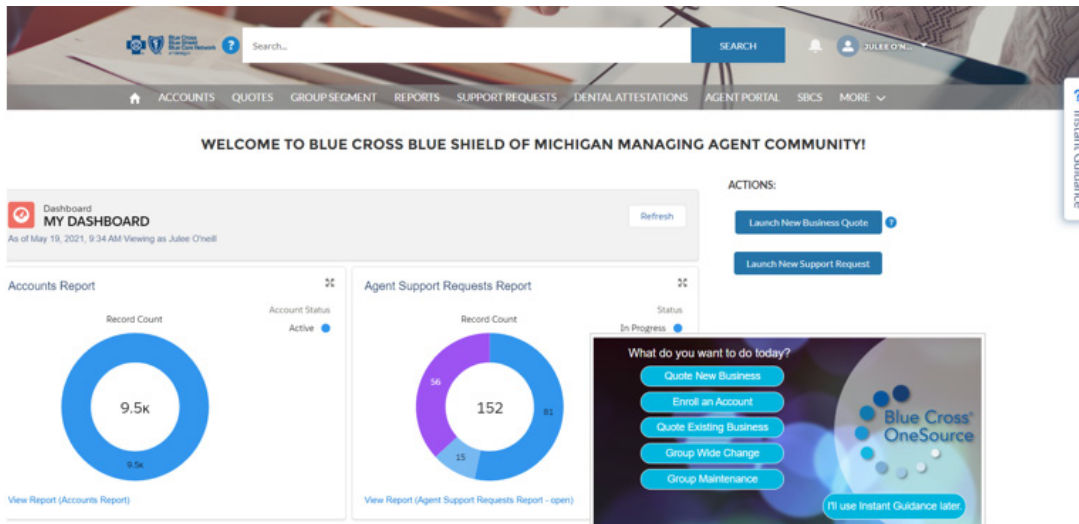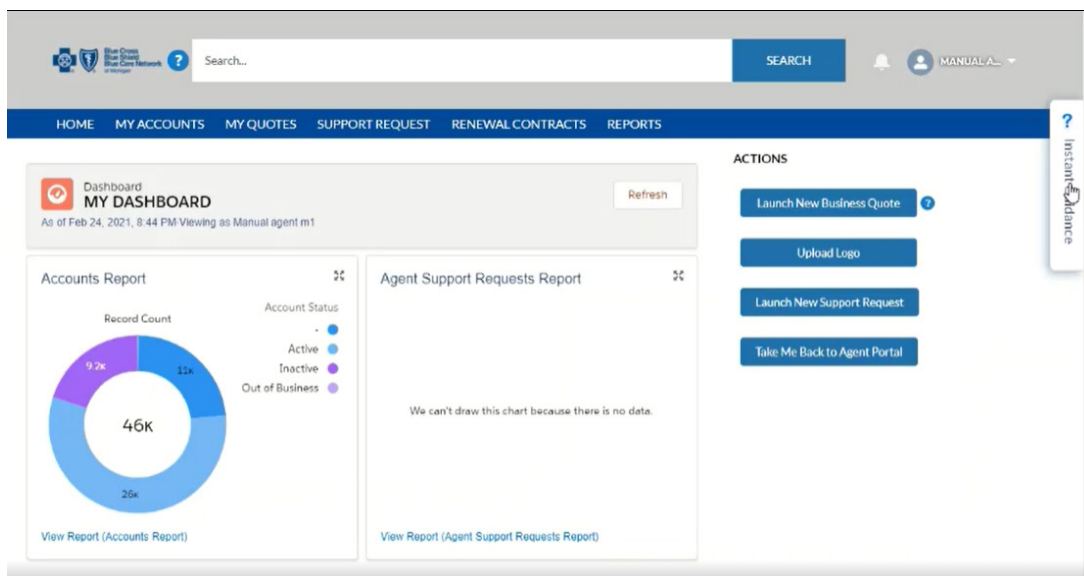# nexben™

Quoting new business in OneSource

1. Login to your OneSource (OS) dashboard.

2. Click on "Launch New Business Quote."

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Quoting new business in OneSource

3. Complete all required fields.

4. Click "Next" when done.

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5. Upload your spreadsheet census. Browse your computer for the prepared census. Double click on the file to load. Click "Next"

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6. Verify all information is correct, click "Next."

7. Begin selecting medical, dental and vision products.

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Quoting new business in OneSource

8. Answer applicable questions. Click "Next." Note, if quoting dental and vision, you must select the contribution type. Below 35 percent contribution is voluntary. If the contribution is more than 35 percent, it is non-voluntary.

9. Narrow the results by using filters. Select plans and click "Next" at the bottom of the page.

Quoting new business in OneSource

10. On the Member Level Designation page, select "No" to see the member rates on each plan quoted. Click "Next."

11. Quote details will appear. Click "Next."

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Quoting new business in OneSource

12. Quoted products will appear. Click "Next."

13. A box, "Census with Rates" will appear. Click "Next."

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Quoting new business in OneSource

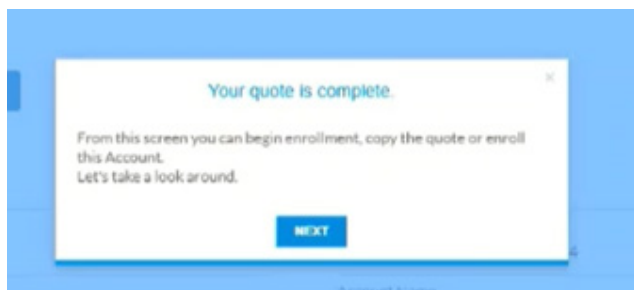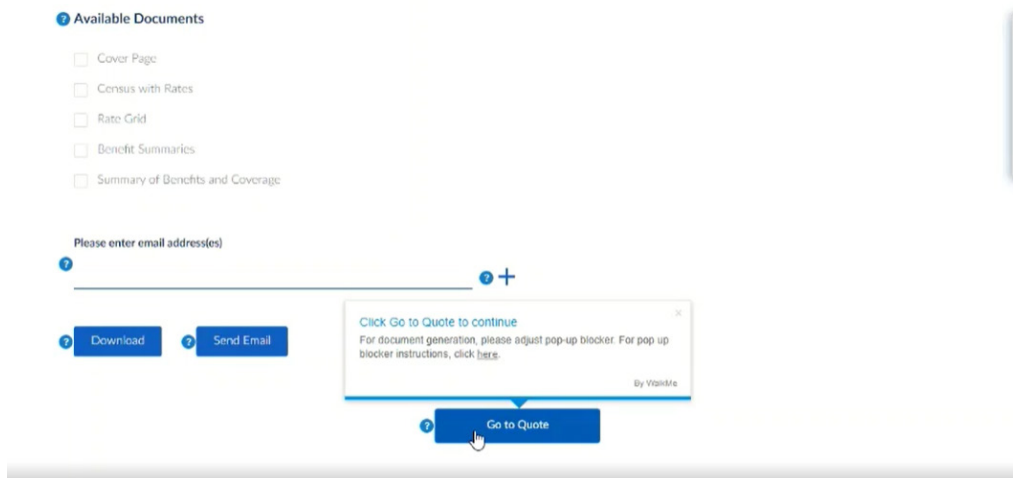14. You will have the option to print this page. Click "Lock Quote and Proceed."
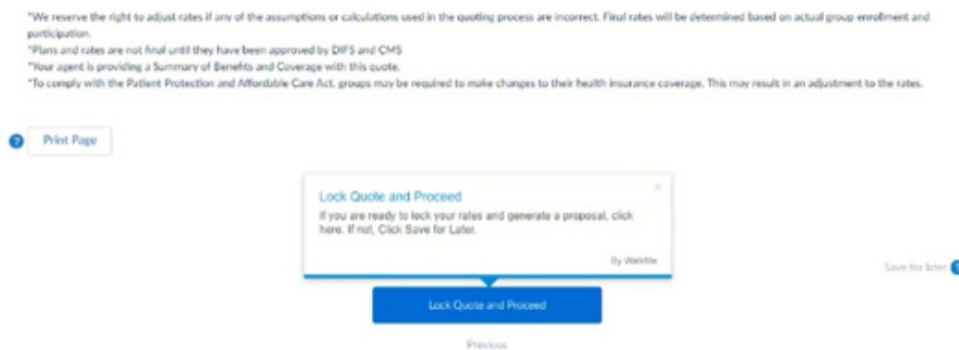
15. Select the documents to be included with the quote. Click "Next." Click "Go to Quote"

16. The quote is complete.