

PDSA.com

Solutions for the Real World

Warner Pacific Insurance Services
Online Enrollment

Warner Pacific Insurance Services



Warner Pacific provides health insurance agents with sales assistance, innovative technology and back-office support — the tools you need to grow your business in a rapidly changing marketplace. With strong leadership and a focus on building and deepening our relationships, we have become a top-producing General Agency for many of the nation's largest health insurance carriers.

A vital resource for our agent partners, Warner Pacific's highly skilled family of employees has been serving agents for more than 30 years.

The Warner Way

- Dedicated sales team with you every step of the way
- Innovative technology tools created to grow your business
- A product portfolio offering a one-stop solution
- Concierge service that is friendly and personal
- Healthcare Reform expertise

Some of our favorite stats

- 200+ seasoned professional employees
- Over \$1.8 billion in annualized premium
- 100,000+ in-force groups
- Total in-force small group membership in excess of 320,000
- Serving more than 8,000 brokers in California and Colorado

Online Enrollment Project (PRO Enroll)

PRO Enroll is a public website that allows groups to conduct their annual open enrollment online. Using a link provided by their enrollment coordinator, employees can self-register on the site. Once registered, they enter their personal information and make their insurance selections from the plans offered to their group. Each plan offering has detailed benefit and pricing information to assist the employee in making their selection. Once the employee has made their selections, they proceed to the application step to complete their enrollment.

PDSA was called in to develop this rather complex system. Our job was to develop this new site, while integrating with Warner Pacific's existing processes and applications.

Registration/Login

We developed several screens to manage the employee self-registration process, as well as Login, Forgot ID, and Forgot PW screens for registered users.

Census Collection

Once signed in, the employee must enter their personal information, as well as the personal information for their spouse and dependents. Information collected includes: Name, Relationship, Date of Birth, and address. This information is required to provide accurate pricing information. PDSA developed screen to collect and store this information.

Plan Selection

Once the census is complete, the employee is presented with the plans being offered in each category (Medical, Dental, Vision, Life). Each plan offering includes a personal price quote, as well as a description of benefits such as covered services, deductibles, and co-pays. PDSA developed screens to display the information gathered from Warner Pacific's existing data layer, and store the employee selections.

Enrollment

Depending on the carrier, the employee either downloads a paper application, or is routed to the online application system. PDSA developed screens to display the employee selections and cost, and pass the employee to the appropriate application process.

Business Value

The new system allows Warner Pacific brokers to:

- Manage real-time enrollments through a secure internal database
- Allow your clients or their employees to enter personal information and benefits selections online
- Transfer data electronically to specified carriers

This provides greatly enhanced visibility for the broker and the enrollment administrator as well as reducing paperwork and errors.

Technology

Visual Studio

.NET Framework

MVC 5

SQL Server

JQuery

Bootstrap

Contact Information

For more information on this proposal, please contact either Paul D. Sheriff or Michael Krasowski at PDSA.

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