



# OneSource: How to complete an existing business quote

1. Login to the OneSource Dashboard. Enter the customer ID in the search bar. Click “Search.”

WELCOME TO BLUE CROSS BLUE SHIELD OF MICHIGAN MANAGING AGENT COMMUNITY!

Dashboard MY DASHBOARD  
As of May 19, 2021, 9:34 AM Viewing as Julie O'Neill

Accounts Report

Record Count: 9.5k

Account Status: Active

View Report (Accounts Report)

Agent Support Requests Report

Record Count: 152

Status: In Progress

View Report (Agent Support Requests Report - open)

ACTIONS:

- Launch New Business Quote
- Launch New Support Request

What do you want to do today?

- Quote New Business
- Enroll an Account
- Quote Existing Business
- Group Wide Change
- Group Maintenance

I'll use Instant Guidance later.

2. Select the type of quoting needed.

How can we help you?

? Help Things to do

Type in your question...

Agent Resources

New Business

Existing Business

- Help Me Quote Existing Business
- Help me with a GWC
- Help me with a Maintenance Change

Find My Renewal Package

Open the Underwriting Rules

Online Submission Checklist

powered by uak



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3. Click “Alternate Quote.”

The screenshot shows the Nexben OneSource account page. At the top, there is a search bar and a navigation menu with links: HOME, MY ACCOUNTS, MY QUOTES, SUPPORT REQUEST, RENEWAL CONTRACTS, and REPORTS. Below the navigation menu, there is an account summary section with fields for Account Record Type, Account Phone, Mailing Address, Retention Sales Representative, and Servicing Agent. In the ACTIONS section, the 'Click Alternate Quote' button is highlighted with a tooltip that says 'Click Alternate Quote' and 'By WalkMe'. Other buttons in the ACTIONS section include 'Create New Support Request' and 'Maintenance Changes'. Below the ACTIONS section, there are tabs for DETAILS, QUOTES, ENROLLMENTS, PACKAGE SUMMARY, and GROUP WIDE CHANGE. The DETAILS tab is selected, showing account information such as Account Name, Account Phone, Account Type, Retention Sales Representative, Assigned Managing Agency (ACTION BENEFITS COMPANY), and CID (287815).

4. Verify fields have been entered correctly. Click “Next.”

The screenshot shows the 'Launch Alternate Quote' form. At the top, there is a progress bar with a blue circle indicating the current step. The form contains several fields: 'Requested Effective Date' (Apr 1 2021), 'Renewal Month' (April 1st), 'Street' (12345678901234567890), 'City' (SAGINAW), 'State' (MI), 'ZIP Code' (48604), and 'County' (SAGINAW). At the bottom, there is a 'Next' button highlighted with a tooltip that says 'Click Next' and 'By WalkMe'. A 'Cancel' link is also visible on the left side of the form.



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5. If new employees need to be added or their status needs to be changed, click “Add Employee.” Review all membership and click “Next.”

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6. Select all relevant plans and complete all required fields. Click “Next.”



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7. To see alternate plan options, click “Next.”

Current Plan(s) New Plan(s) NEXT

If more than 3 plans are selected, use this button to scroll between them BACK NEXT

**Simply Blue™ PPO Silver \$4000**

**\$1,148/mo**

Deductible	\$4,000
Coinsurance	30%
Office Visit Copay	\$40
ER Copay	\$250
Rx Coverage	\$30/\$60/50%/20%/25%

☐ Compare

8. Use filters to narrow the results.  
Select plans to compare.

Use filters to narrow your results  
Make sure to click Apply Filters

BACK NEXT

Available Plans

BCN Healthy Blue Living™ HMO Gold \$1000  
**\$1,161/mo**

Deductible	\$1,000
Coinsurance	20%
Office Visit Copay	\$25
ER Copay	\$150
Rx Coverage	\$10/\$30/\$40/\$80/20%/20%

Select Plan

BCN Healthy Blue Living™ HMO Gold \$1500  
**\$1,141/mo**

Deductible	\$1,500
Coinsurance	20%
Office Visit Copay	\$25
ER Copay	\$150
Rx Coverage	\$4/\$25/\$50/\$80/20%/20%

Select Plan

BCN Healthy Blue Living™ HMO Gold \$2000  
**\$1,136/mo**

Deductible	\$2,000
Coinsurance	20%
Office Visit Copay	\$25
ER Copay	\$150
Rx Coverage	\$4/\$15/\$40/\$80/20%/20%

Select Plan

Wellness Plans

TGG Solutions is now Nexben. This strengthens our dedication to providing excellent customer service and business solutions. Nexben will remain a general agent for Blue Cross® Blue Shield® of Michigan and Blue Care Network, providing agents in Michigan with the tools and support needed to best serve your clients. Blue Cross Blue Shield of Michigan and Blue Care Network are nonprofit corporations and independent licensees of the Blue Cross and Blue Shield Association. 9.22.



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9. Group information is listed in the quote details. To compare products, click “Next.”

**Alternate Quote Summary**

Date Generated: 02/24/2021

**Quote Details**

Account Name: 2874, Twp 1 Pk B6  
 Agent Name: JEFFREY LITV  
 Managing Agent: JEFFREY LITV

Total Billable Members: 2  
 Expected Waiving: 0

**Current: Total Monthly Premium: \$1,112.96**

Product Name	Est. Prem	Members
Simply Blue™ PPO Silver \$4000	\$1,112.96	2
<b>Total</b>	<b>\$1,112.96</b>	<b>2</b>

**Alternate Quote: Estimated Total Monthly Premium: \$1,211.05**

Product Name	Est. Prem	Members
Simply Blue™ PPO Silver \$4000	\$1,148.21	2
<b>Total</b>	<b>\$1,148.21</b>	<b>2</b>

10. To compare the monthly premiums between the selected plans, click “Next.” The census rates will appear. Click “Next.”

**TOTAL MONTHLY PREMIUMS**

	Current	Alternate Quote	% Change
Medical	\$1,112.96	\$1,148.21	3%
Dental	\$0.00	\$53.85	N/A
Vision			N/A
<b>Total Monthly Premium</b>			<b>9%</b>

**Census with Rates**

Group Segment: 3177-1-0-7, 1E-01

First Name	Last Name	Date of Birth	Age	Relationship	Member Type	Medical	Rate	Dental	Rate	Vision	Rate
STUART	lastname	3/20/1971	50	Employee	Regular	Simply Blue™ PPO Silver \$4000	\$440.16	Blue Dental™ PPO SG 80/50/50 (50/50/50)	\$23.92	Blue Vision™ 24/24/24	\$4.46
MICHAEL	lastname	11/28/1958	62	Employee	Regular	Simply Blue™ PPO Silver \$4000	\$708.05	Blue Dental™ PPO SG 80/50/50 (50/50/50)	\$29.93	Blue Vision™ 24/24/24	\$4.53

\*We reserve the right to adjust rates if any of the assumptions or calculations used in the quoting process are incorrect. Final rates will be determined based on actual group enrollment and participation.  
 \*Plans and rates are not final until they have been approved by DIF and CMS.  
 \*Your agent is providing a Summary of Benefits and Coverage with this quote.  
 \*To comply with the Patient Protection and Affordable Care Act, groups may be required to make changes to their health insurance coverage. This may result in a change to the rates.



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11. Click “Lock quote and proceed.” There is an option to print a quick quote reference.

Name	First Name	Last Name	DOB	Age	Employee	Type	Plan	Rate	Blue Dental™ PPO SG	Blue Vision™	Rate
STUART	lastname	3/20/1971	50	Employee	Regular	Simply Blue™ PPO Silver \$4000	\$440.16	Blue Dental™ PPO SG 80/50/50 (50/50/50)	\$23.92	Blue Vision™ 24/24/24	\$4.46
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 \*Your agent is providing a Summary of Benefits and Coverage with this quote.  
 \*To comply with the Patient Protection and Affordable Care Act, groups may be required to make changes to their health insurance coverage. This may result in an adjustment to the rates.

Print Page

Lock Quote and Proceed

If you are ready to lock your rates and generate a proposal, click here. If not, Click Save for Later.

Lock Quote and Proceed

Previous

Save for later

Instant Guidance

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12. Select the available documents you would like. Enter your email address. Click on “Get Quote.”

Available Documents

☐ Cover Page

☐ Census with Rates

☐ Rate Grid

☐ Benefit Summaries

☐ Summary of Benefits and Coverage

Please enter email address(es)

Download Send Email

Go to Quote

Click Go to Quote to continue

For document generation, please adjust your pop-up blocker. For pop-up blocker instructions, click [here](#).

Instant Guidance

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