Generating Multi-Option Reports in bpQuote

Recent enhancements have been made to the Multi-Option feature in bpQuote. Previously, you had the ability to illustrate Current/Renewal plans alongside (up to) three alternative scenarios in the Multi-Option report. With the recent enhancements, you will be able to **show Current/Renewal plans alongside (up to) nine alternative scenarios**.

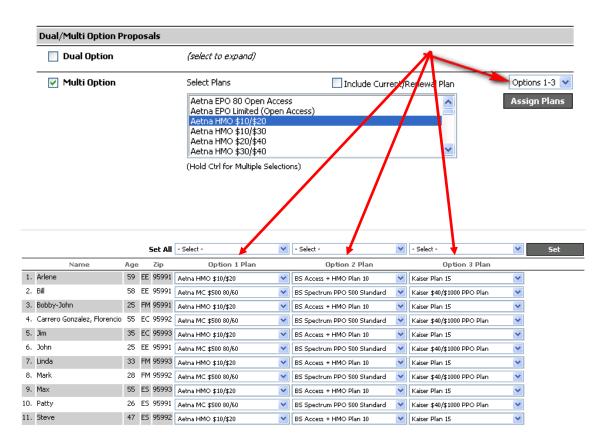
A small learning curve does accompany the increased flexibility so we have provided instructions when generating more than three alternative scenarios in the Multi-Option report.

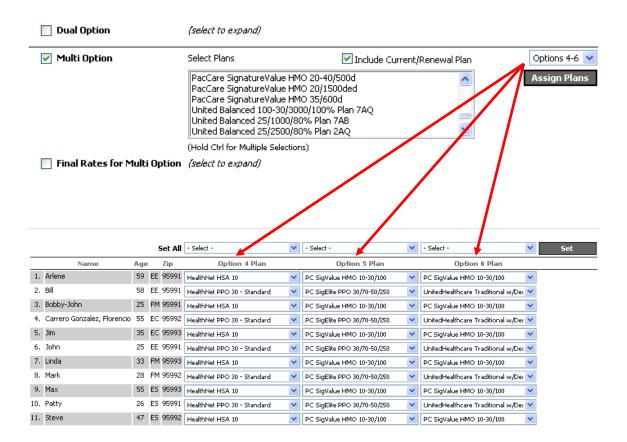
Instructions:

- 1. Check the "Include Current/Renewal Plan" check box if you want the plans entered to automatically show in the report.
- 2. Use the Ctrl key to manually select the medical plans that you want to include in columns 1, 2 & 3.
- 3. Click on the "Assign Plans" button and make the plan selection for each EE across columns 1, 2 & 3.
- 4. Return to the Proposal Options Page and change the drop-down list showing "Options 1-3" to "Options 4-6".
- 5. Use the Ctrl key to manually select the medical plans that you want to include in columns 4, 5 & 6.
- 6. Click on the "Assign Plans" button and make the plan selection for each EE across columns 4, 5 & 6.
- 7. If you need more scenarios, return to the Proposal Options Page and change the drop-down list showing "Options 4-6" to "Options 7-9".
- 8. Use the Ctrl key to manually select the medical plans that you want to include in columns 7, 8 & 9.
- 9. Click on the "Assign Plans" button and make the plan selection for each EE across columns 7, 8 & 9.
- 10. Return to the Proposal Options Page and click on "Create Proposal" to generate the Multi-Option report.

Along with this enhancement, **HealthConnect has also altered the Final Rates for Multi-Option report**. Users will note that the drop-down list now includes Option 4 though Option 9 in addition to Option 1 through Option 3. When the ER chooses to base their contribution on a base plan, bpQuote provides the User with two options: choose the base plan from All Plans within the system; or choose the base plan from the plans selected in the column being used to generate the Final Rates.

Screen shots of the enhancements are provided below. Please contact a member of your dedicated b&p Sales Team at 888,722,3373 for assistance.





The override ER Contribution option changed as well. Users can select the base plan from only the plans previously selected for the "sold" column or they can choose the base plan from all plans in the system.

