

PriorityQuote renewal guide

All agents contracted to sell Priority Health small group plans automatically have access to our online quoting and enrollment tool, PriorityQuote. You can access the tool by logging into your account at priorityhealth.com/agent.



Use this guide for help with:

Quoting a renewing group

- Accessing your renewal package
- Create a quote
- Renewing your group
- Renewal decision form
- Employee enrollment information
- View rate details, plan details and rate grids

Renewed Groups

- Accessing rate grids
- Viewing current enrollment census

PriorityQuote technical support

Hours:

Mon. – Thurs. 7:30 a.m. – 7 p.m.

Fri. 9 a.m. – 5 p.m.

Sat. 8:30 a.m. – 12 p.m.

Contact info

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For more information, contact the small business team at 800.471.2504.

You can access the full PriorityQuote user guide and training videos for small group by logging into your account at: priorityhealth.com/agent/center/group/small/quoting/priorityquote-user-guide.

Renewal Quotes

- 1
- Log in to the Agent Center and select the **PriorityQuote** tile.
- 2
- Once logged in to PriorityQuote, select **Renewal Groups** located under the Small Group header, or scroll down to the Upcoming Renewals table.

Agent Center

PriorityQuote

Quote/enroll

Book of business

Small group

Start a new or renewal business quote

New groups

Renewal groups

Individual

Start a new MyPriority quote

Individual

Marketplace direct enrollment

Check for federal subsidy and enroll

Healthcare.gov

Recent activity

Search

Name	Enrollment type	Effective date	Status	Last activity date
Test Agency 1	Small group	8/1/2024	Quoting	Apr 1, 2024
Test Agency 2	Small group	9/1/2024	Quoting	Apr 1, 2024
Test Agency 3	Small group	9/1/2024	Quoting	Apr 1, 2024
Test Agency 4	Small group	7/1/2024	Quoting	Apr 1, 2024

Select view **renewal package** to view the initial renewal, including all current plan and benefit documents.

NOTE: Initial renewal is based on enrolled census at the time the quarterly renewals release. To update the renewal to current active enrollment, proceed to next section **Create a Quote**.

Upcoming renewals

Search

The view renewal package generates when the quarterly rates are released for ACA plans only. (Example: 7/1 generates for 10/1, 11/1 & 12/1 renewal dates)

Name	Enrollment type	Renewal date	Status	Action
Test Agency 1	Small group	9/1/2024	Renewal	<div>Quote Alternates</div>
Test Agency 2	Small group	9/1/2024	Quoting	<div>Quote Alternates</div> <div>View Renewal Package</div>
Test Agency 3	Small group	9/1/2024	Quoting	<div>Quote Alternates</div> <div>View Renewal Package</div>
Test Agency 4	Small group	9/1/2024	Quoting	<div>Quote Alternates</div> <div>View Renewal Package</div>

- 3
- View your groups renewal package or quote alternates by clicking on Quote Alternates. To refresh the census or make changes, select Quote Alternates.

Eligibility rules

Quotes / Applications / Enrollments

Review all quotes created for this group

1

2

3

4

5

Create a quote

(group's renewal date is upcoming)

- 4
- Use the default name. Select **Save**.
Quote will display current census as shown.

Agent Center

PriorityQuote

Quote/enroll

Book of business

Quote for: Test Quote

Agent name(s)

Group ID:

Quote name: Test Quote - 4/23/2024 1:25:07 PM

Quote ID: 741889

Rating factors

Renewal date: Sep 1, 2024

ZIP code: 88242

Country: OTTAWA

Total # of employees: 2

Total # of members: 8

Note: Changes made to the renewal census will become effective on the group's renewal date. To make changes to existing employees prior to the renewal date, download the Change form.

Waive all dental

#	First name*	Middle initial	Last name*	Relationship*	DOB*	Age	Disabled dependent	Medical status*	Dental status*	Actions
1	Test First Name		Test Last Name	Employee	X000000X	40		Enroll	Waive	<div><div></div><div></div><div></div></div>
	Test First Name		Test Last Name	Spouse	X000000X	41		Enroll	Waive	<div><div></div><div></div><div></div></div>
	Test First Name		Test Last Name	Child	X000000X	5	<div><div></div></div>	Enroll	Waive	<div><div></div><div></div><div></div></div>
	Test First Name		Test Last Name	Child	X000000X	3	<div><div></div></div>	Enroll	Waive	<div><div></div><div></div><div></div></div>
2	Test First Name		Test Last Name	Employee				Enroll	Waive	<div><div></div><div></div><div></div></div>

Export census

Employee

Continue

Name your quote

Or use the default name that appears below:

Test Quote - 4/23/2024 1:25:07 PM

Save

5 To modify census, select appropriate "action"

Quick tip: Open enrollment elections can be added to this page and are encouraged to be submitted at the time of the renewal decision.

First name	Middle Initial	Last name	Employee	mm/dd/yyyy		Enroll	Waive		
------------	----------------	-----------	----------	------------	--	--------	-------	--	--

From the new row, select the "+" to add a Spouse, Domestic Partner, or Child

3	Test	A	Person	Employee	09/01/2007	17		Enroll	Waive			
---	------	---	--------	----------	------------	----	--	--------	-------	--	--	--

Spouse
 Domestic partner
 Child

+ Employee if any new employees need to be added

3	Test	A	Person	Employee	09/01/2000	24		Enroll	Waive			
	Test	B	Person	Spouse	10/14/2001	22		Enroll	Waive			
	Test	C	Person	Child	04/01/2024	0	<input type="checkbox"/>	Enroll	Waive			

Export census

Employee
 Continue

6 Select **Continue** when all changes are made, or if no changes are necessary. Quote will display as shown.

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Hello Agent

[Agent Center](#)
[PriorityQuote](#)

[Quote/enroll](#)
[Book of business](#)

Quote for: Test Group

Copy this quote
View census

Agent name(s): Test Agent Name

Group ID: 123456
 Quote name: Test Quote - 4/23/2024 1:53:57 PM
 Quote ID: 741690

Rating factors		Total # of employees:	3
Renewal date:	09/01/2024	Total # of members:	8
ZIP code:	49424		
County:	OTTAWA		

Suggested

Non-ACA As-is

Current

	Monthly premium*	Percent Change
<input type="checkbox"/> PriorityPHO 1500 - West MI Partners (Kent)	\$2,000	10%↑
<input type="checkbox"/> PriorityPHO 2000 - West MI Partners (Kent)	\$2,100	10%↑
<input type="checkbox"/> PriorityPHO 2500 - West MI Partners (Kent)	\$2,200	10%↑

Selected plans
 For proposal or enrollment
 ▲ Select a plan to start enrollment

*Medical monthly premiums include taxes and fees.
 **Dental plans are not included. Select a dental plan below to add.

All plans (107)
 Medical plans (107)
 Dental plans

Search

*Medical rates include taxes and fees.
[View Small Business plan SBCs](#)

7 To view non-ACA as-is renewal rates, select the **Non-ACA As-Is** tab

- Current rates will show under the **Current** tab
- A suggested ACA plan will show under **Suggested Plans**
- Both the **Suggested Plan** and the **Non-ACA As Is plan** can be added to the proposal

8 To view ACA renewal rates, select **View Renewal Package**

Selected plans

For proposal or enrollment

▲ Select a plan to start enrollment

Create a proposal (full proposal package)

- 1 To create a proposal, check the box next to the plans you would like to include. You can quote medical plans together.
 - Suggested Plan and Non-ACA As-Is plans can be included in the proposal by checking the box next to the plan in the corresponding tab
 - For groups with multiple plans or when employees are transitioning between existing plans, use the 'assign plans' feature before enrolling.
- 2 All selected plans will display under Selected Plans. Once you've selected all the plans you wish to include, select **Create Proposal**.

The screenshot shows the 'Create proposal' interface. On the left, under the 'Suggested' tab, there are three plans listed with checkboxes: 'PriorityHMO 1500 - West MI Partners (Kent)' (\$1,800), 'PriorityHMO 2000 - West MI Partners (Kent)' (\$2,000), and 'PriorityHMO 2500 - West MI Partners (Kent)' (\$2,200). Below these are buttons for 'All plans (102)', 'Medical plans (102)', and 'Dental plans'. On the right, under the 'Selected plans' tab, there are four plans listed with checkboxes: 'PriorityPOS 475' (\$2,000), 'PriorityHMO 1500' (\$1,800), 'PriorityHSA PPO 3200' (\$1,600), and 'PriorityHSA POS 2350 100%' (\$1,400). Below these are buttons for 'Assign Plans', 'Create proposal' (highlighted with a red box), and 'Enroll'. At the bottom right, there is a 'Create proposal' button (highlighted with a red box).

- 3 Select which plan(s) to include as well as which documents and forms to include by selecting/de-selecting the checkbox(es).

The screenshot shows the 'Create proposal' interface. At the top, there is a green header bar with the text 'Create proposal'. Below this, there is a table titled 'Selected plans' with columns: 'Select', 'Metal tier', 'Plan name', and 'Monthly premium'. The table contains four rows of data, each with a checked checkbox in the 'Select' column. Below the table, there is a section titled 'Include these documents in the proposal:' with two columns of checkboxes. The first column has 'All' checked, and the second column has 'All' checked. At the bottom right, there is a 'Create proposal' button (highlighted with a red box).

- 4 Select **Create Proposal**.
- 5 Retrieve the zipped file from your browsers Download location. Extract and save the quote to your desired location (desktop, OneDrive, etc.)
- 6 Close the Create Proposal window by selecting the **X** in the top right corner.

View member level rates, plan details and rate grids during the quoting process

- 1 To view the member level rates for any plan, select the premium amount under **Monthly Premium** in the grid, or the **Monthly Premium** listed under **Selected Plans** for a window to display.

	Metal tier ▾	Plan name ▾	Monthly premium (without taxes and fees) ▾
<input checked="" type="checkbox"/>	Platinum	PriorityPPO 250 100%	\$ Premium
<input checked="" type="checkbox"/>	Platinum	PriorityPPO 250 90%	\$ Premium

Selected plans

For proposal or enrollment

Metal tier	Plan name	Monthly premium*
<input checked="" type="checkbox"/> Platinum	PriorityHMO 200 - Southeast MI Partners	\$ Premium
<input checked="" type="checkbox"/> Gold	PriorityPOS 1200 100%	\$ Premium
<input checked="" type="checkbox"/> Silver	PriorityHSA HMO 2200 - Southeast MI Partners	\$ Premium

[Assign Plans](#)
[Create proposal](#)
[Enroll](#)

Plan rate details

for Testing Group Creation

[See rate grid](#)
[See plan details](#)

PriorityPOS 1200 100%

Name	Relationship	Birth Date	Age	Member rate (with taxes and fees)
Stephanie Person	Employee	01/01/1984	40	\$ Premium
Mark Person	Spouse	02/01/1980	44	\$ Premium
Family total:				\$ Premium - Family Total
Group monthly total				\$ Premium - Group Total

Premium PEP: (1 employees) \$ Premium (with taxes and fees)
 Premium PMP: (2 enrollees) \$ Premium (with taxes and fees)

Annual total premium: (with taxes and fees) \$ Premium

- 2 To view the plan details, select **See Plan Details**.
- 3 To view the rate grids, select **See Rate Grid**. To print rate grids, select **Print** in the upper right-hand corner.
- 4 To print member level rates, select **Print** in the upper right-hand corner.

Plan rate details

for Testing Group Creation

[See rate grid](#)
[See plan details](#)

PriorityPOS 1200 100%

Name	Relationship	Birth Date	Age	Member rate (with taxes and fees)
Stephanie Person	Employee	01/01/1984	40	\$ Premium
Mark Person	Spouse	02/01/1980	44	\$ Premium
Family total:				\$ Premium - Family Total
Group monthly total				\$ Premium - Group Total

Premium PEP: (1 employees) \$ Premium (with taxes and fees)
 Premium PMP: (2 enrollees) \$ Premium (with taxes and fees)

Annual total premium: (with taxes and fees) \$ Premium

[Print](#)

Renewing your group

Quick tip: for groups with multiple plans or when employees are transitioning between existing plans, use the 'Assign Plans' feature before enrolling. Plan elections will carry over to the Employee Information after selecting Enroll.

- 1 Update renewal proposal to most current enrollment prior to submission by selecting **Create a Quote** found on the Group Details page.

Once that has been completed, select the box(es) next to the appropriate plan(s) and select **Enroll**.

The screenshot shows a web interface for selecting health plans. On the left, under the 'Suggested' tab, there are three plan options, each with a checkbox, a name, and a monthly premium. The first plan is selected. On the right, under the 'Selected plans' tab, the same plan is shown with its metal tier and a confirmation checkbox. At the bottom right are buttons for 'Assign Plans', 'Create proposal', and 'Enroll'.

Suggested			Selected plans			
			For proposal or enrollment			
			Metal tier	Plan name	Monthly premium*	
<input checked="" type="checkbox"/>	PriorityHMO 1500 - West MI Partners (Kent)	\$ Premium	<input checked="" type="checkbox"/>	Gold	PriorityHMO 1500 - West MI Partners (Kent)	\$ Premium
<input type="checkbox"/>	PriorityHMO 2000 - West MI Partners (Kent)	\$ Premium				
<input type="checkbox"/>	PriorityHMO 2500 - West MI Partners (Kent)	\$ Premium				

A green header bar contains the text 'CENSUS NOTIFICATION'. Below it, a message explains that census information may not be accurate if the proposal was created before today's date and provides instructions to update the enrollment. An orange 'Close' button is at the bottom right.

CENSUS NOTIFICATION

If this proposal was created prior to today's date, the census information may not be accurate. To capture the most current membership, update your enrollment by selecting "Create new Quote" button found in "Employee Information" section.

Close

Complete the renewal decision form

- 1 Enter the employee counts.
- 2 If the group is making changes, enter the group eligibility information and select **Save** once complete.
 - If no changes are needed, you may skip this step and the eligibility rules will remain unchanged.
 - **Quick tip:** If you are unsure whether changes are needed, you may select "Save" on the application and the eligibility information will be pre-filled once the page refreshes.
- 3 Complete Section 111.
- 4 Complete the pediatric dental section.
- 5 Select **Save** to save the group application.
 - Once saved, a notification message will display. Select the group application to remove the message.

Employee Enrollment Information

- 1 In most cases, employee forms should already be complete. Common missing information for incomplete employees includes social security numbers and phone numbers.
 - To complete or edit the individual employee forms for new employees or dependents, you can either **Edit All Demographics** at the same time, or select the pencil icon next to each employee and dependent to edit one at a time.
- 2 If the group is offering more than one option, select the medical plan if Assign Plans was not used previously.
 - If the group is only offering one plan, this field will default to the sold plan.
- 3 If the group selected an HMO or POS plan and any employees or dependents are missing primary care providers, select a primary care provider.
 - Enter the primary care provider first name, last name or PRPR ID.
 - Select the magnifying glass/search icon.
 - If there is only one result, the provider's name will automatically display.
 - If there are multiple provider results, select the appropriate provider and click **Choose Provider**.
 - Use the 'Auto Assign' checkbox if a member does not have a primary care provider. Note: Wait until the green check mark is displayed.
- 4 Select **Save** to complete the employee record. After selecting Save, there is a checkbox that must be checked to confirm the census is accurate before you can complete the Agent Acknowledgement.
- 5 Agent Signature: Sign the Agent Acknowledgement and select **Complete**.
- 6 The group is now complete and the application will be reviewed by Small Business Sales.
Note: The group status will show 'Sales Review' when the application is successfully submitted.

How to Find a Rate Grid for Groups

- 1 Log in to the Agent Center and select the **PriorityQuote** tile.
- 2 Search and select the **group name**.
- 3 Under **Quotes / Applications**, select the status (e.g., Approved or Passive Renewal).
- 4 Select the chosen plan name (e.g., HMO 1000).
- 5 When the plan benefit details appear, select **See Rate Grid**.

Viewing Current Enrollment Census

- 1 Log in to the Agent Center and select the **PriorityQuote** tile.
- 2 Search and select the **group name**
- 3 Scroll down to Current Enrollment Census and **expand**



Enrollment is based on previous day's actual enrollment and will reflect their current medical enrollment plan.

Convert to Excel: click on the green button.

