

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.

Dual/Multi Option Proposals

☐ Dual Option (select to expand)

☒ Multi Option

Select Plans

☐ Include Current/Renewal Plan

Options 1-3

Assign Plans

(Hold Ctrl for Multiple Selections)

Set All - Select - - Select - - Select - Set

Name	Age	EE	Zip	Option 1 Plan	Option 2 Plan	Option 3 Plan
1. Arlene	59	EE	95991	Aetna HMO \$10/\$20	BS Access + HMO Plan 10	Kaiser Plan 15
2. Bill	58	EE	95991	Aetna MC \$500 80/60	BS Spectrum PPO 500 Standard	Kaiser \$40/\$1000 PPO Plan
3. Bobby-John	25	FM	95991	Aetna HMO \$10/\$20	BS Access + HMO Plan 10	Kaiser Plan 15
4. Carrero Gonzalez, Florencio	55	EC	95992	Aetna MC \$500 80/60	BS Spectrum PPO 500 Standard	Kaiser \$40/\$1000 PPO Plan
5. Jim	35	EC	95993	Aetna HMO \$10/\$20	BS Access + HMO Plan 10	Kaiser Plan 15
6. John	25	EE	95991	Aetna MC \$500 80/60	BS Spectrum PPO 500 Standard	Kaiser \$40/\$1000 PPO Plan
7. Linda	33	FM	95993	Aetna HMO \$10/\$20	BS Access + HMO Plan 10	Kaiser Plan 15
8. Mark	28	FM	95992	Aetna MC \$500 80/60	BS Spectrum PPO 500 Standard	Kaiser \$40/\$1000 PPO Plan
9. Max	55	ES	95993	Aetna HMO \$10/\$20	BS Access + HMO Plan 10	Kaiser Plan 15
10. Patty	26	ES	95991	Aetna MC \$500 80/60	BS Spectrum PPO 500 Standard	Kaiser \$40/\$1000 PPO Plan
11. Steve	47	ES	95992	Aetna HMO \$10/\$20	BS Access + HMO Plan 10	Kaiser Plan 15

☐ **Dual Option** *(select to expand)*

☒ **Multi Option**

Select Plans ☒ Include Current/Renewal Plan Options 4-6 **Assign Plans**

PacCare SignatureValue HMO 20-40/500d
PacCare SignatureValue HMO 20/1500ded
PacCare SignatureValue HMO 35/600d
United Balanced 100-30/3000/100% Plan 7AQ
United Balanced 25/1000/80% Plan 7AB
United Balanced 25/2500/80% Plan 2AQ

(Hold Ctrl for Multiple Selections)

☐ **Final Rates for Multi Option** *(select to expand)*

Set All - Select - - Select - - Select - Set

Name	Age	Zip	Option 4 Plan	Option 5 Plan	Option 6 Plan
1. Arlene	59	EE 95991	HealthNet HSA 10	PC SigValue HMO 10-30/100	PC SigValue HMO 10-30/100
2. Bill	58	EE 95991	HealthNet PPO 30 - Standard	PC SigElite PPO 30/70-50/250	UnitedHealthcare Traditional w/Dec
3. Bobby-John	25	FM 95991	HealthNet HSA 10	PC SigValue HMO 10-30/100	PC SigValue HMO 10-30/100
4. Carrero Gonzalez, Florencio	55	EC 95992	HealthNet PPO 30 - Standard	PC SigElite PPO 30/70-50/250	UnitedHealthcare Traditional w/Dec
5. Jim	35	EC 95993	HealthNet HSA 10	PC SigValue HMO 10-30/100	PC SigValue HMO 10-30/100
6. John	25	EE 95991	HealthNet PPO 30 - Standard	PC SigElite PPO 30/70-50/250	UnitedHealthcare Traditional w/Dec
7. Linda	33	FM 95993	HealthNet HSA 10	PC SigValue HMO 10-30/100	PC SigValue HMO 10-30/100
8. Mark	28	FM 95992	HealthNet PPO 30 - Standard	PC SigElite PPO 30/70-50/250	UnitedHealthcare Traditional w/Dec
9. Max	55	ES 95993	HealthNet HSA 10	PC SigValue HMO 10-30/100	PC SigValue HMO 10-30/100
10. Patty	26	E5 95991	HealthNet PPO 30 - Standard	PC SigElite PPO 30/70-50/250	UnitedHealthcare Traditional w/Dec
11. Steve	47	E5 95992	HealthNet HSA 10	PC SigValue HMO 10-30/100	PC SigValue HMO 10-30/100

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.

Dual/Multi Option Proposals

☐ **Dual Option** *(select to expand)*

☒ **Multi Option**

Select Plans ☐ Include Current/Renewal Plan Options 1-3 **Assign Plans**

Aetna HMO Deductible \$1000
Aetna HMO HRA \$1500/\$40
Aetna HMO HRA \$750/\$25
Aetna Indemnity
Aetna MC \$1000 70/50
Aetna MC \$1000 80/50/50

(Hold Ctrl for Multiple Selections)

☒ **Final Rates for Multi Option** Select Option: Option 2

☒ Override ER Contribution with Percentage of Selected Plan ☐ Rollover Balance to Dep

☒ Selected Plans in Package ☐ All Plans

Blue Shield Access + HMO Plan 10 EE % 0 Dep % 0
Blue Shield Access + HMO Plan 10
Blue Shield Spectrum PPO 500 Standard

Think HR Information

Dual/Multi Option Proposals

☐ Dual Option *(select to expand)*

☒ Multi Option

Select Plans

☐ Include Current/Renewal Plan

Options 1-3 ▼

Assign Plans

Aetna HMO \$20/\$40
Aetna HMO \$30/\$40
Aetna HMO Deductible \$1000
Aetna HMO HRA \$1500/\$40
Aetna HMO HRA \$750/\$25
Aetna Indemnity

(Hold Ctrl for Multiple Selections)

☒ Final Rates for Multi Option

Select Option: Option 2 ▼

☒ Override ER Contribution with Percentage of Selected Plan

☐ Rollover Balance to Dep

☐ Selected Plans in Package ☒ All Plans

Blue Shield Access + HMO Plan 10 ▼

EE % 0 Dep % 0

Think HR Information

☐ Company Overview [view](#)

Life and Vision Plan Information

☐ Group Life Proposal

☐ Group Vision Proposal

Printing Options

☐ Use Letterhead

☐ Include Page Numbers

Anthem Blue Cross Premier PPO \$20 Co-Pay
Anthem Blue Cross Saver HMO
Anthem Blue Cross Saver PPO
Anthem Blue Cross Solutions 2500 PPO
Anthem Blue Cross Solutions 3500 PPO
Anthem Blue Cross Solutions 5000 PPO
Blue Shield Access + HMO Plan 10
Blue Shield Access + HMO Plan 15
Blue Shield Access + HMO Plan 20
Blue Shield Access + HMO Plan 20 Value
Blue Shield Access + HMO Plan 25
Blue Shield Access + HMO Plan 30
Blue Shield Access + HMO Plan 40
Blue Shield Access + HMO Plan 5
Blue Shield Access+ HMO Plan 25
Blue Shield Added Advantage POS Plan
Blue Shield PPO Active Choice 500
Blue Shield PPO Active Choice 750
Blue Shield Spectrum PPO 500 Standard
Blue Shield Spectrum PPO 1000 Value
Blue Shield Spectrum PPO 1500 Value
Blue Shield Spectrum PPO 250 Premier
Blue Shield Spectrum PPO 250 Standard
Blue Shield Spectrum PPO 500 Value
Blue Shield Spectrum PPO 750 Value
Blue Shield Spectrum PPO Plan 1000
Blue Shield Spectrum PPO Plan 3000
Blue Shield Spectrum PPO Plan 500
Blue Shield Spectrum PPO Plan 500 Premier
Blue Shield Spectrum PPO Savings Plan 1800/3600

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