


2018 Health Plan Survey Qualtrics Data Entry Guide

January 2019

Getting Started

Login to the Health Plan Survey and select the “Add/Edit Data” tab from the “Book of Business” view.



Search

Home > Health Plan Survey 3.0 > Book of Business > Add / Edit Data ☆ 1

← Undo → Redo ↶ Revert 🔄 Refresh ⏸ Pause

General Plan Info | Plan Cost | Plan Design | Employee Contributions | Rx & Section 125 | **Add / Edit Data**

Add / Edit 2018 Survey Data

Add & Edit 2018 Survey Data for All Book of Business


Add New 2018 Survey

Click the organization name below to edit the 2018 data

Organization & Survey Last Updated Date	
1	12/20/2018 ▲
1 Stone Solutions LLC	12/20/2018
1&1	12/20/2018
1st Express	12/20/2018
1st Rental and Sales	12/20/2018
1st Scribe, Inc. dba First Scribe, Inc.	12/20/2018
3	12/20/2018
3 Sigma, LLC	12/20/2018
3A Collision	12/20/2018
3HC	12/20/2018
4-R Equipment, LLC.	12/20/2018
4Front Energy Solutions	12/20/2018
4Leaf Consulting LLC	12/20/2018
4Leaf Inc.	12/20/2018

Getting Started

Click the button on the left to add a new 2018 program or click on a client name on the right to edit an existing program in Qualtrics.



Search

Home > Health Plan Survey 3.0 > Book of Business > Add / Edit Data ☆ 1

Undo Redo Revert Refresh Pause

General Plan Info Plan Cost Plan Design Employee Contributions Rx & Section 125 Add / Edit Data

Add / Edit 2018 Survey Data

Add & Edit 2018 Survey Data for All Book of Business

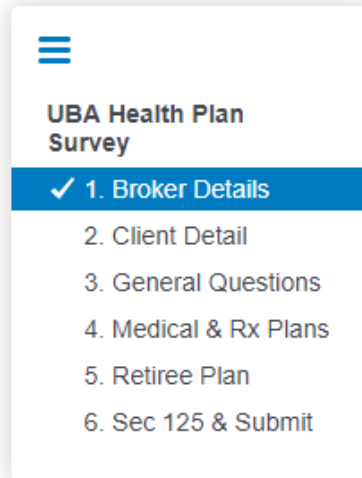
Add New 2018 Survey

Click the organization name below to edit the 2018 data

Organization & Survey Last Updated Date	
1	12/20/2018
1 Stone Solutions LLC	12/20/2018
1&1	12/20/2018
1st Express	12/20/2018
1st Rental and Sales	12/20/2018
1st Scribe, Inc. dba First Scribe, Inc.	12/20/2018
3	12/20/2018
3 Sigma, LLC	12/20/2018
3A Collision	12/20/2018
3HC	12/20/2018
4-R Equipment, LLC.	12/20/2018
4Front Energy Solutions	12/20/2018
4Leaf Consulting LLC	12/20/2018
4Leaf Inc.	12/20/2018

Qualtrics Data Entry Portal

The Qualtrics Data Entry Portal will open in a new window. The following slides will contain useful tips for portal usage.



Welcome to the UBA HealthPlan Survey!

IMPORTANT INSTRUCTIONS:

- Complete the entire survey for each Employer client
- Use the "NEXT" button to submit your answers on a page
- Use the "BACK" button at the bottom of each page to go backward
- **YOU MUST CLICK "SUBMIT NOW" AT THE END**

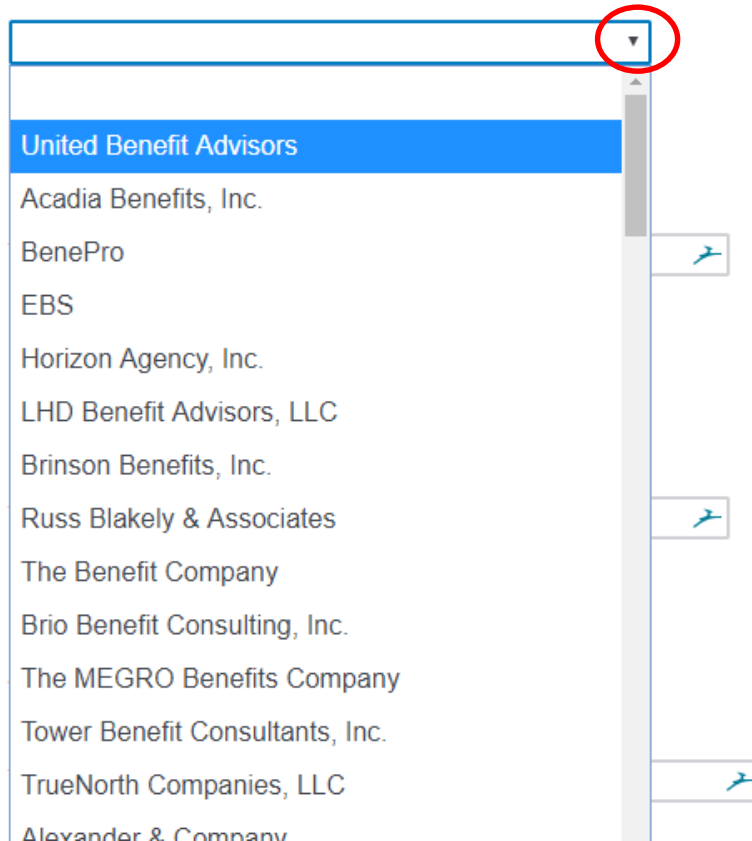
Email questions to support@ubabenefits.com

1. UBA Partner - Required for putting this survey into your Book of Business Report

Qualtrics Data Entry Portal – Partner Name

When selecting your Partner name, please expand the pulldown list and repeatedly type the first letter of your Partner name until located.

1. UBA Partner - Required for putting this survey into your Book of Business Report



United Benefit Advisors

Acadia Benefits, Inc.

BenePro

EBS

Horizon Agency, Inc.

LHD Benefit Advisors, LLC

Brinson Benefits, Inc.

Russ Blakely & Associates

The Benefit Company

Brio Benefit Consulting, Inc.

The MEGRO Benefits Company

Tower Benefit Consultants, Inc.

TrueNorth Companies, LLC

Alexander & Company

Qualtrics Data Entry Portal – Survey Progress

Survey progress is saved locally in your browser's cookies whenever you advance using the next button. You will continue where you left off when you follow the survey link again for any unsubmitted surveys.

4. Email Address of Person Completing Survey:

Your Email Address:

5. Phone Number of Person Completing Survey (Your Phone Number):

Phone: (XXX-XXX-XXXX)

Extension: (optional)

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Qualtrics Data Entry Portal – Multiple Plans

At the end of the “Medical & Rx Plans” section it is determined if another medical plan is to be entered for this client’s program.

15. Mail Order Plan Design:

Additional Medical Plan:

If **NO MORE** medical plans to add / edit for this group then [CLICK HERE](#)

OR

To **ADD / EDIT** another medical plan for this group, click the "Next →" button below.

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Qualtrics Data Entry Portal – Survey Submission

Once a survey is submitted you will not be able to go back in the browser and make further edits. You will be emailed a link to make further edits. You will also be given an option to download a PDF of your submitted survey form.

After submitting this survey you will no longer be able to go back and make any changes using this browser window.

Following survey submission you will receive an email, sent to the address entered in the “Broker Details” section of the survey, confirming your submission was received.

This email will contain a link to access the submitted survey form and make any necessary changes.

Submit Now

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THANK YOU

Please email support@ubabenefits.com if you need additional support or have any feedback concerning the Qualtrics data entry portal.