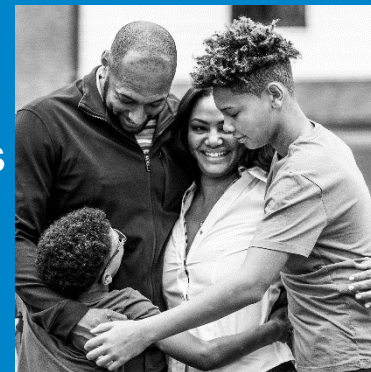# BLUE Q USER GUIDE

Proposals System for quoting Small Group (2-99) NEW business

Note: An active appointment with Blue KC is required to access Blue Q. To get appointed you must have current KS and MO Health and Life Licenses and valid E & O Insurance. To begin the onboarding process please email our Producer Operations Team at **producerinfo@bluekc.com** or call 816-395-3016.
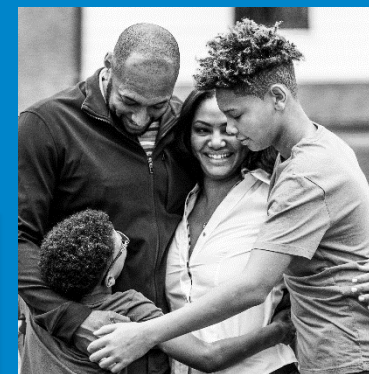
Blue Q Proposals System: Table of Contents
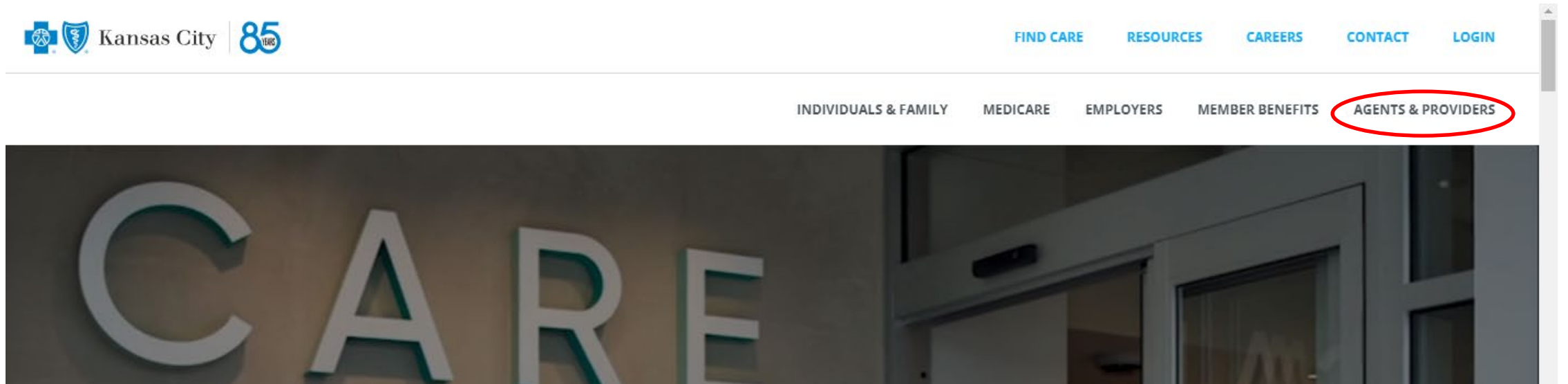
Kansas City

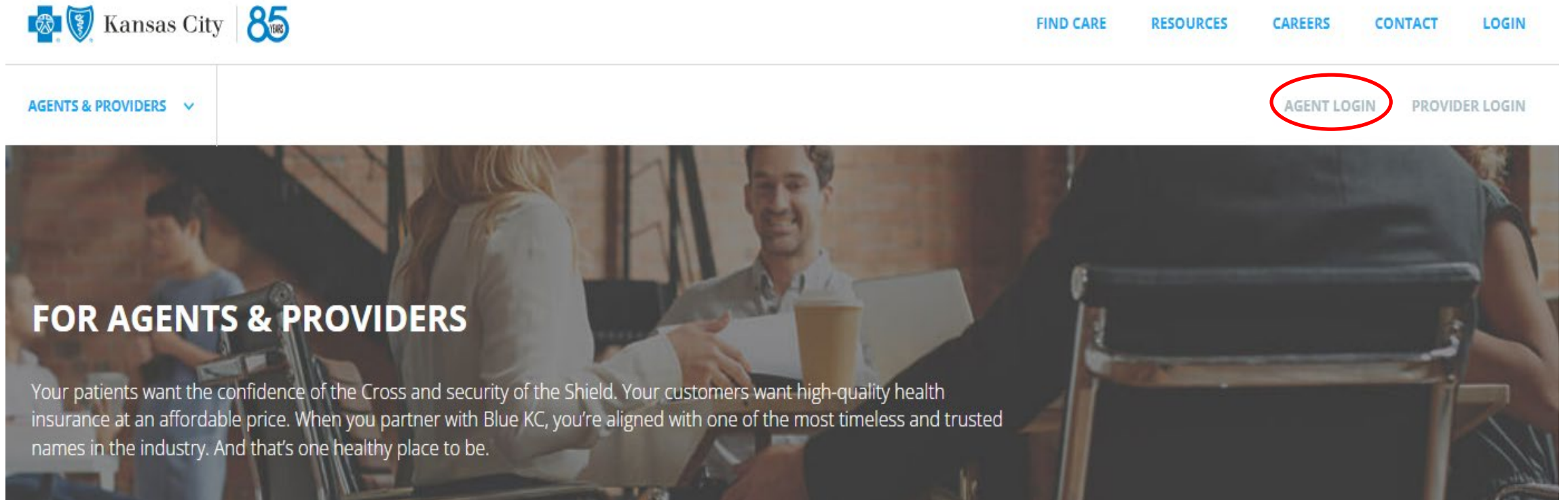# LOGGING IN

Blue Q Proposals System: Logging In

STEP 1: Go to **www.bluekc.com**
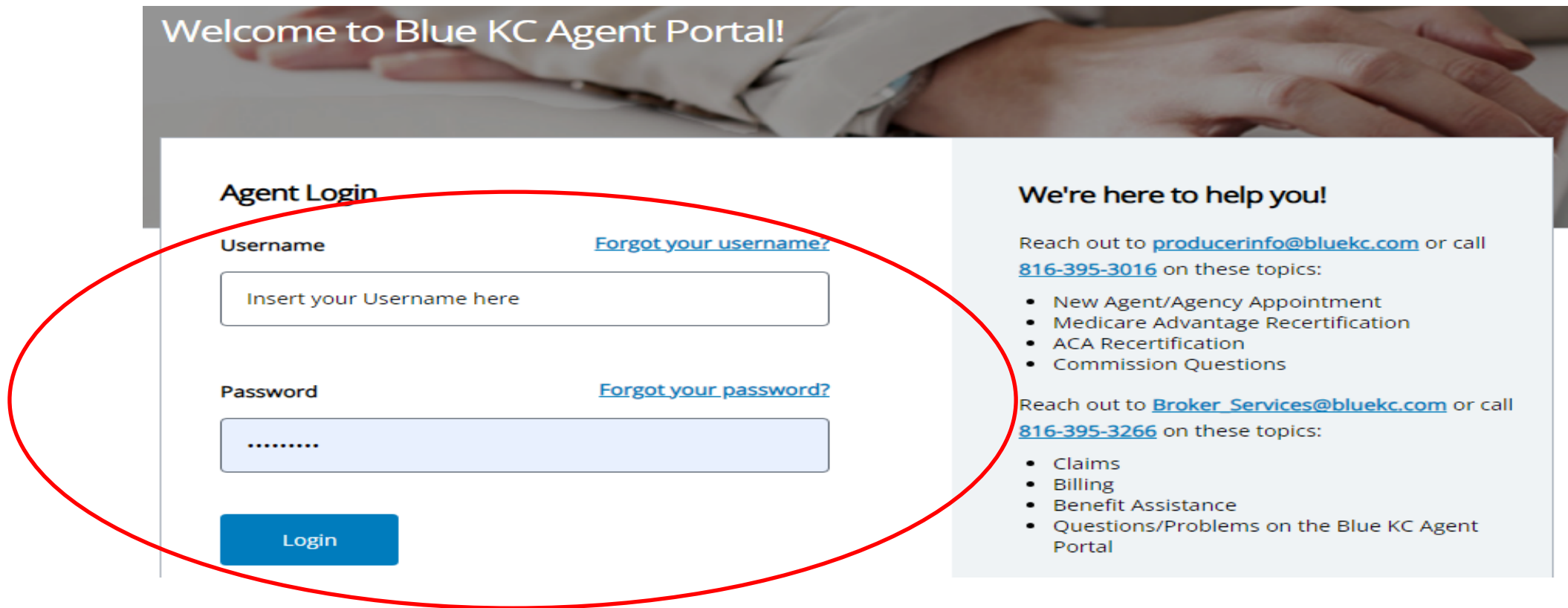
STEP 2: Click on "AGENTS & PROVIDERS"

Blue Q Proposals System: Logging In

STEP 3: **Click on "AGENT LOGIN"**

Blue Q Proposals System: Logging In

STEP 4: **Enter your Username and Password and click the "Login" button**
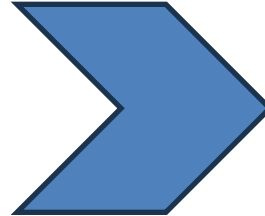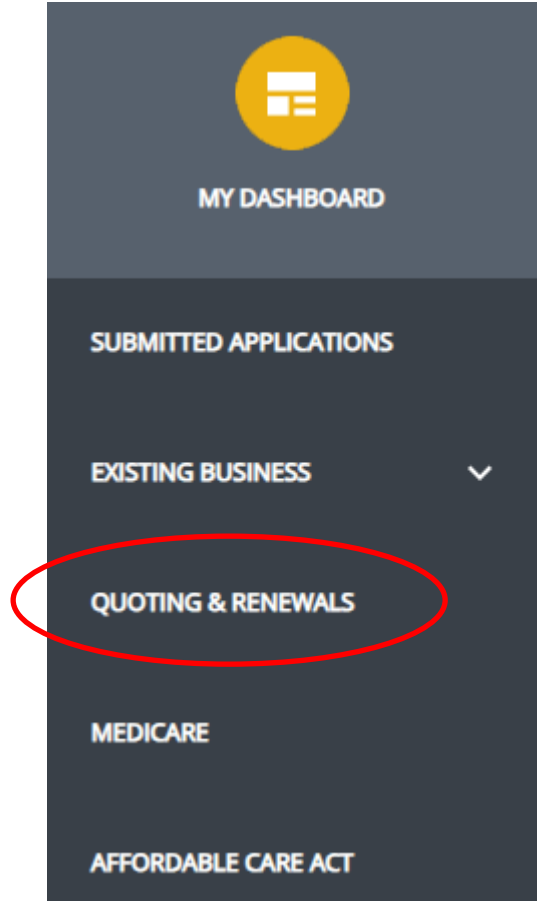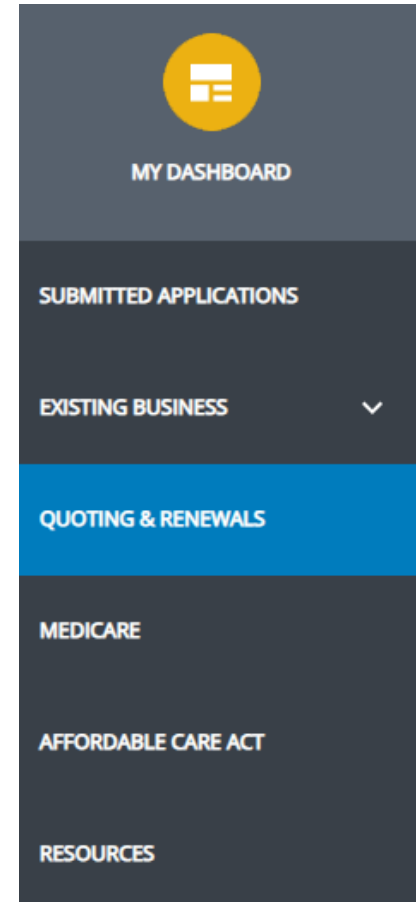
PREPARING QUOTES FOR NEW GROUPS

Blue Q Proposals System: Preparing Quotes for New Groups

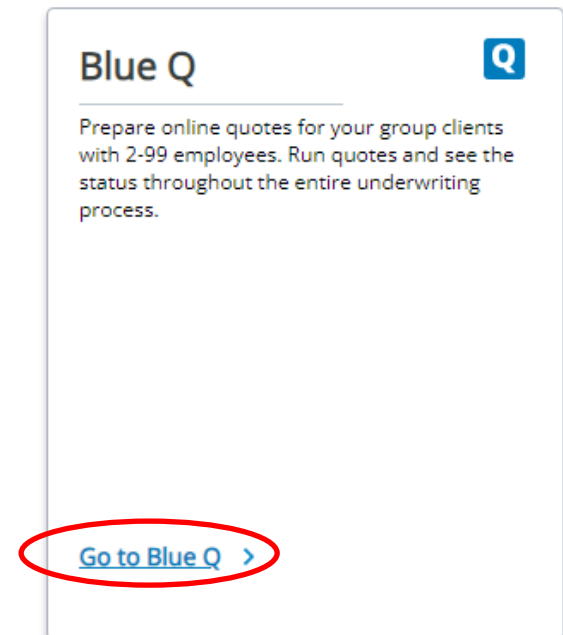**STEP 1:** Click on "QUOTING & RENEWALS"
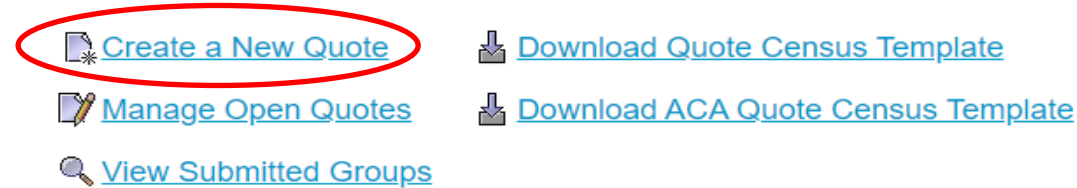
STEP 2: Click on "Go to Blue Q"

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Blue Q Proposals System: Preparing Quotes for New Groups

STEP 3: **Click on "Create a New Quote"**

~~Create a New Quote~~   Download Quote Census Template

Manage Open Quotes   Download ACA Quote Census Template

View Submitted Groups

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Additional Tools/Features:

- **Manage Open Quotes –** review and edit existing quotes (change effective dates, update census data, etc.). Be sure to click the "Recalculate Rates" button after any changes/updates are made.

- **View Submitted Groups –** review Groups that have been submitted for underwriting (effective date, date submitted, and current status).

- **Download Quote Census Template (used for quoting Level Funded ASO and 51-99 Fully Insured groups) –** complete the REQUIRED fields and save, then upload to BlueQ (rather than line-by-line employee/dependent data entry) **Note: final underwitten rates are subject to medical underwriting.**

- **Download ACA Quote Census Template (used for quoting ACA plan options) –** complete the REQUIRED fields and save, then upload to BlueQ (rather than line by line-by-line employee/dependent data entry).

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Blue Q Proposals System: Preparing Quotes for New Groups

STEP 4: Type the Company Name in the box and click the "Search" button

Enter the Company Name or Company Name and Zip then click Search. Once the search results appear, click on the company name to begin the quote.

Company Name: [   ] [Search] ←

Zip: [   ]

STEP 5: The search engine will check our database for the Company Name. If you see the company listed, click the company name to prepopulate the group information (name, address, etc.) on the next page. If you receive no results from the search, click the "Create New" button.

Enter the Company Name or Company Name and Zip then click Search. Once the search results appear, click on the company name to begin the quote.

Company Name: [abc   ] [Search]

Zip: [   ] [Create New] ←

Company Name ↓	Address
ABC	6451 NIEMAN RD, SHAWNEE, KS 66203
ABC	501 E YOUNG AVE, WARRENSBURG, MO 64093
ABC	501 E YOUNG AVE STE B, WARRENSBURG, MO 64093
ABC	2501 MCGEE ST, KANSAS CITY, MO 64108
ABC	11221 ROE AVE, LEAWOOD, KS 66211
ABC	9225 INDIAN CREEK PKWY, OVERLAND PARK, KS, OVERLAND PARK, KS 66210

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Blue Q Proposals System: Entering Company Information

STEP 6: Enter the Company information (*****are required fields) and use the "tab" key to move to the next field. Once all required fields are completed click on the "Next >>" button at the bottom of the screen.

Blue Q Proposals System: Entering Census Data

STEP 7:

- **Option 1: Enter the complete census for employees and dependents. Once completed click on the "Next >>" button at the bottom of the screen.**

- **Option 2: Upload a previously saved census (must be on our specific template) by clicking the "Choose File" button, choosing your file, then clicking the "Upload Census" button. Once completed click on the "Next >>" button at the bottom of the screen.**

Blue Q Proposals System: Product Selections

STEP 8: This is the product selection page where you choose the Health, Dental, Vision, and Life options. Check the box of the product(s)/rates you want to see and click the "Create PDF/Proposal" button.
Note: by clicking on the name of each plan you can access the detailed benefit summary and/or SBC.

Blue Q Proposals System: PDF Content/Selections

STEP 9: **This is the PDF Section Selection screen that will generate after clicking the "Create PDF/Proposal" button. On this page you can select/de-select the specific sections of the proposal that you want to present.**

• **The "Preview" button will let you view that particular section only of the PDF.**

• **Once selections have been made click the "View Proposal" button to generate the PDF Document that you can view/save/print/email.**

Note: you can dramatically decrease the size of your PDF by deselecting the "Benefit Summaries" section and/or the "Summary of Benefits and Coverage" (aka SBCs) section.

Select Section(s) for PDF

Proposal Sections

☐ Display Employee/Census Name

☑ Letter — [Preview]

☑ Case Summary — [Preview]

☑ Rate Matrix — [Preview]

☑ Group Matrix — [Preview]

☑ Dental Group Matrix ▽

☑ Vision Group Matrix ▽

☑ Understanding BlueSelect Plus PPO — [Preview]

☑ Life and Disability — [Preview]

☑ USAble Beneficiary — [Preview]

☑ Further ▽

☑ Benefit Summaries — [Preview]

☑ Summary of Benefits and Coverage — [Preview]

☑ A Healthier You — [Preview]

[View Proposal] [Cancel]
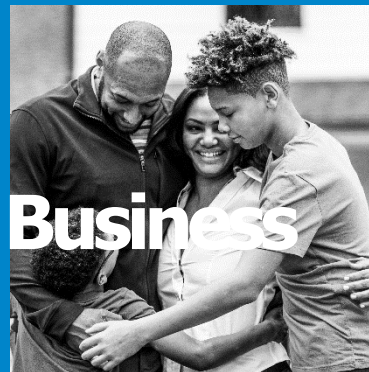
Please contact your Sales Consultant or our New Business Unit for additional support/questions.

THANK YOU