



Limelight Health QuotePad

Integration Platform as a Managed Service

CRM to Quoting to Enrollment

Single Point of Data Entry

BenefitsGuide and QuotePad

Agenda

- Problem
 - Multiple systems are required to be an insurance broker
 - Redundant data entry
- Solution
 - System integration
 - Single point of data entry
- Benefits
 - Eliminate redundant data entry
 - Reduce the amount of time required to manage your business
- BenefitsGuide and Limelight Health QuotePad Integration
 - What is Limelight Health QuotePad?
 - What does Limelight Health QuotePad do?
 - What does the Integration do?
 - Sample reports

Problem

- Multiple systems are required to manage an insurance broker business and these systems are not integrated:
 - CRM
 - Quoting
 - Benefit Administration Platform
 - Commissions
 - Document Generation
- Redundant data entry is required; it is expensive, time consuming, and inaccurate.

Imagine a Single Point of Data Entry

- Imagine if all these different systems could communicate directly?
- Imagine if you could sync the data entered in your CRM with your:
 - Quoting
 - Commission Accounting
 - Benefit Administration and Enrollment Platform
 - Document Generation

Solution

- The solution is the BenefitsGuide Integration Platform as a Managed Service
- It creates a secure bidirectional integration that allows these systems to directly communicate

What is a system integration?
The process of bringing together different software applications so that the systems can cooperate and act as one coordinated system.



Benefits

- Eliminate redundant data entry
 - Reduce the amount of time required to manage your business
 - Save money
 - Improve accuracy

What Is Limelight Health QuotePad?

Limelight Health QuotePad is a powerful real-time quoting platform, Real-time employee contribution modeling, and employee decision support tools for the following small group and mid-size markets:

- Medical
- Dental
- Vision
- Basic Life
- Voluntary Life
- Short-Term Disability
- Long-Term Disability
- GAP Medical
- Critical Illness
- Hospital Indemnity

What Does Limelight Health QuotePad Do?

- Creates beautiful branded customizable proposals of medical, dental, vision, life and more
- Real-time employee contribution modeling
- Employee decision support tools

QuotePad is your solution for a better, more efficient way to manage your small group quoting, employee contribution modeling and decision support tools.

What Does the Integration Do?

- Allows these systems to communicate directly
- All the data needed to run quotes in QuotePad is pushed from BenefitsGuide when you click “Sync with QuotePad”

“Sync with QuotePad”

The screenshot displays the BenefitsGuide web application interface. At the top, there is a navigation bar with links like 'Show Feed', 'Back to List: Custom Settings', and various plan categories. Below this, the 'Account Detail' section is visible, featuring a toolbar with buttons: 'Edit', 'Delete', 'Sharing', 'Sync with QuotePad' (highlighted in yellow), and 'Delete from QuotePad'. The 'Account Information' section below contains fields for 'Account Owner' (BAdmin for Div 3), 'Account Name' (Quotepad Test Group), 'Parent Account', 'Account EIN', 'Industry', 'SIC Code' (0219), and 'Employees'. To the right, there are fields for 'Account Record Type', 'Account Status' (Prospect), 'Client as of date', and 'Phone'. A red arrow points from a yellow callout box to the 'Sync with QuotePad' button in the Account section.

Simply Click the button labeled 'Sync with QuotePad' on either the Account or Contact record in BenefitsGuide

The 'Contact Detail' section is also visible, showing a toolbar with 'Edit', 'Delete', 'Clone', 'Sync with QuotePad' (highlighted in yellow), and 'Delete from QuotePad'. The 'Contact Information' section includes fields for 'Name' (Prakash Nawale), 'Nickname', 'Account Name' (Quotepad Test Group), 'Household Account', 'Title', 'Occupation', 'Class', 'Reports To' (View Org Chart), 'Department', 'Birthdate' (5/3/1989), 'SSN', and 'Date of Hire' (9/27/2017). A red arrow points from the same yellow callout box to the 'Sync with QuotePad' button in the Contact section.

“Sync with QuotePad” on the Account record

- Simply by clicking on “Sync with QuotePad” you can push the information and current employee census from BenefitsGuide to QuotePad so that you can run quotes
- BenefitsGuide validates all of the required field values so that only clean data is sent to QuotePad

“Sync with QuotePad” on the Contact record

- Simply by clicking on “Sync with QuotePad”, you can create a new Contact or update an existing record so the group census is always current in QuotePad
- BenefitsGuide validates all of the required field values so that only clean data is sent to QuotePad

Here is the Group and Census in QuotePad

LimelightHealth
enhancing business insurance

HOME GROUPS ALL PROPOSALS TOOLS Prakash Nawale
Prototype User

QuotePad Test Group Custom Plans Quotes Group Proposals Enrollment Documents Census Profile

Basic Contact Current Coverage Classes

Edit Group
Company Information

Company Name*
QuotePad Test Group

Address: Woodbury Zip Code* (Main Address): 11797 City: Woodbury State: NY Country: Nassau

SIC Code:
0219: general livestock, nec

LimelightHealth
enhancing business insurance

HOME GROUPS ALL PROPOSALS TOOLS Prakash Nawale
Prototype User

QuotePad Test Group Custom Plans Quotes Group Proposals Enrollment Documents Census Profile

Census Census Requirements Save UPLOAD A NEW CENSUS ADD AN EMPLOYEE

View Employees View Dependents Total EEs: 1 | Eligible EEs: 1 | Out-of-State EEs: 0 Basic Job/Other Class/Other Current Volumes Contact Info

	First Name	Last Name	Date of Birth	Age	Sex	Zip	Medical Tier	Dental Tier	Vision Tier	Salary	
▼	Prakash	Nawale	05/03/1989	27	M	11797	Employee - Child	Employee - Child	Employee - Child	1000	⋮
SP	Spouse First Name1	Spouse Last Name1	06/27/2016	0	F	11797	Covered Spouse	Covered Spouse	Covered Spouse		✕
CH	Child 1 First Name1	Child 1 Last Name1	09/10/2014	2	M	11797	Covered Dependent	Covered Dependent	Covered Dependent		✕

Simple Side-by-Side Medical Plan Comparison from QuotePad



Simple Side-by-Side Medical Plan Comparison

Quote Name: Medical Quote



BENEFITS	Signature Silver 50-75/40%/2250ded	Signature Gold 30-50/30%/1000ded	Select Plus State Gold 25/20%	Non-Differential PPO Silver 2250/30%
Provider Network	(Full) Signature Value	(Full) Signature Value	(Full) Select Plus	(Full) Non-Differential
Deductible Single	\$2,250	\$1,000	\$0	\$2,250
Deductible Family	\$4,500	\$2,000	\$0	\$4,500
OOP Max Single	\$7,350	\$5,500	\$4,000	\$7,350
OOP Max Family	\$14,700	\$11,000	\$12,000	\$14,700
Co-Insurance	40%	30%	20%	30%
Doctor Visits / Specialist Visits	\$50 (ded waived) / \$75 (ded waived)	\$30 (ded waived) / \$50 (ded waived)	\$25 / \$55	30% after ded / 30% after ded
Emergency Room Visit	40% after ded	30% after ded	\$325	30% after ded
Rx Deductible (Non-Generic)	\$200	\$0	\$0	\$200
Prescriptions (Rx Tier 1 / 2 / 3 / 4)	\$25 (Rx Ded waived) / \$50 after Rx Ded / \$100 after Rx Ded / 25% after Rx Ded; \$250 max	\$15 / \$35 / \$70 / 25%; \$250 max	\$15 / \$55 / \$75 / 20%; \$250 max	\$20 (Rx Ded waived) / \$50 after Rx Ded / \$100 after Rx Ded / 25% after Rx Ded; \$250 max
COST	3 EEs 0 DEPs 3 Total	0 EEs 0 DEPs 0 Total	0 EEs 0 DEPs 0 Total	0 EEs 0 DEPs 0 Total
Employee Monthly Premium	\$252	0	0	0
Employer Monthly Premium	\$757	0	0	0
Total Monthly Premium	\$1,009	0	0	0
TOTAL MONTHLY COST	\$1,009			
TOTAL EMPLOYEE COST	\$252			
TOTAL EMPLOYER COST	\$757			

Effective Date: 01/01/2018 | Premium Contribution: EE: 75% | SP: 0% | CH: 0% | SP+CH: 0% | Contribution Target Plan: None | DEP Rollover: No

Simple Side-by-Side Medical Plan Comparison from QuotePad



Simple Side-by-Side Medical Plan Comparison

Quote Name: Medical Quote



BENEFITS	Gold 80 HRA HMO 2250/35 + Child Dental	Gold 80 HMO 0/25 + Child Dental	Full Network HMO Silver \$40	Select Plus State Silver 45/2000/20%	Select Plus Gold 25/1500/20%	Full Network HMO Gold \$30
Provider Network	(Full) Kaiser Permanente	(Full) Kaiser Permanente	(Full) Full Network HMO	(Full) Select Plus	(Full) Select Plus	(Full) Full Network HMO
Deductible Single	\$2,250	\$0	\$0	\$2,000	\$1,500	\$0
Deductible Family	\$4,500	\$0	See Benefit Brochure	\$4,000	\$3,000	\$0
OOP Max Single	\$7,000	\$6,000	\$7,200	\$7,000	\$6,000	\$5,000
OOP Max Family	\$14,000	\$12,000	See Benefit Brochure	\$14,000	\$12,000	\$10,000
Co-Insurance	25%	0%	50%	20%	20%	0%
Doctor Visits / Specialist Visits	\$35 (ded waived) / \$35 (ded waived)	\$25 / \$55	\$40 / \$60	\$45 (ded waived) / \$75 (ded waived)	\$25 (ded waived) / \$50 (ded waived)	\$30 / \$50
Emergency Room Visit	25% after ded	\$325	50%	\$350 (ded waived)	\$150 (ded waived)	\$300
Rx Deductible (Non-Generic)	\$0	\$0	\$250	\$125	\$0	\$0
Prescriptions (Rx Tier 1 / 2 / 3 / 4)	\$15 / \$30 / \$30 / 20%; \$250 max	\$15 / \$55 / \$55 / 20%; \$250 max	\$20 (Rx Ded waived) / 50% after Rx Ded; \$250 max / 50% after Rx Ded; \$250 max	\$15 after Rx Ded / \$55 after Rx Ded / \$85 after Rx Ded / 20% after Rx Ded; \$250 max	\$15 / \$35 / \$70 / 25%; \$250 max	\$15 / \$50 / \$70 / 30%; \$250 max
COST	3 EEs 0 DEPs 3 Total			3 EEs 0 DEPs 3 Total		
TOTAL MONTHLY COST	\$977			\$1,234		
TOTAL EMPLOYEE COST	\$244			\$309		
TOTAL EMPLOYER COST	\$733			\$926		
	EE	DEP	TOTAL	EE	DEP	TOTAL
Kobe Bean (91206/32yr/EE:1)	\$310	--	\$310	\$349	--	\$349
Jeanie Buss (90041/27yr/EE:1)	\$274	--	\$274	\$309	--	\$309
George Pilinka (90210/46yr/EE:1)	\$393	--	\$393	\$443	--	\$443

Effective Date: 01/01/2018 | Premium Contribution: EE: 75% | SP: 0% | CH: 0% | SP+CH: 0% | Contribution Target Plan: None | DEP Rollover: No






Employee Decision Support: Medical Plan Options from QuotePad

HI KOBE BEAN!

Your Plan Starts: 01/01/2018
Payroll Deduction: Monthly

EMPLOYEE DECISION SUPPORT: MEDICAL PLAN OPTIONS

Your Employer is Contributing: EE: 75% | SP: 0% | CH: 0% | SP+CH: 0%
Contribution Target Plan: None
EE Rollover to Dependents: No

	\$80	\$92	\$116	\$157
 MEDICAL				
Total Rates (Before Employer Contribution)	Signature Silver 50-75/40%/2250ded	Signature Gold 30-50/30%/1000ded	Select Plus State Gold 25/20%	Non-Differential PPO Silver 2250/30%
Kobe Bean (32)	<input type="checkbox"/>			
	\$319.95	\$369.79	\$463.56	\$627.31
Total Premium	\$319.95	\$369.79	\$463.56	\$627.31
Your Cost (After Employer Contribution)				
Just You	\$79.99	\$92.45	\$115.89	\$156.83
Your Benefit Highlights				
Deductible Single	\$2,250	\$1,000	\$0	\$2,250
Deductible Family	\$4,500	\$2,000	\$0	\$4,500
OOP Max Single	\$7,350	\$5,500	\$6,000	\$7,350
OOP Max Family	\$14,700	\$11,000	\$12,000	\$14,700
Co-Insurance	40%	30%	20%	30%
Doctor Visit	\$50 (ded waived)	\$30 (ded waived)	\$25	30% after ded
Rx Tier 1	\$25 (Rx Ded waived)	\$15	\$15	\$20 (Rx Ded waived)
Rx Tier 2	\$50 after Rx Ded	\$35	\$55	\$50 after Rx Ded
CHECK THE PLAN YOU WANT AND WHO TO ENROLL	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

If enrolling at least one member of your household...

STEP 1 - Check the box next to each member of your household you would like to cover.

STEP 2 - Check the box at the bottom of the plan you want to enroll in.

STEP 3 - Sign and date this page and turn it into your employer.

If waiving all members of your household...

STEP 1 - Check the box below. Leave all other checkboxes

blank

STEP 2 - Sign and date this page and turn it into your employer.

I AM WAIVING MEDICAL COVERAGE ☐

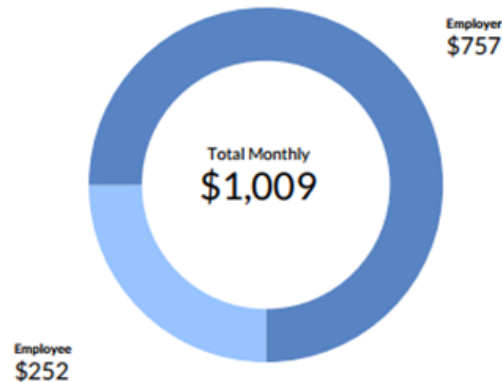
Signature _____ Date _____

Medical Quote Overview from QuotePad



Medical Quote Overview Medical Quote

Quote Name: Medical Quote



Census	
Employee Only	3
Employee & Spouse	0
Employee & Child(ren)	0
Employee & Family	0
Total Employees	3
Total Dependents	0
Total Covered Lives	3
Waiving Employees	0
Waiving Dependents	0
Total Waiving	0

Plans	
United Healthcare Signature Silver 50-75/40%/2250ded	(3 EEs)
United Healthcare Non-Differential PPO Silver 2250/30%	(0 EEs)
United Healthcare Select Plus State Gold 25/20%	(0 EEs)
United Healthcare Signature Gold 30-50/30%/1000ded	(0 EEs)

Contributions	
For Employee	75%
For Spouse	0%
For Child(ren)	0%
For Family	0%
Target Plan:	None
Dependent Rollover:	No

Cost Comparison from QuotePad



Cost Comparison [6 Plans] Medical Quote

Premium Contribution: EE: 75% | SP: 0% | CH: 0% | SP+CH: 0%
Census: EE: 3 | DEP: 0 | Lives: 3
Effective Date: 01/01/2018

Plan	Deductible	ER Cost EE Cost	Eligible Employees	ER Cost	EE Cost	Total
Kaiser Permanente Gold 80 HRA HMO 2250/35 + Child Dental	\$2,250 / \$4,500	<div><div></div></div>	3/3	\$733	\$244	\$977
Kaiser Permanente Gold 80 HMO 0/25 + Child Dental	\$0 / \$0	<div><div></div></div>	3/3	\$826	\$275	\$1,102
HealthNet Full Network HMO Silver \$40	\$0 / See Benefit Brochure	<div><div></div></div>	3/3	\$887	\$296	\$1,183
United Healthcare Select Plus State Silver 45/2000/20%	\$2,000 / \$4,000	<div><div></div></div>	3/3	\$926	\$309	\$1,234
United Healthcare Select Plus Gold 25/1500/20%	\$1,500 / \$3,000	<div><div></div></div>	3/3	\$977	\$326	\$1,303
HealthNet Full Network HMO Gold \$30	\$0 / \$0	<div><div></div></div>	3/3	\$1,004	\$335	\$1,339

Questions?

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