

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	<u><</u> 50	>50	>50			
Eligible # of Employees		<u><</u> 150	<u>≥</u> 151			
Funding Type	Level Funded					
# of Enrolled Employees		10 - 150				



Create New Quote

Click the **Request a Quote** button on the home screen.



Broker Information

Select the primary broker of record for the quote.

If you are completing the quote for yourself, select the **Myself** button.

	Broker Information	
Broker Information Who is the primary Broker of Record for this MySelf On Behalf of another broker	quote?	
		Next



If you are completing the quote **On Behalf of another broker**, select the **On Behalf of another broker** button. In the Primary Broker Field, type the name of the broker and then select the displayed name from the list.

	-	
	Broker Information	
Broker Information		
Who is the primary Broker of Record for	his quote?	
*Who is the primary Broker of Record for MySelf	his quote?	
Who is the primary Broker of Record for MySelf On Behalf of another broker	his quote?	
Who is the primary Broker of Record for MySelf On Behalf of another broker 'Primary Broker	his quote?	
Who is the primary Broker of Record for MySelf On Behalf of another broker 'Primary Broker test	his quote?	
Who is the primary Broker of Record for MySelf On Behalf of another broker 'Primary Broker test Test X Broker	his quote?	
Who is the primary Broker of Record for MySelf On Behalf of another broker 'Primary Broker test Test X Broker Test A -REMOVE AFTER Broker1	his quote?	

Once the primary broker is chosen, click **Next**.

Navigation - Quote Status Bar and Save for Later

Status Bar

While completing the Request a Quote process, if you need to navigate to the previous screen, click on the previous section of the quote status bar.

	o	•••••	• • •	
		Employer Contact Information		
Employer Contact Informat	ion			
First Name	Ι.	Last Name		
Email		Phone Number		

Save for Later

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)



	<u>o</u>	••••••	••		
		Employer Contact Information			
Employer Contact Infor	mation				
Please enter your group information First Name	below.	Last Name			
Email		Phone Number			
Save for later				Previous	Next

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.

Your Quote is saved	l for later	
To resume, please click or bookmark the link. Copy the link or Email me the link		

Group Information

Enter group information on the Group Information screen, ensuring the required fields are completed. Required fields are noted with an asterisk (*).

- *Effective Date
- *Group Name
- Trade Name not required
- Search Address type the address and select from the menu options.

800 Indiana Street, San Francisco, CA, USA 800 Independence Avenue Southwest, Washington, DC, USA 800 Independence Boulevard, Virginia Beach, VA, USA	
800 Independence Avenue Southwest, Washington, DC, USA 800 Independence Boulevard, Virginia Beach, VA, USA	
800 Independence Boulevard, Virginia Beach, VA, USA	
	վա
Avenida Insurgentes Sur 800, Colonia del Valle Centro, Mexico	City, CDMX, Mexico
800 Industrial Drive, Denison, IA, USA	

- Note If the search address is utilized, it will automatically populate the Street, City and State fields listed below.
- Street
- City
- State

Revised 03/28/2025



- Zip Code
- County if a county is associated with the Zip Code, it needs to be selected
- Total Number of Employees
- Eligible Number of Employees
- Number of Enrolled Employees
- Incumbent Carrier type the name of the group's Incumbent Carrier if it exists
- Carrier Id not required
- No Current Carrier check this box if there is no current carrier, or if the incumbent carrier is unknown
- Other Incumbent Carrier not required
- Funding Type
- Plan Type

*Industry Type and SIC Code are not required

	•	o0		 · •			
		Group Inform	ation				
Group Information							
Please enter your group inforn	nation below.						
* Effective Date	-						
* Group Name	·						
Goup Hume							
Trade Name							
Search Address 🕚							
Street 🚺]				
City	State]				
*Zin Codo	Countr						
Zip Code	County						
0							
Zipcode is not valid							
Zipcode is not valid *Total Number of Employees	····	Eligible Number of I	mployees	 * Number of Enrolled E	mployees		
Zipcode is not valid * Total Number of Employees	** 	Eligible Number of I	mployees	* Number of Enrolled E	mployees		
Zipcode is not valid Total Number of Employees	, re	Eligible Number of I	mployees	*Number of Enrolled E	mployees		
* Total Number of Employees	**	Eligible Number of I	mplayees	*Number of Enrolled E	mployees		
Zipcode is not valid Total Number of Employees incumbent Carrier Carrier Id	** 	Eligible Number of I	mployees	*Number of Enrolled E	mployees		
Zipcode is not valid *Total Number of Employees Incumbent Carrier Carrier Id	· · E	Eligible Number of I	imployees	* Number of Enrolled E	mployees		
Zipcode is not valid Total Number of Employees Carrier Carrier Id No Current Carrier	Other Incumbent Car	Eligible Number of I	imployees	* Number of Enrolled E	mployees		
Zipcode is not valid Total Number of Employees Incumbent Carrier Carrier Id No Current Carrier Industry Type	Other Incumbent Can	Eligible Number of I	mployees	* Number of Enrolled E	mployees		
Zipcode is not valid Total Number of Employees Incumbent Carrier Carrier Id No Current Carrier industry Type	Other Incumbent Carr	Eligible Number of I	mployees	* Number of Enrolled E	mployees		
	Other Incumbent Carr	Eligible Number of I rier Plan Type) Calendar	imployees	* Number of Enrolled E	mployees		
	Other Incumbent Carr	Eligible Number of I rier Plan Type Calendar Contract	imployees	* Number of Enrolled E	mployees		
	Other Incumbent Can	Eligible Number of I rier Plan Type) Calendar) Contract	mployees	* Number of Enrolled E	mployees		
Zipcode is not valid Total Number of Employees Incumbent Carrier Carrier Id No Current Carrier Industry Type Level Funded Fully Insured	Other Incumbent Can	Eligible Number of I rier Plan Type) Calendar) Contract	mployees	* Number of Enrolled E	mployees		



Click **Next** once the group information is completed.

Employer Contact

Enter employer contact information and click **Next**. This information is not required and can be updated in the Account Contacts section at a later time.

Note: The contact information provided on this page is populated on the quote proposal document.

	o o	-0	 	
	Employer C	ontact Information		
Employer Contact Informatio	n			
Please enter your group information below.				
First Name	Last Name			
Email	Phone Num	iber		
Email	Phone Num	iber		

Census

The Smart Census upload feature leverages an AI model that understands the various census file formats and structures utilized by health carriers and brokerage houses for employer census documentation. When the census is uploaded, the AI model applies data standardization rules, offering greater flexibility for how the data can be entered.

Census Template

To download a Census Template, select the **Download Excel Template** button and save the document to a location on your computer.

	so	Census Information							
Census Information The number of eligible employees from the Please upload the employee information sp Download Excel Template	"Group Information Step" must match the readsheet file.	Total number of Members.							
Total Members 0	Total Emp O	Emp O	Emp+child(s) 0	Emp+Spouse 0	Emp+Family 0				
	Smart Censor Upload Add Employee								
Please save your Census information before	you continue.								
Please add Census members before you con	tinue.								
Save for later				Previous	Next				

Revised 03/28/2025



Completing the Census

Listed below are the data elements expected to be seen in the census files. The Smart Census solution does not enforce rules around these fields. For example,

- **Date values** Accepted in MM/DD/YYYY or MM/DD/YY format.
- **Zip codes** Numeric values are accepted and must be 5 digits.
- **Gender** Is NOT case sensitive. M/F or Male/Female/Unknown are acceptable values.
- **Primary Member Identifier and Member Identifier** The Primary Member Identifier and the Member Identifier are NOT required.
- **Relationship** The Relationship field indicates family groupings.
- TRUE/FALSE and YES/NO Treated the same. Either option can be entered.

Census information for a Small Group Quote:

- First Name
- Last Name
- Gender Is NOT case sensitive. M/F or Male/Female/Unknown are acceptable values.
- Birthdate Accepted in MM/DD/YYYY or MM/DD/YY format.
- Cobra Yes or No
- Out of Area– Yes or No
- Primary Member Identifier Not required
- Member Identifier Not required
- Postal Code 5-digit zip code
- Relationship Indicates Family Groupings Employee/Spouse/Child
 - Each family grouping starts with the **Employee** listed first, with each family member to follow. The next Employee entry in the spreadsheet indicates the start of a new family grouping. The Employee must be listed first for each family grouping.

Upload Census File

To upload a completed Census Spreadsheet, click **Smart Census Upload.** Select the census file from its saved location on your computer. Click on the file name, and then select **Open.**



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 This PC + Downloads + Census New folder New folder New folder Sample Census Templete.alse 7/26/20214/36.8.04 Microsoft ExectVii 1948 Select a file 	
 This PC + Develoads + Census New Koller Name Date modified Type: Size Sample Census Templeticalitie 7/26/2021-458 AM Microsoft Excel W 1910 Select a file 	_
New folder Name Outs modified Type Sce Scre Sargie Cenus Templeticate 7/26/2021-456.00 Microsoft Scent W 19.00 Select a file	enna
Name Obtermodified Type Size Sample Census Template.alse 77/24/20271-8-56 AAA Microsoft Excel W 19 10 Select a file	10 × 1
0 Sample Census Tampletextus 7/26/2021-836 AM Microsoft Excel W 1918	
Select a file	
	to preview.

Correct Census Data – Save

If census spreadsheet was successfully loaded, click the **disc icon** to **Save** the information and then click **Next** to move forward in the process.

Total	Employees	Employees	Employee+Child(s)	Employee-Spouse	Employee+Family
	17	3	0	1	3
			Deine Al Dete		E
2	Employee 1 Aurthur Weakey	1 dependents			
8	Employee 2 Harry Potter	2 dependents			
	Employee 3 Hemotine Granger	1 dependent			
	Employee 4 Neulite Longforttom	0 dependents			
1	Employee 3 Rubeus Hagrid	0 dependents			
8	Employee 6 Dobby EM	0 dependents			
2	Employee T Padros Amidala	4 Sepandents			



Incorrect Census Data

An error message displays if the census is missing information or is formatted incorrectly.

Upload M	embership				
Download .C	SV Template				
To	tal Employees	Employees	Employee+Child(s)	Employee+Spouse	Employee+Family
	17	3	0	1	3
			Delete Al Data 🔹 Uplicad Employees		8
,	Employee 1 Aurther Weasley	3 dapendents		A Missing information	8
5	Employee 2 Havry Potter	2 dependents		A Masing Information	
>	Employee 3 Harmoine Granger	1 dependent		A Missing Information	
>	Employee 4 Neville Longbottem	0 dependents		A Making Information	

Click on the arrow icon by the employee name to expand the information section. From here you can do one of the following:

- review the error message and correct the employee details.
- delete the employee by clicking on the trash can icon.
- delete all data, make corrections to the spreadsheet and upload a new census.

To correct the employee information, **click the arrow** to the left of the employee's name. The following screen displays. Revisions can be made in the necessary field(s).

Employee 1 Aurther Weat	alay		3 depende	eta l			A Vision Information	-0		0
Details 🕗										
Social Security Number		Prictane		Last Neme		Address		01		
		Auther		Westley						
		and the second sec								
194 1		20101		10141001		NON FIELD		CALIFICATION CONTRACTOR		
rat.		Briegtive Date		Hive Date		Britslate		Sedar		
						Nov 1, 1958		blate	*	
O' Norter		HIA		Hits Bear Date		Process Date		Terr Date		
		-Nore-	*							
		Provide States		-						
-None-	*	-Note-	+	Singlayee	*					
Social Security Number is required	Address is required	Oty is required. State is required. Bf	Active Date is required. H	A surgistent, Sub Group is required.	0					

Delete All Census Data

If there are multiple errors, you can delete the entire census and upload a new census file by clicking the **Delete All Data** button.



	o—	oo		11		
			Census information			1
Census Information						
The number of eligible employees fro Please upload the employee informat	im the "Group Information Step" mus ion spreadsheet file.	t match the Total number of M	lembers.			
Download Excel Template						
Total Members	Total Emp	Emp	Emp+Child	Emp+Children	Emp+Spouse	Emp+Family
13	7	4	1	2	0	0
		Delete	All Data	Add Employee		Sine Sine

Confirm data deletion by clicking **Delete** on the pop-up window. Or, you may click **Cancel** to navigate back to the **Census Information** screen.

Delete All Data		
Are you sure you want to delete all census members? This operation cannot be undon	ie.	
	Cancel	Delete

On the **Census Information** screen upload a new census spreadsheet by selecting **Smart Census Upload**.

Manual Employee Entry

If you choose not to upload a census, the employee and dependent information can be added manually. Click **Add Employee** to add the employees' and their dependent information manually.

	oo	o			
		Census Information			
Census Information					
The number of eligible employees from the Please upload the employee information Download Excel Template	he "Group Information Step" must match the spreadsheet file.	Total number of Members.			
Total Members	Total Emp	Emp	Emp+child(s)	Emp+Spouse	Emp+Family
0	0	0	0	0	0
		🗘 Smart Census	Upload Add Employee		
Please save your Census information before	pre you continue.				
Please add Census members before you	continue.				
Save for later				Previous	Next

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



		۰	oo			
			Census Inform	ation		
Census Info	ormation					
The number of Please upload	of eligible emp the employe	ployees from the "Group Info ee information spreadsheet fi	rmation Step" must match le.	the Total number of Members.		
Download Exe	cel Template					
Tota	al Members	Total Emp	Emp	Emp+child(s)	Emp+Spouse	Emp+Family
	1	1	1	0	0	0
			Delete All Data	mart Census Upload Add Employe	ж	Save
	⊘ Census E	rror(s) - Please make corrections				
[>	Employee 1	0 dependents	A N	Aissing Information	â
Please s	save your Census	information before you continue.				
Save for late	er				Previous	Next

Enter the employee information.

- First Name
- Last Name
- Gender from the drop down
- Birthdate
- Cobra Select Yes or No
- Out of Area Select Yes or No
- Postal Code
- Product Line Leave blank
- Relationship Defaults to Employee

Add a dependent by clicking the **Add Dependent** button. Then click the > button to expand the screen.

> Dependents		
Add Dependent]	

Enter the dependent information.

- First Name
- Last Name
- Gender from the drop down
- Birthdate
- Cobra Select Yes or No
- Out of Area Select Yes or No
- Postal Code



- Product Line Leave blank
- Relationship Select Child or Spouse

Continue to add additional dependents for the employee by following the process detailed above.

Save each Employee and Dependent Entry

Click the **floppy disc** icon to save the information for each employee or dependent record.

	Delete All Dat	a Smart Census Uj	Add Employee		Save
O Census Error(s) - Please mak	e corrections				
Employee 1	0 depe	ndents	A Missir	g Information	ĉ
∨Details First Nørne	Last Name	Gender None 💌	Birthdate	Age NaN	
COBRA	Out of Area	Primary Member Identifier G41VND	Member Identifier G41VND	Postal Code	
Product Line	Relationship Employee 💌				

To add another employee, click **Add Employee** and repeat the process until all employees are entered. Rember to save (click the floppy disc icon) each employee and/or dependent record after entry.

Once all the employee/dependent records have been entered, click **Next** to proceed to the next screen.



Plan Selection

On the **Plan Selection** page, select the plans that you would like to quote.

On this page you can filter plans, compare plans, view the plan details benefit summary, and add plans to the cart.

To filter plans, use the drop-down arrow to choose your filter options from Product Type, Product Lines, and Deductible, then click **Apply**. A list of plans matching your criteria is displayed.

		Plan Selection		
lan Selection				
Please select at least one plan	n to proceed.			
letal Level Product Type Pr None	roduct Lines Deductible None]	4	Review Ca
		82 Available Plans		
Sentara Vantage Pl	atinum 0 Ded 100 Rx Ded		Compare	
Sentara Vantage Pla	atinum 0 Ded 100 Rx Ded		Compare	
Sentara Vantage Pla Plan Details Benefit Summary Standout Features	atinum 0 Ded 100 Rx Ded		Compare	
Sentara Vantage Pla Plan Details Benefit Summary Standout Features ANNUAL DEDUCTIBLE S0/S0	out-of-pocket LIMIT \$2,800/\$5,600	PRIMARY DOCTOR COVERAGE S10 Copay	Compare	
Sentara Vantage Pla Plan Details Benefit Summary Standout Features ANNUAL DEDUCTIBLE SO/SO SPECIALIST COVERAGE S20 Copay	atinum 0 Ded 100 Rx Ded out-of-pocket limit \$2,800/\$5,600 PRESCRIPTION DRUG COVERAGE CLS BD: 15/50 AD: 20%/20%	PRIMARY DOCTOR COVERAGE S10 Copay EMERGENCY ROOM COVERAGE S350 Copay	Compare	

To compare plans, click the **Compare** box of the plan you want to compare and then click the **Compare** button next to the Review Cart button in the upper right corner of the screen.

Please select at least one plan	to proceed.			
al Level Product Type Pr None VNone V	oduct Lines Deductible None None Apply	82 Available Dlaps	₽.	Compare Review Cart
S400 Copay				+ Add to Cart
Sentara Vantage Pla	atinum 0 Ded 150 Rx Ded			Compare
Sentara Vantage Pla Plan Details Benefit Summary	atinum 0 Ded 150 Rx Ded			Compare
Sentara Vantage Pla Plan Details Benefit Summary Standout Features	atinum 0 Ded 150 Rx Ded			Compare
Sentara Vantage Pla Plan Details Benefit Summary Standout Features ANNUAL DEDUCTIBLE SO/SO	OUT-OF-POCKET LIMIT \$3,000/56,000	PRIMARY DOCTOR COVERAGE \$15 Copay		Compare



A separate window is displayed where you can view information for each plan. Click the ">" button to expand the viewing options. Click the "X" button to exit the screen.

	Sentara Vantage Platinum 0 Ded \$0.00/Mo	Sentara Vantage Platinum Ded 100 Rx Ded \$0.00/Mo	0 Sentara Vantage Platinun Ded 150 Rx Ded \$0.00/Mo
Annual Deductible	\$0/\$0	\$0/\$0	\$0/\$0
Out-of-Pocket Limit*	\$2,500/\$5,000	\$2,800/\$5,600	\$3,000/\$6,00
Primary Doctor Coverage*	\$25 Copay	\$10 Copay	\$15 Copay
Specialist Coverage*	\$50 Copay	\$20 Copay	\$35 Copay
Emergency Room Coverage*	30% Coins	\$350 Copay	\$350 Copay
Hospital Stay Coverage*	\$300 Copay/day/\$1,200 max	S400 Copay	\$600 Copay
Prescription Drug Coverage*	CLS 10/40/20%/20%: \$350 max	CLS BD: 15/50 AD: 20%/20%: \$350 max: \$100 RX DED	CLS BD: 10 AD: 40/20%/20% \$350 max: \$150 RX DED



Plan Details

To view more information about the plan features, select the Plan Details link.

	oo	•••••		
		Plan Selection		
Plan Selection				
Please select at least one plan t	o proceed.			
Metal Level Product Type Pro	duct Lines Deductible None V Apply	1	▶ [Review Cart
		82 Available Plans		
Sentara Vantage Pla Plan Details Benefit Summary Standout Features	tinum 0 Ded 100 Rx Ded		Compare	
ANNUAL DEDUCTIBLE SO/SO	OUT-OF-POCKET LIMIT \$2,800/\$5,600	PRIMARY DOCTOR COVERAGE \$10 Copay	\$0.00/Mo	
SPECIALIST COVERAGE \$20 Copay	PRESCRIPTION DRUG COVERAGE CLS BD: 15/50 AD: 20%/20%	EMERGENCY ROOM COVERAGE S350 Copay		

Benefit Summary

To view the Benefit Summary for the plan, select the Benefit Summary link.

		Plan Selection		
Plan Selection				
Please select at least one plan	to proceed.			
Aetal Level Product Type Pro	oduct Lines Deductible None V Apply	l		Review Cart
		82 Available Plans		
Sentara Vantage Pla	ntinum 0 Ded 100 Rx Ded		Compare	
Sentara Vantage Pla	ntinum 0 Ded 100 Rx Ded		Compare	
Sentara Vantage Pla Plan Details Benefit Summary Standout Features	ntinum 0 Ded 100 Rx Ded		Compare	
Sentara Vantage Pla Plan Details Benefit Summary Standout Features ANNUAL DEDUCTIBLE SO/SO	out-of-Pocket LIMIT \$2,800/\$5,600	PRIMARY DOCTOR COVERAGE \$10 Copay	Compare	
Sentara Vantage Pla Plan Details Benefit Summary Standout Features ANNUAL DEDUCTIBLE S0/S0 SPECIALIST COVERAGE	OUT-OF-POCKET LIMIT S2,800/S5,600 PRESCRIPTION DRUG COVERAGE PRESCRIPTION DRUG COVERAGE	PRIMARY DOCTOR COVERAGE S10 Copay EMERGENCY ROOM COVERAGE	Compare	
Sentara Vantage Pla Plan Details Benefit Summary Standout Features ANNUAL DEDUCTIBLE SO / SO SPECIALIST COVERAGE S20 Copay	OUT-OF-POCKET LIMIT \$2,800/\$5,600 PRESCRIPTION DRUG COVERAGE CLS BD: 15/50 AD: 20%/20%	PRIMARY DOCTOR COVERAGE 510 Copay Emergency room coverage 5350 Copay	Compare	

To choose a plan, click Add to Cart.



		Plan Selection		
Plan Selection				
Please select at least one plan	to proceed.			
etal Level Product Type Pro	oduct Lines Deductible None			leview C
		82 Available Plans		
Sentara Vantage Pla Plan Details Benefit Summary	atinum 0 Ded 100 Rx Ded		Compare	
Sentara Vantage Pla Plan Details Benefit Summary Standout Features	tinum 0 Ded 100 Rx Ded		Compare	
Sentara Vantage Pla Plan Details Benefit Summary Standout Features ANNUAL DEDUCTIBLE SO/SO	out-of-pocket LIMIT \$2,800/\$5,600	PRIMARY DOCTOR COVERAGE \$10 Copay	Compare	
Sentara Vantage Pla Plan Detalls Benefit Summary Standout Features ANNUAL DEDUCTIBLE SO/SO SPECIALIST COVERAGE S20 Copay	out-of-pocket LIMIT 52,800/55,600 PRESCRIPTION DRUG COVERAGE CLS BD: 15/50 AD: 20%/20%	PRIMARY DOCTOR COVERAGE S10 Copay Emergency room coverage S350 Copay	Compare	

After all the desired plans have been selected, click the **Review Cart button**.

		Plan Selection		
an Selection				
None	uct Lines Deductible None		Compare Rev	iew Car
		82 Available Plans		
Sentara Vantage Diat	inum 0 Ded		Compare	
Sentara vantage Flat				
Plan Details Benefit Summary				
Plan Details Benefit Summary Standout Features				
Plan Details Benefit Summary Standout Features ANNUAL DEDUCTIBLE SO/SO	OUT-OF-POCKET LIMIT \$2,500/\$5,000	PRIMARY DOCTOR COVERAGE \$25 Copay	\$0.00/Mo	
CI Plan Details Benefit Summary	OUT-OF-POCKET LIMIT \$2,500/\$5,000 PRESCRIPTION DRUG COVERAGE	primary doctor coverage \$25 Copay emergency room coverage	\$0.00/Mo	
CI Plan Details Benefit Summary Standout Features ANNUAL DEDUCTIBLE S0/S0 SPECIALIST COVERAGE S50 Copay	OUT-OF-POCKET LIMIT \$2,500/\$5,000 PRESCRIPTION DRUG COVERAGE CLS 10/40/20%/20%: \$350	PRIMARY DOCTOR COVERAGE \$25 Copay EMERGENCY ROOM COVERAGE 30% Coins	\$0.00/Mo	
CI Plan Details Benefit Summary Standout Features ANNUAL DEDUCTIBLE S0/S0 SPECIALIST COVERAGE S50 Copay HOSPITAL STAY COVERAGE S300 Copay/day/S1,200 max	OUT-OF-POCKET LIMIT \$2,500/55,000 PRESCRIPTION DRUG COVERAGE CLS 10/40/20%/20%: \$350	PRIMARY DOCTOR COVERAGE \$25 Copay Emergency room coverage 30% Coins	\$0.00/Mo Added to Cart	
CE Plan Details Benefit Summary Standout Features ANNUAL DEDUCTIBLE S0/S0 SPECIALIST COVERAGE S50 Copay HOSPITAL STAY COVERAGE S300 Copay/day/S1,200 max	OUT-OF-POCKET LIMIT \$2,500/55,000 PRESCRIPTION DRUG COVERAGE CLS 10/40/20%/20%: \$350	PRIMARY DOCTOR COVERAGE \$25 Copay EMERGENCY ROOM COVERAGE 30% Coins	\$0.00/Mo	

Review Selected Plans

Review the selected plans in your cart.

- 1. If you would like to add additional plans, select the **Previous** button to return to the Plan Selection page. You can add as many additional plans as you desire.
- 2. To delete a plan from your cart, hover over the check mark and click the "X".
- 3. If you are happy with the selected plans, select Next to proceed.



						<u> </u>		
						Review Selected Plans		
Review Sele	ected Plans							
vledical Plans	Edit Selections							
Sentara Vanta	ge Platinum 0	Ded						9
S0.00/Mo Annual Ded	Out-of-Pock	Primary Do	Specialist C	Prescription	Emergency	Hospital Sta		
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Document Upload

To upload documentation for the quote, click **Upload Files** or drag and drop the files into the Quote Document Upload section. Additional documentation is not required for Small Group Quotes.

Click **Next** to continue.

Document Upload		
Clude Decument Upload ① Upload Files Or drop files Or		
Save for later	Previous	Next

Congratulations, your new quote is ready!

Click Go To Quote to save the quote and to view the quote details.

	O O Quote Summary
Quote Summary	
	Congratulations, your new quote is ready!
	Cilick Go To Quote to vlow your now quote.
	Previous Co To Quote



The Quote page is displayed.

F	Sentara [®] Health Plans	Home	Manage Your Book	Manage Yo	our Quotes	More 🗸						۰.	Test Broker1
ł	Quote PM Trair	ning Demo 7/1	/2025 Test A Broke	er1				Accept	Quote C	Generate Proposal	Clor	ne Quote	•
0	Quote Number 00092227	Expiration Date 6/30/2026	Opportunity ID PM Training Demo	Status Prospect	Type New Business								
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Quote Actions

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

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

Generate Proposal

Generate a proposal by clicking the Generate Proposal button.

Quote Acme G	Group 9/1/2021					Accept Quote	Generate Proposal	Clone Quote	•
Quote Number 00000862	Expiration Date 8/31/2022	Opportunity ID Acme Group 9/1/2021	Status Prospect	Total Price \$3,642.04	Type New Business				
In R	Review	Underwritten		Final Review		Closed	So	bld	
Details Related									
Quote Number 00000862				Effe 9/:	ective Date 1/2021				
Quote Name Acme Group 9/1/2021				Ber 9/:	nefit Effective Date 1/2021				

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





Note: it might take a few minutes for the proposal document to display while the information is being compiled.

	⊳	
Generating Proposal		
Proposal generated successfully. Proposal available on File section of the Quote'		
	• • •	
		Dravious Back to Ouste

Once compiled, the proposal document is displayed. You can **download to PDF** from this screen.

Generating Proposal	able on File contine of the Questel		
Proposal generated successfully. Proposal avail	able on File section of the Quote		
Proposal Document.pdf		ß	L Download PDF
	% ~ ⊖ ⊕		
	Sentara [®] Health Plans	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		

To exit the proposal document screen scroll to the bottom and select **Back to Quote**.



Files

The completed Proposal is stored in the Files section of the Quote under the Related Tab.

Quote Mickey	Mouse Clubhou	se 12/1/2024 Test A Br	oker1			Accept 0	Quote Generate P	roposal Cl	one Quote	•
Quote Number 00085793	Expiration Date 11/30/2025	Opportunity ID Mickey Mouse Clubhouse	Status Prospect	Type New Business						
	Prospect	In Review		Final Review		Sold		Closed		_
ed Details										
🔗 Quote Lin	ne Items (3)									C
Quote Lin	ne Items (3)				Pharmacy Code	Product Type	Product Sub Type	Total Price	Alternate	C ^r Plan
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Double click on the file record to open the Proposal Document. The files section can house numerous Proposal Documents. The newest document is displayed on the left side of the files section.

Proposal Document Edit and Action Options

While viewing the Proposal document, the following actions can be made:

- 1. Edit File Details allows you to change the name of the document and add a description. Click **Save** after you have made your edits.
- 2. **Delete** remove the Proposal Document from the quote file.



Edit	Proposal Document.pdf
1-6	
normauon	
*Title	
Proposal Document.pdf	
Description	
Created Date	
2/29/2024, 4:57 PM	
Last Modified Date	
2/29/2024. 4:57 PM	
	Cancel Sa

Exit the Proposal Document Preview

To exit the proposal document preview, click the white "X" in the top right corner of the screen to exit the Proposal Document Preview. Please note, the "X" may be hard to see.



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. A quote that is closed or sold cannot be edited.

When editing a quote, the following information **can be** changed:

- account demographics
- calendar year/contract year
- contact information
- plans

When editing a quote, the following information cannot be changed:

- zip code
- county
- census information
- effective date

If you need to change the zip code, county, census, or effective date, then the quote needs to be cloned.



To edit the quote select the drop down arrow next to Clone Quote and select Edit Quote from the dropdown menu.

Quote						Accept	Quote Generate P		
Quote Number 00085793	Expiration Date	se 12/1/2024 Test A Br Opportunity ID Mickey Mouse Clubhouse	oker1 Status Prospect	Type New Business		Accel			2 Edit Quote Close Quote
	Prospect	In Review		Final Review		Sold		Closed	
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									C
📀 Quote Lin	ie items (5)								
Quote Lin	ie items (5)				Pharmacy Code	Product Type	Product Sub Type	Total Price	Alternate Plan

The edit process follows the same screen progression as "Request a Quote". Make the necessary changes or edits on each screen that needs to be updated and click **Next** to move through the editing process.

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

To clone a quote, click **Clone Quote** from the drop-down menu next to Edit Quote on the Quote page and follow the process as outlined in the Create a Quote section. Click through each screen and make any necessary changes or skip to the next screen if changes are not needed.

Quote Acme (Group 9/1/2021	. John Broker					Clone Quote	Close Quote
Quote Number 00000863	Expiration Date 8/31/2022	Opportunity ID Acme Group 9/1/2021	Status In Review	Total Price \$0.00	Type New Business			
	In Review	Underwritte	n	Fi	nal Review	Closed	Sold	

Close a Quote

If a quote is not sold, it needs to be closed. To close a quote, click the **arrow** next to Clone Quote and select **Close Quote** from the dropdown menu.



Choose a **Status Reason** from the drop down and then click **Done**. If "Other" was selected, please include notes in the notes section.



Close Quote	
*Status	
Closed	•
*StatusReason	
Clear	^
Employer Preference	
Financial Offer	
Network	
Product	
Submission Incomplete / Withdrawn	
Does not meet Underwriting Criteria	
Other	

Accepting a Quote

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

Quote Test 15	9/1/2021 Barb	ara Penn				Accept Quote	Generate Proposal	Clone Quote	•
Quote Number 00059099	Expiration Date 8/31/2022	Opportunity ID Test 15 9/1/2021 Barbara Penn	Status Prospect	Type New Business					
	Prospect	-	inal Review		Closed		Sold		



Select Plans

Select the plan(s) that were Sold clicking the "+" signs by each plan and then click **Submit**. Only click the + sign for the sold plans.

J Available Flatis	
Sentara Direct Vantage Gold 1000 Ded 200 Rx Ded CLS BD: 15/AD: 50/30%/30%: \$350 max; \$200 RX DED \$2.898.05/Mo	+
Prescription Drug Coverage: CLS BD: 15/AD: 50/30%/30%: \$350 max; \$200 RX DED	
Sentara Direct Vantage Silver 4000 Ded 250 Rx Ded CLS AD:25/50/20%/20%: \$350 max; \$250 RX DED	
\$2,520.91/Mo Prescription Drug Coverage: CLS AD:25/50/20%/20%- \$350 may: \$250 PX DED	+
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\$2,831.00/Mo	+
Prescription Drug Coverage: CLS AD: 25/50/20%/20%: \$350 max; \$100 RX DED	
* Enrollment Rating Type	
· ·	
You must select a medical plan coverage	

Select the Enrollment Rating Type and click Submit.

		📜 🤤 View Cart 1
	3 Available Plans	
Sentara Direct Vantage Gold 1000 Ded 200 Rx Ded CLS BD: 15/Al \$2,898.05/Mo rescription Drug Coverage: CLS BD: 15/AD: 50/30%/30%: \$350 max; \$200 RX	0: 50/30%/30%: \$350 max; \$200 RX DED DED	+
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* Enrollment Rating Type	_]	



Group Application Process

After selecting the sold plans, the Application page is displayed. In this section you will:

- Upload Application Documents
- Add Group Classes Information
- Import Membership
- Submit Application

Health Plans Home Manage Your Book	Manage Your Quotes	More 🗸						Test B
Application								
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Upload Application Documents

Click on the Application Documents tab and upload the necessary documents.



Application		L Fallow Submit Application	Add Group Classes Impact Membarship
📽 a1rD20000046Zup			Aud Group Classes Import Membership
In Progress Application	Uploaded Rejected Submit	ted Membership Uploaded Membership A	pproved
Details Application Documents AppLICATION DOCUMENTS			
Reconciled VEC Report or Other 🛛 👻	Employer Group Application	ACH / EFT / Binder Check	Member App / Enrollment 🛛 👻 Spreadsheet
Due:	Due:	Due:	Due:
No Files Yet	No Files Yet	No Files Yet	No Files Yet
Waivers if needed	BA Portal User Profile	Extra Files in Application Documents	
Due:	Due:		
		Due:	
No Files Yet	No Files Yet	No Files Yet	

Once the steps are completed, click Submit Application.

Sentara' Home Manage Your Book Manage Your Quotes Health Plans	More V 🌲 Test Br
Application a1rD20000046Zup	+ Follow Submit Application Add Group Classes Import Members
In Progress Application Uploaded Rejected	Submitted Membership Uploaded Membership Approved
tails Application Documents	
Application Name	Status
a1rD20000046Zup	In Progress
Annual	
Account	Application Type
Mickey Mouse Clubhouse	Application Type New Business Tables Association
Mickey Mouse Clubhouse Opportunity Mickey Mouse Clubhouse	Application Type New Business Broker Account
Mickey Mouse Clubhouse Opportunity Mickey Mouse Clubhouse Outport	Application Type New Business Broker Account Mickey Mouse Clubhouse Common
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Account Mickey Mouse Clubhouse Opportunity Mickey Mouse Clubhouse Quote Mickey Mouse Clubhouse 12/1/2024 Test A Broker1 Census Contract Created By	Application Type New Business Broker Account Mickey Mouse Clubhouse Owner

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

Health Plans	Manage Your Book	Manage Your Quotes	More 🗸	📮 Test Broke
Application a1rD20000046Zup				+ Follow Submit Application Add Group Classes Import Membership
> In Progress	Application Uploaded	Rejected	Submitted	Membership Uploaded Membership Approved
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Application Name			Status	
a1rD20000046Zup			In Progres	55
a1rD20000046Zup Account			Application	ss n Type
a1rD20000046Zup Account Mickey Mouse Clubhouse			Application New Busin Broker Acc	ss
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a1/D200000462up Account <u>Mickey Mouse Clubhouse</u> Opportunity <u>Mickey Mouse Clubhouse</u> Quote <u>Mickey Mouse Clubhouse 12/1/2</u> Census Contract	2024 Test A Broker1		In Progres Application New Busin Broker Acc <u>Mickey M</u> Owner <u>Mickey M</u> Owner <u>Mickey M</u> Sales Rep <u>Ken Y</u> Primary Ap	ss
a1/D2000046Zup Account Mickey Mouse Clubhouse Opportunity Mickey Mouse Clubhouse Quote Mickey Mouse Clubhouse 12/1/2 Census Contract	2024 Test A Broker1		In Progres Application New Busin Broker Acc Mickey M Owner Mickey M Owner Mickey M Sales Rep Mickey M Sales Rep Mickey M Frimary Ap Test A Bro	ss
a1/D2000046Zup Account Mickey Mouse Clubhouse Opportunity Mickey Mouse Clubhouse Quote Mickey Mouse Clubhouse 12/1/2 Census Contract	2024 Test A Broker1		In Progres Application New Busin Broker Acc Mickey M Owner Marker Acc Sales Rep Ken Y Primary Ap Test A Bro Mode of El	ss
a1/D2000046Zup Account Mickey Mouse Clubhouse Opportunity Mickey Mouse Clubhouse Quote Mickey Mouse Clubhouse 12/1/2 Census Contract	2024 Test A Broker1		In Progres Application New Busin Broker Acc Mickey M Owner Mickey M Sales Rep Ken Y Primary Ap Test A Bro Mode of El	ss

Fill out the Group Class Information and click Next



Employee Class	⊳	* New Hire
	•	
Exact # of Days from the Date of Hire		ALL MONTHS ARE 30 DAYS
Following		Number of Days
	•	Clear
itudent Dependent Age		Non - Student Dependent Age
26		26
itudent Termination Rule		Non-Student Termination Rule
M = End of Month	•	M = End of Month
Percentage Amount imployer Contribution % ->100 imployer %	50	
50		
Dependent - Please select your mode of contribution: Percentage Amount		
mployer Contribution %		
	50	
•-100		
imployer %		

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

Group Class Created	
Group class has been created for Group Test 15	
	Finish



Import Membership

Once your group application is in the submitted stage, 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.**

Download the enrollment spreadsheet by clicking the Download .CSV Template and clicking **Upload Employees**. After it has been successfully loaded, click **Next**.

Download	Membership I .CSV Template				
	Total Members 17	Employees 1	Employee+Child(s)	Employee+Spouse 3	Employee+Family 1
			Delete All Data	ployees	Ľ
>	Employee 1 Mary Brown	1 de	pendent		÷
>	Employee 2 George Jones	1 de	pendent		â
>	Employee 3 Stephanie Davis	1 de	pendent		â
>	Employee 4 Mike Lopez	1 de	pendent		â
>	Employee 5 Mary Martin	5 de	pendents		â
>	Employee 6 Anne Anderson	0 de	pendents		Next



How to Navigate to a Completed Quote

On the home screen, click the **Manage Your Quotes** button and then use the drop down arrow to select **All Quotes** from the menu. To navigate to a specific quote, click on the **link** listed under the **Quote Name column.**

***Note** If you click on a link listed under a different column you won't be taken to the quote screen, you will be taken to the screen that correlates with the Column Header Name.

5	Ser Heal	itara ' th Plans	Home	Manage Your Book	M	lanage Your Quotes	More 🗸					ŧ	Test Bro	ker1 🙆
	S0+ item:	Quotes All Quotes ▼ s • Sorted by Creat	 ed By • Filtered by All	quotes - Market Segment, Fu	unding	g Type • Updated a minute a	go		Q Search	this list	\$ ×		, e	T
		Quote Name	`	Quote Number	\sim	Account Name 🗸 🗸	Opportunity Name 🗸	Status 🗸	Effective D 🗸	Market Seg \smallsetminus	Funding \lor	Created By 1	\sim	Mo
	1	UAT_Test_SM_	0503_20230510	00078979		UAT_Test_SM_0503	UAT_Test_SM_0503	Prospect	5/15/2023	Small Group	Fully Insured	Ajay Selvaraj		
	2	UAT_Test_SM_	0503_20230510	00078980		UAT_Test_SM_0503	UAT_Test_SM_0503	Prospect	5/15/2023	Small Group	Fully Insured	Ajay Selvaraj		,

On the **Quote Detail** screen, you will see the quote information, the status of the quote and be able to perform quote actions. Click the **Related Tab** to view the quote line items.

Quote Test 12	/1/2021 Annie	Broker					Generate Proposal	Clone Quote	Close Quote
Quote Number 00059470	Expiration Date 11/30/2022	Opportunity ID Test 12/1/2021	Status Final Review	Type New Business					
	~		Final R	eview	CI	losed		Sold	
etails Related									
Quote Number					Effective Date				
Quote Name					Expiration Date				
Test 12/1/2021 Annie E	Broker				11/30/2022				
Opportunity Name					Renewal Month				
lest 12/1/2021					December				



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

Final Step	Membership Uploaded	
		Finish

The status of your group application updates to Membership Uploaded.

Application a1r7f000001Fy0G								Submit Application	Add Group Classes	Import Membership
~ ~		~		~		~	Membership Uploaded	Membership App	roved	
Guidance for Success										
Thank you for uploading your membership. It is now under review.										

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

Application a1r7f000001Fy0G		Submit Application	Add Group Classes	Import Membership				
Guidance for Success Congratulations! Your membership	has been approved!	〉 ~	> ~	>	~	Membership Appr	oved	

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