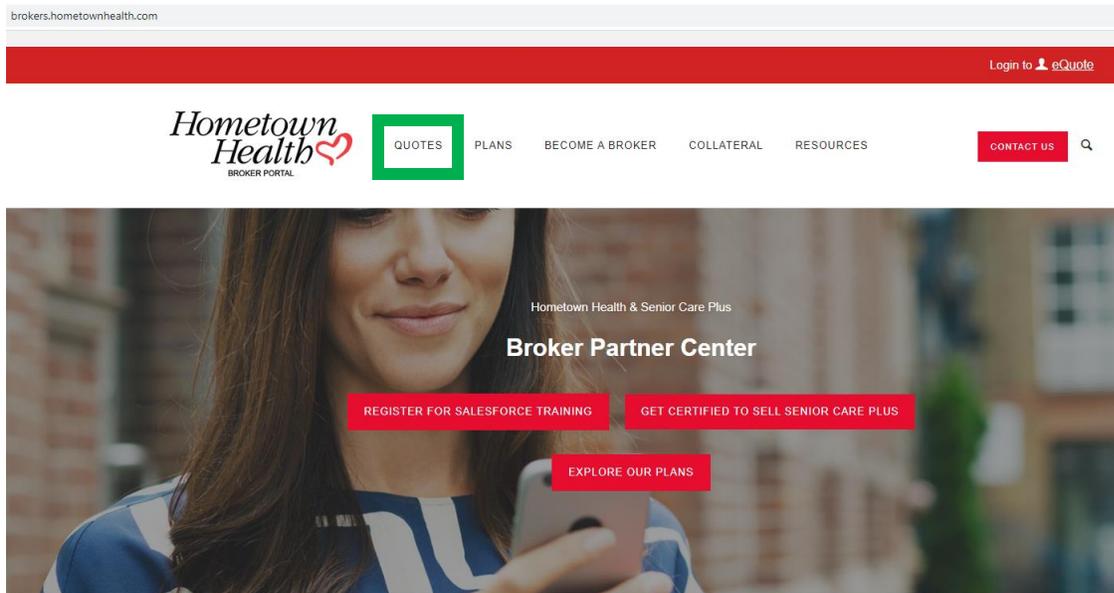


HOW TO QUOTE A SMALL GROUP

Begin by logging into the Hometown Health Broker Portal. You can log in directly to <https://brokers.hometownhealth.com/>, or you can select “Brokers” on the main Hometown Health website. Select **Quotes**.



Broker Support

Select **Login to Salesforce**.



Explore our Quoting Tools

We work with you to make it easy to bring employer groups, individuals & families, and Medicare recipients to Hometown Health.

Our Quoting Engines

Salesforce

Salesforce is our new quoting system for commercial sales and renewals with effective dates starting 01/01/2022.

[LOGIN TO SALESFORCE](#)

eQuote

eQuote is our quoting engine for commercial sales and renewals with effective dates before 01/01/2022.

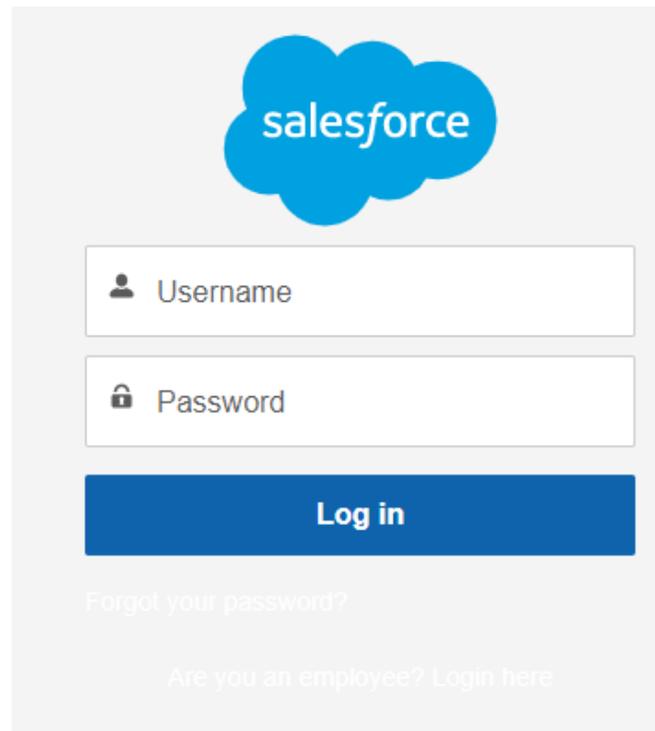
[LOGIN TO EQUOTE](#)



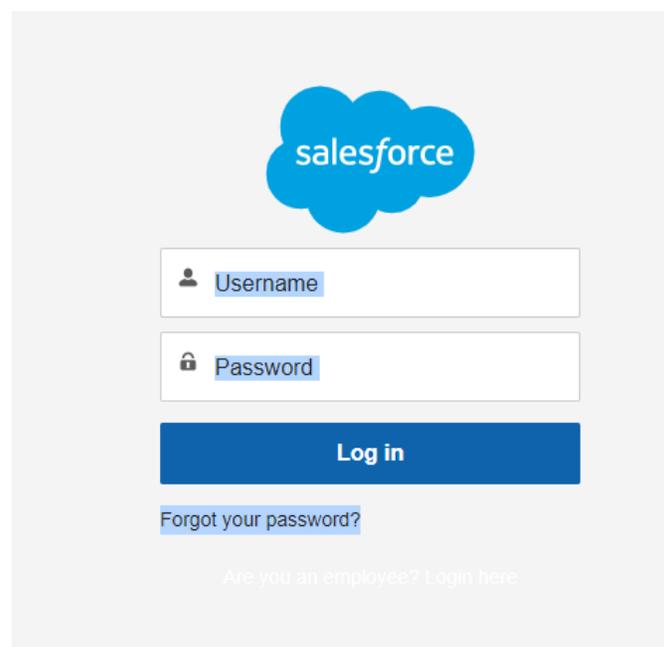
Work from anywhere, our tools make it easy for brokers to manage their business. From small group to large group and individual plans, login to our quoting tool to manage your plans with us. [Become a Broker](#)



HOW TO QUOTE A SMALL GROUP



A screenshot of the Salesforce login page. At the top is the Salesforce logo, a blue cloud with the word "salesforce" in white. Below the logo are two input fields: "Username" with a person icon and "Password" with a lock icon. A blue "Log in" button is positioned below the fields. Underneath the button, the text "Forgot your password?" is visible in a light grey font. At the bottom, there is a link that says "Are you an employee? Login here" in a light grey font.



A second screenshot of the Salesforce login page, identical to the first but with blue highlights. The "Forgot your password?" link and the "Are you an employee? Login here" link are highlighted with a light blue background to draw attention to them.

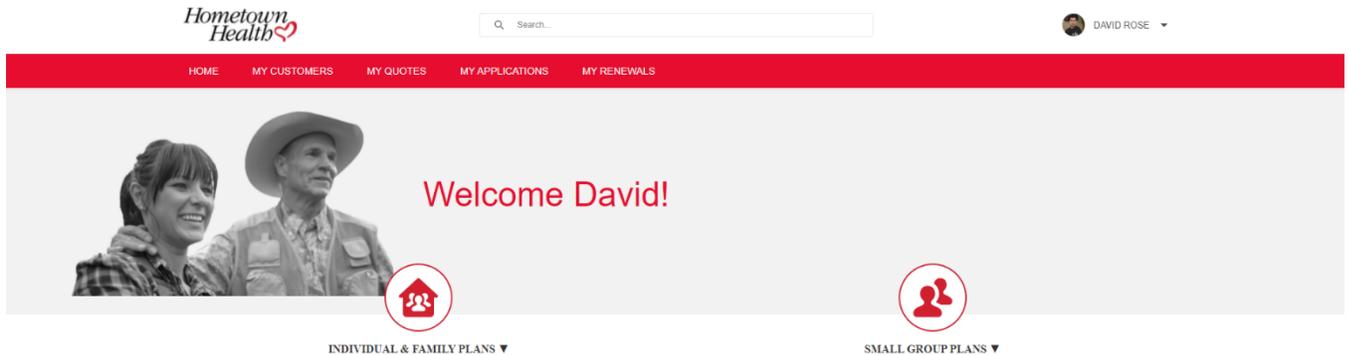
Currently this is difficult to see, as white font on grey background, and will be fixed as soon as possible.

We have highlighted this above so that you can more easily see where the "Forgot your password?" is.



HOW TO QUOTE A SMALL GROUP

This will bring you to your Broker Salesforce page.



Step 1

Click on **Small Group Plans** and select **New Quote**.



SMALL GROUP PLANS ▼



SMALL GROUP PLANS ▼

New Quote



HOW TO QUOTE A SMALL GROUP

Step 2

Enter all needed information which is denoted by an * and then select next.

Name of business*
Test Business

Physical Address
10315 Professional Circle, Reno, NV, USA

Physical Street*
10315 Professional Circle

Physical City*
Reno

Zip Code, County & State*
89521 - WASHOE - NEVADA

Zip Code 89521	County WASHOE	State NEVADA
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Number of eligible employees*
10

NAICS Code (Optional)

Effective Date*
10/01/2021

*Are you currently, or eligible to join, a common purpose association that is affiliated with Hometown Health?

<input type="checkbox"/> Yes	<input checked="" type="checkbox"/> No
------------------------------	--

Next



HOW TO QUOTE A SMALL GROUP

Step 3

You can do one of three things here:

We will go over each option so please scroll until you find the option you are going to use! The color of the text matches the bubble of the text.

1. Download the template and enter employee information
2. Click **Add Employee** and enter employee information
3. **Upload your own template** and click on **Upload Members** to upload your template

Option 1
Step 1

Click on **Download Template**.



Employer Census

Upload an employee census file or add employees individually.

Download Template

Option 1
Step 2

It will appear at the bottom of your screen, click on it and it will open an Excel spreadsheet. Fill out the necessary information and save the document.

Renown_CPQ_Cen....xlsx



HOW TO QUOTE A SMALL GROUP



Information **needed** when filling out the spreadsheet:

Date of Birth:

The date of birth must be formatted YYYY-MM-DD

1. Y = 4 digit year of birth
2. M = 2 digits associated with birth month, if January through September, please add a zero to make it two digits
3. D = 2 digit day, please add a zero to the beginning of the day if your members were born on the 1st through the 9th (ie. 07)

Gender:

Can only be Female and Male

Postal Code:

5 digit zip code

Employment Type:

You can have any of the following, but they must match the system exactly:

1. Active
2. COBRA
3. Part Time
4. Retired
5. Waiting Period
6. Waiving

Applicant Type:

Please assign one of the following, but as noted above it must match exactly:

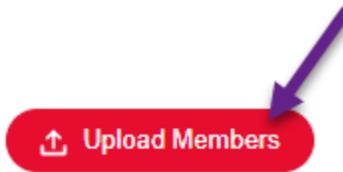
1. Employee Only
2. Employee and Spouse
3. Employee and Domestic Partner
4. Employee and Child (ren)
5. Employee, Spouse, and Child(ren)
6. Employee, Domestic Partner, and Child(ren)



HOW TO QUOTE A SMALL GROUP

Option 1
Step 3

Select **Upload Members** and upload your Excel document.



Option 2
Step 1

Select **Add Employee**.



Option 2
Step 2

Select the > to drop down the part where you will enter employee information. All needed information will be denoted with a *.

Employee 1
Mickey Mouse 0 dependents

Details

First Name Mickey	Last Name Mouse	Birthdate Jul 1, 1985	Gender* Male	Email
Postal Code	Applicant Type --None--	Employment Classifi... Active		



HOW TO QUOTE A SMALL GROUP

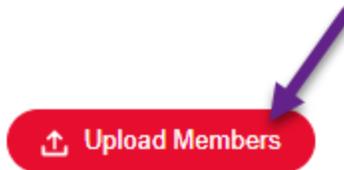
Option 2
Step 3

Once you have entered the required information, select the save button.



Option 3
Step 1

Select Upload Members and upload your own excel template.



Option 3
Step 2

Select the Next button at the bottom of the screen.



Option 3
Step 3

Select the coverage options by click on the icons and making sure they're highlighted in **Orange**.



HOW TO QUOTE A SMALL GROUP

Option 3
Step 4

Once you have chosen your coverage options, click **Next** at the bottom of the screen.



Option 3
Step 5

To compare the plans, you will select the Compare button on the plans you would like to compare.

A screenshot showing two insurance plan cards. Each card has a 'Compare' button with a checkmark icon, highlighted by a purple box and arrow. The first plan is '21 SG PPO 45-NA 0000 P D8550X2' with a price of '\$357.75/mo'. The second plan is '21 SG PPO 10-70 CINS U D1400X2 HSA' with a price of '\$374.49/mo'. Both cards also feature a '+ Add to Cart' button.

21 SG PPO 45-NA 0000 P D8550X2		
PCP CO-PAY \$65	SPECIALIST CO-PAY \$130	DEDUCTIBLE \$8,550
INPATIENT HOSPITAL BENEFIT CYD, \$0	OUT OF POCKET MAXIMUM \$8,550	TYPE Commercial

21 SG PPO 10-70 CINS U D1400X2 HSA		
PCP CO-PAY CYD, \$30	SPECIALIST CO-PAY CYD, \$60	DEDUCTIBLE \$1,400
INPATIENT HOSPITAL BENEFIT CYD, 30%	OUT OF POCKET MAXIMUM \$7,000	TYPE Commercial

Option 3
Step 6

Once you have selected the plans you would like to compare, scroll back to the top and click on **Compare**.



HOW TO QUOTE A SMALL GROUP

Option 3
Step 7

During your comparison of the plans, you can select the one that you have chosen by selecting the **Select** button at the top of the compare screen. Once you have done that, you can click the **X** in the corner.



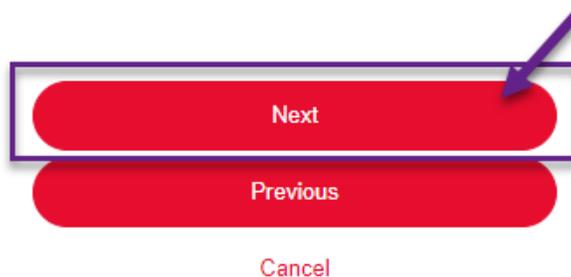
Option 3
Step 8

You will see the plan you have selected added to your cart at the top of the screen.



Option 3
Step 9

If you have chosen to add Vision to your quote, you will click **Next** at the bottom and *follow the same process as choosing a medical plan to choose a vision plan.*



HOW TO QUOTE A SMALL GROUP

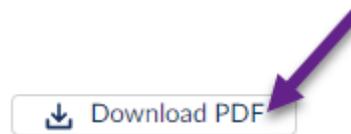
Option 3
Step 10

After adding vision to your plan, click **Next** at the bottom to view your quote.



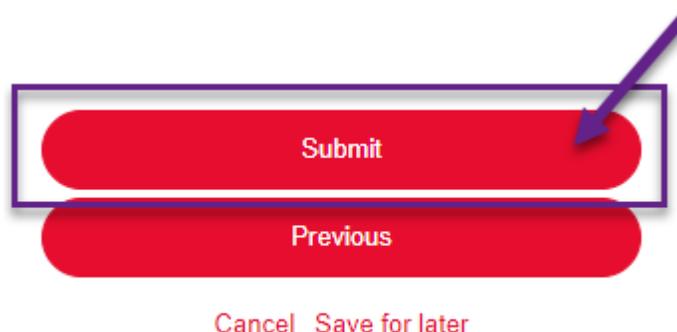
Option 3
Step 11

Now that you have your quote, you can download the PDF version by clicking **Download PDF** in the right hand corner.



Option 3
Step 12

Once you are completed, you may click the **Submit** button at the bottom to complete your quote and submit your application.



HOW TO QUOTE A SMALL GROUP

Option 3
Step 13

You will see the confirmation of your application being successfully submitted. Once you see this, you can click on **Close**. You have completed a quote of a Small Group.

