



DropQuote + Employee Navigator

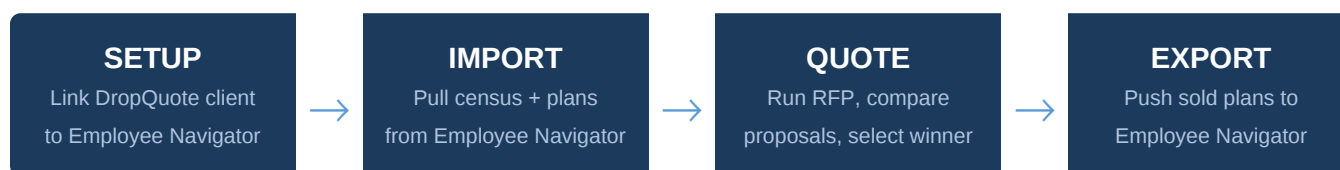
Integration Guide

A step-by-step workflow for brokers — from setup and data import through post-sale plan export.

Overview

The DropQuote + Employee Navigator integration creates a seamless two-way connection between your quoting workflow and benefits administration. By linking the two platforms, brokers can eliminate duplicate data entry, pull live census and plan data directly into RFPs, and push sold plans into Employee Navigator with a single click.

This guide walks through the complete 18-step workflow across 6 parts — from initial client setup through final plan import in Employee Navigator.



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Part 1 — Setting Up the Integration in DropQuote

When creating a new client in DropQuote, you will be prompted to select a benefits administration system and initiate the integration.

1 Create the Client & Select Employee Navigator as the BenAdmin

- Click **New Client** in DropQuote. Fill in Client Information, Group Details, and Broker & Commission Details.
- When asked "Does this client/prospect utilize a benefits administration system or online enrollment platform?", select **Yes** and choose **Employee Navigator** from the dropdown.

Tip: Even if the group does not currently use Employee Navigator but plans to adopt it after the marketing effort, select Yes and choose Employee Navigator. This ensures the integration is available when you need it.

Select "Yes" for benefits admin system and choose Employee Navigator from the dropdown

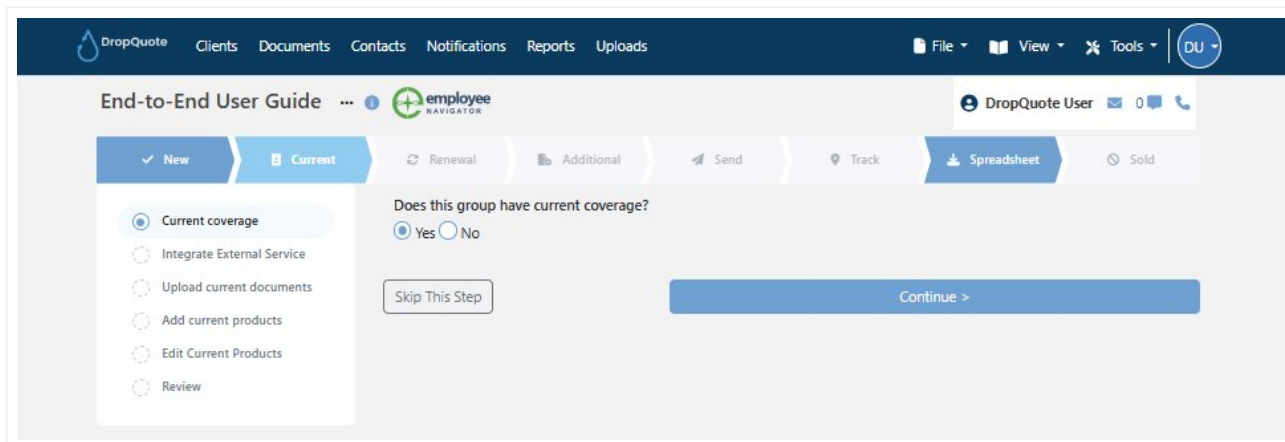
2 Complete the Client Setup

- Continue through the remaining setup screens — Group Details, Broker & Commission Details.
- Click **Continue** through to the Review step, then click **Continue**.

3 Confirm Current Coverage & Advance to the Current Step

- After the client is created, DropQuote automatically moves to the **Current** step.
- You will be asked: "Does this group have current coverage?"
- Select **Yes** if the group has existing coverage — you will then be prompted to integrate with Employee Navigator on the next screen.

- Select **No** if this is a virgin group — you will manually build the RFP plan designs and can connect Employee Navigator at a later stage.

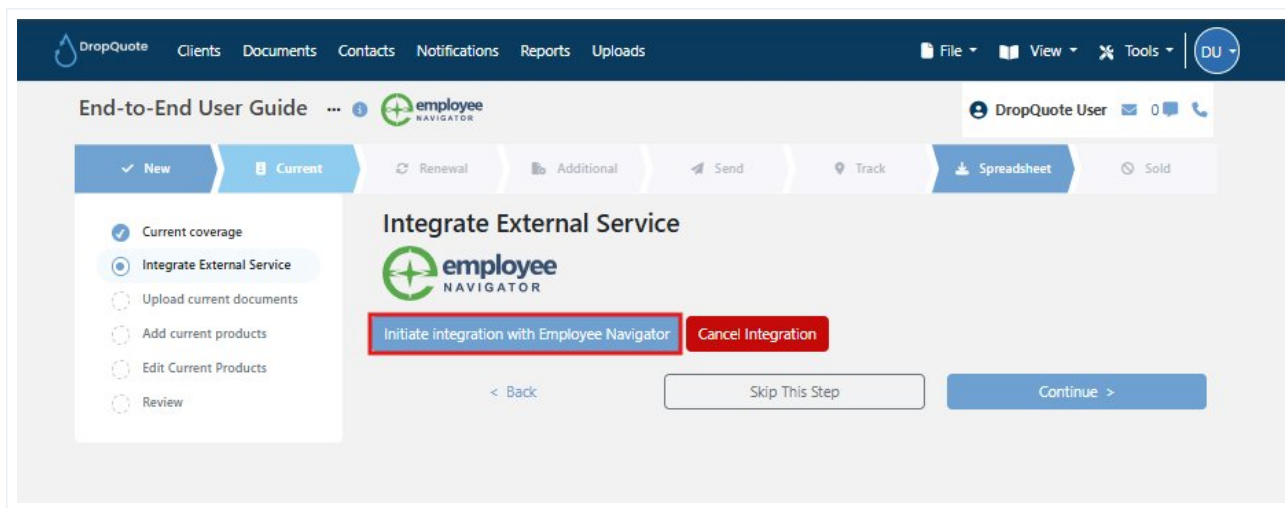


Current step — select Yes if the group has current coverage

4

Initiate the Integration with Employee Navigator

- If you selected Yes for current coverage, DropQuote advances to the **Integrate External Service** screen.
- Click **Initiate integration with Employee Navigator**.
- You will be directed to Employee Navigator where you will see a pending integration request.



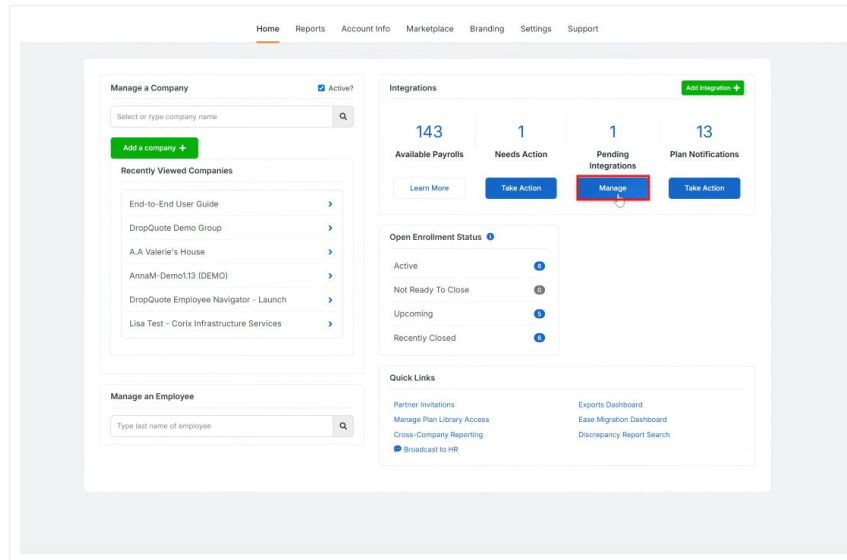
Integrate External Service screen — click "Initiate integration with Employee Navigator"

Part 2 — Completing the Link in Employee Navigator

Switch to your Employee Navigator portal to accept the pending integration and link (or create) the company record.

5 Log In to Employee Navigator

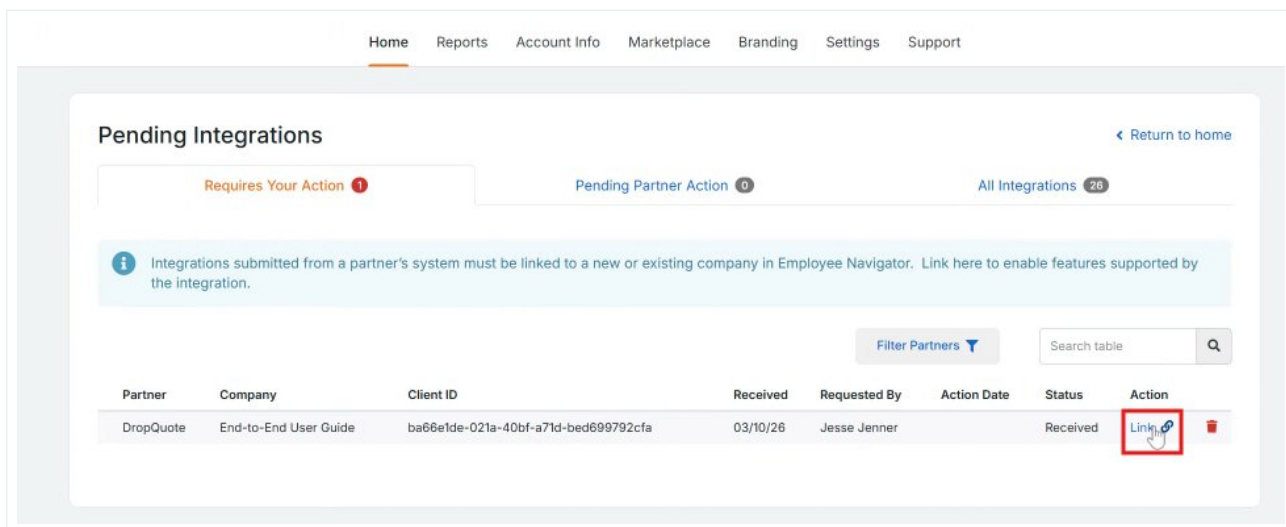
- On the home screen, click **Manage** under Pending Integrations.



Employee Navigator home — click Manage under Pending Integrations

6 Locate the DropQuote Request & Click Link

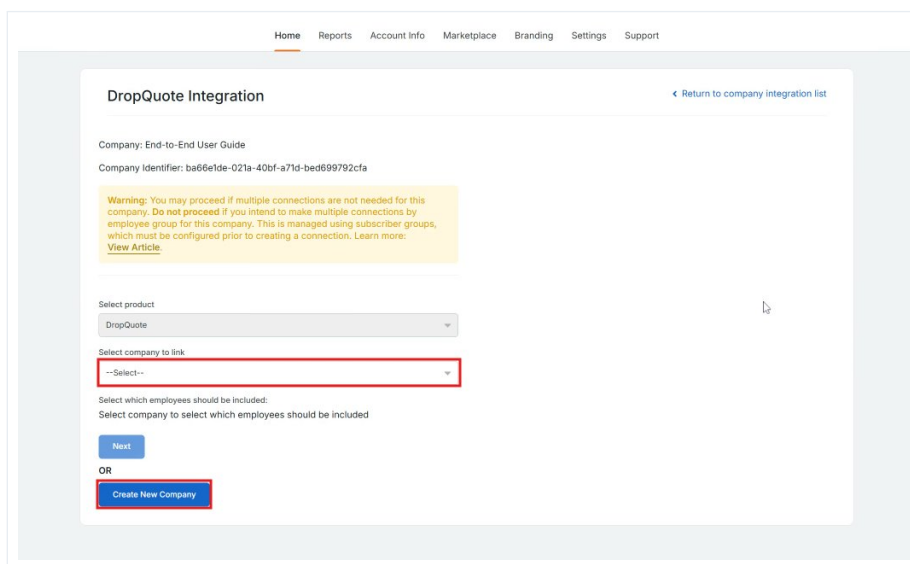
- On the Pending Integrations screen, click the **Requires Your Action** tab.
- Find the **DropQuote** entry and click the **Link** button in the Action column.



Pending Integrations list — find the DropQuote entry and click Link

7 Link to an Existing Company or Create a New One

- The DropQuote Integration screen gives you two options:
- Option A — Link to existing company:** Select the company from the *Select company to link* dropdown and click **Next**.
- Option B — Create a new company:** Click **Create New Company** if the group is not yet built in Employee Navigator. You can still push sold plans over later once the build is complete.



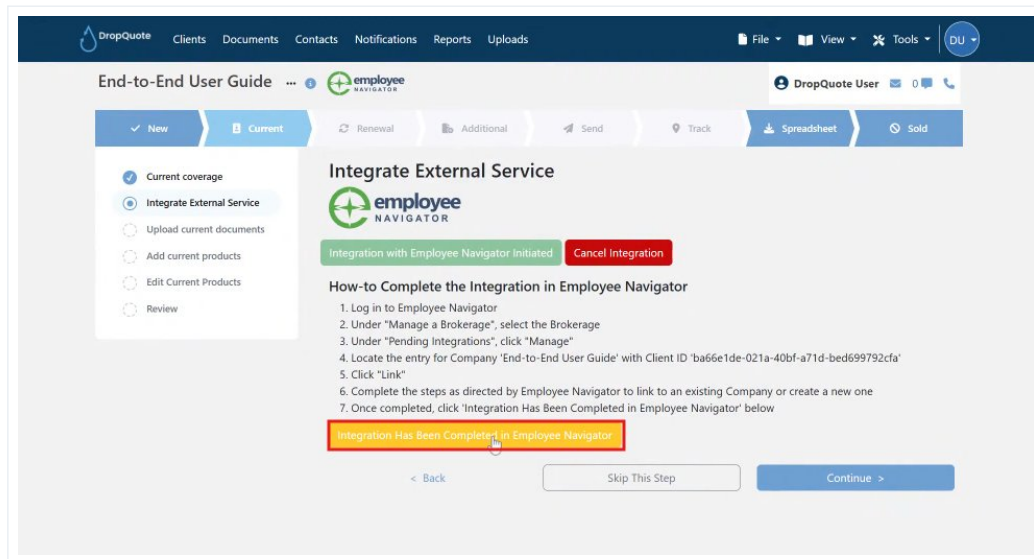
DropQuote Integration screen — select existing company or Create New Company

8 Return to DropQuote & Confirm the Integration

- Once you have finished linking in Employee Navigator, switch back to DropQuote.

- On the Integrate External Service screen, click the yellow **"Integration Has Been Completed in Employee Navigator"** button.
- DropQuote will advance to the import screen.

***Tip:** If you navigated away before confirming, return to the Current step of the RFP and go back to Integrate External Service to find the confirmation button.*



Click the yellow confirmation button to complete the link

Part 3 — Importing Data from Employee Navigator

Once the integration is confirmed, DropQuote shows the status as "Linked with Employee Navigator" and gives you options to pull in live census and plan data.

9 Select Your Import Options & Import Data

- Choose what to pull from Employee Navigator:
- **Import Plans:** Select *Import all plans* to pull in current plan designs and benefit details. However, plan builds in Employee Navigator often do not capture all of the fields carriers need to see on an RFP. If plans are incomplete, you can still upload a sold proposal or benefit summaries and let DropQuote's AI build the plan specs — in that case, select *Do not import plans* to avoid duplicate or conflicting data.
- **Import Census:** Select *Import Census replacing any previous import* to pull in a real-time employee census with current enrollments.
- Click **Import Requested Data from Employee Navigator** when ready.

Import screen — select plan and census import options

Important: If you plan to upload documents and have DropQuote's AI create the plans, select *Do not import plans*. Importing plans AND uploading documents for the same group can create duplicate or conflicting plan data.

10 Monitor Import Progress & Complete

- After clicking Import, a progress modal appears showing real-time results.
- DropQuote will report how many plans and census records were successfully imported, and flag any import issues.

- Click **Import Completed** when done.
- Then review plan designs at the **Edit Current Products** step OR the **Spreadsheet** tab of the progress tracker to fill in any missing information.

Tip: If you imported plans and uploaded documents, there will be multiple plans/columns. Be sure to delete the duplicate column.

Importing from Employee Navigator...

4 of 5 plans successfully imported
15 of 15 census records successfully imported
1 import issues

Cancel Import Import Completed

Linked with Employee Navigator Cancel Integration

Import Plans from Employee Navigator

- ☒ Import all plans
- ☐ Import all plans and replace plans previously imported
- ☐ Import only new plans not previously imported
- ☐ Do not import plans

Import Census from Employee Navigator

- ☒ Import Census replacing any previous import
- ☐ Do not import census

Import Requested Data from Employee Navigator

< Back Skip This Step

Import progress modal — plans and census records imported

Part 4 — Sending the RFP with Live Census Data

Because the group is linked to Employee Navigator, the census is pulled in real time when you send the RFP — no manual file upload needed.

11 Review the Census at the Send Step

- When you reach the **Send** step, DropQuote automatically attaches the live Employee Navigator census to your carrier emails.
- At the **Review** sub-step, you will see it listed under Attachments as **Census Data**. Click it to preview the exact file carriers will receive before submitting.
- This ensures carriers always have your most current employee roster — no manual spreadsheet uploads needed.

CARRIER EMAILS	Carrier Rep - carriers@qls.com
Guardian Life Insurance	Carrier Rep - carriers@qls.com
Lincoln Financial Group	Carrier Rep - carriers@lfg.com
MetLife	Carrier Rep - carriers@metlife.com
Mutual of Omaha	Carrier Rep - carriers@mutualofomaha.com
Unum Insurance	Carrier Rep - carriers@unum.com

ATTACHMENTS	Proposal Request Form
Census Data	

Send step — Census Data auto-attached from Employee Navigator

12 Upload Carrier Proposals & Review the Spreadsheet

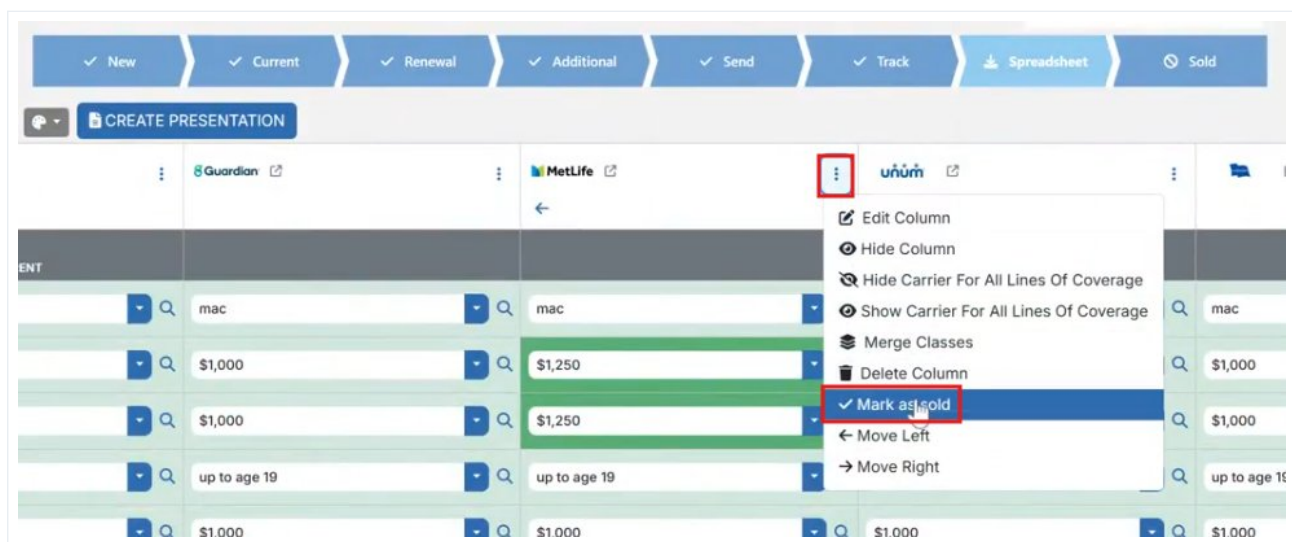
- After sending the RFP, upload carrier proposals via the **Track** tab.
- DropQuote's AI will extract plan data and populate the **Spreadsheet** view automatically.
- Review proposals, set enrollment globals, and finalize your comparison.

Part 5 — Marking Plans as Sold & Exporting

Once you have selected the winning carrier(s) and are ready to mark the case, follow these steps to push the sold plans directly into Employee Navigator.

13 Mark the Sold Carrier in the Spreadsheet

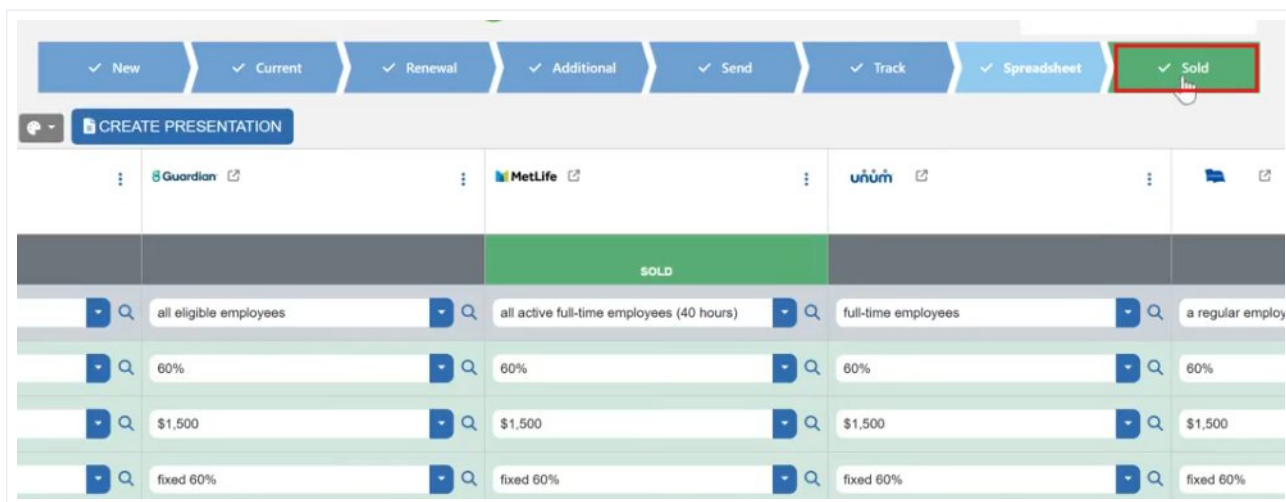
- In the **Spreadsheet** view, click the **3-dot menu** at the top of the winning carrier's column.
- Select **Mark as Sold**. Repeat this for every line of coverage that sold — each sold column will display a green "SOLD" banner.



Spreadsheet view — click the 3-dot menu and select Mark as Sold

14 Click the Green Sold Step in the Progress Bar

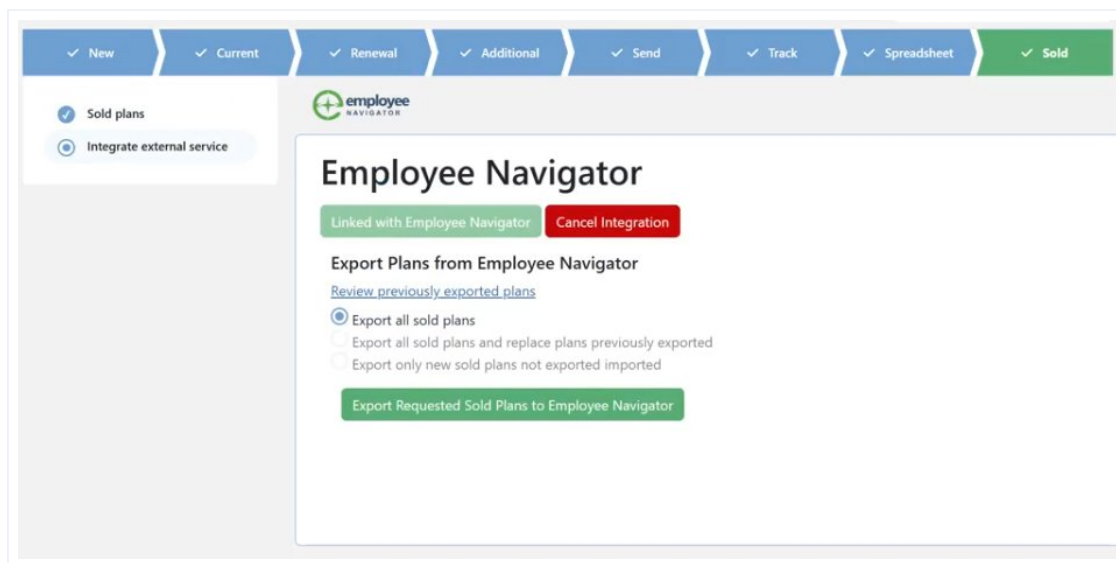
- After marking all sold products, the **Sold** step in the progress bar (the "pizza tracker") at the top will turn green.
- Click it to advance to the Sold step and trigger the Employee Navigator export.



The Sold step lights up green in the progress bar — click it to proceed

15 Export Sold Plans to Employee Navigator

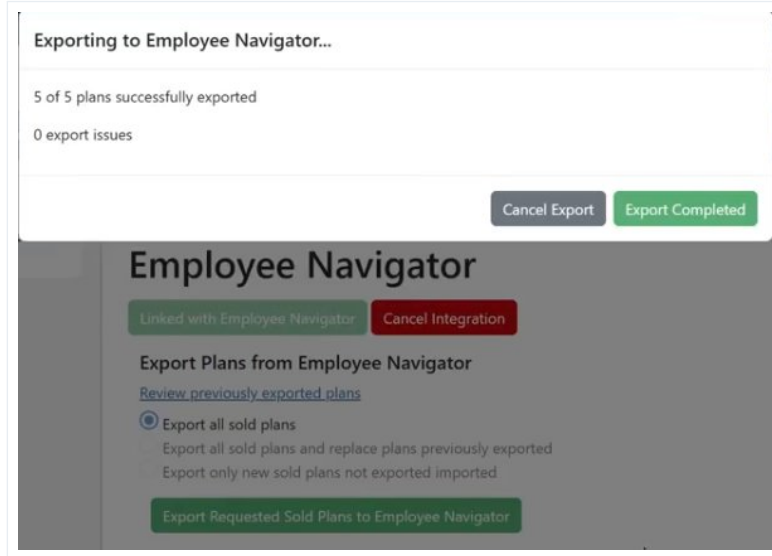
- On the Sold step, DropQuote displays the **Employee Navigator export screen** showing the integration status as "Linked with Employee Navigator."
- Select **Export all sold plans**, then click **Export Requested Sold Plans to Employee Navigator**.



Employee Navigator export screen — select export option and click Export

16 Confirm the Export is Complete

- A progress modal will display real-time export results — number of plans successfully exported and any issues.
- When all plans show as exported, click **Export Completed**.



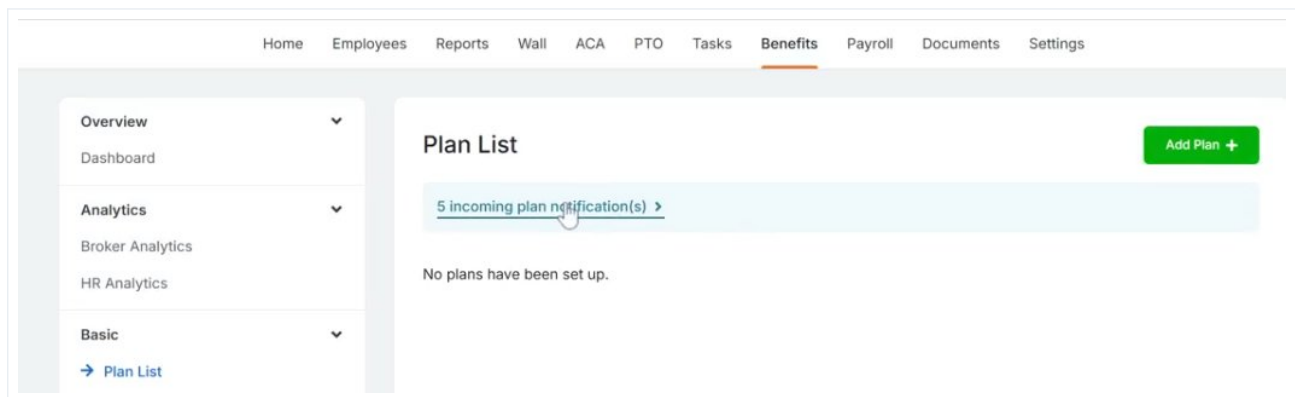
Export progress modal — click Export Completed when done

Part 6 — Finalizing Plans in Employee Navigator

Return to Employee Navigator to review and add the exported plans to the group's benefit build.

17 Open the Group in Employee Navigator & Check Incoming Plan Notifications

- In Employee Navigator, navigate to the group's **Benefits** → **Plan List**.
- You will see a banner at the top showing **incoming plan notification(s)** from DropQuote.
- Click the notification to review the imported plans.



Employee Navigator Plan List — incoming plan notifications from DropQuote

18 Review Plans & Click Add to Finalize

- Employee Navigator displays each sold plan pushed from DropQuote.
- Review the plan details — carrier, coverage type, rates, plan design, etc.
- Click **Add** for each plan to add it to the group's benefit build.
- You will need to enter plan and eligibility rules before turning plans on for open enrollment.
- Once all plans are added, the group is fully set up in Employee Navigator with the sold benefit designs ready for enrollment.

Select partner plans to add or renew

Partner plan		Action on s																		
2026 MetLife Dental Dental	MetLife	03/01/26 - FUTURE Add																		
Plan Summary																				
Partner plan Policy Info Plan Date: 03/01/2026 - Benefit Summary Services - In Network - Out of Network - Preferred Network <table border="1"> <thead> <tr> <th>Service</th> <th>Amount</th> </tr> </thead> <tbody> <tr> <td>Annual Maximum Benefit</td> <td>\$1,250</td> </tr> <tr> <td>Deductible Individual</td> <td>\$50</td> </tr> <tr> <td>Deductible Family</td> <td>\$150</td> </tr> </tbody> </table> Rates Composite Rates <table border="1"> <thead> <tr> <th>Rate Type</th> <th>Amount</th> </tr> </thead> <tbody> <tr> <td>Employee</td> <td>\$24.62</td> </tr> <tr> <td>Employee Plus Spouse</td> <td>\$50.23</td> </tr> <tr> <td>Employee Plus Children</td> <td>\$54.42</td> </tr> <tr> <td>Employee Plus Family</td> <td>\$82.25</td> </tr> </tbody> </table>			Service	Amount	Annual Maximum Benefit	\$1,250	Deductible Individual	\$50	Deductible Family	\$150	Rate Type	Amount	Employee	\$24.62	Employee Plus Spouse	\$50.23	Employee Plus Children	\$54.42	Employee Plus Family	\$82.25
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Exported plan with Plan Summary expanded — verify details then click Add

You have completed the full DropQuote + Employee Navigator integration workflow. The group is now linked, census data was used for quoting, and sold plans have been exported and finalized in Employee Navigator.

For questions or support, contact DropQuote at support@dropquote.com