Applied Benefits Designer™
is a Benefits plan modeling application.

Applied Benefits Designer is a modern solution that allows you to model and compare various Benefits plan options in real time so you can help your clients make the right decisions – all in one meeting.

With Applied Benefits Designer, you can quickly run quotes, generate proposals and present innovative Benefits plans in a concise, visual format that's easily understood by clients.

The application lets you swiftly finalize medical, Rx and ancillary plan selections – showing your value as a broker by helping clients more quickly make an informed decision.

It directly integrates with your Applied Epic® management system to keep you from wasting time and money on multiple systems while providing a single view of your book of business.

Eliminate time–consuming spreadsheets and static presentations and step into digital plan modeling to increase efficiency, accuracy, and level of client support.

Allows your agency to

- Foster big–picture, strategic benefits conversations to help clients maximize their budget with complete coverage

- Keep renewals high and new business opportunities active

- Remove friction from the customer experience and improve staff productivity

"Previously, it would take about 4-5 hours to process small group health insurance renewals. With Applied Benefits Designer, we've been able to cut that time down to about 1-2 hours. This time savings has helped us be able to focus our time and energy on other tasks."

– Heather Bolhuis, Benefits Account Manager, Ottawa Kent

Core Capabilities

Management System Integration
Direct integration with Applied Epic means actions taken within Applied Benefits Designer are clearly tracked in your management system so front-office and back-office activities are always synced.

Plan Comparisons
Creates interactive presentations that instantly highlight the difference between plans. Move from high-level overviews to detailed plan comparisons with a few clicks to see the immediate impact of each plan design change.

Real-Time Cost Updates
Provides unique cost-saving measures on the spot during meetings with automatic adjustments to plans based on a defined contribution or budgeted amount for both large and small groups.

Funding Options Modeling
Models the impact of different funding vehicles including HSA contributions, deductible and co-insurance HRA, and utilization projections. The ability to manipulate each plan live clearly illustrates the impact of each change on the employer and its employees.

Instant Proposal Generation
Generates professional, customized branded proposals in minutes. Stores medical, Rx and ancillary plans in your database for reuse later without redundant data entry.

Community Rating
Removes the complexity from Community Rating premium structures. Streamlines the process to save you time and make it easier for your clients to understand.

Applied Benefits Designer eliminates on average 1-2 weekly meetings per client and 4-6 hours of time spent on tedious spreadsheets.

Source: Applied Systems

Self-Funding
Simplifies self-funding conversations by making it easy for you to explain this alternative funding strategy with side-by-side comparisons and show employers how changing variables affect their plans in real time.

Archive Benefits Plans
Archives Benefits plans that are no longer being marketed in the agency database so they will not appear in searches for active Benefits plans.

Request for Proposal (RFP) Builder
Saves you time and clicks by allowing you to set up, send, and track a request for premiums from various lines of business all within one workflow. Consolidate the status of all RFPs with the RFP Summary report.

Have Questions?

Call 800.999.5368
Visit appliedsystems.com

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