

bpQuote to EaseCentral Enrollment Export

The Enrollment Export feature will quickly transfer data from bpQuote to EaseCentral. The Enrollment Export feature can be found in on the main page of bpQuote and on the Proposal Options page of a group.

Enrollment Export from Proposal Options

1. On the Proposal Options page of the group you want to export to EaseCentral (correct census and plan information), click the "Enrollment Export" button at the bottom of the page to start the export process. Please note that at least one other proposal option will need to be checked to continue.

Enrollment Export

Click the **Enrollment Export** button to start the enrollment export process using the census and plan information from this quote.

Please note that none of the selected proposal options will be generated upon clicking this button. If you wish to generate a proposal please use the buttons at the bottom of this page.

Enrollment Export

We are excited to announce that we have added bookmarks to our California PDF proposal output.
Click [here](#) for detailed information regarding this enhancement.

2. Confirm the number of employees and deselect any plans you do not want to transmit to EaseCentral.

Quote from 07/14/2017 1:17 PM

Effective Date	Employees	Medical
08/01/2017	2	2

Plan Information

MEDICAL PLANS (2 plans selected)

Carrier	Type	Plan	Premium
<input checked="" type="checkbox"/> Anthem Blue Cross	PPO	Gold PPO 500/20%/6500	\$2,072.87
<input checked="" type="checkbox"/> Anthem Blue Cross	PPO	Platinum PPO 200/10%/4000	\$2,437.81

3. The next page will ask you for the email of Agent the group will be associated with on the EaseCentral platform. You can confirm or change this address before continuing or leave it blank. Add in any contribution information you would like to transfer on this page.

Agent Email

This should be the email of the Agent the group will be associated with on the EaseCentral platform.

Email Address

Contribution Information

Do you wish to include employer contribution details?

Yes No

Medical Contribution Details

Type Base Plan

Employee Dependent

Pay Cycle

- You'll arrive at a summary page to confirm everything is correct before validating your EaseCentral account.

Please confirm all information below is correct.

PLEASE REVIEW ALL OF THE INFORMATION BELOW

Upon clicking the 'Submit' button you will be redirected to EaseCentral to login and grant permission to transfer this enrollment information. You will be redirected back to HealthConnect once the enrollment information transfer has been completed.

Please check the default plan names exported to EaseCentral to make sure that the corresponding plans will be checked off on the Employee Application(s) you select. Default plan names can be corrected within EaseCentral, if needed.

Agent Information				
Agent Email				
Group Information				
Group Name	Effective Date			
New Group to Export	08/01/2017			
Address	Phone			
94597				
SIC	Fax			
7372				
Employer Medical Contributions				
Employee 100% Dependent 0%				
Employee Information				
Employee Id	Name	DOB	Gender	Relationship
52201994	Joe Smith	01/01/1980	Male	Employee
52201994	Jane Smith	02/04/1980		Spouse
52201994	John Smith	12/01/2005		Child
52201995	Joanne Smith	01/01/1970	Female	Employee
Plan Information				
MEDICAL PLANS				
Carrier	Type	Plan	Premium	
Anthem Blue Cross	PPO	Gold PPO 500/20%/6500	\$2,072.87	
Anthem Blue Cross	PPO	Platinum PPO 200/10%/4000	\$2,437.81	

- After submitting, you will be taken to the EaseCentral validation where you will need to enter in your domain that precedes the ".easecentral.com".


Sign In

Enter your EaseCentral domain.

.easecentral.com

- Then use your standard EaseCentral login credentials to complete the validation. EaseCentral will ask you to "Grant Access" for Ebix to create the new group in EaseCentral with exported date.

EaseConnect



EBIX HealthConnect from *EBIX On-Demand Insurance Solutions* is for asking permission to:

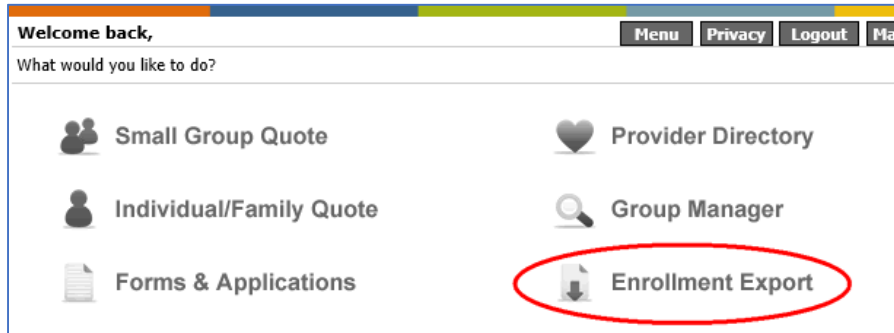
- Import data necessary to establish a new group with the carrier(s), package(s), plan(s), benefits, rates, eligibility, employer contribution(s) and pay-period(s) from the application.

Granting access will allow EBIX HealthConnect to perform these actions on your behalf as needed.

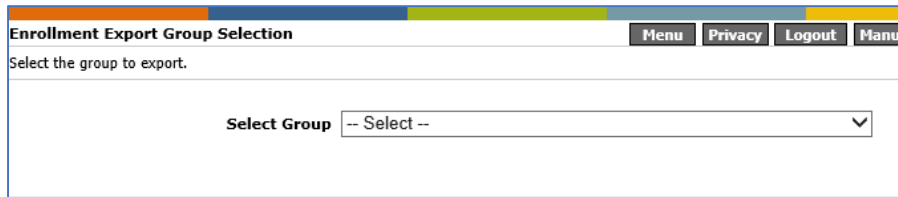
- Your quote data will transfer over to EaseCentral and you will be taken back to bpQuote. Your exported quote will be under the Agent's account associated with the email address entered during the export process. If you left the email address blank, you will need to assign the correct agent within EaseCentral. A team in EaseCentral will be created with the name of the EaseCentral user that transferred the quote, i.e. "EBIX HealthConnect: John Smith."

Enrollment Export from the Main Menu

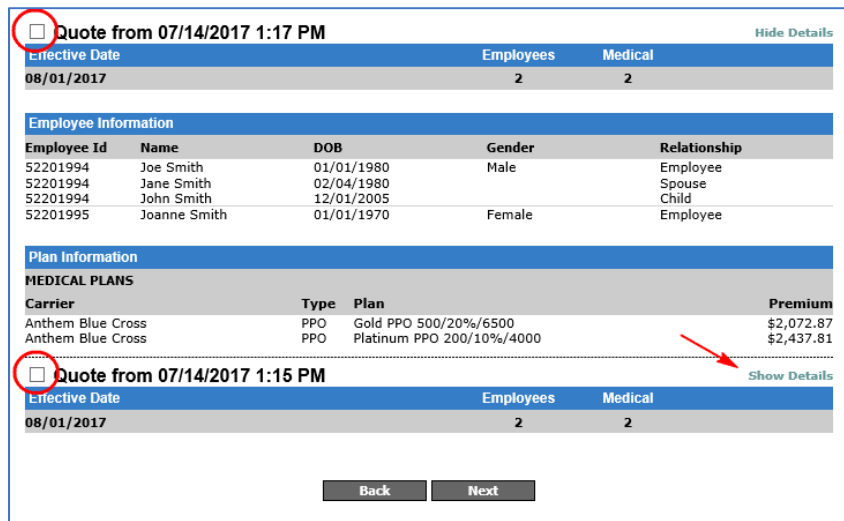
- After logging in, click "Enrollment Export" on the menu.



- Use the drop down to select the group you'd like to export from bpQuote to EaseCentral.



- After selecting a group, you will see any previous exports listed. Click Next to continue. Check the box next to the quote you wish to export, click the "Show Details" button to view basic data if needed.



4. Check the boxes associated with the plans you would like to export and click next.

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Plan Information

MEDICAL PLANS

Carrier	Type	Plan	Premium
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Agent Email

This should be the email of the Agent the group will be associated with on the EaseCentral platform.

Email Address

Contribution Information

Do you wish to include employer contribution details?

Yes No

Medical Contribution Details

Type Base Plan

Percentage --Select--

Employee Dependent

100 0

Pay Cycle

Monthly

6. You'll arrive at a summary page to confirm everything is correct before validating your EaseCentral account.

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Agent Information

Agent Email

Group Information

Group Name	Effective Date
New Group to Export	08/01/2017

Address 94597 Phone Fax

SIC 7372 Employer Medical Contributions Employee 100% Dependent 0%

Employee Information

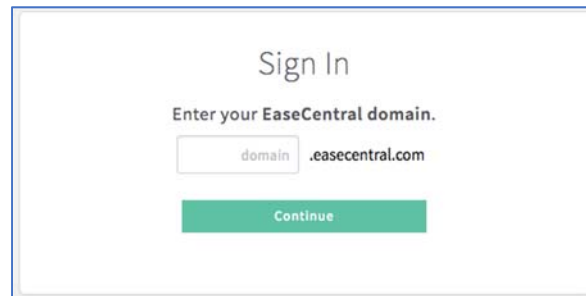
Employee Id	Name	DOB	Gender	Relationship
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52201995	Joanne Smith	01/01/1970	Female	Employee

Plan Information

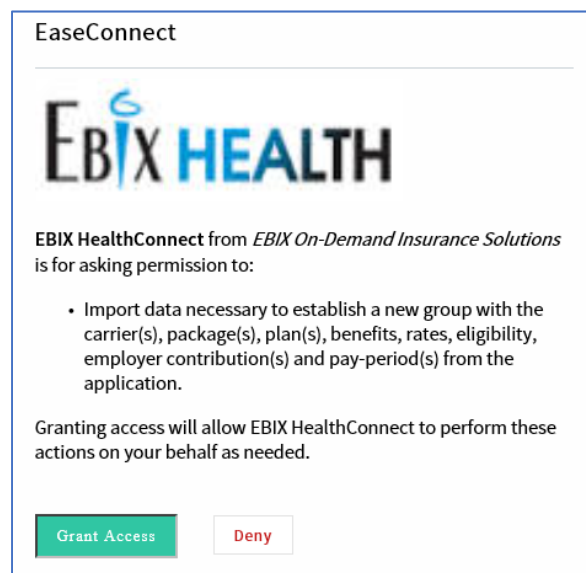
MEDICAL PLANS

Carrier	Type	Plan	Premium
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7. After submitting, you will be taken to the EaseCentral validation where you will need to enter in your domain that precedes the “.easecentral.com”.



8. Then use your standard EaseCentral login credentials to complete the validation. EaseCentral will ask you to “Grant Access” for Ebix to create the new group in EaseCentral with exported date.



9. Your quote data will transfer over to EaseCentral and you will be taken back to bpQuote. Your exported quote will be under the Agent’s account associated with the email address entered during the export process. If you left the email address blank, you will need to assign the correct agent within EaseCentral. A team in EaseCentral will be created with the name of the EaseCentral user that transferred the quote, i.e. “EBIX HealthConnect: John Smith.”

Notes:

- Use the quote export for groups new to EaseCentral, whether renewing or enrolling in a new plan
- For renewing groups, consider quoting the group for the previous year and exporting data, then use the [Open Enrollment Best Practices](#) and the Beere&Purves Rate Library to create this year’s plans
- Confirm plans names correctly map onto selected applications, change if necessary
- For groups already on EaseCentral, use the [Open Enrollment Best Practices](#) the Beere&Purves Rate Library
 - o The Enrollment Export can be used to transfer over new plan data but be sure to use the same company name in EaseCentral and the same census so there is no duplication