# Priority Quote 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**

Phone: 844.548.2574

Email: pqsupport@priorityhealth.com

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.



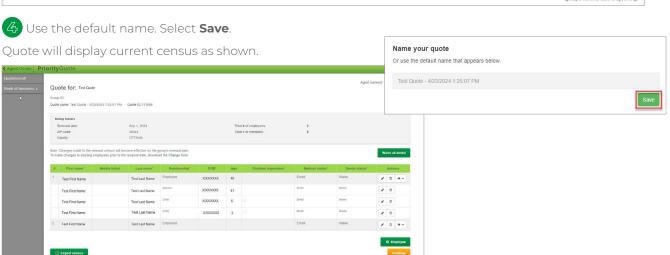
Select view **renewal package** to view the initial renewal, including all current plan and benefit documents

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**.



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





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

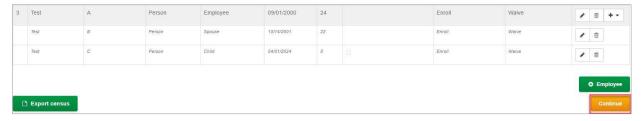
To modify census, select appropriate "action"



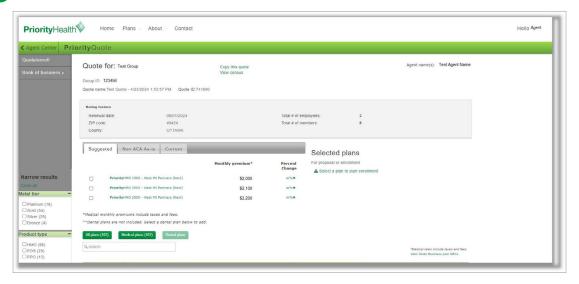
 $\cdot\,$  From the new row, select the "+" to add a Spouse, Domestic Partner, or Child



· + Employee if any new employees need to be added



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



- 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**
- $\cdot$  Both the **Suggested Plan** and the **Non-ACA As Is plan** can be added to the proposal
- To view ACA renewal rates, select View Renewal Package

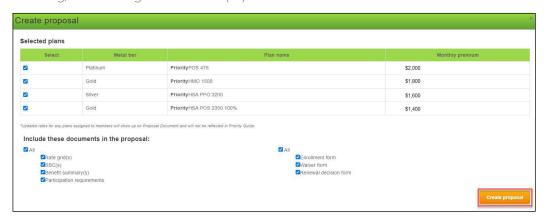


#### Create a proposal (full proposal package)

- 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**.



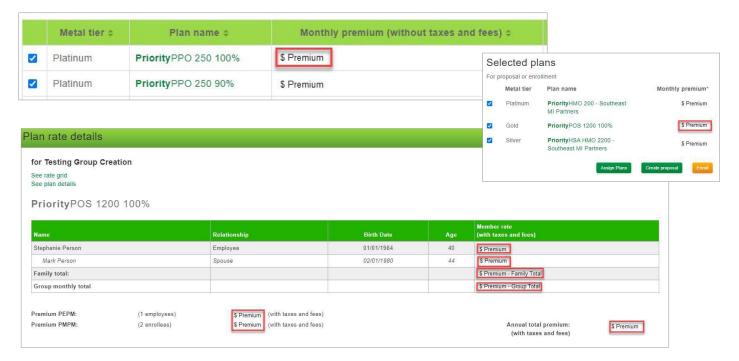
Select which plan(s) to include as well as which documents and forms to include by selecting/de-selecting the checkbox(es).



- Select Create Proposal.
- 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.



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



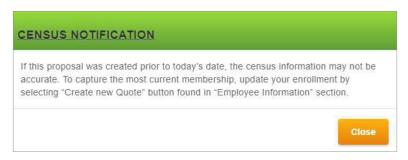
#### Renewing your group

**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.

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.





# 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.
- 💪 Complete the pediatric dental section.
- 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.
- 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.
- 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.
- 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.
- Search and select the group name.
- Under Quotes / Applications, select the status (e.g., Approved or Passive Renewal).
- Select the chosen plan name (e.g., HMO 1000).
- 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
- 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.

