Enjoy **Quick and Easy Quoting** for your Small Groups

Online Quoting through InTouch for Agents at PacificSource.com

PacificSource offers appointed agents the ability to generate online insurance quotes for Oregon SEHI groups with 4 to 25 enrolled employees.

What are the Advantages of Online Quotes?

It's easy. Online quoting is easy and intuitive. Our system prompts you for the correct information and answers your questions along the way.

It's fast. After you provide the necessary information, a full quote is automatically and instantaneously produced. There are no processing delays, making quote turnaround time faster than ever.

It's accurate. By allowing you to enter your client's complete census information, there's no chance for us to make data entry errors.

It's convenient. No matter where you are, your PacificSource quotes are available online.

It's flexible. Now you have a choice. You can request a quote online, or submit a paper Proposal Request—it's up to you.

It's efficient. Any time we can eliminate paper in our workplace, we are increasing efficiency and decreasing the burden on our environment.

How Can I Get Started with Online Quoting?

1. Log into InTouch for Agents.
2. Select the link for "Small Group Proposals."
3. You may choose to:
   - Quote a new client by selecting that option, or
   - Modify an existing client by selecting it from the list. Please note that only clients created online may be modified online.
4. Once you've entered the online quoting module, simply work through the required fields, correcting any errors along the way.
5. When you're finished, you may create a custom quote by selecting the plans of your choice for your custom "My Quote" proposal.

   By clicking on Full Quote you may obtain a printable complete proposal, which shows all options available through PacificSource.

Using "My Quote"

Sometimes your client can be overwhelmed with the many plan choices available from PacificSource.

The My Quote feature of InTouch for Agents can help you narrow down the choices for your clients. You can adjust employer contribution levels and see the impact on rates. You can also design a benefit package for the client's specific budget. Here's how it works:

1. Log into InTouch for Agents.
2. Click on the link for Small Group Proposals.
3. Choose the group for which you'd like to customize a proposal. The column at right, Date/Time Completed, can help you find the most current proposal for that client.
4. Once you've chosen a group, you will arrive on a page with the Employee Census Summary,

continued on reverse

PacificSource HEALTH PLANS

and several links to products quoted in their proposal. From here, select the product line from which you'd like to select specific plans.

For the purposes of this example, let's first go to the Preferred plans link. After a brief pause for downloading, you will arrive on a page that shows all the Preferred plans available to the group and the premiums for those plans.

5. At the top of the page is a section called Employer Contribution. If you change the amounts in the spaces for Employee Percentage and Dependent Percentage and click Calculate, the amounts in the Employer Contribution column below are adjusted accordingly. Keeping an eye on this column as you adjust the employee and dependent percentages will allow you to stay within your client's budget and explore other options if necessary.

6. Once you've found a plan that might meet the group's needs, click the corresponding "Add" button in the far left column. Doing so will add that specific plan to "My Quote," your customized proposal for the group.

   Choose as many plans as you like and add them to "My Quote." You can browse through Preferred, Choice, and Prime plans, and any of the optional benefit endorsements linked near the top of the page. All products available to the group will appear; if something doesn't show up, it's not available in that area or to groups of that size.

7. When you have completed your selections, click on the My Quote link near the top of the page.

   The My Quote Proposal Package lists all the plans you selected for presentation to the group. You can remove plans if you choose, or just click on one of the links above to keep "shopping" if you'd like to add more plans to your customized quote.

8. Once you are satisfied with your package, go back to the My Quote page and click on the link that says Printer-friendly PDF Version of This Quote. Doing so will allow you to print a paginated version to present to your client.

   If you decide you'd rather submit the full, original quote to your client, you can always click the Full Quote button.

If you are interrupted while compiling your quote and have to close your Web browser, don't worry! When you log back in and choose the same group, your proposal is automatically saved on the My Quote page. However, the Employee/Dependent Contribution amounts default back to 100 percent for employees and zero percent for dependents.

Questions or Technical Problems?

If you have any difficulties with PacificSource InTouch, you're welcome to call our Marketing Department. You can reach them by phone at (541) 686-1242 or toll-free at (800) 624-6052, or by e-mail at intouchforagents@pacificsource.com. You can also use the Contact Us form on our Web site to describe your problem. We'll look into it and follow up with you right away.

Using the My Quote tool can show your clients that you've thought about their specific needs, and it will make their selection process that much easier.

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Eugene:	541.686.1242 • 800.624.6052
Medford:	541.858.0381 • 800.899.5866
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