

Proposal Options for JG Test 1

Group Information [Edit Group/Census Info](#)

☐ Cover Page

☒ Include Broker Detail

Producer

☐ Census

☐ Census Including Dependents

Medical Plans Selection and Display

Display Medical Plans

☐ Page By Carrier

☐ Page By Plan Type

☐ Include Employer Contributions

Override Sort Order 

Select Order

Select Medical Plans for Quoting [Excluded Plans](#)

Double click a plan name to move from one box to the next. To move multiple plans at once: While depressing the control key, highlight each plan by clicking on it once, then use the Include and Exclude buttons to move plans to the desired box. You can then sort the plans in preferred order by highlighting a plan and using the Up or Down buttons to move it.

Exclude from Proposal

▼ Include ▼

▲ Exclude ▲

Include in Proposal

BC Platinum PPO 15/250/10% SSYC  
BC Platinum PPO 20/10% SSVU  
BC Platinum PPO 5/250/15% SSRH  
BC Platinum PPO 5/250/15% WH SSZF  
BC Platinum Select PPO 15/10% SSV0  
BC Platinum Select PPO 15/250/10% SSYG  
BC Platinum Select PPO 20/10% SSVQ  
BC Platinum Select PPO 5/250/15% SSRM  
Kaiser Platinum 90 PPO 0/15 + Child Dental  
UHC Core Platinum 15/10% (CE-MP)  
UHC Core Platinum 15/250/20% (CE-MQ)  
UHC Core Platinum Primary Advantage 250/20% (CE-MR)

First

Up

Down

Last

Set

The following reports are based on the plans selected above.

Selected Medical Plans Reports

☐ Plan Grid

☐ Side by Side

☐ Side by Side Detail

☐ EE Rate Side by Side

☐ Single Plan Detail

☐ Employee Rate Detail

☐ Member Rate Detail

☐ Full Benefits

☐ Underwriting Guidelines

☐ Rider Report

☐ Portfolio Grid

☐ Include Current Plan

4 Per Page ▼

☐ Benefits Only

☐ Benefits Only

☐ Add Full Benefits

☐ Include Current Plan

4 Per Page ▼

☐ Sort by Current/Renewal

☐ Include Current Plan

1 Per Page ▼

General Plan Reports

☐ Current/Renewal 

Summary ▼

☐ Cost Comparison 

click for options

☐ Employee Worksheet ACA 

click for options

☐ Pre ACA Employee Worksheet 

click for options

☐ Table Rates ACA

click for options

Multi / Dual Option

☐ Multi Option

☐ Final Rates for Multi Option

☐ Dual Option 

click for options

Dental Reports

☐ Dental Side by Side

☐ Dental Plan Listing

☐ Dental Cost Comparison

☐ Dental Employee Worksheet

☐ Underwriting Guidelines

☐ Benefits Only

☐ Include Dental Table Rates

click for options

click for options

Ancillary Reports

☐ Group Life Proposal 

click for options

☐ Group Vision Proposal 

click for options

☐ Vision Worksheet

click for options

Personal Protection Plan (P3)

☐ Personal Protection Plan

☐ Include P3 U/W Guidelines

Printing Options

☐ Include Page Numbers

Settings

Save Settings

Proposal Order

Hide Low Usage

BP Quote

Enrollment Export

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

Enrollment Export

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.

We are excited to announce that we have added a new multi-tab excel report.

Reports marked with the icon are currently available to use with this new report. We will add this icon to additional reports as they become available. Please note that the other reports can be exported to Excel using the Convert to XLS button but only one report can be selected at a time.

Proposal Format

Back

Preview

Convert to XLS

Create Proposal

Excel Export (beta)