Broker Quoting Tool
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This guide shows Broker staff and General Agencies how to create quotes for existing and prospective clients.

Creating a Quote for a Current Client or Prospect (Brokers)

Step 1. Go to dchealthlink.com.

Step 2. From the BROKERS menu at the top of the homepage, select ‘Login’.
Step 3. Enter your login information.

![Sign In]

Step 4. Select ‘Employers’ from the blue menu bar at the top of the webpage to see all employer groups assigned to you.

![Employers]

**IMPORTANT:** Use the toggle buttons to sort your employer groups.

- **All** shows all *active, inactive and prospective* employers of the Broker.
- **Active** shows all employers *currently* assigned to the Broker.
• **Inactive** shows all employers who were *formerly* assigned to the Broker.

• **Prospects** shows potential employers quoted by the Broker who don’t have an account.

**Step 5.** Find the group that you’d like to quote from the list. In the ‘Actions’ tab, select ‘Create Quote’ to generate a new quote, or ‘View Quotes’ to see existing quotes.
You can also select ‘Add Prospect Employer’ to generate quotes for employers who haven’t created an employer account.

**Step 6.** Create a quote name and coverage start date.
Step 7. Update the employee roster as needed. There are two ways to add and remove employees described below. Once you’re finished, choose SELECT HEALTH BENEFITS.

- You can add and remove employees one at a time. Under ‘Employee Roster’, select ‘Add Employee’ to add a new employee or ‘Cancel’ to remove an employee.

**IMPORTANT:** Add dependents one at a time. Select ‘Update employee’ after you add each.

- You can add and remove employees by uploading an updated roster spreadsheet. Select ‘Download Employee Roster’. Save the spreadsheet to your desktop and make your changes. Once you’re finished, upload the spreadsheet to the quote by selecting ‘Upload Employee Roster’.

**IMPORTANT:** Do not copy and paste into the spreadsheet.
Step 8. Choose a benefit model. Slide the blue buttons next to each enrollee type to set the employer’s contribution amount.
Step 9. Under ‘Benefit Package Selection’, use the INCLUDE IN COMPARISON checkbox below the plan name to choose up to 3 plans to compare. Select the radio button next to the reference plan. Select COMPARE PLANS.
Step 10. Use the ‘Health Plan Information’ section to review employer and employee costs.

![Health Plan Information](image)

**Employee Costs**

Details of the minimum, maximum and reference costs for your members are shown below. Values are based on the Benefit Package Type, Contribution Amounts and Reference Plan you have chosen above.

<table>
<thead>
<tr>
<th>Employee</th>
<th>Dependent Count</th>
<th>Reference Plan</th>
</tr>
</thead>
<tbody>
<tr>
<td>Bruce</td>
<td>1</td>
<td>$1,293.91</td>
</tr>
</tbody>
</table>

Step 11. To add a dental quote, select ‘Dental Benefits’. To complete your quote, select REVIEW QUOTE. Then select PUBLISH QUOTE. Once you publish your quote, you can’t make any edits to the quote. To save a quote that you’d like to edit or publish later, select SAVE QUOTE. To use a quote for future quoting purposes, select COPY QUOTE.

![Quote Management](image)
Step 12. To view all available quotes for the group, select RETURN TO QUOTE MANAGEMENT.
**Step 13.** Once you publish a quote, you’ll receive an 8-digit number (Claim Code XXXX-XXXX). Give this code to the employer so that they can claim the published quote.
Employer Quote Claiming

Step 1. Have the employer login to their account and select ‘Benefits’ from the navigation bar. Select ‘Claim Quote’, enter the 8-digit claim code, and select CLAIM CODE.
**Step 2.** A message displays at the top of the account saying “Code claimed with success. Your Plan Year has been created.” If the employer wants to make edits, select ‘Edit Plan Year’. When the employer is ready to publish their benefit package, select ‘Publish Plan Year’.
Step 3. A message displays at the top of the webpage that says ‘Plan Year successfully published’.
Creating a Quote for a Current Client (General Agency)

Step 1. Go to dchealthlink.com.

Step 2. From the BROKERS menu at the top of the homepage, select ‘Login’.

Step 3. Enter your login information.
Step 4. select ‘Employers’ from the blue menu bar at the top of the page to see all employer groups assigned to your General Agency by Brokers.

**IMPORTANT:** Use the toggle buttons to sort your employer groups.

- **All** shows all active, inactive and prospective employers related to the Broker.
- **Active** shows all employers assigned to the Broker who are enrolling or enrolled.
- **Inactive** shows all employers assigned to the Broker who are terminated.
- **Prospects** shows potential employers quoted by the Broker who don’t have an account.
Step 5. Find the group that you’d like to quote from the list. In the ‘Actions’ tab, select ‘View Quotes’ to view existing quotes, or ‘Create Quote’ to generate a new quote.

![Image of Broker Quoting Tool](image)

Step 6. Choose a quote name and coverage start date.

![Image of Broker Quoting Tool](image)

Step 7. Update the employee roster as needed. There are two ways to add and remove employees described below. Once you’re finished, choose SELECT HEALTH BENEFITS.
- You can add and remove employees one at a time. Under ‘Employee Roster’, select ‘Add Employee’ to add a new employee or ‘Cancel’ to remove an employee.

**IMPORTANT:** Add dependents one at a time. Select ‘Update employee’ after you add each.

- You can add and remove employees by uploading an updated roster spreadsheet. Select ‘Download Employee Roster’. Save the spreadsheet to your desktop and make your changes. Once you’re finished, upload the spreadsheet to the quote by selecting ‘Upload Employee Roster’.

**IMPORTANT:** Do not copy and paste into the spreadsheet.
Employee record created successfully.

Quote for Sunny Day Deli

Quote Name: Plan Design 2019  
July 2019  

ZIP Code: 20001

Employee Roster

Use the detailed roster below to specify the enrollees for this business. The details below are from this Employer's current roster. You can upload a new roster for this quote if required.

Important: When using this quoting tool for employers that currently offer coverage through DC Health Link it is important to know that the current employee roster may not reflect the current enrollments for the group. Any changes to enrollment information that has been made through an employee account may not be reflected on the employee roster. Please review the employee roster for accuracy prior to using this quoting tool for a more accurate estimate for your group.

<table>
<thead>
<tr>
<th>Employee Name</th>
<th>DOB</th>
<th>Hired On</th>
<th>Status</th>
<th>Est Participation</th>
<th>No. of Dependents</th>
</tr>
</thead>
<tbody>
<tr>
<td>Joe Baker</td>
<td>06/04/1972</td>
<td>2018-10-04</td>
<td>Eligible</td>
<td>Enroll</td>
<td>0</td>
</tr>
<tr>
<td>Hawk Eye</td>
<td>02/09/1987</td>
<td>2018-07-15</td>
<td>Eligible</td>
<td>Enroll</td>
<td>0</td>
</tr>
</tbody>
</table>

Showing 1 to 2 of 2 entries

per page
Step 8. Choose a benefit model. Slide the blue buttons next to each enrollee type to set the employer’s contribution amount.
Step 9. Under ‘Benefit Package Selection’, use the INCLUDE IN COMPARISON checkbox below the plan name to choose up to 3 plans to compare. Select the radio button next to the reference plan. Select COMPARE PLANS.
Step 10. Use the ‘Health Plan Information’ section to review employer and employee costs.
### Plan Comparison Chart

#### Plans

<table>
<thead>
<tr>
<th>Provider Network</th>
<th>BluePreferred PPO Gold 1000</th>
<th>BlueChoice Advantage Silver 5000</th>
<th>HealthyBlue Advantage Platinum 5000</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>PLAN BENEFITS</strong></td>
<td><strong>Gold • PPO</strong></td>
<td><strong>Silver • POS</strong></td>
<td><strong>Platinum • POS</strong></td>
</tr>
<tr>
<td>(In Network)</td>
<td>Nationwide</td>
<td>Nationwide</td>
<td>Nationwide</td>
</tr>
<tr>
<td>Primary Care Visit to Treat an Injury or Illness</td>
<td>$15.00, Not Applicable, No Charge, Not Applicable</td>
<td>$50.00, Not Applicable, Not Applicable, No Charge</td>
<td>$50.00, Not Applicable, Not Applicable, Not Applicable</td>
</tr>
<tr>
<td>Urgent Care Centers or Facilities</td>
<td>$50.00, Not Applicable</td>
<td>$50.00, Not Applicable</td>
<td>$50.00, Not Applicable</td>
</tr>
<tr>
<td>Specialist Visit</td>
<td>$30.00, Not Applicable</td>
<td>$50.00, Not Applicable</td>
<td>$30.00, Not Applicable</td>
</tr>
<tr>
<td>Emergency Room Services</td>
<td>$250.00 Copay after deductible, Not Applicable</td>
<td>$250.00 Copay after deductible, Not Applicable</td>
<td>$200.00, Not Applicable</td>
</tr>
<tr>
<td>Inpatient Hospital Services (e.g., Hospital Stay)</td>
<td>$400.00 Copay per Stay after deductible, Not Applicable</td>
<td>$500.00 Copay per Stay after deductible, Not Applicable</td>
<td>$500.00 Copay per Stay after deductible, Not Applicable</td>
</tr>
<tr>
<td>Laboratory Outpatient and Professional Services</td>
<td>$15.00, Not Applicable</td>
<td>$25.00, Not Applicable</td>
<td>$25.00, Not Applicable</td>
</tr>
<tr>
<td>X-rays and Diagnostic Imaging</td>
<td>$30.00, Not Applicable</td>
<td>$50.00, Not Applicable</td>
<td>$50.00, Not Applicable</td>
</tr>
<tr>
<td>Generic Drugs</td>
<td>$10.00, Not Applicable</td>
<td>$10.00, Not Applicable</td>
<td>$10.00, Not Applicable</td>
</tr>
<tr>
<td>Preferred Brand Drugs</td>
<td>$45.00 Copay after deductible, Not Applicable</td>
<td>$40.00 Copay after deductible, Not Applicable</td>
<td>$45.00, Not Applicable</td>
</tr>
<tr>
<td>Non-Preferred Brand Drugs</td>
<td>$65.00 Copay after deductible, Not Applicable</td>
<td>$70.00 Copay after deductible, Not Applicable</td>
<td>$65.00, Not Applicable</td>
</tr>
<tr>
<td>Specialty Drugs</td>
<td>Not Applicable, 50.0% Coinsurance after deductible</td>
<td>$150.00 Copay after deductible, Not Applicable</td>
<td>$150.00, Not Applicable</td>
</tr>
</tbody>
</table>

**Summary of Benefits and Coverage**
**Step 11.** To add a dental quote, select ‘Dental Benefits’. To complete your quote, select REVIEW QUOTE. Then select PUBLISH QUOTE. Once you publish your quote, you can’t make any edits to the quote. To save a quote that you’d like to edit or publish later, select SAVE QUOTE. To use a quote for future quoting purposes, select COPY QUOTE.

**Step 12.** To view all available quotes for the specific group you’re working with, select RETURN TO QUOTE MANAGEMENT.
**Step 13.** Once you publish a quote, you’ll receive an 8-digit number (Claim Code XXXX-XXXX). Give this code to the Employer so that they can claim the published quote.
Contact and Additional Information

Still have questions? Call DC Health Link at (855) 532-5465.

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