

The Small Business Health Options Program (SHOP)

SHOP QUOTING TOOL INSTRUCTIONS



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SHOP Quoting Tool

What is Maryland's SHOP Quoting Tool?

- The Maryland SHOP Quoting Tool is an automated Excel workbook developed by Maryland Health Benefit Exchange. It was intended to be used as an interim tool to consolidate SHOP quotes and plan information into one source for employers and their brokers.
- The tool is utilized by entering a group's census into the initial workbook page and then customizing a quote by choosing plans to display in more detail
- Employers and brokers can choose the plans that they wish to display for their employees. The final output is a plan comparison by each employee of the options chosen.
- This quoting tool is not intended to replace the premium quotes and plan information obtained directly from the insurance carriers. It is intended to be used as an initial plan review and comparison tool only. Final premium rates and plan information must be obtained from the insurance company directly.

SHOP Quoting Tool

What do I need to use this SHOP Quoting Tool?

- Access to Microsoft Excel with the ability to enable macros.
- Name of Employer
- County of Employer
- Full Birth dates of all employees, spouses and dependents
- Coverage Tier Level (Employee Only, Employee/Spouse, Employee & Children, Family)
- Billing Group – if different locations

SHOP Quoting Tool

Where do I locate the newest version of the SHOP Quoting Tool?

- All employers can locate this Quoting Tool on the Maryland Health Connection Website: <https://www.marylandhealthconnection.gov/small-business/how-to-enroll-view-available-plans/>, Employers can also obtain a copy of the Quoting Tool via email from mhbe.shop@maryland.gov following the submission of their SHOP Eligibility Application or upon request.
- All brokers can locate this quoting tool as employers do above or they may find the newest version of the SHOP Quoting Tool on our stakeholder website at the following link: <https://www.marylandhbe.com/news-and-resources/toolbox/insurance-producers/>

SHOP Quoting Tool

Quoting with the SHOP Quoting Tool

CENSUS WORKSHEET (1ST Workbook)

MD_SHOP_tool_FINAL - Excel

Rebecca Smith

FILE HOME INSERT PAGE LAYOUT FORMULAS DATA REVIEW VIEW ACROBAT

Clipboard Font Alignment Number Styles Cells Editing

B7: This census is used to gather data that will be used in other tabs in the tool. Please fill in everything marked with an asterisk (*). For the Enrollee Information table, please click the blue plus sign to add rows and the blue minus sign to delete rows as needed.

1. Company Information: Fill in the name of the company, the county the business operates in, and the date for which the policy is to be active.
2. Enrollee Information: Fill in each employee and their dependent sequentially (ie: Enter the first employee and all their dependents/spouses before entering the second employee).
- Each employee should have a unique employee number that will also be used for that employee's family members (IT IS HIGHLY RECOMMENDED THIS NOT BE PII)
- For each enrollee, designate the type in "Enrollee Type" as one of the following: Employee, Spouse, Dependent
- For each enrollee, indicate whether they will be enrolled in Medical insurance using Y for yes and N for no
- Upon completion, click the button to the right of this text to refresh the calculations based on this table

Click here to refresh Enrollee Table
(This may take some time)

Employee Information:

Employee Number	Employee Name	Date of Birth	Enrollee Type	Medical	Age	Group	Medical Tier


READY | Census | Contributions | 92%

SHOP Quoting Tool

Quoting a Group on the SHOP Quoting Tool

CENSUS WORKSHEET (1ST Workbook)

The census worksheet is the main engine of the quoting tool. Thus, the information entered on this form will affect all other worksheets generated. Information must be entered, rather than cut and pasted as indicated in the steps below or the quote will not generated correctly.



Anytime a change is done to this table, the user must click the blue button entitled “Click here to refresh Enrollee Table” to update the tool.

SHOP Quoting Tool

Quoting a Group on the SHOP Quoting Tool

CENSUS WORKSHEET (1ST Workbook)

Step 1 The first step is to enter your Company's Name. You can double click in the box that says "Sample Company" and enter your business' name.

Step 2 The second step is to enter your Company's County. This can be done by clicking on the County box and the pull down box

Step 3 The third step is to enter your Company's requested effective date for the chosen plan(s) to begin. This will determine the premiums and plans available for your business.

The screenshot shows an Excel spreadsheet titled "MD_SHOP_tool_FINAL - Excel". The ribbon includes FILE, HOME, INSERT, PAGE LAYOUT, FORMULAS, DATA, REVIEW, VIEW, and ACROBAT. The active cell is B7. A text box explains that the census is used to gather data for other tabs and that users should fill in everything marked with an asterisk (*). Below this, the "Employer and Employee Census Form" is displayed. The form has a green header and contains the following fields:

- Company Information:**
 - *Company Name:** Sample Company (with a blue arrow pointing to it)
 - *County:** Calvert County
 - *Effective Date of Coverage:** 1/1/2018

Below the form, there is a button that says "Click here to refresh Enrollee Table (This may take some time)". At the bottom, there are tabs for "Census", "Plan Shopping Tool", and "Contributions".

SHOP Quoting Tool

CENSUS WORKSHEET (1ST Workbook)

Step 4 The fourth step is to add your employees, their spouses and/or dependents information under the section entitled “Employee Information”. To add your first employee onto the census, click the Blue “+” button. Simply typing another entry in a blank spot will not work. To delete an entry line, please click the Blue “-” button.

The screenshot displays the Excel interface for the SHOP Quoting Tool. The ribbon at the top includes FILE, HOME, INSERT, PAGE LAYOUT, FORMULAS, DATA, REVIEW, VIEW, and ACROBAT. The HOME tab is active, showing options for Font, Alignment, Number, Styles, Cells, and Editing. A text box in cell B7 provides instructions: "This census is used to gather data that will be used in other tabs in the tool. Please fill in everything marked with an asterisk (*). For the Enrollee Information table, please click the blue plus sign to add rows and the blue minus sign to delete rows as needed."

The main content area is divided into two sections. The top section, labeled "1. Company Information:", contains instructions for filling in the company name, county, and date. The bottom section, labeled "2. Enrollee Information:", contains instructions for filling in employee and dependent information, including a note about the unique employee number and the "Enrollee Type" dropdown.

Below the instructions is the "Employee Information:" table. The table has columns for Employee Number, Employee Name, Date of Birth, Enrollee Type, Medical, Age, Group, and Medical Tier. The table is currently empty. To the right of the table are two buttons: a blue "+" button and a blue "-" button. A large blue arrow points to these buttons, indicating that they are used to add and delete entries.

At the bottom of the screen, the "Census" tab is selected, and the status bar shows "READY" and "92%".

SHOP Quoting Tool

CENSUS WORKSHEET (1ST Workbook)

Step 4a Employer Number— This is a number made up by the employer or broker to indicate the same employee's family unit. **It cannot be copied/ pasted into this document but must be entered.** For example, an employee with a spouse and 3 children would all be labeled Employee Number 1. Another employee with no spouse or dependents would be labeled Employee Number 2. The next employee, spouse and one child would be labeled Employee Number 3. This is important to obtain the correct quotes for all family members. **Please note: See the Medical column under Step 4e for family members not taking coverage.**

Step 4b Employer Name – This is the name you want displayed in your plan comparison page. You can choose to name each employee and family member in any way that you wish to display them in the comparison page.

Employee Information:		
*Employee Number	*Employee Name	*Medical



SHOP Quoting Tool

CENSUS WORKSHEET (1ST Workbook)

Step 4c Date of Birth – This field would be the corresponding date of birth for each employee and family member. **This field can be copied/pasted from another source, as long as it is in the MM/DD/YYYY format.** The accurate date of birth will affect the premium rates generated in the comparison page.

Step 4d Enrollee Type – This field is to indicate whether the entry is an employee, a spouse and/or a dependent. **This field should not be copied/pasted from another source but entered manually.**

Step 4e Medical indication – This field is to indicate whether or not the entered employee/family member is taking the medical coverage. Enter Y for yes and N for no. **This field can be copied/pasted from another source, as long as it is in the Y or N format.**

Date of Birth	▼	* Enrollee Type	▼	* Medical	▼
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CENSUS WORKSHEET (1ST Workbook)

Step 4f Age –You do not need to enter anything in here. This is calculated based upon the effective date and county entered in Step 2 and 3 above.

Step 4g Group –This field is to indicate what billing group this employee and family members should be in. The billing group determines the contribution level that the employer is paying for that group. If all under one, please leave it as Group 1 for each person. If under two or more, please use drop down option to chose Group 2 or other options. **This field can be copied down from prior entries if needed, otherwise, choose the drop down menu.**

Step 4h Medical Tier –This field is to indicate what coverage level the employee and/or family members should be under. This field will auto-populate the correct medical tier **if the employee number and enrollee type fields are filled out correctly.** The allowable medical tiers are: EE-only, EE+Sp, EE+Ch(ren), and/or Family.

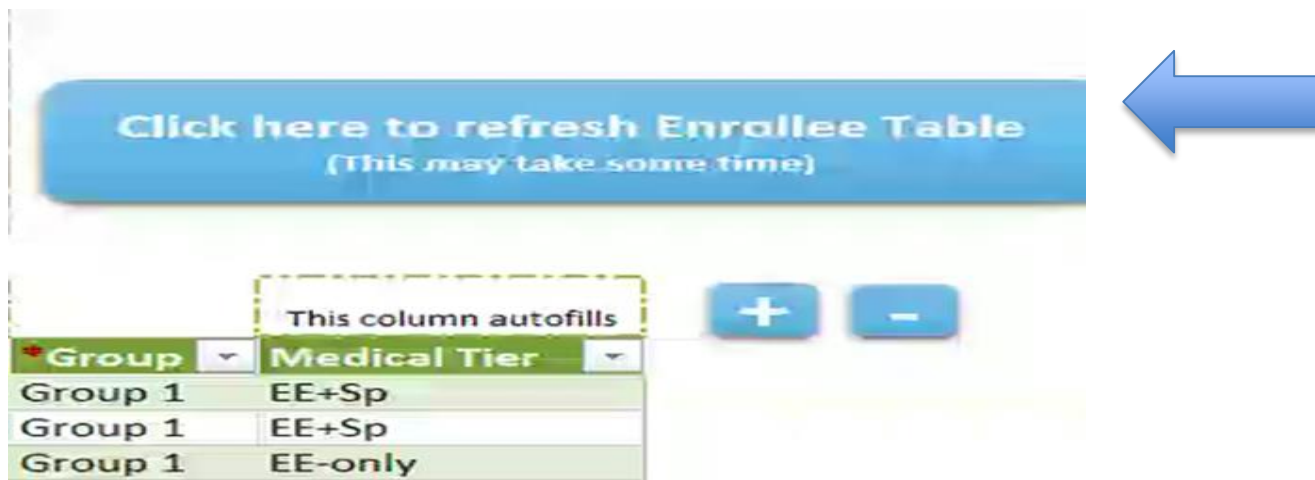
This column autofills		This column autofills	
Age	Group	Medical Tier	

SHOP Quoting Tool

CENSUS WORKSHEET (1ST Workbook)

Step 5 After the census is completed and verified, please click the blue button entitled “Click here to refresh Enrollee Table”. **Please note:** Once this button is selected, it will take a while to refresh. You will see a spinning wheel or other indicator to show that the system is processing it. Please do not do anything until this processing indicator has finished. That spinning wheel will disappear and you can click on any of the other worksheet tabs.

Please note: Any change to this census at any point during this quoting process will require you to click the blue refresh button again to update the workbook.



SHOP Quoting Tool

PLAN SHOPPING TOOL (2ND Workbook)

- The plan shopping tool is the place where the plan options can be reviewed and/or narrowed down.
- At the top, there is a Find a Broker button, that takes the user to the authorized broker list on Maryland Health Connection.
- Below that, there are all the available SHOP plans broken down by metal level.



Find a Broker

2018 Employer Plan Shopping

A Guidance Document for Employers participating in Maryland Health Connection's Small Business Health Options Program

NOTE: You must click the "Click here to compile list" for EACH new comparison

Select all

Deselect all

Click here to compile list

Bronze Plans		Silver Plans		Gold Plans	
<input checked="" type="checkbox"/> Aetna Bronze HMO 5000 80% HSA	<input checked="" type="checkbox"/> UHC Navigate HMO Bronze 5250-2	<input checked="" type="checkbox"/> Aetna Silver HMO 4500 80%	<input checked="" type="checkbox"/> UHC OCI HMO Silver 2000-2	<input checked="" type="checkbox"/> Aetna Gold HMO 2500 90%	<input checked="" type="checkbox"/> UHC Choice Plus POS Gold 1500-2
<input checked="" type="checkbox"/> Aetna Bronze PPO 5000 80/60 HSA	<input checked="" type="checkbox"/> UHC OCI HSA HMO Bronze 4000-2	<input checked="" type="checkbox"/> Aetna Silver PPO 4500 80/60	<input checked="" type="checkbox"/> UHC OCI HSA HMO Silver 2600-2	<input checked="" type="checkbox"/> Aetna Gold PPO 2500 90/70	<input checked="" type="checkbox"/> UHC Choice Plus HSA POS Gold 1500-2
<input checked="" type="checkbox"/> BlueChoice HMO Referral HSA/HRA 5500	<input checked="" type="checkbox"/> UHC OCI HSA HMO Bronze 6650-2	<input checked="" type="checkbox"/> BlueChoice HMO HSA/HRA 2000	<input checked="" type="checkbox"/> UHC Choice HSA EPO Silver 2600-2	<input checked="" type="checkbox"/> BlueChoice HMO 1000	<input checked="" type="checkbox"/> UHC Choice Plus POS Gold 750-2
<input checked="" type="checkbox"/> BluePreferred PPO HSA/HRA 5500 (CFMD)	<input checked="" type="checkbox"/> UHC OCI HMO Bronze 5250-2	<input checked="" type="checkbox"/> BluePreferred PPO HSA/HRA 2000 80%/80% (CFMD)	<input checked="" type="checkbox"/> UHC Choice Plus HSA POS Silver 2250-2	<input checked="" type="checkbox"/> BluePreferred PPO 1000 90%/70%	<input checked="" type="checkbox"/> UHC Core Essential HMO Gold 750-2
<input checked="" type="checkbox"/> KP MD Bronze 5500/50/Dental		<input checked="" type="checkbox"/> BluePreferred PPO HSA/HRA 2000 80%/80% (GHMS)	<input checked="" type="checkbox"/> UHC Choice Plus POS Silver 2000-2	<input checked="" type="checkbox"/> BluePreferred PPO Gold 90%/70%	<input checked="" type="checkbox"/> UHC Choice HSA EPO Gold 1500-2
<input checked="" type="checkbox"/> KP MD Bronze 6550/0%/HSA/Dental		<input checked="" type="checkbox"/> BluePreferred PPO HSA/HRA 5500 (GHMS)	<input checked="" type="checkbox"/> UHC Choice Plus HSA POS Silver 2600-2	<input checked="" type="checkbox"/> KP MD Gold 0/20/Dental	<input checked="" type="checkbox"/> UHC Choice HSA EPO Gold 1400-2
<input checked="" type="checkbox"/> KP MD Bronze 5750/30/20%/HSA/Dental		<input checked="" type="checkbox"/> KP MD Silver 1700/40/Dental		<input checked="" type="checkbox"/> KP MD Gold 1000/20/Dental	
<input checked="" type="checkbox"/> KP MD Bronze 5500/50/POS/Dental		<input checked="" type="checkbox"/> KP MD Silver 2500/40/Dental		<input checked="" type="checkbox"/> KP MD Gold 1400/0%/HSA/Dental	
<input checked="" type="checkbox"/> UHC Choice Plus HSA POS Bronze 4000-2		<input checked="" type="checkbox"/> KP MD Silver 1500/30/HSA/Dental		<input checked="" type="checkbox"/> UHC Choice EPO Gold 1500-2	
<input checked="" type="checkbox"/> UHC Choice HSA EPO Bronze 4000-2		<input checked="" type="checkbox"/> KP MD Silver 2500/30/HSA/Dental		<input checked="" type="checkbox"/> UHC OCI HMO Gold 750-2	
<input checked="" type="checkbox"/> UHC Choice HSA EPO Bronze 6650-2		<input checked="" type="checkbox"/> UHC Choice HSA EPO Silver 2250-2		<input checked="" type="checkbox"/> UHC OCI HMO Gold 1500-2	
<input checked="" type="checkbox"/> UHC Choice EPO Bronze 5250-2		<input checked="" type="checkbox"/> UHC Choice EPO Silver 2000-2		<input checked="" type="checkbox"/> UHC Choice HSA EPO Gold 1400-4	
<input checked="" type="checkbox"/> UHC Core Essential HSA HMO Bronze 4000-2		<input checked="" type="checkbox"/> UHC Choice HSA EPO Silver 2000-2		<input checked="" type="checkbox"/> UHC OCI HSA HMO Gold 1400-2	

SHOP Quoting Tool

PLAN SHOPPING TOOL (2ND Workbook)

- **Step 1 – Review Plan Options** The user has the option to Select All to choose all available plans or to Deselect All to clear all current selections. The user can also click the checkbox next to each individual plan to choose plans on an individual basis. MHBE would recommend narrowing down the plan options to display on the comparison page.
 - To do this, the user can view example premium rates for each plan by scrolling to the bottom of the page. The example rates given here are for an Employee age 35, with a spouse age 35 and one child age 10.
 - The user should limit the plan selections to 4 or 5 plans at the maximum for best visibility in the Comparison page that will be generated.
- **Step 2n – Pick Plans to Compare** The second step is choose the plans you'd want to generate a comparison for. The default option is all plans, so you'd have to click Deselect All to clear the default. Then you can click on each individual plan's checkbox next to their name. Or the user may keep the default All Plans option.

SHOP Quoting Tool

PLAN SHOPPING TOOL (2ND Workbook)



Find a Broker

2018 Employer Plan Shopping

A Guidance Document for Employers participating in Maryland Health Connection's Small Business Health Options Program

NOTE: You must click the "Click here to compile list" for EACH new comparison

Select all

Deselect all

Click here to compile list

Bronze Plans

<input checked="" type="checkbox"/> Aetna Bronze HMO \$000 80% HSA	<input checked="" type="checkbox"/> UHC Navigate HMO Bronze \$250-2
<input checked="" type="checkbox"/> Aetna Bronze PPO \$000 80/60 HSA	<input checked="" type="checkbox"/> UHC OCI HSA HMO Bronze 4000-2
<input checked="" type="checkbox"/> BlueChoice HMO Referral HSA/HRA \$500	<input checked="" type="checkbox"/> UHC OCI HSA HMO Bronze 6650-2
<input checked="" type="checkbox"/> BluePreferred PPO HSA/HRA \$500 (CFMD)	<input checked="" type="checkbox"/> UHC OCI HMO Bronze \$250-2
<input checked="" type="checkbox"/> KP MD Bronze \$500/50/Dental	
<input checked="" type="checkbox"/> KP MD Bronze 6550/0%/HSA/Dental	
<input checked="" type="checkbox"/> KP MD Bronze \$750/30/20%/HSA/Dental	
<input checked="" type="checkbox"/> KP MD Bronze \$500/50/POS/Dental	
<input checked="" type="checkbox"/> UHC Choice Plus HSA POS Bronze 4000-2	
<input checked="" type="checkbox"/> UHC Choice HSA EPO Bronze 4000-2	
<input checked="" type="checkbox"/> UHC Choice HSA EPO Bronze 6650-2	
<input checked="" type="checkbox"/> UHC Choice EPO Bronze \$250-2	

Silver Plans

<input checked="" type="checkbox"/> Aetna Silver HMO 4500 80%	<input checked="" type="checkbox"/> UHC OCI HMO Silver 2000-2
<input checked="" type="checkbox"/> Aetna Silver PPO 4500 80/60	<input checked="" type="checkbox"/> UHC OCI HSA HMO Silver 2600-2
<input checked="" type="checkbox"/> BlueChoice HMO HSA/HRA 2000	<input checked="" type="checkbox"/> UHC Choice HSA EPO Silver 2600-2
<input checked="" type="checkbox"/> BluePreferred PPO HSA/HRA 2000 80%/60% (CFMD)	<input checked="" type="checkbox"/> UHC Choice Plus HSA POS Silver 2250-2
<input checked="" type="checkbox"/> BluePreferred PPO HSA/HRA 2000 80%/60% (GHMS)	<input checked="" type="checkbox"/> UHC Choice Plus POS Silver 2000-2
<input checked="" type="checkbox"/> BluePreferred PPO HSA/HRA \$500 (GHMS)	<input checked="" type="checkbox"/> UHC Choice Plus HSA POS Silver 2600-2
<input checked="" type="checkbox"/> KP MD Silver 1700/40/Dental	
<input checked="" type="checkbox"/> KP MD Silver 2500/40/Dental	
<input checked="" type="checkbox"/> KP MD Silver 1500/30/HSA/Dental	
<input checked="" type="checkbox"/> KP MD Silver 2500/30/HSA/Dental	
<input checked="" type="checkbox"/> UHC Choice HSA EPO Silver 2250-2	
<input checked="" type="checkbox"/> UHC Choice EPO Silver 2000-2	

Gold Plans

<input checked="" type="checkbox"/> Aetna Gold HMO 2500 90%	<input checked="" type="checkbox"/> UHC Choice Plus POS Gold 1500-2
<input checked="" type="checkbox"/> Aetna Gold PPO 2500 90/70	<input checked="" type="checkbox"/> UHC Choice Plus HSA POS Gold 1500-2
<input checked="" type="checkbox"/> BlueChoice HMO 1000	<input checked="" type="checkbox"/> UHC Choice Plus POS Gold 750-2
<input checked="" type="checkbox"/> BluePreferred PPO 1000 90%/70%	<input checked="" type="checkbox"/> UHC Core Essential HMO Gold 750-2
<input checked="" type="checkbox"/> BluePreferred PPO Gold 90%/70%	<input checked="" type="checkbox"/> UHC Choice HSA EPO Gold 1500-2
<input checked="" type="checkbox"/> KP MD Gold 0/20/Dental	<input checked="" type="checkbox"/> UHC Choice HSA EPO Gold 1400-2
<input checked="" type="checkbox"/> KP MD Gold 1000/20/Dental	
<input checked="" type="checkbox"/> KP MD Gold 1400/0%/HSA/Dental	
<input checked="" type="checkbox"/> UHC Choice EPO Gold 1500-2	
<input checked="" type="checkbox"/> UHC OCI HMO Gold 750-2	
<input checked="" type="checkbox"/> UHC OCI HMO Gold 1500-2	
<input checked="" type="checkbox"/> UHC Choice HSA EPO Gold 1400-4	

- Note:** This plan names listed reflect some benefits to the quoting tool user. The first part is the carrier name, the second part is the type of plan (ie HMO, PPO) and the third part is the individual deductible amount. Some carriers may provide a copayment or coinsurance amount in the title of the plan.
- Note:** This page's refresh button is "Click here to compile list". If any changes are made here, the user should click this orange button again. The user should also click on the green button "Generate Comparison and Employee Premium Table Tab" if changes are made on the plan shopping tool.

SHOP Quoting Tool

PLAN SHOPPING TOOL (2ND Workbook)

Step 3 The third step is to click the orange button “Click here to compile list”.

maryland health connection

Find a Broker

2018 Employer Plan Shopping

A Guidance Document for Employers participating in Maryland Health Connection's Small Business Health Options Program

NOTE: You must click the "Click here to compile list" for EACH new comparison

Select all Deselect all **Click here to compile list**

Bronze Plans		Silver Plans		Gold Plans	
<input checked="" type="checkbox"/> Aetna Bronze HMO \$000 80% HSA	<input checked="" type="checkbox"/> UHC Navigate HMO Bronze \$250-2	<input checked="" type="checkbox"/> Aetna Silver HMO 4500 80%	<input checked="" type="checkbox"/> UHC OCI HMO Silver 2000-2	<input checked="" type="checkbox"/> Aetna Gold HMO 2500 90%	<input checked="" type="checkbox"/> UHC Choice Plus POS Gold 1500-2
<input checked="" type="checkbox"/> Aetna Bronze PPO \$000 80/60 HSA	<input checked="" type="checkbox"/> UHC OCI HSA HMO Bronze 4000-2	<input checked="" type="checkbox"/> Aetna Silver PPO 4500 80/60	<input checked="" type="checkbox"/> UHC OCI HSA HMO Silver 2600-2	<input checked="" type="checkbox"/> Aetna Gold PPO 2500 90/70	<input checked="" type="checkbox"/> UHC Choice Plus HSA POS Gold 1500-2
<input checked="" type="checkbox"/> BlueChoice HMO Referral HSA/HRA \$500	<input checked="" type="checkbox"/> UHC OCI HSA HMO Bronze 6650-2	<input checked="" type="checkbox"/> BlueChoice HMO HSA/HRA 2000	<input checked="" type="checkbox"/> UHC Choice HSA EPO Silver 2600-2	<input checked="" type="checkbox"/> BlueChoice HMO 1000	<input checked="" type="checkbox"/> UHC Choice Plus POS Gold 750-2
<input checked="" type="checkbox"/> BluePreferred PPO HSA/HRA \$500 (CFMD)	<input checked="" type="checkbox"/> UHC OCI HMO Bronze \$250-2	<input checked="" type="checkbox"/> BluePreferred PPO HSA/HRA 2000 80%/60% (CFMD)	<input checked="" type="checkbox"/> UHC Choice Plus HSA POS Silver 2250-2	<input checked="" type="checkbox"/> BluePreferred PPO 1000 90%/70%	<input checked="" type="checkbox"/> UHC Core Essential HMO Gold 750-2
<input checked="" type="checkbox"/> KP MD Bronze \$500/50/Dental		<input checked="" type="checkbox"/> BluePreferred PPO HSA/HRA 2000 80%/60% (GHM5)	<input checked="" type="checkbox"/> UHC Choice Plus POS Silver 2000-2	<input checked="" type="checkbox"/> BluePreferred PPO Gold 90%/70%	<input checked="" type="checkbox"/> UHC Choice HSA EPO Gold 1500-2
<input checked="" type="checkbox"/> KP MD Bronze 6550/0%/HSA/Dental		<input checked="" type="checkbox"/> BluePreferred PPO HSA/HRA \$500 (GHM5)	<input checked="" type="checkbox"/> UHC Choice Plus HSA POS Silver 2600-2	<input checked="" type="checkbox"/> KP MD Gold 0/20/Dental	<input checked="" type="checkbox"/> UHC Choice HSA EPO Gold 1400-2
<input checked="" type="checkbox"/> KP MD Bronze 5750/30/20%/HSA/Dental		<input checked="" type="checkbox"/> KP MD Silver 1700/40/Dental		<input checked="" type="checkbox"/> KP MD Gold 1000/20/Dental	
<input checked="" type="checkbox"/> KP MD Bronze \$500/50/POS/Dental		<input checked="" type="checkbox"/> KP MD Silver 2500/40/Dental		<input checked="" type="checkbox"/> KP MD Gold 1400/0%/HSA/Dental	
<input checked="" type="checkbox"/> UHC Choice Plus HSA POS Bronze 4000-2		<input checked="" type="checkbox"/> KP MD Silver 1500/30/HSA/Dental		<input checked="" type="checkbox"/> UHC Choice EPO Gold 1500-2	
<input checked="" type="checkbox"/> UHC Choice HSA EPO Bronze 4000-2		<input checked="" type="checkbox"/> KP MD Silver 2500/30/HSA/Dental		<input checked="" type="checkbox"/> UHC OCI HMO Gold 750-2	
<input checked="" type="checkbox"/> UHC Choice HSA EPO Bronze 6650-2		<input checked="" type="checkbox"/> UHC Choice HSA EPO Silver 2250-2		<input checked="" type="checkbox"/> UHC OCI HMO Gold 1500-2	
<input checked="" type="checkbox"/> UHC Choice EPO Bronze \$250-2		<input checked="" type="checkbox"/> UHC Choice EPO Silver 2000-2		<input checked="" type="checkbox"/> UHC Choice HSA EPO Gold 1400-4	

Step #4 Click the green “Generate Comparison & Employee Premium Table Tab” to generate the comparison page for your employer/employees on an individual and group comparison level. This finalization will take a while, please wait for the processing indicator to stop spinning.

[illegible]

SHOP Quoting Tool

PLAN SHOPPING TOOL (2ND Workbook)

The system will generate a new workbook tab entitled “Comparison”.

SHOP_tool_draft - Copy (4) - Excel



Rebecca Smith

FILE HOME INSERT PAGE LAYOUT FORMULAS DATA REVIEW VIEW ACROBAT

Calibri 11 A A B I U A Merge & Center \$ % , .00 0.0

Clipboard Font Alignment Number Styles Cells Editing

D7 =SUMIFS(Table_EmployeeTable_1[["All"],[BlueChoice HMO HSA/HRA 2000]],Table_EmployeeTable_1[["All"],[*Employee Number]],SH\$2)

		COMPANY: ABC Company		EMPLOYER SELECTED PLAN: BlueChoice HMO HSA/HRA 2000	
		EMPLOYEE: Employee A		DEPENDENTS: #N/A	
BASIC PLAN INFORMATION Small Group Premiums: Premiums vary by age and family size. The premiums for small employers will depend on the employees who will be covered. Health Savings Accounts (HSAs): A Health Savings Account-qualified plan allows you to contribute to a separate tax-exempt account which can be used for health care expenses like deductibles and copayments.		Insurance Company: CareFirst Blue Choice		Group Hospitalization and Medical Services, Inc.	
HOW YOU GET YOUR CARE Some insurers offer plans that include a smaller number of providers that the insurers have decided offer high-quality care at a lower cost. Plans have different monthly premiums and out-of-pocket costs for care, as well as different providers (like doctors and hospitals) you can visit. The providers included in a plan's network.		Plan Name: BlueChoice HMO HSA/HRA 2000		BluePreferred PPO Silver 2000-2	
Plan Level: SILVER		SILVER		GOLD	
Plan Type: HMO		PPO		SILVER	
Total Monthly Premium: \$0		\$0		\$0	
Employee Monthly Premium: #N/A		#N/A		#N/A	
HSA Qualified:		✓		✓	
Referral Required:		✓		✓	

Plan Overview


Comparison Employee Rate 100% Contributions

READY

SHOP Quoting Tool

COMPARISON TAB (generated workbook tab)

- The Comparison Workbook will display all of the plans selected on the Plan Shopping Tool workbook.
- The rates displayed are per each employee entered. To change the employee shown, click the drop-down menu in the green box next to “Employee” at the top of the page and choose the employee the user wishes to display.
- The dependents box will only list the number of non-spouse dependents the employee has.
- The Plan URL row provides a link to the Summary of Benefits and Coverage for each plan.



Print to PDF

COMPANY:

ABC Company

EMPLOYEE:

Rob Schind

DEPENDENTS:

0

EMPLOYER SELECTED PLAN:

B

EMPLOYER CONTRIBUTION:

BASIC PLAN INFORMATION

Group Premiums: Premiums vary by individual and family size. The premiums for small groups will depend on the employees who will be covered.

Savings Accounts (HSAs): A Health Savings Account-qualified plan allows you to contribute to a separate tax-exempt account that can be used for health care expenses like deductibles and copayments.

HOW YOU GET YOUR CARE

Insurers offer plans that include a smaller number of providers that the insurers have selected to offer high-quality care at a lower cost. Some have different monthly premiums and out-of-pocket costs for care, as well as different network providers (like doctors and hospitals) you can use. Some are included in a plan's network.

Plan Overview

Insurance Company:	CareFirst Blue Choice	CareFirst of Maryland	United Healthcare Insurance Company	Group Hospitalization and Medical Services, Inc.	Kaiser	CareFirst of Maryland
Plan Name:	BlueChoice HMO HSA/HRA 2000	BluePreferred PPO HSA/HRA 2000 80%/60%	UHC Choice Plus POS Silver 2000-2	BluePreferred PPO Gold 90%/70%	KP MD Silver 1700/40/Dental	BluePreferred PPO HSA/HRA 5500
Plan Level:	SILVER	SILVER	SILVER	GOLD	SILVER	BRONZE
Plan Type:	HMO	PPO	POS	PPO	HMO	PPO
Total Monthly Premium:	\$545	\$671	\$543	\$658	\$495	\$579
Employee Monthly Premium:	\$345	\$471	\$343	\$658	\$295	\$379
HSA Qualified:	✓	✓				✓
Referral Required:					✓	

SHOP Quoting Tool

COMPARISON TAB (generated workbook tab)

- The Total Monthly Premium represents the total premium for the plan shown.

MD_SHOP_tool_PY2019 v7 (7) - Excel

Rebecca Smith

FILE HOME INSERT PAGE LAYOUT FORMULAS DATA REVIEW VIEW ACROBAT

Normal Page Break Preview Custom Views Ruler Formula Bar Gridlines Headings Zoom 100% Zoom to Selection New Window Arrange All Freeze Panes Split Hide View Side by Side Synchronous Scrolling Reset Window Position Switch Windows Macros

COMPANY: Sample

EMPLOYEE: Employee A

SPOUSE & DEPENDENTS: #N/A

BASIC PLAN INFORMATION
Cost-Sharing Display: Unless otherwise indicated, all benefits displayed show cost-sharing for In-Network services. Please review the linked Summary of Benefits for more detailed plan information.
Small Group Premiums: Premiums vary by age and family size. The premiums for small employers will depend on the employees who will be covered.

Insurance Company: Kaiser Optimum Choice, Inc. Aetna Life Insurance Co. CareFirst Blue Choice

Plan Name: KP MD Silver 2500/40/Dental UHC OCI HMO Silver 5000-2 Aetna Gold OAEPO 2500 90% BlueChoice HMO HSA/HR 2250

Plan Overview

Insurance Company:	Kaiser	Optimum Choice, Inc.	Aetna Life Insurance Co.	CareFirst Blue Choice	Group Hospitalization and Medical Services, Inc.
Plan Name:	KP MD Silver 2500/40/Dental	UHC OCI HMO Silver 5000-2	Aetna Gold OAEPO 2500 90%	BlueChoice HMO HSA/HR 2250	BluePreferred PPO HSA/HR 2250 80%/60% (GHMS)
Plan Level:	SILVER	SILVER	GOLD	SILVER	SILVER
Plan Type:	HMO	HMO	PPO	HMO	PPO
Total Monthly Premium:	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
HSA Qualified:			✓		✓

Census Plan Shopping Tool **Comparison0** Enrollee Rate Table0


READY


75%

SHOP Quoting Tool

COMPARISON TAB (generated workbook tab)

- The Comparison workbook can be printed to a PDF format. When the user clicks the Print to PDF green button, a window will pop up allowing you to save the PDF to a chosen folder on your computer.
- If the user wishes to save this Comparison PDF for each employee, the user should change the Employee displayed by switching the choice from the drop down menu provided in the top middle of the page. Then the Print to PDF green button can be saved again for each employee.





COMPANY: ABC Company

EMPLOYEE: Rob Schind

DEPENDENTS: 0

EMPLOYER SELECTED

EMPL CONTRIBUTION

BASIC PLAN INFORMATION									
<p>Health Savings Accounts (HSAs): A Health Savings Account-qualified plan allows you to contribute to a separate tax-exempt account that can be used for health care expenses like deductibles and copayments.</p>		Insurance Company:		CareFirst Blue Choice	CareFirst of Maryland	United Healthcare Insurance Company	Group Hospitalization and Medical Services, Inc.	Kaiser	CareFirst of Maryland
		Plan Name:		BlueChoice HMO HSA/HRA 2000	BluePreferred PPO HSA/HRA 2000 80%/60%	UHC Choice Plus POS Silver 2000-2	BluePreferred PPO Gold 90%/70%	KP MD Silver 1700/40/Dental	BluePreferred PPO HSA/HRA 550
		Plan Level:		SILVER	SILVER	SILVER	GOLD	SILVER	BRONZE
		Plan Type:		HMO	PPO	POS	PPO	HMO	PPO

SHOP Quoting Tool

EMPLOYER (PREMIUM) RATE TABLE (generated workbook)

- This workbook page will be generated after you click to Generate the Comparison and Employee Rate Table button on the Plan Shopping Tool workbook.
- This page will summarize the monthly premium for each employee in one chart format, based upon the selected plans in the Plan Shopping Tool workbook.
- Each premium is displayed broken down by Employee, Spouse and Dependent(s). The amount is not rounded up as currently displayed on the Comparison page.

Employee Name	Enrollee Type	Medical Tier	BlueChoice HMO HSA/HRA 2000	BluePreferred PPO HSA/HRA 2000 80%/60%	UHC Choice Plus POS Silver 2000-2
Rob Schmidt	Employee	EE-only	545.07	671.45	543.
Joe Smith	Employee	EE+Sp	521.55	642.48	519.
Candy Smith	Spouse	EE+Sp	354.03	436.11	352.

SHOP Quoting Tool

COMPARISON AND EMPLOYEE PREMIUM TABLE NOTES

- If additional changes are needed to be made in any of the workbooks, all pages with changes need to be refreshed and then click on the “Generate Comparison and Employee Premium Table Tab” to generate a new workbook with the reflected changes. Do not delete any of the workbooks generated and click to proceed through any run time errors that may develop. The resulting Comparison and Employee Rate Table page should reflect the changes made. If not, please contact MD SHOP with questions.
- The new workbook will generate with a 1 at the end of the tab name. Each additional running of this Comparison page will create a new workbook with a consecutive naming mechanism, ie Comparion1, Comparison2.