Highmark Plan Advisor

Producer Quick Reference Guide

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Highmark Plan Advisor

The Highmark Plan Advisor provides an easy-to-use, online interface that automates the small group quote-through-enrollment process for new enrollment. It saves time, reduces paperwork, and has up-to-date information – at the member and account levels – of where each person is in the enrollment process.

IMPORTANT

Do not use the **browser Back** button while in this application; use the Plan Advisor Back Button Back feature! In addition, remember in order for data to be saved, you must click either Save or Save and Continue before using the Plan Advisor Back feature. Minimum computer resolution for the application is 1024 X 768.

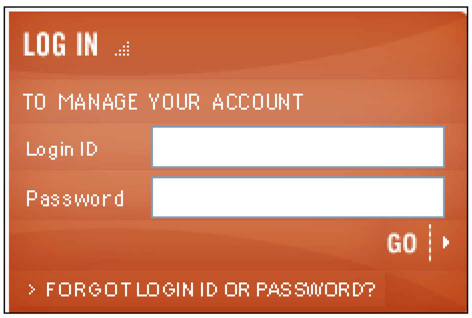
Access Highmark Plan Advisor

Logon Instructions

Use these steps to access Highmark Plan Advisor.

1. Access Highmark Producer Portal
2. Click **Producers** tab

3. Enter **Login ID** and **Password**

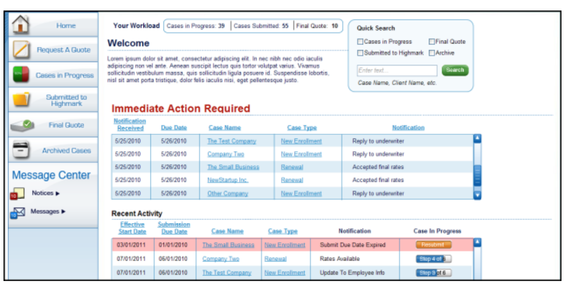


4. Click **Go**

   The ***Producer Portal*** window appears

5. Click **Manage Small Group Coverage**

   The ***Highmark Plan Advisor*** window appears

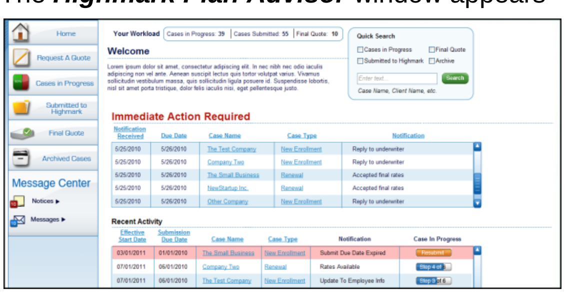


Or

From the New Business tab:

1. Click **Mange Small Group Coverage**

   The ***Highmark Plan Advisor*** window appears

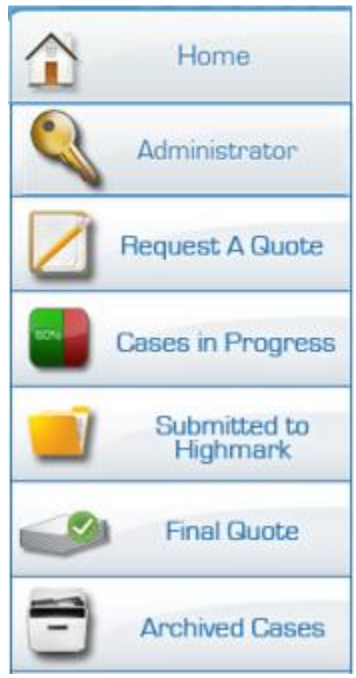


Plan Advisor Features

The dashboard provides online status tracking, quoting, message alerts, updates and more.

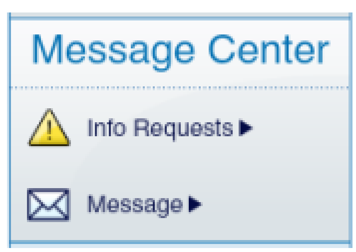
Panel Navigation

Use the left panel to navigate the Plan Advisor application: Return to Home, Administrator (Only for Producer with Admin Rights), Request a Quote, Review Cases in Progress, Review Submitted Cases, Check Final Quotes, or Review Archived Cases.



Message Center <Future Release>

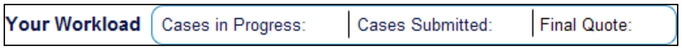
The Message Center is the communication center.



- **Info Requests** – Require immediate attention and action
- **Messages** – Email Messages

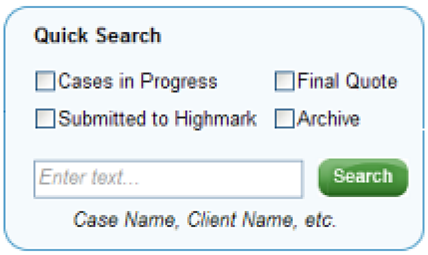
Your Workload <Future Release>

The Your Workload section provides a summary of Cases in Progress, Cases Submitted, and Final Quotes.



Quick Search Feature <Future Release>

The Quick Search feature, located in the top right corner of the home page, enables users to search for Cases in Progress, Cases Submitted to Highmark, Final Quotes or Archived Cases. User also has the ability to enter specific search criteria in the text box.



1. Click **checkbox** of desired results

   Or

   Enter **text**

2. Click **Search**

   The ***Search Results*** window appears

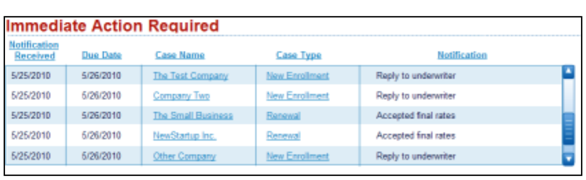
Immediate Action Required

The Immediate Action Required section provides a listing of cases that are time sensitive and require attention. Items are listed in order of time sensitivity. Information displayed in this section includes: due date, case name, case type (renewal – future release functionality or new enrollment) and the notification description.

To access case:

1. Click **Case Name**

   Note: Click **Column Header** to sort.



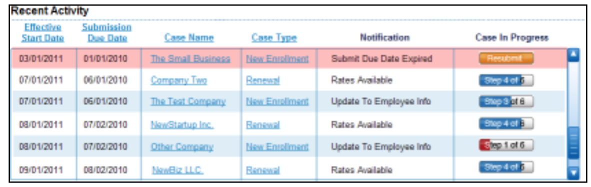
Immediate Action Required

Notification Received	Due Date	Case Name	Case Type	Notification
5/25/2010	5/26/2010	The Test Company	New Enrollment	Reply to underwriter
5/25/2010	5/26/2010	Company Two	New Enrollment	Reply to underwriter
5/25/2010	5/26/2010	The Small Business	Renewal	Accepted final rates
5/25/2010	5/26/2010	NewStartup Inc.	Renewal	Accepted final rates
5/25/2010	5/26/2010	Other Company	New Enrollment	Reply to underwriter

Recent Activity

The Recent Activity section provides a listing of the most recent cases worked. Case in Progress indicator keeps you informed on case progress.

1. Click **Case Name**



Recent Activity

Effective Start Date	Submission Due Date	Case Name	Case Type	Notification	Case In Progress
03/01/2011	01/01/2010	The Small Business	New Enrollment	Submit Due Date Expired	Resubmit
07/01/2011	06/01/2010	Company Two	Renewal	Rates Available	Step 4 of 6
07/01/2011	06/01/2010	The Test Company	New Enrollment	Update To Employee Info	Step 3 of 6
08/01/2011	07/02/2010	NewStartup Inc.	Renewal	Rates Available	Step 4 of 6
08/01/2011	07/02/2010	Other Company	New Enrollment	Update To Employee Info	Step 1 of 6
09/01/2011	08/02/2010	NewBiz LLC.	Renewal	Rates Available	Step 4 of 6

Note: Suspended cases are indicated by a red progress bar, e.g. if the submission due date expired.

Section 1 – Request Quote

Basic Info

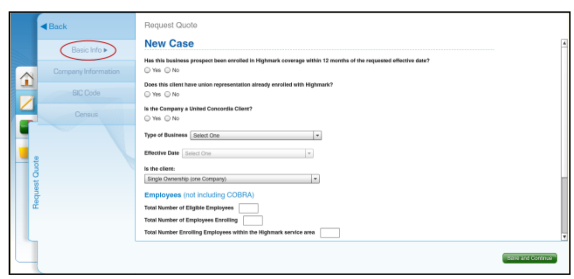
Request Quote steps remain the same, enter:

- Basic Information
- Company Information
- SIC Code
- Census

  Note: These tabs appear on the left side of the Request Quote window.

1. Click **Request Quote**

   The ***New Case*** page appears



2. Enter data
3. Click **Save and Continue**

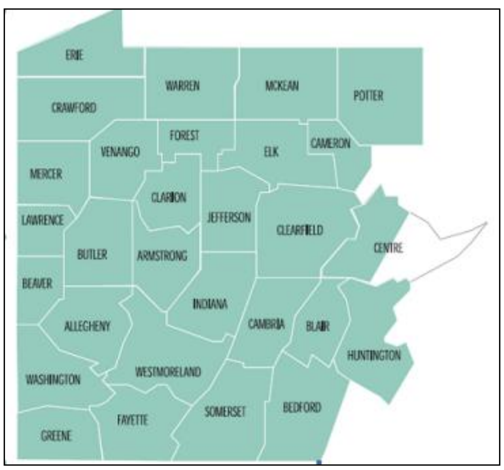
Company Information

The ***Company Information*** window appears

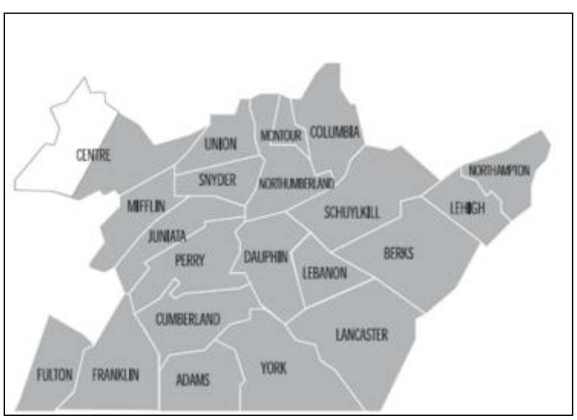
1. Enter **Company Name**
2. Enter **Zip Code**, county will populate

   Note: If Zip code is shared between counties, select appropriate county from the dropdown. These maps have been provided as a reference and **are not** part of Plan Advisor.

In Area Western Region



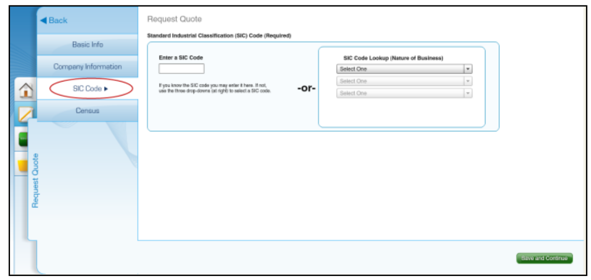
In Area Central Region



3. Enter **Contact Information**, optional
4. Select **Current Carrier** from dropdown
5. Click **Save and Continue**

SIC Code

The ***SIC Code*** window appears



1. Enter **SIC Code**

   Or

   Select **SIC Code** using all three dropdowns

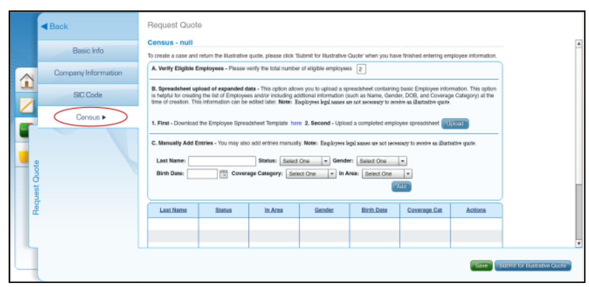
   Note: Cannot proceed without valid SIC code.
2. Click **Save and Continue**

Census – Upload

The ***Census*** window appears

Note: Follow process used today.

1. Section A – Verify Eligible Employees



2. Section B - Click **Here** (Download the Employee Spreadsheet Template)

   Note: There's been a modification to the Template, the last column now indicates In Area rather than Out of Area.

   Or

   Click **Upload** to upload a Census.xls file

The ***Census listing*** window appears

Last Name	Status	In Area	M/F	DOB	Coverage Cat	Actions
Employee 1	Active	Y	M	5/01/1955	Two Person	
Employee 2	Active	Y	F	5/01/1955	Individual	

Edit or **Delete** records using Action Icons

Key: Edit Delete

Note: Table edits are completed in Section C.

3. Click **Submit for Illustrative Quote**

Submit for Illustrative Quote

Census – Manually Add

In Section C, add entries manually or edit Census entries.

Note: Employees' last names are not necessary to receive an illustrative quote.

1. Enter **Last Name,** optional
2. Select **Status** (Active, COBRA)
3. Select **Gender**
4. Enter **Date of Birth** (MM/DD/YYYY)
5. Select **Coverage Category** (Individual, Family)
6. Select **In Area** (Yes, No)
7. Click **Add**

Add

The ***Census listing*** window appears

Last Name	Status	In Area	M/F	DOB	Coverage Cat	Actions
Employee 1	Active	Y	M	5/01/1955	Two Person	
Employee 2	Active	Y	F	5/01/1955	Individual	

Edit or **Delete** records using Action Icons

Key: Edit Delete

8. Click **Submit for Illustrative Quote**

Submit for Illustrative Quote

The ***Illustrative Quote*** window appears

Illustrative Quote Process – Medical, Dental, Vision Selection(s)

The Illustrative Quote page displays an individual tab for Medical, Dental, Vision, when appropriate. Two additional tabs Summary of Selections and Proposal Builder will help you to complete the Illustrative Quote process.

1. Click **checkbox** to the left of individual product listing to select **individual** products

   Or

   Click **checkbox** next to Product Information to select **all** products

   Product Information

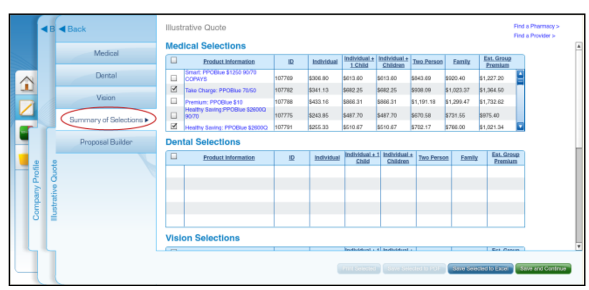
   Note: Click on **Product Name** for Product details.

2. After making product selections, your actions on this window include:
   - Print Selected
   - Save Selected to PDF
   - Save Selected to Excel

   Note: Only the **Save Selected to Excel** option is active at this time.

3. Click **Save and Continue**

   The ***Illustrative Quote Summary of Selection*** window appears



Illustrative Quote Summary of Selections

This window provides a Summary of Selections to include in your Proposal.

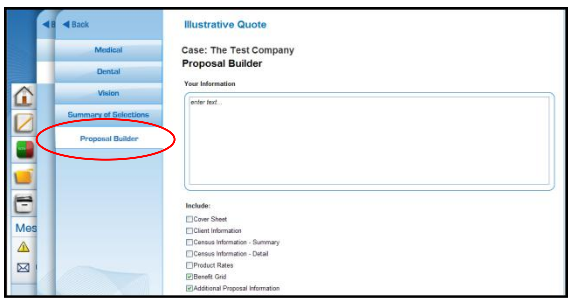
Options from this window include:

- Print Selected
- Save Selected to PDF
- Save Selected to Excel

Note: Only the **Save Selected to Excel** option is active at this time.

1. Click **Save and Continue**

The ***Illustrative Quote Proposal Builder*** window appears



Illustrative Quote Proposal Builder

This window displays the Illustrative Quote Proposal Builder.

Options from this window include:

- Print Selected
- Save Selected to PDF

Note: Only the **Save Selected to PDF** option is active at this time.

1. Click **Continue to Company Profile**

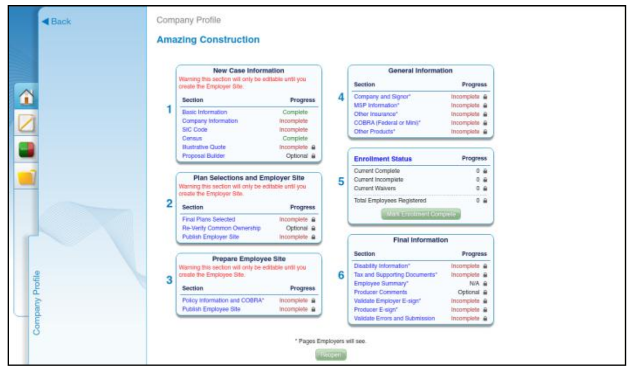
The ***Company Profile*** window appears

Note: The Company Profile displays all six (6) Sections associated with the Case, along with your progress while completing the steps within each section.

Section 2 – Plan Selections and Employer Website

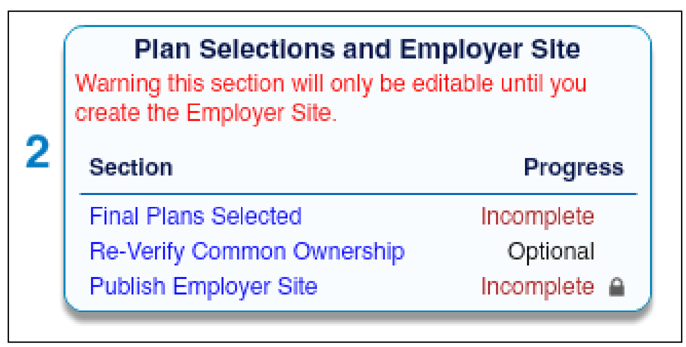
Once the case has been entered, multiple parties have the ability to update the case. As a Producer, you may choose to complete some or all of the six sections shown below. However, you will be responsible for completing Sections one, two, three and six, as applicable.

Note: Sections/Steps **must be** completed sequentially!



Plan Selections and Employer Website

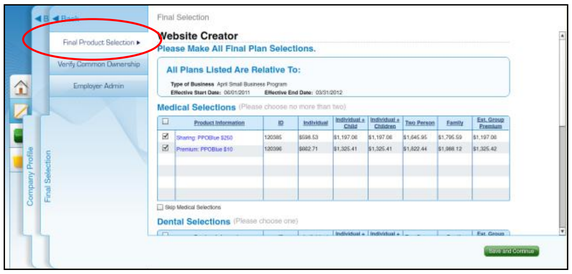
As a Producer you will be **required** to complete Final Plans Selection and Publish Employer Site; Re-verify Common Ownership is optional. This section is not available to an Employer.



You will work with the Employer to pick Medical, Vision, Dental products and make the final selection(s).

1. Click **Final Plans Selection**

The ***Website Creator*** window appears



Note: Click on **Product Name** for Product details.

2. Click in the **box** to the left of individual product listing to select **individual** products

   Or

   Click in the **box** next to Product Information to select **all** products

Note: Click on **Product Name** for Product details. If Employer doesn't want any of the products showing in the window:

- Click **Back** 

to return to Section 1 – Illustrative Quote
- **Reselect** products

  Or

- Select **Skip Selection** to continue

3. Click **Save and Continue**

   The ***Re-verify Common Ownership*** window appears

1. Click the **appropriate radio button** to re-verify ownership
2. Click **Save and Continue**

   The ***Employer Admin Tab window*** appears

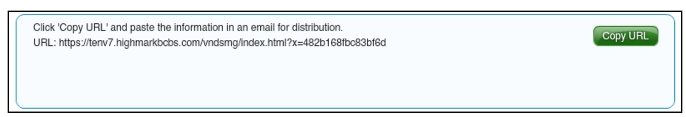
1. Enter **Contact Name**
2. Enter **Email**
3. Enter **Telephone number/extension**

   IMPORTANT: Before clicking the Activate Employer Site button, confirm all data is correct. Edits cannot be made; you will need to start the process all over from the beginning!

4. Click **Activate Employer Site**

Publish Employer Site

The Website Creator screen refreshes and generates a link to a website specific to and to be used solely by the Employer. As a Producer you have the choice to continue to fill in the employer information using Plan Advisor under your Producer Portal Login ID or provide the link to the Employer.



To provide the link to the **Employer**:

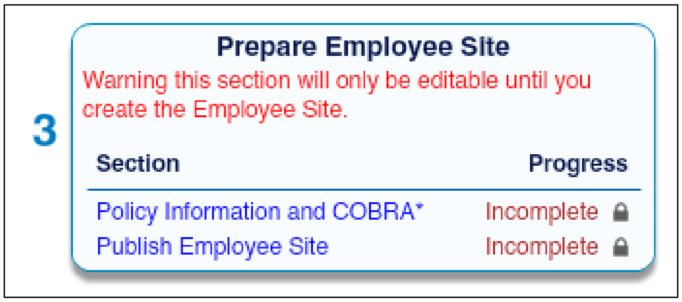
1. Click **Copy URL**

2. Go to your Email and paste the link into an Email message addressed to the Employer
3. Send Email to Employer
4. Click **Continue to Company Profile**

Section 3 – Prepare Employee Site

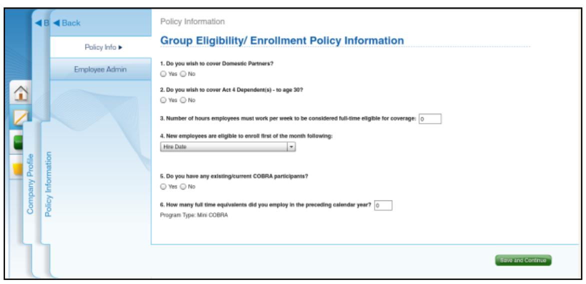
Prepare Employee Site, is a Producer/Employer page. This can be completed by the Producer or Employer.

Note: This section must be complete before employees begin the enrollment process.



1. Click **Policy Information and COBRA**

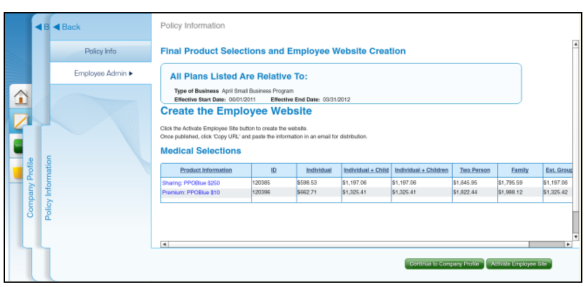
   The ***Group Eligibility/Enrollment Policy Information*** window appears



The questions appearing on this window will drive the questions that Employers/Employees must complete.

1. Answer all questions
2. Click **Save and Continue**

   The ***Final Product Selection and Publish Employer Site*** window appears



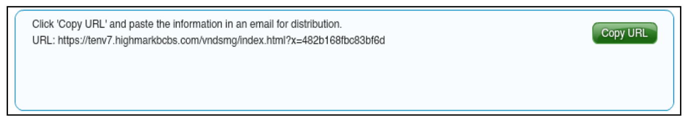
3. Review Final Product selections

IMPORTANT: Before clicking the Activate Employee Site button, confirm all data is correct. Edits cannot be made; you will need to start the process all over from the beginning!

4. Click **Activate Employee Site**

Publish Employee Site

The Website Creator screen refreshes and generates a link to a website specific to and to be used solely by the Employee. As a Producer you have the choice to continue to fill in the employee information using Plan Advisor under your Producer Portal Login ID or provide the link to the Employer who can distribute the URL to the Employees.



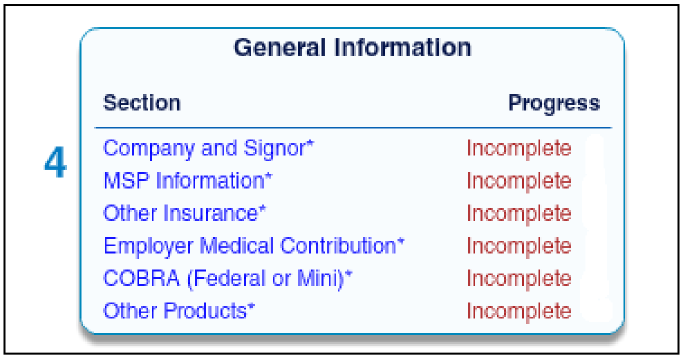
To provide the link to the **Employee Link to the Employer**:

1. Click **Copy URL**
2. Go to your Email and paste the link into an Email message addressed to the Employer
3. Attach the **Employee Quick Reference Guide** to the Email
4. Send Email to Employer
5. Click **Continue to Company Profile**

Section 4 – General Information

The General Information section captures Company Information, Other Insurance, Employer Medical Contribution, COBRA and Mini-COBRA and Other Product Information.

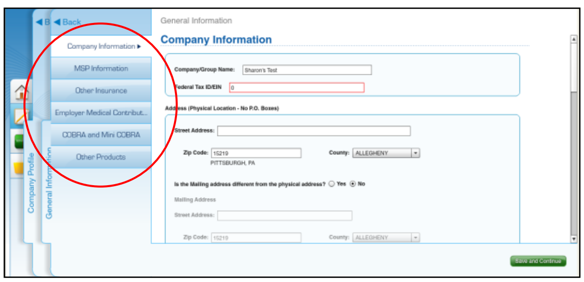
Note: This Section can be completed by the Producer or the Employer.



Update Company Information

1. Click on Company and Signor

   The ***Company Information*** screen appears



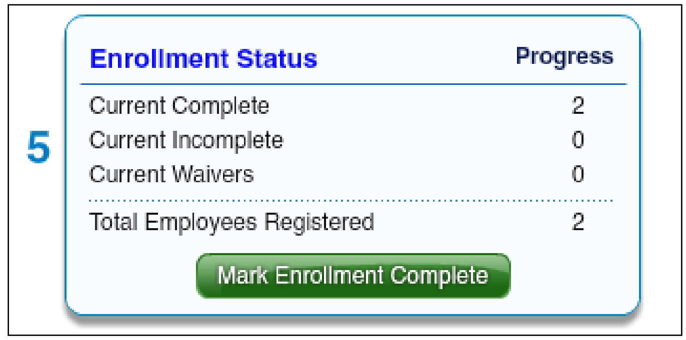
2. Complete information on the following screens:
   - Company Information
   - MSP Information
   - Other Insurance
   - Employer Medical Contribution (Only displays if selecting a Medical Product)
   - COBRA and Mini COBRA
   - Other Products
3. Click **Save and Continue** on **each** screen

   The ***Company Profile*** window appears

Section 5 – Enrollment Status

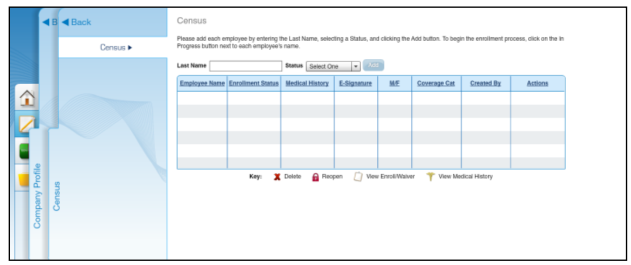
The Enrollment Status window displays the number of complete, incomplete applications and also indicates employees who have waived coverage.

Note: It includes all employees that have registered via the Employee site, as well as, any applications that the Employer and/or Producer started.



1. Click **Enrollment Status**

   The ***Census*** window appears

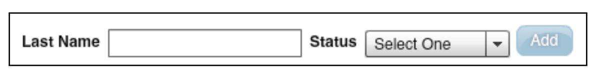


The Producer, Employer or Employee will be able to enter Enrollment information. Producer and Employee are able to enter Medical History information.

Note: Employers will not be able to enter, edit, or view Medical History.

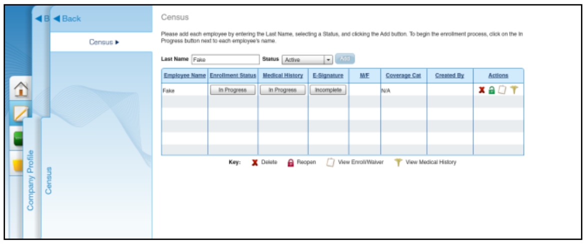
Add Employees – Producer or Employer is Providing Enrollment Information

1. Enter Last **Name**



2. Select **Status** from dropdown
3. Click **Add**

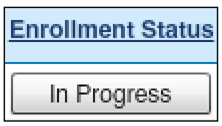
4. **Repeat** for each employee
5. This page summarizes everyone on the Census at a quick glance and displays individual progress, as well as, employee gender and coverage (individual, family, etc.)



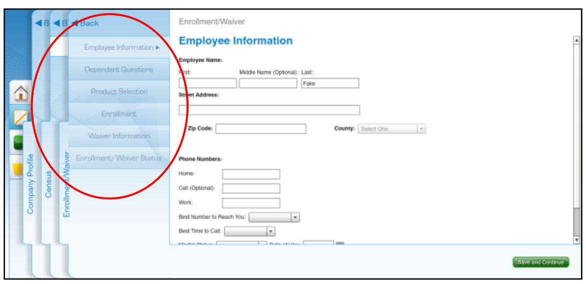
Delete, **Reopen**, **View/Enroll Waiver**, **View Medical History** records using Action Icons

Complete Enrollment Status

1. Click **In Progress**



The ***Employee Information*** window appears



2. Complete the information on the following screens:
   - Employee Information
   - Dependent Questions
   - Product Selection
   - Enrollment
   - Waiver Information
   - Enrollment/Waiver Status
3. Click **Save and Continue** on each screen

Complete Medical History

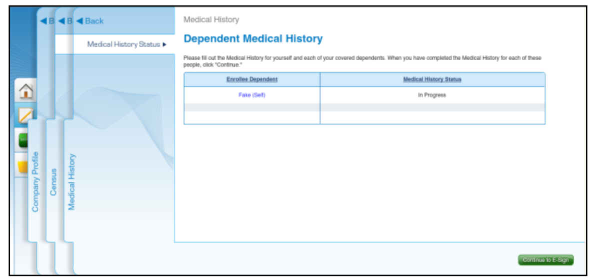
Note: If the employee does not have access to a computer, the Producer can enter Medical History on their behalf.

Save and Continue from the last page of Enrollment will direct you to the Medical History page.

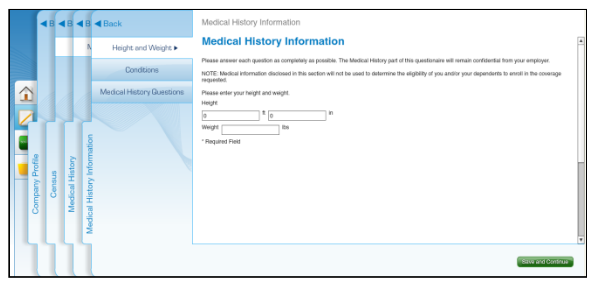
Or

1. Click **In Progress**

The ***Dependent Medical History*** window appears



2. Click desired **Employee Name**



3. Complete the information on the following screens:
   - Height and Weight
   - Conditions
   - Medical History Questions
4. Click **Save and Continue** on each screen
5. Click **Continue to E-Sign**

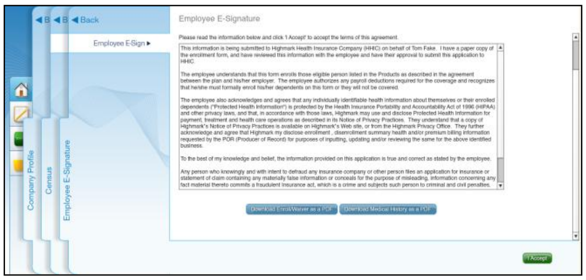
Complete Electronic Signature

Save and Continue from last page of Medical History will direct you to the E-Sign page.

Or

1. Click **Incomplete**

The ***Employee E-Signature Terms*** window appears

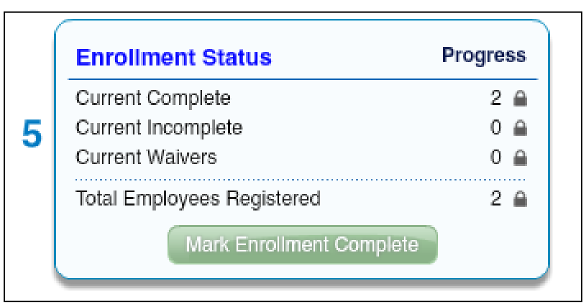


1. Click **I Accept**

Note: This completes the employee's enrollment process.

Once the Producer/Employer verify that all employee data has been entered:

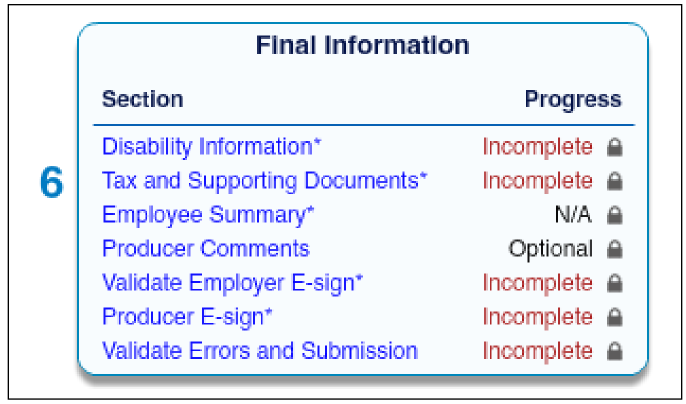
1. Click **Mark Enrollment Complete**



Section 6 – Final Information

Prepare for Submission to Highmark

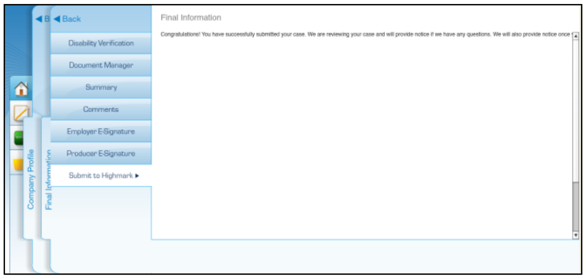
This is the final step in the process.



1. Click **Disability Information**
2. Complete the information on the following screens:
   - Disability Verification (If table is blank, there are no disabled employees)
   - Document Manager (Must upload a PDF of all necessary documentation, e.g. tax documents)
   - Summary (Automatically completed – View Only)
   - Comments (Optional to provide comments to Highmark once the case is submitted)
   - Employer E-Signature (Only needs to be completed by Producers if signing on the behalf of the Employer)
   - Producer E-Signature

     Note: Western enters Producer Number, Central enters Agency ID.
3. Click **Save and Continue** on each screen
4. Click **Submit**

The ***Final Information confirmation*** window appears



Note: If you receive a failed validation message, you **must** correct the items before your case can be submitted. See ‘How to Edit Locked Information’.

How to Edit Locked Information

Prior to submitting the case to Highmark, the Producer can Reopen and edit Sections 4, 5, and 6, as necessary.

From the Company Profile:

1. Click **Reopen**

Note: This will void Producer/Employer E-Signatures so another E-Signature will be required.

If edits need to be made to Employee Information:

1. Click **Enrollment Status** – Section 5
2. Click **Red Lock** icon

Note: This will void the Employee E-Signature so another E-Signature will be required.

Cases in Progress

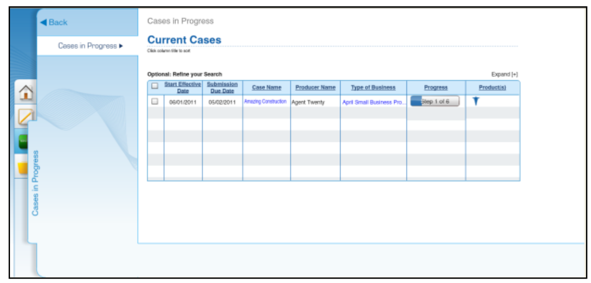
Review Cases

As a Producer you may need to see all of your Cases in Progress.

To review Cases in Progress:

1. Click **Cases in Progress**

The ***All Cases in Progress*** window appears

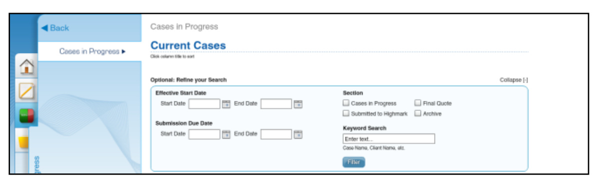


This window provides: Case Effective Start Date, Submission Due Date, Case Name, Producer Name, Type of Business, Progress, and Product(s) selection.

Search Options <Future Release>

Users also have the ability to perform a more advanced search by using **Optional: Refine Your Search**.

1. Click Expand **[+]**



The ***Refine Your Search*** window appears

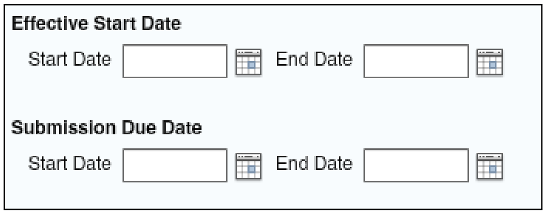
Date Search <Future Release>

Search either by Effective or Submission Date.

1. Enter **Effective Start Date** and **End Date**

Or

Enter **Submission Due Date; Start and End Date**



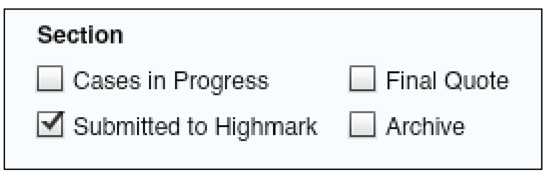
2. Click **Filter**

Cases that match the criteria appear on the bottom half of the screen.

Section Search <Future Release>

User has the ability to search one or all types of cases.

1. Click **checkbox(s)** of desired cases



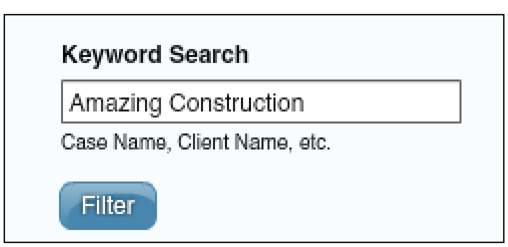
2. Click **Filter**

Cases that match the criteria appear on the bottom half of the screen.

Key Word Search <Future Release>

Keyword Search feature enables users to search for Cases in Progress, Cases Submitted to Highmark, Final Quote or Archive Cases. User also has the ability to enter specific search criteria in the text box.

1. Enter **text**



2. Click **Filter**

Cases that match the criteria appear on the bottom half of the screen.

Submitted to Highmark

Review Cases

As a Producer you may need to see the cases that you have submitted to Highmark.

To review Submitted Cases:

1. Click **Submitted to Highmark**

   The ***Submitted to Highmark*** window appears

   This window provides you with the Case Effective Start Date, Submission Due Date, Case Name, Producer Name, Type of Business, Progress, and Product(s) selection.

Search Options <Future Release>

Note: The Case Search options for **Submitted to Highmark** work exactly the same as those for **Cases in Progress**.

Administrator

Administrators are able to see all cases related to their agency and they have rights to make edits to any of those cases. They also have rights to assign other Producers to a case. In Central, Preferred Agencies can see all cases within their agency, as well as, assign a Standard Agent to a case.

Note: Producers without Admin rights will only see cases that have originated by and are assigned to them.

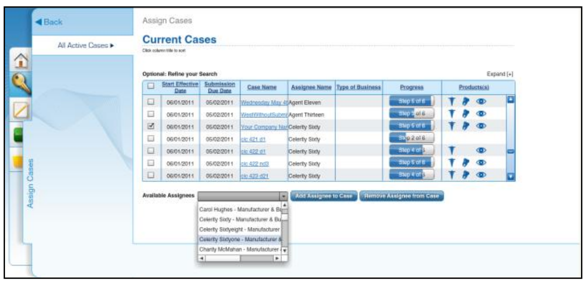
Add Assignee to Case

Administrator Producers can add a new Producer to a case in the event someone goes on vacation, wants to redistribute the work, etc.

1. Click **Administrator**

The ***Assign Cases*** window appears

2. Click **checkbox** of desired case



3. Select **desired agent** from Available Assignee dropdown

4. Click **Add Assignee to Case**

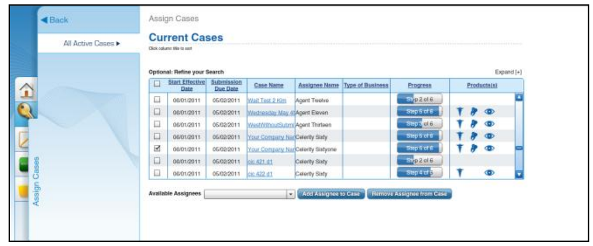
Remove Assignee from Case

Just as Administrator Producers can add a Producer, they also have rights to remove a Producer, e.g. someone leaves the agency.

1. Click **Administrator**

   The ***Assign Cases*** window appears

2. Click **checkbox** of desired case



3. Click **Remove Assignee** from Case