



HOW TO QUOTE USING CSG



CSG Actuarial tool

- ◎ Medicare Supplement, “Run Quote”
 - ▶ Enter zip code and other details for quote
 - Preferred-Select Underwriting class is automatically incorporated into quoting
 - 5% Wearable/Activity tracker discount is automatically reflected in results
 - Household Discount will provide the 7% Roommate Discount and the Dual-Applicant of 10%
 - There will be multiple listings with various discounts. Make sure to select the correct option

Q Run a Quote
ANDERSON, IN

Client / Applicant

Zip Code

County

Age

Gender

Tobacco

Sort By

Plan

Effective Date

Household Discount

[Show Advanced](#)



CSG Actuarial tool

Medicare Supplement, “Run Quote”

- ▶ Apply Discounts – This will apply the Roommate discount (7%) and the Dual-applicant discount(s) (10%)
 - Click on the “Expand” arrow on the side for a listing of all the applied discounts
- ▶ Annual Rate – This will apply the 10% discount for paying the entire premium annually

Expand Quotes

- Apply Discounts
- Annual Rate
- Market Analytics
- My Companies
- Select Plans
- Underwriting Filters

Client/Label:	Zip	ANDERSON, IN	Age	Gender
<input type="text"/>	<input type="text" value="46012"/>	<input type="text" value="Madison"/>	<input type="text" value="70"/>	<input type="text" value="Female"/>
Tobacco	Plan	Effective Date	Sort By	
<input type="text" value="Non-tobacco"/>	<input type="text" value="G"/>	<input type="text" value="2022-04-01"/>	<input type="text" value="Price"/>	

\$1,063.99 <i>/yr*</i>	National Health Ins Co (Allstate)	🌐	☑	✕	➤
\$1,120.02 <i>/yr*</i>	National Health Ins Co (Allstate)	🌐	☑	✕	➤
\$1,177.60 <i>/yr*</i>	National Health Ins Co (Allstate)	🌐	☑	✕	➤
\$1,239.54 <i>/yr*</i>	National Health Ins Co (Allstate)	🌐	☑	✕	➤
\$1,257.32 <i>/yr*</i>	Accendo Insurance Company (A CVS Company And Aetna Affiliate)	🌐	☑	✕	➤

CSG Actuarial tool

- Expand results for overview of calculated discounts:
 - Rating class will show calculated discounts

\$1,446.48 /yr	National Health Ins Co (Allstate)	   
\$1,494.72 /yr	National Health Ins Co (Allstate)	   
\$1,522.68 /yr	National Health Ins Co (Allstate)	   
\$1,573.44 /yr	National Health Ins Co (Allstate)	   

\$1,446.48 /yr	National Health Ins Co (Allstate)	   
Parent: Allstate Ins Grp AM Best Rating: A+ (Outlook Stable) Rate Type: Attained age		Plan: F S&P Rating: N/A Rating Class: Preferred Select/Wearable/Household/Dual
		Years in Market: 57 Effective Date: 04/01/2022
Quote Options 1		

\$1,573.44 /yr	National Health Ins Co (Allstate)	   
Parent: Allstate Ins Grp AM Best Rating: A+ (Outlook Stable) Rate Type: Attained age		Plan: F S&P Rating: N/A Rating Class: Preferred Select/Household
		Years in Market: 57 Effective Date: 04/01/2022
Quote Options 4		



Application Process

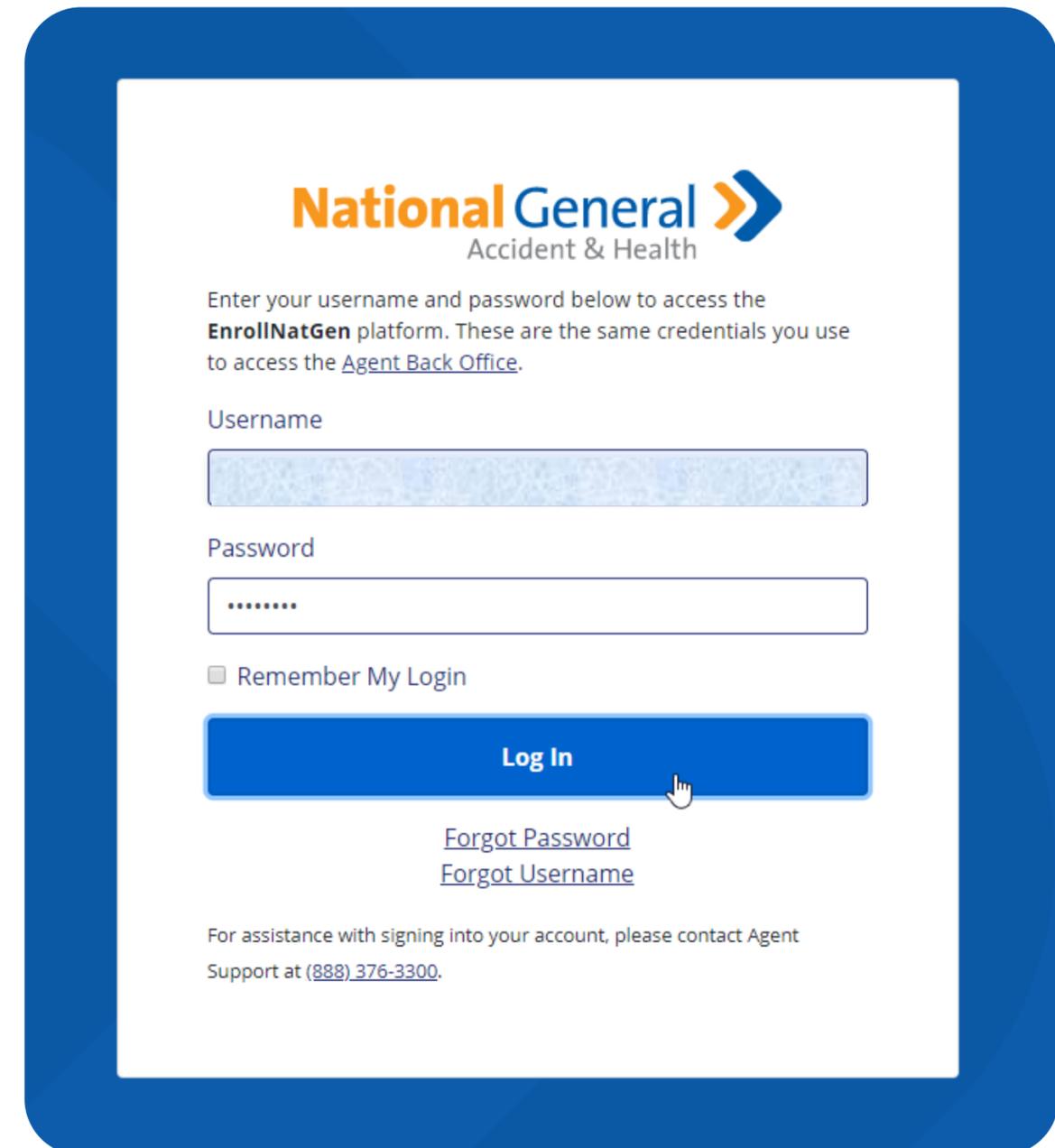
Go to: www.EnrollNatGen.com

● Enter **Username and Password**

- ▶ Same as those for NatGen Agent Back Office (ABO) portal

● If logging in for first time:

- ▶ Click on **Forgot Username** to receive email with login instructions
- ▶ Call Agent Support at (888) 376-3300 for additional assistance

A screenshot of the National General login page, enclosed in a blue rounded rectangle. The page features the National General logo at the top, followed by the text "Accident & Health". Below this is a message: "Enter your username and password below to access the EnrollNatGen platform. These are the same credentials you use to access the Agent Back Office." There are two input fields: "Username" and "Password". Below the password field is a checkbox labeled "Remember My Login". A large blue "Log In" button is centered, with a mouse cursor hovering over it. Below the button are two links: "Forgot Password" and "Forgot Username". At the bottom, there is a note: "For assistance with signing into your account, please contact Agent Support at (888) 376-3300."



Application Process

- Enter the necessary info to generate the quote:
 - Effective date (any-day of the month)
 - Zip code
 - DOB
 - Gender
 - Click → “Quote Now”

The screenshot shows a web form titled "Quick quote for all senior products" on a red background. The form includes a navigation bar with "Quote", "Applications", "Contact Us", "Underwriting guide", and "Downloads". Below the title, it says "Start a new quote for Medicare Supplement; Dental, Vision, & Hearing; Senior Indemnity; or LIFE association." The form fields are: "Effective date" with a checkmark and a date input field containing "05/01/2022"; "Zip code" with a checkmark, a zip code input field containing "46012", and a dropdown menu showing "Indiana"; "Date of birth" with a checkmark, a date input field containing "04/10/1954", and a secondary field showing "68 years old"; and "Gender" with a checkmark, radio buttons for "female" (selected) and "male". A dark blue "quote now" button is at the bottom.



Application Process

- ⦿ Select Enrollment Type
 - ▶ Underwritten
 - ▶ Open Enrollment
 - ▶ Guaranteed Issue
- ⦿ Answer MACRA question
- ⦿ Enter Height/Weight, Tobacco
- ⦿ Answer Preferred-Select Qualification question

📄 brochure
amplifon hearing summary
📄 underwriting guide

Enrollment Type guidelines ?

Underwritten
 Open Enrollment
 Guaranteed Issue

Did you first become eligible for Medicare due to age, disability or end-stage renal disease prior to January 1, 2020?

Yes
 No

Height **Weight**

When last have you used tobacco in any form, or used nicotine products including a patch, gum, or electronic cigarettes?

Never
 Yes
 No

Within the last 5 years has medication been prescribed or recommended for your client for the following:

- Depression

Yes
 No

✔ Eligible for preferred select rates

Medicare Supplement Plan A	Preferred select rates \$107.88 /mo.	calculate discount
Medicare Supplement Plan F	Preferred select rates \$142.34 /mo.	calculate discount



Application Process

- Identify plan of interest and “Calculate Discounts” to determine monthly premium

Medicare Supplement Plan A	Preferred select rates \$107.88 /mo.	calculate discount
Medicare Supplement Plan F	Preferred select rates \$142.34 /mo.	calculate discount
Medicare Supplement Plan F High Deductible	Preferred select rates \$42.15 /mo.	calculate discount
Medicare Supplement Plan G	Preferred select rates \$111.51 /mo.	calculate discount
Medicare Supplement Plan N	Preferred select rates \$83.92 /mo.	calculate discount

Medicare Supplement Rate finder

close

Do you have a spouse who has or is applying for National General Accident & Health Medicare Supplement insurance?

Yes
 No

Do you own an activity tracker or wearable device, such as an Apple Watch[®] or FitBit[®], and are you willing to share your fitness data with National General Health Insurance?

Yes
 No

Please select a billing frequency. Discounts are available for annual payment.

Annual

get quotes

- Eligible for household discount 10%
- Eligible for activity tracker discount 5%
- Eligible for annual pay discount 10%



Application Process

- Review eligible discounts
- Add desired plan to cart
- Click “Apply” to begin online enrollment process

✓ Eligible for preferred select rates

✓ Eligible for household discount	10%	<div style="background-color: #1a2b4d; color: white; padding: 10px 20px; border-radius: 5px;">edit answers</div>
✓ Eligible for activity tracker discount	5%	
✓ Eligible for annual pay discount	10%	

Medicare Supplement Plan A	\$1,029.36 /an.	<div style="background-color: #e85c3d; color: white; padding: 5px 10px; border-radius: 5px;">add</div>
Medicare Supplement Plan F	\$1,358.16 /an.	<div style="background-color: #e85c3d; color: white; padding: 5px 10px; border-radius: 5px;">add</div>
Medicare Supplement Plan F High Deductible	\$402.12 /an.	<div style="background-color: #e85c3d; color: white; padding: 5px 10px; border-radius: 5px;">add</div>
Medicare Supplement Plan G	\$1,064.04 /an.	<div style="background-color: #e85c3d; color: white; padding: 5px 10px; border-radius: 5px;">add</div>

Your cart

Medicare Supplement Insurance

remove

Plan G	\$1,064.04 /an.
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Primary: Applicant 1

Annual premium	\$1,064.04
One time application fee	\$ 25.00

apply



QUESTIONS?

Contact:

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