

# benefit*express* v2.0 Broker Tips



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- I) **New URL:** Benefit**express** Version 2.0 (V2) can be accessed by going to <https://be.cvty.com>.
- A) **SHS:** V2 will be used for all new business and renewal cases with the effective/renewal date of December 1, 2009.
- B) **Historic Cases:** Cases with effective dates prior to your health plan's assigned effective date will be available in V1 (<https://benefitexpress.cvty.com>) until the site is retired.
- C) **Username & Passwords:** To simplify the transition, users will be able to use the same username and password in both benefit**express** environments (V1 and V2).
  - i) **Password Resets:** Brokers Requesting Password resets should specify the appropriate version when making password reset requests.

## II) Login Screen:

- A) **Welcome Screen:** The benefit**express** V1 Welcome screen where the user was first required to select their Health Plan from a drop-down list, has been eliminated. This step is no longer necessary with the new system design.



- III) **Breadcrumbs:** Breadcrumb navigation shows the user's path to their current location. These navigation tools are used in the new benefit**express** interface. Breadcrumbs give users a way to keep track of their location within the application and display under the screen title. For example, an Agent creating and submitting a case to Underwriting would see the following breadcrumbs:

Agent Home > Add Case > Purchaser Information > Census > Available Products > Selected Products > Proposal > Enroll Products and Case > Agent Submission

If you receive an application error and are unable to navigate off the screen via the navigation bars or continue buttons, using the breadcrumbs will permit the user to leave the screen; however, unsaved edits on the screen are not committed to the database.

- A) **Exception:** Breadcrumbs do not display in the Agent Registration screens.

## IV) Global Navigation Bar:

- A) **Print:** A print icon has been added to the Global Navigation Bar. Using the browser's print function distorts pages printed from within benefit**express**. Using the benefit**express** print icon located on the Global Navigation bar ensures that screens print correctly. For screen prints on most screens, the page orientation should be changed to landscape.
- B) **Help:** Help has temporarily been removed from benefit**express**.

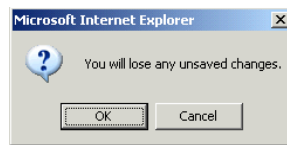


- V) **Pop-up Blocker:** If you are experiencing issues with viewing the separate proposal window, hold the CTRL key while clicking the CONTINUE button on the proposal screen. This will allow you to view the proposal window.

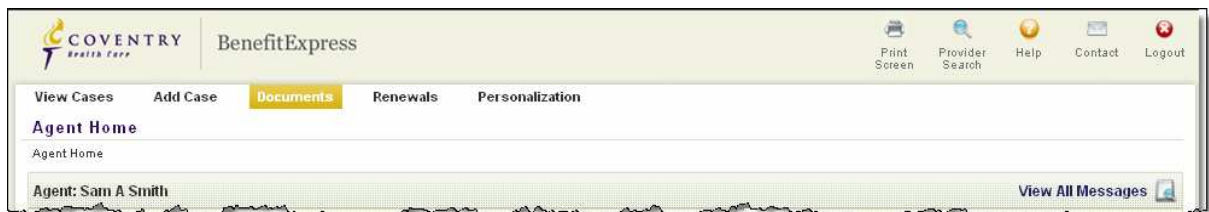
**VI) Drop-down Menu Navigation:** V2 drop-down menus function differently than the V1 drop-down menus. V1 drop-down menus allowed users to use the down arrow key to scroll through the menus. V2 drop-down menus do not support down arrowing through the menu, but instead allows users to type into the drop-down box, which then filters the list, displaying only the records that match. Below are two examples from the Purchaser screen.

<p>*Prior Carrier: Pr</p> <ul style="list-style-type: none"> <li>Preferred Health Network</li> <li>Preferred Health Systems</li> <li>Principal</li> </ul>	<p>*County: Wa</p> <ul style="list-style-type: none"> <li>Warren</li> <li>Washington</li> <li>Wayne</li> </ul>
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**VII) Warning Message:** A new feature of benefitexpress warns users when exiting a case that exiting without saving may cause a loss of data.



**VIII) Agent Primary Navigation Bar:** The Documents link located on the Agent's Primary Navigation bar no longer directs the agent to the Health Plan's Broker Portal, but to the Health Plan's Home page. To locate Broker documents, the Agent should click on **Help and Support > Broker > Marketing Tool Kit > Marketing Materials**.



**IX) All Carriers except Southern Health Services (SHS):** Five tier rates will display on all the product screens in BE. At this time, only SHS utilizes five tier rating; all other carriers will show the same rate for Employee + Child and Employee + Children tiers. The Employee + Children field on the Summary Rate Page will show \$0.00 for all carriers except SHS.

Premier PPO \$10\$10			
TIER:	NUMBER OF SUBSCRIBERS:	RATE:	TIER MONTHLY PREMIUM:
EMPLOYEE	11	\$571.58	\$6,287.38
EMPLOYEE + SPOUSE	1	\$1,571.85	\$1,571.85
EMPLOYEE + CHILD	1	\$1,143.16	\$1,143.16
EMPLOYEE + CHILDREN	0	\$1,143.16	All carriers <b>except</b> SHS will show \$0.00. <b>\$0.00</b>
FAMILY	3	\$1,714.74	\$5,144.22
Estimated Monthly Premium:			\$14,146.61

- I) **Old V1 & New V2 Cases:** Cases that are started in BE V1 will be finished in V1. The V2.0 go-live will be effective date driven. Once health plans are live on V2.0, any new cases for the given effective date forward will be created in V2.0.
- II) **Quote ID:** The Quote ID is a new field add to the new benefitexpress application. The Quote ID is a unique identification number assigned to each case. This identifier simplifies locating a case for review and eliminates the confusion created by cases with the same or similar names. The Quote ID field displays in the header of each Proposal page, the Case List screen and the Purchaser screen.
- III) **Updating the Purchaser Location:** If the purchaser location information needs to be updated or was incorrectly entered on the case, we have some quick tips to easily update the address information. First, delete the city, second, change the State and Zip then *delete* the County. Lastly, click save and it will re-populate the City and County based on the updated Zip and State. If there is more than one county, select the one you want from the drop-down list and save again.
- IV) **Screen Name Changes:** The Employer screen has been renamed to Purchaser and the Employee screen is now named the Subscriber screen. Users will also see the name changes along the Case Navigation Menu.



- D) **Product Comparison Page:** This new exhibit will display up to fifteen (15) alternates for each renewing Product and include a signature line for the group to provide sign off. If you would like to show your group additional alternate products on a renewal case, you can add the alternates on the product screen before generating this exhibit. Please note, there is a maximum of fifteen (15) products per each renewing product.

[CARRIER/PLAN NAME HERE]											
FREEMAN DECORATING CO. 700511000											
<b>Demographics:</b>				<b>Contacts:</b>				<b>Other Factors:</b>			
County:	Allegheny			Agent:	Jim Smith			SIC Code:	5713		
Region:	WPA			Agency:	ACME Insurance Agency			Association:	None		
State/Zip:	PA	15222		Account Mgr.:	Dore Jones			Renewal Date:	07/01/2008		
DETAIL INCLUDING RIDERS FOR SUBGROUP 700511001											
<input checked="" type="checkbox"/>	PRODUCT NAME	RX	VISION	WEIGHT MGT.	MH/SA	CHRO	GASTRIC	HSA	HRA	PREMIUM	
										GROUP	% Change
<b>PROPOSED RENEWING PRODUCT:</b>											
<input type="checkbox"/>	Freem FP0 15/20	\$15/\$25/\$50 \$100 Ind/\$300 Fam Deductible	QHDHP Not Included Vision	Yes	80% MH HMO/P/CS	QHDHP Chiro Not Included	Gastric Bypass Exclusion	C3 Prime HSA	NONE	\$6,202.55	2.0%
<b>ALTERNATE(S):</b>											
<input type="checkbox"/>	Product1	\$10/\$35/\$60	HIGH	NO	YES	NO	NO	NO	YES	\$6,152.55	(8.6%)
<input type="checkbox"/>	Product2	\$10/\$35/\$60	HIGH	No	YES	NO	NO	NO	NO	\$6,102.55	(8.1%)
<input type="checkbox"/>	Product3	\$10/\$35/\$60	NO	YES	YES	NO	NO	NO	YES	\$6,052.55	(8.2%)
<input type="checkbox"/>	Product4	\$10/\$35/\$60	HIGH	NO	YES	NO	NO	NO	YES	\$6,002.55	(7.9%)
<input type="checkbox"/>	Product5	\$10/\$35/\$60	HIGH	YES	YES	NO	NO	NO	NO	\$5,952.55	(7.7%)
<input type="checkbox"/>	Product6	\$10/\$35/\$60	NO	YES	YES	NO	NO	NO	YES	\$5,902.55	(7.5%)
<input type="checkbox"/>	Product7	\$10/\$35/\$60	HIGH	NO	YES	NO	NO	NO	YES	\$5,852.55	(7.3%)
<input type="checkbox"/>	Product8	\$10/\$35/\$60	HIGH	YES	YES	NO	NO	NO	NO	\$5,802.55	(7.1%)
<input type="checkbox"/>	Product9	\$10/\$35/\$60	NO	YES	YES	NO	NO	NO	YES	\$5,752.55	(6.9%)
<input type="checkbox"/>	Product10	\$10/\$35/\$60	HIGH	NO	YES	NO	NO	NO	YES	\$5,702.55	(6.7%)
<input type="checkbox"/>	Product11	\$10/\$35/\$60	HIGH	YES	YES	NO	NO	NO	NO	\$5,652.55	(6.5%)
<input type="checkbox"/>	Product12	\$10/\$35/\$60	NO	YES	YES	NO	NO	NO	YES	\$5,602.55	(6.3%)
<input type="checkbox"/>	Product13	\$10/\$35/\$60	HIGH	NO	YES	NO	NO	NO	YES	\$5,552.55	(6.1%)
<input type="checkbox"/>	Product14	\$10/\$35/\$60	HIGH	YES	YES	NO	NO	NO	NO	\$5,502.55	(5.8%)
<input type="checkbox"/>	Product15	\$10/\$35/\$60	NO	YES	YES	NO	NO	NO	YES	\$5,452.55	(5.6%)
<b>NOTE: <input checked="" type="checkbox"/> Check the box associated with the product you are selecting for renewal. Please send the signed copy of this page to your Account Manager.</b>											
Rate Accepted by: _____				Title: _____				Date: _____			