![Sentara Health Plans logo]

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

Table of Contents

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

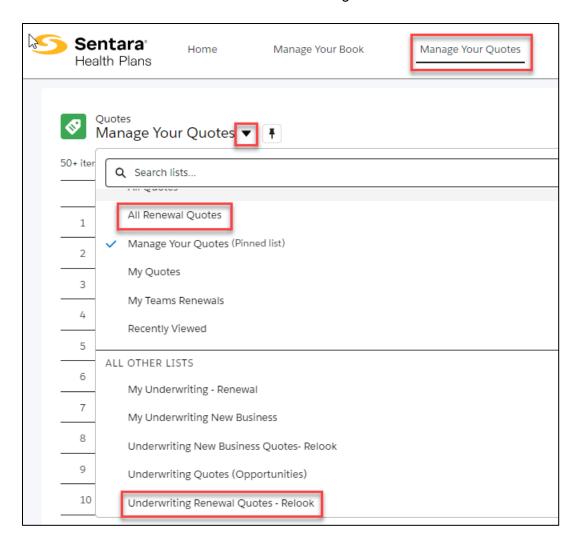- perform quote actions related to mid-market renewals

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
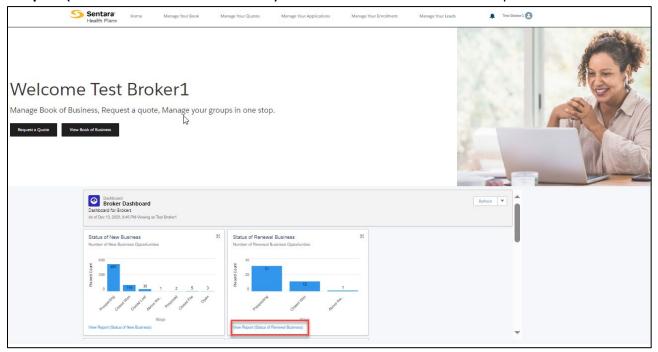3. select All Renewal Quotes or Underwriting Renewal Quotes – Relook list views

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.
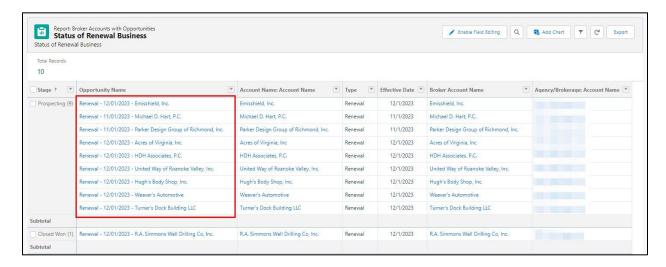
View Report (Status of Renewals Business).

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.
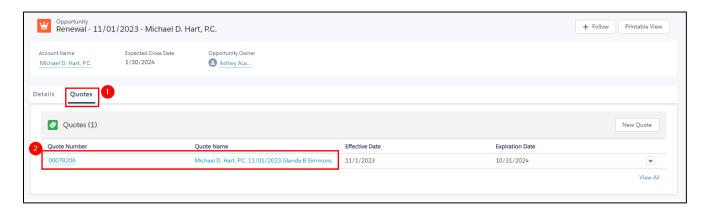

From the "Status of Renewal Business" Report, select the renewal opportunity you'd like to view or work on by clicking the blue hyperlinked font under the **Opportunity Name**.

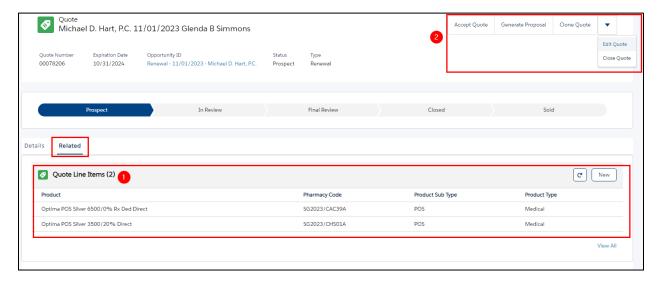Renewal business quotes are accessed from the Opportunity page. To view quotes for renewal business, click:

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

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.

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.
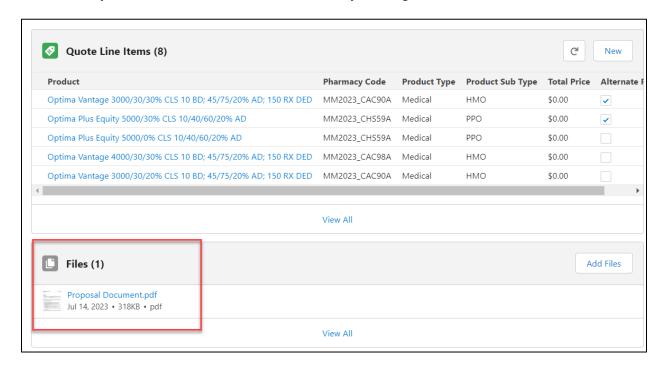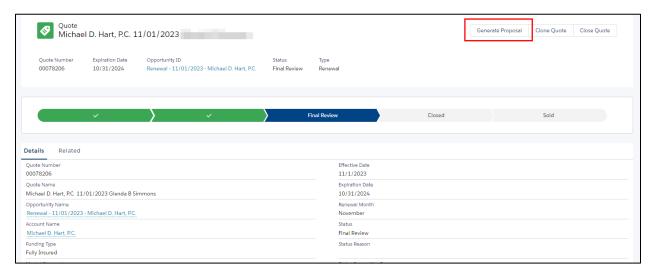
Generate Proposal

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.

If a proposal has not been generated, you can generate a proposal by clicking **Generate a Proposal**.
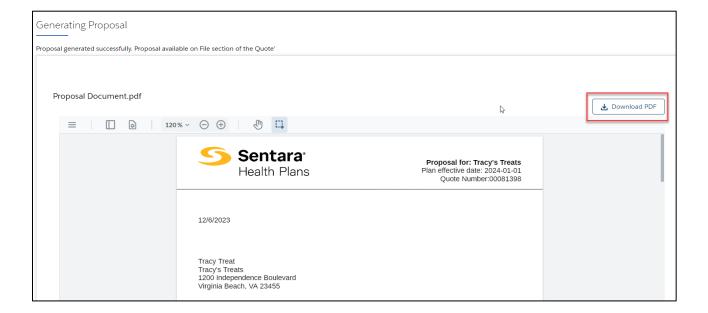
Select a **Rate Type** (age banded or composite) for Small Group and click **Next**.
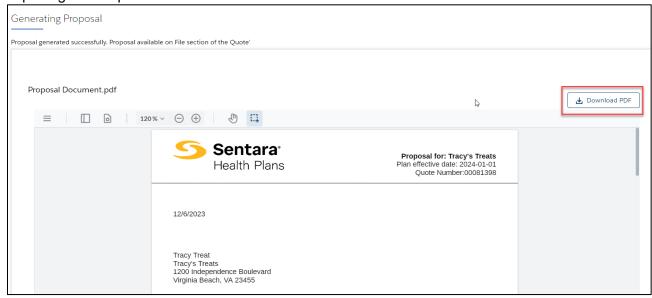

On the next screen a message appears indicating your proposal generated successfully, your proposal document displays. The proposal is also available on the 'File section of the Quote'. You can **download to PDF** from this screen as well.
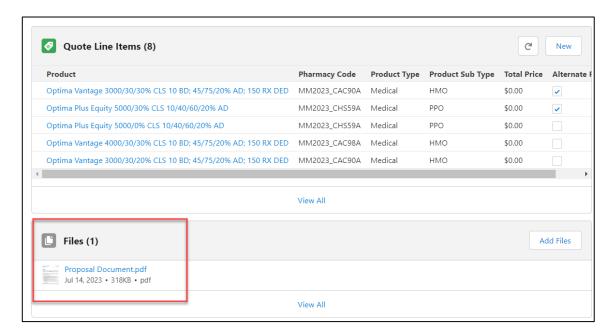
Proposal Preview Issue

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.
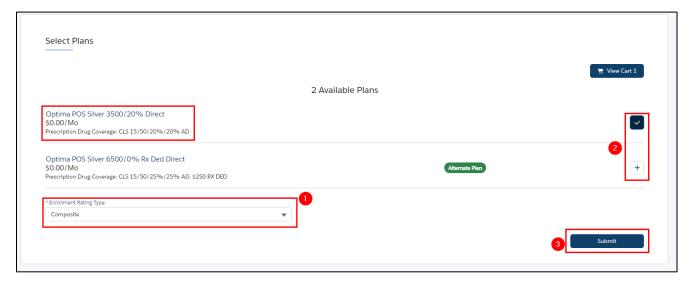
Accept Quote

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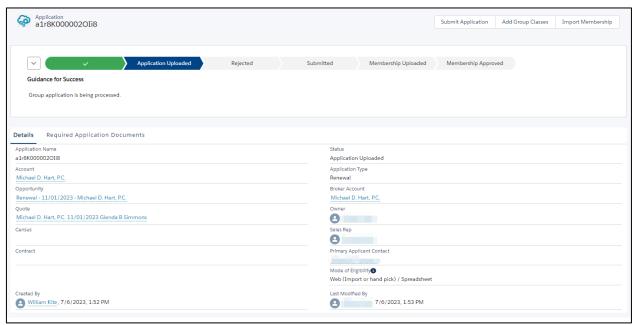
When you click **Accept Quote**, you will have the option to view the cost per month of the plans quoted and all the plans that were presented on the quote.

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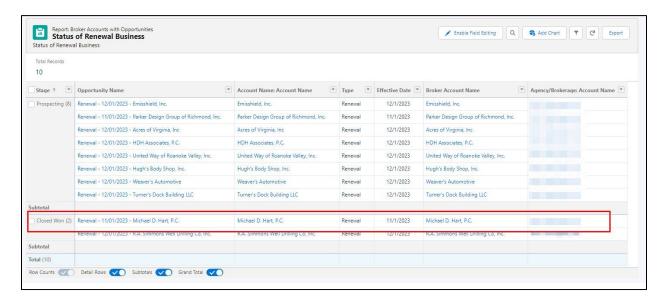
After completing this portion of the process, the renewal will move into the Group Application stage.

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.
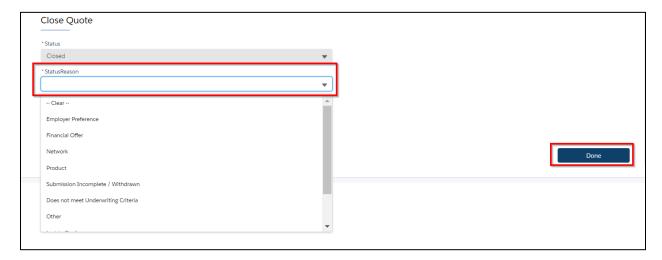
Close a Quote

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

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

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

![Sentara Health Plans logo]

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.

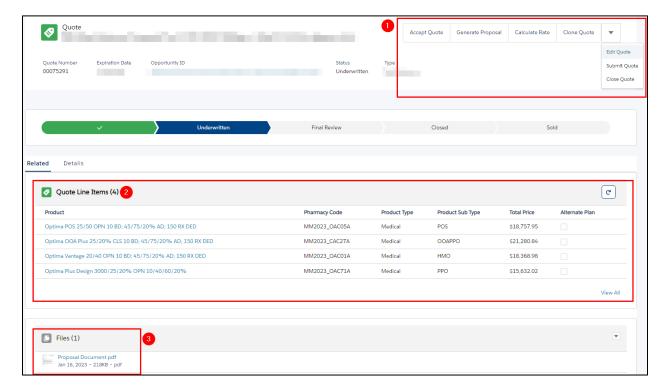Click the bell to view your notifications, and then click the notification to view.

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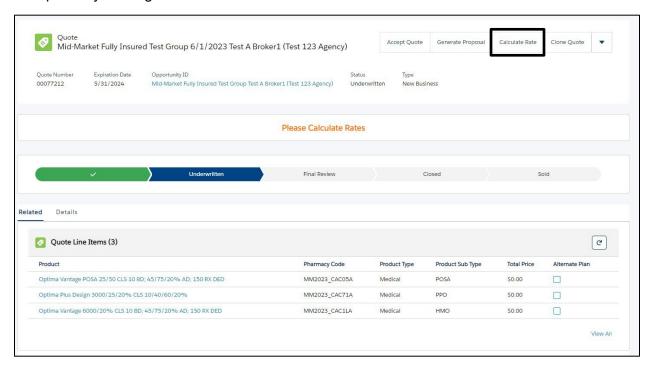
Once the quote is released to you for review, you can:

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.

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**.

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.
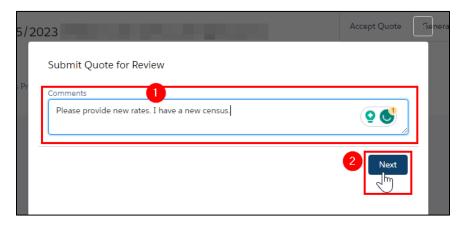
Send Quote for Relook

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**.

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

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**.