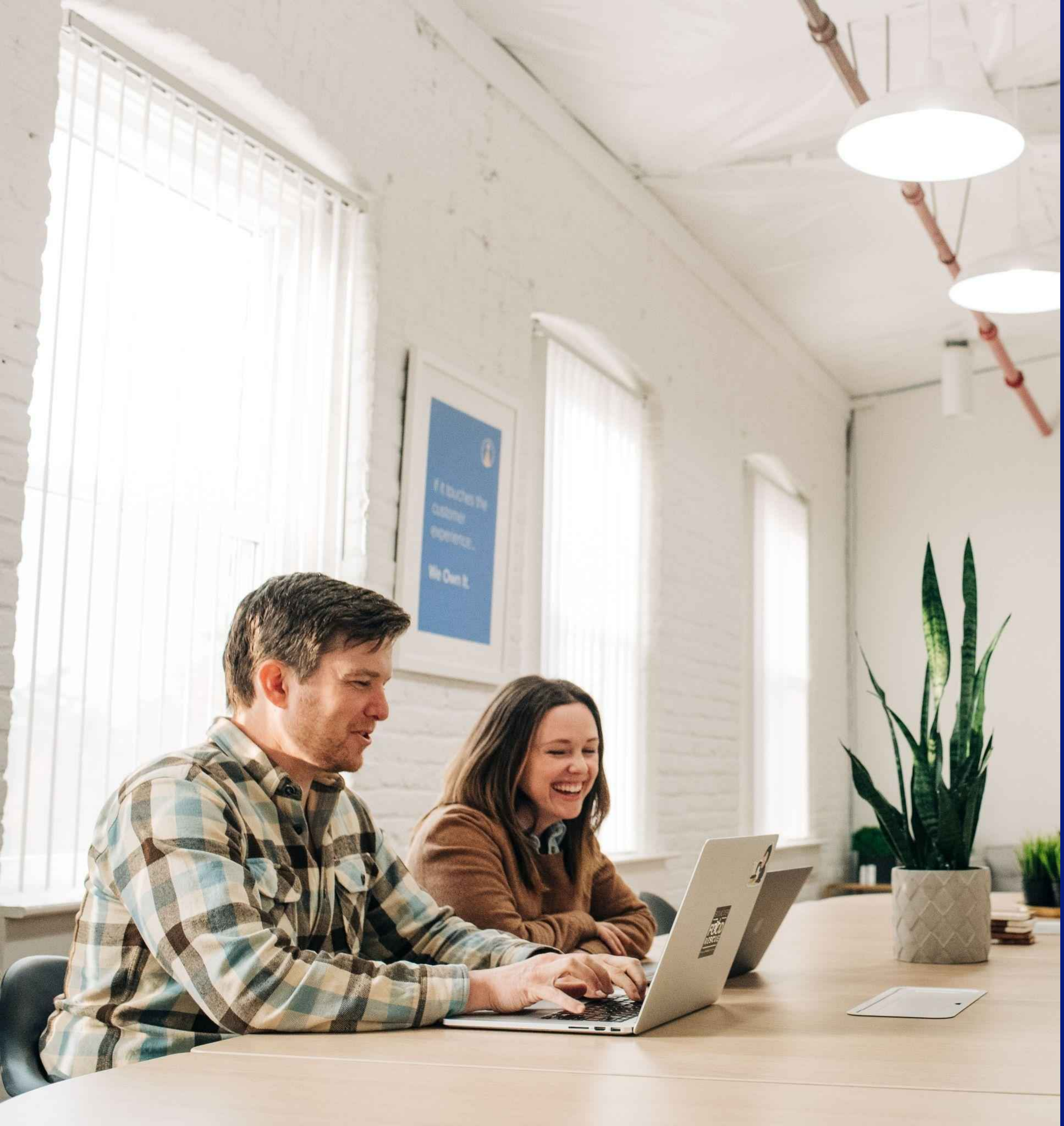

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Digital Quoting Training Deck

Welcome to the Benefix Platform

Managing your entire small group book of business just got easier!
No paper, no duplicated data entry - just more time with your clients 👍

It's our #1 priority to ensure you have an excellent experience with Benefix from day one, so we've compiled this concise quoting guide to provide a clear path for success in the **first few weeks and beyond**.

Quoting Deck Table of Contents

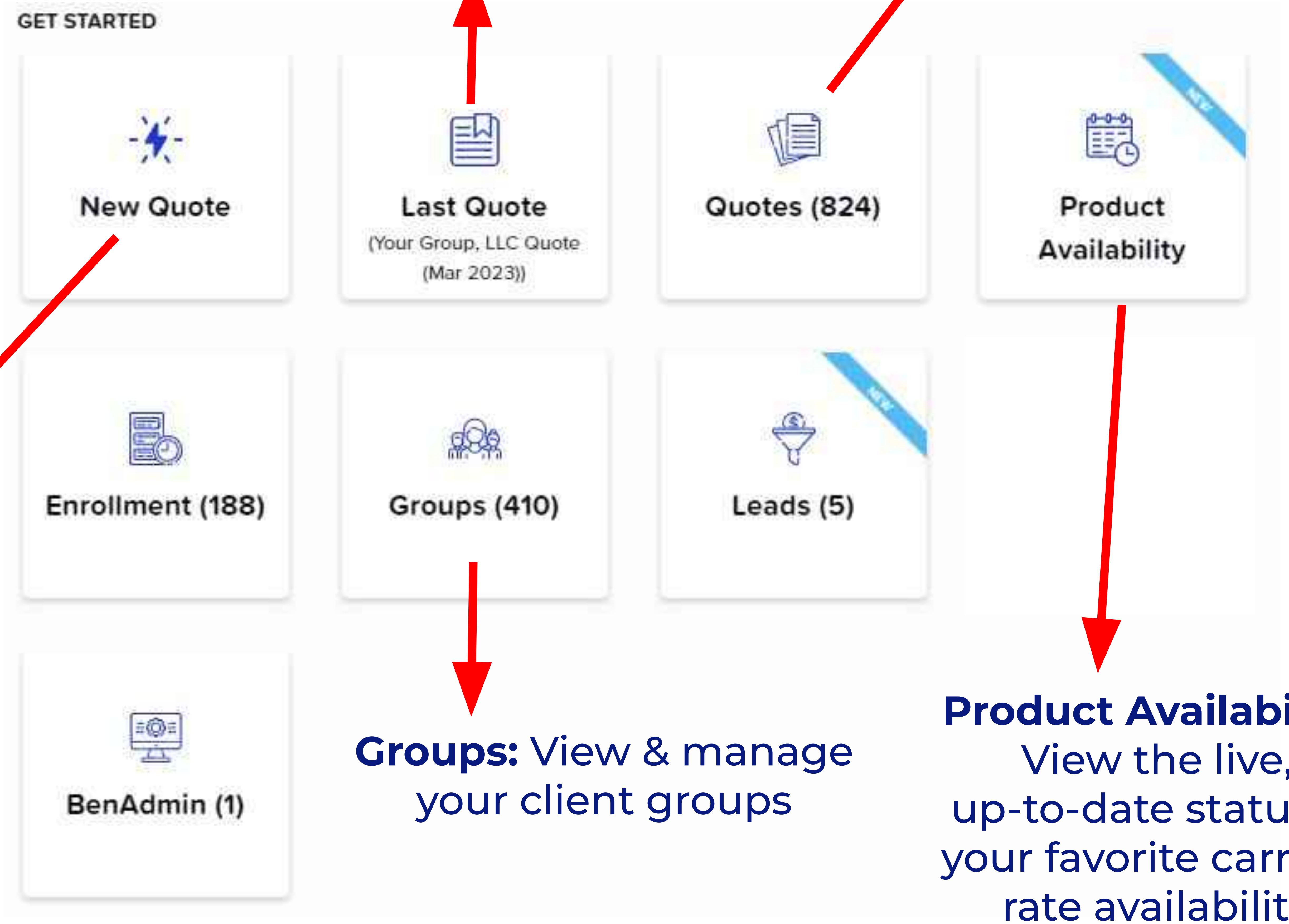
Your Dashboard

Welcome to Benefix! 👋

After logging in to your account, you will meet your **dashboard.** From here, you can **navigate to each page** within the platform.

Last Quote: Navigate to the last quote updated

Quotes: View & manage your entire quote history



New Quote: Click here to start a new quote

Groups: View & manage your client groups

Product Availability: View the live, up-to-date status of your favorite carrier's rate availability

***NOTE:** Leads and BenAdmin are upgrades. Please talk to our Sales team for more information!*

Account Settings

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How to Update your Account Settings

To update settings like your **password, personal information, and general quoting preferences,** click on your name in the top right corner of the platform! From the drop down menu, click on **'Your Information.'**

New Quote & Step 1 - Quote Details

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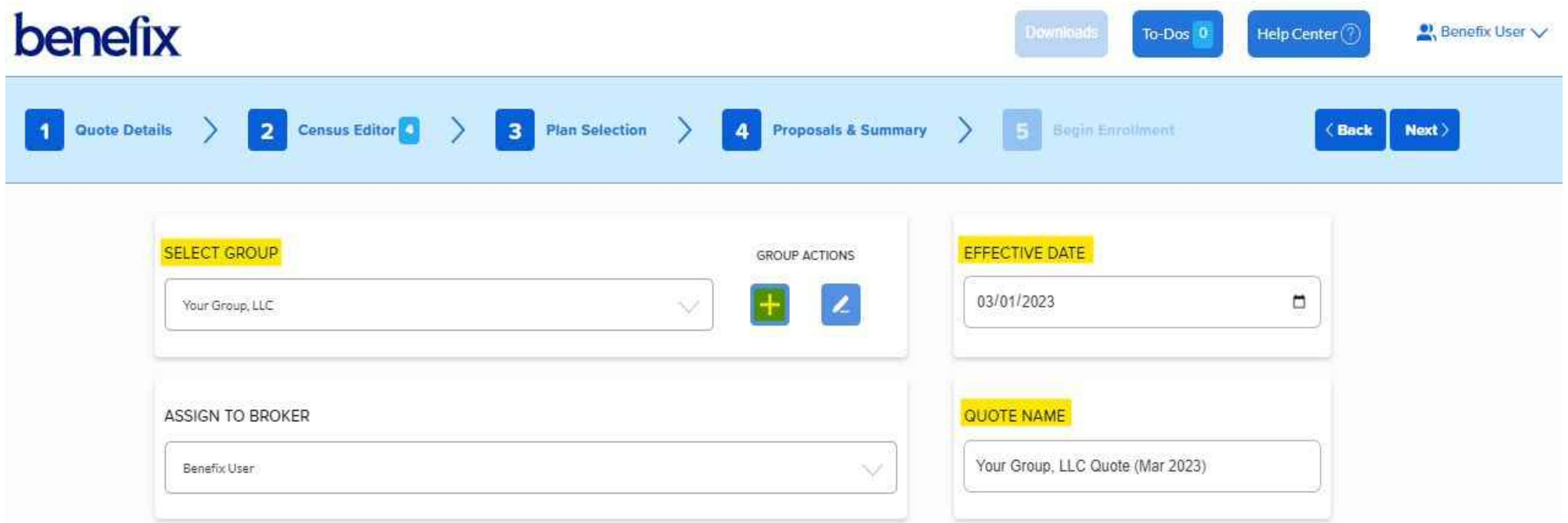
Setting up your Quote in Step 1

Click on **'New Quote'** from your dashboard. This will take you to Step 1 of the quoting process. Here, you will enter the quote's **effective date** and the **group's information.** You can easily name your quote for your records as well!

You can either choose the group from the **'Select Group'** dropdown or if it is a new group, you will need to click the **blue 'plus sign' under 'Group Actions.'**



Adding a New Group

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Adding New Group Information

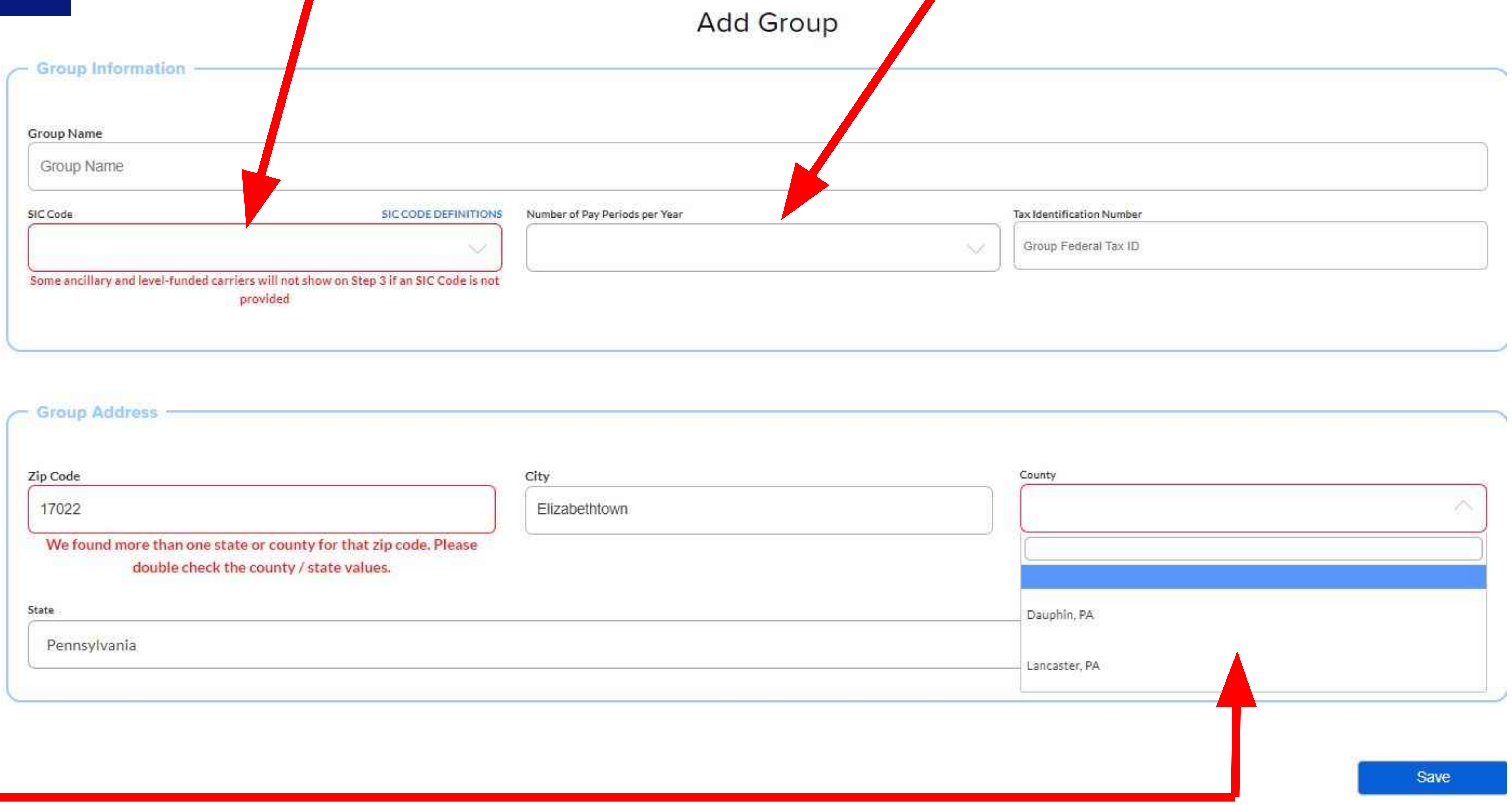
Once you click the **'plus sign'** to add a group, you will **enter the group's information.**

Entering a **Zip Code** will automatically generate the city, state and county.

If it's a **split county zip code**, the system will prompt you to choose which county the group is located in. This can be important for eligibility.

SIC Codes are needed for some level-funded and ancillary products. Click here for SIC definitions.

Number of Pay Periods may be needed for some ancillary products and contribution scenarios.



Step 2 - Census Editor

Setting Up your Census

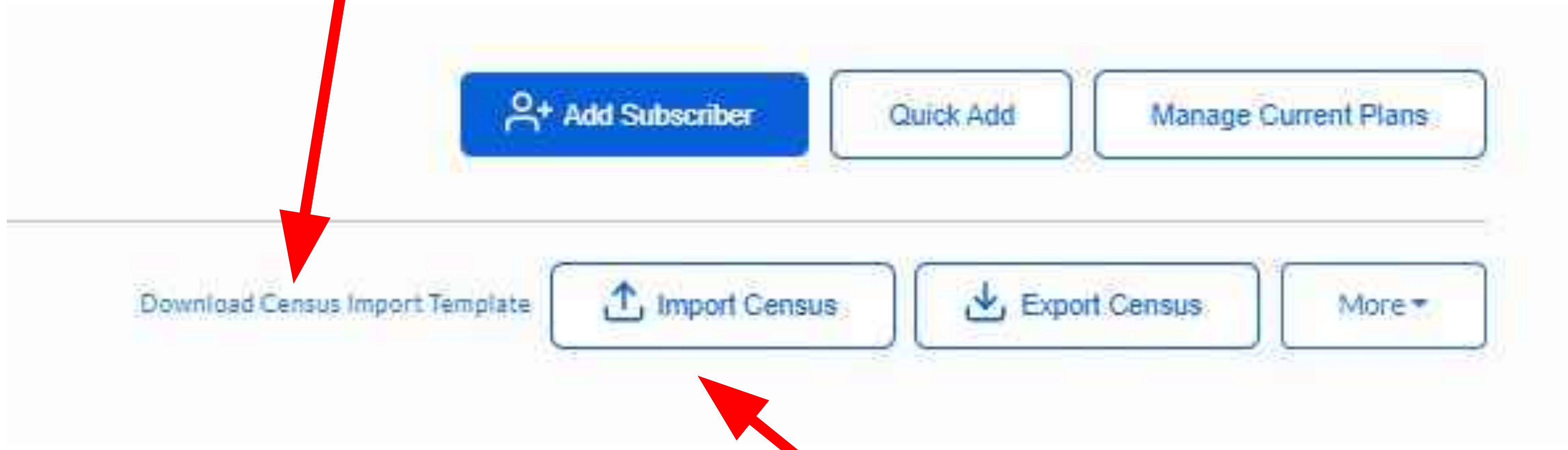
On **Step 2**, you will enter your group's census. There are a few ways to get started:

You can add members manually by using the **'Add Subscriber'** button.

Or **import your census** via the **'import census'** button. Click on **'Download Census Import Template'** to download our census template.

This template includes **instructions** for use on the **'Help' tab along the bottom.**

Download the template directly from the platform here



When completed, you can **import** your census with this button

Step 2 - Adding A Current Plan

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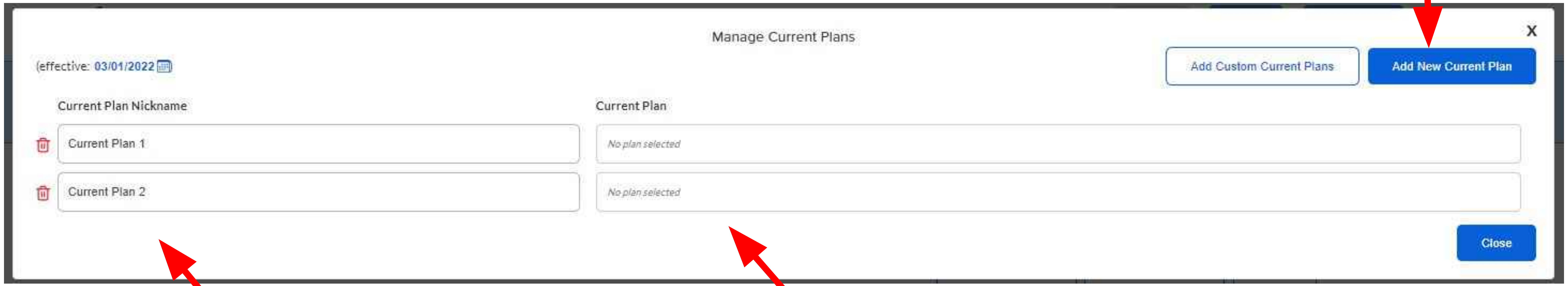
Manage Current Plans

Add and manage current plans in Step 2! First, choose the **‘Manage Current Plans’** button. Next, add the number of plans your group is currently enrolled in.

This is also useful for setting up a **multi-option quote** for different scenarios!

Add any number of current plans or option groups by clicking the **‘Add New Current Plan’** button



Customize the name of your current plan groups that will translate into your proposal

Search for the current plan here, and a list will appear for you to **choose your groups plan**

Step 3 - Plan Selection

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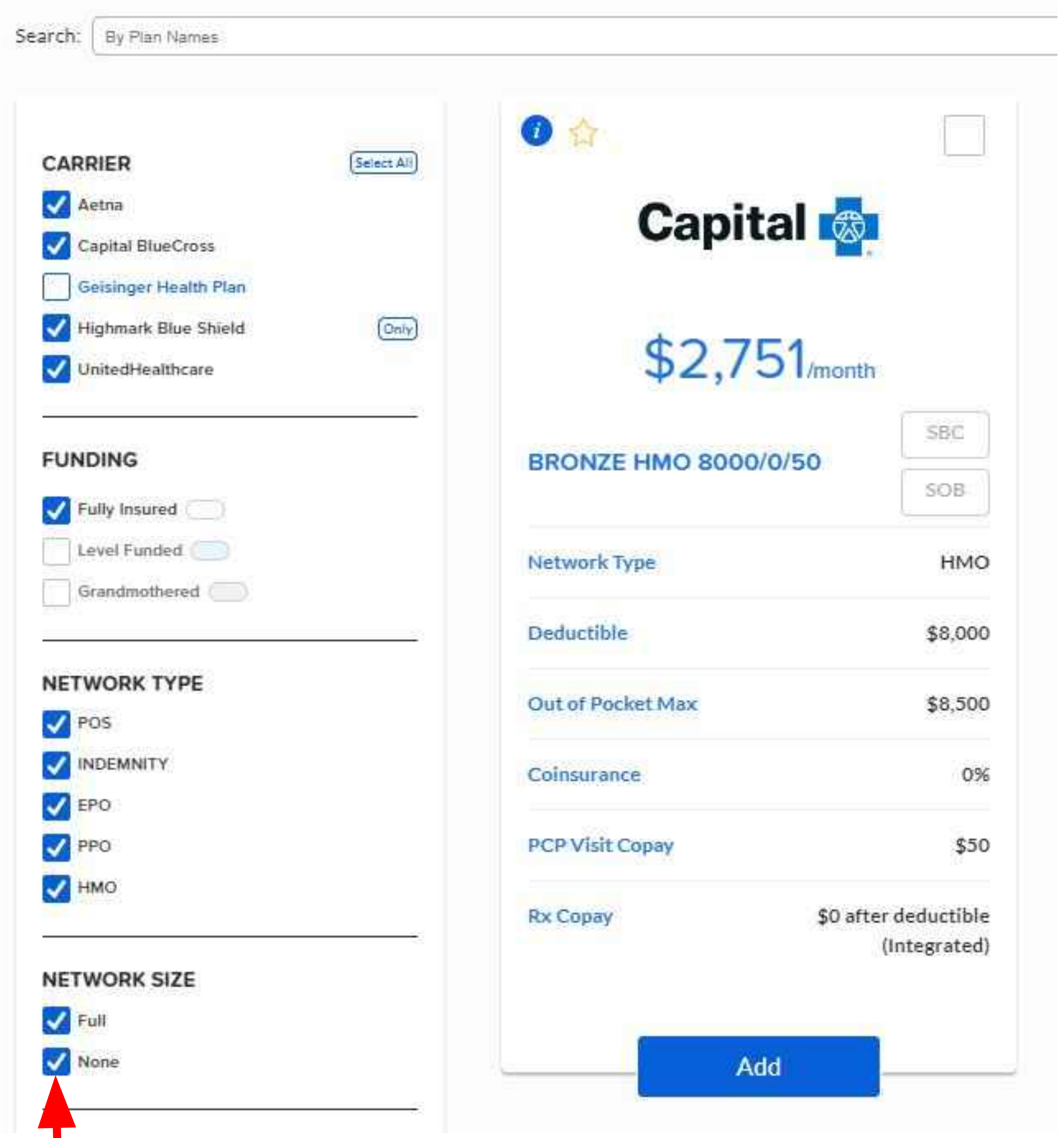
Navigating Plans for your Group

In Step 3, navigate between **Medical, Dental and other ancillary products** by using the tabs at the top of the **Plan Selection page**.

All plans your group is eligible for will appear here. Search for exact plan names in the **Search** field at the top of the page.

Use the **filters** on the left side of the screen to **bring up specific carriers** and **narrow down results.**



Use the **check marks** or hover over filters and choose **"Only"** to change the filters.

Step 3 - Plan Selection - Continued

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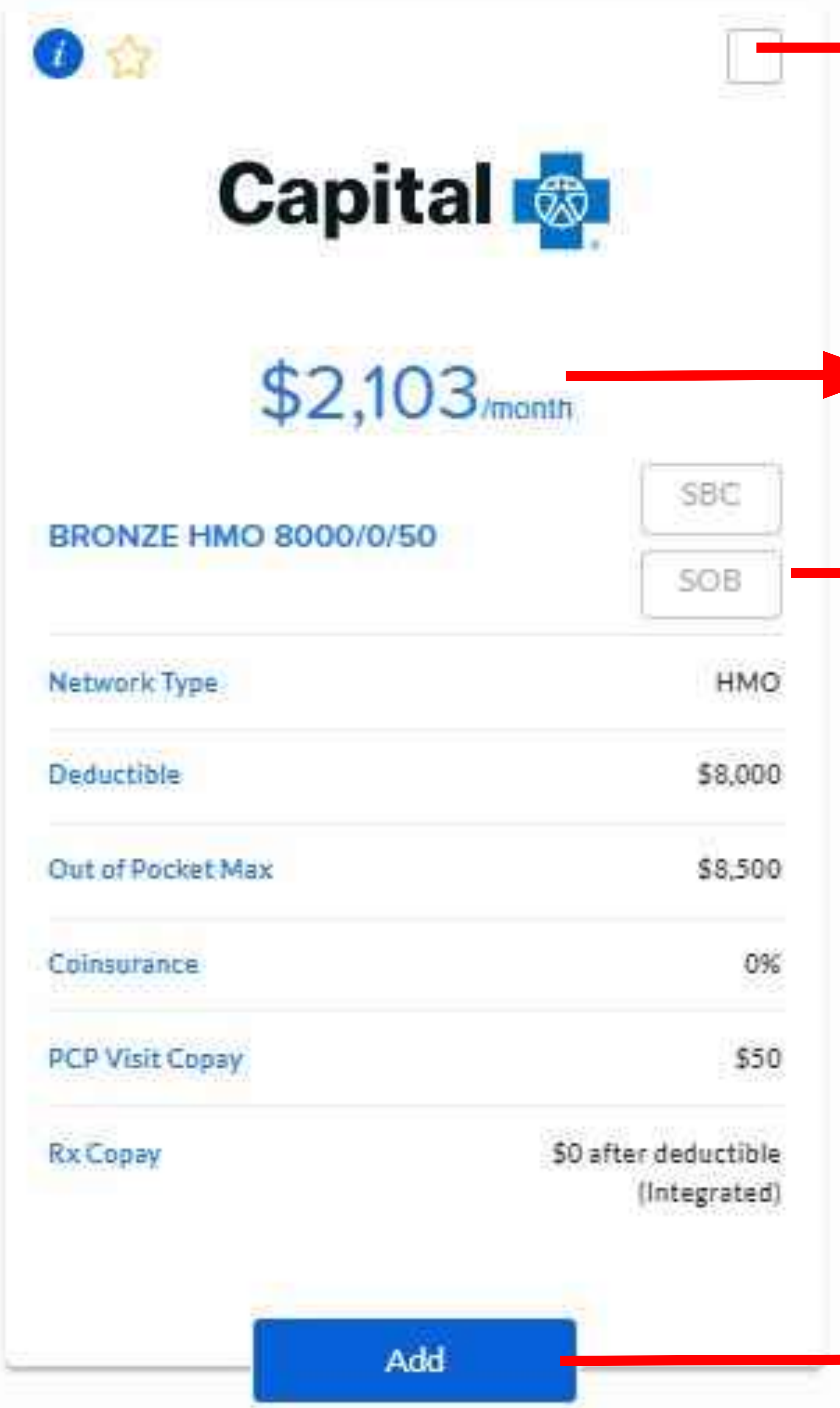
Plan Information and Choosing Plans

In Step 3, you can find **plan information links** by clicking on the **plan name** to view the SBC or SOB. Click on the **premium amount** to find the rate grids for each plan.

Click the ***'i'*** button to see a snapshot of **plan details. 'Favorite' your plans** by clicking on the gold star



Links to the plan **rate table**

Links to plan **SBCs** and/or **SOBs**

Click on **either** of these buttons to **add a plan** to your group's quote

Step 4 - Proposals & Settings

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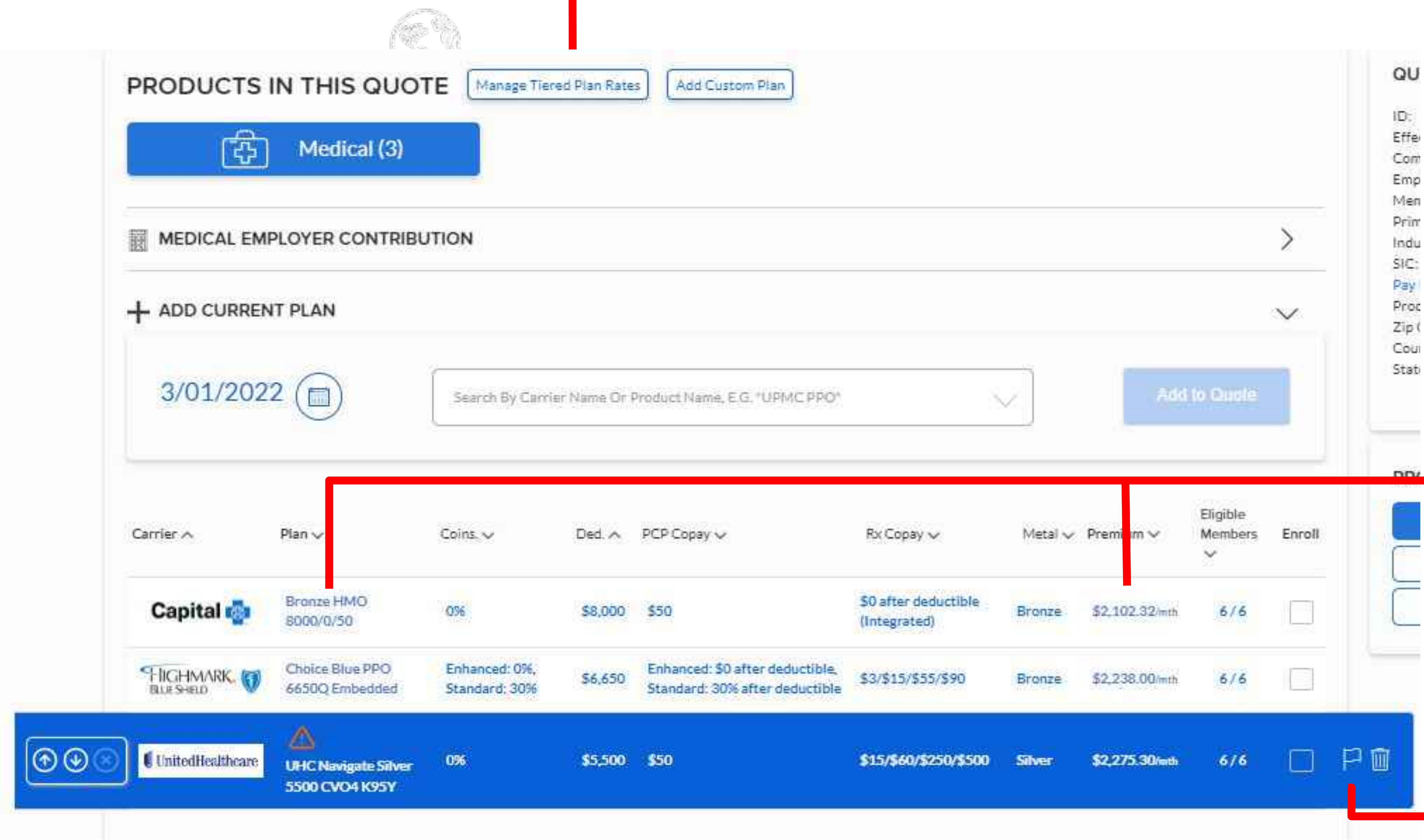
Use the **'Manage Tiered Rates'** button to input underwritten level funded rates!



Finishing Touches on your Group's Quote

In Step 4, you can add **employer contributions**, mark your group's **renewal plan**, access plan information and generate your **group's proposal!**

Just like Step 3, if you click on the **plan name**, you will find **plan information**, and if you click on the premium, you will find the **rate grid**

Click on the **flag** next to a plan to mark it as the **group's renewal**

Step 4 - Proposals & Settings - Continued

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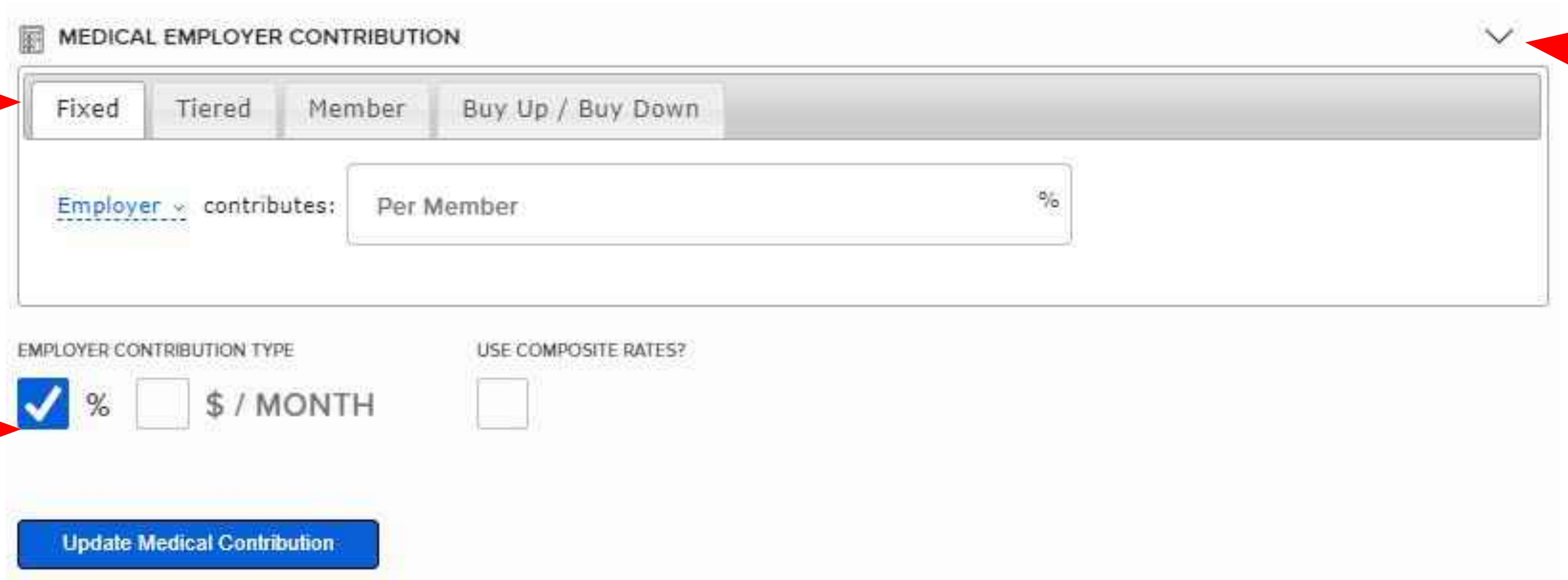
Choose between different **contribution scenarios** and **contribution types**



Employer Contributions

Set up **employer contributions** by clicking on the arrow to expand this tool in Step 4. When completed, click the **'Update Medical Contributions'** button to save.

These contributions will automatically translate into your proposal.

NOTE: *This is where you would create Buy Up / Buy Down scenarios and enable the use of composite rates.*

Step 4 - Proposals & Settings - Continued

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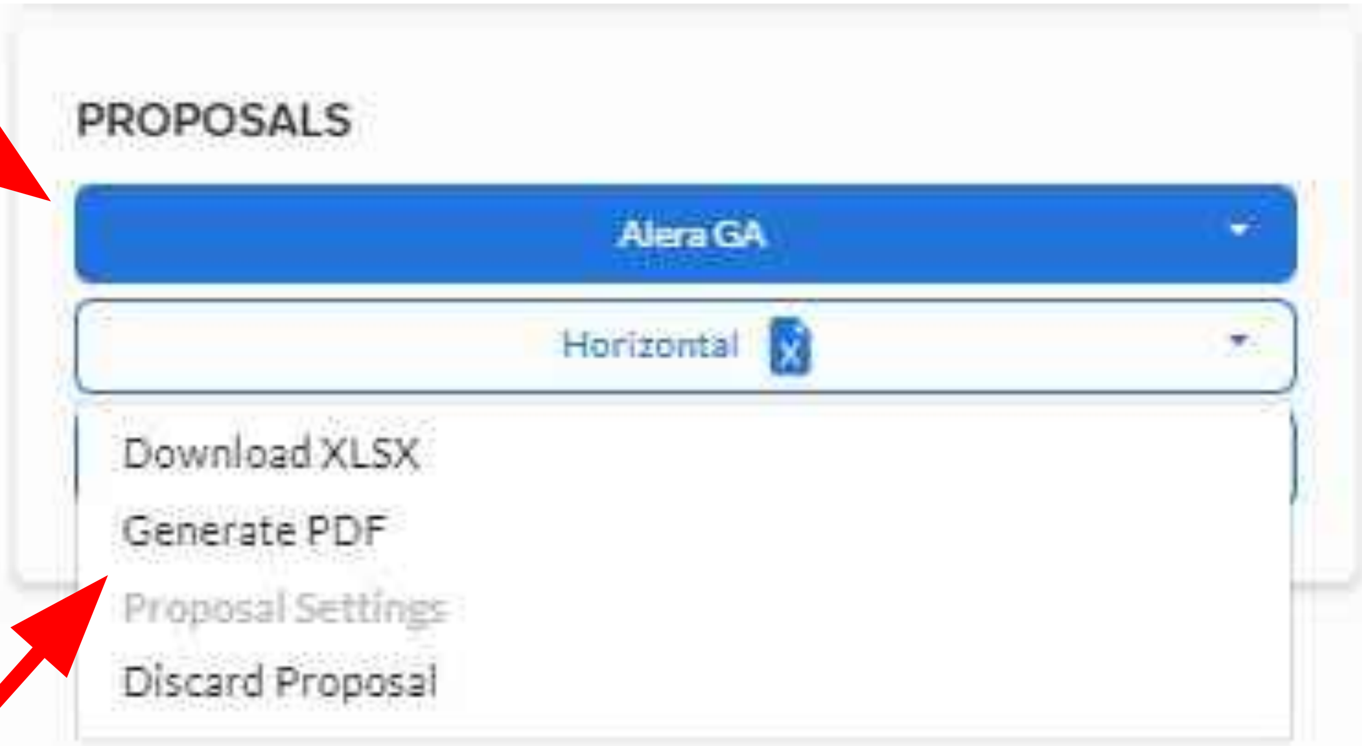
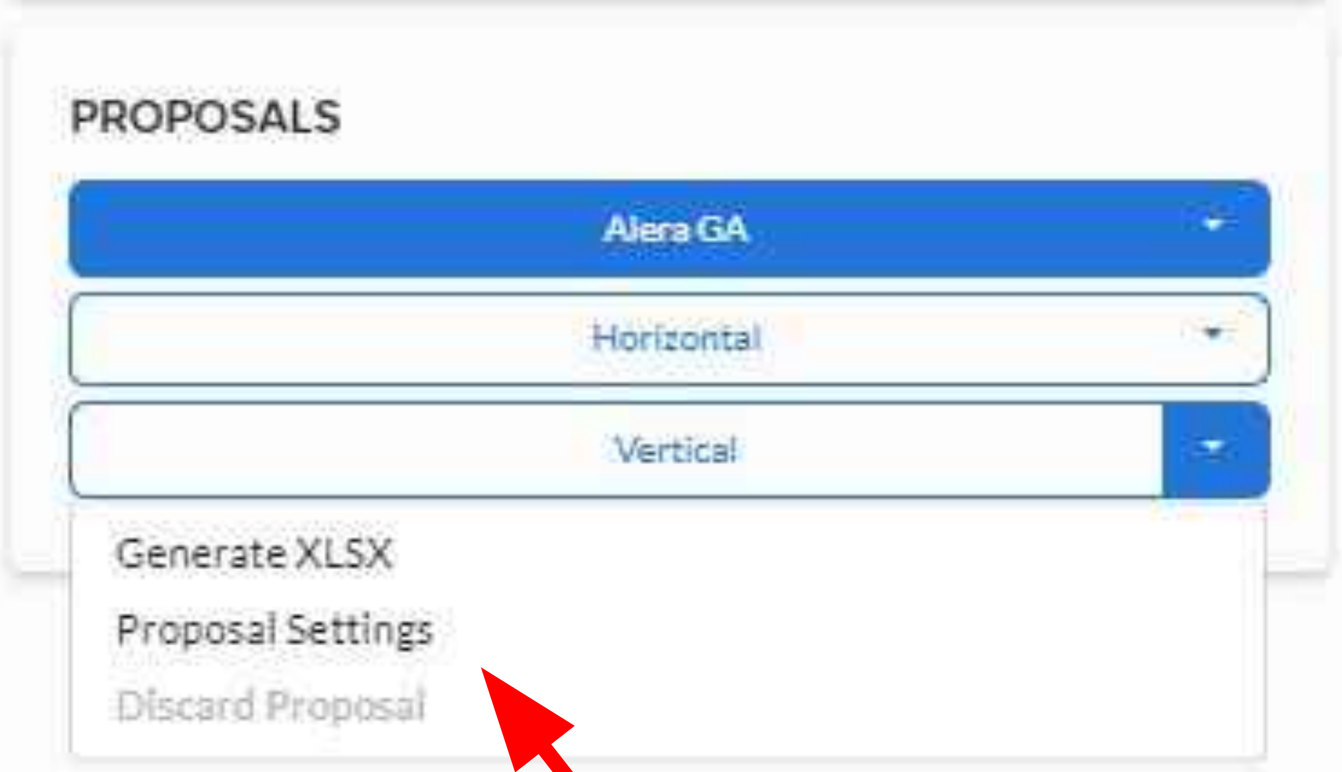
Generating your Proposal

Once your quote is completed, simply **click** on the proposal option that best suits your group to **download an excel** version of your proposal.

To generate a PDF version of your proposal, the Excel version of the proposal must be generated first then click the down arrow and choose **'Generate PDF.'**





If you would like to **adjust settings** in your proposal, **before you generate it**, click the down arrow and select **'Proposal Settings'**

Useful Tools

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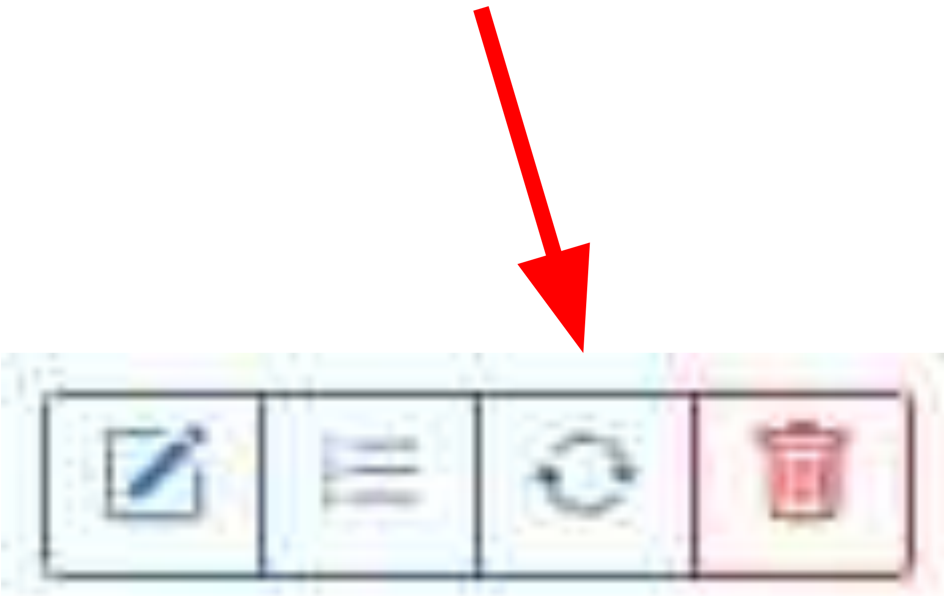
ReQuote creates a new quote for a group previously quoted. This feature is perfect when you want to run a renewal but want to preserve your historical quoting data.

Access this tool on either the **quotes or groups page** by using this button. ReQuoting will bring forward all group and census information from the previous quote!



The **Product Availability Tracker** is a useful tool that is accessible from the dashboard. It provides **up-to-date rate information** on all states and carriers that are relevant to your account!

CARRIER Highmark Western	Count 4			
33	Dental	Enhanced Support	Q1 Q2	Awaiting Carrier Materials
34	Vision	Enhanced Support	Q1 Q2 Q3 Q4	Awaiting Carrier Materials
35	Fully Insured Medical	Enhanced Support	Q1	Awaiting Carrier Materials
36	Grandmothered Medical	Essential Support	Full Year	Awaiting Carrier Materials
CARRIER Independence	Count 3			
37	Dental	Enhanced Support	Q1	Awaiting Carrier Materials
38	Fully Insured Medical	Enhanced Support	Q1	Awaiting Carrier Materials
39	Grandmothered Medical	Essential Support	Full Year	Awaiting Carrier Materials

On the tracker, choose between **states** in the drop down menu at the top of the screen. A list of **products by each carrier will be on the left** and their **status on the right.**

Support Channels

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Help Center 🤓

help.benefix.us

- How do I...?
  - Fill out my census
  - Upload my logo
  - Add a current & renewal plan

BFX Chat

- Your census won't upload
- The plan you are looking for isn't showing up
- Your proposal isn't generating

Your Internal Support Team ✏️

- Plan specific questions
- Contribution calculation & modeling questions
- Adding a user

Your Notes

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Thanks for Quoting on Benefix!