

Storyboard: MarketWrite Quoting Calculator

Shooting Location(s):	
Director(s):	
Actor(s):	Actor Name - Joachim (Description of personality) Actor Name - Betty (Description of personality)
Voiceover (VO) Actor(s):	Actor Name - Joachim (Description of personality) Actor Name - Betty (Description of personality)
Editor(s):	
Total Length:	
Overview:	This call is used to show how to initiate a call.
Background:	This man has called in 5 times for the same reason and is irritated.

Scr	Multimedia/Description	Script
1	<p>(Splash Screen) MarketWrite Quoting Calculator</p> <p>Fade-in text: Fade in text for each bullet point as the narrator mentions each.</p>	<p>(Narrator): Welcome to the MarketWrite Quoting Calculator training module!</p> <p>In this module you will learn:</p> <ul style="list-style-type: none"> • How to access the new MarketWrite Quoting Calculator • How to search rates by contract information and; • How to search rates by product information
2	<p>Buttons: “ABCBS”, “Exchange” “Exchange” button jumps to slide 3. “ABCBS” button jumps to slide 9.</p>	<p>(Narrator): Please select your product line.</p>
3	<p>(Still Image) Image:</p>	<p>(Narrator): Starting after November 1st, 2020, you will begin quoting rates from the MarketWrite calculator for On and Off-Exchange plans. Rates will not be available for products prior to January 1st, 2020 using this tool.</p> <p>For 2020 change requests due to qualifying SEPs, you will continue to use the rate calculation spreadsheet found on IOKB.</p> <p>Members or potential members curious about possible APTC calculations should speak to their agent of record or to our internal agent marketing division.</p>

Scr	Multimedia/Description	Script
4	<p>(Video)</p> <p>Video of user accessing the tool from the IOKB website using Chrome.</p> <p>Click on the links as the narrator mentions each.</p>	<p>(Narrator): The MarketWrite Quoting Calculator works best when viewed in Google Chrome. Using Internet Explorer, go to the IOKB website and click the More button at the top right of the screen.</p> <p>From the drop-down menu, select Tools and click the link that reads MarketWrite Quoting Calculator. Next, open Google Chrome and copy and paste the MarketWrite URL in the address bar and press Enter.</p>
5	<p>(Still Image)</p> <p>Pop-in image: (will need image of the two features)</p>	<p>(Narrator): There are two different features for calculating rates. You can either use an existing contract number or enter the product information.</p>
6	<p>(Video)</p> <p>Video of user entering contract information using the Application ID/Contract Number field.</p>	<ul style="list-style-type: none"> • Searching by contract information <p>The Application Id/Contract Number field allows you to enter an existing active application ID or contract number. This feature pulls the applicant information automatically so manual entry is not required.</p> <p>Once the application ID or contract number is entered, select the desired benefit details. The applicant information will then be displayed.</p> <p>Click the Calculate button and select Detail Rates.</p>

Scr	Multimedia/Description	Script
7	<p>(Video)</p> <p>Video of user entering product information using the Application ID/ Contract Number field.</p>	<ul style="list-style-type: none"> • Searching by product information <p>If there is no existing contract number to enter, product and benefit information can be used. The screens and options displayed will vary based on the product selected.</p> <p>To use this feature, select the product from the Product Name drop-down list. Enter the desired effective date by typing it into the field or selecting the calendar icon. Then, select the desired benefits and add the applicant details.</p> <p>The “applicant” field will provide 3 options:</p> <ul style="list-style-type: none"> • Applicant • Spouse • Child <p>An applicant MUST be entered before a spouse or child, otherwise an error message will be displayed.</p> <p>After entering the applicant’s information, select Add. The applicants’ information will display at the bottom of the Applicant Details section.</p> <p>Click the Calculate button to generate rates. For more detailed information, select</p>
8	<p>(Splash Screen)</p> <p>Conclusion</p>	<p>(Narrator): Thank you for viewing this module. If you have any questions, please see your supervisor or team lead.</p>

Scr	Multimedia/Description	Script
9	<p>Display the effective date chart starting on page 4 of the user guide.</p>	<p>(Narrator): The MarketWrite calculator contains the current rates for products offered by ABCBS. When viewing rates for products prior to 2020, refer to the chart below. If the effective date is prior to the date displayed in the chart, you will need to use the Quick Quote Tool to view the rate. This chart is also available in the MarketWrite Quoting Calculator user guide linked under the Resources menu.</p>
10	<p>(Video)</p> <p>Video of user accessing the tool from the IOKB website using Chrome.</p> <p>Click on the links as the narrator mentions each.</p>	<p>(Narrator): The MarketWrite Quoting Calculator works best when viewed in Google Chrome. Using Internet Explorer, go to the IOKB website and click the More button at the top right of the screen.</p> <p>From the drop-down menu, select Tools and click the link that reads MarketWrite Quoting Calculator. Next, open Google Chrome and copy and paste the MarketWrite URL in the address bar and press Enter.</p>
11	<p>(Still Image)</p> <p>Pop-in image: (will need image of the two features)</p>	<p>(Narrator): There are two different features for calculating rates. You can either use an existing contract number or enter the product information.</p>

Scr	Multimedia/Description	Script
12	<p>(Video)</p> <p>Video of user entering contract information using the Application ID/Contract Number field.</p>	<ul style="list-style-type: none"> • Searching by contract information <p>The Application Id/Contract Number field allows you to enter an existing active application ID or contract number. This feature pulls the applicant information automatically so manual entry is not required.</p> <p>Once the application ID or contract number is entered, select the desired benefit details. The applicant information will then be displayed.</p> <p>Click the Calculate button and select Detail Rates.</p>

Scr	Multimedia/Description	Script
13	<p>(Video)</p> <p>Video of user entering product information using the Application ID/ Contract Number field.</p>	<ul style="list-style-type: none"> • Searching by product information <p>If there is no existing contract number to enter, product and benefit information can be used. The screens and options displayed will vary based on the product selected.</p> <p>To use this feature, select the product from the Product Name drop-down list. Enter the desired effective date by typing it into the field or selecting the calendar icon. Then, select the desired benefits and add the applicant details.</p> <p>The “applicant” field will provide 3 options:</p> <ul style="list-style-type: none"> • Applicant • Spouse • Child <p>An applicant MUST be entered before a spouse or child, otherwise an error message will be displayed.</p> <p>After entering the applicant’s information, select Add. The applicants’ information will display at the bottom of the Applicant Details section.</p> <p>Click the Calculate button to generate rates. For more detailed information, select the Detail Rates button.</p>

Scr	Multimedia/Description	Script
14	<ul style="list-style-type: none"> • Screenshot #1 showing the MarketWrite calculator home screen with a red box appearing over the product name and effective date search fields. • Screenshot #2 showing surcharge field on the applicant details field (maybe we could use the screenshots from Lynn Dauzat’s email). 	<p>Please be aware:</p> <ul style="list-style-type: none"> • For grandfathered and grandmothered products, the calculator cannot currently calculate the surcharge when searching by a member’s contract information. To properly calculate the rates for a grandfathered or grandmothered product, use the “product information” search field. • In addition, when searching for grandfathered and grandmothered products, the surcharge can only be added at the applicant level rather than the individual level, but it will calculate across the entire contract correctly.
15	(Splash Screen) Conclusion	(Narrator): Thank you for viewing this module. If you have any questions, please see your supervisor or team lead.