



benefix

**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.**



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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

GET STARTED


New Quote


Last Quote
(Your Group, LLC Quote
(Mar 2023))


Quotes (824)


Product Availability

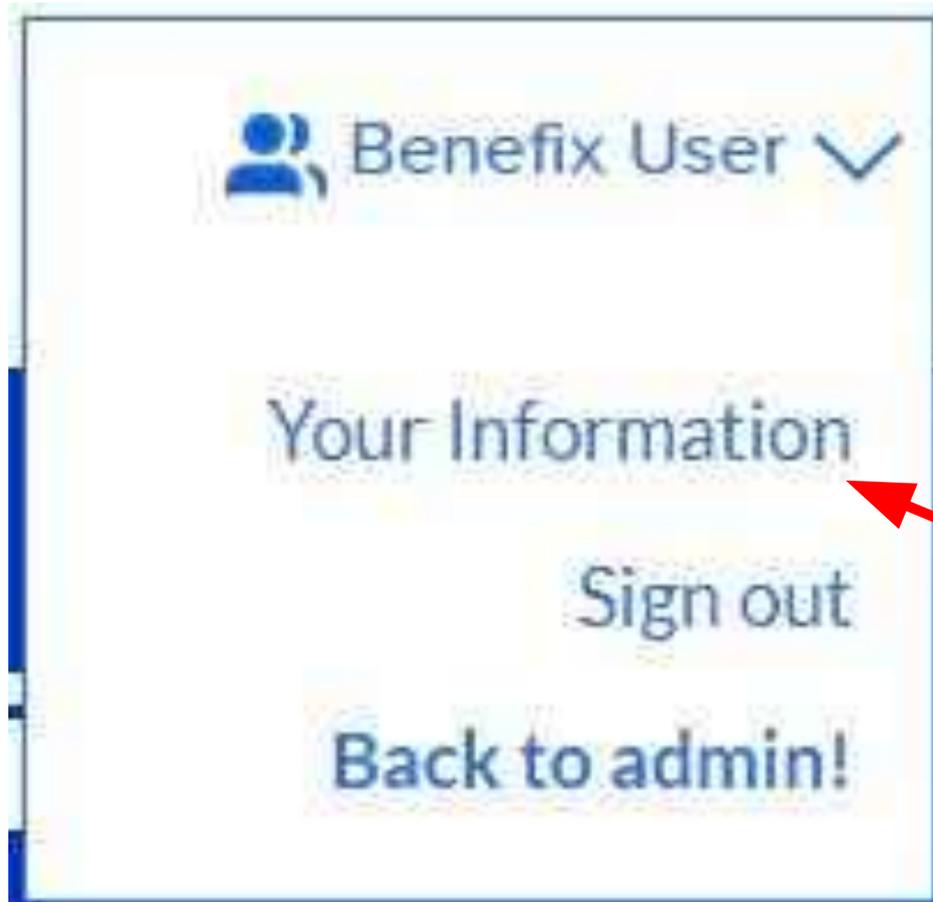

Enrollment (188)


Groups (410)


Leads (5)


BenAdmin (1)

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



How to Update your Account Settings

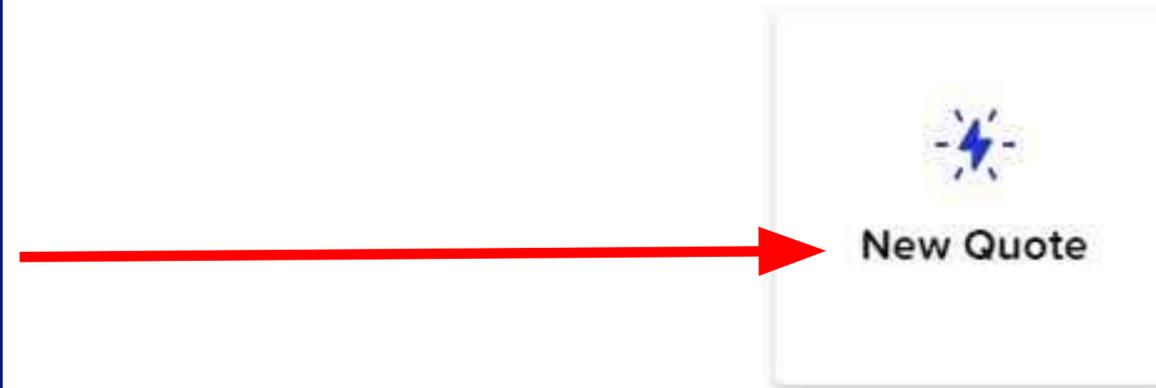
To update settings like your **password, personal information, and general quoting preferences**, click on your name in the top right corner of the platform! From the drop down menu, click on **'Your Information.'**

New Quote & Step 1 - Quote Details

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.'**

The screenshot shows the 'Quote Details' step of the quoting process. At the top, the 'benefix' logo is on the left, and navigation links for 'Downloads', 'To-Dos' (with a '0' badge), and 'Help Center' are on the right. A user profile 'Benefix User' is also visible. Below this is a progress bar with five steps: '1 Quote Details' (active), '2 Census Editor', '3 Plan Selection', '4 Proposals & Summary', and '5 Begin Enrollment'. 'Back' and 'Next' buttons are at the end of the bar. The main content area contains four form fields: 'SELECT GROUP' with a dropdown menu showing 'Your Group, LLC' and a 'GROUP ACTIONS' section with a green plus sign and a blue pencil icon; 'EFFECTIVE DATE' with a date field set to '03/01/2023'; 'ASSIGN TO BROKER' with a dropdown menu showing 'Benefix User'; and 'QUOTE NAME' with a text field containing 'Your Group, LLC Quote (Mar 2023)'. The labels 'SELECT GROUP', 'EFFECTIVE DATE', and 'QUOTE NAME' are highlighted in yellow.

Adding a New Group

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.

Add Group

Group Information

Group Name

SIC Code SIC CODE DEFINITIONS
Some ancillary and level-funded carriers will not show on Step 3 if an SIC Code is not provided

Number of Pay Periods per Year

Tax Identification Number

Group Address

Zip Code
We found more than one state or county for that zip code. Please double check the county / state values.

City

State

County

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

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

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**.

Search:

CARRIER Select All

- Aetna
- Capital BlueCross
- Geisinger Health Plan
- Highmark Blue Shield Only
- UnitedHealthcare

FUNDING

- Fully Insured
- Level Funded
- Grandmothered

NETWORK TYPE

- POS
- INDEMNITY
- EPO
- PPO
- HMO

NETWORK SIZE

- Full
- None

Capital

\$2,751/month

BRONZE HMO 8000/0/50 SBC SOB

Network Type: HMO

Deductible: \$8,000

Out of Pocket Max: \$8,500

Coinsurance: 0%

PCP Visit Copay: \$50

Rx Copay: \$0 after deductible (Integrated)

Add

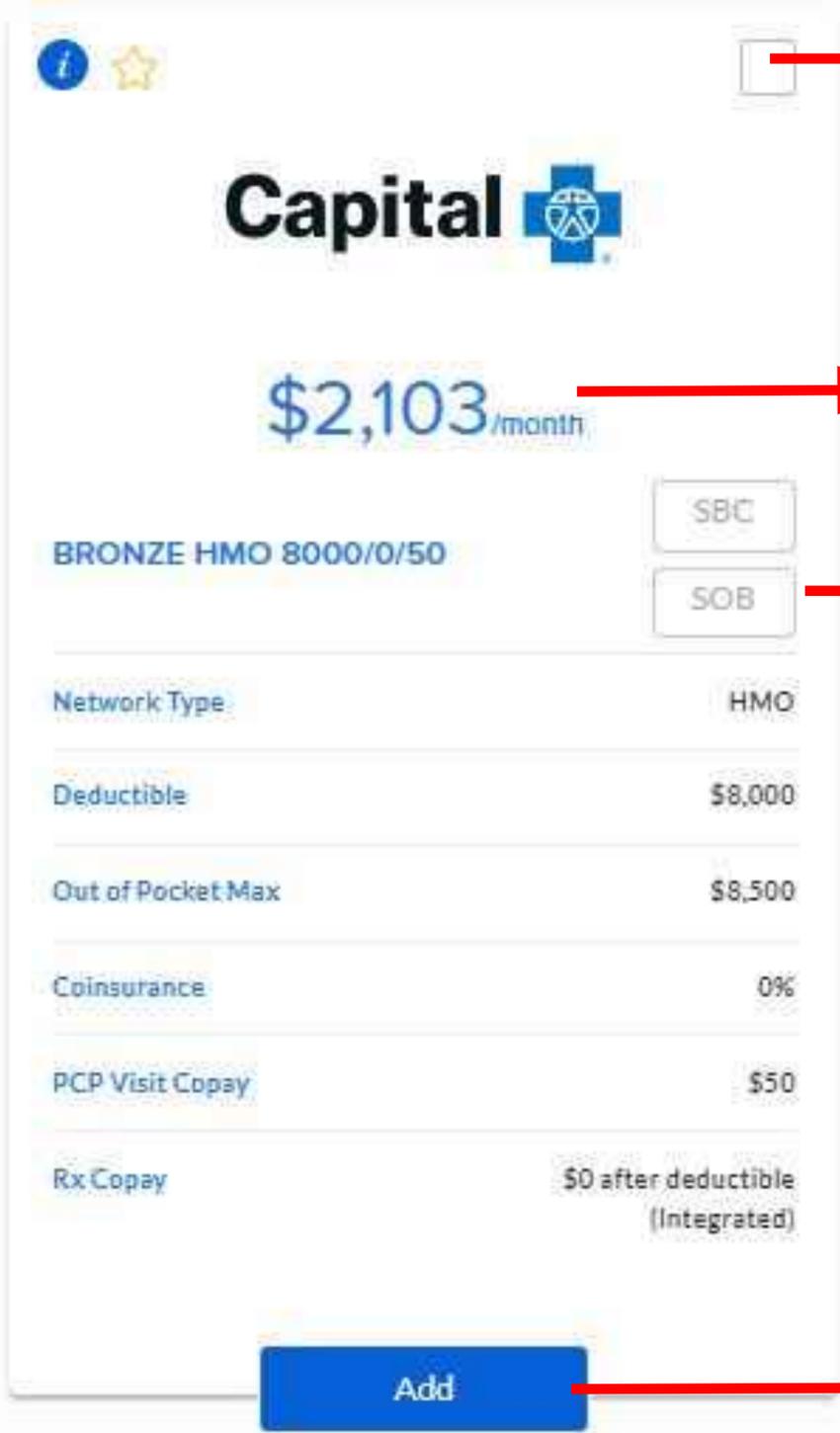
Use the **check marks** or hover over filters and choose **“Only”** to change the filters.

Step 3 - Plan Selection - Continued

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

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**

Carrier	Plan	Coins.	Ded.	PCP Copay	Rx Copay	Metal	Premium	Eligible Members	Enroll
Capital	Bronze HMO 8000/0/50	0%	\$8,000	\$50	\$0 after deductible (Integrated)	Bronze	\$2,102.32/mth	6 / 6	<input type="checkbox"/>
HIGHMARK BLUE-SHIELD	Choice Blue PPO 6650Q Embedded	Enhanced: 0%, Standard: 30%	\$6,650	Enhanced: \$0 after deductible, Standard: 30% after deductible	\$3/\$15/\$55/\$90	Bronze	\$2,238.00/mth	6 / 6	<input type="checkbox"/>
UnitedHealthcare	UHC Navigate Silver 5500 CVO4 K95Y	0%	\$5,500	\$50	\$15/\$60/\$250/\$500	Silver	\$2,275.30/mth	6 / 6	<input type="checkbox"/>

Step 4 - Proposals & Settings - Continued

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

MEDICAL EMPLOYER CONTRIBUTION

Fixed Tiered Member Buy Up / Buy Down

Employer contributes: Per Member %

EMPLOYER CONTRIBUTION TYPE: % \$ / MONTH

USE COMPOSITE RATES?:

Update Medical Contribution

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.

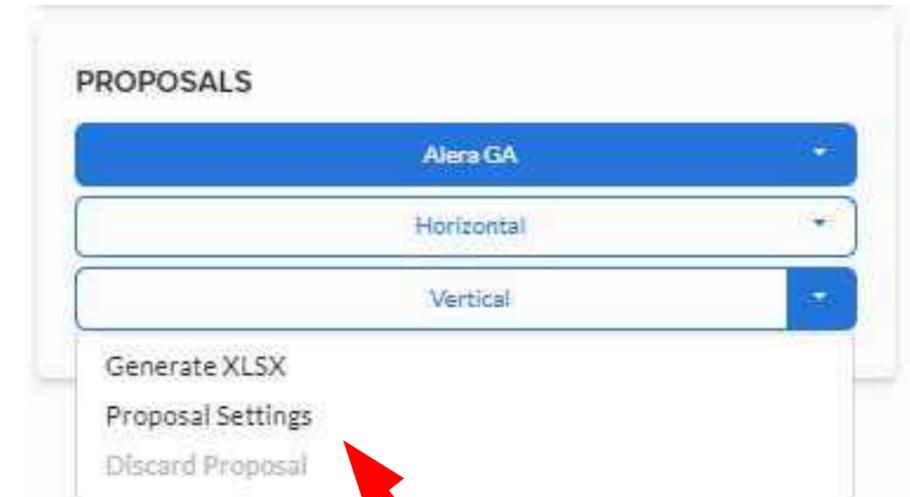
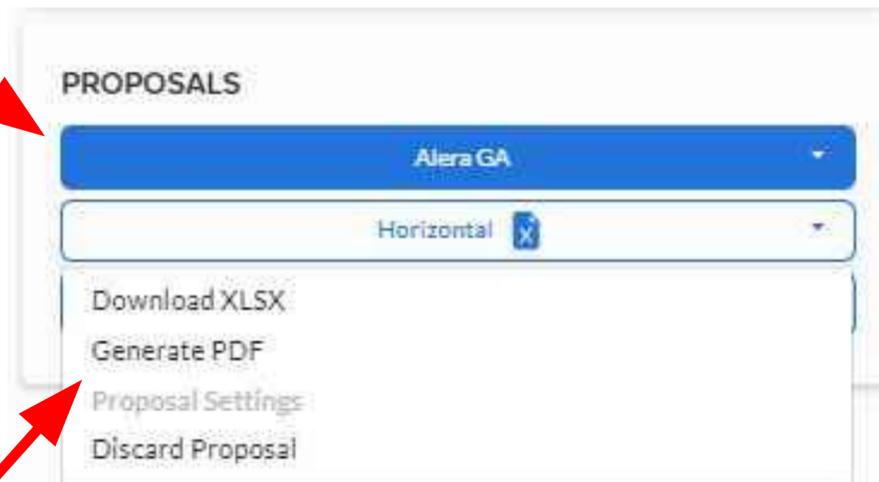
NOTE: This is where you would create Buy Up / Buy Down scenarios and enable the use of composite rates.

Step 4 - Proposals & Settings - Continued

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.'**

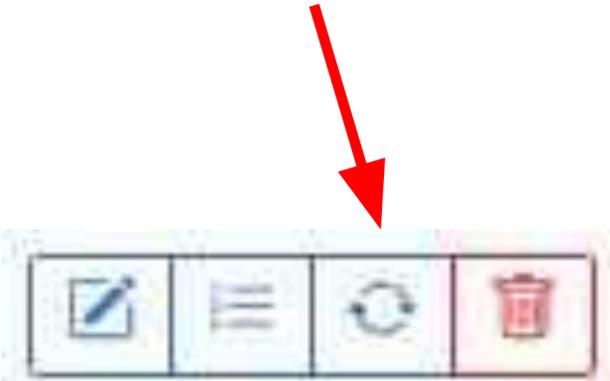


If you would like to **adjust settings** in your proposal, **before you generate it**, click the down arrow and select **'Proposal Settings'**

Useful Tools

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		Count			
▼ 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		Count			
▼ 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.**



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!**

