



PRO Quote

THE BEST SMALL GROUP QUOTING ENGINE IN THE INDUSTRY!

PRO Quote, developed by Warner Pacific, is a powerful quoting engine that allows you to create and customize Small Group quotes just the way you want them. Broker tested and approved, PRO Quote is the best tool of its kind in the industry.



QUOTE THE WAY YOU WANT

We designed PRO Quote to provide maximum flexibility so you can provide your clients with quotes that meet their exact specifications. Among the many agent-friendly options available with PRO Quote, you'll find you can customize benefit and rate spreadsheets, display different types of products (e.g., HMO, HSA, PPO) side by side, and quote on the go from your mobile phone or tablet!



SORT THE WAY YOU WANT

PRO Quote offers you just about any sorting option you could want, including sorting by rates, plans, carriers, metallic level, plan type or premium. You also have the ability to list Exchange carriers at the top, bottom or alphabetically.



DOWNLOAD THE WAY YOU WANT

After you create your quote, you can download proposals into Excel or print in PDF. More options for you means better-looking quotes for your clients!

STEP 1: ENTER YOUR GROUP INFORMATION

- A Group Name
- B ZIP Code
- C Effective Date
- D Coverage Type(s)

A Group Name:	<input type="text" value="Maggie's Shop"/>	
Group DBA:	<input type="text" value="Enter Group DBA Here"/>	
B Group Zip:	<input type="text" value="95050"/>	<input type="text" value="Santa Clara, Santa Clara"/>
Industry Code:	<input type="text" value="7389"/>	7389 - Business Services, NEC
	<input type="button" value="Lookup Adjustment Factor"/>	
Quote Name:	<input type="text" value="Optional, to easily identify it later."/>	
Employee Count:	<input type="text" value="6"/>	
C Effective Date:	<input type="text" value="12/01/2015"/> ▼	<input type="button" value="Lookup Carrier Availability"/>
D Coverage Types:	<input checked="" type="checkbox"/> Medical <input type="checkbox"/> Dental <input type="checkbox"/> Vision <input type="checkbox"/> Life	
Apply Broker Preferences:	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	



PRO Tip: Don't bother looking for the "Save" button. With the autosave function in PRO Quote, your input will be saved automatically in real time.

STEP 2: ENTER YOUR CENSUS

- A** Employee's First and Last Name
- B** Gender
- C** Date of Birth
- D** Home ZIP Code

#	First Name	Last Name	# Dep	Upd By	Gender	Age/DOB	Home Zip	C																					
1	Employee	001	2		M	2/2/1975	91361																						
<table border="1"> <thead> <tr> <th>Relation</th> <th>First Name</th> <th>Last Name</th> <th>Gender</th> <th>Age/DOB</th> <th>Home Zip</th> <th>C</th> </tr> </thead> <tbody> <tr> <td>Spouse/Partner</td> <td>001</td> <td>001</td> <td>F</td> <td>4/4/1976</td> <td>91361</td> <td>V</td> </tr> <tr> <td>Child/Dependent</td> <td>002</td> <td>001</td> <td>M</td> <td>5/5/2009</td> <td>91361</td> <td>V</td> </tr> </tbody> </table> <p>Add Dependent</p>									Relation	First Name	Last Name	Gender	Age/DOB	Home Zip	C	Spouse/Partner	001	001	F	4/4/1976	91361	V	Child/Dependent	002	001	M	5/5/2009	91361	V
Relation	First Name	Last Name	Gender	Age/DOB	Home Zip	C																							
Spouse/Partner	001	001	F	4/4/1976	91361	V																							
Child/Dependent	002	001	M	5/5/2009	91361	V																							
2	Employee	002	0		M	3/4/1977	91361																						
3	Employee	003	0		M	4/4/1966	91361																						



PRO Tip: Collect and submit census data with just a few clicks using the powerful PRO Census tool.

STEP 3: SELECT YOUR PLANS

- A Metallic Level
- B Plan Type
- C Carrier(s)
- D Multi-Option Package

Narrow Plan Selections / Preview Rates

A Show me only checked plans: Bronze Silver Gold Platinum Non-ACA Compliant
INDEM = Indemnity

Check All Uncheck All

B PPO: HMO: HSA: POS: EPO: INDEM:

C **Aetna (CA)** Check All Uncheck All PPO: HMO: HSA: INDEM:

Anthem Blue Cross (CA) Check All
Uncheck All PPO: HMO: HSA:

D Select PPO w/Priority Select HMO
PPO: HMO: HSA:



PRO Tip: Use Narrow Plan Selections to select just the plans you want.

STEP 4: GENERATE YOUR PROPOSAL

- A PRO Quote Checks for Complete Data Entry
- B Click on “Generate Proposal”

