



BlueCross BlueShield

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Producer Experience Portal

Producer Experience Portal: IFM Quoting User Guide

Purpose:

The Producer Experience Portal enables producers to deliver plan information to clients and manage prospects. This section covers creating proposals and quotes for Individual and Family ACA medical and dental plans.

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Table of Contents

1.	Quote & Enroll Tab	3
2.	Create a New Quote	4 - 7
2.1.	Create a New Quote: Add an Applicant (Producer View)	4
2.2.	Create a New Quote: Add an Applicant (Delegate View)	5
2.3.	Create a New Quote: Add an Applicant	6 - 7
3.	View Plans: On/Off Exchange	8
4.	Compare Plans	9
5.	Tax Credit Estimator	10 - 11
6.	Review Page	12
7.	Access Saved Quotes	13 - 14
7.1.	Access Saved Quotes	13
7.2.	View Proposal	14
8.	Requote	15
9.	Remove/Update Spouse/Dependent	16
10.	Send Quote	17 - 22
10.1	Send Quote: New Quote	17 - 18
10.2	Send Quote: View Proposal	19 - 20
10.3	Send Quote: Review Plans	21 - 22

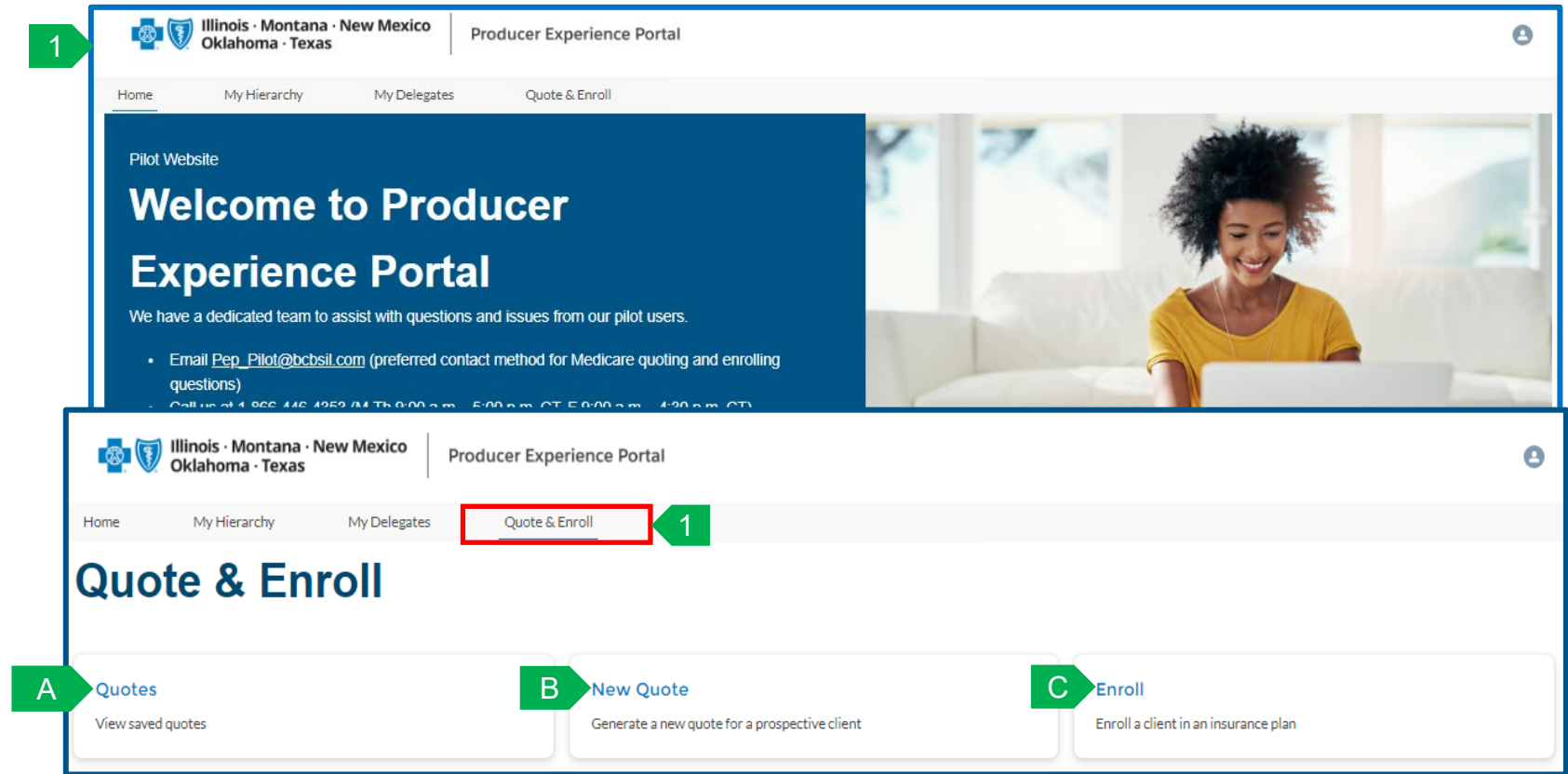
Quote & Enroll Tab

The Quote & Enroll section enables the user to:

- Provide accurate plan recommendations: Identify and present tailored medical and dental plan options that meet the client's needs.
- Streamline the enrollment process: Ensure a smooth transition from quoting to enrollment, minimizing errors and delays.
- Support compliance and accuracy: Maintain adherence to regulatory standards.

1. Click on the Quote & Enroll tab – **three** sections will appear:

- A. Quotes - View saved quotes
- B. New Quote - Generate a new quote for a prospective client
- C. Enroll - Enroll a client in an insurance plan



Create a New Quote: Add an Applicant (Producer View)

To begin, click on New Quote.

Add Primary Applicant Information

1. You can search by the applicant's first and last name, if applicant is an existing client. If selecting an existing client, the Primary Applicant Information will pre-populate and can be edited if updates are needed.
2. Enter all required fields marked with red asterisk for the client, if the applicant is a new client.
 - First Name
 - Last Name
 - Date of Birth (MM/DD/YYYY)
 - Effective Date (MM/DD/YYYY)
 - Phone Number (optional)
 - Email (optional)
 - Sex
3. Tobacco Use required if displayed for applicants ages 21+ as of effective date.
4. Begin typing the client's address in the Address Search field. Once the correct address is displayed, the user will select the address, and the mandatory fields will auto-populate.

NOTE: If an existing client was selected, the pre-populated address can be updated by either using the Address Search and selecting a new address or by selecting "Enter in address manually".

The screenshot displays the 'Producer Experience Portal' interface for 'Quote & Enroll'. The top navigation bar includes 'Home', 'My Hierarchy', 'My Delegates', 'Quote & Enroll', 'Commissions & Reporting', and 'Resources'. The 'Quote & Enroll' section features three buttons: 'Quotes' (with a sub-link 'View saved quotes'), 'New Quote' (with the sub-text 'Generate a new quote for a prospective client'), and 'Enroll' (with the sub-text 'Enroll a client in an insurance plan'). Below this is a progress bar and a section titled 'Applicant Information'. This section contains a 'Client Search' field (highlighted with a green box and labeled '1'), a 'Primary Applicant Information' form (highlighted with a red box and labeled '2'), and an 'Address Search' field (highlighted with a blue box and labeled '4'). The 'Primary Applicant Information' form includes fields for First Name, MI, Last Name, Date of Birth, Shopping Date, Effective Date, Phone Number, Email, Sex, and Tobacco Use. A red asterisk indicates required fields. A message 'Please enter an address to continue.' is displayed above the address search field.

Create a New Quote: Add an Applicant (Delegate View)

To begin, click on New Quote.

Add Primary Applicant Information

1. Begin typing the Writing Producer Number associated with the applicant's state and select the Writing Producer Number from the list.
2. You can search by the applicant's first and last name, if applicant is an existing client. If selecting an existing client, the Primary Applicant Information will pre-populate and can be edited if updates are needed.
3. Enter the required fields marked with red asterisk, if the applicant is a new client.
 - First Name
 - Last Name
 - Date of Birth (MM/DD/YYYY)
 - Effective Date (MM/DD/YYYY)
 - Sex
 - Tobacco Use (displayed if applicant is 21+ as of effective date)
 - Phone Number (optional)
 - Email (optional)
4. Begin typing the client's address in the Address Search field. Once the correct address is displayed, select the address, and the mandatory fields will auto-populate.

NOTE: If an existing client was selected, the pre-populated address can be updated by either using the Address Search and selecting a new address or by selecting "Enter in address manually".

*The Producer State and Primary Applicant State must match. Otherwise, they will receive an error message upon selecting **View Plans** button.*

The screenshot shows the 'Producer Experience Portal' interface for adding an applicant. The form is divided into several sections:

- 1. Producer Information:** A green box highlights the 'Writing Producer Number' dropdown, 'Producer Name', 'Company Name', and 'State' fields.
- 2. Client Search:** A green box highlights the 'Client Search' input field.
- 3. Primary Applicant Information:** A red box highlights the 'First Name', 'MI', 'Last Name', 'Date of Birth', 'Effective Date', 'Phone Number', 'Email', 'Sex', and 'Tobacco Use' fields.
- 4. Address Search:** A blue box highlights the 'Address Search' field and the 'Address', 'City', 'Zip Code', 'Apt/Suite', 'State', and 'County' fields.

At the bottom of the form, there are sections for 'Spouse' and 'Dependents', each with an 'Add' button. A 'Clear All' button and a 'View Plans' button are located at the bottom right.

Create a New Quote: Add an Applicant

Enter Address Manually

1. To enter an address manually, select the checkbox for Enter in address manually.

NOTE: Once the checkbox is selected, the Address Search will be disabled.

2. Enter the Address, City, State, and Zip Code to verify the address and to populate the County. Allow a few seconds for address verification.

3. If the address cannot be verified, you will have the option to:
A. Edit the address.
B. Use the suggested address.

Please enter an address to continue.

Address Search

Enter Address Here 1.Note

Enter in address manually

* Address Apt/Suite

* City * State

* Zip Code County

County will populate when a valid address is entered.

Address Not Found

Address entered is not a valid address. Please edit the entered address.

-Or-
Submit a paper application.

Entered Address:
200 East Randolph Street
Plano, TX, 60601

3 [Edit Entered Address](#)

Verify Your Address

Looks like we have found a better match for the address you have entered.

Entered Address:	Suggested Address:
200 East Randolph Street Naperville, IL, 60601	200 East Randolph Street Chicago, IL, 60601 Cook County

A [Edit Entered Address](#) [Use Suggested Address](#) B

Create a New Quote: Add an Applicant (continued)

Add Spouse and Dependent Information

- Once the Effective Date is populated, options to add a spouse and/or dependents will appear.

NOTE: Each client can have up to 19 dependents including a spouse.

- The user will select the **+ Add Spouse** and/or **+Add Dependent** button to add a spouse and/or dependent(s).

- Once the “+” sign has been selected, the user will populate the mandatory information for the applicant
 - Date of Birth
 - Sex
 - Tobacco Use (displayed if applicant is 21+ as of effective date)

NOTE: For Illinois (IL) applicants, the *Dependent Type* is also required. Please select the applicable dependent type: *Child, Parent, or Stepparent*.

- The **Cancel** button can be used to clear the applicant's information prior to being saved.
- Once the user has added an applicant and selected **Save**, the applicant's information will then be displayed.
- Additional dependents can be added by selecting the **+ Add Dependent** button.
- If there are no other dependents to add, the user clicks on **View Plans** to see matching plans.

The screenshots illustrate the following steps:

- Step 1:** The 'Quote & Enroll' page shows the '+ Add Spouse' and '+ Add Dependent' buttons highlighted with a red box.
- Step 2:** The 'Spouse' form is shown with fields for Date of Birth (01/01/2004), Sex (Male/Female), and Tobacco Use (Yes/No).
- Step 3:** The 'Dependents' list is shown with the '+ Add Dependent' button highlighted.
- Step 4:** The 'Spouse' form is shown with the 'Cancel' button highlighted.
- Step 5:** The 'Spouse' form is shown with the 'Save' button highlighted.
- Step 6:** The 'Dependents' list is shown with the '+ Add Dependent' button highlighted.
- Step 7:** The 'Dependents' list is shown with the 'View Plans' button highlighted.

View Plans: On/Off Exchange

- Plans allow the user to view matching plans. The default view will show Off Exchange Medical and Dental Plans. The user can click on the **On Exchange** tab to view On Exchange Medical and Dental plans.
- The user can apply filters to narrow down the matching plans.
- The user can access **Provider Finder**, **Dental Brochure**, or other future links in Quick Links section.
- The user can confirm Applicant, Dependent, and Producer Information by selecting appropriate tab. User can edit applicant and/or dependent information or navigate to previous page by selecting **Edit Information** button.
- The user can select **View Plan Details** to view or print plan benefits, prescription benefits, drug list, and/or Summary of Benefits.
- To compare plans, user can select up to (3) Medical **OR** Dental plans, then select **Compare Plans** button.
- Once the user has selected a plan(s), click **Review Selected Plans** to continue to the Summary page.

2 **Filters**

Sort By
Low to high premium

Range
Premium maximum
\$ Min \$ Max
Out of pocket max
\$ Min \$ Max
Annual individual deductible
\$ Min \$ Max
Co-insurance %
% Min % Max
PCP copay
\$ Min \$ Max

Product Type
 HMO
 PPO
 POS

Plan Type
 Major Medical
 Dental Only

Additional Features
 HSA Eligible
 Non-HSA Eligible

Metallic Level
 Bronze
 Silver
 Gold
 Catastrophic

Easy Pricing
 Yes
 No

3 **Quick Links**

[Provider Finder](#)
[Dental Brochure](#)

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Home My Hierarchy Quote & Enroll Reporting Resources News

4 Applicant Information | Dependent Information | Producer Information | [Edit Information](#)

Applicant Name: Off Exchange Enrollment | Address: 200 E Randolph St Chicago, IL 60601
DOB: 01/01/1978 | Phone Number: -
Sex: Male | Email Address: -
Tobacco Use: Yes | Effective Date: 01/01/2026
Dependents: 2

1 Plans | Off Exchange | On Exchange | Tax | **7** Review Selected Plans

Filters | Viewing 40 of 40 matching plans | **6** Compare Plans

Sort By: Low to high premium

Range: Premium maximum \$ Min \$ Max; Out of pocket max \$ Min \$ Max; Individual Deductible \$ Min \$ Max; Co-insurance % % Min % Max; Office Visit Copay \$ Min \$ Max

Product Type: HMO, PPO, POS

Plan Type: Major Medical, Dental Only

Additional Features: HSA Eligible, Non-HSA Eligible

5 View Plan Details

Available Off Exchange Medical Plans	Available Off Exchange Medical Plans												
<p><input checked="" type="checkbox"/> Select</p> <p>MyBlue Plus Bronze Standard - Select Rx Copays Monthly Premium \$1308.53</p> <p>5 View Plan Details</p> <table border="1"> <tr> <td>Coinsurance 50%</td> <td>Individual Deductible \$7500</td> <td>Individual Out-of-Pocket Maximum \$10000</td> </tr> <tr> <td>Network: MyBlue Plus POS</td> <td>Office Visit Copay \$50</td> <td></td> </tr> </table>	Coinsurance 50%	Individual Deductible \$7500	Individual Out-of-Pocket Maximum \$10000	Network: MyBlue Plus POS	Office Visit Copay \$50		<p><input checked="" type="checkbox"/> Select</p> <p>MyBlue Plus Bronze 903 Monthly Premium \$1348.49</p> <table border="1"> <tr> <td>Coinsurance 50%</td> <td>Individual Deductible \$4000</td> <td>Individual Out-of-Pocket Maximum \$9500</td> </tr> <tr> <td>Network: MyBlue Plus POS</td> <td>Office Visit Copay \$20</td> <td></td> </tr> </table> <p>View Plan Details</p>	Coinsurance 50%	Individual Deductible \$4000	Individual Out-of-Pocket Maximum \$9500	Network: MyBlue Plus POS	Office Visit Copay \$20	
Coinsurance 50%	Individual Deductible \$7500	Individual Out-of-Pocket Maximum \$10000											
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Network: MyBlue Plus POS	Office Visit Copay \$20												
<p><input type="checkbox"/> Select</p> <p>MyBlue Plus Bronze 912 Monthly Premium \$1411.15</p> <table border="1"> <tr> <td>Coinsurance 50%</td> <td>Individual Deductible \$1500</td> <td>Individual Out-of-Pocket Maximum \$10000</td> </tr> <tr> <td>Network: MyBlue Plus POS</td> <td>Office Visit Copay \$30</td> <td></td> </tr> </table> <p>View Plan Details</p>	Coinsurance 50%	Individual Deductible \$1500	Individual Out-of-Pocket Maximum \$10000	Network: MyBlue Plus POS	Office Visit Copay \$30		<p><input type="checkbox"/> Select</p> <p>Blue Precision Bronze HMO Standard - Select Rx Copays Monthly Premium \$1430.70</p> <p>6 Compare Plans</p> <p><input checked="" type="checkbox"/> Easy Pricing</p> <table border="1"> <tr> <td>Coinsurance 50%</td> <td>Individual Deductible \$7500</td> <td>Individual Out-of-Pocket Maximum \$10000</td> </tr> <tr> <td>Network: Blue Precision HMO</td> <td>Office Visit Copay \$50</td> <td></td> </tr> </table> <p>View Plan Details</p>	Coinsurance 50%	Individual Deductible \$7500	Individual Out-of-Pocket Maximum \$10000	Network: Blue Precision HMO	Office Visit Copay \$50	
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Network: MyBlue Plus POS	Office Visit Copay \$30												
Coinsurance 50%	Individual Deductible \$7500	Individual Out-of-Pocket Maximum \$10000											
Network: Blue Precision HMO	Office Visit Copay \$50												

Compare Plans

1. The Compare Plans window displays a side-by-side comparison of the selected plans. User can compare and/or access following:

- Monthly Premium
- Plan Features
- Benefit Details
- Plan Documents

2. **Print Plans** button allows user to either Print and/or Save Compare Plans page.

Below are in-network benefits only. Please refer to the summary of benefits for out-of-network.

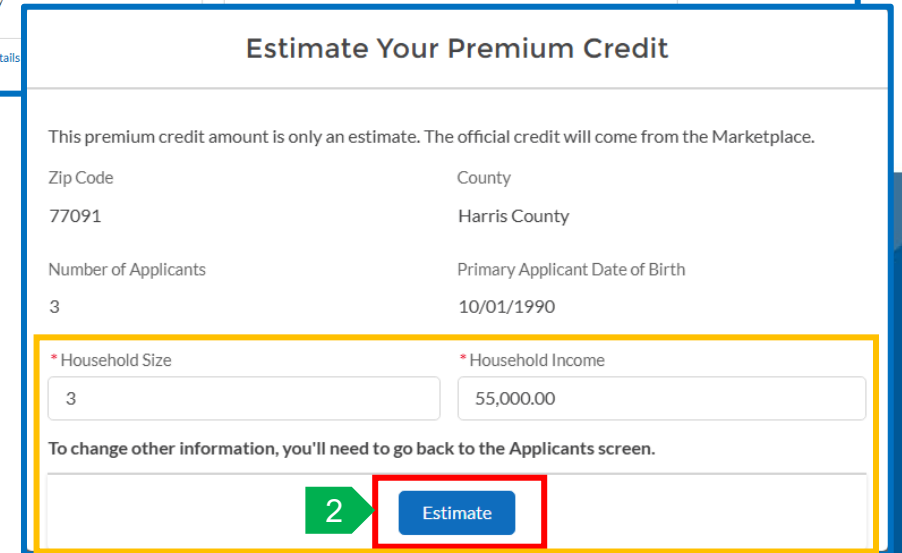
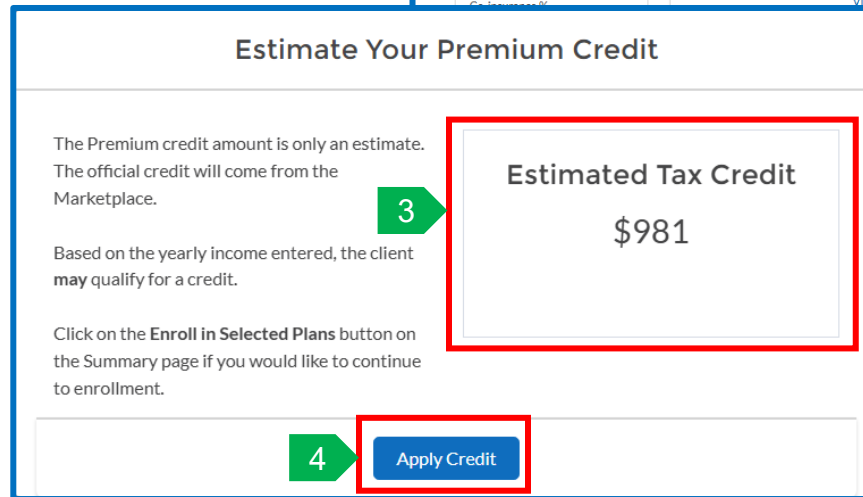
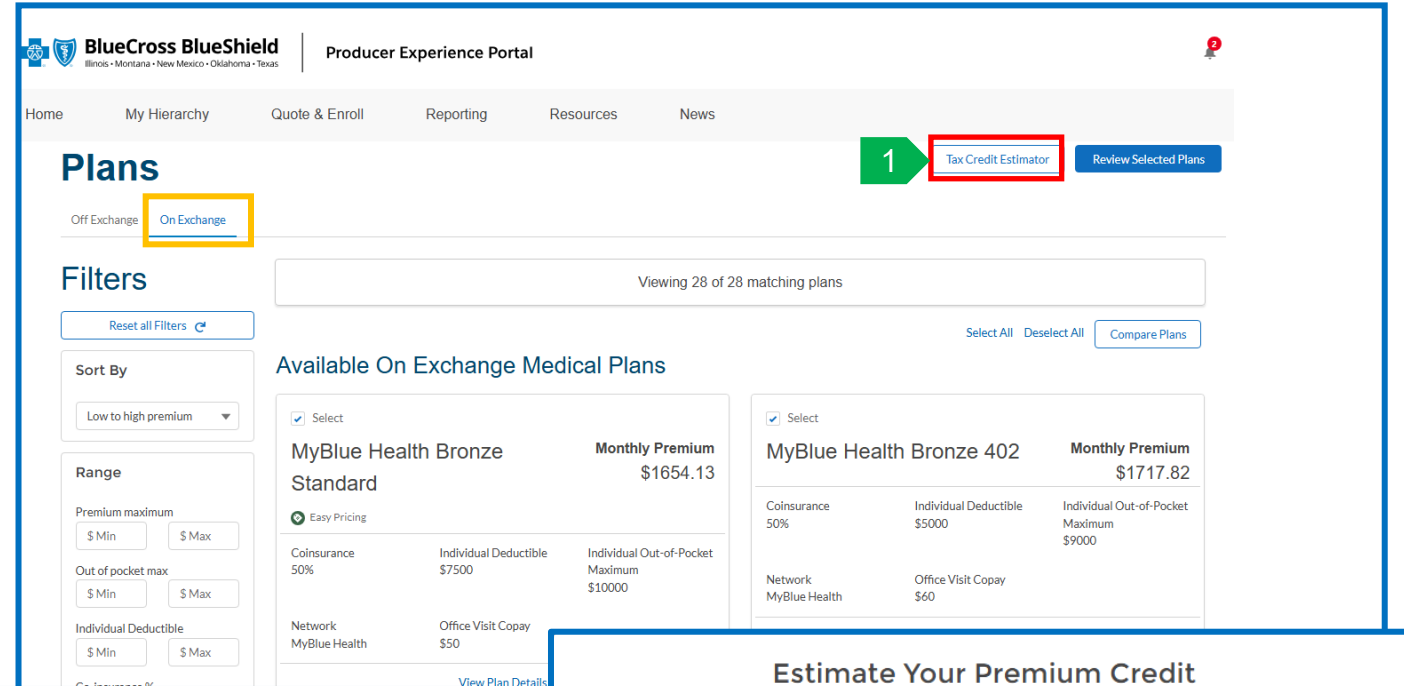
	Plan 1 MyBlue Plus Bronze Standard - Select Co Copays	Plan 2 MyBlue Plus Bronze 900	Plan 3 MyBlue Plus Bronze 912
Monthly Premium	\$684.82	\$706.82	\$729.68
Individual Deductible	\$7500	\$4000	\$1500
Individual Out-of-Pocket Maximum	\$10000	\$9500	\$10000
Specialist Office Visit	\$100 Copay	50% Coinsurance after Deductible	\$140 Copay
Office Visit	\$50 Copay	\$20 Copay	\$30 Copay
Emergency Room Treatment (Hospital)	50% Coinsurance after Deductible	50% Coinsurance after Deductible	50% Coinsurance after Deductible
Inpatient Hospital Services Medical/Surgical Services	50% Coinsurance after Deductible Per Stay	50% Coinsurance after Deductible Per Stay	50% Coinsurance after Deductible Per Stay
Preferred Pharmacy	Preferred Generics: \$25 Non Preferred Generics: N/A Preferred Formulary: \$50 Copay Non Preferred Formulary: \$100 Copay Preferred Specialty: \$500 Non Preferred Specialty: N/A	Preferred Generics: 0% Coinsurance after Deductible Non Preferred Generics: 10% Coinsurance after Deductible Preferred Formulary: 20% Coinsurance after Deductible Non Preferred Formulary: 30% Coinsurance after Deductible Preferred Specialty: 40% Coinsurance after Deductible Non Preferred Specialty: 50% Coinsurance after Deductible	Preferred Generics: \$40 Non Preferred Generics: \$150 Preferred Formulary: 25% Coinsurance after Deductible Non Preferred Formulary: 40% Coinsurance after Deductible Preferred Specialty: 45% Coinsurance after Deductible Non Preferred Specialty: 50% Coinsurance after Deductible
90-Day Supply Options	Preferred Generics: \$75 Non Preferred Generics: N/A Preferred Formulary: \$150 Copay Non Preferred Formulary: \$300 Copay Preferred Specialty: N/A Non Preferred Specialty: N/A	Preferred Generics: 0% Coinsurance after Deductible Non Preferred Generics: 10% Coinsurance after Deductible Preferred Formulary: 20% Coinsurance after Deductible Non Preferred Formulary: 35% Coinsurance after Deductible Preferred Specialty: N/A Non Preferred Specialty: N/A	Preferred Generics: \$100 Non Preferred Generics: \$450 Preferred Formulary: 25% Coinsurance after Deductible Non Preferred Formulary: 40% Coinsurance after Deductible Preferred Specialty: N/A Non Preferred Specialty: N/A
Prescription Drug List	View Drug List	View Drug List	View Drug List
Preventive Drug List	N/A	N/A	N/A
Summary of Benefits	View Summary of Benefits	View Summary of Benefits	View Summary of Benefits

Tax Credit Estimator

The tax credit estimator tool estimates the subsidy amount the applicant may be eligible for.

1. Once the user is on the View Plans page, they can select the **Tax Credit Estimator** button.
2. The user will enter the Household Size and Household Income and select **Estimate** button for system to estimate the tax credit.
3. If the client is eligible for a tax credit, the estimated tax credit will be displayed. Tax credits only apply to On Exchange plans.
4. The user will select **Apply Credit** and land on the On Exchange plans page.

Note: Tax Credit Estimator may not be available for State-based Exchanges.



Tax Credit Estimator

1. If the user is eligible for a subsidy, the **On Exchange** Medical plan **monthly premiums** will reflect the estimated tax credit.
2. Once the user has selected a plan(s), click **Review Selected Plans** to continue to the Review page.

The screenshot displays the 'Tax Credit Estimator' interface within the 'Producer Experience Portal'. The top navigation bar includes 'Home', 'My Hierarchy', 'My Delegates', 'Quote & Enroll', 'Commissions & Reporting', and 'Resources'. The main content area is titled 'Plans' and shows 'On Exchange' selected. A 'Review Selected Plans' button is highlighted with a red box and a green arrow labeled '2'. The 'Available On Exchange Medical Plans' section lists several plans, with the 'Monthly Premium' for the selected plan highlighted by a red box and a green arrow labeled '1'.

Plan Name	Monthly Premium
MyBlue Health Bronze 402	\$749.04
MyBlue Health Bronze Standard	\$757.65
MyBlue Health Gold 403	\$925.90
MyBlue Health Gold Standard	\$951.54

Review Page

1. The Review page will display plans with all plans selected by default. The user can select **Save Proposal** to save selected plans.
 - Select or deselect Individual Plan checkbox
 - **Select All** will select all plans
 - **Deselect All** will deselect all plans
2. The **Send Quote** button will take user to the send quote page. Please refer to the Send Quote Guide.
3. The **Enroll in Selected Plans** button will take the user to enrollment. Please refer to the Enrollment Guide for the enrollment flow.

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Home My Hierarchy Quote & Enroll Reporting Resources News

Review

2 You can only select up to 1 medical and 1 dental plan to continue to enrollment

Select All **1** Save Proposal Send Quote Enroll in Selected Plans

Medical Plans

MyBlue Plus Bronze Standard - Select			Monthly Premium
Rx Copays			\$598.82
<input type="checkbox"/> Select			
<input checked="" type="checkbox"/> Easy Pricing			
Coinsurance 50%	Individual Deductible \$7500	Individual Out-of-Pocket Maximum \$10000	
Network MyBlue Plus POS	Office Visit Copay \$50		
View Plan Details			

MyBlue Plus Bronze 903			Monthly Premium
			\$618.06
Coinsurance 50%	Individual Deductible \$4000	Individual Out-of-Pocket Maximum \$9500	
Network MyBlue Plus POS	Office Visit Copay \$20		
View Plan Details			

Previous Save Proposal **Enroll in Selected Plans** **3**

Access Saved Quotes

1. The user will navigate to **Quotes** to see all the Saved Quotes created for clients. A quote will expire at midnight on the day of creation.
2. Producers and sub-producers can only see their own quotes, while users with agency permissions, can view all quotes created by anyone in the agency's hierarchy.
 - If the user is an agency and they are not seeing all their agency quotes, please contact PEP Support team via email at Pep_Pilot@bcbsil.com.
3. The Quotes section will display the following information:
 - **Proposal Quote Number**
 - **Prospect Name**
 - **State**
 - **Product**
 - **Plans Quoted**
 - **Created Date**
 - **Effective Date**
 - **Producer Name**
 - **Proposal Status**
 - **Quote Emailed**

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Home My Hierarchy My Delegates Quote & Enroll

Quote & Enroll

1 [Quotes](#)
View saved quotes

[New Quote](#)
Generate a new quote for a prospective client

[Enroll](#)
Enroll a client in an insurance plan

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Home My Hierarchy Quote & Enroll Reporting Resources News

Quotes

Past Quotes [New Quote](#)

18 items • Sorted by Proposal Quote Number • Filtered by All quotes

	Proposa... ↑	Prospect Name	State	Product	Plans ...	Created Date	Effective...	Producer Name	Prop...	Quote ...	
3	1	00003493	csvsdgg IFMData	IL	IFM	1	7/29/2025, 3:20 AM	8/1/2025	SMITH, RACHEL LE...	Expired	No
	2	00003495	xchtqzd IFMData	IL	IFM	1	7/29/2025, 3:23 AM	8/1/2025	SMITH, RACHEL LE...	Expired	No
	3	00003497	hxhzvme IFMData	IL	IFM	1	7/29/2025, 3:31 AM	8/1/2025	SMITH, RACHEL LE...	Expired	No
	4	00003499	xgfbzuj IFMData	IL	IFM	1	7/29/2025, 3:34 AM	8/1/2025	SMITH, RACHEL LE...	Expired	No
	5	00005667	Janetest Smithtest	IL	IFM	1	11/12/2025, 4:30 PM	1/1/2026	FRITZ, CALVIN C	Expired	No

View Proposal

1. When the user clicks on the **Proposal Quote Number**, they will have access to the following information:

A. View Proposal with Proposal #

- **Applicant Information**
- **Dependent Information**
- **Producer Information**

B. Quick Links

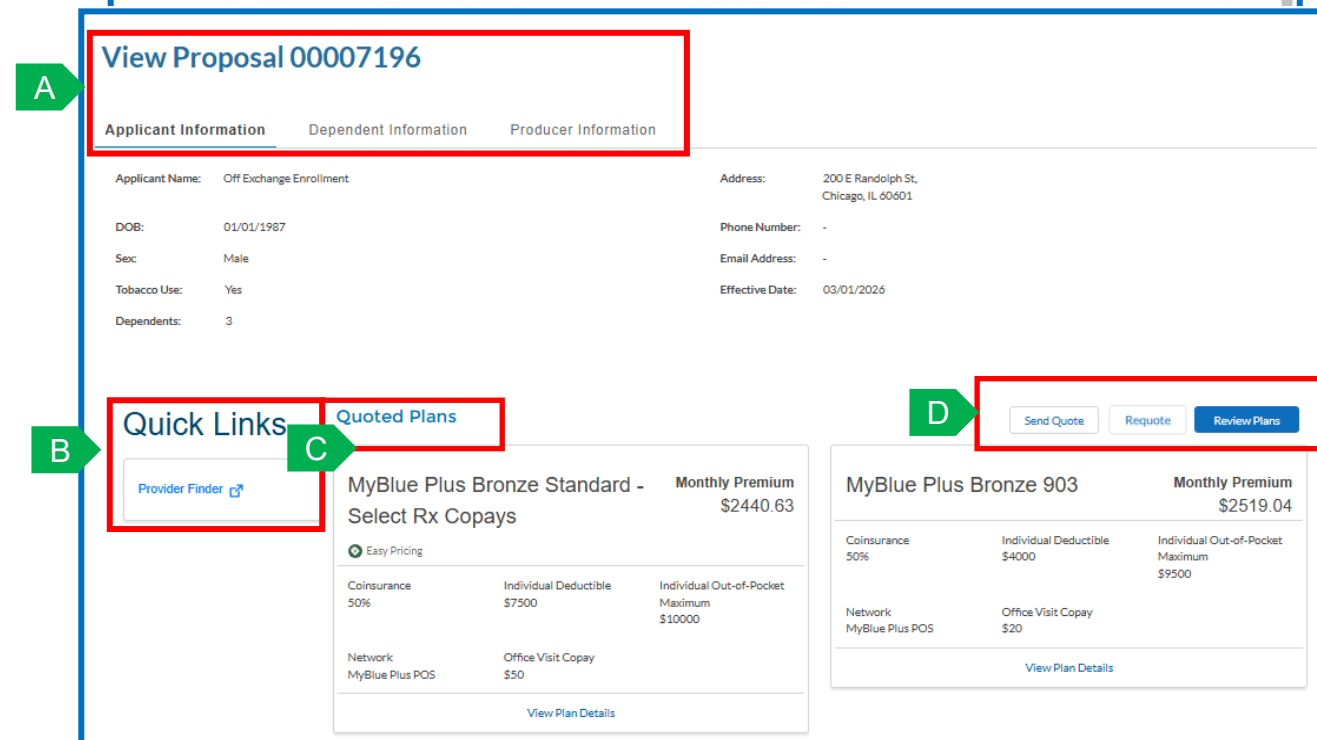
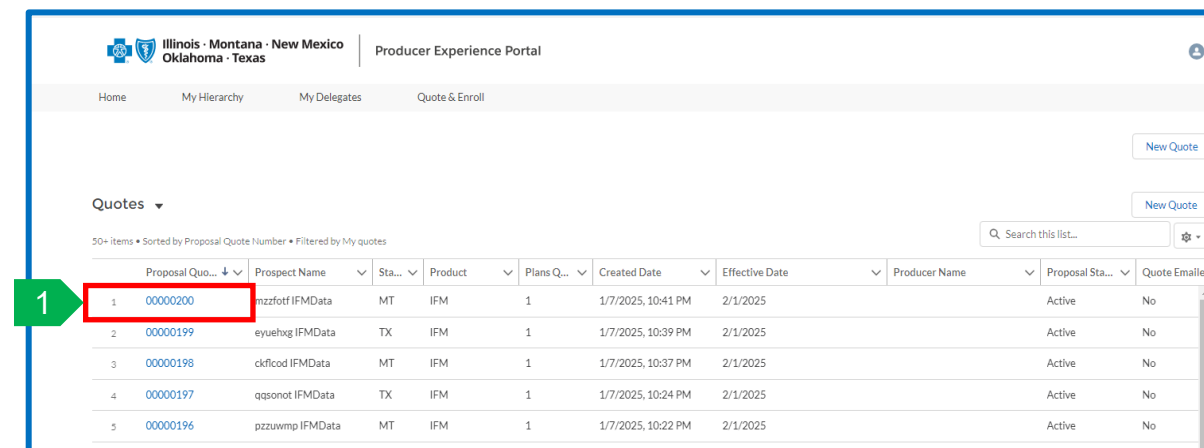
- **Provider Finder:** To determine if a provider participates in a particular plan network.

C. Quoted Plans

- Users will be able to view all the plan(s) previously saved.

D. Additional Options

- **Send Quote:** To **send quote**, click on **Send Quote** (Please refer to the Send Quote Guide).
- **Requote:** When the user selects **Requote**, the user will be directed to the Primary Applicant Information page with the previously saved quote's information displayed (Please refer to the Requote Guide).
- **Review Plans:** If the quote is active and there are no changes, the user may click on **Review Plans** button to proceed to Plan Summary page.



Requote

1. User will select Quote from **Past Quotes**
2. User will select **Requote** and will be directed to the **Producer Information** or **Primary Applicant Information** page with the previously saved quote's information displayed.
 - A. User can update any of the prepopulated applicant information. *If the producer number needs to be edited on the requote, then a new quote needs to be created.*
 - B. User can update address by typing the new address in Address Search field and selecting one from recommended addresses.
 - C. User can add, update, or remove Spouse and/or Dependents.

NOTE: The Producer Information section appears only when signed in as a Delegate. When signed in as a Producer, the page begins with Primary Applicant Information.

3. To continue with requote, user should select View Plans button to continue to the View Plans page.

NOTE: User may need to update the effective date if quoting for a different date than previous quote.

Quotes

19 Items • Sorted by Proposal Status • Filtered by All quotes

Proposal #	Prospect Name	State	Product	Plans	Created Date	Effective Date	Producer Name
1	00003497 hohzvine IFMData	IL	IFM	1	7/29/2025, 3:31 AM	8/1/2025	SMITH, RACHEL LE...
2	00003493 cvsddg IFMData	IL	IFM	1	7/29/2025, 3:20 AM	8/1/2025	SMITH, RACHEL LE...
3	00003495 xchtqzd IFMData	IL	IFM	1	7/29/2025, 3:23 AM	8/1/2025	SMITH, RACHEL LE...

Primary Applicant Information

Writing Producer Number: 107963123

Producer Name: FRACARO, VALERIE ANN | Company Name: FRACARO, VALERIE ANN | State: IL

Primary Applicant Information

*First Name: hohzvine | *Last Name: IFMData

*Date of Birth: 07/29/1995 | *Shipping Date: 03/02/2025 | *Effective Date: 03/01/2025

⚠ Major Medical Plans will require a qualifying event - the selected requested effective date cannot be guaranteed.

Phone Number: | Email: | Sex: Male Female | Tobacco Use: Yes No

Address Search: Enter Address Here | Enter in address manually

Address: 110 N Wacker Dr | City: Chicago | State: IL | Zip Code: 60605 | County: Cook County

Spouse: (DOB: 07/29/2001, Sex: Female, Tobacco Use: No) **2C**

Dependents: (DOB: 07/29/2001, Sex: Female, Tobacco Use: No) **2C**

+ Add Dependent

View Plans **3**

Remove/Update Spouse/Dependent

1. To **remove a spouse or dependent:**

1A. Under the **Spouse or Dependents** section, **Click** the 'X' icon located to the right side of the applicant's information box that needs to be deleted.

2. To **update spouse or dependent information:**

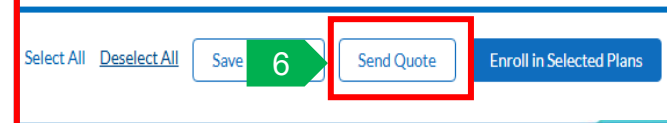
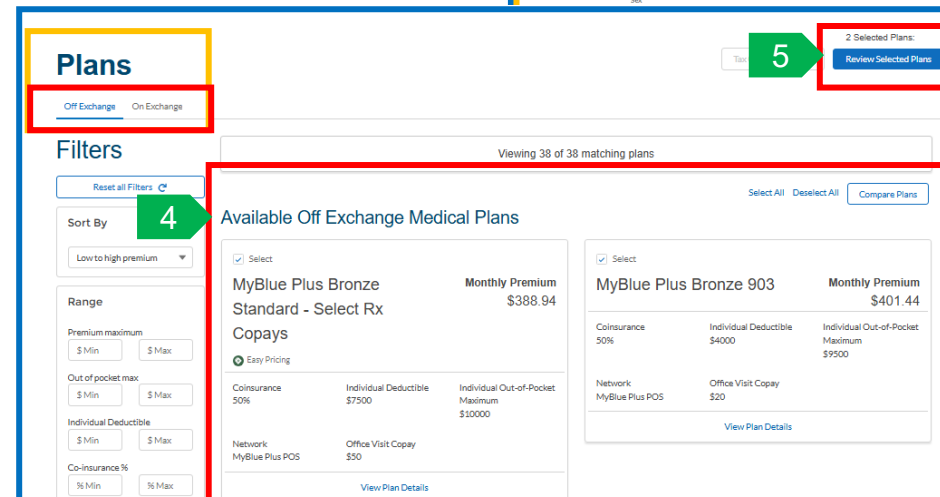
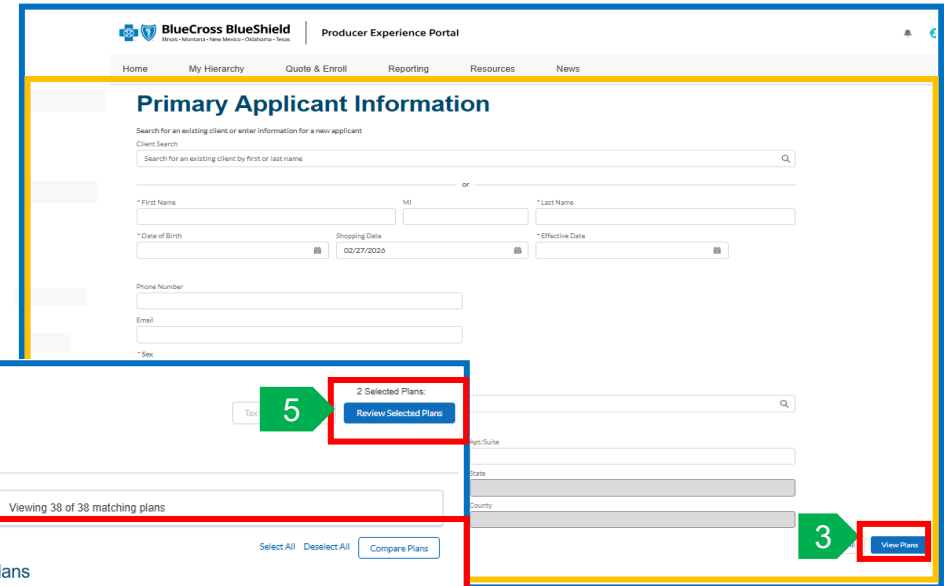
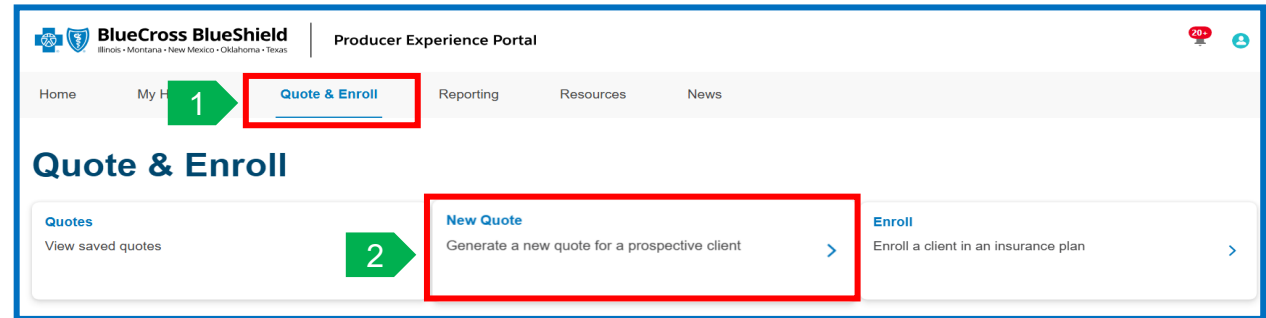
2A. Click anywhere inside the applicant's information white box
2B. Update information as needed.
2C. Select **Save** button.

Send Quote - New Quote

NOTE: Users can send quote through multiple workflows. The first workflow is described below:

1. To send quotes, the user will navigate to **Quote and Enroll**.
2. The user will navigate to **New Quotes** to initiate the creation of a new quote.
3. The user enters client details and clicks **View Plans** button
4. User will land on the **Plans** page, **Off Exchange** tab. User will review and **Select** (via checkbox) the desired Off Exchange OR On Exchange plan(s) to send.
5. The user will scroll to the top or bottom of the page and select **Review Selected Plans**.
6. The user will select **Send Quote**.

Note: On Exchange and Off Exchange plans cannot be quoted at the same time.



Send Quote - New Quote

7. The user will enter the following fields:

- **Primary Client's Email Address**
- **Additional Client Email Address** (Each email address needs to be separated by semicolon (;))
- **Producer's Email Address**
- **Producer's Phone Number**

8. After completing the required fields, the user will select **Send Quote and Save Proposal**.

9. The user will receive a confirmation message stating **Quote was sent and saved successfully**. An email with the selected quote(s) will be sent to the client's primary email address, and, if specified, additional client email addresses.

NOTE: Email addresses entered in the Additional Client Email Address field must be unique. If the same email is entered, the system shows a duplicate error:

“Error: Duplicate email addresses are not allowed”

Also, only 3 email addresses can be added in the Additional Client Email Address field.

Send this Quote

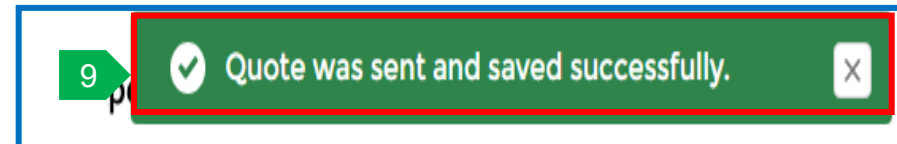
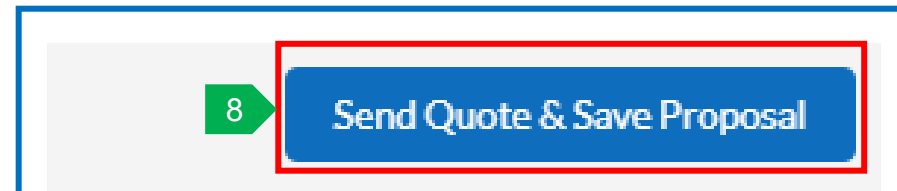
* Primary Client's Email Address

Additional Client Email Addresses

Enter up to 3 additional client email addresses, separated by semi colons

* Producer's Email Address

* Producer's Phone Number



Send Quote – View Proposal

The second workflow is described below:

1. To send a previously generated quote, user will navigate to **Quotes**.
2. User will select the **Proposal Quote Number** to be sent to the client.

NOTE: Only quotes with an **Active Proposal Status** can be sent to the client.

The top screenshot shows the 'Quote & Enroll' page with three main buttons: 'Quotes' (highlighted with a red box and a green arrow labeled '1'), 'New Quote', and 'Enroll'. The bottom screenshot shows the 'Quotes' page with a table of 'Past Quotes'. The table has columns for Proposal Quote Number, Prospect Name, State, Product, Plans, Created Date, Effective Date, Producer Name, Proposal Status, and Quot... The 'Proposal Quote Number' column is highlighted with a red box, and a green arrow labeled '2' points to the value '0000272' in the 7th row. The 'Proposal Status' for this row is 'In Progress'. The 'Proposal Status' for the 9th row is 'Active', which is highlighted with a yellow box.

	Proposal Quote Number	Prospect Name	State	Product	Plans ...	Created Date	Effective ...	Producer Name	Proposal Status	Quot...
1	00007071	Testuat TX	TX	IFM	2	1/28/2026, 12:51 PM	2/1/2026	HOWE, HENRY STOCK	Expired	Yes
2	00007084	Testuat TX	TX	IFM	2	1/29/2026, 9:31 AM	2/1/2026	HOWE, HENRY STOCK	Expired	Yes
3	00007085	Testuat TX	TX	IFM	2	1/29/2026, 9:42 AM	2/1/2026	HOWE, HENRY STOCK	Expired	Yes
4	00007086	Testuat TX	TX	IFM	1	1/29/2026, 1:56 PM	1/1/2026	HOWE, HENRY STOCK	Expired	Yes
5	00007094	Testuat TX	TX	IFM	34	1/30/2026, 7:56 AM	2/1/2026	HOWE, HENRY STOCK	Expired	Yes
	00007096	Testuat TX	TX	IFM	1	1/30/2026, 1:44 PM	1/1/2026	HOWE, HENRY STOCK	Expired	Yes
	0000272	Testuat001 TestIL	IL	IFM	2	2/13/2025, 2:57 PM	3/1/2025		In Progress	No
8	0000574	Testuat TX	TX	IFM	5	2/18/2025, 8:42 AM	3/1/2025	HOWE, HENRY STOCK	In Progress	No
9	00007106	Testuat TX	TX	IFM	2	2/2/2026, 7:17 AM	3/1/2026	HOWE, HENRY STOCK	Active	No

Send Past Quote – View Proposal

3. On the **View Proposal** page, the user will select **Send Quotes**

4. The user will enter the following fields:

- **Primary Client's Email Address**
- **Additional Client Email Address** (*Each email address needs to be separated by semicolon (;).*)
- **Producer's Email Address.**
- **Producer's Phone Number.**

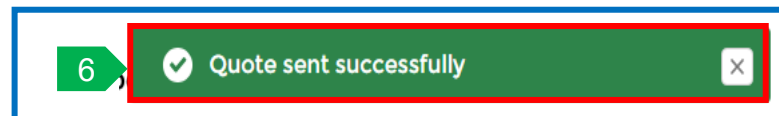
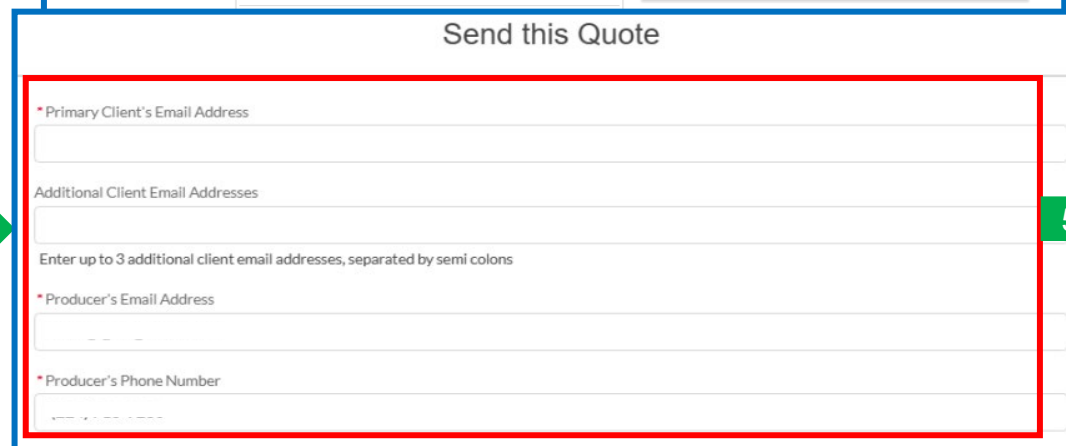
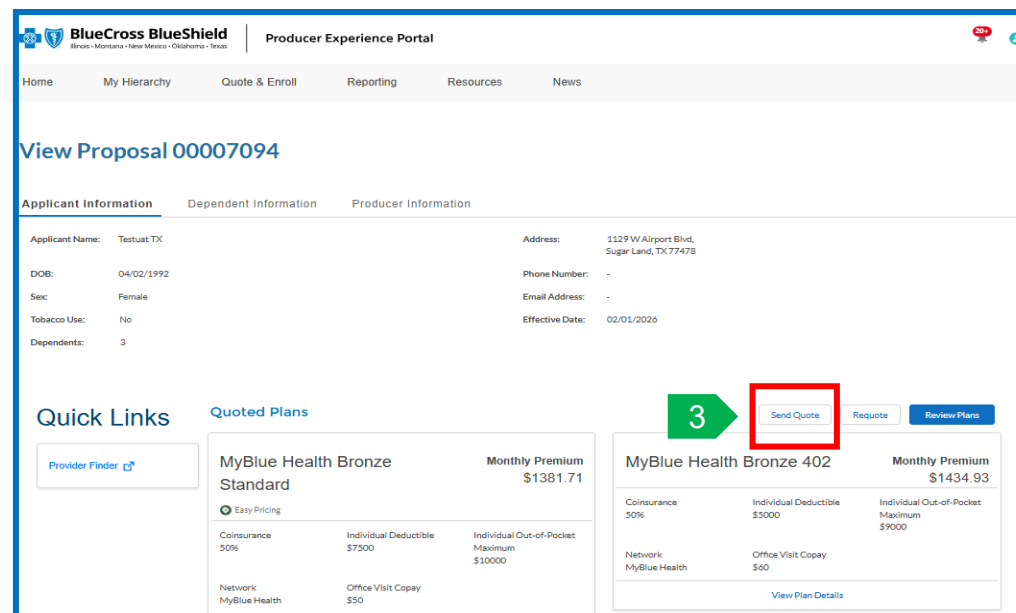
5. After completing the required fields, the user will select **Send Quote**.

6. The user will receive a confirmation message stating **Quote sent successfully**. An email with the selected quote(s) will be sent to the client's primary email address, and, if specified, additional client email addresses.

NOTE: *Email addresses entered in the Additional Client Email Address field must be unique. If the same email is entered, the system shows a duplicate error:*

“Error: Duplicate email addresses are not allowed”

Also, only 3 email addresses can be added in the Additional Client Email Address field.

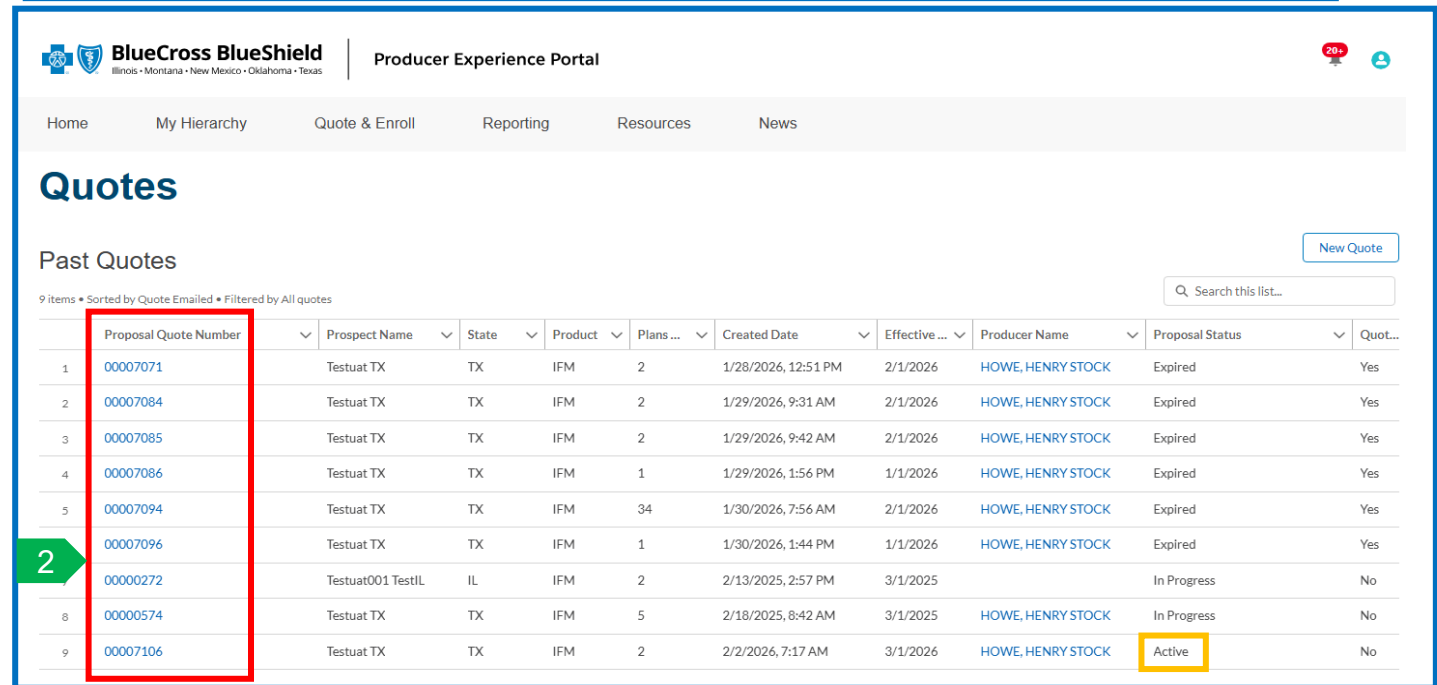
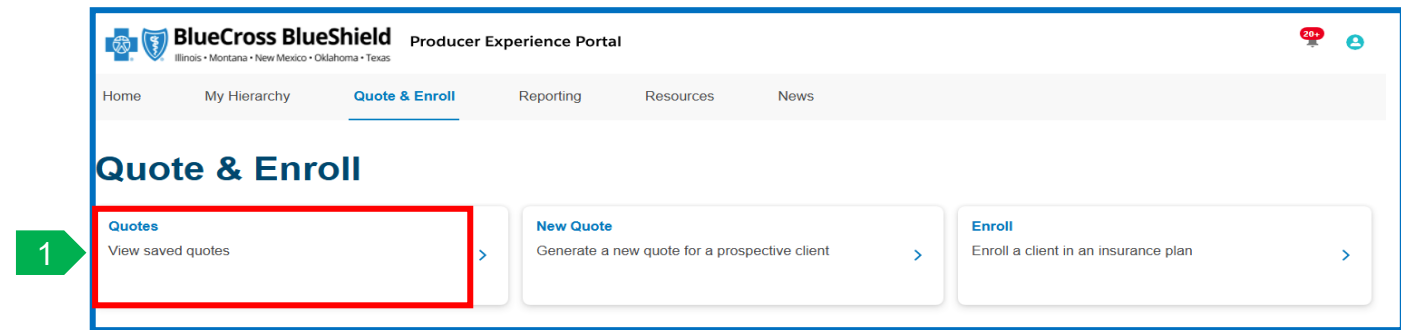


Send Quote – Review Plan

The third workflow is described below:

1. To send a previously generated quote, user will navigate to **Quotes**.
2. User will select the **Proposal Quote Number** to be sent to the client.

NOTE: Only quotes with an **Active Proposal Status** can be sent to the client.



Send Quote – Review Plan

3. On the **View Proposal** page, the user will select **Review Plans**. User will review and **Select** the desired plans to send.

4. User will click on **Send Quote**.

5. The user will enter the following fields:

- **Primary Client's Email Address**
- **Additional Client Email Address** (Each email address needs to be separated by semicolon (;))
- **Producer's Email Address**
- **Producer's Phone Number**

6. After completing the required fields, the user will select **Send Quote**.

7. The user will receive a confirmation message stating **Quote sent successfully**. An email with the selected quote(s) will be sent to the client's primary email address, and, if specified, additional client email addresses.

NOTE: Email addresses entered in the **Additional Client Email Address** field must be unique. If the same email is entered, the system shows a duplicate error:

“Error: Duplicate email addresses are not allowed”

Also, only 3 email addresses can be added in the **Additional Client Email Address** field.

