Quick Start Guide

Here you'll find answers to some commonly asked questions and basic troubleshooting steps. If you need further assistance or have questions not covered here, please reach out to your Administrator for more information.

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www.quotit.com

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customer.support@quotit.com

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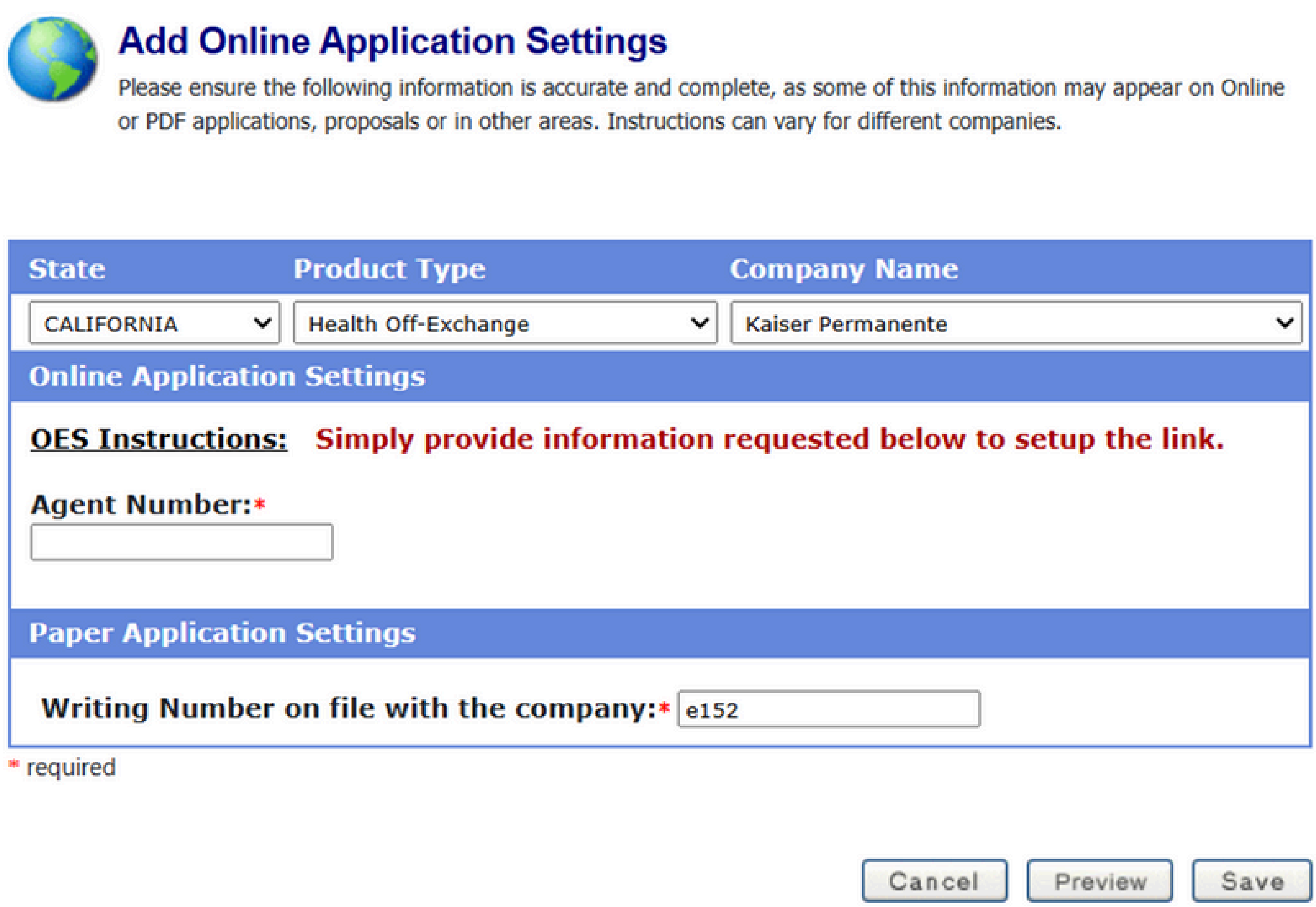
1. What is OES?

The Online Enrollment System (OES) allows you to complete and submit online applications directly through Quotit.
Note: Not all carriers are integrated with OES. Some require manual steps.

To check if a carrier is integrated:

1. Go to Settings > Online Application Links
2. Click Add
3. Select your desired Product Type, State, and Carrier

If the carrier supports OES, you'll see "OES Instructions" listed. For example, with Kaiser CA Off Exchange, simply enter the required information, and Quotit will generate the OES application for you.



Add Online Application Settings

Please ensure the following information is accurate and complete, as some of this information may appear on Online or PDF applications, proposals or in other areas. Instructions can vary for different companies.

State	Product Type	Company Name
CALIFORNIA	Health Off-Exchange	Kaiser Permanente

Online Application Settings

OES Instructions: Simply provide information requested below to setup the link.

Agent Number:*

Paper Application Settings

Writing Number on file with the company:* e152

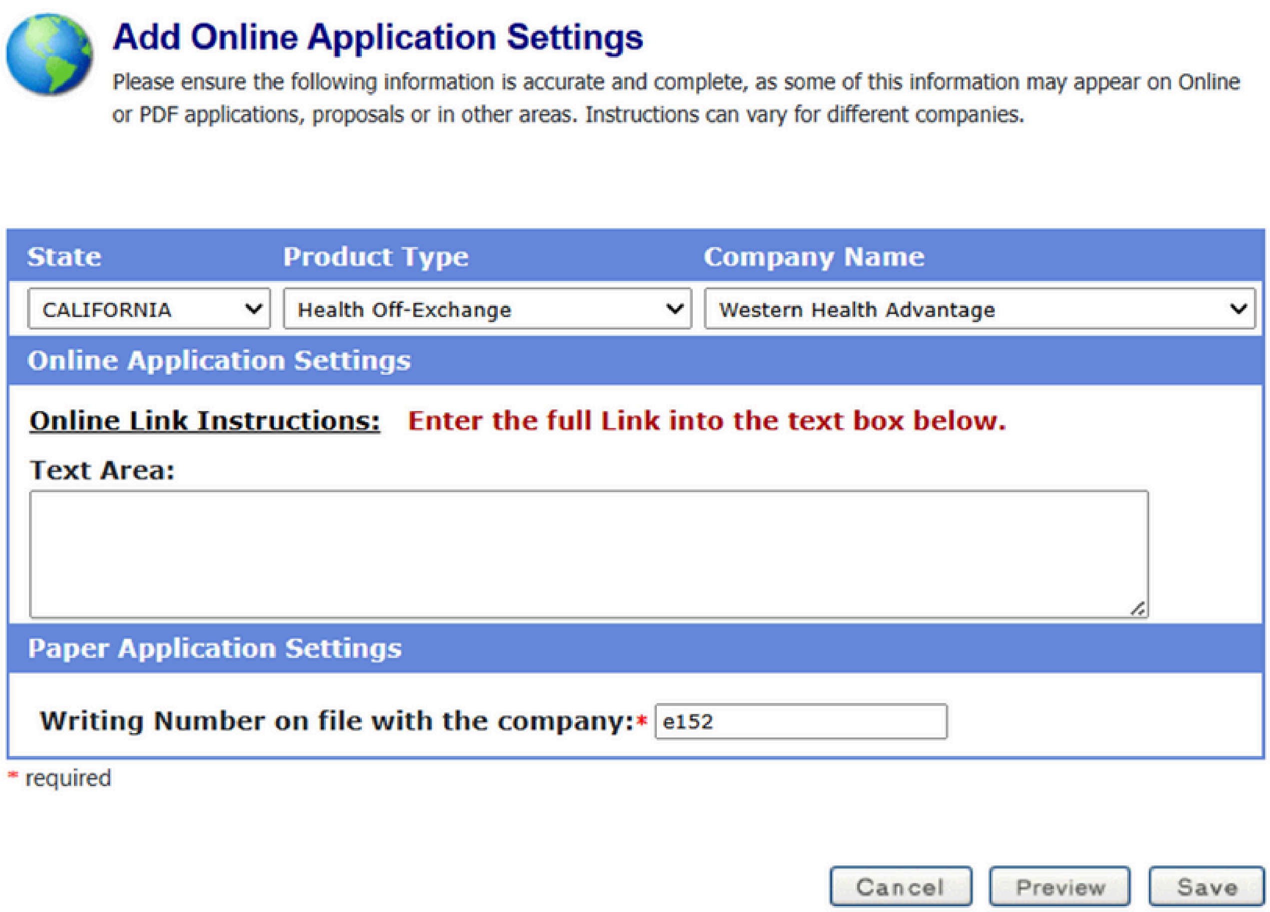
* required

Cancel Preview Save

Non-Integrated Carriers – Online Link Instructions:

For carriers that are not integrated with Quotit, you'll see “Online Link Instructions” instead of OES. In these cases, you’ll be prompted to enter a URL that redirects your applicant to the carrier’s site to complete the application. You can typically find this application link in your Agent Portal provided by the carrier.

Example: For Western Health Advantage CA Off Exchange, you’ll need to enter the specific application URL from your agent portal to enable the online enrollment process.



2. What is A Pending Application?

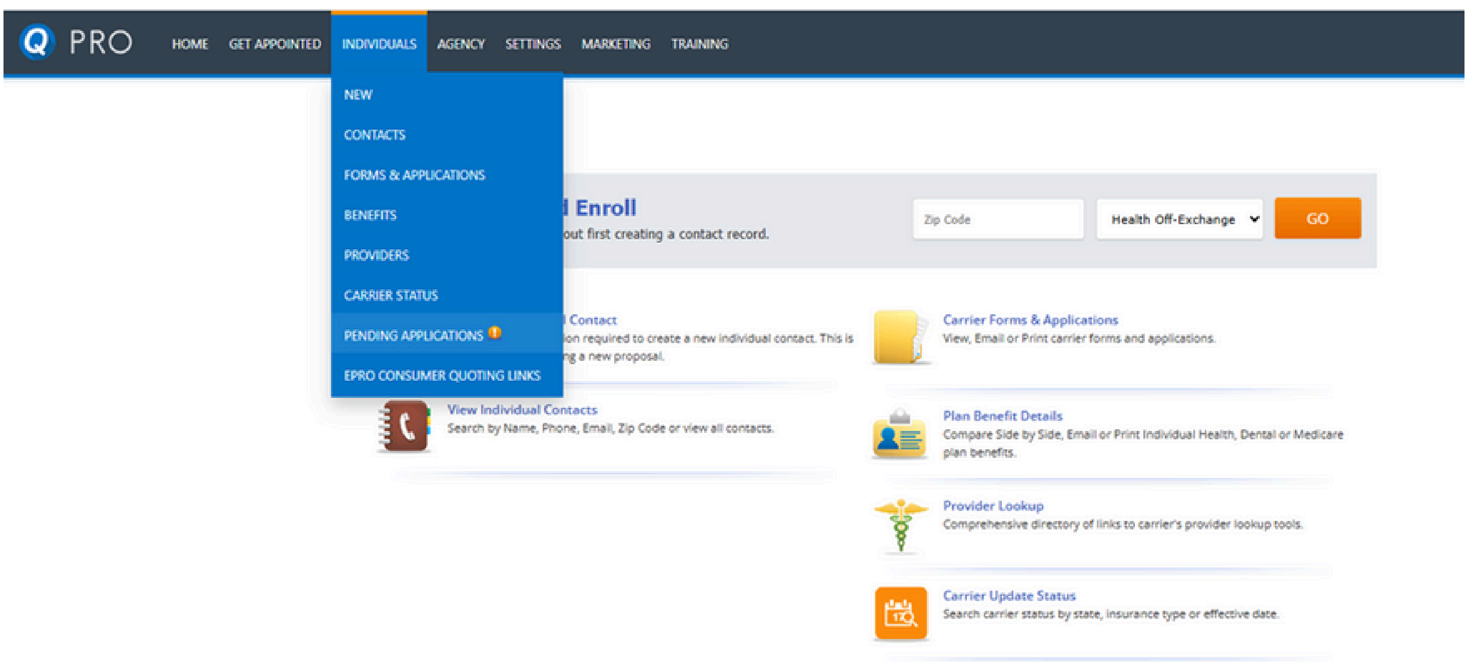
A pending application refers to an application that has not yet been submitted to the carrier because it's missing a key requirement. This status can occur due to Missing Settings Information – Your account may be missing either:

- Online Application Links, or
- Agent of Record (AOR) IDs

Until these are completed, the application remains in a pending state and is not sent to the insurance carrier.

Important Note: Even if the application is filled out, it can expire if not submitted on time. It's especially critical to monitor pending applications around key deadlines (e.g., the 15th or end of the month).

Recommendation: Regularly check your pending applications to avoid delays or missed opportunities for coverage.



3. What does this application status mean?

Sent to Broker: The applicant's information has been captured in a PDF format.
The broker can:

- Download the PDF and apply directly through the carrier, or
- Ask the applicant to reapply directly on the carrier's website.

Transmitting to Carrier: The application is currently being submitted to the carrier. This means submission has started, but it hasn't yet been confirmed as received by the carrier.

Processed/Submitted: The application has been successfully sent to the carrier. It is now in the underwriting review phase with the carrier.

Pending Signature: The application has been completed but is missing the applicant's. The application cannot be submitted to the carrier until the applicant signs it electronically. Be sure to follow up with the client promptly to avoid delays in submission.

Pending Attestation: The application requires attestation or confirmation of the broker's Agent of Record (AOR) IDs. Once completed, the application can be sent to the carrier.

OES Registration Pending: The applicant has not yet registered for an OES (Online Enrollment System) account. Registration is required to proceed with completing and submitting the online application.

Carrier Online Redirect: The applicant has been redirected to the carrier's application site via the Online Application Link configured in your Settings.

Expired: The application has expired and can no longer be submitted. A new application must be completed. Note: Applications typically expire after the Open Enrollment Period (OEP) or Special Enrollment Period (SEP) ends.

4. What carriers are available on your system?

There are a couple ways to view [what carriers are available on our system]:

- Home > Carrier Status will allow you to view carriers filtered by state, product and effective date.
- Settings > Select Your Plans.

5. What is the difference between a consumer and a proposal site?

Navigate to Settings > Select Your Plans you'll see two tabs: Consumer Quoting and Proposal Site.

Proposal Site: This refers to the platform you're currently using: quotit.net. It's designed for agents and brokers to:

- Quote insurance plans
- Build and customize proposals
- Manage client information directly within the system

Consumer Quoting: This applies to quoting done outside of logging into quotit.net, typically by the consumer themselves. It usually involves tools like an ePro link, which:

- You can share with clients
- Allows them to browse and quote plans independently
- Still ties back to your account for tracking and submissions

An ePro link will enable your prospects to run their own quotes without speaking to you first.

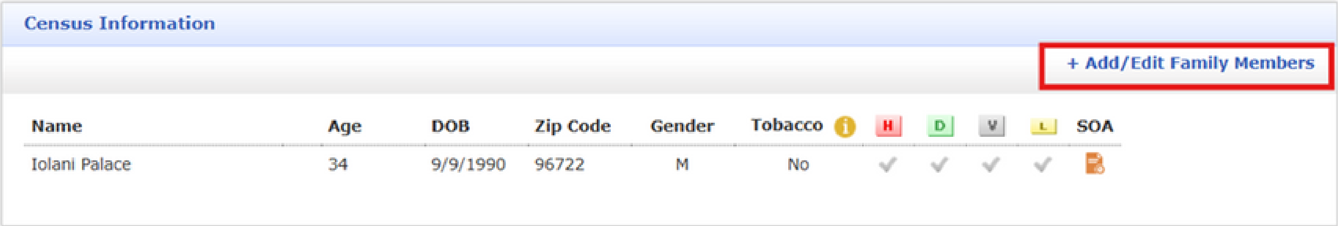
Note: When setting up ePro links within your website, please ensure that your domain is whitelisted with us to avoid any access or functionality issues.

6. Why can’t I see a specific carrier on a quote?

If a carrier is missing from your quote options, please check the following:

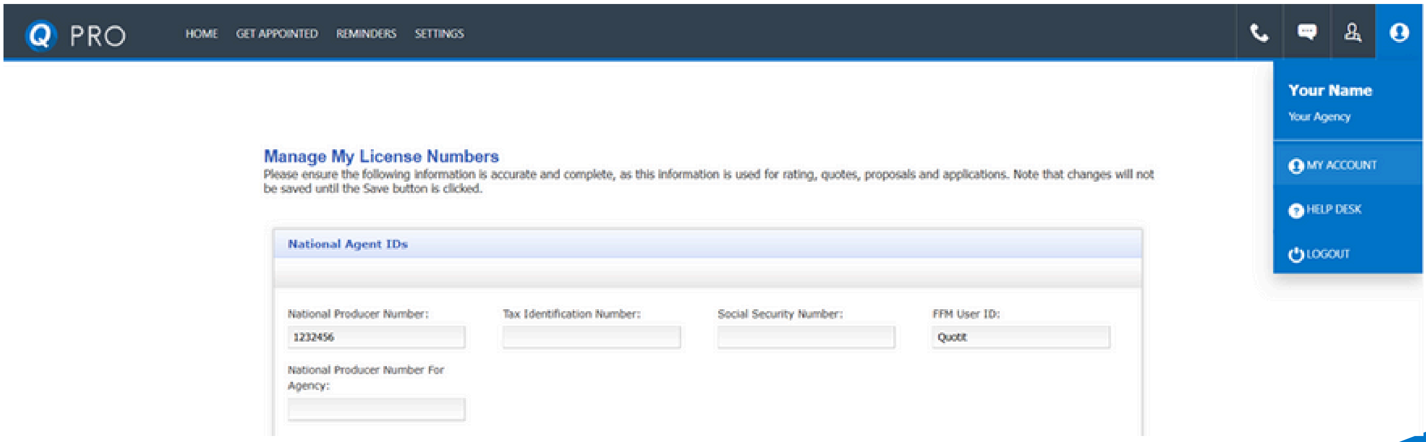
- Verify Contact Information: Ensure your contact’s census details are correct.
- Confirm the ZIP code and date of birth (DOB) are accurate, and in some cases that the county is correct.

If updates are needed, click "Add/Edit Family Members" to make changes.



Carrier Authorization Requirements: Some carriers, like Allstate, require prior authorization to quote.
To gain access, go to My Account > My License Numbers and enter your NPN (National Producer Number).

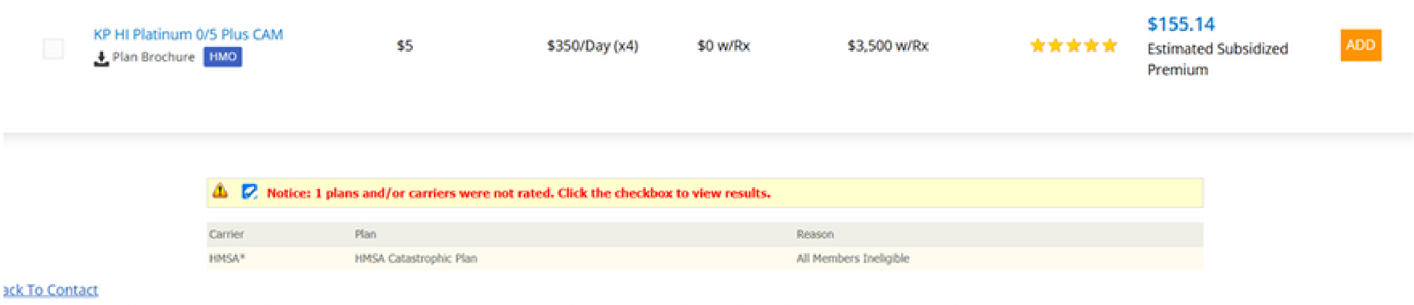
Access to On Exchange Applications:
Entering your FFM (Federally Facilitated Marketplace) user ID will enable access to On Exchange applications.



Check Coverage Notices:

- At the bottom of the quote page, look for a notice regarding eligibility or coverage area.
- Clicking the checkbox will show if your contact is outside the carrier's coverage area or not eligible for the plan.

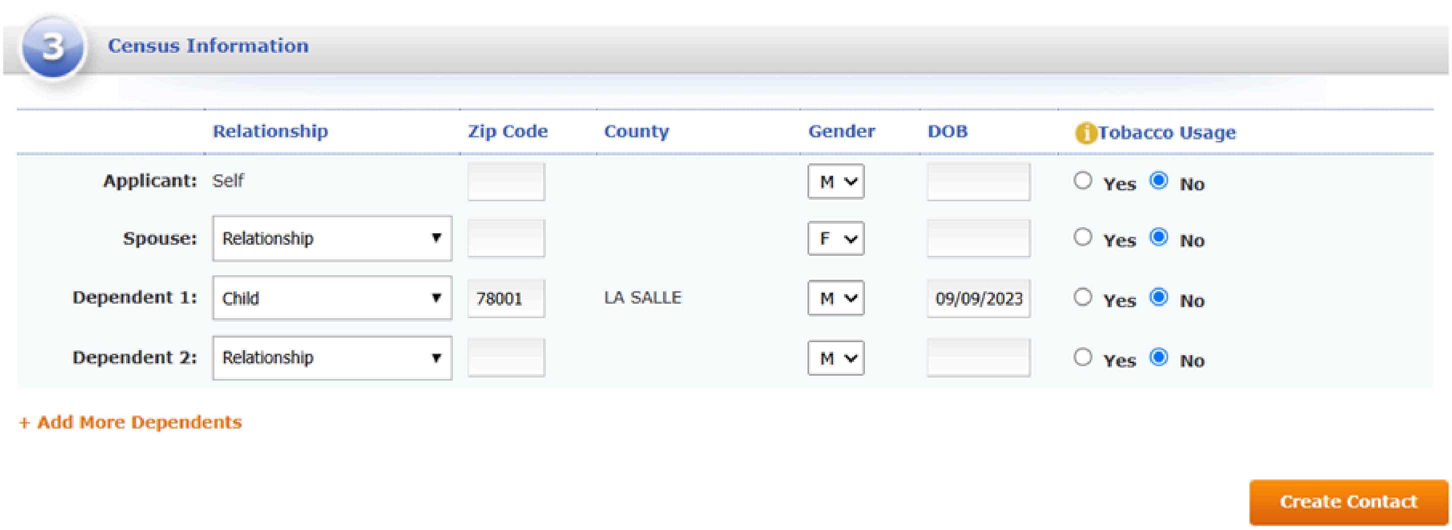
Note: Our team will automatically remove plans from the platform when instructed to do so by carriers—this includes products that are non-commissionable or otherwise restricted.



7. How do I run a Child-Only quote?

To create a child-only quote:

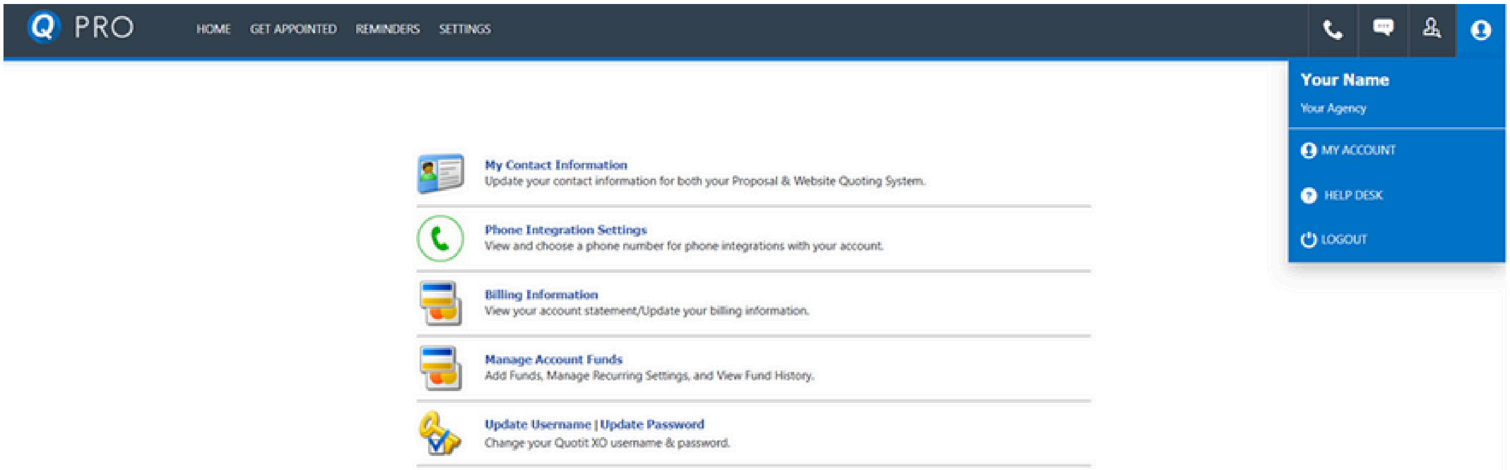
- Enter the child's date of birth (DOB) under Dependent 1.
- Set the relationship to Child.
- Leave the Applicant: Self row blank—do not enter any information there.



8. How can I update my billing information or change my username/password?

To update your billing information or change your username/password:

1. Go to the My Account section located in the upper right-hand corner of Quotit.
2. Select either "Billing Information" to update your payment details or "Update Username" to change your username.
3. Follow the prompts to save your changes.



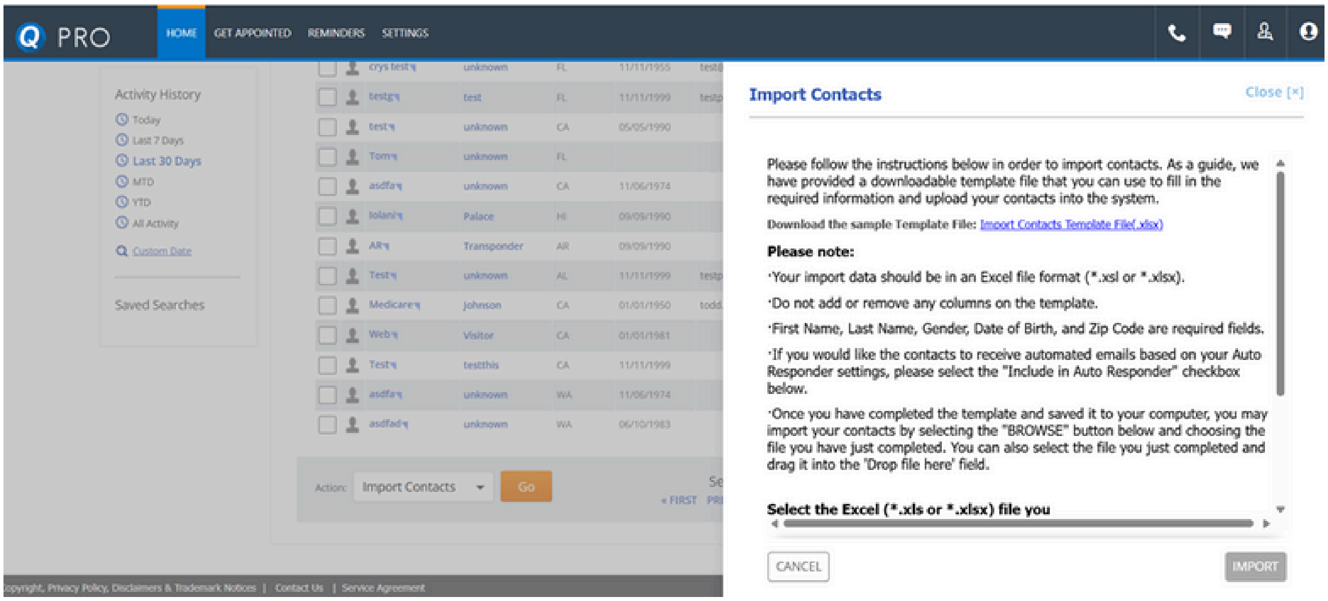
9. How can I import or export contacts? How do I delete contacts?

To access several contact management options:

1. Go to Home > Contacts
2. Scroll to the bottom of the page until you see the Actions section
3. Click on Actions to open a dropdown menu with the following options:
   - Import Contacts
   - Delete
   - Export

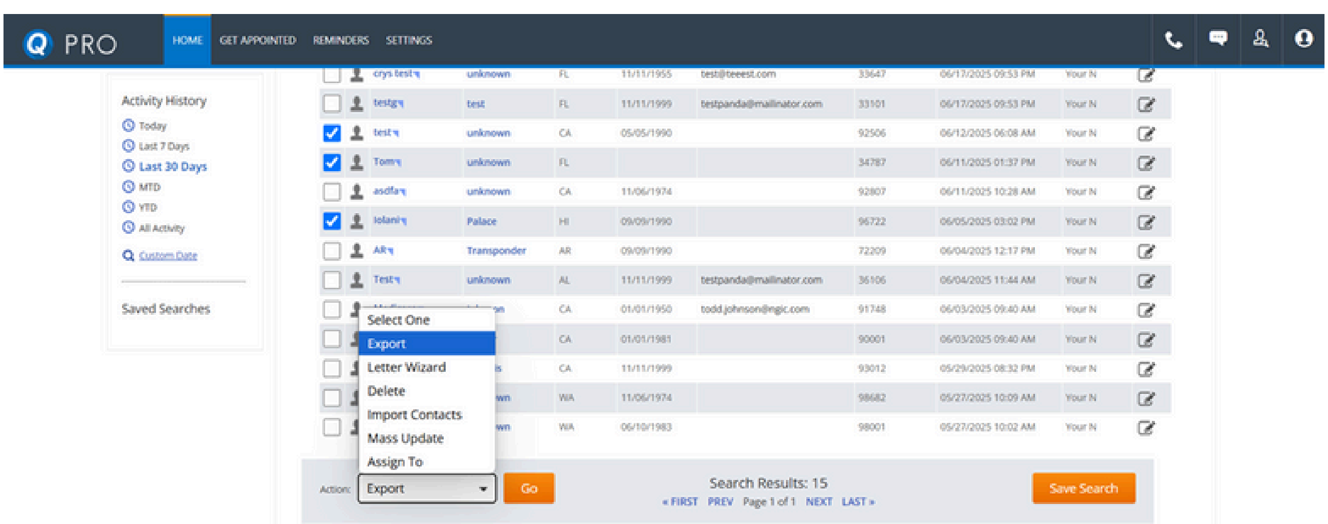
To import contacts:

1. Click “Import Contacts Template File” to download our Excel template.
2. Fill in the required fields in the sheet.
3. Be sure to read the note included in the template—it provides important instructions for completing the import correctly.



To export contacts from your list:

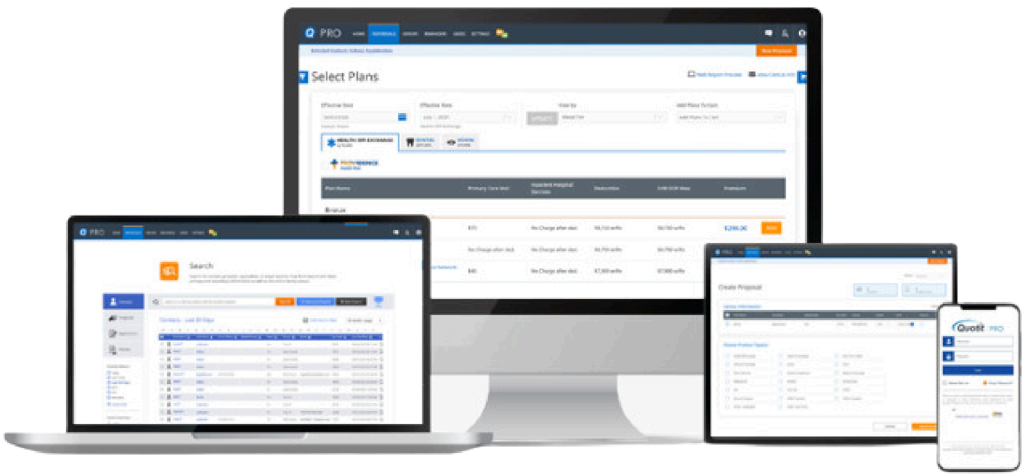
1. Navigate to Home > Contacts.
2. Use the checkboxes next to each contact's name to select the ones you want to export.
3. Once your desired contacts are selected, go to Actions > Export > Go to begin the export process.



To delete contacts:

1. Go to Home > Contacts.
2. Check the box next to each contact you want to delete.
3. Open the Actions dropdown menu.
4. Select Delete, then click Go to complete the deletion.

⚠️ Note: Deleting any contacts will be permanent, so please double-check your selections before proceeding.



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