



PRO Quote: BYOC

CREATE CUSTOM QUOTES EXACTLY THE WAY YOU WANT THEM

Did you know that recent enhancements to our popular Build Your Own Comparison tool (BYOC) make quoting Small Groups easier than ever? Check out the new “BYOC” quote option today and see for yourself.



COMPARE MORE PLAN OPTIONS

With the enhanced BYOC, you can now compare up to 30 plans at a time. In addition, you can include more than one *current* plan!



PREVIEW YOUR COMPARISON

The BYOC tool now offers a preview feature that lets you review your benefit comparison and then make changes, if you want. If you don't have time to finish the comparison, you can save it and go back to the BYOC later to complete it. When you're happy with the preview, you can generate your proposal or save your comparison for later.



SAVE STEPS, SAVE TIME

More good news: You no longer have to run a quote to run a BYOC: You can go directly to the BYOC. Think of how much time you'll save!

STEP 1: HOW DO I START?

In PRO Quote Accounts, run a new quote or edit an existing quote.

- A** When you are running a new quote (Quote This Group Again), click on “Custom Benefit Comparison.”
- B** When you are editing an existing quote (Quote ID), click on “Create BYOC.”
- C** Or click on “Create BYOC” under Additional Presentation Choices.

Choose the Quote Type

Which type of quote do you wish to create?

Standard Quote Multi Plan Calculator Enrollment Worksheet Custom Benefit Comparison

Cancel

Back To Quotes Avery's Sports Shop

ID	Effective Date	Employees Included	HQ Zip	SIC	Created
Q-0510-9252	11/1/2016	10	90210	3949: Sporting and Athletic Go...	5/26/2015 by broker, Test

Optional - Enter a name for this Quote to easily identify it later Save Quote Name

View / Print / Email Your Quote

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Create BYOC Edit This Quote

Benefit Comparison Reports			
Select	Report Name	PDF	Excel
<input type="checkbox"/>	Grand Summary	Preview	Preview
<input type="checkbox"/>	Medical Benefit and Rate Comparison	Preview	Preview
<input type="checkbox"/>	Medical Rate Comparison	Preview	Preview
<input type="checkbox"/>	Medical Benefit Comparison	Create	Creates
<input type="checkbox"/>	Ancillary Benefit and Rate Comparison	Preview	Preview
<input type="checkbox"/>	Ancillary Rate Comparison	Preview	Preview
<input type="checkbox"/>	Ancillary Benefit Comparison	Create	Creates

General Proposal Reports			
Select	Report Name	PDF	Excel
<input type="checkbox"/>	Cover Page	Preview	
<input type="checkbox"/>	Census	Preview	
	Export Census to Excel		Export
<input type="checkbox"/>	Ineligible Plan Report	Preview	
<input type="checkbox"/>	Benefits & Rates (One Plan Per Page)	Create	
<input type="checkbox"/>	Benefit Summary	Preview	
<input type="checkbox"/>	ACA Rate Table	Preview	
<input type="checkbox"/>	Guidelines and Important Features	Preview	

What would you like to do with the selected reports?
 Preview & download the selected reports as one file
 Email a link to the selected reports as one file

Additional Presentation Choices

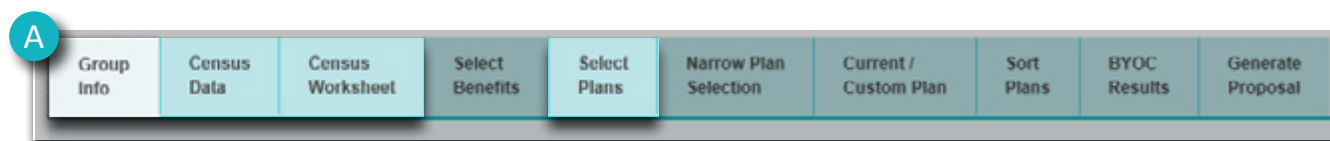
C Build Your Own Benefit Comparison

Create BYOC Click "Create BYOC" to create a Custom Benefit Comparison from this quote.
A Benefit Comparison quote allows you to compare your group's current plan to renewal options, including setting your own plan order and benefits.

STEP 2: CUSTOMIZE YOUR QUOTE

Begin your quote as usual by filling in the Group Info, Census Data, and Census Worksheet tabs.

- A When running a new quote, see steps 1 through 3 in the PRO Quote Quick Guide to complete the highlighted tabs.
- B When editing an existing quote, this information will already be filled out so you can skip ahead to any tab.



PRO Tip: You can now jump from one tab to another without having to move through them in order. For instance, you can jump from the BYOC Results tab to the Group Info or Census Data tab, make your changes, and then jump back.

STEP 3: SELECT BENEFITS AND NARROW PLAN SELECTION

Use the checkboxes to select the benefit categories and plan designs you would like to choose from for your comparison.

- A** Select the benefit categories you want to include.
- B** Select up to 30 plans for your comparison.

The screenshot shows the 'Narrow Plan Selection' step of the benefits selection process. On the left, a sidebar allows users to select benefit categories. A callout 'A' points to the 'Check All' button for the 'Medical' category. Below this, another callout 'B' points to the 'Check All' button for the '6 Plans Selected (33 max)' group. The main area shows a 'Presented By' text box with a dropdown menu set to 'Professional Broker II'. Below this is a table of 6 selected plans.

Carrier	Metallic Level	Type	Plan	Ded. Dent	Deductible	Office Visits	Inpatient Hospital Services	Out-of-Pocket Max	Prescription Drugs	Rate	EE in Area
<input type="checkbox"/> Anthem Blue Cross (CA)	Silver	HMO	Anthem Silver Priority Select HMO 1756/40%/6850	Emb	\$1,750/\$3,500 embedded	\$50/\$75 (ded waived)	40%	\$6,850/ \$13,700 embedded, includes ded	\$250/\$500 Ded (2-4); \$15/\$50/ \$80/ \$25% (Select)	\$1,781.59	5/5
<input checked="" type="checkbox"/> Health Net (CA)	Silver	HMO	CommunityCare HMO Silver \$20	Emb	\$2,000/ \$4,000 embedded- aggregate	\$0 (1st visit) then \$20/\$45 (ded waived)	30%	\$6,500/ \$13,000 embedded- aggregate, includes oed.	\$150 Ded (2-4); \$5/ \$40/\$60/00%	\$1,980.31	5/5
<input type="checkbox"/> Blue Shield of California	Bronze	PPO	Bronze Full PPO 3500/60 OREx	Emb	\$3,500/ \$7,000 embedded	\$0/\$70	15%	\$6,500/ \$13,000 embedded, includes oed	\$225/\$450 Ded (2-4); \$15/\$50/ \$75/00%	\$2,325.01	5/5
<input checked="" type="checkbox"/> Blue Shield of California	Bronze	PPO	Bronze Full PPO 4500/45 OREx	Emb	\$4,500/ \$9,000 embedded	\$45	30%	\$6,500/ \$13,000 embedded, includes oed	\$225/\$450 Ded (2-4); \$15/\$50/ \$75/00%	\$2,368.16	5/5
<input checked="" type="checkbox"/> Blue Shield of California	Silver	HMO	Silver Access+ HMO 1700/55 OREx	Emb	\$1,700/ \$3,400 embedded	\$55 (ded waived)	40%	\$6,500/ \$13,000 embedded, includes oed	\$275/\$550 Ded (2-4); \$15/\$55/ \$75/00%	\$2,386.34	5/5

STEP 4: CURRENT/CUSTOM PLAN

Select your group's current plans to be compared to the plans selected in STEP 3.

- A** Select whether the current plan is a prior effective date or a custom plan, or choose not to include current coverage.
- B** Select one or more of the current plans.

Group Info
Census Data
Census Worksheet
Select Benefits
Select Plans
Narrow Plan Selection
Current / Custom Plan
Sort Plans
BYOC Results
Generate Proposal

Medical
Dental
Vision

A

Select a prior effective date to compare: Effective:

Enter custom plan, benefits and rates. Carrier:

Do not include current coverage.
 Non-ACA Compliant
 51-99 Plans

[Find Plans](#)

Current Coverage. Choose at least one plan from below.

Check ▲	Carrier	Metallic Level	Plan Type	Plan Name	Ped Dent	Deductible	Office Visits	Inpatient Hospital Services	Out-of-Pocket Max	Prescription Drugs	Rate
<input checked="" type="checkbox"/>	Anthem Blue Cross (CA)	Bronze	PPO	Anthem Bronze PPO 5000/30%/6250	Emb	\$5,000/ \$10,000 aggregate embedded	\$60/\$70 (ded. waived first 3 visits) then \$60/\$70	30%	\$6,250/ \$12,500 aggregate embedded; includes ded	MedDed; \$15/\$50/ \$75/30%	\$2,301.25
<input checked="" type="checkbox"/>	Anthem Blue Cross (CA)	Silver	HMO	Anthem Silver HMO 1500/30%/6550	Emb	\$1,500/ \$3,000 (facility)	\$50/\$75 (ded. waived)	30% after \$1,500/ \$3,000 facility ded.	\$6,550/ \$13,100 aggregate embedded; includes ded	\$15; \$500/\$1,000 RxDed \$35/\$70/ 25%	\$2,518.25
<input type="checkbox"/>	Anthem Blue Cross (CA)	Bronze	PPO	Anthem Bronze PPO 6000/35%/6600	Emb	\$6,000/ \$12,000 embedded	\$70 (ded. waived first 3 visits) then 35%	35%	\$6,600/ \$13,200 aggregate embedded; includes ded	\$15; \$250/\$500 RxDed \$50/\$90/ 30%	\$2,428.32
<input type="checkbox"/>	Anthem Blue Cross (CA)	Bronze	PPO	Anthem Bronze Select PPO 5000/30%/6250	Emb	\$5,000/ \$10,000 aggregate embedded	\$60/\$70 (ded. waived first 3 visits) then \$60/\$70	30%	\$6,250/ \$12,500 aggregate embedded; includes ded	MedDed; \$15/\$50/ \$75/30%	\$2,168.63

STEP 5: SORT PLANS

Arrange the plans in the order you would like them to appear in your proposal.

- A Use "Sort Options" for default sorting options.
- B Use "Custom Sort" to drag and drop plans in any order you like.

The screenshot shows a software interface with a navigation bar at the top containing tabs: Group Info, Census Data, Census Worksheet, Select Benefits, Select Plans, Narrow Plan Selection, Current / Custom Plan, Sort Plans, BYOC Results, and Generate Proposal. Below the navigation bar are tabs for Medical, Dental, and Vision. The 'Sort Options' section (marked with 'A') contains a text box with instructions, a 'Sort by:' dropdown menu with options: Premium Only, Carrier / Metallic Level, Carrier / Metallic Level / Plan Type*, and Carrier / Plan Type*. Below the dropdown is a note: '* Examples of Plan Types: PPO, HMO, HSA'. To the right of the dropdown are radio buttons for 'Premium Sort': Premium Ascending (selected) and Premium Descending. An 'Apply Sort' button is also present. The 'Custom Sort' section (marked with 'B') contains a text box with instructions, a 'Base Plan:' dropdown menu with the selected value 'Anthem Blue Cross (CA) Anthem Bronze PPO 5000/30%/6250 (12/1/2015)', and a table of plan details.

Carrier	Metallic Level	Plan Type	Plan Name	Ped Dent	Deductible	Office Visits	Inpatient Hospital Services	Out-of-Pocket Max	Prescription Drugs	Premium
Anthem Blue Cross (CA) (12/1/2015)	Bronze	PPO	Anthem Bronze PPO 5000/30%/6250	Emb	\$5,000/ \$10,000 aggregate embedded	\$60/\$70 (ded. waived first 3 visits) then \$60/\$70	30%	\$6,250/ \$12,500 aggregate embedded; includes	MedDed; \$15/\$50/ \$75/30%	\$2,301.25

STEP 6: GENERATE PROPOSAL

When the system notifies you that “The data appears complete and the proposal is ready to be generated,” you are done!

- A Select “Generate Proposal.”
- B Download your Benefit Rate Comparison in PDF or Excel format.

