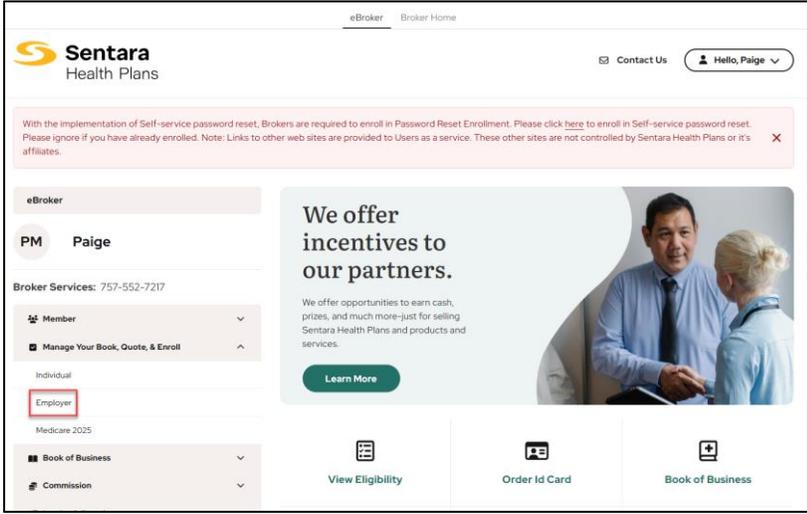
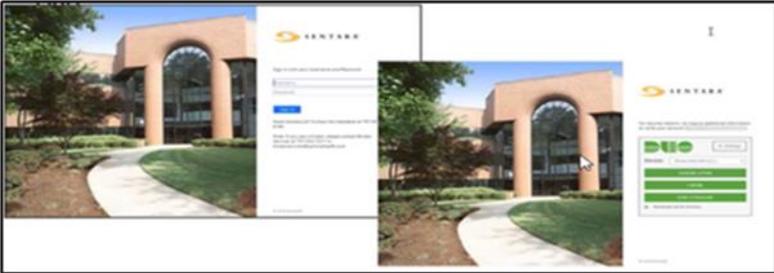
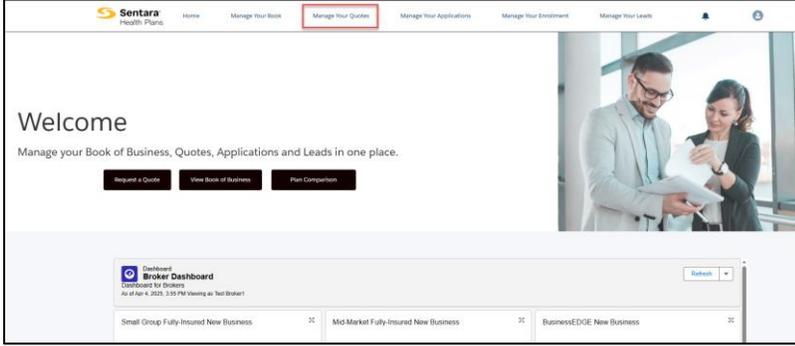
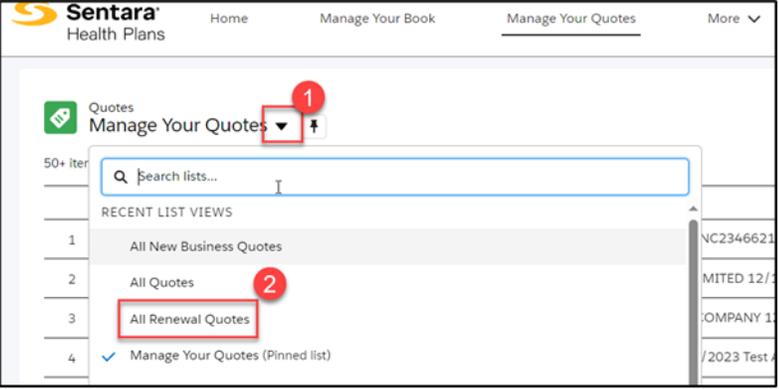
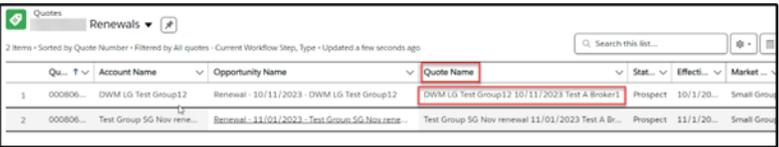
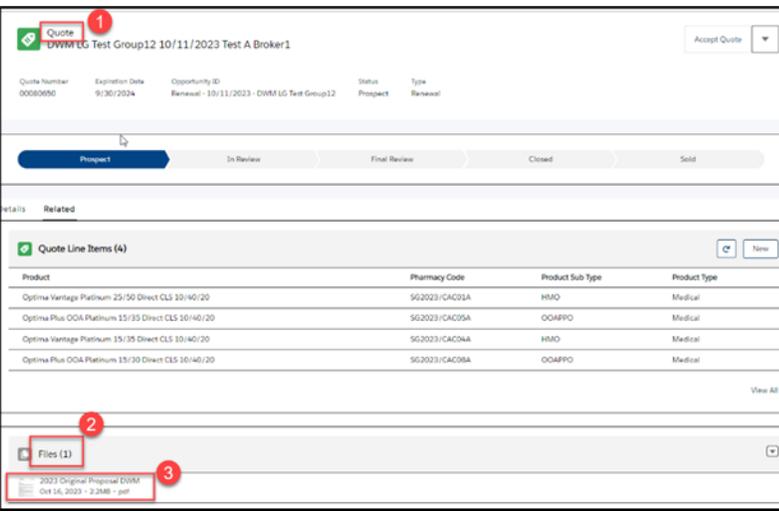


Purpose: Instructions to Access Renewals in eBroker.

<p>To Initiate the Renewal Process:</p>	<p>Even though Renewal Quotes may be displayed in your Renewal Quote queue, the Quote and Proposal will not be available to be shared with your group until the Sales Team has officially released it to you.</p> <p>Please note that your Sentara Health Plans Sales Team will notify you when the Group's Renewal Quote and Proposal are ready and available.</p>
<p>After you receive the notice from the Sales Rep that the Renewal has been released, and you login, the Sentara Health Plans landing page displays.</p> <p>Under Manage Your Book, Quote, & Enroll section, select Employer.</p>	
<p>You are prompted to sign in again and authenticate using Duo</p>	
<p>Click on Manage Your Quotes at the top of the page.</p>	

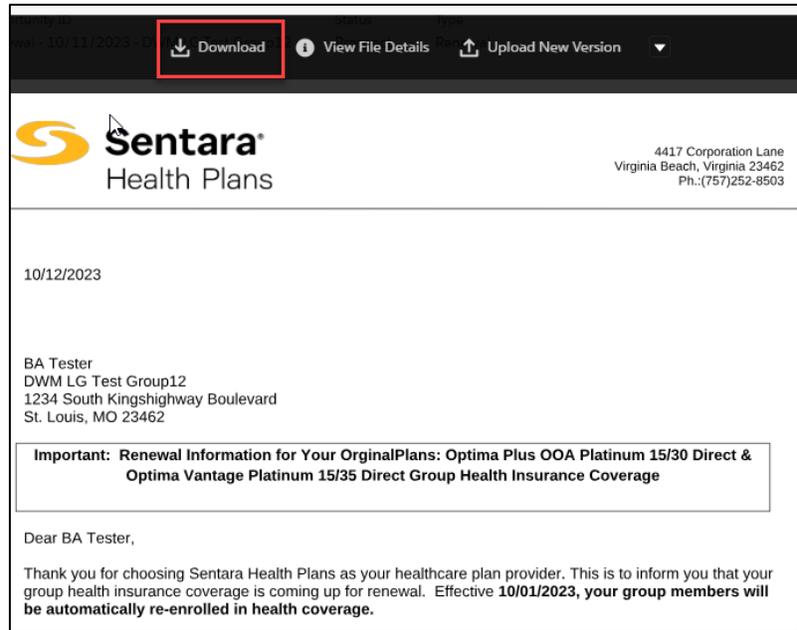
<ol style="list-style-type: none"> 1. Click on the down arrow in the top left next to Manage Your Quotes. 2. Click on All Renewal Quotes. 	
<p>Click on the Account Name listed under the Quote Name Column to access the Quote page for that Account.</p>	
<ol style="list-style-type: none"> 1. You are now on the Quote page. 2. At the bottom of the page is the Files section. 3. You should see a Proposal Document in the Files section. Click on the Proposal. <p>Note: The Sales Team will generate the Proposal for you. The Proposal is located in the Files section of the quote.</p>	

The **Proposal** displays.

Note: The Proposal replaces the GIS (General Information Sheet) and contains all the same information.

At the top, click on **Download** to download the **Proposal** document to your computer.

Click the “X,” to close the **Proposal** document and to return to the **Quote** page.

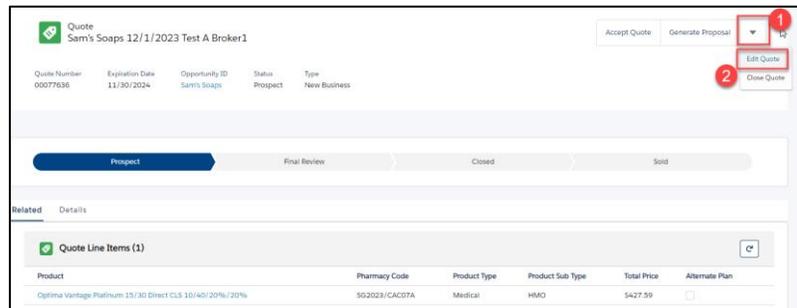


Edit the Quote

The purpose of editing a quote is to change or add additional plans on the quote, update the calendar vs contract year, or update contact information. Changes cannot be made to the quote that will impact the rates.

To Edit the Quote:

1. Go to the **Quote** page.
2. Click the arrow in the top left.
3. A dropdown menu displays. Click **Edit Quote**.



Make your edits on each screen, clicking **Next** to move through the editing process. If no edits are needed on a certain step of the process, click **Next**.

Group Information

Please enter your group information below.

*Effective Date
Dec 1 2023

*Group Name
Sam's Soaps

Search Address

*Street
1200 Independence Boulevard

*City
Virginia Beach

*State
VA

*Zip Code
23405

County
Virginia Beach City

*Total Number of Employees
1

*Eligible Number of Employees
1

*Number of Enrolled Employees
1

No Current Carrier

Industry Type

SIC Code

*Funding Type
 Level Funded
 Fully Insured

*Plan Type
 Calendar
 Contract

Save for later Next

Once your edits are complete, click **Go to Quote** to view the quote.

Quote Summary

Congratulations, your quote is updated!

Click Go To Quote to view your new quote.

Previous Go To Quote

Generate a Proposal

To **Generate a Proposal**:

1. Navigate to the **Quote** page
2. **Details** tab
3. Click the **Generate Proposal** button.

Quote 1 AI's Alligators 12/1/2023 Test A Broker1 (Test 123 Agency) 3 Generate Proposal Close Quote

Quote Number	Expiration Date	Opportunity ID	Status	Type
00080439	11/30/2024	AI's Alligators Test A Broker1 (Test 123 Agency)	Final Review	New Business

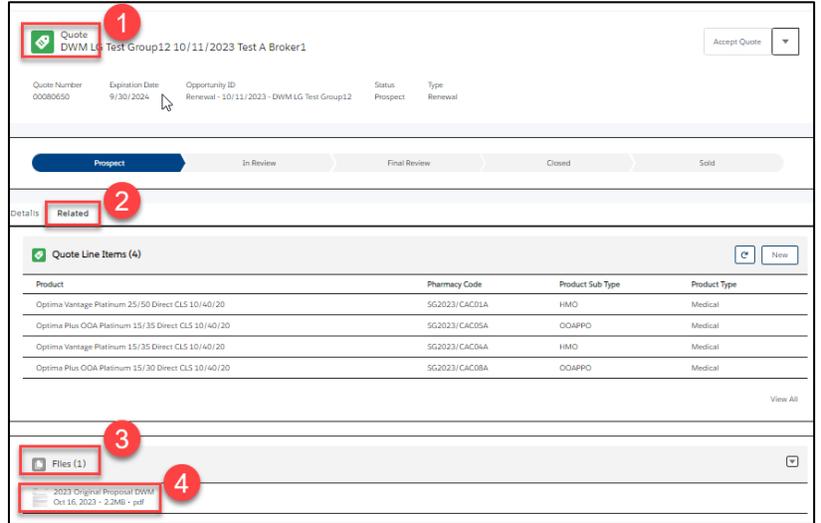
✓
✓
Final Review
Closed
Sold

Related 2 Details

Quote Number	00080439	Effective Date	12/1/2023
Quote Name	AI's Alligators 12/1/2023 Test A Broker1 (Test 123 Agency)	Expiration Date	11/30/2024
Opportunity Name	AI's Alligators Test A Broker1 (Test 123 Agency)	Renewal Month	December

To access the generated **Proposal**, navigate to:

1. **Quote** page
2. **Related** tab
3. **Files** section
4. Click on the **Proposal**



The screenshot shows the eBroker interface for a quote. At the top, there is a header with a 'Quote DWM LG' icon and a title 'Test Group12 10/11/2023 Test A Broker1'. Below this is a table with columns: Quote Number (00080650), Expiration Date (9/30/2024), Opportunity ID (Renewal - 10/11/2023 - DWM LG Test Group12), Status (Prospect), and Type (Renewal). A progress bar below the table shows stages: Prospect (active), In Review, Final Review, Closed, and Sold. Under the 'Details' section, the 'Related' tab is selected. Below the tabs is a table titled 'Quote Line Items (4)' with columns: Product, Pharmacy Code, Product Sub Type, and Product Type. The table lists four items, all with 'Medical' as the Product Type. At the bottom, there is a 'Files (1)' section containing a file named '2023 Original Proposal DWM Oct 16, 2023 - 2.2MB - pdf'. Red circles with numbers 1-4 highlight the 'Quote DWM LG' icon, the 'Related' tab, the 'Files (1)' section, and the specific file respectively.

Accepting A Renewal Quote - Moving Forward with Processing the Renewal

When the Group is ready to move forward with the Renewal, contact the Sentara Health Plans Sales Team via your normal process to inform them of this decision. There is no further action for you to take within eBroker. The Sales Team will manage the remaining steps in the Renewal Process.