Quick and Easy
Online Quoting
for Your New Small Groups

As a PacificSource appointed agent, you have the ability to generate online insurance quotes for your small-group clients.

Advantages of Online Quotes

It’s easy. Our system prompts you for the correct information and answers your questions along the way.

It’s fast. After you provide the necessary information, a full quote is automatically and instantaneously produced. There are no processing delays, making quote turnaround time faster than ever.

It’s accurate. Because you enter your client’s complete census information directly, there’s little chance for data entry errors.

It’s convenient. No matter where you are, your PacificSource quotes are available online, 24/7.

It’s flexible. Now you have a choice. You can request a quote online, or submit a paper Proposal Request—it’s up to you.

It’s efficient. Any time paper can be eliminated in the workplace, it increases efficiency and decreases the burden on our environment.

Get Started—Register for InTouch

Registration is free and easy. (If you’re already registered, you can skip this step and just log in.)

1. Visit PacificSource.com and click Agents in the top menu. Next, click the “Register Now” link on the right side of the screen.

2. Follow the prompts to complete the online form.
   **Note:** You will need your Producer ID number.

3. Print your registration form and sign it.

4. Fax the signed form to us, attention Agent Coordinator, or email it to agentcoordinator@pacificsource.com.

We’ll process your registration and email you the login information.

Quotes for your new, small-group clients are at your fingertips—anywhere, anytime.
Creating Quotes

Log into InTouch and click **My Proposals** to generate a quote for a new client (PacificSource prospect).

Follow the on-screen instructions to complete the steps.

**Note:** Be sure to change your pop-up blocker setting on your computer to allow pop-ups.

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**InTouch for Agents home page**

**Step 1: Client Information**

Complete the information, including the “SIC Code” (Standard Industrial Classification) or “Industry Type.”

**Step 2: Group Size (screen not shown)**

Confirm that your client is a small group and agree to the terms to continue.

**Step 3: Upload / Edit Census (Enrollees)**

Enter the census information for all eligible employees and dependents, including those who are waiving. You can use either of two options:

- **Option 1:** Use the “Excel Template” to create a census document, and then follow the on-screen instructions to upload the data (copy and paste from Excel).

- **Option 2:** Type the census directly into the grid.

Add dependent rows by clicking the plus sign at the beginning of the employee row.

Click the Generate Proposal button at the bottom of the page.

**Note:** OOS (out-of-state) Zip will indicate that a member resides in a different state than their employer.

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**Step 1: Client Information**

**Step 3: Option 1**

**Step 3: Option 2**
**Step 4: Select Feature Plan(s)**
( Idaho and Montana groups with fewer than 16 enrolled employees)

This step allows you to create a plan package.

1. Click on the Coverage drop down menu to show a list of available plans.
2. Drag and drop from the Available Feature Plans list to the corresponding coverage heading on the right. (To remove a plan from the Selected list, drag it back to the Available list.) Up to three plans may be selected for each coverage category.
3. Once you’ve finished creating the package, click the Continue button under the Selected list to generate your quote.

**Final: View Proposal**

If you completed step 4 (Idaho and Montana groups with fewer than 16 enrolled employees), click the Schedule of Monthly Costs button for your age-banded proposal document.

If the quote is for another client (Oregon or 16-50 Idaho or Montana groups), you didn’t have step 4. Click the Schedule of Monthly Costs button for a proposal document containing all available plan options, or you can create a personalized quote:

1. Click on the Network drop down menu to show a list of available plans for that network.
2. Drag and drop from Available Plans list to the Selected Plans list on the right. (To remove a plan from the Selected list, drag it back to the Available list.)
3. Once you’ve finished selecting network plans, click the My Quote PDF button under the Selected Plans list to generate your quote.

**Accessing Quotes Later**

Your proposals are automatically saved and stored in My Proposals. They will be sorted by state and client.

**Create an Additional Quote for a New Client**

In My Proposals, click on the state and client, and then click “New Proposal for...”. You’ll complete the same quote steps, but your client’s information and census will be preloaded from the previous quote.

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**Need a quote for a large or renewing group, or have questions about InTouch? Contact us. We’re happy to help.**

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continued on next page
The Quote Service Option (Oregon)
For Oregon quotes, InTouch is compatible with third party quoting services, such as WiredQuote. To enable this option, click Quote Service Option on the InTouch Home page, and then click the button to allow other services to generate PacificSource quotes.

What else can you do in InTouch?

Access Client Documents
Click My Groups to access client materials such as:
- Enrollment family composition information
- Census information
- Plan materials
- Claims experience report (for groups over 100)
- Large claims download report (for groups over 100)
- Claims by month summary report (for groups over 100)
- Business summary report (for groups over 100)

Generate Reports
Click My Groups and select a client. Click the Family Composition or Detailed Census button. Next, select a date and click the Generate Report button. The report may take a moment to generate. You can view or download it now, or access it later under My Reports.

Link to Our Provider Directory
Click Provider Directory for quick access to look up a provider for a client. Be sure to select the appropriate plan or network.

Questions and Answers

Can I change my password?
Yes, you can change your password to another unique password if you wish. There are instructions for changing your password on the InTouch for Agents website.

What happens if I lose or forget my password?
When you register, you will complete hint questions to assist you should you forget your password. Your password is encrypted, so we are unable to provide that information.

Can I access information for another agent at my agency?
Because InTouch provides access to information specific and confidential to individual agents, we can only allow agents to access their own personal information.

Why doesn’t the site display correctly?
The security features we’re using require that you use the Web browser Internet Explorer to access InTouch for Agents, and the software must be version 5.5 or above. Using that program will ensure compatibility with our security precautions, and will protect your clients—and our members—from potential breaches of confidentiality.

On occasion, we need to perform maintenance on the site. In My Proposals, check the upper right area of the screen to make sure it says “Online quoting is available.”

Who should I contact if I have technical problems?
If you have any difficulties with PacificSource InTouch, you’re welcome to contact your PacificSource sales team or email intouchforagents@pacificsource.com. We’ll look into it and follow up with you right away.

If you have any questions about quoting, please contact your PacificSource sales team. For InTouch technical assistance, you’re also welcome to email intouchforagents@pacificsource.com.