



Build a proposal that showcases strategic options for your customers

You can control your proposal output to present plan considerations for your customer and simplify their decision-making experience.

Follow the steps below to build a stronger proposal and help the customer see immediate, meaningful options to offer to their employees for the new plan year.

Step 1: Select plans

1. Use the filter options available on the left side of the screen to narrow medical plan selections
2. Use the heart icon to favorite plans that you find beneficial to show to your customers most often. When you filter for favorites, they will be at the top of your list.
3. You can filter and/or build favorites on all products you want the employer to consider: Medical, Dental, Vision and Life plans
4. Select plans to display on your proposal by clicking on the **Select** box in the bottom, right corner of the plan

The screenshot shows the United Healthcare plan selection interface. It includes a sidebar with filters (1), a top navigation bar with product types (2), a list of plans (3), and a detailed view of a specific plan (4). The interface is designed to help users narrow down plan selections and choose the best options for their proposal.

1 Filter

2 Product Types

3 All Plans

4 Plan Details

Step 2: Generate proposal

5. Select the **Generate Proposal** button in the bottom right of the screen. A pop up will provide the option for a Summary Proposal or a Detailed Proposal.
 - a. A Summary Proposal is geared to a customer view and is simplified to make it easier for them to review the proposal
 - b. A Detailed Proposal is geared more toward our broker partners to all of the details are at your fingertips as you walk through the plan options with the customer. Once plan options are narrowed down, it's recommended to generate a detailed proposal output for a comprehensive overview.

The screenshot shows the UnitedHealthcare Freedom plan selection interface. On the left, there are filters for OOP Max (\$0 - \$8300), Premium (\$0 - \$8800), Lab/X-Ray Benefits (Lab/X-Ray 100% (72), Lab/X-Ray Ded-Coins (48)), Prescription Drug List (Advantage (118)), and Product Category (Traditional - EPO UHC Freedom (48), HSA - EPO UHC Freedom (13), HSA - PPO UHC Freedom (13), Traditional - PPO UHC Freedom (48)). The main area displays two plan options: UHCFrE01575LX23B and UHCFrE1000100LX23B, both with a PCP Required status. The first plan has a monthly cost of \$6,699.16 and the second has a monthly cost of \$6,158.85. A 'Generate Proposal' pop-up is overlaid on the right, showing the 'Generate Proposal' button and the 'Proposal Type(s)' section with 'Summary Proposal' selected. A blue circle with the number '5' is placed over the 'Generate Proposal' button in the bottom right corner of the main interface.

Tips for generating proposals

1. EPO and PPO plans with minor Lab and X-Ray with a deductible then coinsurance option have lower rates than plans with minor Lab and X-Ray with a 100% option. Your proposal must have one or the other, not both. You can create a second proposal if you want your customer to see both options.
2. The Prescription Drug List options include either Essential or Advantage plans. Your submission must include one or the other, not both.
3. Proposals cannot be generated when unlocked for changes or if the quote is with encoding/underwriting. Check the Case Status before generating the proposal.
4. Unable to add Agency/Broker/GA? Ensure you are searching in correct field. Broker must be licensed for the effective date, product and state you are quoting. If they are not, you will be unable to quote for them until that information is sent to Broker Commissions.

Important Reminders

Proposals cannot be generated when unlocked for changes.

If 100's of plans are being quoted, it is best not to include the optional documents in the proposal as the file will potentially be too large to generate.