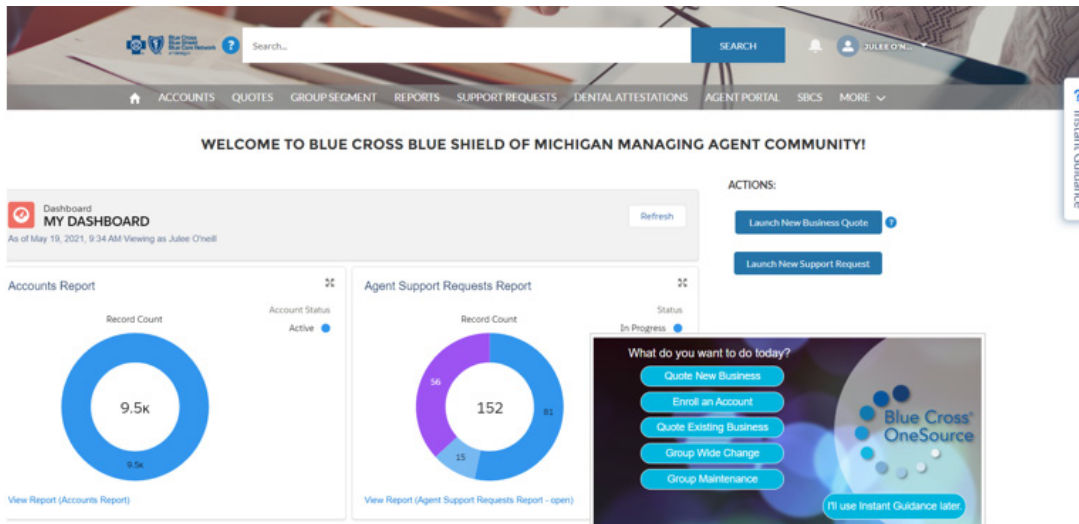


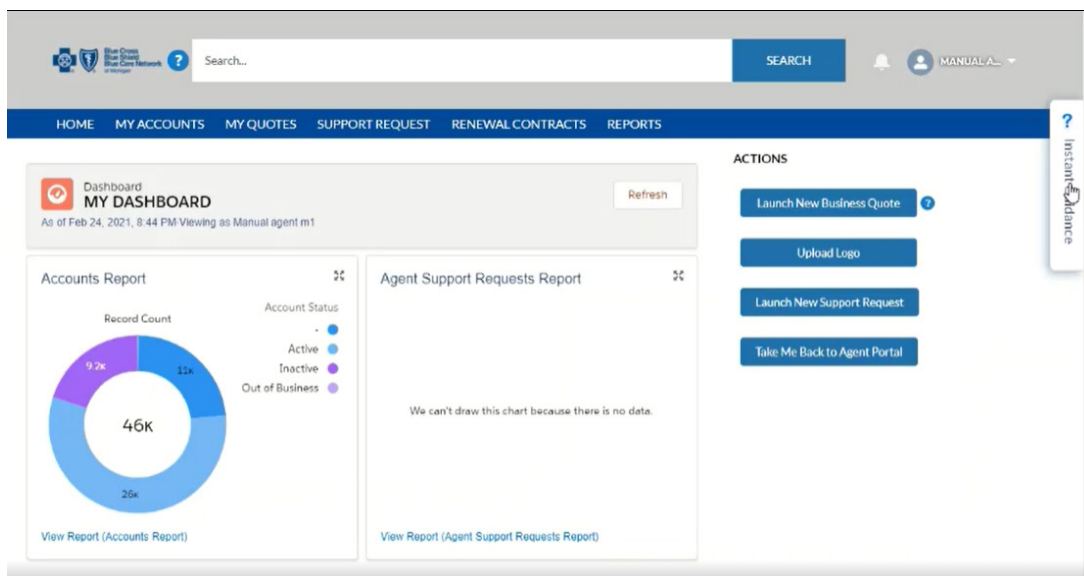


Quoting new business in OneSource

1. Login to your OneSource (OS) dashboard.



2. Click on “Launch New Business Quote.”





Quoting new business in OneSource

3. Complete all required fields.

The screenshot shows the 'Account Profile' form in the Nexben OneSource system. The form is titled 'Account Profile' and includes a progress bar at the top. A tooltip message says 'Complete the required fields below. Click Next when done. By WalkMe'. The form contains the following fields:

- Account Name *
- Headquarters ZIP Code *
- Headquarters County *
- Managing Agent *
- Requested Effective Date *

4. Click “Next” when done.

The screenshot shows the 'Account Profile' form in the Nexben OneSource system, now with the following fields filled out:

- Account Name *: GSD Group 24
- Headquarters ZIP Code *: 48348
- Headquarters County *: OAKLAND
- Managing Agent *: Action Benefits
- Requested Effective Date *: Apr 1 2021
- Requested Renewal Month *: April 1st
- Total FTE *: 3
- Expected Active Enrolling *: 3



Quoting new business in OneSource

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

The screenshot displays the Nexben OneSource web application interface. At the top, there is a navigation bar with a search bar and a user profile dropdown labeled 'MANUALA...'. Below the navigation bar, a progress bar shows the current step as 'Census'. The main content area is titled 'Prepare Your Census' and contains four buttons: 'Download Census Template', 'Upload Census', 'Add Employee', and 'Delete Census'. A tooltip提示 'Click Upload Census or Add Employee' is shown. A file explorer window is open, displaying the 'Documents' folder. The file explorer shows a list of files and folders, including 'Desktop', 'Downloads', 'Documents', 'Pictures', 'Google Drive', 'job aid', 'Quotes and Prop', 'Sample videos', 'Vlocity', 'OneDrive', 'This PC', '3D Objects', 'Desktop', and 'Documents'. The 'Documents' folder is selected, and the file name field is empty. The 'Open' button is highlighted. A 'Next' button is visible at the bottom of the interface.



Quoting new business in OneSource

6. Verify all information is correct, click “Next.”

Prepare Your Census

[Download Census Template](#)
[Upload Census](#)
[Add Employee](#)
[Delete Census](#)

	Last Name	First Name	Gender	Birth Date*	Age	Relationship*	Member Type*	Status*		Delete
1	Mitchell	Ron	Male	11/11/1985	35	Employee	Regular	Enrolling	Add Dependent	
	Mitchell	Alison	Female	12/19/1989	31	Spouse	Regular	Enrolling		
	Mitchell	Dustin	Male	3/11/2018	3	Child	Regular	Enrolling		
2	Austin	Jane	Female	11/11/1975	45	Employee	Regular	Enrolling	Add Dependent	
	Austin	Christine	Female	11/11/2016	4	Child	Regular	Enrolling		
3	Knoll	Melissa	Female	11/11/1988	32	Employee	Regular	Enrolling	Add Dependent	

[Cancel](#)
[Next](#)
[Click Next](#)
[Save for later](#)

Previous

7. Begin selecting medical, dental and vision products.

[SEARCH](#)
[MANUAL...](#)

[HOME](#)
[MY ACCOUNTS](#)
[MY QUOTES](#)
[SUPPORT REQUEST](#)
[RENEWAL CONTRACTS](#)
[REPORTS](#)

[1](#)
[2](#)
[3](#)
[4](#)
[5](#)

Products

Select the relevant plans below and complete all required fields

When done, click Next.

By WalkMe

Select Your Products

Medical

Dental

Vision



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.

Medical Dental Vision

Include Elective Abortion Rider?

☐ Yes ☒ No

Please select your Dental Plan Contribution Type*

Add Ortho?*

Yes

Please select your Vision Plan Contribution Type *

Cancel Save for later

Next

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

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

BACK NEXT

Apply Filters

Clear All Filters

Network Type

☐ PPO

☐ HMO

Metal Level

☐ Platinum

☐ Bronze

☐ Gold

☐ Silver

CDH Plans

☐ HRA

☐ FSA

Available Plans

Compare

Plan Name	Deductible	Coinurance	Office Visit Copay	ER Copay	Rx Coverage	Monthly Premium
BCN Healthy Blue Living™ HMO Gold \$1000	\$1,000	20%	\$30	\$150	\$10/\$30/\$60/\$80/20%/20%	\$1,533/mo
BCN Healthy Blue Living™ HMO Gold \$1500	\$1,500	20%	\$30	\$150	\$6/\$25/\$50/\$80/20%/20%	\$1,508/mo
BCN Healthy Blue Living™ HMO Gold \$2000	\$2,000	20%	\$30	\$150	\$10/\$30/\$60/\$80/20%/20%	\$1,486/mo

Select Plan Compare



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.”

Member Level Designation

If you know which plan each member would enroll in, click yes. If not, click No to see rates for all the selected plans.

Choose Save for Later to designate plans at another time.

By WalkMe

Would you like to enter Employee Plan Elections?

☐ Yes ☒ No

Cancel

Next

Previous

Save for later

11. Quote details will appear. Click “Next.”

Quote Details

Below you will see the information you entered in the Group Profile page.

NEXT

Quote Details

Account Name:	GSD Group 24	Requested Effective Date:	Apr 1 2021	FTE:	3
Agent Name:	Manual agent m1	Requested Renewal Month:	April	Expected Active Enrolling:	3
Managing Agent:	Action Benefits	Rating Area:	B	Expected Waiving:	0

Quoted Products

Estimated Total Monthly Premium: \$2,804.04

MEDICAL		DENTAL		VISION	
Product Name	Est. Prem	Product Name	Est. Prem	Product Name	Est. Prem
Community Blue™ PPO Platinum \$500	\$2,663.99	Blue Dental™ PPO SG 80/50/50/50 (50/50/50/50)	\$126.50	Blue Vision™ 24/24/24	\$13.55



Quoting new business in OneSource

12. Quoted products will appear. Click “Next.”

Quote Summary

Quote Details

Account Name: GSD Group 24
 Agent Name: Manual agent m1
 Managing Agent: Action Benefits

Quoted Products

Estimated Total Monthly Premium: \$2,804.04

MEDICAL		DENTAL		VISION	
Product Name	Est. Prem	Product Name	Est. Prem	Product Name	Est. Prem
Community Blue™ PPO Platinum \$500	\$2,663.99	Blue Dental™ PPO SG 80/50/50/50 (50/50/50/50)	\$126.50	Blue Vision™ 24/24/24	\$13.55

Quoted Products Modal:

Quoted Products
 Below you will see the plans you have selected and the monthly premium.

BACK NEXT

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

Quote Summary

Quote Details

Account Name: GSD Group 24
 Agent Name: Manual agent m1
 Managing Agent: Action Benefits

Requested Effective Date: Apr 1 2021
 Requested Renewal Month: April
 Rating Area: B

Quoted Products

Estimated Total Monthly Premium: \$2,804.04

MEDICAL		DENTAL		VISION	
Product Name	Est. Prem	Product Name	Est. Prem	Product Name	Est. Prem
Community Blue™ PPO Platinum \$500	\$2,663.99	Blue Dental™ PPO SG 80/50/50/50 (50/50/50/50)	\$126.50	Blue Vision™ 24/24/24	\$13.55

Census with Rates Modal:

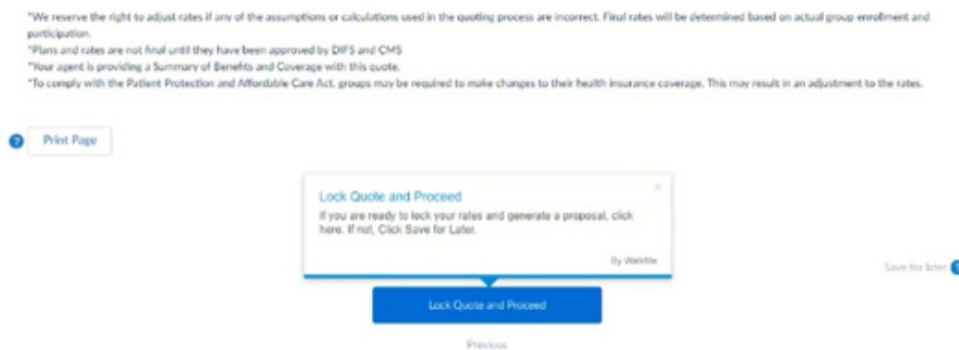
Census with Rates
 Below you will see the plan that employees have elected, with rates for each.

BACK NEXT

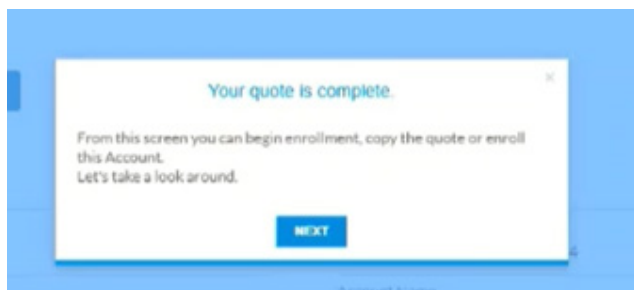
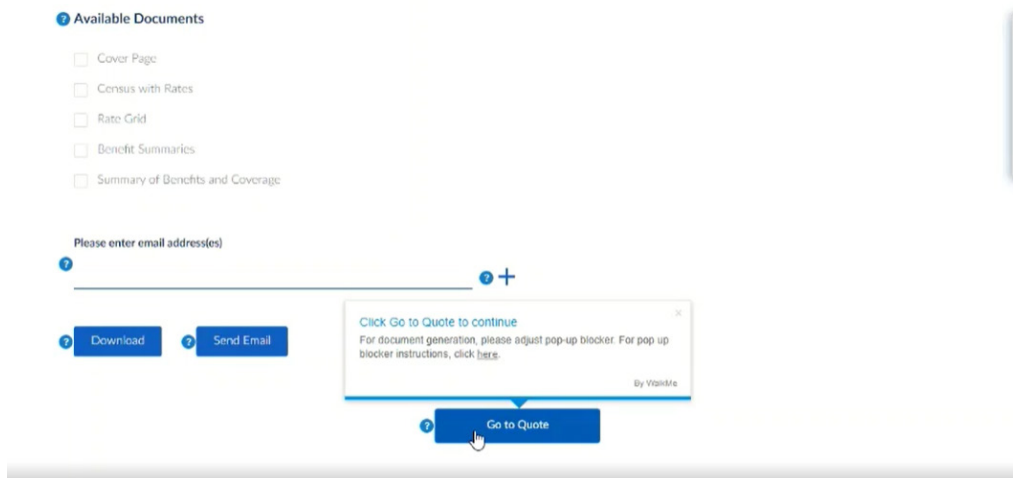


Quoting new business in OneSource

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.