

# Broker Portal Quick Quote

From the Home page in Broker Portal, Agents will now find the Quick Quote option listed under **Actions**.

The screenshot shows the Broker Portal dashboard. At the top is a navigation bar with links: Home, Leads, Contacts, Opportunities, Quotes, Applications, Members, Resources, Reports, Chatter, and Ta. Below this is a 'Sales Dashboard' section with a sub-tab 'Age Band Dashboard'. The main content area displays 'KS Lead, Quote, Application Status' with a 'Refresh' button and a dropdown arrow. Below this are three cards: 'Leads by Leads Status and Sou...', 'Quote by Quote Status', and 'Applications by Broker and Status'. On the right side, there is an 'Actions' menu with links: 'My Calendar', 'Find A Location', 'Broker Search', and 'Quick Quote'. The 'Quick Quote' link is highlighted with a red box.

This will allow an Agent to quickly create a quote for Under 65 health coverage without capturing all the demographic data needed to create a Lead.

Once the **Quick Quote** option is selected, the Agent will then enter information in the fields displayed below.

The screenshot shows the 'Quick Quote' form. It starts with a heading 'Enter the details' and a paragraph explaining the tool. Below this is a disclaimer: 'This quote is not an offer for coverage. Rates are subject to change based on medical underwriting. Maternity benefits are not available with individual plans.' The form is titled 'Quick Quote' and contains several fields: '\* Product Type' with radio buttons for 'Medical' (selected) and 'STC'; 'State' with a dropdown menu showing 'KS'; '\* Zip Code' with a text input field; '\* Coverage Type' with a dropdown menu; '\* Effective Date' with a text input field and a search icon; '\* Age as on Effective Date' with a text input field and an information icon; and '\* Tobacco User?' with a dropdown menu. At the bottom, there are two buttons: 'Select Available Plan(s)' and 'Next'. A 'Cancel' link is also present at the bottom left.

**Please Note:** If utilizing this for Family coverage – the Agent will need to make sure the age they are entering is that of the oldest person that will be applying for coverage.

Once the required information is entered, proceed with **Select Available Plans**.

The screenshot shows the 'Available Plans' section. It lists five plans with checkboxes: 'Advanced Choice \$1,500' (checked), 'Advanced Choice \$3,000' (checked), 'High Deductible Health Plan (HSA-Qualified) \$4,500' (unchecked), 'High Deductible Health Plan (HSA-Qualified) \$7,500' (checked), and 'Major Medical \$7,500' (unchecked). At the bottom, there are two buttons: 'Cancel' and 'Next'.

The system will only display plans available for the criteria you have entered.

- For example:
  - Classic Choice will not display if you have selected Family as the Coverage Type.
  - An error will be received when trying to quote Short Term coverage for an individual under 3 or 65+.

Once the Agent has selected the appropriate plans and clicks **Next**, a list of the plans selected and estimated monthly premium will be shown.

Plan Rating / Pricing

Monthly Price

Product Type	Product Name	Family	2 Person	3 Person
Medical	Advanced Choice \$1,500	\$857.50	NA	NA
Medical	Advanced Choice \$3,000	\$700.50	NA	NA
Medical	High Deductible Health Plan (HSA-Qualified) \$7,500	\$574.50	\$476.75	\$549.75

Print

By selecting **Print**, the Agent will have the option to download the Quick Quote PDF or email it to the Shopper/Prospect.

Print Quote PDF

Email

Email To

Send Email

QuickQuotePDF.pdf

Download PDF

121 %

Below is an example of the email that will be sent. A copy of the attached quote can also be found in the next 2 pages.

SS

Sales Support <noreply\_salesupport@fbhp.com>

To

Lindsey Green

QuickQuotePDF.pdf

652 KB

Thank you for your interest in Kansas Farm Bureau Health Plans. A representative with Kansas Farm Bureau Health Plans has sent a quick quote for your review. Final rates will be based on a completed application and underwriting.

If you'd like to discuss further, please contact us at 833-282-5928 or email us at [salesupport@fbhp.com](mailto:salesupport@fbhp.com).

Sincerely,

Kansas Farm Bureau Health Plans

Reply

Reply All

Forward

Thu 1/23/2025 12:55 PM

Important Information

The quotes generated utilizing the Quick Quote feature do not contain benefit information and are not attached to a Contact Record or Opportunity.

When the Shopper/Prospect wants to proceed with the application process, the Agent will need to follow the appropriate steps to create an Opportunity through Broker Portal.

- Once an Opportunity/Quote is created, the Agent will be able to complete the application or the Shopper/Prospect can utilize the Transfer Application Link and complete the application on their own.



## *Your Personalized Quote...*

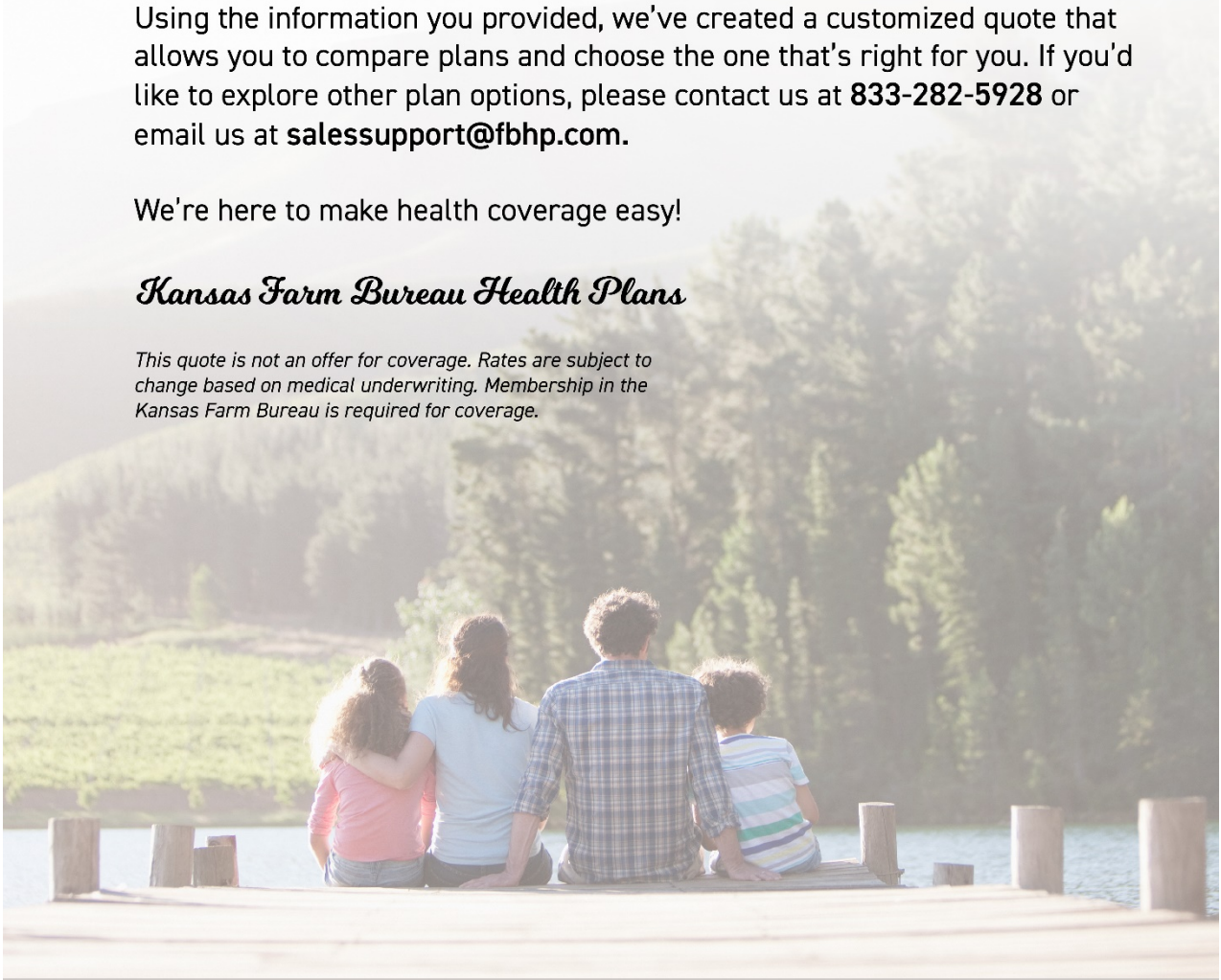
Congratulations! You've just taken an important step on the road to acquiring health coverage through Kansas Farm Bureau Health Plans.

Using the information you provided, we've created a customized quote that allows you to compare plans and choose the one that's right for you. If you'd like to explore other plan options, please contact us at **833-282-5928** or email us at **salessupport@fbhp.com**.

We're here to make health coverage easy!

### *Kansas Farm Bureau Health Plans*

*This quote is not an offer for coverage. Rates are subject to change based on medical underwriting. Membership in the Kansas Farm Bureau is required for coverage.*



**833-282-5928 | [kfbhealthplans.com](http://kfbhealthplans.com)**



## *Your Personalized Quote...*

### Rate(s)

Product Type	Product Name	Family	2 Person	3 Person
Medical	Advanced Choice \$1,500	\$857.50	NA	NA
Medical	Advanced Choice \$3,000	\$700.50	NA	NA
Medical	High Deductible Health Plan (HSA-Qualified) \$7,500	\$574.50	\$476.75	\$549.75