

**Broker User Guide –
Small Group and Mid-Market
Renewals**

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Purpose

The purpose of this user guide is to outline the renewals process for small groups and mid-market on eBroker. The guide includes how to:

- navigate to renewal opportunities and quotes
- perform quote actions related to small group renewals
- perform quote actions related to mid-market renewals

View All Renewal Quotes

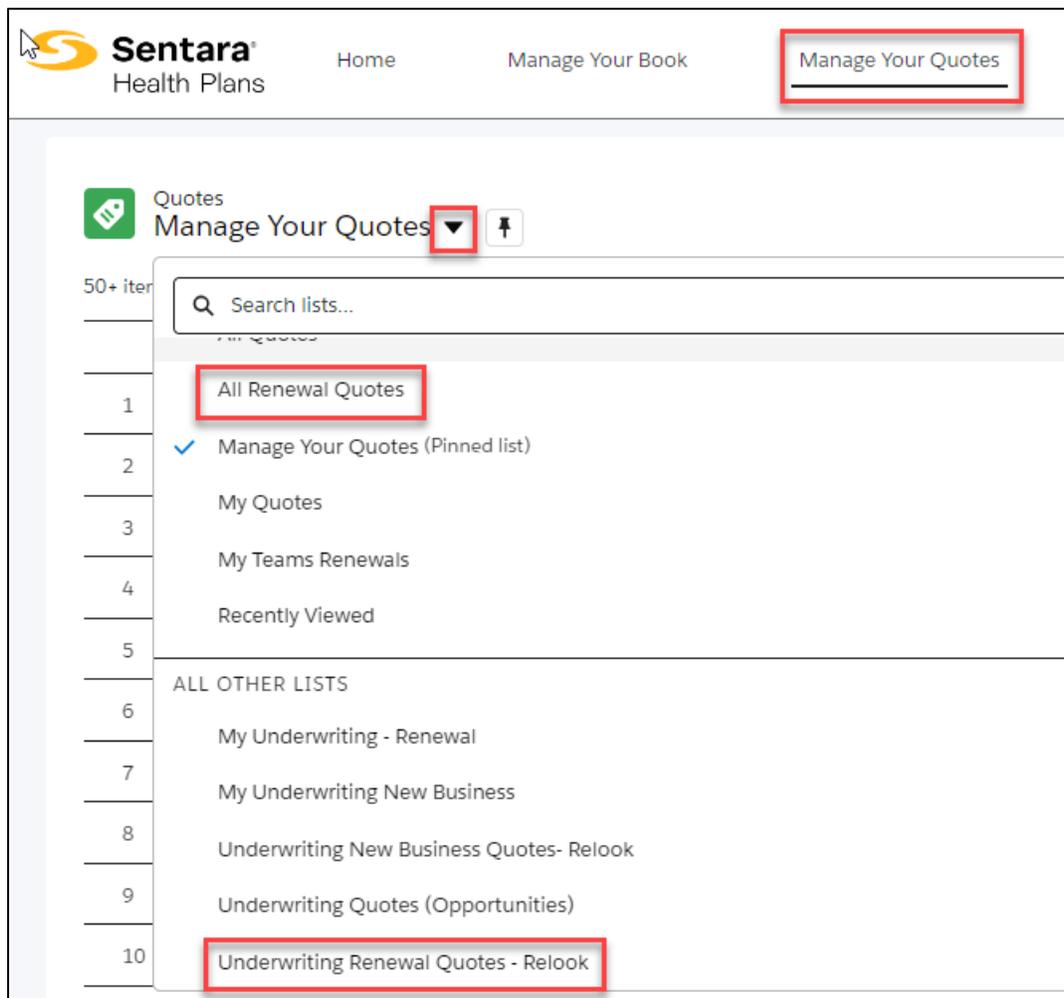
There are two methods to access your quotes:

1. from the **Manage Your Quotes** header on the top of the Broker Home Screen.
2. from the **View Report (Status of Renewals Business)** in the dashboard section of the Broker Home Screen.

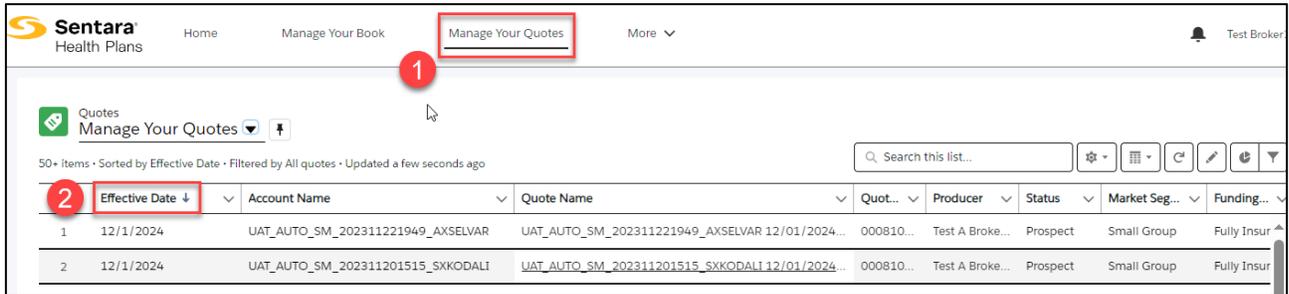
Manage Your Quotes

You can view upcoming renewal quotes from the **Manage Your Quotes** from any page on the eBroker site. From there you can:

1. select Mange Your Quotes from the top navigation from your home page
2. select the down arrow by the Manage Your Quotes list view
3. select All Renewal Quotes or Underwriting Renewal Quotes – Relook list views



The screenshot displays the Sentara Health Plans user interface. At the top, the navigation bar includes the Sentara logo, 'Home', 'Manage Your Book', and 'Manage Your Quotes' (highlighted with a red box). Below the navigation bar, the 'Quotes' section is visible, featuring a 'Manage Your Quotes' header with a dropdown arrow (highlighted with a red box) and a list view icon. A search bar labeled 'Search lists...' is present. The dropdown menu is open, showing a list of quote views: 'All Renewal Quotes' (highlighted with a red box), 'Manage Your Quotes (Pinned list)' (checked), 'My Quotes', 'My Teams Renewals', and 'Recently Viewed'. Below this, a section titled 'ALL OTHER LISTS' contains: 'My Underwriting - Renewal', 'My Underwriting New Business', 'Underwriting New Business Quotes- Relook', 'Underwriting Quotes (Opportunities)', and 'Underwriting Renewal Quotes - Relook' (highlighted with a red box).



50+ Items • Sorted by Effective Date • Filtered by All quotes • Updated a few seconds ago

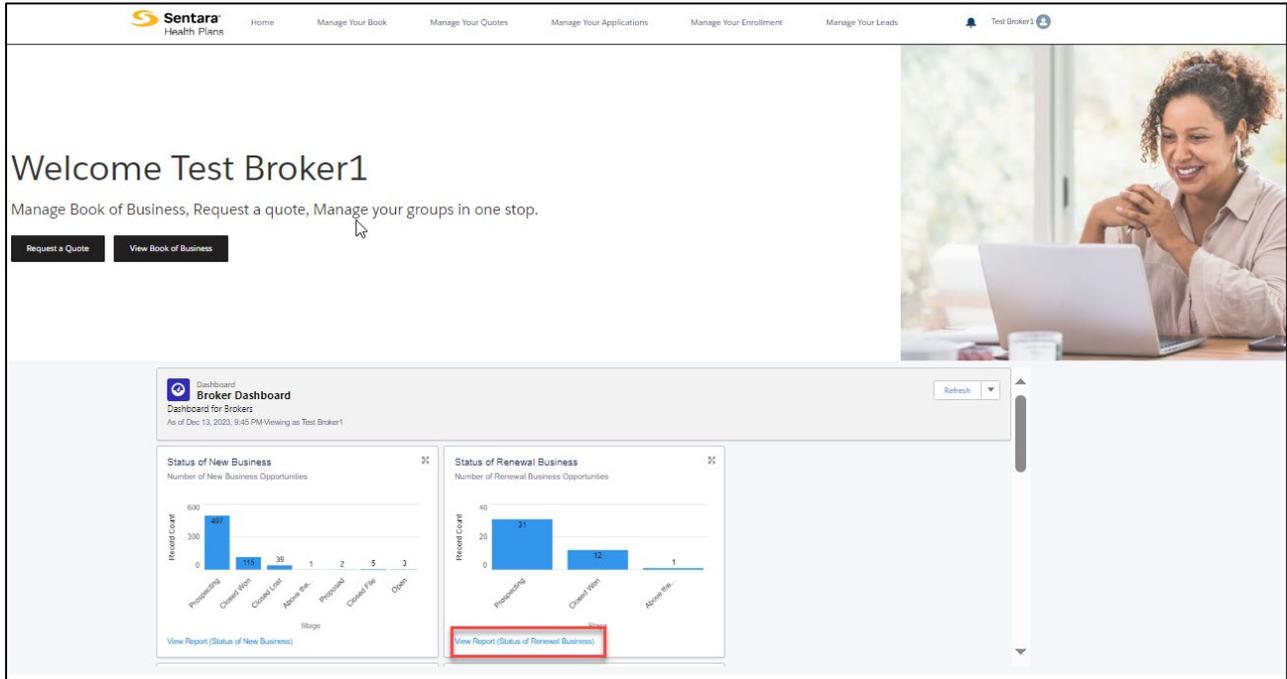
	Effective Date ↓	Account Name	Quote Name	Quot...	Producer	Status	Market Seg...	Funding...
1	12/1/2024	UAT_AUTO_SM_202311221949_AXSELVAR	UAT_AUTO_SM_202311221949_AXSELVAR 12/01/2024...	000810...	Test A Broke...	Prospect	Small Group	Fully Insur
2	12/1/2024	UAT_AUTO_SM_202311201515_SXKODALI	UAT_AUTO_SM_202311201515_SXKODALI 12/01/2024...	000810...	Test A Broke...	Prospect	Small Group	Fully Insur

Notes:

1. For small group renewals, you can view a quote by clicking the **Quote Name** or **Quote Number** to work on the quote. Refer to the **Quote Actions: Small Group** section of this user guide for more information.
2. For mid-market renewals, you cannot engage in any quote-related activities until Sentara Health Plans has released the quote for review.
3. Sort by effective date by clicking the **Effective Date** header from the list view.

View Report (Status of Renewals Business).

You can view upcoming renewal quote opportunities from your home screen by clicking **View Report (Status of Renewals Business)** on the home screen dashboard report.

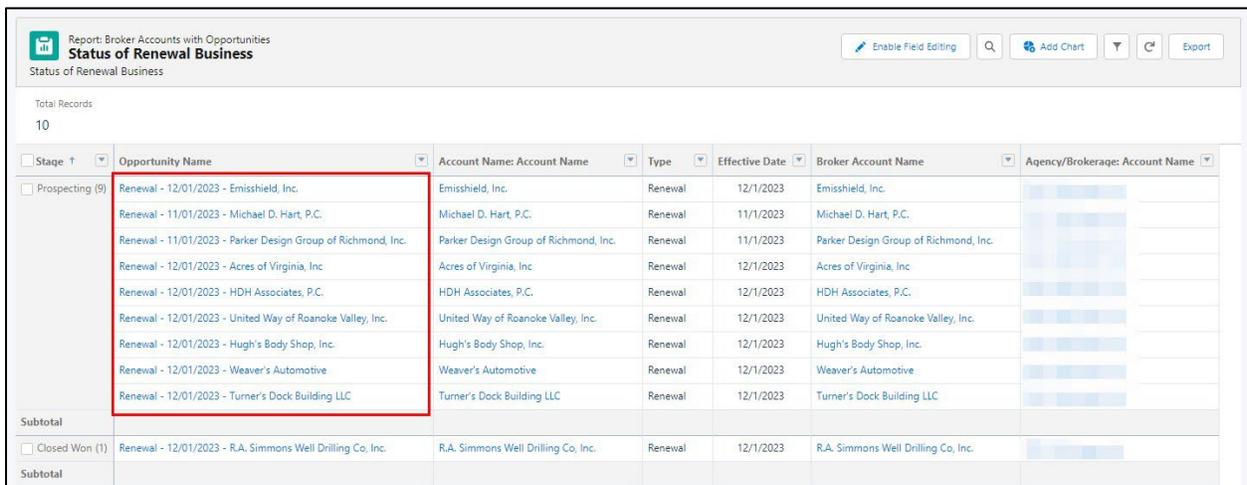


The screenshot shows the Sentara Broker Dashboard for Test Broker1. The dashboard includes navigation links at the top and a main content area with two bar charts. The 'Status of Renewal Business' chart is highlighted with a red box, and its corresponding 'View Report' link is also highlighted.

Stage	Count
Prospecting	497
Closed Won	119
Closed Lost	39
Above the...	1
Proposed	2
Closed File	5
Open	3

Stage	Count
Prospecting	31
Closed Won	12
Above the...	1

From the “Status of Renewal Business” Report, select the renewal opportunity you’d like to view or work on by clicking the blue hyperlinked font under the **Opportunity Name**.

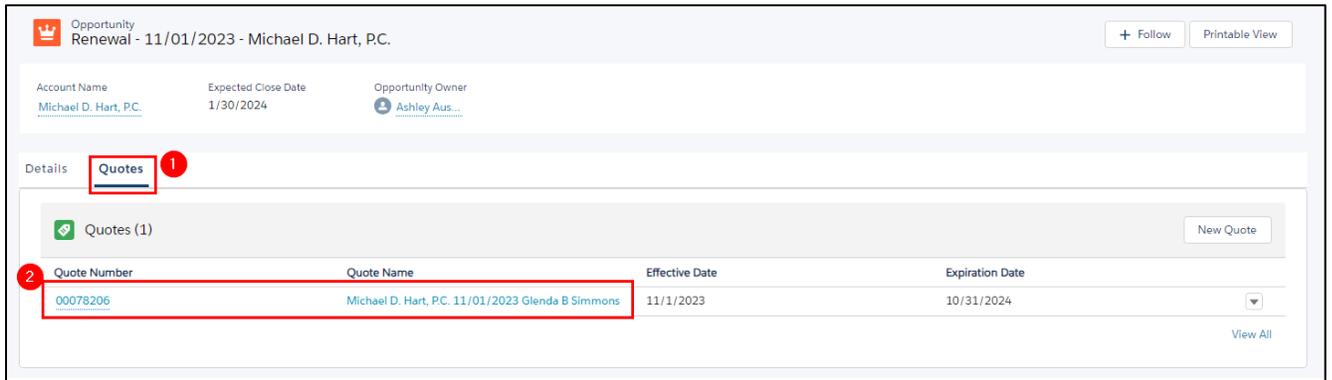


The screenshot shows a table titled 'Status of Renewal Business' with 10 total records. The first row is highlighted with a red border, indicating the selected opportunity.

Stage	Opportunity Name	Account Name: Account Name	Type	Effective Date	Broker Account Name	Agency/Brokerage: Account Name
Prospecting (9)	Renewal - 12/01/2023 - Emisshield, Inc.	Emisshield, Inc.	Renewal	12/1/2023	Emisshield, Inc.	
	Renewal - 11/01/2023 - Michael D. Hart, P.C.	Michael D. Hart, P.C.	Renewal	11/1/2023	Michael D. Hart, P.C.	
	Renewal - 11/01/2023 - Parker Design Group of Richmond, Inc.	Parker Design Group of Richmond, Inc.	Renewal	11/1/2023	Parker Design Group of Richmond, Inc.	
	Renewal - 12/01/2023 - Acres of Virginia, Inc.	Acres of Virginia, Inc.	Renewal	12/1/2023	Acres of Virginia, Inc.	
	Renewal - 12/01/2023 - HDH Associates, P.C.	HDH Associates, P.C.	Renewal	12/1/2023	HDH Associates, P.C.	
	Renewal - 12/01/2023 - United Way of Roanoke Valley, Inc.	United Way of Roanoke Valley, Inc.	Renewal	12/1/2023	United Way of Roanoke Valley, Inc.	
	Renewal - 12/01/2023 - Hugh's Body Shop, Inc.	Hugh's Body Shop, Inc.	Renewal	12/1/2023	Hugh's Body Shop, Inc.	
	Renewal - 12/01/2023 - Weaver's Automotive	Weaver's Automotive	Renewal	12/1/2023	Weaver's Automotive	
	Renewal - 12/01/2023 - Turner's Dock Building LLC	Turner's Dock Building LLC	Renewal	12/1/2023	Turner's Dock Building LLC	
Subtotal						
Closed Won (1)	Renewal - 12/01/2023 - R.A. Simmons Well Drilling Co, Inc.	R.A. Simmons Well Drilling Co, Inc.	Renewal	12/1/2023	R.A. Simmons Well Drilling Co, Inc.	
Subtotal						

Renewal business quotes are accessed from the Opportunity page. To view quotes for renewal business, click:

1. **Quotes** (under the static opportunity information), then
2. the **Quote Number** or **Quote Name** of the quote you'd like to access.



Opportunity
Renewal - 11/01/2023 - Michael D. Hart, P.C.

Account Name: Michael D. Hart, P.C. | Expected Close Date: 1/30/2024 | Opportunity Owner: Ashley Aus...

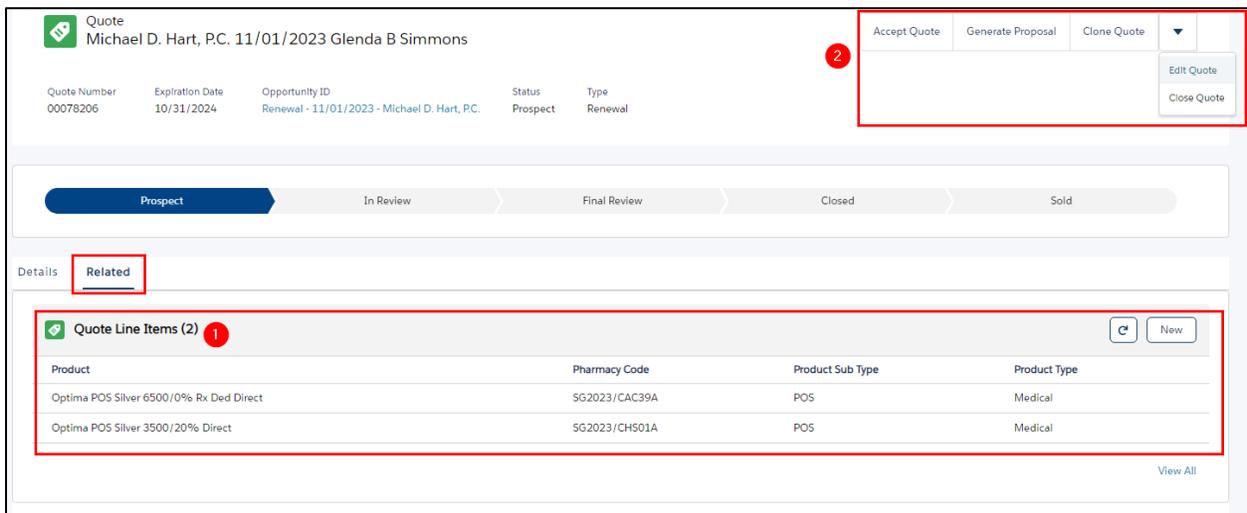
Details: **Quotes** (1)

Quote Number	Quote Name	Effective Date	Expiration Date
00078206	Michael D. Hart, P.C. 11/01/2023 Glenda B Simmons	11/1/2023	10/31/2024

Quote Actions: Small Group

From the **Related** tab on the Quote page, you can

1. view the plans included in the quote, and
2. perform a variety of quote actions, including Accept Quote, Generate Proposal, Clone Quote, Edit Quote, and Close the Quote.



Quote
Michael D. Hart, P.C. 11/01/2023 Glenda B Simmons

Quote Number: 00078206 | Expiration Date: 10/31/2024 | Opportunity ID: Renewal - 11/01/2023 - Michael D. Hart, P.C. | Status: Prospect | Type: Renewal

Actions: Accept Quote, Generate Proposal, Clone Quote, Edit Quote, Close Quote

Progress: Prospect (Active) | In Review | Final Review | Closed | Sold

Details: **Related**

Product	Pharmacy Code	Product Sub Type	Product Type
Optima POS Silver 6500/0% Rx Ded Direct	SG2023/CAC39A	POS	Medical
Optima POS Silver 3500/20% Direct	SG2023/CH501A	POS	Medical

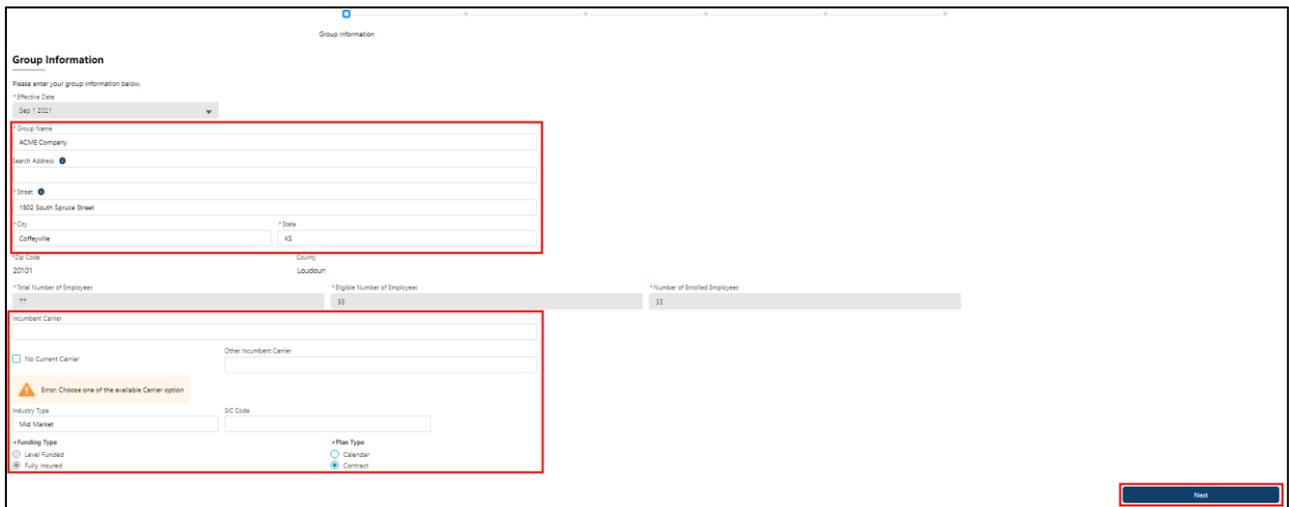
Edit a Quote

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.

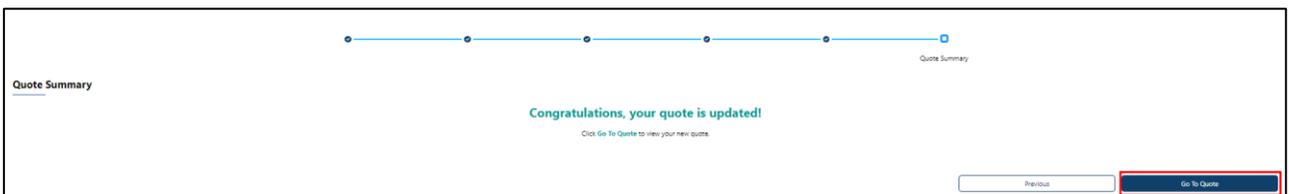
To edit a quote, click on **Edit Quote** from the **Quote** page.



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.



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



Clone a Quote

The purpose of cloning a quote is so you can have multiple quotes under one opportunity. Cloning a quote will allow you to apply different plans, funding types and change the census.

A quote can be cloned from any status by clicking **Clone Quote**. Cloning will keep all the quotes grouped together under one opportunity if the address of the account doesn't change, the existing opportunity's Status is set to "Prospecting" and the quote effective date is the same year as the original Opportunity. If a quote does not meet these criteria, it will create a separate opportunity and the new quote will be connected to a new opportunity.

You need to enter the effective date and select the plans from the **Plan Selection** page before you can proceed with cloning the quote. The remaining fields such as group information, contact details and census information are carried over from the original quote, however you have the flexibility to change any details as necessary. Once the quote is cloned, the quote status is set to **In Review if underwriting is required**. If underwriting is not necessary, you can proceed with generating a proposal for Small Group.



The screenshot displays a quote management interface. At the top left, there is a green icon with a white 'Q' and the text 'Quote Acme Group 9/1/2021 John Broker'. In the top right corner, there are two buttons: 'Clone Quote' (highlighted with a red box) and 'Close Quote'. Below this is a table with the following data:

Quote Number	Expiration Date	Opportunity ID	Status	Total Price	Type
00000863	8/31/2022	Acme Group 9/1/2021	In Review	50.00	New Business

At the bottom of the interface, there is a progress bar with five stages: 'In Review' (highlighted in blue), 'Underwritten', 'Final Review', 'Closed', and 'Sold'.

Generate Proposal

When the plans have been chosen, you can generate a proposal to share with your customers.

Please note that the sales team may have already created a proposal for the quote. If so, you do not need to generate a proposal. The proposal is available in the 'File section of the Quote'. From there, you can view and download the PDF by clicking on the document.

 **Quote Line Items (8)**

↻ New

Product	Pharmacy Code	Product Type	Product Sub Type	Total Price	Alternate F
Optima Vantage 3000/30/30% CLS 10 BD; 45/75/20% AD; 150 RX DED	MM2023_CAC90A	Medical	HMO	\$0.00	<input checked="" type="checkbox"/>
Optima Plus Equity 5000/30% CLS 10/40/60/20% AD	MM2023_CHS59A	Medical	PPO	\$0.00	<input checked="" type="checkbox"/>
Optima Plus Equity 5000/0% CLS 10/40/60/20% AD	MM2023_CHS59A	Medical	PPO	\$0.00	<input type="checkbox"/>
Optima Vantage 4000/30/30% CLS 10 BD; 45/75/20% AD; 150 RX DED	MM2023_CAC98A	Medical	HMO	\$0.00	<input type="checkbox"/>
Optima Vantage 3000/30/20% CLS 10 BD; 45/75/20% AD; 150 RX DED	MM2023_CAC90A	Medical	HMO	\$0.00	<input type="checkbox"/>

[View All](#)

 **Files (1)**

Add Files



[Proposal Document.pdf](#)

Jul 14, 2023 • 318KB • pdf

[View All](#)

If a proposal has not been generated, you can generate a proposal by clicking **Generate a Proposal**.

 **Quote**
 Michael D. Hart, P.C. 11/01/2023

Generate Proposal Clone Quote Close Quote

Quote Number	Expiration Date	Opportunity ID	Status	Type
00078206	10/31/2024	Renewal - 11/01/2023 - Michael D. Hart, P.C.	Final Review	Renewal

✓

✓

Final Review

→

→

Details	Related
Quote Number 00078206	Effective Date 11/1/2023
Quote Name Michael D. Hart, P.C. 11/01/2023 Glenda B Simmons	Expiration Date 10/31/2024
Opportunity Name Renewal - 11/01/2023 - Michael D. Hart, P.C.	Renewal Month November
Account Name Michael D. Hart, P.C.	Status Final Review
Funding Type Fully Insured	Status Reason

Select a **Rate Type** (age banded or composite) for Small Group and click **Next**.

Rating Options

• Select Rates Type to generate proposal

Age Banded

Composite

Next

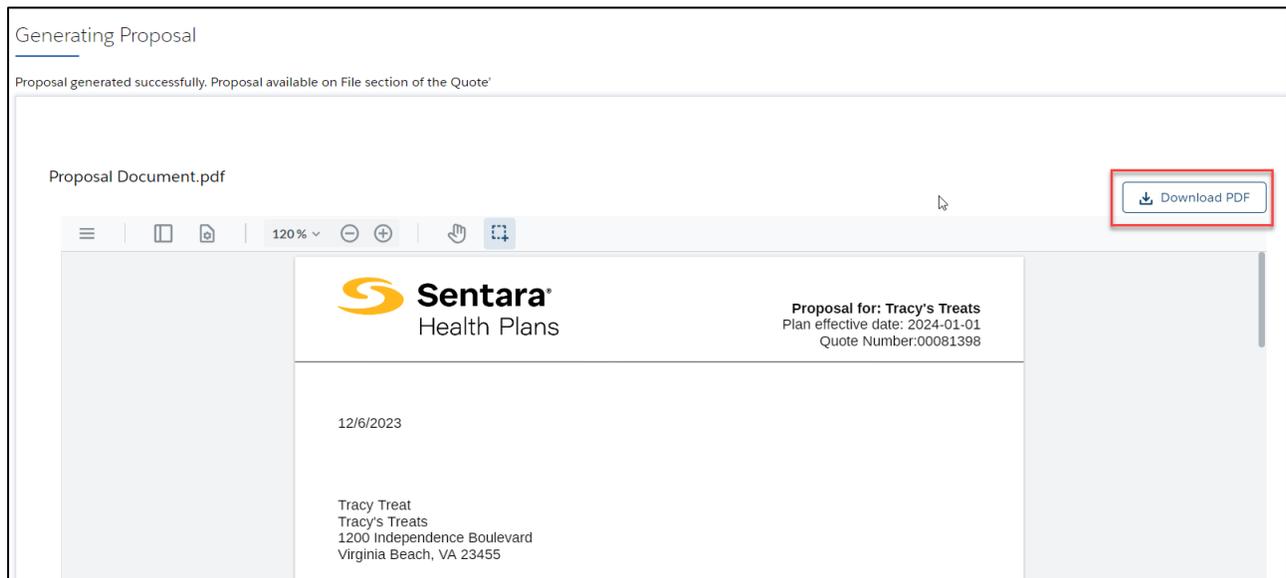
On the next screen a message appears indicating your proposal generated successfully, your proposal document displays. The proposal is also available on the 'File section of the Quote'. You can **download to PDF** from this screen as well.

Generating Proposal

Proposal generated successfully. Proposal available on File section of the Quote'

Proposal Document.pdf

Download PDF



12/6/2023

Tracy Treat
Tracy's Treats
1200 Independence Boulevard
Virginia Beach, VA 23455

Sentara[®]
Health Plans

Proposal for: Tracy's Treats
Plan effective date: 2024-01-01
Quote Number:00081398

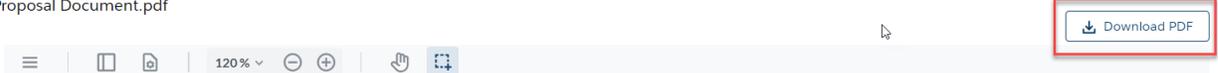
Proposal Preview Issue

There is a known issue when generating a proposal preview that it may not display in the preview field. When the **Download PDF** button displays in blue, that indicates that the proposal has been created. To view the document, scroll down to the bottom of the screen and click **Back to Quote**. The Proposal is accessible in the Files section of the Quote. You can view the full document by opening the Proposal Document in the Files section.

Generating Proposal

Proposal generated successfully. Proposal available on File section of the Quote*

Proposal Document.pdf





Proposal for: Tracy's Treats
Plan effective date: 2024-01-01
Quote Number:00081398

12/6/2023

Tracy Treat
Tracy's Treats
1200 Independence Boulevard
Virginia Beach, VA 23455

Quote Line Items (8) [Refresh](#) [New](#)

Product	Pharmacy Code	Product Type	Product Sub Type	Total Price	Alternate F
Optima Vantage 3000/30/30% CLS 10 BD; 45/75/20% AD; 150 RX DED	MM2023_CAC90A	Medical	HMO	\$0.00	<input checked="" type="checkbox"/>
Optima Plus Equity 5000/30% CLS 10/40/60/20% AD	MM2023_CHS59A	Medical	PPO	\$0.00	<input checked="" type="checkbox"/>
Optima Plus Equity 5000/0% CLS 10/40/60/20% AD	MM2023_CHS59A	Medical	PPO	\$0.00	<input type="checkbox"/>
Optima Vantage 4000/30/30% CLS 10 BD; 45/75/20% AD; 150 RX DED	MM2023_CAC98A	Medical	HMO	\$0.00	<input type="checkbox"/>
Optima Vantage 3000/30/20% CLS 10 BD; 45/75/20% AD; 150 RX DED	MM2023_CAC90A	Medical	HMO	\$0.00	<input type="checkbox"/>

[View All](#)

Files (1) [Add Files](#)



[Proposal Document.pdf](#)
Jul 14, 2023 • 318KB • pdf

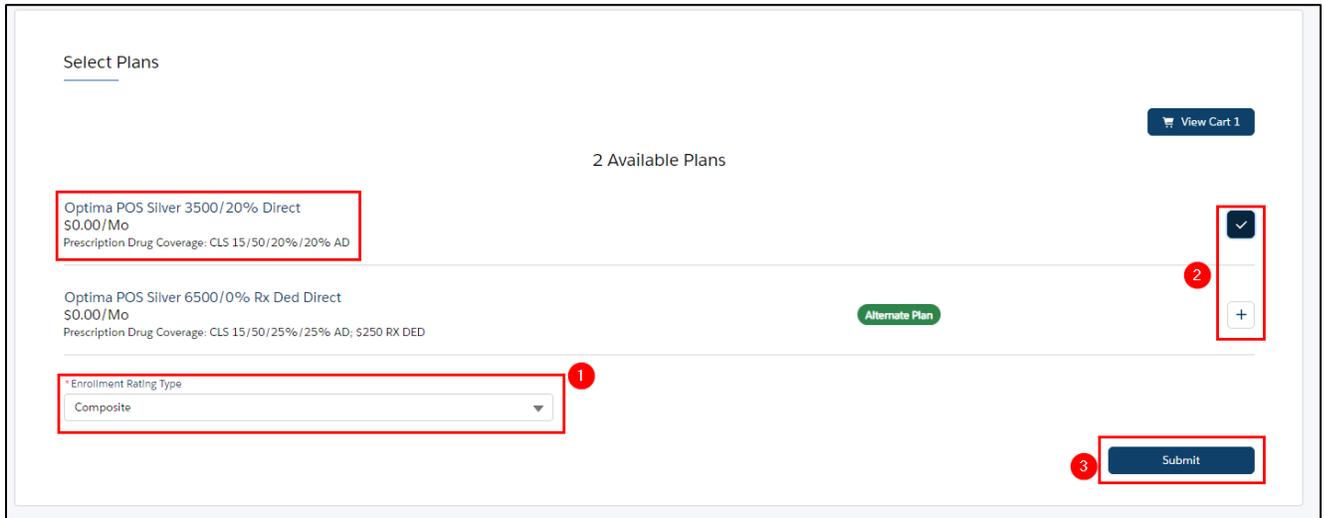
[View All](#)

Accept Quote

If a quote contains several plan options, you can select which plans you want to accept in the quote at this point. There is no need to edit the quote to delete unwanted plans.

When you click **Accept Quote**, you will have the option to view the cost per month of the plans quoted and all the plans that were presented on the quote.

1. You must select the enrollment rating type for Small Group.
2. You must select the plans that you want to accept for the quote. Add a plan or multiple plans to your cart by clicking the “+” icon. When a plan is in your cart, you will see a checkmark icon.
3. When you are finished adding your plans to the cart, click **Submit**.



The screenshot shows a 'Select Plans' interface with the following elements:

- 2 Available Plans:** Two plan options are listed. The first is 'Optima POS Silver 3500/20% Direct' with a \$0.00/Mo premium and CLS 15/50/20%/20% AD prescription drug coverage. The second is 'Optima POS Silver 6500/0% Rx Ded Direct' with a \$0.00/Mo premium and CLS 15/50/25%/25% AD, \$250 RX DED prescription drug coverage. A green 'Alternate Plan' button is located between the two plans.
- Enrollment Rating Type:** A dropdown menu is set to 'Composite', highlighted with a red box and the number 1.
- Plan Selection:** A red box and the number 2 highlight the selection controls for the first plan, including a checkmark icon (indicating it is selected) and a plus icon (for adding to the cart).
- Submit Button:** A blue 'Submit' button is highlighted with a red box and the number 3.
- View Cart:** A blue 'View Cart 1' button is located in the top right corner.

After completing this portion of the process, the renewal will move into the Group Application stage.

Application
a1r8K000002OI8
Submit Application Add Group Classes Import Membership

▼
Application Uploaded
Rejected
Submitted
Membership Uploaded
Membership Approved

Guidance for Success
Group application is being processed.

Details Required Application Documents

Application Name
a1r8K000002OI8

Account
[Michael D. Hart, P.C.](#)

Opportunity
[Renewal - 11/01/2023 - Michael D. Hart, P.C.](#)

Quote
[Michael D. Hart, P.C. 11/01/2023 Glenda B Simmons](#)

Census

Contract

Created By
[William Kite](#), 7/6/2023, 1:52 PM

Status
Application Uploaded

Application Type
Renewal

Broker Account
[Michael D. Hart, P.C.](#)

Owner
[\[Redacted\]](#)

Sales Rep
[\[Redacted\]](#)

Primary Applicant Contact
[\[Redacted\]](#)

Mode of Eligibility
Web (Import or hand pick) / Spreadsheet

Last Modified By
[\[Redacted\]](#) 7/6/2023, 1:53 PM

Please refer to the appropriate Quote User Guide available on the [Broker Training Page](#) on our website for these process flows.

Note: Once a small group quote is accepted, the Opportunity status will change to **Closed Won** on the Status Report.

Report: Broker Accounts with Opportunities
Status of Renewal Business
Status of Renewal Business
Enable Field Editing 🔍 Add Chart 📄 Export

Total Records
10

<input type="checkbox"/> Stage ↑	Opportunity Name	Account Name: Account Name	Type	Effective Date	Broker Account Name	Agency/Brokerage: Account Name
<input type="checkbox"/> Prospecting (8)	Renewal - 12/01/2023 - Emisshield, Inc.	Emisshield, Inc.	Renewal	12/1/2023	Emisshield, Inc.	[Redacted]
	Renewal - 11/01/2023 - Parker Design Group of Richmond, Inc.	Parker Design Group of Richmond, Inc.	Renewal	11/1/2023	Parker Design Group of Richmond, Inc.	[Redacted]
	Renewal - 12/01/2023 - Acres of Virginia, Inc.	Acres of Virginia, Inc.	Renewal	12/1/2023	Acres of Virginia, Inc.	[Redacted]
	Renewal - 12/01/2023 - HDH Associates, P.C.	HDH Associates, P.C.	Renewal	12/1/2023	HDH Associates, P.C.	[Redacted]
	Renewal - 12/01/2023 - United Way of Roanoke Valley, Inc.	United Way of Roanoke Valley, Inc.	Renewal	12/1/2023	United Way of Roanoke Valley, Inc.	[Redacted]
	Renewal - 12/01/2023 - Hugh's Body Shop, Inc.	Hugh's Body Shop, Inc.	Renewal	12/1/2023	Hugh's Body Shop, Inc.	[Redacted]
	Renewal - 12/01/2023 - Weaver's Automotive	Weaver's Automotive	Renewal	12/1/2023	Weaver's Automotive	[Redacted]
	Renewal - 12/01/2023 - Turner's Dock Building LLC	Turner's Dock Building LLC	Renewal	12/1/2023	Turner's Dock Building LLC	[Redacted]
Subtotal						
<input type="checkbox"/> Closed Won (2)	Renewal - 11/01/2023 - Michael D. Hart, P.C.	Michael D. Hart, P.C.	Renewal	11/1/2023	Michael D. Hart, P.C.	[Redacted]
	Renewal - 12/01/2023 - R.A. Simmons Well Drilling Co, Inc.	R.A. Simmons Well Drilling Co, Inc.	Renewal	12/1/2023	R.A. Simmons Well Drilling Co, Inc.	[Redacted]
Subtotal						
Total (10)						

Row Counts
Detail Rows
Subtotals
Grand Total

Close a Quote

You can close a quote by clicking **Close Quote**.



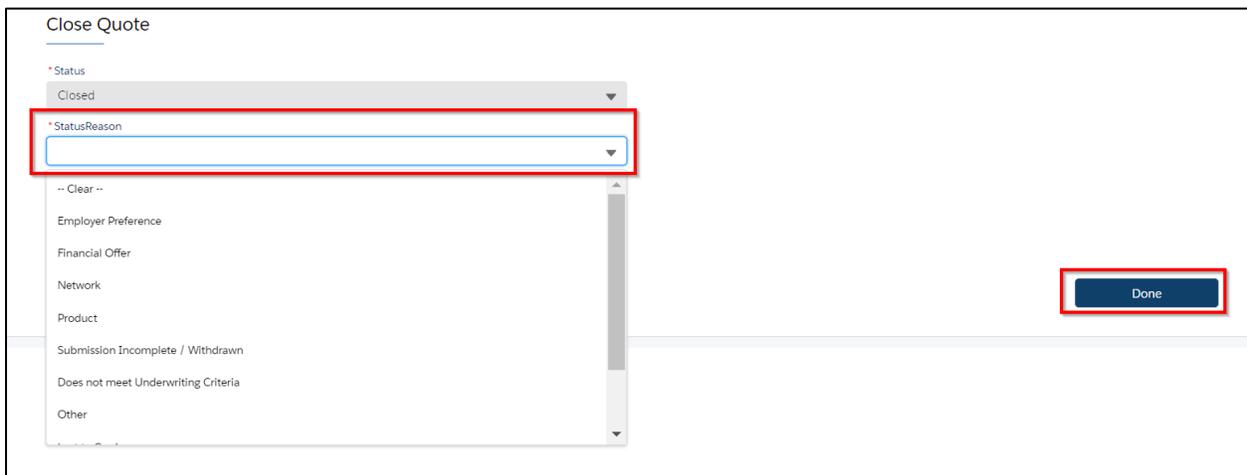
Quote
Test Oct 15 10/1/2021 Barbara Penn

Accept Quote Generate Proposal Clone Quote ▾

Quote Number	Expiration Date	Opportunity ID	Status	Type
00059100	9/30/2022	Test Oct 15 10/1/2021 Barbara Penn	Prospect	New Business

Edit Quote
Close Quote

Choose a **Status Reason** from the drop down and then click **Done**.



Close Quote

* Status
Closed ▾

* StatusReason
▾

-- Clear --

Employer Preference
Financial Offer
Network
Product
Submission Incomplete / Withdrawn
Does not meet Underwriting Criteria
Other

Done

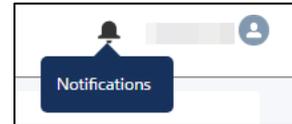
Please refer to the appropriate Quote User Guide available on the [Broker Training Page](#) on our website for these process flows.

Quote Actions: Mid-Market and Level Funded

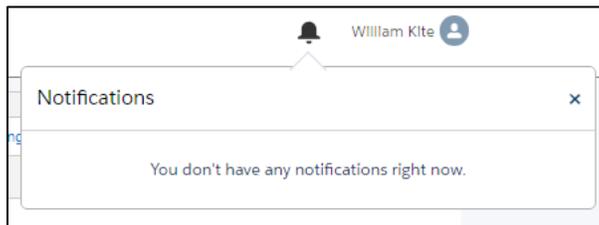
Receive a Renewal Quote

When the Sentara Health Plans team is finished calculating the rates for your renewal quote, they will release it to you for your review.

You will be notified of this via the notifications bell at the top of the eBroker site. A red number (or numbers) will appear.



Click the bell to view your notifications, and then click the notification to view.

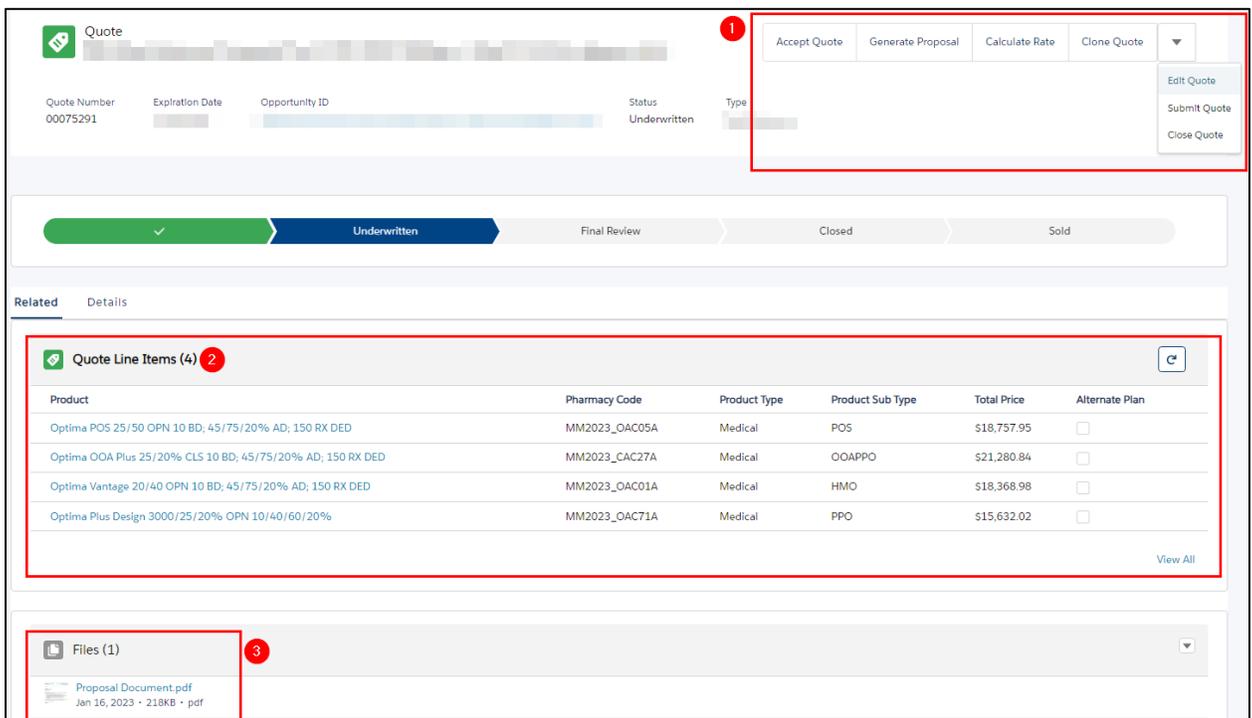


The released quotes are also visible and accessible through the dashboards and list process as detailed at the beginning of this user guide.

View the Quote

Once the quote is released to you for review, you can:

1. Perform a variety of actions related to the quote, including Accept Quote, Generate Proposal for Mid-Market Fully Insured, Calculate Rates for Mid-Market Fully Insured, Clone Quote, Edit Quote, Submit Quote, and Close Quote.
2. View details of each quote line item by clicking on a linked product
3. View the BusinessEDGE proposal document in the file section.



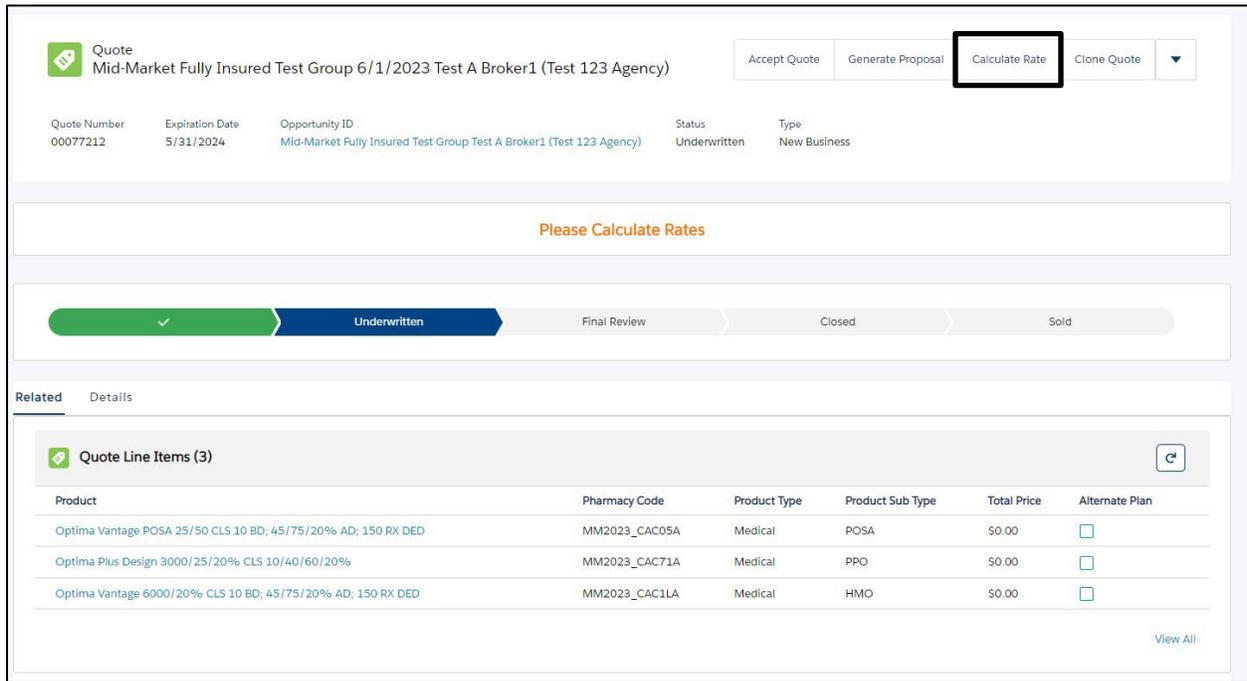
The screenshot displays the Quote management interface. At the top, a 'Quote' header includes a dropdown menu with options: Accept Quote, Generate Proposal, Calculate Rate, Clone Quote, Edit Quote, Submit Quote, and Close Quote. Below this, a progress bar shows the status 'Underwritten' as the current step, with other stages being 'Final Review', 'Closed', and 'Sold'. The 'Related' section contains a 'Quote Line Items (4)' table with the following data:

Product	Pharmacy Code	Product Type	Product Sub Type	Total Price	Alternate Plan
Optima POS 25/50 OPN 10 BD; 45/75/20% AD; 150 RX DED	MM2023_OAC05A	Medical	POS	\$18,757.95	<input type="checkbox"/>
Optima OOA Plus 25/20% CLS 10 BD; 45/75/20% AD; 150 RX DED	MM2023_CAC27A	Medical	OOAPPO	\$21,280.84	<input type="checkbox"/>
Optima Vantage 20/40 OPN 10 BD; 45/75/20% AD; 150 RX DED	MM2023_OAC01A	Medical	HMO	\$18,368.98	<input type="checkbox"/>
Optima Plus Design 3000/25/20% OPN 10/40/60/20%	MM2023_OAC71A	Medical	PPO	\$15,632.02	<input type="checkbox"/>

At the bottom, the 'Files (1)' section shows a 'Proposal Document.pdf' file with a date of Jan 16, 2023 and a size of 218KB.

Calculate Rates for Mid-Market Fully Insured Edited Quotes

If you have edited a Mid-Market quote and added new plans, you need to calculate rates for the new plans by clicking **Calculate Rate**.



The screenshot shows a quote management interface for a quote titled "Mid-Market Fully Insured Test Group 6/1/2023 Test A Broker1 (Test 123 Agency)". At the top right, there are four buttons: "Accept Quote", "Generate Proposal", "Calculate Rate" (highlighted with a black box), and "Clone Quote". Below the buttons, the quote details are displayed: Quote Number 00077212, Expiration Date 5/31/2024, Opportunity ID Mid-Market Fully Insured Test Group Test A Broker1 (Test 123 Agency), Status Underwritten, and Type New Business. A progress bar shows the quote is currently in the "Underwritten" stage. Below the progress bar, there is a "Related" section with a "Details" tab. Under "Details", there is a "Quote Line Items (3)" section with a table of items:

Product	Pharmacy Code	Product Type	Product Sub Type	Total Price	Alternate Plan
Optima Vantage POSA 25/50 CLS 10 BD; 45/75/20% AD; 150 RX DED	MM2023_CAC05A	Medical	POSA	\$0.00	<input type="checkbox"/>
Optima Plus Design 3000/25/20% CLS 10/40/60/20%	MM2023_CAC71A	Medical	PPO	\$0.00	<input type="checkbox"/>
Optima Vantage 6000/20% CLS 10 BD; 45/75/20% AD; 150 RX DED	MM2023_CAC1LA	Medical	HMO	\$0.00	<input type="checkbox"/>

A "View All" link is located at the bottom right of the table.

You can now generate a new proposal with your selected plans and rates.

Accept Quote

To accept the quote, click **Accept Quote**. After clicking accept quote, you will follow the same process flow for accepting a new business quote, detailed in this user guide.

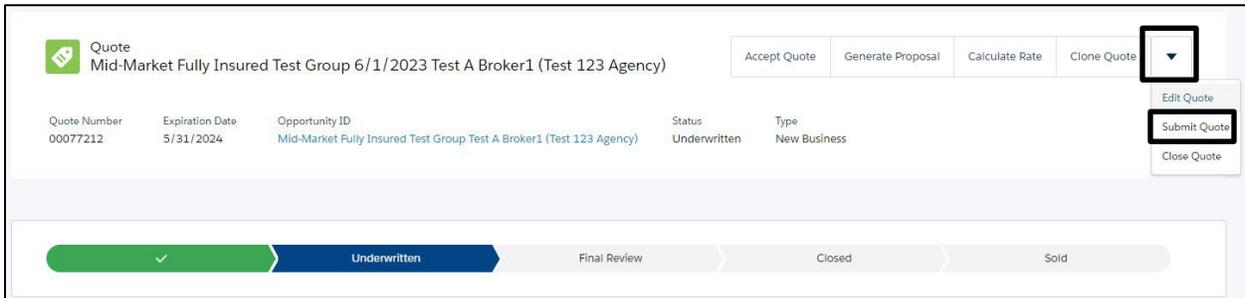


This image shows a close-up of the top right corner of the quote management interface. It features four buttons: "Accept Quote" (highlighted with a red box), "Generate Proposal", "Calculate Rate", and "Clone Quote". A dropdown arrow is visible to the right of the "Clone Quote" button.

Send Quote for Relook

If you need to submit the quote for the Sentara Health Plans Sales Team to review or negotiate rates, click the

Down Arrow then click **Submit Quote**.

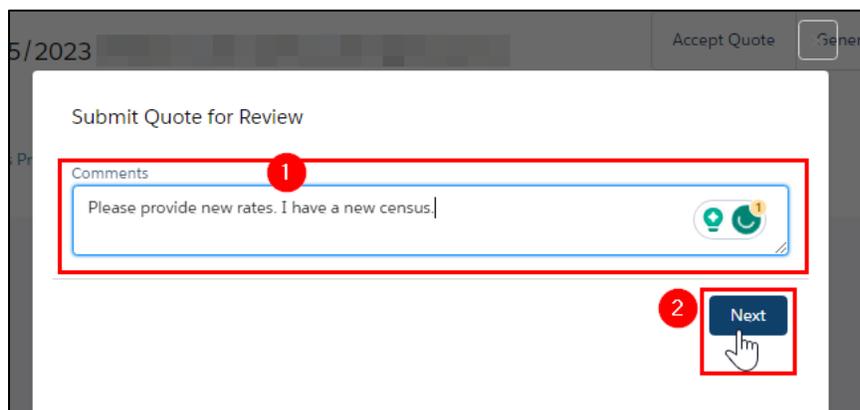


The screenshot shows a quote management interface. At the top, there is a quote title: "Quote Mid-Market Fully Insured Test Group 6/1/2023 Test A Broker1 (Test 123 Agency)". Below this, there are several buttons: "Accept Quote", "Generate Proposal", "Calculate Rate", "Clone Quote", and a dropdown arrow. A table below the buttons displays quote details:

Quote Number	Expiration Date	Opportunity ID	Status	Type
00077212	5/31/2024	Mid-Market Fully Insured Test Group Test A Broker1 (Test 123 Agency)	Underwritten	New Business

Below the table, there is a progress bar with five stages: a green checkmark, "Underwritten", "Final Review", "Closed", and "Sold". On the right side, there is a dropdown menu with options: "Edit Quote", "Submit Quote", and "Close Quote".

Enter any applicable comments and click **Next**.



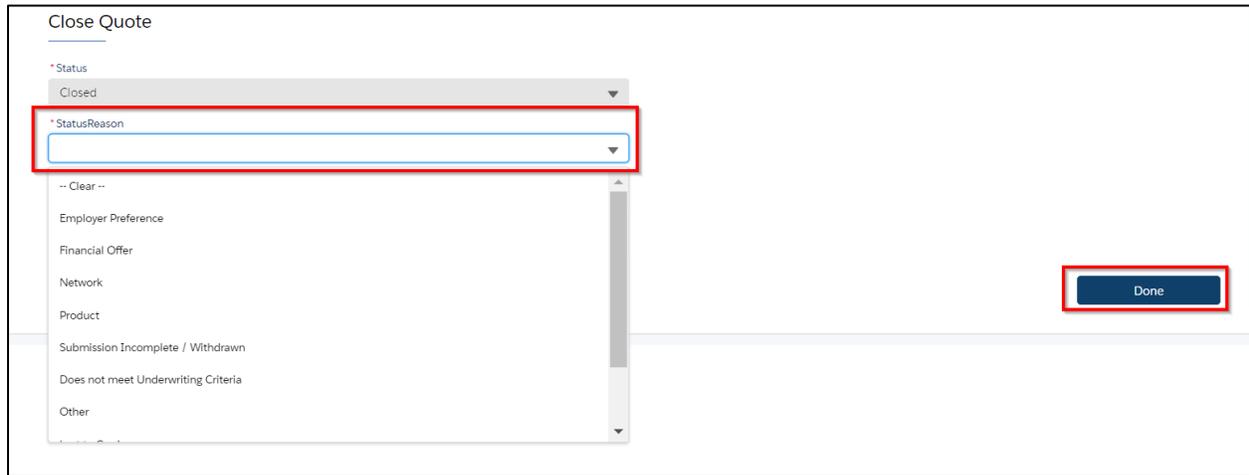
The screenshot shows a "Submit Quote for Review" dialog box. It has a "Comments" field with a red circle '1' next to it. The text in the field is "Please provide new rates. I have a new census." Below the field, there is a "Next" button with a red circle '2' next to it. The dialog also has a "Next" button with a hand cursor icon.

Your Sentara Health Plans Sales Team will be notified, and the quote status will go back to In Review.

Reject a Proposal – Close Quote

Select **Close Quote** to reject a proposal.

Choose a **Status Reason** from the drop down and then click **Done**.



Close Quote

*Status
Closed

*StatusReason

-- Clear --

Employer Preference

Financial Offer

Network

Product

Submission Incomplete / Withdrawn

Does not meet Underwriting Criteria

Other

Done