

Instructions to fill in a Quick Quote Census



This guide provides essential instructions for accurately filling out the Quick Quote Census, ensuring that employee data is organized and compliant. By following these steps, users can effectively group households, determine premium amounts, and explore APTC vs. ICHRA options. The guide emphasizes the importance of correct formatting and matching class names to avoid errors, making it a valuable resource for anyone involved in employee benefits administration.

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EE ID: Unique identifier for each employee. This links employees with their dependents and keeps households grouped correctly in the quote. Max 20 characters, no special characters. All individuals with the same EE ID are grouped together as one household in the quote.

EE ID	Last Name	First Name	Member Type	Zip Code	DOB	Annual Household Income	Class Name	Current Gro
1	Smith	John	Employee	06103	04/15/1985	\$120,000.00	Full Time	
1	Smith	Anna	Spouse	06103	06/20/1986		Full Time	
1	Smith	Jake	Child	06103	09/10/2012		Full Time	
2	Paul	Amore	Employee	06510	09/02/1990	\$45,000.00	Full Time	
3	Brown	Michael	Employee	06810	01/23/1978	\$150,000.00	Full Time	
3	Brown	Noah	Child	06810	02/17/2015		Full Time	
4	Garcia	Maria	Employee	06702	07/12/1988	\$45,000.00	Full Time	
5	Wang	Li	Employee	06901	11/30/1983	\$83,000.00	Full Time	
5	Wang	Mei	Spouse	06901	04/18/1985		Full Time	
6	Kim	David	Employee	06360	05/06/1992	\$47,000.00	Full Time	
7	O'Neil	Siobhan	Employee	06032	12/19/1975	\$120,000.00	Full Time	
7	O'Neil	Fiona	Spouse	06032	07/07/1978		Full Time	
8	Singh	Arjun	Employee	06457	03/08/1986	\$72,000.00	Full Time	
8	Singh	Kavya	Child	06457	05/12/2018		Full Time	
8	Singh	Rohan	Child	06457	03/29/2021		Full Time	
9	Taylor	Emily	Employee	06051	08/25/1991	\$45,000.00	Full Time	
10	Lopez	Diego	Employee	06226	06/14/1980	\$45,000.00	Full Time	



Tip! Think of EE ID as the 'Family ID' — everyone in the same household must have the same EE ID.

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EE ID Example (How Households Are Grouped)

EE ID	Name	Member Type
1001	John Smith	Employee
1001	Jane Smith	Spouse
1001	Child Smith	Child
1002	Mike Jones	Employee

All individuals with the same EE ID are grouped together as one household in the quote.

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Name Fields: Letters only; allowed: spaces, apostrophe ('), hyphen (-)

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4 Member Type: Employee, Spouse, or Child only (enter as seen on example)

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5 Zip Code: Must be 5 digits; only CT zip codes (subject to change)

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Birth Date: MM/DD/YYYY (example: 01/31/1980)

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7 Annual Household Income (Optional but Recommended):

- Used to determine APTC (subsidy) eligibility
- If not included:
 - The quote will only show ICHRA costs
 - No subsidy comparison will be available

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Tip! When entering the income for employees please use the currency format in spreadsheet.

The screenshot shows the Microsoft Excel interface. In the Home ribbon, the Number group has the 'Currency' dropdown menu selected. An orange arrow points from this dropdown to the 'Annual Household Income' column header in a spreadsheet below. The spreadsheet has columns labeled EE ID, Last Name, First Name, Member Type, Zip Code, DOB, Annual Household Income, Class Name, Current Group Plan Premium, and Renewal Group Plan Premium.

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Enter the Class for each employee. If you have more than one class make sure to assign the correct one for employee and dependents together. The class name needs to be identical to portal class name. See tip below.

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Tip! Please make sure the class name matches the portal. You will receive error if they are not identical. **Class Name (Critical):**

- Must match the portal exactly (including spaces, capitalization, and symbols)
- Example:
 - Full Time (Correct)
 - Full-Time (Incorrect)
 - full time (Incorrect)

Class Management

Class name in the quick quote spreadsheet needs to match. Include symbols if class name includes it. ex (-) missing symbol will create error

+ Add Class

Class Name	Contribution Structure	Contribution Type	Monthly ICHRA Contribution	Action
Full Time	Fixed Dollar Amount	Employee Only	\$500	<input checked="" type="checkbox"/> <input type="checkbox"/>
Full-Time Hourly	Fixed Dollar Amount	Employee Only	\$400	<input checked="" type="checkbox"/> <input type="checkbox"/>
Part-Time Salaried	Fixed Dollar Amount	Employee Only	\$300	<input checked="" type="checkbox"/> <input type="checkbox"/>
Part-Time Hourly	Fixed Dollar Amount	Employee Only	\$100	<input checked="" type="checkbox"/> <input type="checkbox"/>

Showing 1-4 of 4 entries

First < 1 > Last

