



Small Group Quoting Tool User Guide

February 2026

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Quoting Tool User Guide

Purpose

The purpose of this user guide is to provide **step-by-step instructions** and guidance to Producers as they complete their tasks, using the Small Group and Middle Market Quoting tool.

Quoting Tool Process Overview

The Quoting tool allows the user to quickly create quotes for **Fully Insured** and **Blue Balance FundedSM** ASO quotes for small groups with an average of 50 or fewer employees in the preceding calendar year (including full-time, part-time, and seasonal).

If your group employed **more than 50 employees** in the preceding calendar year, contact your Sales Executive to learn more about your group's options.

Life, Disability, Critical Illness, Accident, and Vision products are issued by Dearborn Life Insurance Company, 701 E. 22nd St. Suite 300, Lombard, IL 60148. Blue Cross and Blue Shield of Illinois is the trade name of Dearborn Life Insurance Company, an independent licensee of the Blue Cross and Blue Shield Association. BLUE CROSS®, BLUE SHIELD® and the Cross and Shield Symbols are registered service marks of the Blue Cross and Blue Shield Association, an association of independent Blue Cross and Blue Shield Plans.

Medical, Pharmacy, and Dental products are offered by Blue Cross and Blue Shield of Illinois, a Division of Health Care Service Corporation, a Mutual Legal Reserve Company, an Independent Licensee of the Blue Cross and Blue Shield Association.

Quoting Availability

Fully Insured quotes are available for small businesses with 1–50 employees. This option includes:

- Medical, Dental and Ancillary
- Dental and Ancillary Only

Blue Balance Funded quotes are available for small businesses with 5–50 employees. This funding type is a Medical-only option but can be quoted alongside Fully Insured Dental.

What you can do with this tool:

- Add and Quote a New Prospect
- Search for Existing Prospects
- View Recently Run Quotes
- Duplicate Existing Quotes
- Create New Quotes
- Modify Life Insurance Settings
- Download Quote Documents
- View and Print Member Information
Displaying Monthly Premiums

Getting Started

To begin submitting/creating a quote, log into **Blue Access for ProducersSM (BAPSM)**.

Navigate to the eSales Tools Home Page by clicking **Group**, then **Quote a Group**.

Click **Small Group and Middle Market Quoting**.

The **Quoting Tool homepage** displays.

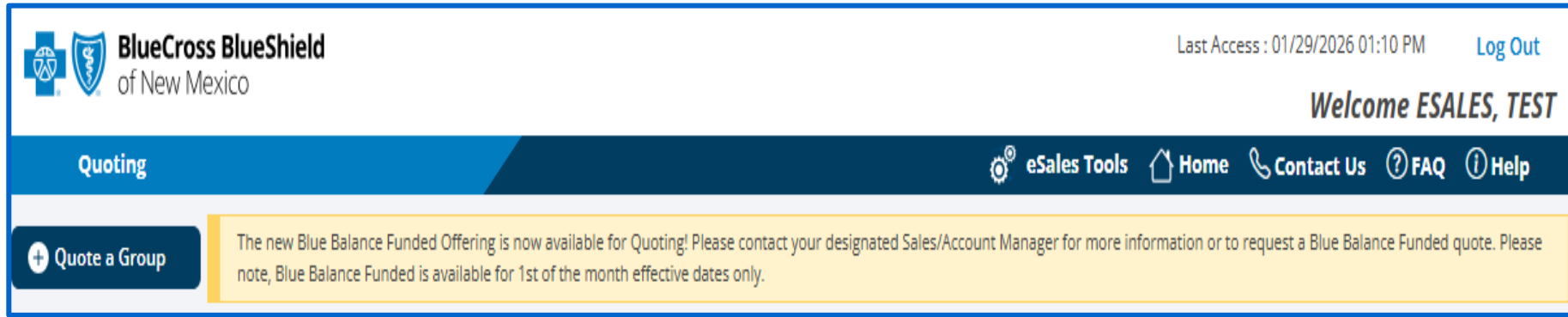


The screenshot displays the 'BlueCross BlueShield of New Mexico' Quoting tool interface. The page includes a navigation bar with 'eSales Tools', 'Home', 'Contact Us', 'FAQ', and 'Help'. A 'Quote a Group' button is visible. A yellow banner provides information about the new Blue Balance Funded Offering. Below this is a search section for existing prospects with various filters:

Prospect	Market Segment Small Group	General Agent	Clear	Find	
Division New Mexico	Effective Date MM/DD/YYYY	Producer ESALES, TEST PRODUCER	Clear	Find	
Quote #	Funding Type <input type="checkbox"/> ASO Blue Balance Funded SM <input type="checkbox"/> Fully Insured	Sub-Producer	Clear	Find	
		Prospect Phone Number			
				Search	Clear

Quoting a Group

1. Select **Quote a Group**.



BlueCross BlueShield of New Mexico

Last Access : 01/29/2026 01:10 PM [Log Out](#)

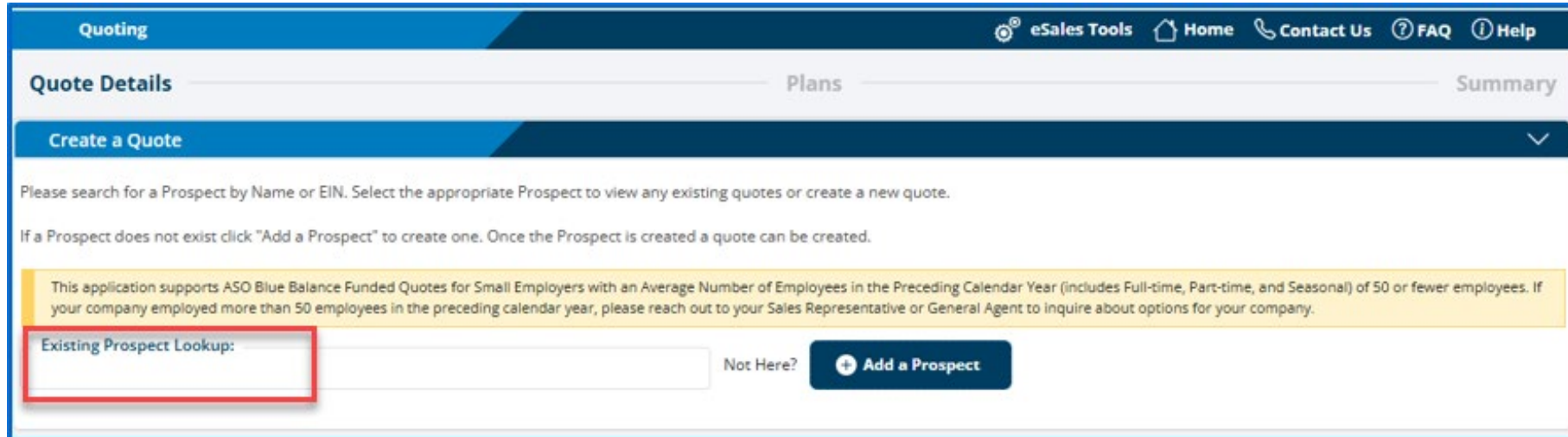
Welcome ESALES, TEST

Quoting [eSales Tools](#) [Home](#) [Contact Us](#) [FAQ](#) [Help](#)

+ Quote a Group

The new Blue Balance Funded Offering is now available for Quoting! Please contact your designated Sales/Account Manager for more information or to request a Blue Balance Funded quote. Please note, Blue Balance Funded is available for 1st of the month effective dates only.

2. Find an existing Prospect or create a new prospect.



Quoting [eSales Tools](#) [Home](#) [Contact Us](#) [FAQ](#) [Help](#)

Quote Details [Plans](#) [Summary](#)

Create a Quote

Please search for a Prospect by Name or EIN. Select the appropriate Prospect to view any existing quotes or create a new quote.

If a Prospect does not exist click "Add a Prospect" to create one. Once the Prospect is created a quote can be created.

This application supports ASO Blue Balance Funded Quotes for Small Employers with an Average Number of Employees in the Preceding Calendar Year (includes Full-time, Part-time, and Seasonal) of 50 or fewer employees. If your company employed more than 50 employees in the preceding calendar year, please reach out to your Sales Representative or General Agent to inquire about options for your company.

Existing Prospect Lookup: [Not Here?](#) **+ Add a Prospect**

Finding an Existing Prospect

1. Enter a Prospect's name in the **Existing Prospect Lookup** field.
2. Click on the Prospect when it appears in the space below.
3. **Duplicate** or **View** an existing Blue Cross and Blue Shield of New Mexico (BCBSNM) quote.

Note: Users can only view quotes associated with their BAP Login ID

- When **Duplicate** is selected all the quote details are duplicated, allowing you to make changes to the details for new quotes, as needed.
- When **View** is selected you are able to view a delivered quote or continue quoting on a prospect.

Create a Quote

Please search for a Prospect by Name or EIN. Select the appropriate Prospect to view any existing quotes or create a new quote.

If a Prospect does not exist click "Add a Prospect" to create one. Once the Prospect is created a quote can be created.

This application supports ASO Blue Balance Funded Quotes for Small Employers with an Average Number of Employees in the Preceding Calendar year your company employed more than 50 employees in the preceding calendar year, please reach out to your Sales Representative or General Agent

Existing Prospect Lookup: Not Here? [+ Add a Prospect](#)

AMATEST NM Quote

Enter at least 3 characters to look up an existing prospect.

BlueCross BlueShield of New Mexico

Last Access : 02/06/2026 08:42 AM [Log Out](#)

Welcome [User Name]

Quoting [eSales Tools](#) [Home](#) [Contact Us](#) [FAQ](#) [Help](#)

Quote Details [Plans](#) [Summary](#)

Create a Quote

Please search for a Prospect by Name or EIN. Select the appropriate Prospect to view any existing quotes or create a new quote.

If a Prospect does not exist click "Add a Prospect" to create one. Once the Prospect is created a quote can be created.

This application supports ASO Blue Balance Funded Quotes for Small Employers with an Average Number of Employees in the Preceding Calendar Year (includes Full-time, Part-time, and Seasonal) of 50 or fewer employees. If your company employed more than 50 employees in the preceding calendar year, please reach out to your Sales Representative or General Agent to inquire about options for your company.

Existing Prospect Lookup: Not Here? [+ Add a Prospect](#)

Quote Description	Quote Number	Effective Date	Funding Type	Market Segment	Quote Type	Status	Producer	Division	Product Type	Created By	Modified By	
	Quote1	1370144	05/01/2023	FI	SG	Solicitation	Delivered	PRODUCER HERE INSURANCE AGENCY	New Mexico	Health/Dental/Ancillary	900001110 03/20/2023	900001110 03/20/2023

[Duplicate](#) [View](#)

Adding a Prospect

Select **Add a Prospect** in Quote Details. Enter mandatory data in Prospect Details (fields marked with an asterisk). Producer and Division default based on the ID used to log in. Click **Create**.

The screenshot displays the BlueCross BlueShield of New Mexico Quoting interface. At the top, the user is logged in as 'ESALES, TEST' with a 'Log Out' link. The main navigation bar includes 'eSales Tools', 'Home', 'Contact Us', 'FAQ', and 'Help'. The current page is 'Quote Details', with tabs for 'Quote Details', 'Plans', and 'Summary'. A 'Create a Quote' dropdown menu is visible.

Instructions for adding a prospect are provided: 'Please search for a Prospect by Name or EIN. Select the appropriate Prospect to view any existing quotes or create a new quote. If a Prospect does not exist click "Add a Prospect" to create one. Once the Prospect is created a quote can be created.' A yellow banner notes that the application supports ASO Blue Balance Funded Quotes for Small Employers with 50 or fewer employees.

The 'Existing Prospect Lookup' section includes a search field and a button labeled 'Add a Prospect' (highlighted with a blue box). Below this is the 'Prospect Details' form with the following fields:

- Prospect Name *** (highlighted with a red box)
- Prospect EIN**
- General Agent**
- Division** (New Mexico)
- Prospect Phone #**
- Producer *** (ESALES, TEST PRODUCER, highlighted with a red box)
- Sub-Producer**
- Public Entity *** (radio buttons for Yes and No, highlighted with a red box)

Buttons for 'Clear' and 'Find' are provided for each lookup field. A 'Create' button (highlighted with a yellow box) is at the bottom right, along with 'Save' and 'Continue' buttons. A legend indicates that fields with an asterisk are required.

Creating a New Quote

Once a new prospect or quote is duplicated, **complete all the required information fields** (identified with asterisks) to create a new quote.

Total number of employees defaults to Fifty (50) or fewer employees and can not be changed.

How many employees (full-time, part-time, seasonal) did your company average on business days in the preceding calendar year? If your company did not exist in the preceding calendar year, how many employees (full-time, part-time, seasonal) does your company reasonably expect to average on business days in the current calendar year? *

Fifty (50) or fewer employees Fifty-one (51) or more employees

Quote Description Quote1	Funding Type * <input type="checkbox"/> ASO Blue Balance Funded SM <input type="checkbox"/> Fully Insured	Effective Date * ▼
Market Segment * Small Group ▼	Sales Rep. D/C /	SIC Code * <input type="text"/> <input type="button" value="Find"/>
Number of Enrolled Employees * [Greyed out]		Product Type * <input type="text"/>
Employer Zip Code * <input type="text"/>		
Employer County * --Select-- ▼		

Note: The Blue Balance Funding type is available for groups with 5–150 employees enrolling. Please contact your Sales Rep for Middle Market BBF and Fully Insured submissions, Underwriting requests, and/or additional information.

Funding Types

Users can select Fully Insured only, Fully Insured and Blue Balance Funded, or Blue Balance Funded only. Product Type options vary by Funding Type selection.

Fully Insured Product Type selection defaults to Health/ Dental/ Ancillary, but the option of Dental & Ancillary Only is available (should not be used by accounts with existing BCBSNM medical only coverage).

Note: Blue Balance Funded rates are illustrative only until submitted to BCBSNM for Underwriting evaluation

How many employees (full-time, part-time, seasonal) did your company average on business days in the preceding calendar year? If your company did not exist in the preceding calendar year, how many employees (full-time, part-time, seasonal) does your company reasonably expect to average on business days in the current calendar year? *

Fifty (50) or fewer employees Fifty-one (51) or more employees

Quote Description
Quote1

Market Segment *
Small Group

Number of Enrolled Employees *
15

Employer Zip Code *
87505

Employer County *
Santa Fe

Funding Type *
 ASO Blue Balance Funded SM Fully Insured

Sales Rep. D/C /

Effective Date *
01/01/2026

SIC Code *
0111 Wheat farms [Find](#)

Product Type *
 Health/Dental/Ancillary Dental & Ancillary Only

Funding Types

When selecting a combined Fully Insured and Blue Balance Funded quote, the Product Type defaults to Health/Dental/Ancillary for Fully Insured, and Health for Blue Balance Funded. The Product Types can not be changed.

Note: Blue Balance Funded rates are illustrative only until submitted to BCBSNM for Underwriting evaluation

How many employees (full-time, part-time, seasonal) did your company average on business days in the preceding calendar year? If your company did not exist in the preceding calendar year, how many employees (full-time, part-time, seasonal) does your company reasonably expect to average on business days in the current calendar year? *

Fifty (50) or fewer employees Fifty-one (51) or more employees

Quote Description
Quote1

Market Segment *
Small Group

Number of Enrolled Employees *
15

Employer Zip Code *
87505

Employer County *
Santa Fe

Erisa *
 Yes No

Funding Type *
 ASO Blue Balance Funded SM Fully Insured

Sales Rep. D/C
/

Dependent Values *
 Yes No

BBF Commission (PCPM) *
\$30.00

Effective Date *
01/01/2026

SIC Code *
0111 Wheat farms [Find](#)

Product Type *
 Health/Dental/Ancillary
 Health

Funding Types

When selecting a Blue Balance Funded quote, the Product Type defaults to Health, but the option of Health/ FI Dental is available.

Note: Blue Balance Funded rates are illustrative only until submitted to BCBSNM for Underwriting evaluation

How many employees (full-time, part-time, seasonal) did your company average on business days in the preceding calendar year? If your company did not exist in the preceding calendar year, how many employees (full-time, part-time, seasonal) does your company reasonably expect to average on business days in the current calendar year?*

Fifty (50) or fewer employees Fifty-one (51) or more employees

Quote Description: Quote1

Market Segment*: Small Group

Number of Enrolled Employees*: 15

Employer Zip Code*: 87505

Employer County*: Santa Fe

Erisa*: Yes No

Funding Type*: ASO Blue Balance Funded SM Fully Insured

Effective Date*: 07/01/2026

SIC Code*: 5812 Eating places [Find](#)

Product Type*: Health Health/FI Dental

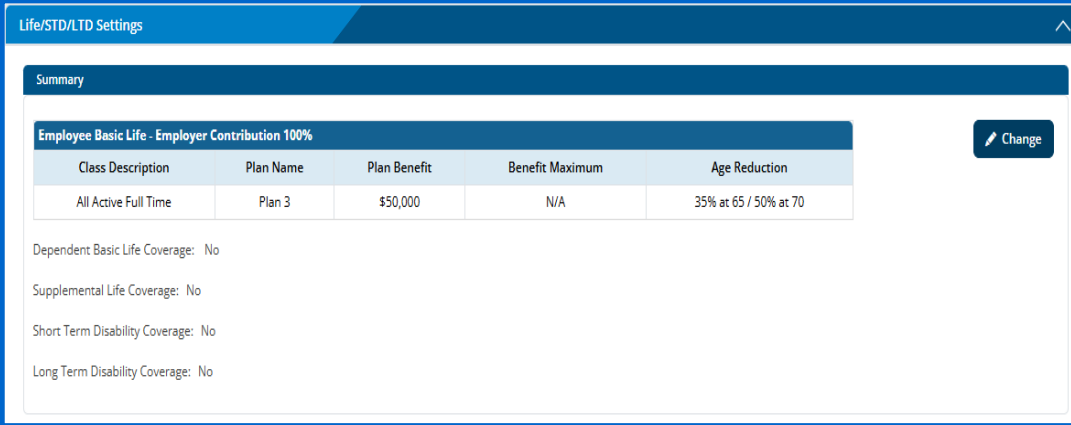
Sales Rep. D/C: /

Dependent Values*: Yes No

BBF Commission (PCPM)*: \$30.00

Quote Settings

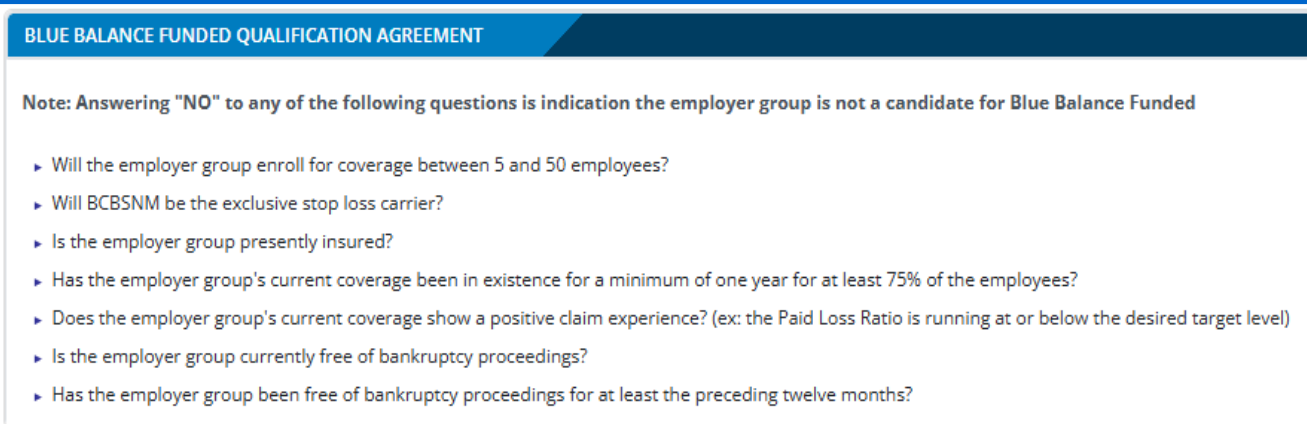
If the Fully Insured funding type has been selected, **Life**, **Short Term Disability**, and **Long Term Disability** will be available. Click **Change** to modify the default settings.



The screenshot shows the 'Life/STD/LTD Settings' interface. At the top, there is a 'Summary' section. Below it, a table titled 'Employee Basic Life - Employer Contribution 100%' is displayed. The table has five columns: 'Class Description', 'Plan Name', 'Plan Benefit', 'Benefit Maximum', and 'Age Reduction'. The data row shows 'All Active Full Time' for the class description, 'Plan 3' for the plan name, '\$50,000' for the plan benefit, 'N/A' for the benefit maximum, and '35% at 65 / 50% at 70' for the age reduction. To the right of the table is a 'Change' button. Below the table, there are four rows of text indicating coverage status: 'Dependent Basic Life Coverage: No', 'Supplemental Life Coverage: No', 'Short Term Disability Coverage: No', and 'Long Term Disability Coverage: No'.

Class Description	Plan Name	Plan Benefit	Benefit Maximum	Age Reduction
All Active Full Time	Plan 3	\$50,000	N/A	35% at 65 / 50% at 70

If Blue Balance Funded is selected, the **Blue Balance Funded Qualification Agreement** will display. Please read through the questionnaire. If the answer to any question is **No**, the employer group may not be eligible for Blue Balance Funded.



The screenshot shows the 'BLUE BALANCE FUNDED QUALIFICATION AGREEMENT' section. It begins with a note: 'Note: Answering "NO" to any of the following questions is indication the employer group is not a candidate for Blue Balance Funded'. Below the note is a list of seven questions, each preceded by a right-pointing arrow:

- ▶ Will the employer group enroll for coverage between 5 and 50 employees?
- ▶ Will BCBSNM be the exclusive stop loss carrier?
- ▶ Is the employer group presently insured?
- ▶ Has the employer group's current coverage been in existence for a minimum of one year for at least 75% of the employees?
- ▶ Does the employer group's current coverage show a positive claim experience? (ex: the Paid Loss Ratio is running at or below the desired target level)
- ▶ Is the employer group currently free of bankruptcy proceedings?
- ▶ Has the employer group been free of bankruptcy proceedings for at least the preceding twelve months?

The Blue Balance Funded Qualification Agreement section **only applies to Blue Balance Funded** and is not required for Fully Insured quotes.

Life, STD and LTD Settings

If **Fully Insured** is selected, the number of enrolled employees can have less than 5 members.

If **ASO Blue Balanced Funded** is selected, the number of enrolled employees cannot be less than 5 or greater than 50.

Life defaults to the amount and the information below but can be changed by selecting the **Change** button on the right-hand side.

Summary

Employee Basic Life - Employer Contribution 100%

Class Description	Plan Name	Plan Benefit	Benefit Maximum	Age Reduction
All Active Full Time	Plan 3	\$50,000	N/A	35% at 65 / 50% at 70

Dependent Basic Life Coverage: No

Supplemental Life Coverage: No

Short Term Disability Coverage: No

Long Term Disability Coverage: No

[Change](#)

Life Offerings

Term Life Contribution

Any number 1–100. Employer Contribution for Life cannot be above 100%.

NOTE: If you enter a contribution amount under 100 **before** selecting a Life plan, the contribution will **auto-default** back to 100% upon plan selection. To adjust, go back and **manually re-enter** the desired contribution amount **after** selecting a Life plan.

Life Classes

Class 1 Default:

All Active Full Time.

Class 2 Description:

User can type in the description for Class 2, with up to 20 characters; Class 2 plans will display for plan selection.

Life Classes

Class 1 All Active Full Time Description Class 2 Class 2 Description

Employee Basic Life

Guarantee Issue:
50k (2-9 Lives)
200k (10-50 Lives)

Class Description	Plan Name	Plan Benefit	Benefit Maximum	Age Reduction
<input type="checkbox"/> All Active Full Time	Plan 6	2 x Salary	\$200,000	35% at 65 / 50% at 70
<input type="checkbox"/> Class 2	Plan 1	\$15,000	N/A	35% at 65 / 50% at 70
<input type="checkbox"/> Class 2	Plan 2	\$25,000	N/A	35% at 65 / 50% at 70

Apply Cancel

Dependent and Supplemental Life

Dependent Basic Life defaults to No. When Yes is selected; the plan opens and defaults to Plan 1.

Dependent Basic Life Yes No

Guarantee Issue: \$10,000 spouse / \$5,000 Children

	Plan Name	Plan Benefit	Benefit Maximum
<input checked="" type="checkbox"/>	Plan 1	\$10,000 Spouse / \$5,000 Child	\$10,000 Spouse / \$5,000 Child

Supplemental Life defaults to No. When Yes is selected; the plan opens and defaults to Plan 1.

Supplemental Life Yes No

Guarantee Issue:
Fully underwritten (2 - 5 Lives)
\$30,000 (6 - 9 Lives)
\$50,000 (10 - 25 Lives)
\$100,000 (26 - 50 Lives)

	Plan Name	Plan Benefit	Benefit Maximum
<input checked="" type="checkbox"/>	Plan 1	Employee / Spouse / Child	\$500,000 Employee / \$150,000 Spouse / \$10,000 Child

Basic Short Term Disability – Class 1 Plans

Selecting Yes for Short Term Disability displays the available Basic Short Term Disability plans and defaults the contribution amount to 100%.

Contribution amount is editable, as is the Class 1 Description.

Change Life/STD/LTD Settings

Short Term Disability Yes No

Employer Contribution

Enter the Percentage of the Premium that the Employer is going to contribute towards Short Term Disability Coverage.

*STD Contribution %

Short Term Disability Classes

Class 1 Description Class 2 Description

Short Term Disability Plans

Class Description	Plan Name	Plan Benefit	Elimination Period (Days) Injury/Sickness	Maximum Benefit Duration (Weeks)
<input type="checkbox"/> All Active Full Time	Plan 4	60% salary weekly max \$750	7/7	26
<input type="checkbox"/> All Active Full Time	Plan 5	60% salary weekly max \$750	14/14	13
<input type="checkbox"/> All Active Full Time	Plan 6	60% salary weekly max \$750	14/14	26
<input type="checkbox"/> All Active Full Time	Plan 7	60% salary weekly max \$1,000	0/7	13
<input checked="" type="checkbox"/> All Active Full Time	Plan 8	60% salary weekly max \$1,000	0/7	26

Basic Short Term Disability

Basic Short Term Disability – Class 2 Plans

When Class 2 is selected, the plans from Class 1 are duplicated, and will display with the Class 2 description. Class 2 Description is editable.

Only one plan can be selected per class, and each class must have a unique selection.

Short Term Disability Yes No

Employer Contribution

Enter the Percentage of the Premium that the Employer is going to contribute towards Short Term Disability Coverage.

*STD Contribution %

Short Term Disability Classes

Class 1 All Active Full Time Description

Class 2 Class 2 Description

Short Term Disability Plans

Class Description	Plan Name	Plan Benefit	Elimination Period (Days) Injury/Sickness	Maximum Benefit Duration (Weeks)
Basic Short Term Disability				
<input type="checkbox"/> All Active Full Time	Plan 1	60% salary weekly max \$750	0/7	13
<input type="checkbox"/> All Active Full Time	Plan 2	60% salary weekly max \$750	0/7	26
<input type="checkbox"/> All Active Full Time	Plan 3	60% salary weekly	7/7	13
Basic Short Term Disability				
<input type="checkbox"/> Class 2	Plan 1	60% salary weekly max \$750	0/7	13
<input type="checkbox"/> Class 2	Plan 2	60% salary weekly max \$750	0/7	26
<input type="checkbox"/> Class 2	Plan 3	60% salary weekly max \$750	7/7	13
<input type="checkbox"/> Class 2	Plan 4	60% salary weekly max \$750	7/7	26
<input type="checkbox"/> Class 2	Plan 5	60% salary weekly max \$750	14/14	13
<input type="checkbox"/> Class 2	Plan 6	60% salary weekly max \$750	14/14	26

Voluntary Short Term Disability – Class 1 and 2 Plans

Clicking the Voluntary Short Term Disability header will display the voluntary plans.

Contribution and Classes function the same as the basic plans.

The employer can elect either Basic or Voluntary, and only one plan per Class.

The screenshot shows the 'Change Life/STD/LTD Settings' window. At the top, the '*STD Contribution' is set to 100%. Below this, the 'Short Term Disability Classes' section shows two classes: 'Class 1' (All Active Full Time) and 'Class 2' (Class 2), with 'Class 2' selected. The 'Short Term Disability Plans' section is a table with columns for Class Description, Plan Name, Plan Benefit, Elimination Period (Days) Injury/Sickness, and Maximum Benefit Duration (Weeks). The 'Voluntary Short Term Disability' header is highlighted with a green box. The table lists several plans, including 'All Active Full Time' (Plans 16*, 17*, 18*) and 'Class 2' (Plans 1, 2, 3). A red box highlights the 'Class 2' header and its corresponding rows. At the bottom, there is a note '* Only available for 10-50 lives' and 'Apply' and 'Cancel' buttons.

Class Description	Plan Name	Plan Benefit	Elimination Period (Days) Injury/Sickness	Maximum Benefit Duration (Weeks)
Basic Short Term Disability				
Voluntary Short Term Disability				
<input type="checkbox"/> All Active Full Time	Plan 16*	60% salary weekly max \$1,500	7/7	26
<input type="checkbox"/> All Active Full Time	Plan 17*	60% salary weekly max \$1,500	14/14	13
<input type="checkbox"/> All Active Full Time	Plan 18*	60% salary weekly max \$1,500	14/14	26
<input type="checkbox"/> Class 2	Plan 1	60% salary weekly max \$750	0/7	13
<input type="checkbox"/> Class 2	Plan 2	60% salary weekly max \$750	0/7	26
<input type="checkbox"/> Class 2	Plan 3	60% salary weekly	7/7	13

* Only available for 10-50 lives

Basic Long Term Disability – Class 1 and 2 Plans

Change Life/STD/LTD Settings

Employer Contribution

Enter the Percentage of the Premium that the Employer is going to contribute towards Long Term Disability Coverage.

*LTD Contribution: 100 %

Long Term Disability Classes

Class 1 All Active Full Time Description

Class 2 Class 2 Description

Long Term Disability Plans

Class Description	Plan Name	Plan Benefit	Elimination Period (Days)	Maximum Benefit Duration
Basic Long Term Disability				
<input type="checkbox"/> All Active Full Time	Plan 6	60% salary monthly max \$6,000	90	5 Years
<input checked="" type="checkbox"/> All Active Full Time	Plan 7	60% salary monthly max \$6,000	180	SSNRA
<input type="checkbox"/> All Active Full Time	Plan 8	60% salary monthly max \$6,000	180	5 Years
<input type="checkbox"/> Class 2	Plan 1	60% salary monthly max \$3,500	90	SSNRA
<input type="checkbox"/> Class 2	Plan 2	60% salary monthly max \$3,500	90	5 Years
<input type="checkbox"/> Class 2	Plan 3	60% salary monthly max \$3,500	180	SSNRA
Voluntary Long Term Disability				

Apply Cancel

Long Term Disability plans display the same way as Short Term Disability plans.

Contribution and Class descriptions are editable.

Voluntary Long Term Disability – Class 1 and 2 Plans

Change Life/STD/LTD Settings

Employer Contribution

Enter the Percentage of the Premium that the Employer is going to contribute towards Long Term Disability Coverage.

*LTD Contribution %

Long Term Disability Classes

Class 1 All Active Full Time Description

Class 2 Class 2 Description

Long Term Disability Plans

Class Description	Plan Name	Plan Benefit	Elimination Period (Days)	Maximum Benefit Duration
Basic Long Term Disability				
Voluntary Long Term Disability				
<input type="checkbox"/> All Active Full Time	Plan 1	60% salary monthly max \$6,000	90	SSNRA
<input type="checkbox"/> All Active Full Time	Plan 2	60% salary monthly max \$6,000	90	5 Years
<input type="checkbox"/> All Active Full Time	Plan 3	60% salary monthly max \$6,000	180	SSNRA
<input type="checkbox"/> All Active Full Time	Plan 4	60% salary monthly max \$6,000	180	5 Years
<input type="checkbox"/> Class 2	Plan 1	60% salary monthly max \$6,000	90	SSNRA
<input type="checkbox"/> Class 2	Plan 2	60% salary monthly max \$6,000	90	5 Years

Apply **Cancel**

Clicking the Voluntary Long Term Disability header will display the voluntary plans.

Contribution and Classes function the same as the basic plans.

The employer can elect either Basic or Voluntary, and only one plan per Class.

Ancillary – Standalone Vision Plans

Standalone Vision plans do not display on the Quote Details page, therefore do not require selection for rates to generate. The plans will display on the Rates page.

Fully Insured Plans								
Preferred Provider Organization (PPO) Network								
Blue Preferred (EPO) Network								
Health Maintenance Organization (HMO) Network								
Blue Advantage HMO Network								
Dental Plans								
Standalone Vision Plans								
Plan Name	Frequency Eye/Lens/Frame	Lens Copay	Allowance (Frame & Contacts)	Funded Fit and Follow up	Funded Standard Progressive	Funded Scratch Coating	Funded Kids Polycarb	Rates
Basic Standalone Vision								
Plan 1	12/12/24	\$25	\$100	No	No	No	No	
Plan 2	12/12/24	\$10	\$130	No	No	Yes	Yes	
Plan 3	12/12/24	\$10	\$130	Yes	No	Yes	Yes	
Plan 4	12/12/12	\$10	\$130	No	No	Yes	Yes	
Plan 5	12/12/24	\$10	\$150	No	No	Yes	Yes	
Plan 6	12/12/12	\$10	\$150	No	No	Yes	Yes	
Plan 7	12/12/12	\$10	\$150	No	Yes	Yes	Yes	
Plan 8	12/12/24	\$25	\$130	No	No	Yes	Yes	
Life Offerings								
Critical Illness Plans								

Ancillary – Critical Illness Plans

Critical Illness plans do not display on the Quote Details page, therefore do not require selection to generate rates. The plans will display on the Rates page if there are 10 or more employees.

Fully Insured Plans			
Preferred Provider Organization (PPO) Network			^
Blue Preferred (EPO) Network			^
Health Maintenance Organization (HMO) Network			^
Blue Advantage HMO Network			^
Dental Plans			^
Standalone Vision Plans			^
Life Offerings			^
Critical Illness Plans			^
Plan Name	Benefit	Benefit Maximum	Rates
Basic Critical Illness			
Plan 1	\$5,000 employee/\$5,000 spouse/\$5,000 child	Up to 3 times benefit amount	
Plan 2	\$10,000 employee/\$5,000 spouse/\$5,000 child	Up to 3 times benefit amount	
Voluntary Critical Illness			
Plan 1	\$5,000 employee/\$5,000 spouse/\$5,000 child	Up to 3 times benefit amount	
Plan 2	\$10,000 employee/\$5,000 spouse/\$5,000 child	Up to 3 times benefit amount	

Member Census

Importing Census

There are two options to enter member census information:

1. Enter the member information **manually** on the census page, or
2. Use a **census template** to import membership information to the census page.

1. Manual Entry

Select the “blue family” icon (just left of the last name field) to create additional rows for each dependent enrolling in coverage. This button can be selected multiple times to add multiple dependents.

Complete all required fields and select **Create Rate** to proceed to the Rate Summary window.

Member census will display this way if **Fully Insured** only is selected.

	Add Dep.	Last Name	First Name	Relationship Code	Gender	Date of Birth	Coverage Type	State	Zip Code
<input type="checkbox"/>	1	One	Emp	Employee	M	12/12/1965	EO	NM	87419
<input type="checkbox"/>	2	Two	Emp	Employee	M	11/11/1955	ES	NM	87410
<input type="checkbox"/>	2.1	Two	Sp	Spouse	F	10/10/1955			87410
<input type="checkbox"/>	3	Three	Emp	Employee	M	09/09/1968	EC	NM	87410
<input type="checkbox"/>	3.1	Three	Dep	Dependent	F	08/08/2008			87410
<input type="checkbox"/>	3.2	Three	Dep	Dependent	F	07/07/2011			87410
<input type="checkbox"/>	4	Four	Emp	Employee	M	06/06/1965	EF	NH	03031
<input type="checkbox"/>	4.1	Four	Sp	Spouse	F	05/05/1980			03031
<input type="checkbox"/>	4.2	Four	Dep	Dependent	M	04/04/2004			03031
<input type="checkbox"/>	4.3	Four	Dep	Dependent	F	03/03/2010			03031
<input type="checkbox"/>	5	Five	Emp	Employee	M	02/02/1955	EO	NM	87101
<input type="checkbox"/>	6	Six	Emp	Employee	F	01/01/1968	EO	NJ	07001

Member census will display this way if **ASO BBF** is selected; ZIP code will be required.

	Add Dep.	Last Name	First Name	Relationship Code	Gender	Date of Birth	Coverage Type	State	Zip Code
<input type="checkbox"/>	1	One	Emp	Employee	M	12/12/1965	EO	NM	87419
<input type="checkbox"/>	2	Two	Emp	Employee	M	11/11/1955	ES	NM	87410
<input type="checkbox"/>	2.1	Two	Sp	Spouse	F	10/10/1955			87410
<input type="checkbox"/>	3	Three	Emp	Employee	M	09/09/1968	EC	NM	87410
<input type="checkbox"/>	3.1	Three	Dep	Dependent	F	08/08/2008			87410
<input type="checkbox"/>	3.2	Three	Dep	Dependent	F	07/07/2011			87410
<input type="checkbox"/>	4	Four	Emp	Employee	M	06/06/1965	EF	NH	03031
<input type="checkbox"/>	4.1	Four	Sp	Spouse	F	05/05/1980			03031
<input type="checkbox"/>	4.2	Four	Dep	Dependent	M	04/04/2004			03031
<input type="checkbox"/>	4.3	Four	Dep	Dependent	F	03/03/2010			03031
<input type="checkbox"/>	5	Five	Emp	Employee	M	02/02/1955	EO	NM	87101
<input type="checkbox"/>	6	Six	Emp	Employee	F	01/01/1968	EO	NJ	07001

Member Census

Member census will display this way if **Life, STD and LTD Classes** are selected; ZIP code and Annual Salary will be required along with the member information.

Name	Relationship Code	Gender	Date of Birth	Coverage Type	State	Zip Code	Annual Salary	Life Classes	STD Classes	LTD Classes
	Employee	▼	MM/DD/YYYY	EO ▼	NM ▼			All Active Full Time ▼	All Active Full Time ▼	All Active Full Time ▼
	Employee	▼	MM/DD/YYYY	EO ▼	NM ▼			All Active Full Time ▼	All Active Full Time ▼	All Active Full Time ▼
	Employee	▼	MM/DD/YYYY	EO ▼	NM ▼			All Active Full Time ▼	All Active Full Time ▼	All Active Full Time ▼
	Employee	▼	MM/DD/YYYY	EO ▼	NM ▼			All Active Full Time ▼	All Active Full Time ▼	All Active Full Time ▼
	Employee	▼	MM/DD/YYYY	EO ▼	NM ▼			All Active Full Time ▼	All Active Full Time ▼	All Active Full Time ▼
	Employee	▼	MM/DD/YYYY	EO ▼	NM ▼			All Active Full Time ▼	All Active Full Time ▼	All Active Full Time ▼
	Employee	▼	MM/DD/YYYY	EO ▼	NM ▼			All Active Full Time ▼	All Active Full Time ▼	All Active Full Time ▼
	Employee	▼	MM/DD/YYYY	EO ▼	NM ▼			All Active Full Time ▼	All Active Full Time ▼	All Active Full Time ▼

2. Importing Census

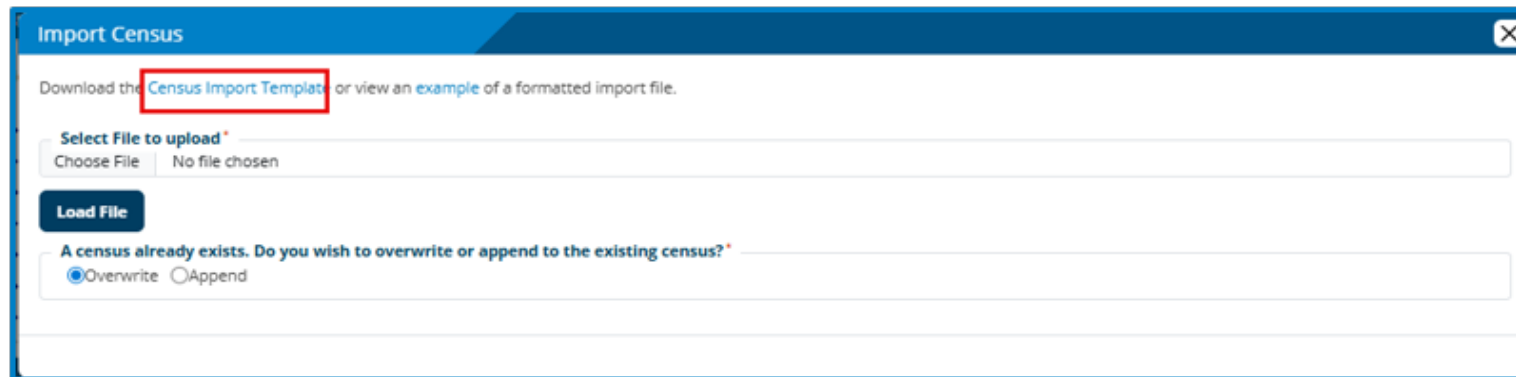
Click on the **Import Census** button.

Name	Relationship Code	Gender	Date of Birth	Coverage Type	State	Zip Code	Annual Salary	Life Classes	STD Classes	LTD Classes
	Employee	▼	MM/DD/YYYY	EO ▼	NM ▼			All Active Full Time ▼	All Active Full Time ▼	All Active Full Time ▼
	Employee	▼	MM/DD/YYYY	EO ▼	NM ▼			All Active Full Time ▼	All Active Full Time ▼	All Active Full Time ▼
	Employee	▼	MM/DD/YYYY	EO ▼	NM ▼			All Active Full Time ▼	All Active Full Time ▼	All Active Full Time ▼
	Employee	▼	MM/DD/YYYY	EO ▼	NM ▼			All Active Full Time ▼	All Active Full Time ▼	All Active Full Time ▼
	Employee	▼	MM/DD/YYYY	EO ▼	NM ▼			All Active Full Time ▼	All Active Full Time ▼	All Active Full Time ▼
	Employee	▼	MM/DD/YYYY	EO ▼	NM ▼			All Active Full Time ▼	All Active Full Time ▼	All Active Full Time ▼
	Employee	▼	MM/DD/YYYY	EO ▼	NM ▼			All Active Full Time ▼	All Active Full Time ▼	All Active Full Time ▼
	Employee	▼	MM/DD/YYYY	EO ▼	NM ▼			All Active Full Time ▼	All Active Full Time ▼	All Active Full Time ▼

Member Census

Census Import Template

- The Smart Census Import Tool can be downloaded via Blue Access for Producers along with the Reference Guide by visiting www.BCBSNM.com/producer
- Users will also be able to download the Smart Census Import Tool via the Small Group and Middle Market Quoting application



The screenshot shows a web application window titled "Import Census". The main content area contains the following elements:

- A link to download the "Census Import Template" (highlighted with a red box) or view an example of a formatted import file.
- A "Select File to upload" section with a "Choose File" button and the text "No file chosen".
- A "Load File" button.
- A question: "A census already exists. Do you wish to overwrite or append to the existing census?" with radio buttons for "Overwrite" (selected) and "Append".

Member Census

To upload a census, click on **Choose File**, double click a file to be uploaded, and click on **Load File**. Then, click on **Save & Close**.

Import Census

Download the [Census Import Template](#) or view an [example](#) of a formatted import file.

Select File to upload*
Choose File 10Census Imp Ex NM.xls

Load File

A census already exists. Do you wish to overwrite or append to the existing census?*

Overwrite Append

Save & Close

			Last Name	First Name	Relationship Code*	Gender*	Date of Birth*	Coverage Type*	State*	Zip Code*	Annual Salary
<input type="checkbox"/>	1		One	Emp	Employee	M ▾	12/12/1965	EO ▾	NM ▾	87419	50,000
<input type="checkbox"/>	2		Two	Emp	Employee	M ▾	11/11/1955	ES ▾	NM ▾	87410	50,000
<input type="checkbox"/>	2.1		Two	Sp	Spouse ▾	F ▾	10/10/1955			87410	
<input type="checkbox"/>	3		Three	Emp	Employee	M ▾	09/09/1968	EC ▾	NM ▾	87410	50,000
<input type="checkbox"/>	3.1		Three	Dep	Dependent ▾	F ▾	08/08/2008			87410	
<input type="checkbox"/>	3.2		Three	Dep	Dependent ▾	F ▾	07/07/2011			87410	
<input type="checkbox"/>	4		Four	Emp	Employee	M ▾	06/06/1965	EF ▾	NH ▾	03031	50,000
<input type="checkbox"/>	4.1		Four	Sp	Spouse ▾	F ▾	05/05/1980			03031	

Member Census

The census data is displayed on the Quote Details page. Click **Save**.

If errors are found, a message will populate with a list of the errors.

If no errors are found, click **Continue** to proceed to the plans page.

Census Count **7** Add Rows Delete Rows Import Census ?

	Relationship Code*	Gender*	Date of Birth*	Coverage Type*	State*	Zip Code*	Annual Salary*	Life Classes*	STD Classes*	LTD Classes*
	Employee	M	12/12/1965	EO	NM	87419	50,000	All Active Full Time	All Active Full Time	All Active Full Time
	Employee	M	11/11/1955	ES	NM	87410	50,000	Class 2	Class 2	Class 2
	Spouse	F	10/10/1955			87410				
	Employee	M	09/09/1968	EC	NM	87410	50,000	Class 2	Class 2	Class 2
	Dependent	F	08/08/2008			87410				
	Dependent	F	07/07/2011			87410				
	Employee	M	06/06/1965	EF	NH	03031	50,000	All Active Full Time	All Active Full Time	All Active Full Time
	Spouse	F	05/05/1980			03031				
	Dependent	M	04/04/2004			03031				
	Dependent	F	03/03/2010			03031				
	Employee	M	02/02/1955	EO	NM	87101	50,000	Class 2	Class 2	Class 2
	Employee	F	01/01/1968	EO	NJ	07001	50,000	All Active Full Time	All Active Full Time	All Active Full Time
	Employee	M	12/12/1965	EO	NM	87101	50,000	All Active Full Time	All Active Full Time	All Active Full Time

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* - Required Fields -

Save Continue

Benefit Design Options

Benefit design options can be viewed by clicking on the **plan type**.

Then, scroll within the plan type to view each benefit design. Get rate details by clicking the **magnifying glass icons** under the Member and Composite Rate columns.

Click **Generate Proposal** to generate proposal documents.

The screenshot shows the 'Plans' interface with a 'Generate Proposal' button highlighted in red. Below the navigation bar, the 'Fully Insured Plans' section is expanded to show the 'Preferred Provider Organization (PPO) Network'. A table lists various PPO plans with columns for Plan ID, Deductible, Out-of-Pocket Max, Coinsurance, Primary Care/Virtual Visit, Specialist Office Visit, ER Copay/Coinsurance, Urgent Care Visit, In-Patient Deductible, Out-Patient Deductible, Non-Preferred Pharmacy, Cens Rates, and Rate Table. Magnifying glass icons are present in the Rate Table column for each row.

Plan ID	Individual Deductible In-Network// Out-of-Network	Individual Out-of-Pocket Max In-Network// Out-of-Network	Coinsurance In-Network// Out-of-Network	Primary Care/Virtual Visit	Specialist Office Visit	ER Copay// Coinsurance Per ER Visit	Urgent Care Visit	In-Patient Deductible In-Network// Out-of-Network	Out-Patient Deductible In-Network// Out-of-Network	Non-Preferred Pharmacy	Cens Rates	Rate Table
PPO Plans												
Platinum												
P7AAPPO**5	\$0// \$0	\$5000// \$10000	100%// 80%	\$10/\$0	\$40	\$350// 100%	\$75	\$700// DC	\$350// DC	\$10/\$20/\$70/\$120/\$150/\$250		
P811PPO**1	\$350// \$700	\$3700// \$7400	90%// 70%	\$10/\$0	\$40	\$550// 100%	\$75	DC// DC	DC// DC	\$10/\$20/\$70/\$120/\$150/\$250		
P810PPO**1	\$600// \$1200	\$1700// \$3400	80%// 60%	\$25/\$0	\$55	\$450// 100%	\$75	DC// DC	DC// DC	\$10/\$20/\$70/\$120/\$150/\$250		
P730PPO**1	\$850// \$1700	\$2700// \$8100	80%// 60%	\$25/\$0	\$55	\$400// 100%	\$75	DC// DC	DC// DC	\$10/\$20/\$70/\$120/\$150/\$250		
P7ABPPO**1	\$1500// \$3000	\$1500// \$3000	100%// 80%	\$20/\$0	\$50	\$500// 100%	\$75	DC// DC	DC// DC	\$10/\$20/\$70/\$120/\$150/\$250		

The screenshot shows the 'Blue Balance Funded Plans' section expanded to show 'Blue Preferred EPO'. A table lists various EPO benefit design options with columns for Plan ID, Deductible, Out-of-Pocket Max, Coinsurance, Primary Care/Virtual Visit, Specialist Office Visit, ER Copay/Coinsurance, Urgent Care Visit, In-Patient Deductible, Out-Patient Deductible, Non-Preferred Pharmacy, and Total Monthly Health Charges. Magnifying glass icons are present in the Total Monthly Health Charges column for each row.

Plan ID	Individual Deductible In-Network// Out-of-Network	Individual Out-of-Pocket Max In-Network// Out-of-Network	Coinsurance In-Network// Out-of-Network	Primary Care/Virtual Visit	Specialist Office Visit	ER Copay// Coinsurance Per ER Visit	Urgent Care Visit	In-Patient Deductible In-Network// Out-of-Network	Out-Patient Deductible In-Network// Out-of-Network	Non-Preferred Pharmacy	Total Monthly Health Charges
EPO Benefit Design Options											
ANBPES01	\$500// Not Covered	\$3000// Not Covered	80%// Not Covered	\$25/\$0	\$45	\$200// 100%	\$75	DC// Not Covered	DC// Not Covered	\$10/\$20/\$55/\$95/\$150/\$250	
ANBPES02	\$1000// Not Covered	\$4000// Not Covered	80%// Not Covered	\$30/\$0	\$50	\$200// 100%	\$75	DC// Not Covered	DC// Not Covered	\$10/\$20/\$55/\$95/\$150/\$250	
ANBPES06	\$1500// Not Covered	\$3500// Not Covered	70%// Not Covered	\$40/\$0	\$55	\$200// 100%	\$75	DC// Not Covered	DC// Not Covered	\$10/\$20/\$55/\$95/\$150/\$250	
ANBPES06	\$1500// Not Covered	\$3500// Not Covered	70%// Not Covered	\$40/\$0	\$55	\$200// 100%	\$75	DC// Not Covered	DC// Not Covered	\$10/\$20/\$55/\$95/\$150/\$250	
ANBPES06	\$1500// Not Covered	\$3500// Not Covered	70%// Not Covered	\$40/\$0	\$55	\$200// 100%	\$75	DC// Not Covered	DC// Not Covered	\$10/\$20/\$55/\$95/\$150/\$250	
ANBPES06	\$1500// Not Covered	\$3500// Not Covered	70%// Not Covered	\$40/\$0	\$55	\$200// 100%	\$75	DC// Not Covered	DC// Not Covered	\$10/\$20/\$55/\$95/\$150/\$250	

Note: “Rate” refers to monthly premiums for fully insured ACA/Small Group Plans. Final composite rates are dependent on enrollment demographics. If you ran an initial Blue Balance Funded quote, “Rate” refers to the administrative fees, stop loss premiums and projected claims, which can vary with enrollment. Contact your Sales Executive for an underwritten quote.







Proposal Documents

Proposal documents generate and are available to download and print. The reports produced vary based on Funding Type and Product Type selections. Please Note that BBF Proposal documents are solicitation rates only and should not be distributed to the client as they are not considered final rates.

Summary

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Quick Quote Documents




BBF Health Proposal with PHI 
BBF Health Proposal without PHI 
Proposal Cover Letter 
Conditions and Caveats 
Administrative Services Agreement 
Stop Loss Coverage Policy 

BBF Health Only

Summary

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Quick Quote Documents









Proposal With PHI 
Proposal Without PHI 
Proposal Cover Letter 

Fully Insured - either Product Type

Summary

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Quick Quote Documents







BBF Health Proposal with PHI 
BBF Health Proposal without PHI 
FI Dental Proposal with PHI 
FI Dental Proposal without PHI 
Proposal Cover Letter 
Conditions and Caveats 
Administrative Services Agreement 
Stop Loss Coverage Policy 

BBF Health and Fully Insured Dental

Summary

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Quick Quote Documents

Proposal With PHI 
Proposal Without PHI 
Proposal Cover Letter 
Conditions and Caveats 
Administrative Services Agreement 
Stop Loss Coverage Policy 

Combined Fully Insured and Blue Balance Funded

Searching and Tracking Quotes

To search for a quote, go to the Quoting Homepage, enter any available criteria and click the [Search](#) button. Results will display on the page.

Search Existing Prospects

Prospect: Job Aid
Division: New Mexico
Quote #:
Market Segment: Small Group
Effective Date: MM/DD/YYYY
Funding Type: ASO Blue Balance Funded SM Fully Insured
General Agent:
Producer: BROKER/PRODUCER NAME HERE
Sub-Producer:
Prospect Phone Number:
Search Clear

	Prospect	Division	Market Segment	Effective Date	Funding Type	Status	Quote Type	Sales Rep.	Producer	Sub-Producer	Prospect Phone	Quote Number
View	Job Aid Acct	New Mexico	SG	07/01/2026	BBF	Delivered	Solicitation	/	BROKER/PRODUCER NAME			1514576
View	Job Aid Acct	New Mexico	SG	07/01/2026	BBF	Delivered	Solicitation	/	BROKER/PRODUCER NAME			1514575
View	Job Aid Acct	New Mexico	SG	07/01/2026	FI	Delivered	Solicitation	/	BROKER/PRODUCER NAME			1514574
View	Job Aid Acct	New Mexico	SG	02/01/2026	FI,BBF	Delivered	Solicitation		BROKER/PRODUCER NAME			1514573

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Click the [View](#) button to be brought to the Quote Details page.

Searching and Tracking Quotes

Users can view the status of an Underwritten quote by clicking on the History button on the top right of the Quote Details page for any of their groups.

Producer: 010020011 ESALES, TEST PRODUCER
Market Segment: SG

[RFP Entry](#) [Email](#) [Attachments](#) [Log](#) [History](#)

Activity Date	Activity	In Progress/Completed	Activity Age
01/30/2026	Data Entry	In Progress	0 day(s)

Activity	Status	Definition
Data Entry	Data Entry In Progress	Data Entry In Progress status is defined as one of the following. 1. A Producer, General Agent, Sales or Operations has initiated an Underwritten Quote but the Quote has not been submitted to Underwriting yet.
	Info Received - Data Entry	2. BCBS has received paperwork and is reviewing for completeness but the Quote has not been submitted to Underwriting yet.
Data Entry Review	Data Entry Review In Progress	Documentation of an Underwritten Quote has been submitted to BCBS for review but the Quote has not been submitted to Underwriting yet.
	Info Received - Data Entry Review	
More Info Required	More Info Needed - Data Entry	BCBS has requested additional information and the submitter is in the process of obtaining requested information.

Status can be seen on the Activity History popup with data of how long the quote was in each activity. A definition of each activity is provided on the bottom.



Getting an Underwritten Quote

If the group wants to move forward with the Blue Balance Funded Quote and receive Underwritten rates, please reach out to your **Sales Executive**.

Helpful Resources



For questions about quoting, enrollment and benefits, please talk with your **Sales Executive**.



For technical issues with the eSales Quoting tool, please contact our ITG Service Center at **1-888-706-0583**.



For questions regarding any of the information within this user manual or the enrollment process, please email us at: **SGMM_TechSupport@hcsc.com**.