Broker User Guide –

Small Group Quotes

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Purpose

The purpose of this user guide is to outline the small group quote process on eBroker. The process includes how to:

- create a new quote
- perform quote actions
- initiate the group application process

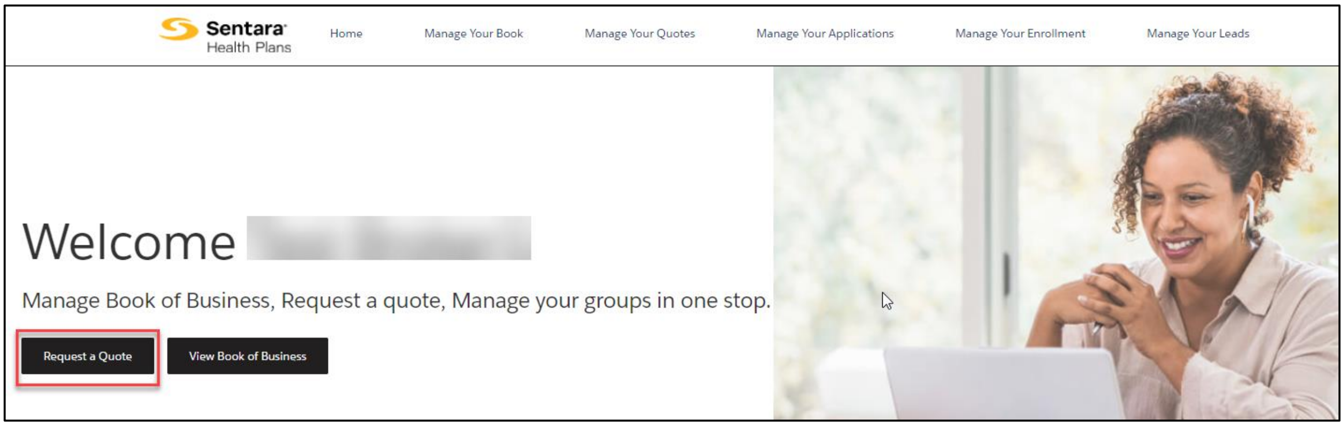
As a reminder, the parameters for group size are as follows:

	Small Group	**Mid-Market Group**	**Large Group**
Funding Type	Fully Insured		
Total # of Employees	≤50	>50	>50
Eligible # of Employees		≤150	≥151
Funding Type	Level Funded		
# of Enrolled Employees	10 - 150		

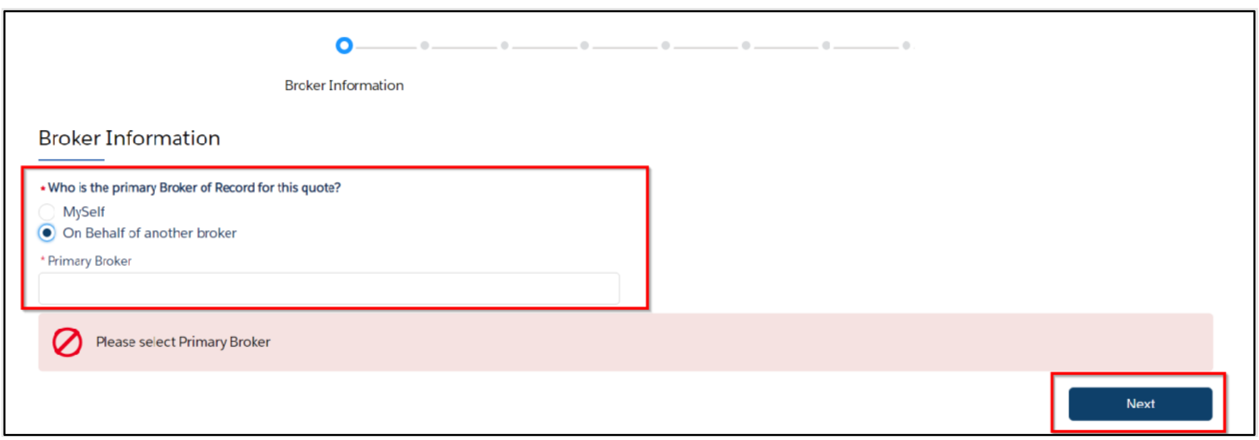
Sentara Health Plans

Create New Quote

Click **Request a Quote** on your home screen.

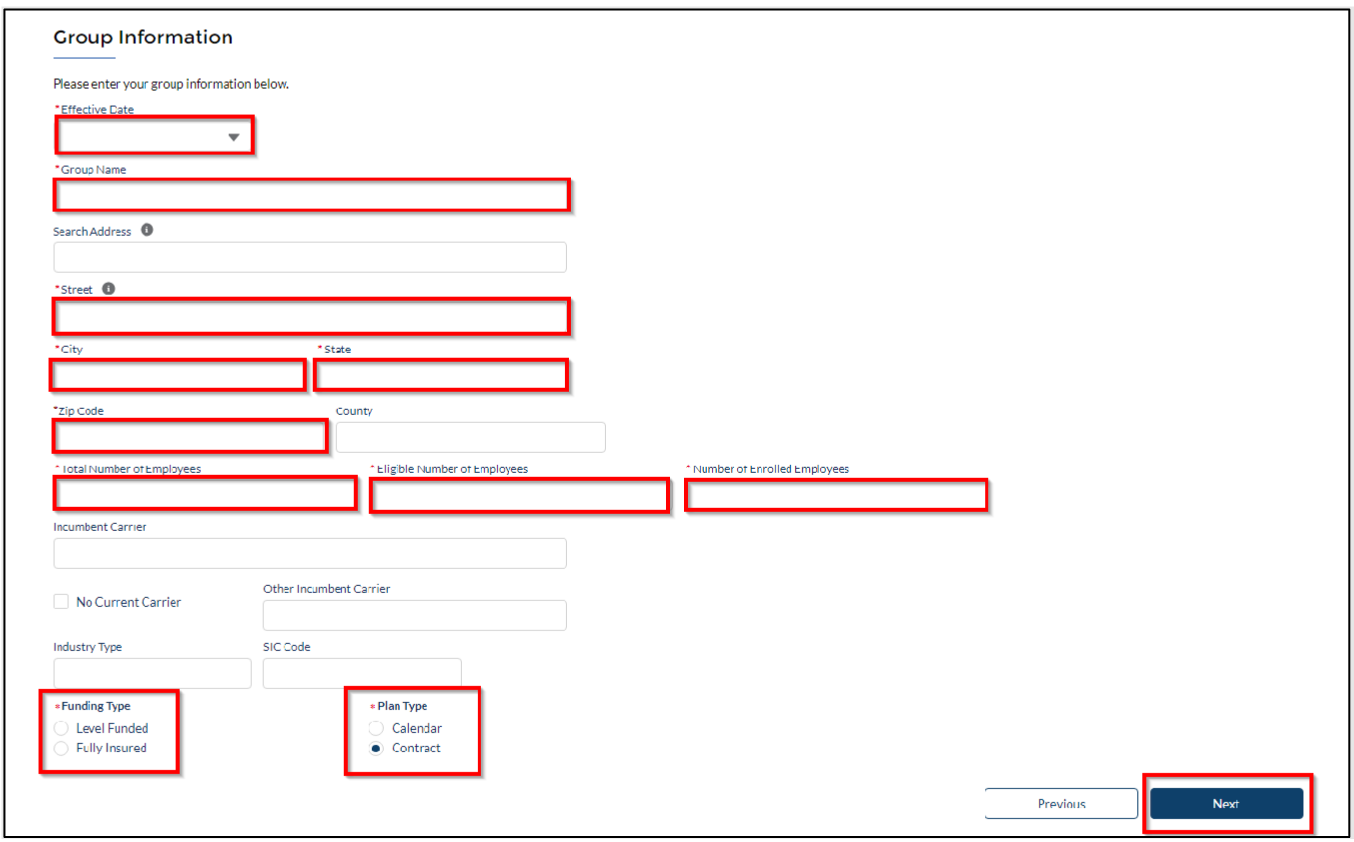


Select the primary broker of record for the quote. You can choose yourself or you can select **On Behalf of another broker**. If you choose another broker, please enter the primary broker name. Once the primary broker is chosen, click **Next**.

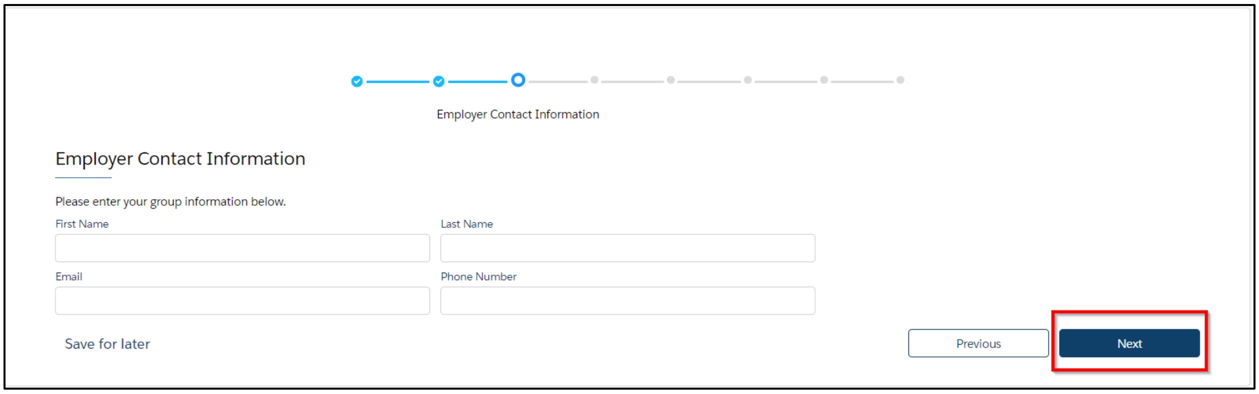


Enter group information on the *Group Information* screen, ensuring the fields outlined in red are filled out. Click **Next** once the following information is filled out:

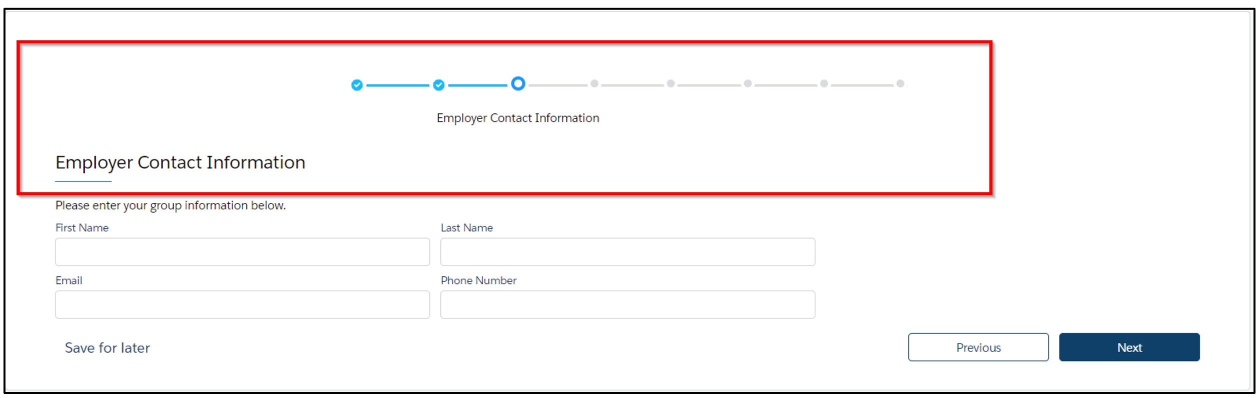
- effective date (dropdown options)
- group name
- street address
- city
- state
- zip code
- total number of employees
- eligible number of employees
- number of enrolled employees
- plan type



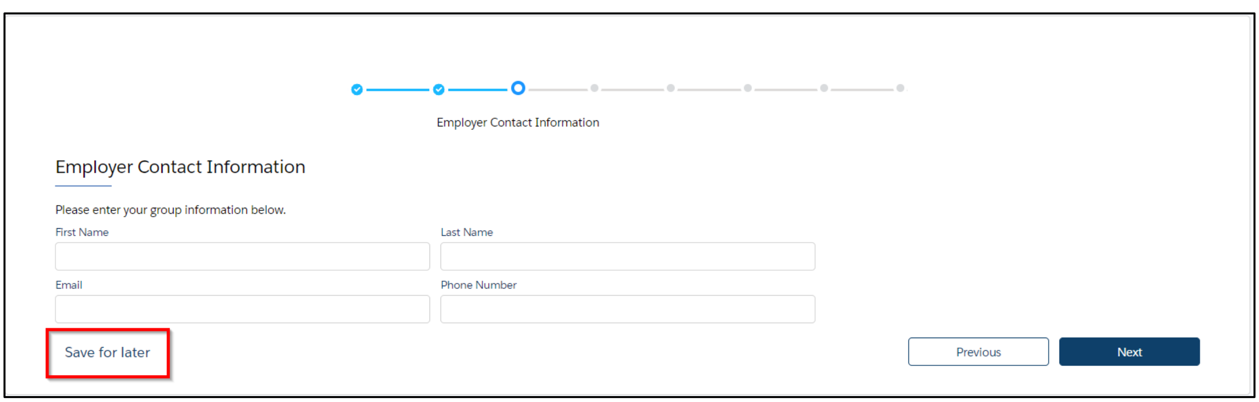
Enter employer contact information and click **Next**.



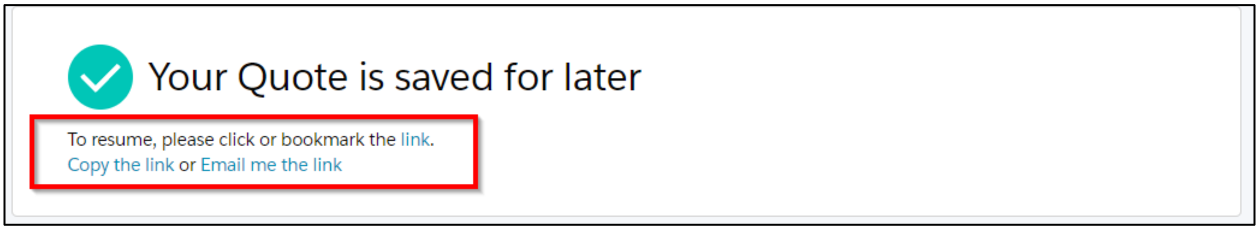
Note: If you ever need to go back to the previous step, click on the check box on the blue line at the top



You can also save for later at any point during the quoting process by clicking **Save for later** located in the bottom left corner. This button is located on each screen (shown below is where the button is on the Employer Contact Information screen)



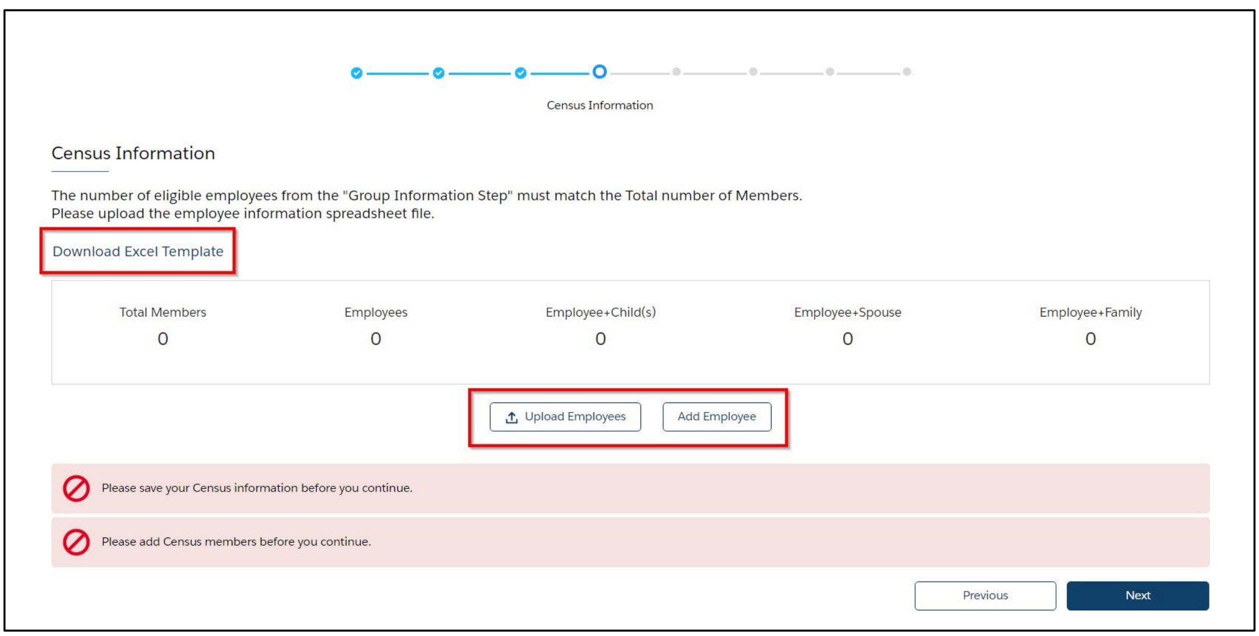
When you click **Save for later**, a pop-up box will display asking **Are you sure you want to save it for later?** You can choose **Cancel** or **Ok**. If you click **Cancel**, you will be brought to the screen where you left off and you can continue your work. If you choose **Ok**, you will come to a new screen that indicates your quote is saved for later. You can resume by clicking or bookmarking the link or you can also copy or email the link.



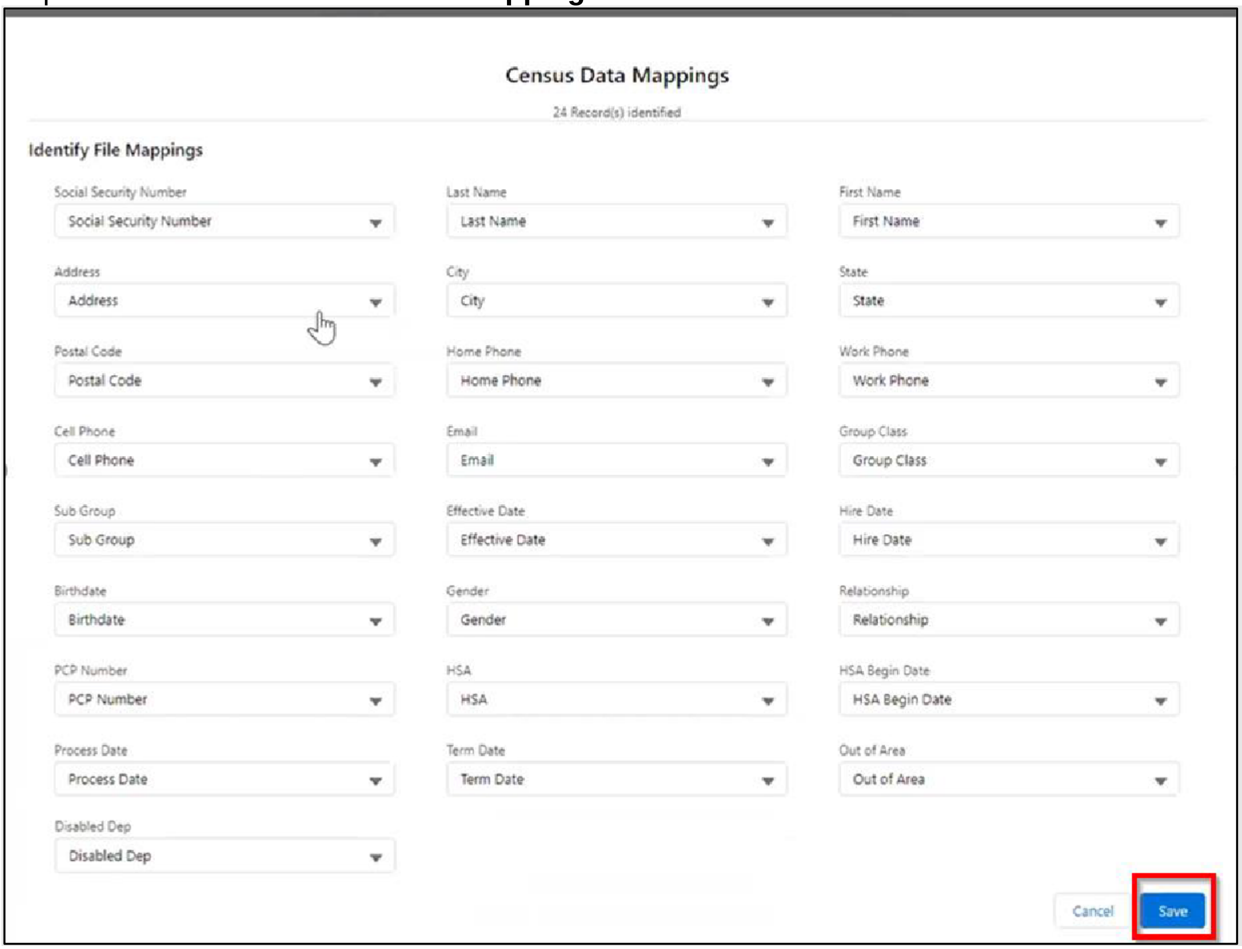
How to Upload a Census

You can upload a census on the **Census Information** screen

Click **Download Excel Template.** An Excel file will download and you can update the census information. Save the Excel file to your computer. Click **Upload Employees**, find the saved census file you want to upload and click **Next** when the field mapping pop up displays.

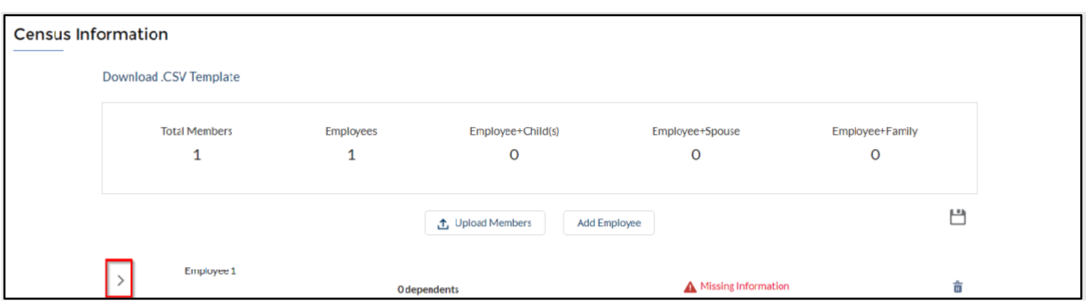


Map the fields on the **Census Data Mappings** screen and click **Save**.

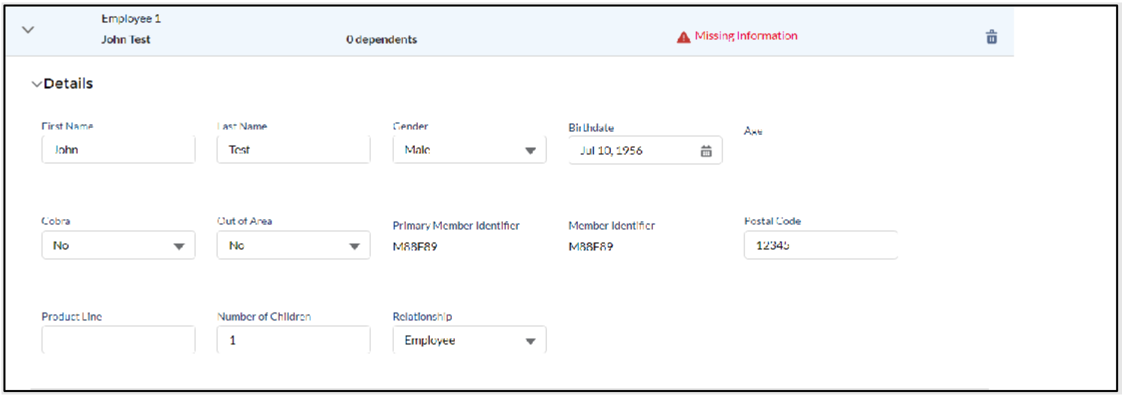


You can also click **Add Employee** to add employee information manually.

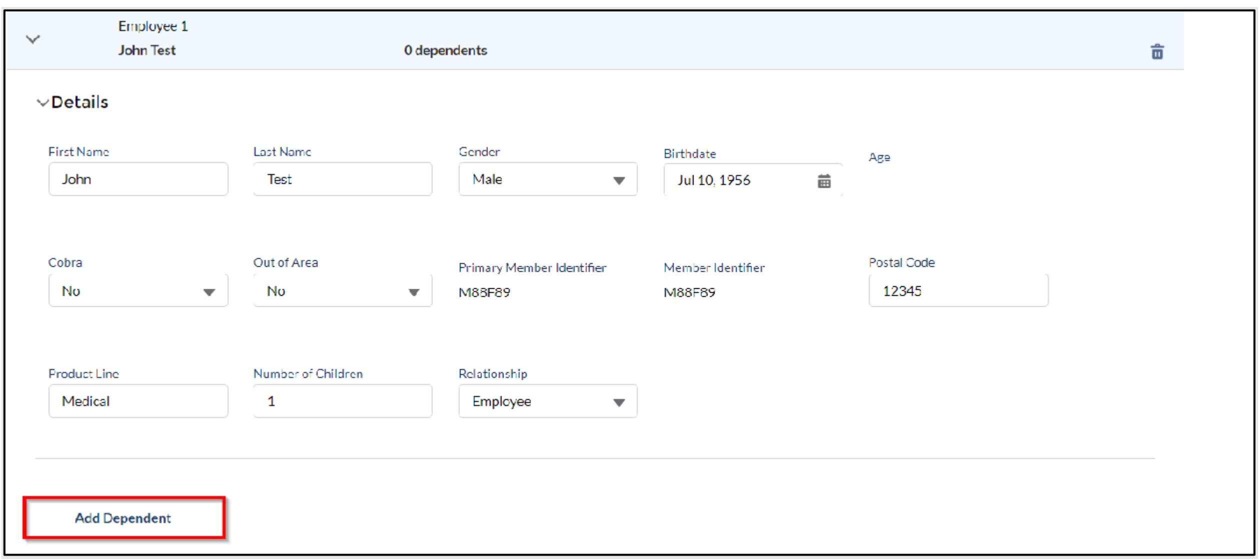
Click the arrow next to **Employee 1** to add the employee information.



Fill out the employee information.



To add a dependent, click **Add Dependent**.



Once you've entered all the information, click **Next.**

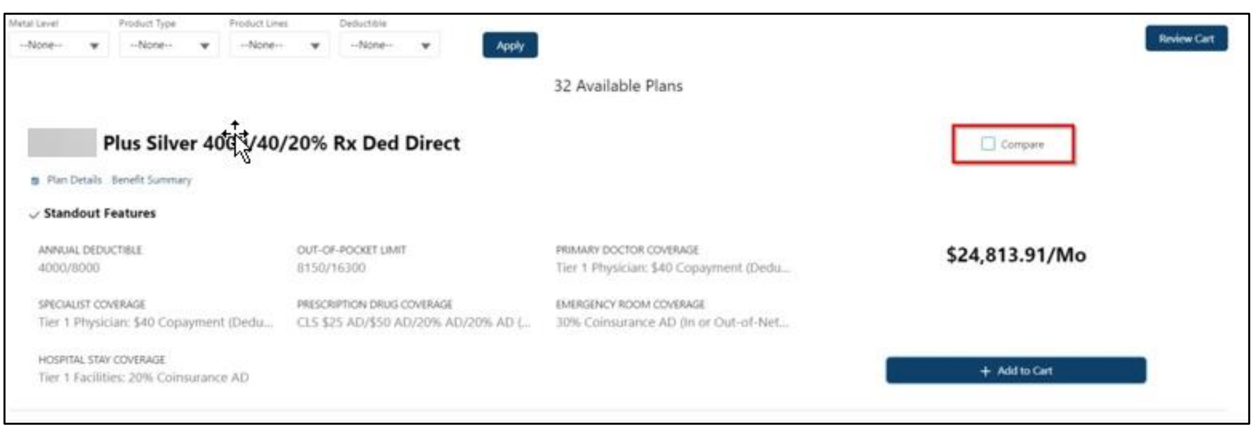
Sentara Health Plans

Plan Selection Features

On the **Plan Selection** page, you will be able to utilize filters to look for relevant plans, compare plans, view the plan details benefit summary, and add plans to the cart. Rates will not display for mid-market groups.

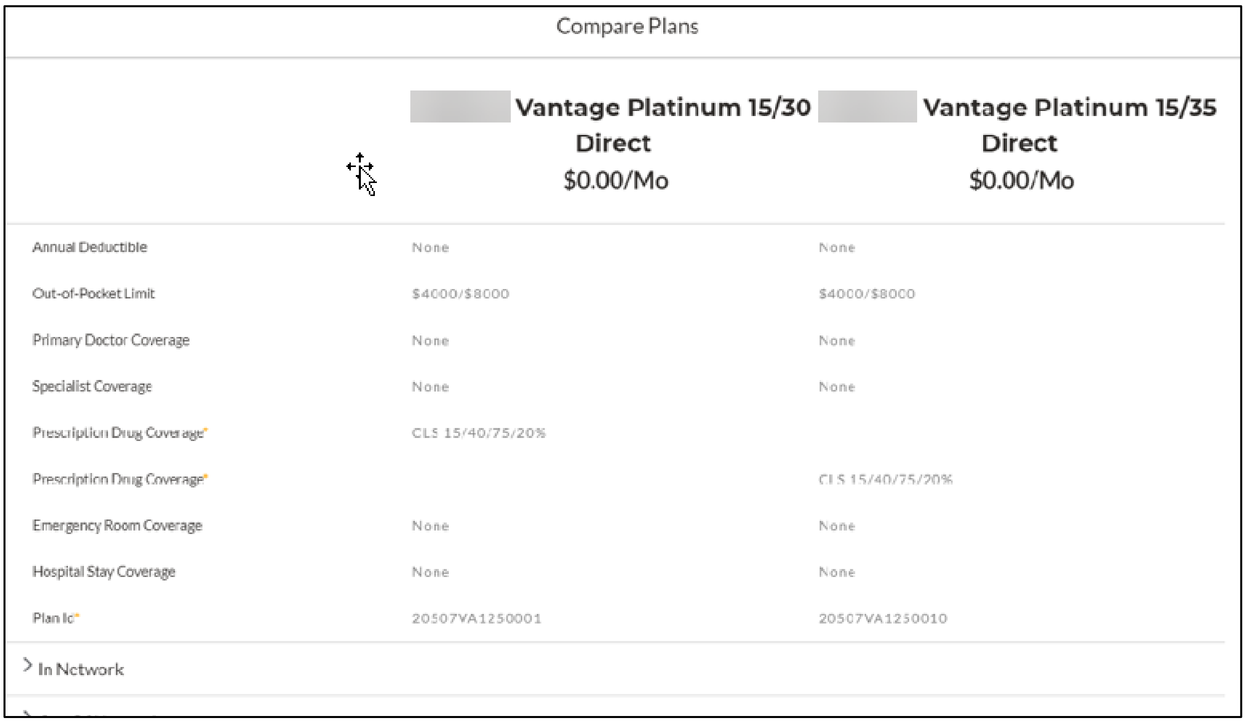
Note: 4 plans per quote is optimal as that is how many plans can be viewed on the side-by-side comparison. Additional plans will go to another page on the proposal and will slow down the time to process the quote.
To filter plans, use the drop-down arrow to choose your filter options from Product Type, Product Lines, and Deductible, then click **Apply**.

To compare plans, click the **Compare check box** of the plan you want to compare.



Once displayed, click **Compare** at the top of the screen, next to Review Cart.

A separate window will display where you can view information for each plan.



To choose a plan, click **Add to Cart**. If you chose the incorrect plan, hover over **Add to Cart** and click **Remove.**

Sentara Health Plans

On the **Plan Selection** screen, click **Review Cart** at the top.

Review Cart

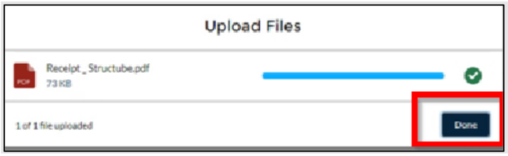
Review your selected plan(s) on the next screen and click **Next.**
To delete a plan from your quote, you can hover over the check mark and click the **X.**

Sentara Health Plans

Document Upload

To upload documentation for the quote, click **Upload Files** on the next screen and then click **Next**.

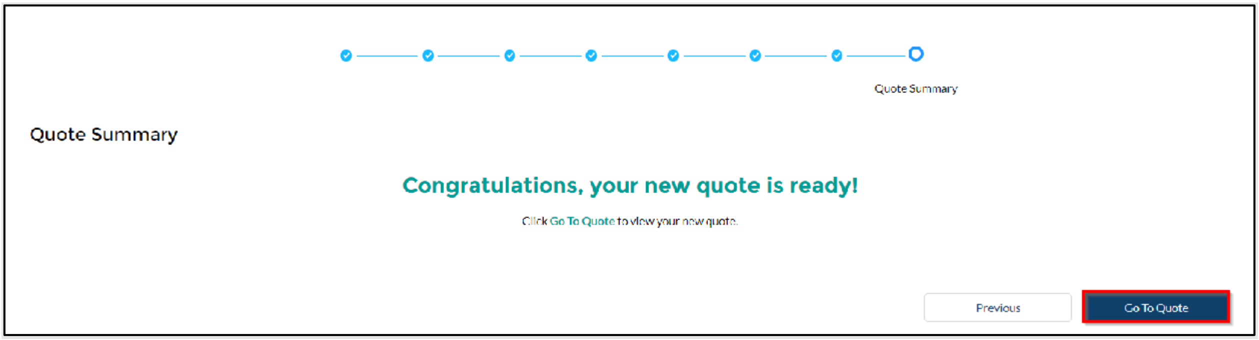
Note: This section is not mandatory. You can continue without uploading any files at this time. Just click **Next**.



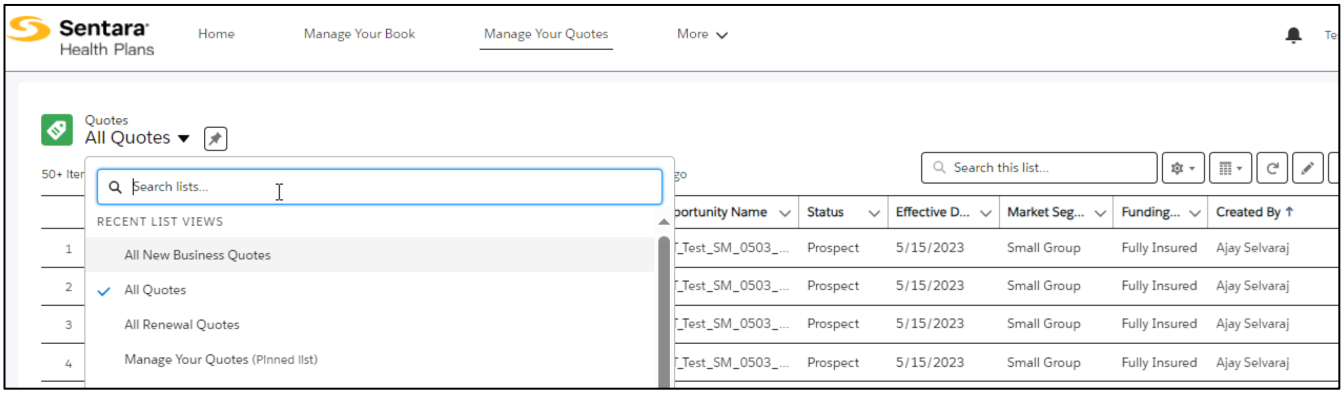
Once documentation has been uploaded, click **Done**.

Congratulations, your new quote is ready!

Click **Go To Quote** on the next screen to view selected quote information.



You will then be able to see the created quote, as well as underwritten quotes, by selecting the different list views on your **Quote Detail** screen.



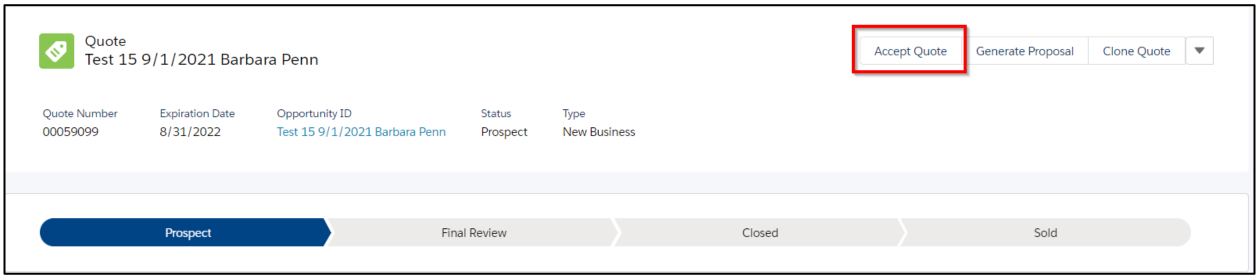
Quote Actions

From the **Quote Detail** screen, you can do the following actions:

- accept a quote
- generate a proposal
- edit a quote
- close a quote
- clone a quote

Accepting a Quote

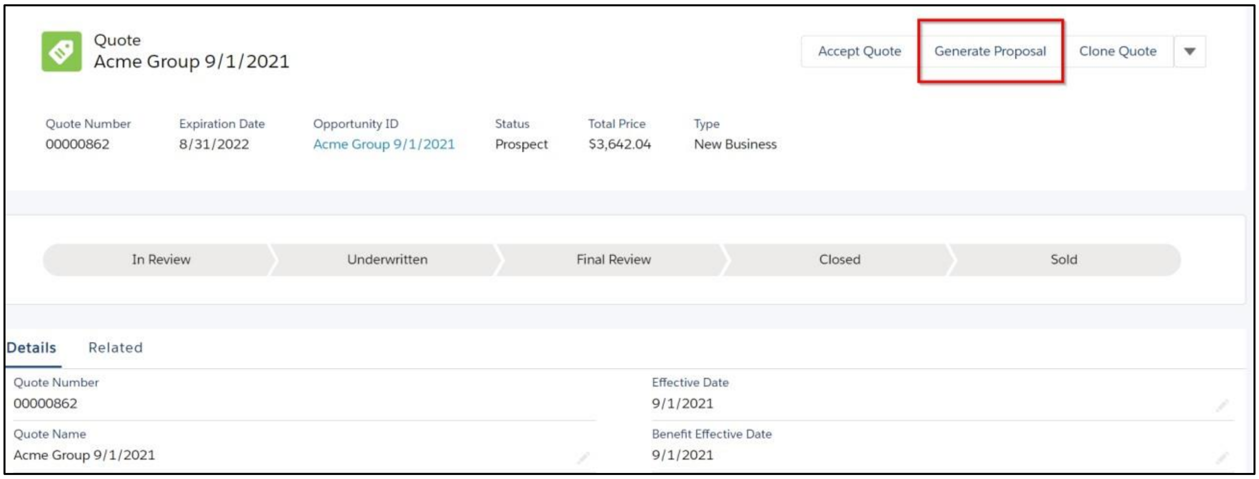
To accept a small group fully insured quote, click **Accept Quote**.



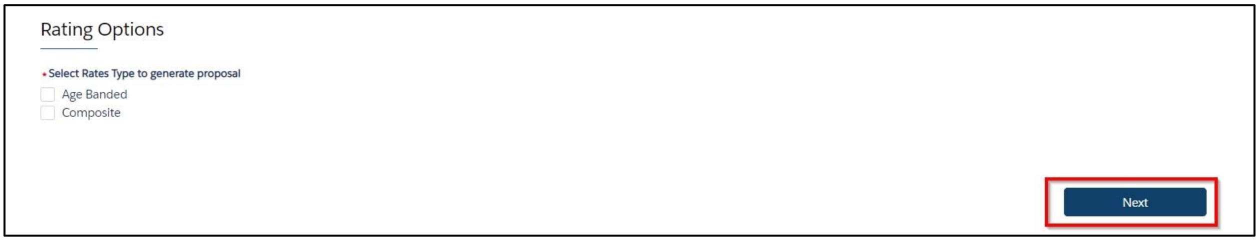
Click on the + button to add the selected plan on the **Select Plans** screen and choose an **Enrollment Type**. Once selected, click **Submit**.

Generate a Proposal

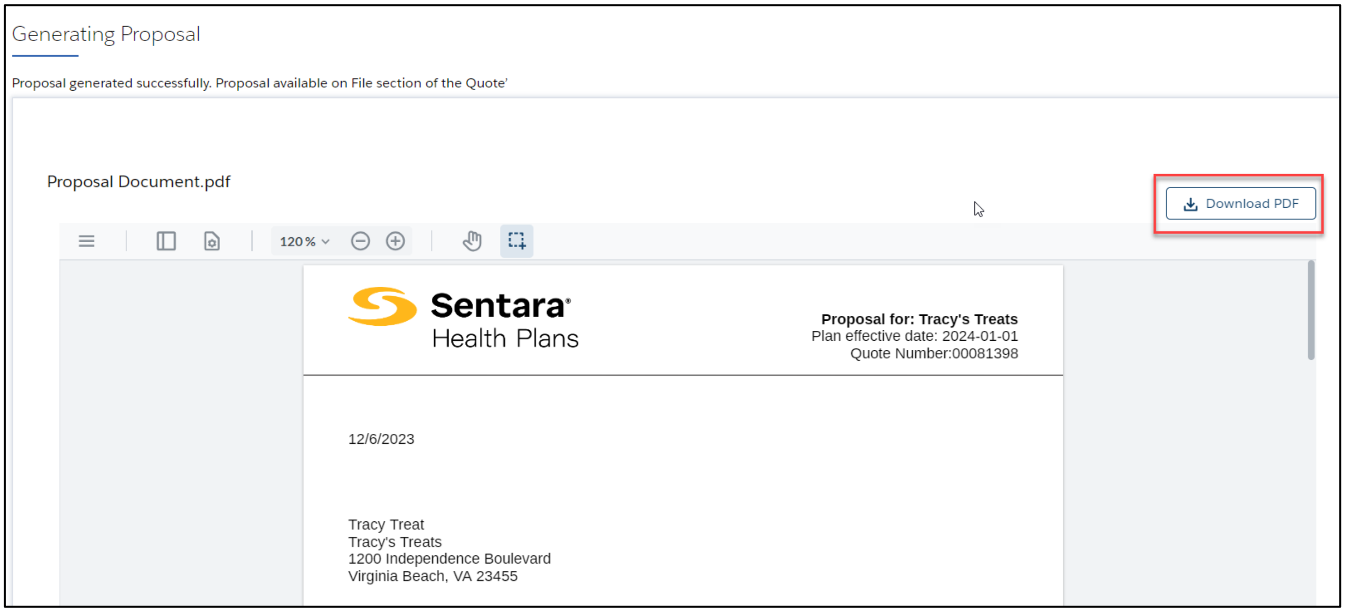
You can generate a proposal by clicking **Generate a Proposal**.



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



On the next screen a message appears indicating your proposal generated successfully, your proposal document will be displayed and the proposal is also available on the ‘File section of the Quote’. You can **download to PDF** from this screen as well.

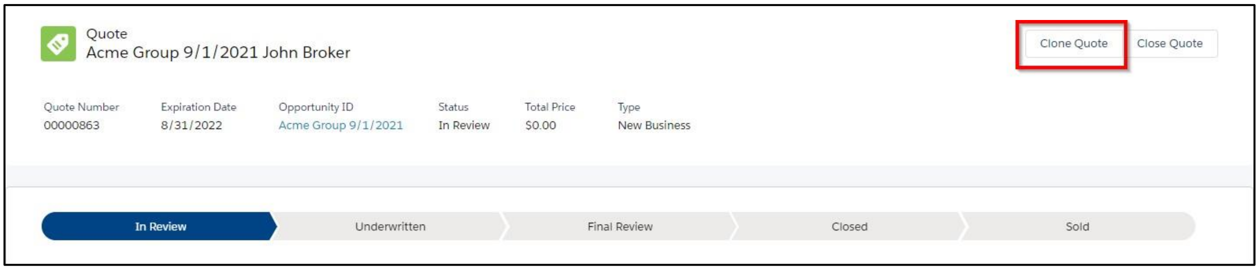


Cloning a Quote

Cloning 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 and funding types. Cloning will keep all of the quotes grouped together under one opportunity.

A quote can be cloned from any status by clicking **Clone Quote**. You need to enter the effective date and 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 is 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**.



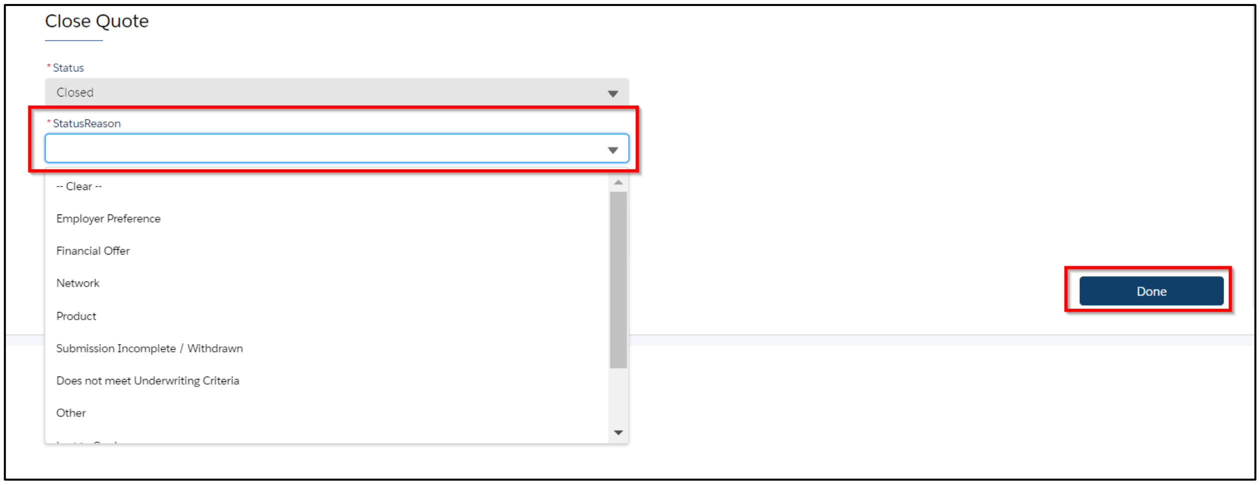
Edit a Quote

The purpose of editing a quote is to change plans on the quote. Changes cannot be made to the quote that will impact the rates.

Closing a Quote

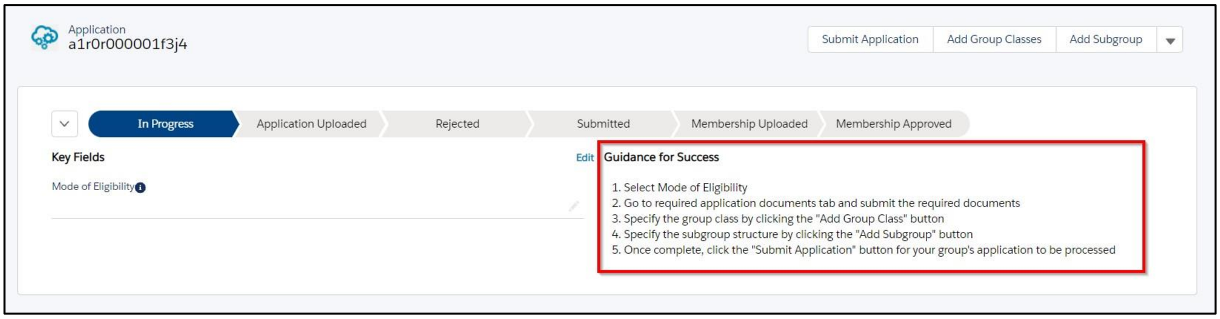
You can close a quote by clicking **Close Quote**.

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



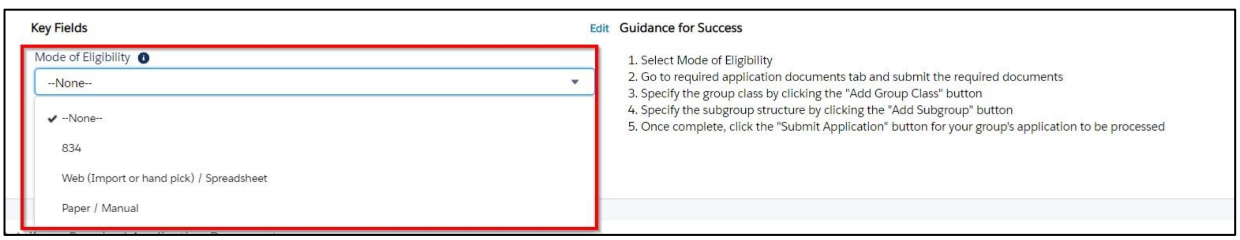
Group Application Process

Once the quote has been accepted, the application screen displays as well as the **Guidance for Success**.

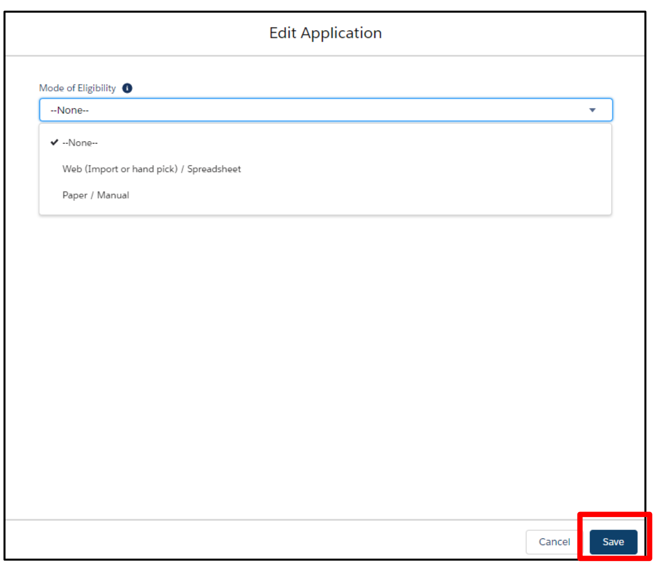


Mode of Eligibility

Select **Mode of Eligibility**.

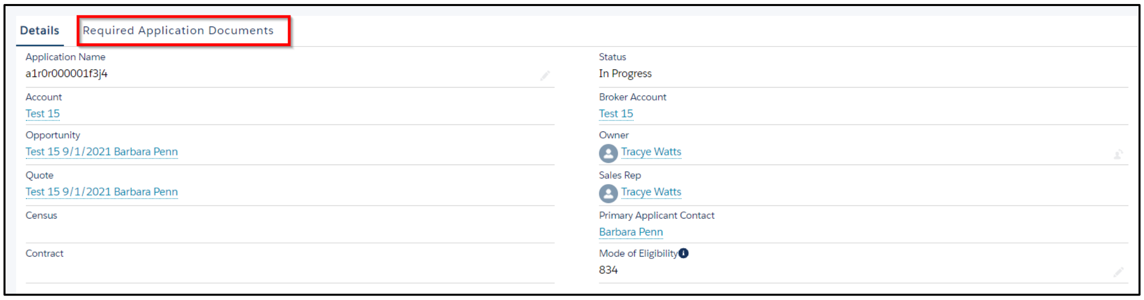


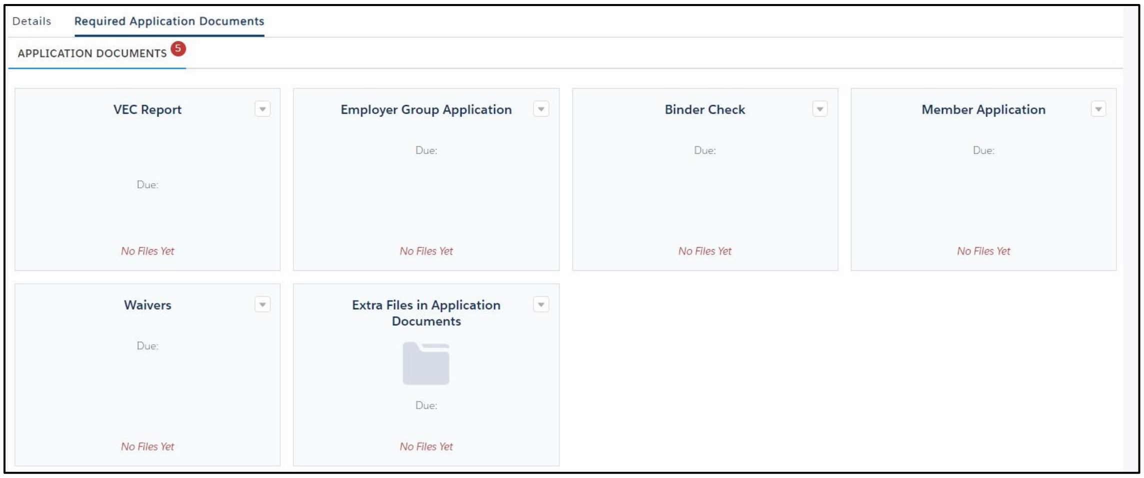
Select **Web (Import or hand pick) / Spreadsheet** or **Paper / Manual**, then click **Save**.



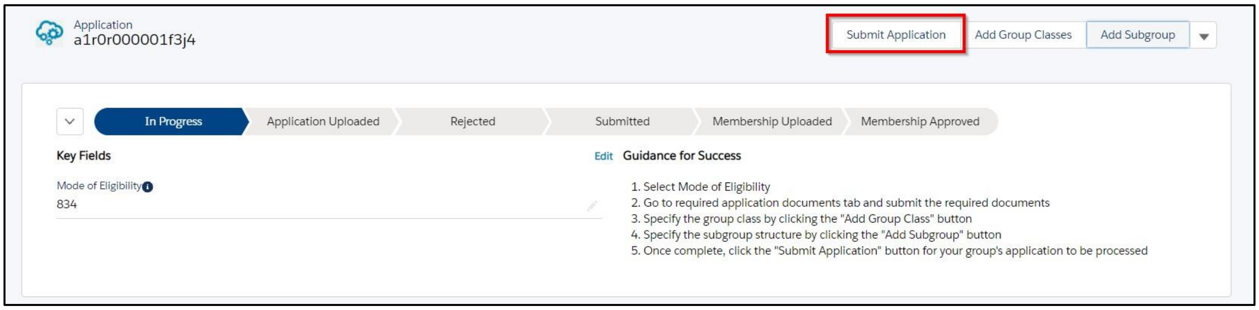
Required Application Documents

Go to **Required Application Documents** tab and submit the required documents.





Once the steps are completed, click **Submit Application**

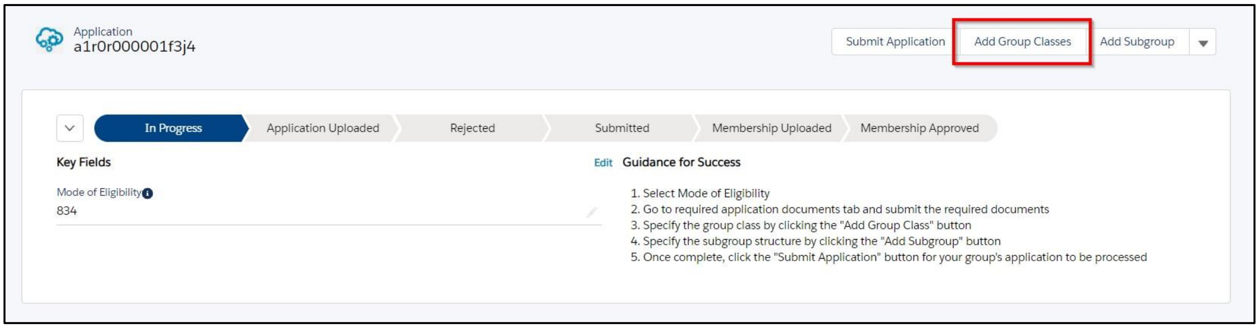


A message displays indicating your application was submitted and the Sentara Health Plans Sales Team will be notified.

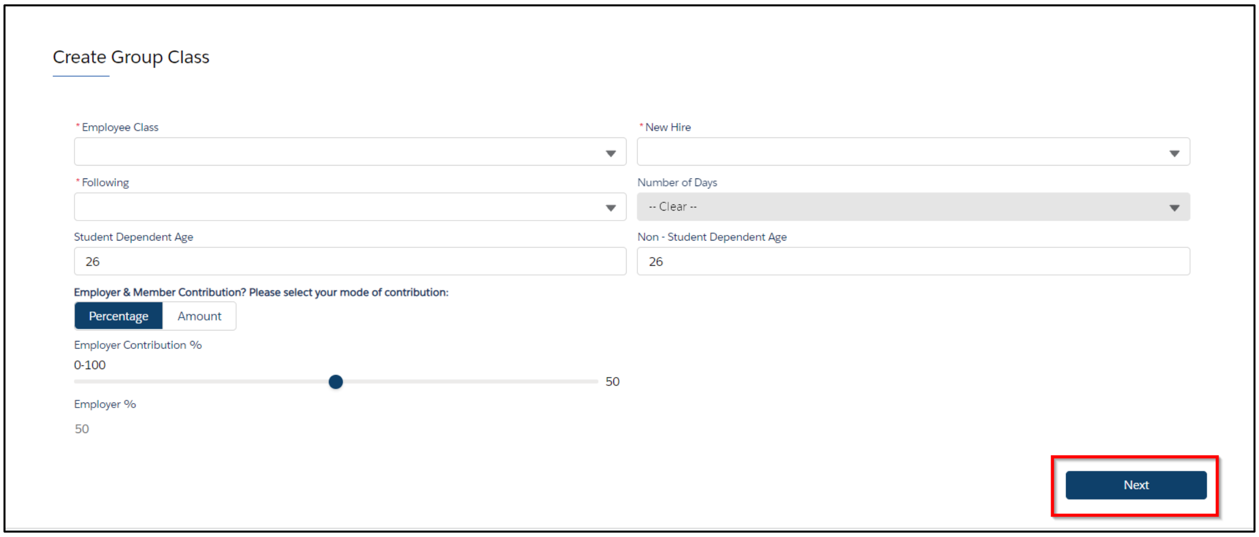
Add Group Class

Prior to submitting your application, you can add a group class, however it is not required to submit the application, your Sentara Health Plans Sales Team can complete this step on your behalf.

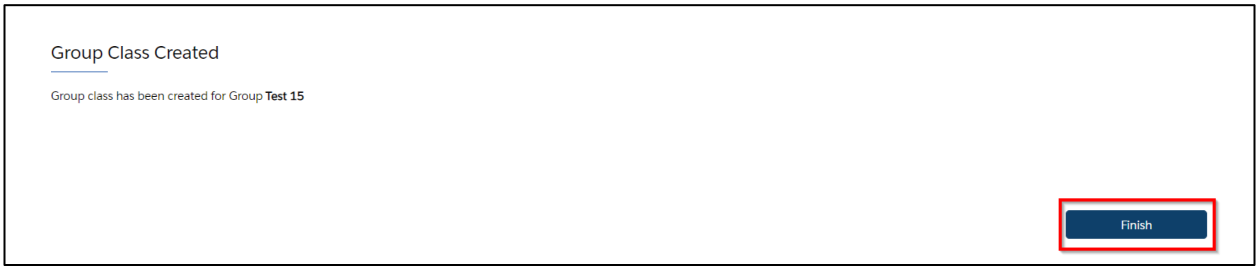
Specify the group class by clicking **Add Group Class**



Fill out the Group Class Information and click **Next**

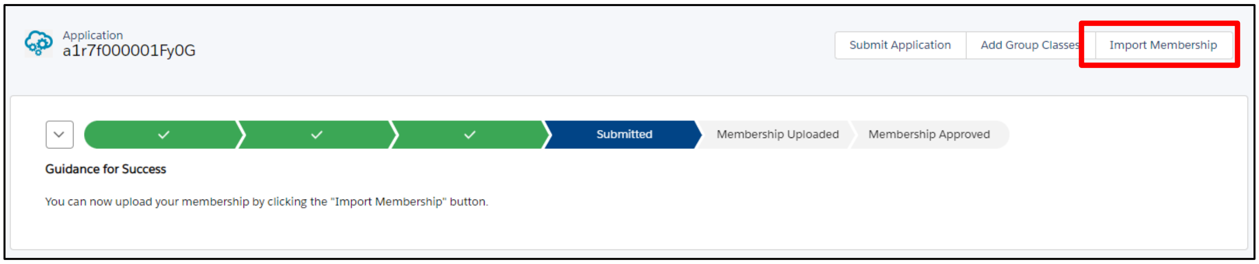


A message displays indicating the group class has been created. Click **Finish**.

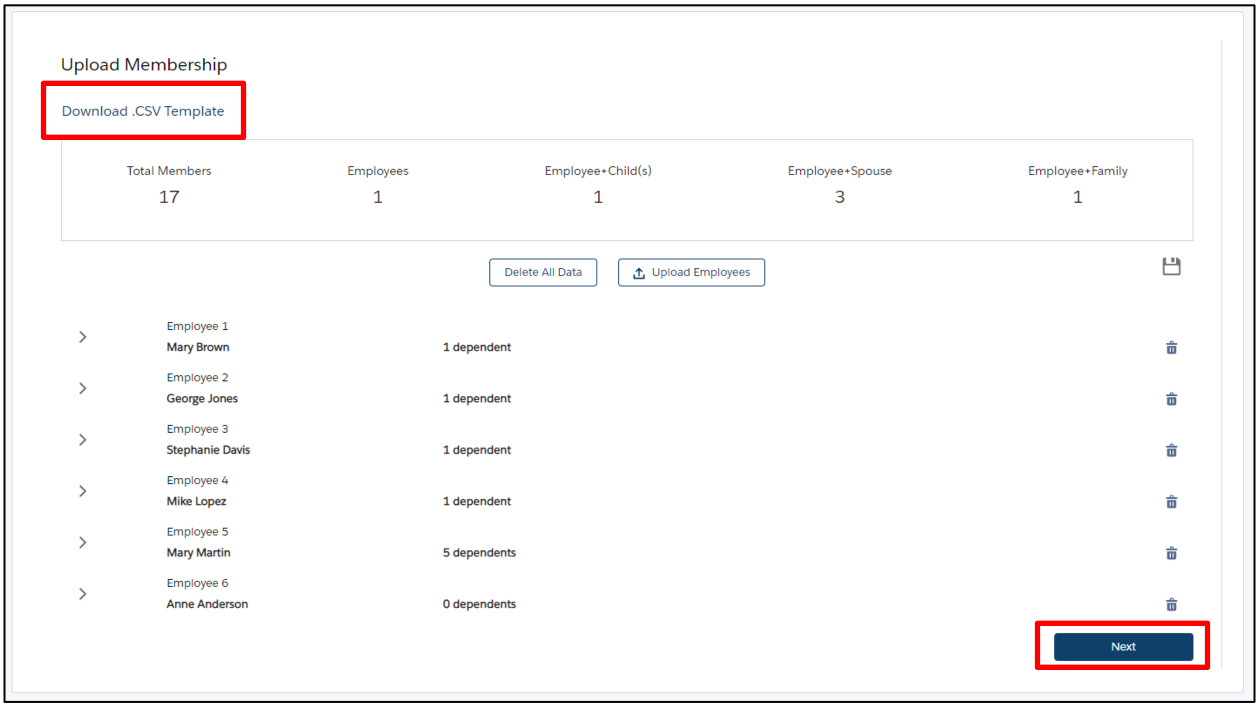


Import Membership

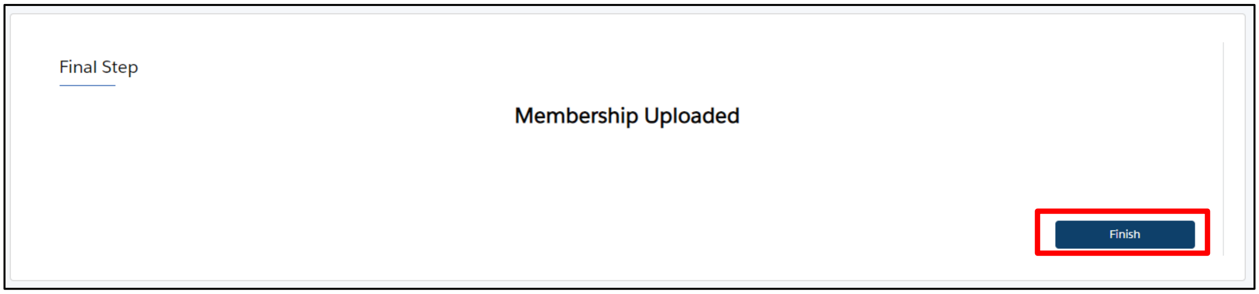
Once your group application is in the submitted stage, you can import membership by clicking **Import Membership or** if you provided your group's member application or enrollment spreadsheet in your Required Documents, then your **Sentara Health Plans Sales team can import your membership on your behalf.**



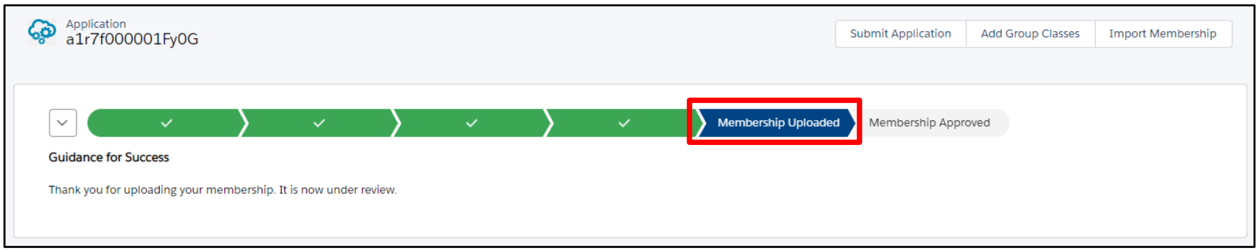
You can download the enrollment spreadsheet by clicking the Download .CSV Template and clicking **Upload Employees**, and click **Next**.



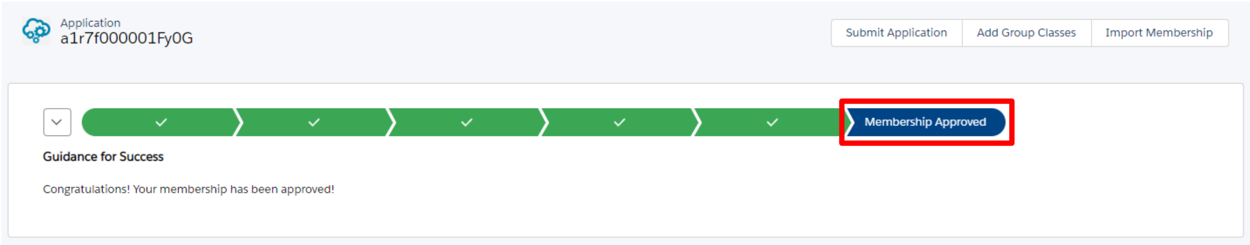
The final step to import membership is to click **Finish**.



The status of your group application updates to **Membership Uploaded**.



Your Sentara Health Plans Sales team will be notified and once your membership has been reviewed and approved your application status updates to **Membership Approved**.



Congratulations you've completed your group's member enrollment!