

## **Broker User Guide – Mid-Market Quotes**

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## Purpose

The purpose of this user guide is to outline the mid-market quote process. The process includes how to:

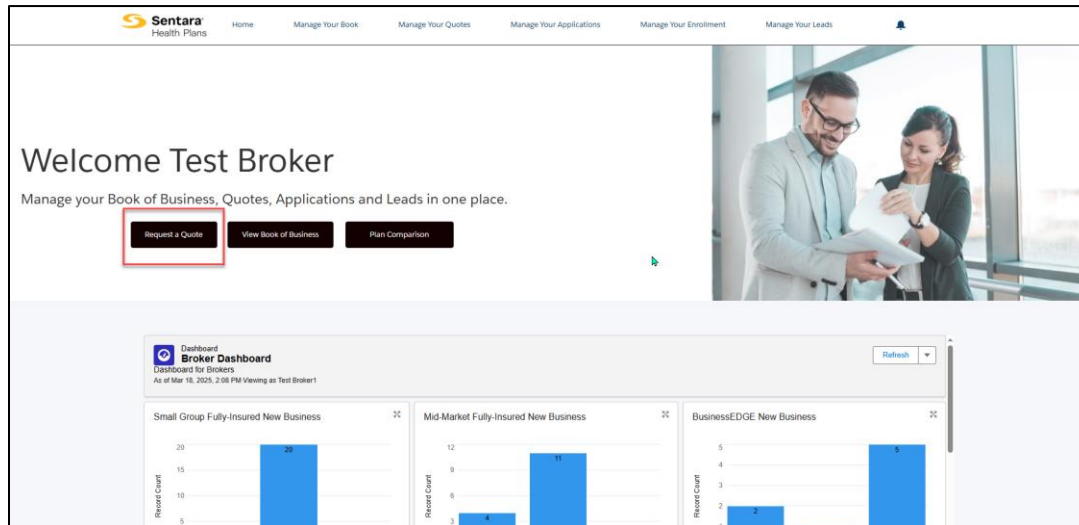
- create a new quote
- perform quote actions
- initiate group application process

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		

## Create New Quote

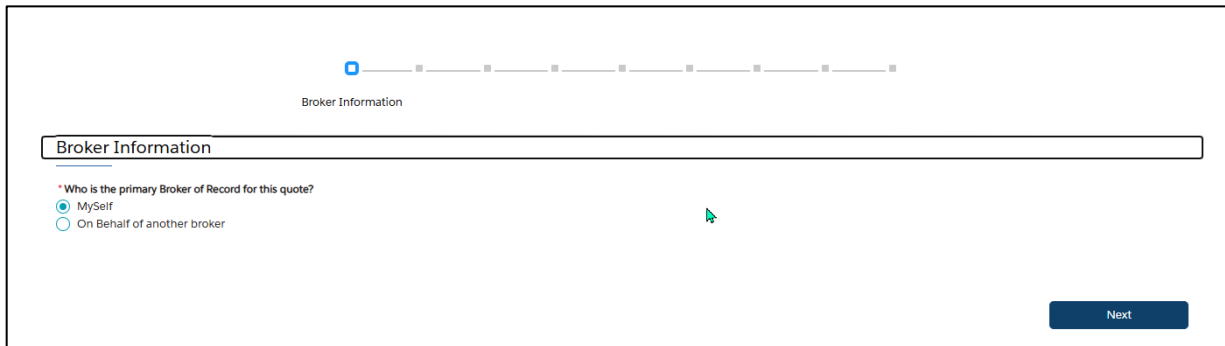
Click the **Request a Quote** button on the home screen.



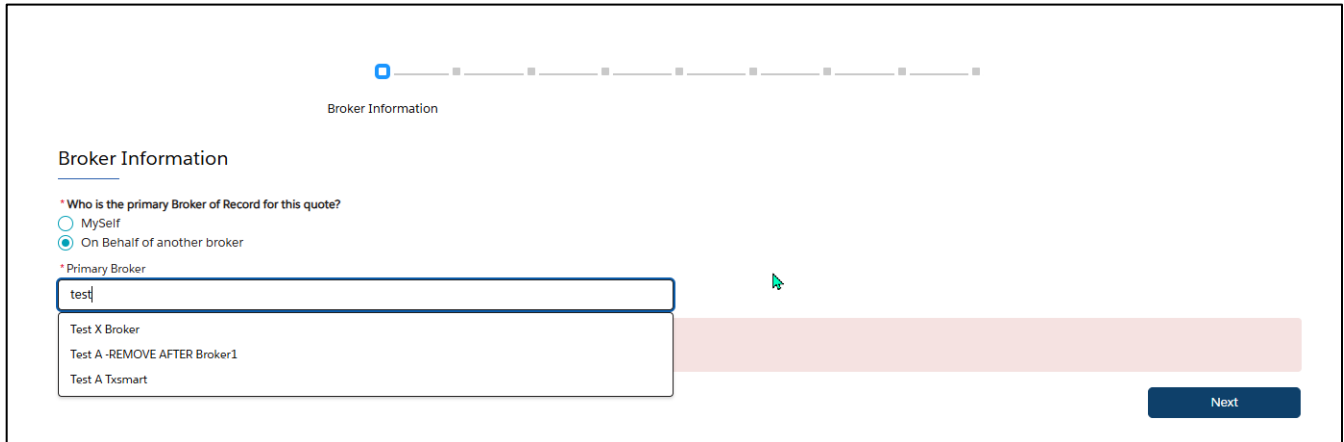
## Broker Information

Select the primary broker of record for the quote.

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



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.

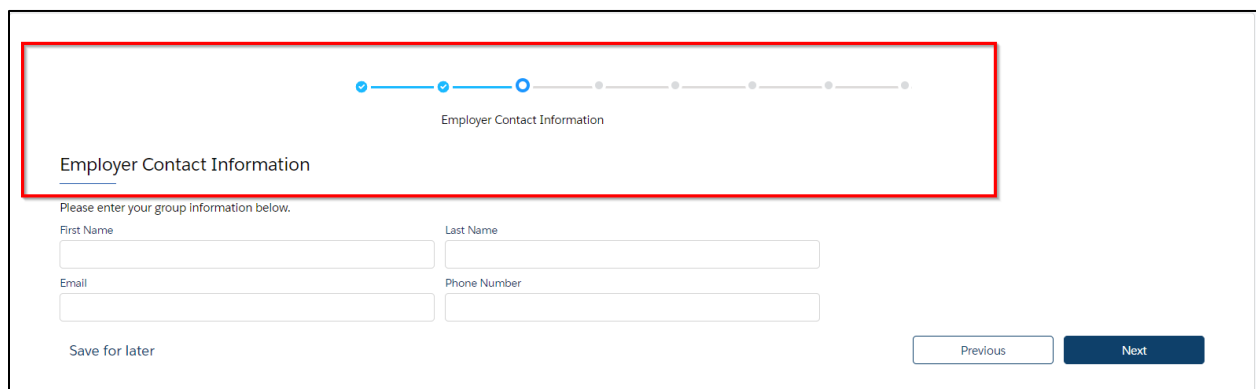


Once the primary broker is chosen, click **Next**.

## Navigation - Quote Status Bar and Save for Later

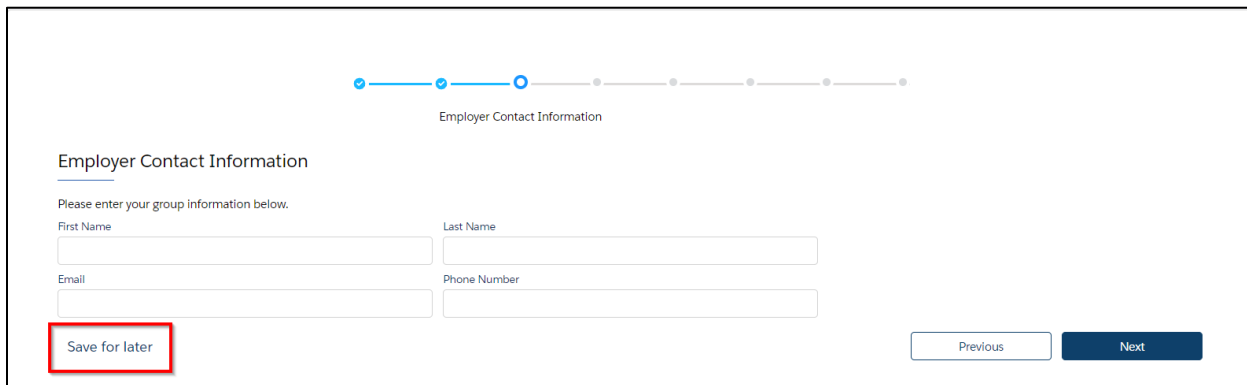
### Status Bar

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.



### 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)



The form is titled "Employer Contact Information" and is part of a multi-step process. It contains four input fields: "First Name", "Last Name", "Email", and "Phone Number". A "Save for later" button is highlighted with a red box. There are also "Previous" and "Next" buttons at the bottom right.

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.



The screen displays a green checkmark icon and the text "Your Quote is saved for later". Below this, a red box highlights the text "To resume, please click or bookmark the link." followed by two links: "Copy the link" and "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.




The "Search Address" field is shown with a dropdown menu. The input field contains "800 in". The dropdown list shows several address options: "800 Indiana Street, San Francisco, CA, USA", "800 Independence Avenue Southwest, Washington, DC, USA", "800 Independence Boulevard, Virginia Beach, VA, USA", "Avenida Insurgentes Sur 800, Colonia del Valle Centro, Mexico City, CDMX, Mexico", and "800 Industrial Drive, Denison, IA, USA". A hand cursor is pointing at the third option. The text "powered by Google" is visible at the bottom right of the dropdown.

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

- 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



Group Information


### Group Information


Please enter your group information below.

\* Effective Date

\* Group Name


Trade Name

Search Address 

Street 

City  State

\* Zip Code  County

 Zipcode is not valid

\* Total Number of Employees  \* Eligible Number of Employees  \* Number of Enrolled Employees

Incumbent Carrier

Carrier Id

☐ No Current Carrier Other Incumbent Carrier

Industry Type  SIC Code

\* Funding Type  
☐ Level Funded ☐ Fully Insured

\* Plan Type  
☐ Calendar ☒ Contract

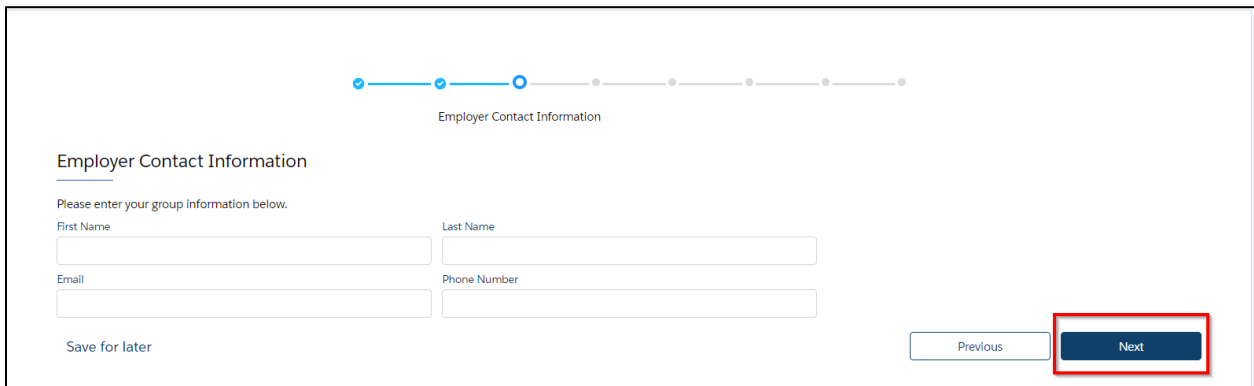
Save for later

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.



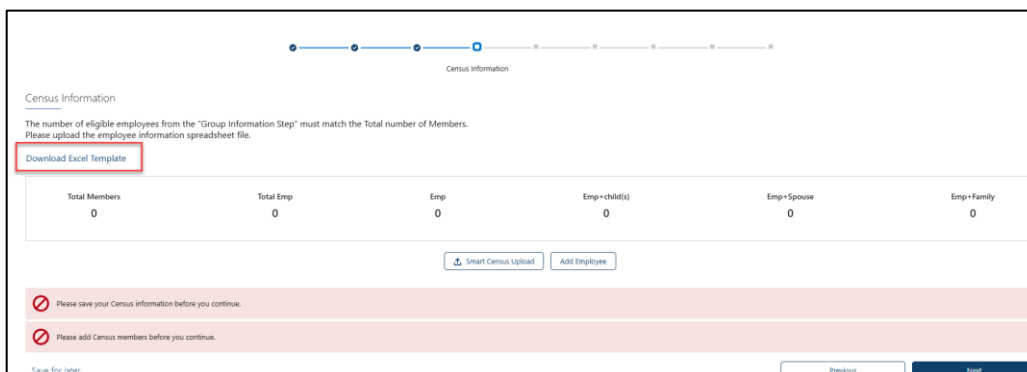
The form displays a progress bar at the top with seven steps. The third step, 'Employer Contact Information', is the current active step, indicated by a blue circle. Below the progress bar, the title 'Employer Contact Information' is followed by the instruction 'Please enter your group information below.' There are four input fields: 'First Name', 'Last Name', 'Email', and 'Phone Number'. A 'Save for later' link is located at the bottom left. At the bottom right, there are two buttons: 'Previous' and 'Next'. The 'Next' button is highlighted with a red rectangular border.

## 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.



The form displays a progress bar at the top with seven steps. The fourth step, 'Census Information', is the current active step, indicated by a blue square. Below the progress bar, the title 'Census Information' is followed by the instruction 'The number of eligible employees from the "Group Information Step" must match the Total number of Members. Please upload the employee information spreadsheet file.' A 'Download Excel Template' button is highlighted with a red rectangular border. Below this, there is a table with six columns: 'Total Members', 'Total Emp', 'Emp', 'Emp+child(s)', 'Emp+Spouse', and 'Emp+Family'. All values in the table are 0. Below the table, there are two buttons: 'Smart Census Upload' and 'Add Employee'. At the bottom left, there are two red error messages: 'Please save your Census information before you continue.' and 'Please add Census members before you continue.' At the bottom right, there are two buttons: 'Previous' and 'Next'.

Total Members	Total Emp	Emp	Emp+child(s)	Emp+Spouse	Emp+Family
0	0	0	0	0	0



## 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
- **Number of Children** – entered on employee line
- **Product Line**
  - 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

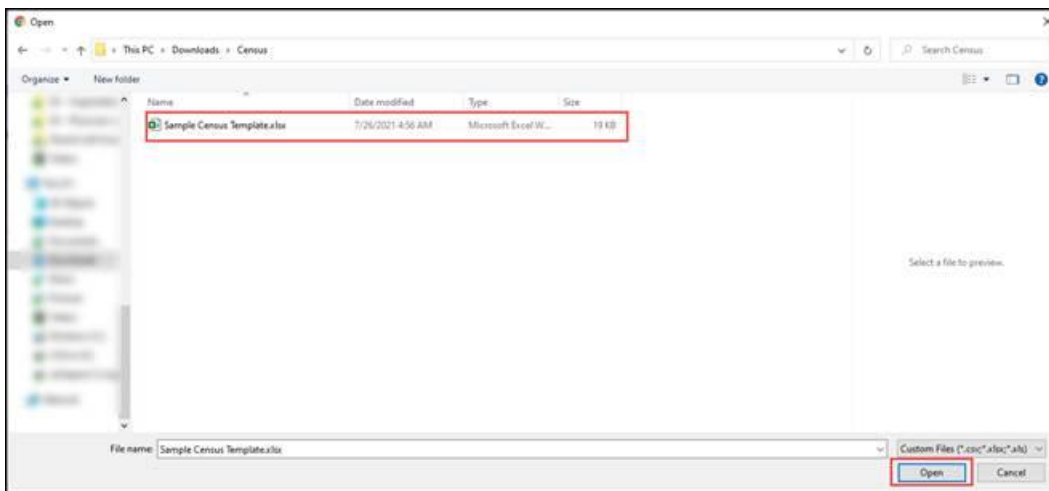
To upload a completed Census Spreadsheet, click **Smart Census Upload**. Select the census file from its saved location on your computer. Click on the file name, and then select **Open**.

Census Information

The number of eligible employees from the "Group Information Step" must match the Total number of Members.  
Please upload the employee information spreadsheet file.

Download Excel Template

Total Members	Total Emp	Emp	Emp+child(s)	Emp+Spouse	Emp+Family
0	0	0	0	0	0



## 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.

Upload Membership

Download CSV Template

Total Employees	Employees	Employee+Child(s)	Employee+Spouse	Employee+Family
17	3	0	1	3

Employee	Dependents	Dependents
Employee 1 Aurthur Blaisley	3 dependents	<input type="button" value="Add"/>
Employee 2 Harry Potter	2 dependents	<input type="button" value="Add"/>
Employee 3 Hermione Granger	1 dependent	<input type="button" value="Add"/>
Employee 4 Neville Longbottom	0 dependents	<input type="button" value="Add"/>
Employee 5 Rubeus Hagrid	0 dependents	<input type="button" value="Add"/>
Employee 6 Dobby Elf	0 dependents	<input type="button" value="Add"/>
Employee 7 Padma Patil	4 dependents	<input type="button" value="Add"/>

## Incorrect Census Data

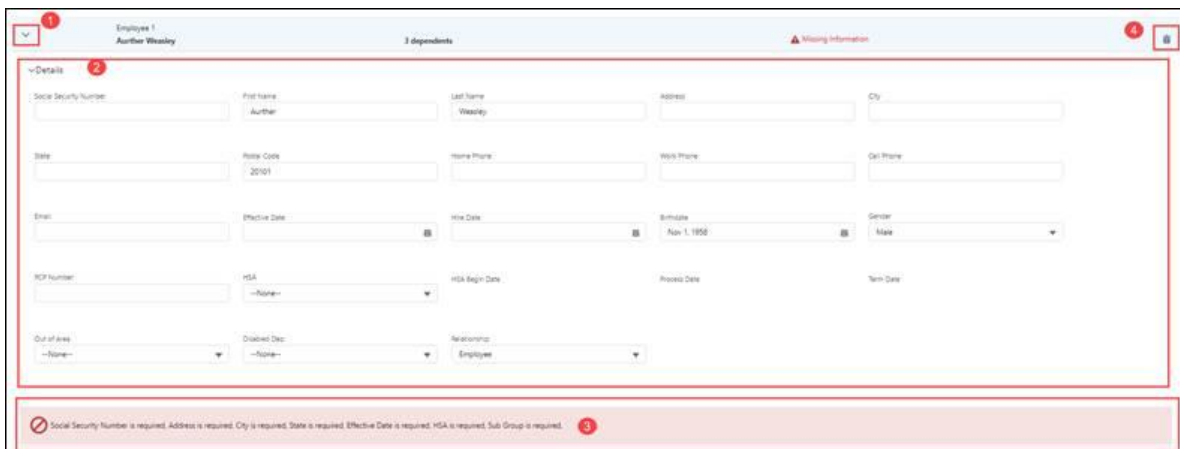
An error message displays if the census is missing information or is formatted incorrectly.



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

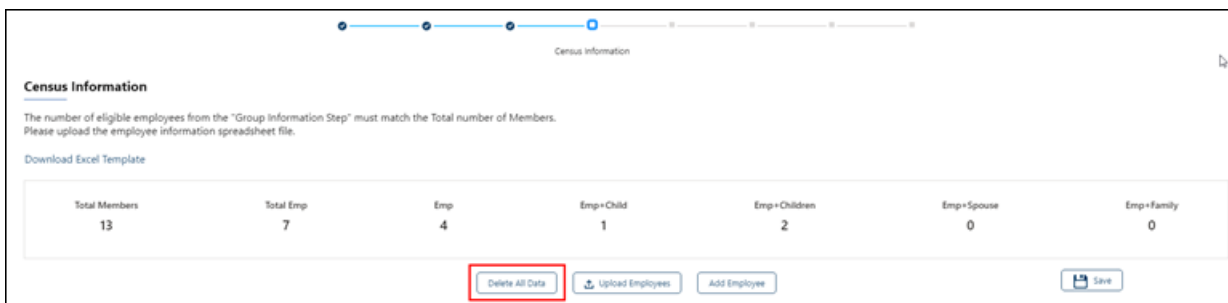
- review the error message and correct the employee details.
- delete the employee by clicking on the trash can icon.
- delete all data, make corrections to the spreadsheet and upload a new census.

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).



## 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.



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 undone.

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.



Census Information

### Census Information

The number of eligible employees from the "Group Information Step" must match the Total number of Members. Please upload the employee information spreadsheet file.

[Download Excel Template](#)

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 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.

Census Information

Census Information

The number of eligible employees from the "Group Information Step" must match the Total number of Members.  
Please upload the employee information spreadsheet file.

[Download Excel Template](#)

Total Members	Total Emp	Emp	Emp+child(s)	Emp+Spouse	Emp+Family
1	1	1	0	0	0

[Delete All Data](#)
[Smart Census Upload](#)
[Add Employee](#)
[Save](#)

⚠️ Census Error(s) - Please make corrections

[>](#) Employee 1      0 dependents      ⚠️ Missing Information      🗑️

⚠️ Please save your Census information before you continue.

[Save for later](#)
[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.

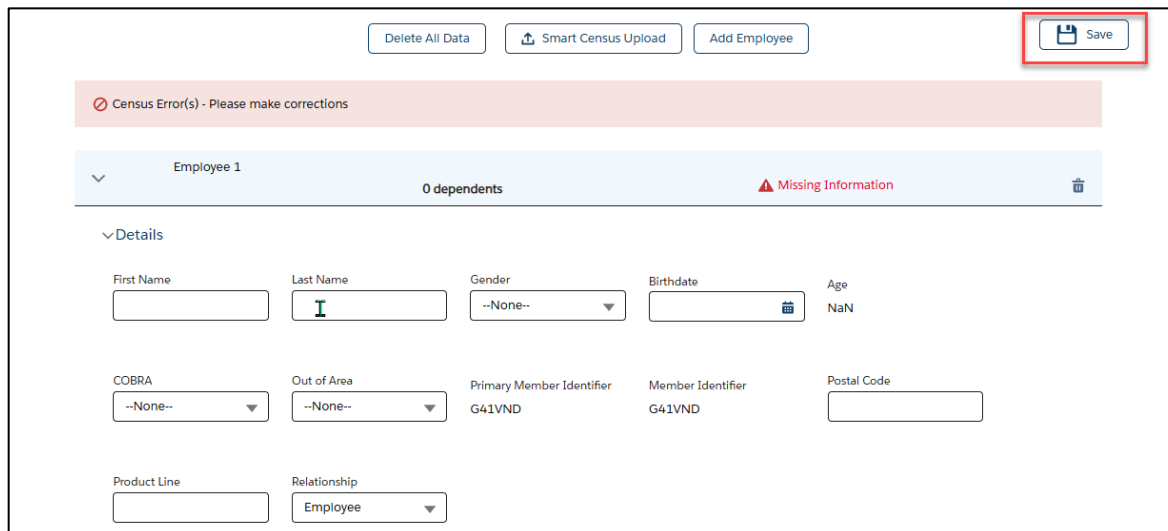
- First Name
- Last Name
- Gender from the drop down
- Birthdate
- Cobra – Select Yes or No
- Out of Area – Select Yes or No
- Postal Code
- Product Line – Leave blank

- 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.



Buttons: Delete All Data, Smart Census Upload, Add Employee, **Save** (floppy disc icon)

**Census Error(s) - Please make corrections**

Employee 1 | 0 dependents | **Missing Information**

**Details**

First Name:  | Last Name:  | Gender: --None-- | Birthdate:  | Age: NaN

COBRA: --None-- | Out of Area: --None-- | 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. Remember to save (click the floppy disc icon) each employee and/or dependent record after entry.

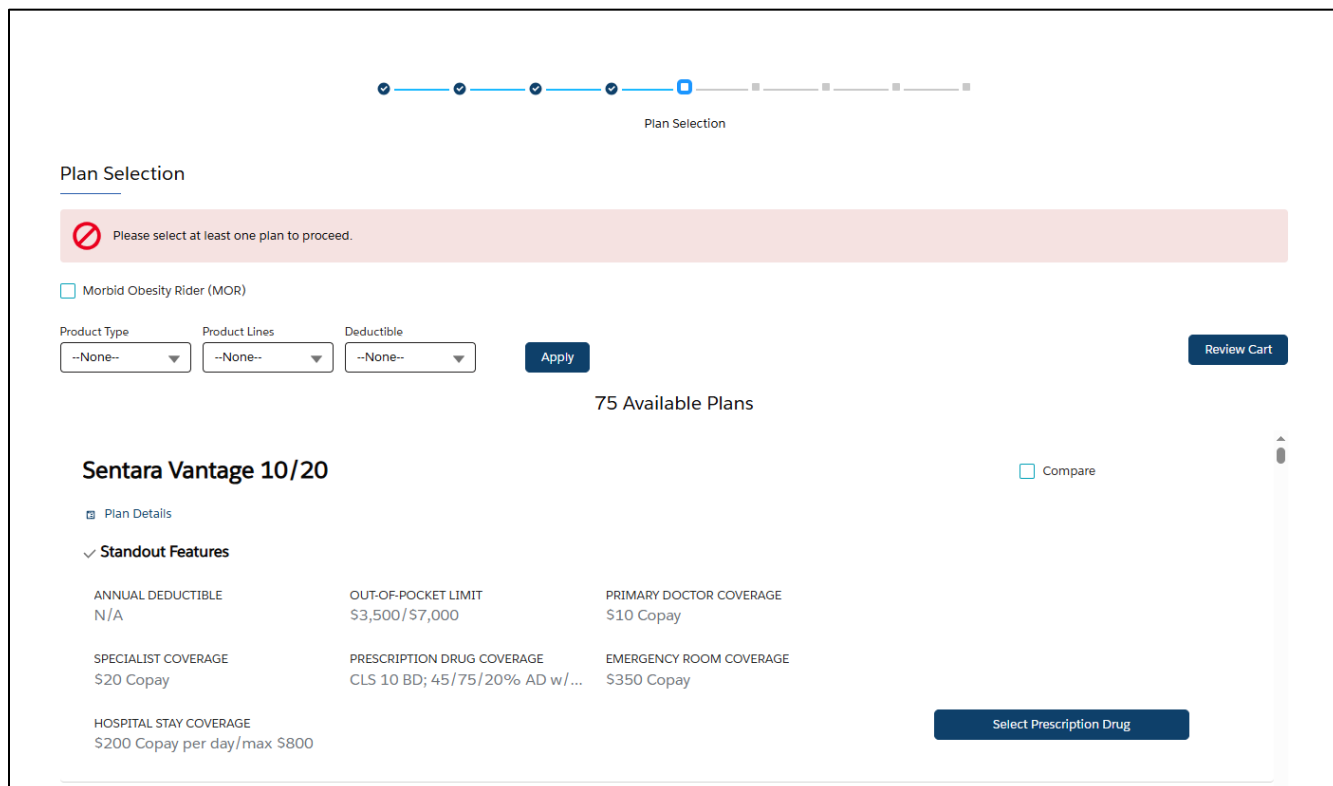
Once all the employee/dependent records have been entered, click **Next** to proceed to the next screen.

## 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

Please select at least one plan to proceed.

☐ Morbid Obesity Rider (MOR)

Product Type: --None-- Product Lines: --None-- Deductible: --None-- [Apply](#) [Review Cart](#)

75 Available Plans

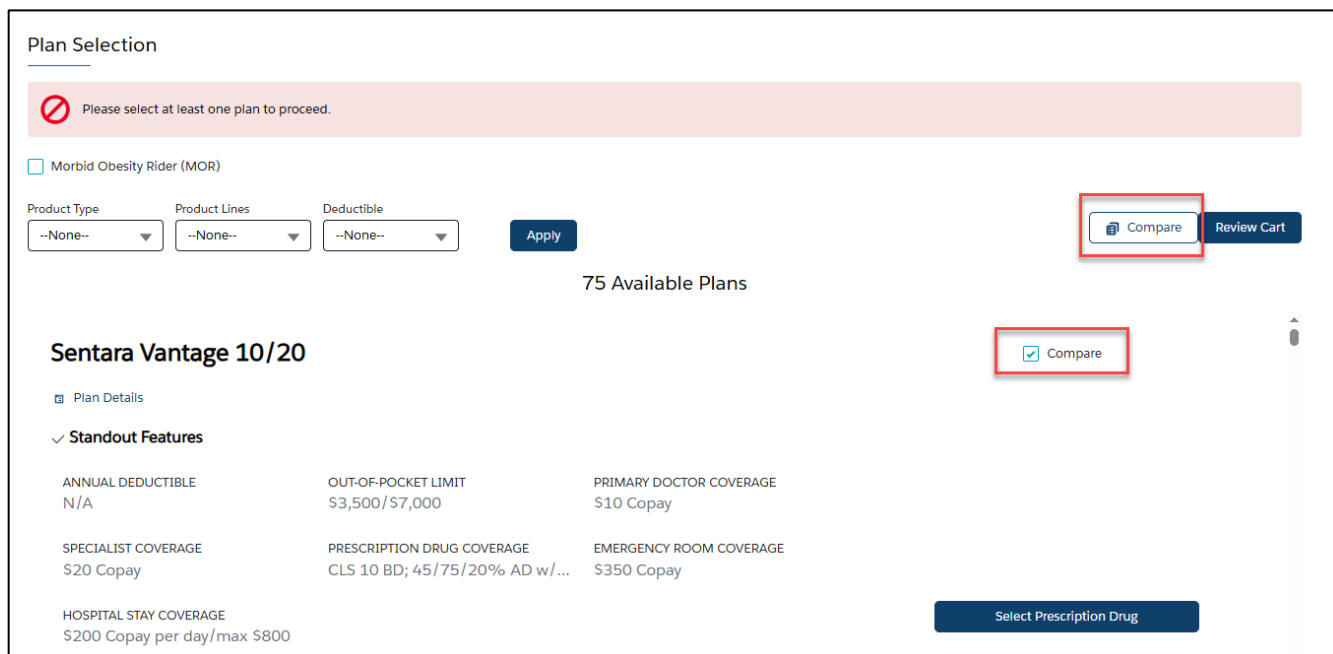
**Sentara Vantage 10/20** ☐ Compare

[Plan Details](#)

✓ **Standout Features**

ANNUAL DEDUCTIBLE N/A	OUT-OF-POCKET LIMIT \$3,500/\$7,000	PRIMARY DOCTOR COVERAGE \$10 Copay
SPECIALIST COVERAGE \$20 Copay	PRESCRIPTION DRUG COVERAGE CLS 10 BD; 45/75/20% AD w/...	EMERGENCY ROOM COVERAGE \$350 Copay
HOSPITAL STAY COVERAGE \$200 Copay per day/max \$800	<a href="#">Select Prescription Drug</a>	

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.



Plan Selection

Please select at least one plan to proceed.

☐ Morbid Obesity Rider (MOR)

Product Type: --None-- Product Lines: --None-- Deductible: --None-- [Apply](#) [Compare](#) [Review Cart](#)

75 Available Plans

**Sentara Vantage 10/20** ☒ Compare

[Plan Details](#)

✓ **Standout Features**

ANNUAL DEDUCTIBLE N/A	OUT-OF-POCKET LIMIT \$3,500/\$7,000	PRIMARY DOCTOR COVERAGE \$10 Copay
SPECIALIST COVERAGE \$20 Copay	PRESCRIPTION DRUG COVERAGE CLS 10 BD; 45/75/20% AD w/...	EMERGENCY ROOM COVERAGE \$350 Copay
HOSPITAL STAY COVERAGE \$200 Copay per day/max \$800	<a href="#">Select Prescription Drug</a>	

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.

Compare Plans		
	Sentara Vantage 10/20	Sentara Vantage 500/20/20%
Annual Deductible*	N/A	\$500/\$1,000
Out-of-Pocket Limit*	\$3,500/\$7,000	\$4,000/\$8,000
Primary Doctor Coverage*	\$10 Copay	\$20 Copay (Ded does not apply)
Specialist Coverage*	\$20 Copay	\$40 Copay (Ded does not apply)
Emergency Room Coverage*	\$350 Copay	30% Coins AD
Hospital Stay Coverage*	\$200 Copay per day/max \$800	20% Coins AD
Prescription Drug Coverage	CLS 10 BD; 45/75/20% AD w/\$300 max; 150 RX DED	CLS 10 BD; 45/75/20% AD w/\$300 max; 150 RX DED
> In Network		
> Out Of Network		





To choose a plan, click the **Select Prescription Drug** button.

**Plan Selection**

Please select at least one plan to proceed.

☐ Morbid Obesity Rider (MOR)

Product Type: --None-- Product Lines: --None-- Deductible: --None-- [Apply](#) [Compare](#) [Review Cart](#)

75 Available Plans

✓ **Standout Features**

ANNUAL DEDUCTIBLE N/A	OUT-OF-POCKET LIMIT \$3,500/\$7,000	PRIMARY DOCTOR COVERAGE \$10 Copay
SPECIALIST COVERAGE \$20 Copay	PRESCRIPTION DRUG COVERAGE CLS 10 BD; 45/75/20% AD w/...	EMERGENCY ROOM COVERAGE \$350 Copay
HOSPITAL STAY COVERAGE \$200 Copay per day/max \$800		

[Select Prescription Drug](#)

**Sentara Vantage 25/50** [Compare](#)

Select the prescription drug coverage and then click **Add to Cart**.

**Edit Sentara Vantage 10/20**

Family: Sentara Vantage  
Line of Business: Group Health

Configure Item Attributes

**Prescription Drug Coverage**

- ☒ CLS 10 BD; 45/75/20% AD w/\$300 max; 150 RX DED
- ☐ OPN 10 BD; 45/75/20% AD w/\$300 max; 150 RX DED
- ☐ CLS 15/40/75/20% w/\$300 max
- ☐ OPN 15/40/75/20% w/\$300 max

[Add to Cart](#)

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

Plan Selection

☐ Morbid Obesity Rider (MOR)

Product Type

--None--

Product Lines

--None--

Deductible

--None--

Apply

Compare

Review Cart ( 2 )

75 Available Plans

SPECIALIST COVERAGE

\$50 Copay

PRESCRIPTION DRUG COVERAGE

CLS 10 BD; 45/75/20% AD w/...

EMERGENCY ROOM COVERAGE

\$350 Copay

HOSPITAL STAY COVERAGE

\$300 Copay per day/max \$1,500

Select Prescription Drug

Sentara Vantage 500/20/20%

☒ Compare

Plan Details

Standout Features

ANNUAL DEDUCTIBLE

\$500/\$1,000

OUT-OF-POCKET LIMIT

\$4,000/\$8,000


PRIMARY DOCTOR COVERAGE

\$20 Copay (Ded does not apply)

## 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.



Review Selected Plans

### Review Selected Plans

[Medical Plans](#) [Edit Selections](#)

**Sentara Vantage Platinum 0 Ded**  
\$0.00/Mo

Annual Ded...	Out-of-Pock...	Primary Do...	Specialist C...	Prescription...	Emergency ...	Hospital Sta...
\$0/\$0	\$2,500/...	\$25 Copay	\$50 Copay	SG2025/...	30% Coi...	\$300 Co...

Prescription Drug Coverage: CLS 10/40/20%/20%: \$350 max

X Remove

**Sentara Vantage Platinum 0 Ded 100 Rx Ded**  
\$0.00/Mo

Annual Ded...	Out-of-Pock...	Primary Do...	Specialist C...	Prescription...	Emergency ...	Hospital Sta...
\$0/\$0	\$2,800/...	\$10 Copay	\$20 Copay	SG2025/...	\$350 Co...	\$400 Co...

Prescription Drug Coverage: CLS BD: 15/50 AD: 20%/20%: \$350 max: \$100 RX DED

✓

**Sentara Vantage Platinum 0 Ded 150 Rx Ded**  
\$0.00/Mo

Annual Ded...	Out-of-Pock...	Primary Do...	Specialist C...	Prescription...	Emergency ...	Hospital Sta...
\$0/\$0	\$3,000/...	\$15 Copay	\$35 Copay	SG2025/...	\$350 Co...	\$600 Co...

Prescription Drug Coverage: CLS BD: 10 AD: 40/20%/20%: \$350 max: \$150 RX DED

✓

Previous

Next

[Save for later](#)

## Document Upload

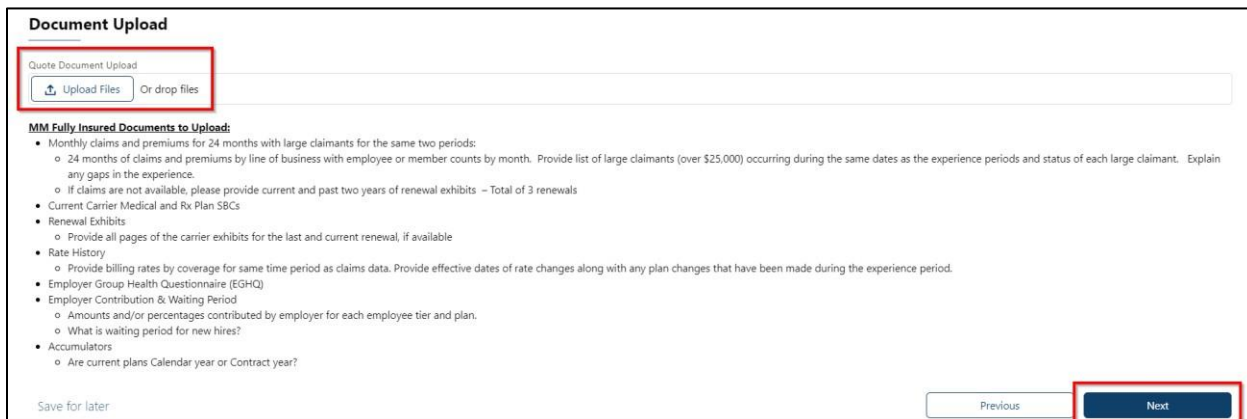
To upload necessary documentation for a Mid-Market quote, click **Upload Files** on the next screen and then click **Next**.

### List of Documents:

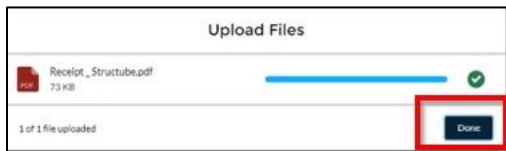
- Monthly Claims and premiums for 24 months with claimants for the same two periods.
- Current Carrier Medical and Rx Plan SBCs
- Renewal Exhibits
- Rate History
- Employer Group Health Questionnaire (EGHQ)
- Employer Contribution and Waiting Period
- Accumulators

The complete list and details are included on the Document Upload page.

Note: if all documentation is not available, the documents can be added at a later time on the Quote page in the Files Section.



The screenshot shows the 'Document Upload' interface. At the top, there is a 'Quote Document Upload' section with a red box around the 'Upload Files' button and the text 'Or drop files'. Below this, a section titled 'MM Fully Insured Documents to Upload:' lists the required documents: Monthly claims and premiums for 24 months with large claimants for the same two periods; Current Carrier Medical and Rx Plan SBCs; Renewal Exhibits; Rate History; Employer Group Health Questionnaire (EGHQ); Employer Contribution & Waiting Period; and Accumulators. At the bottom right, there are 'Previous' and 'Next' buttons, with the 'Next' button highlighted with a red box. A 'Save for later' link is also visible at the bottom left.



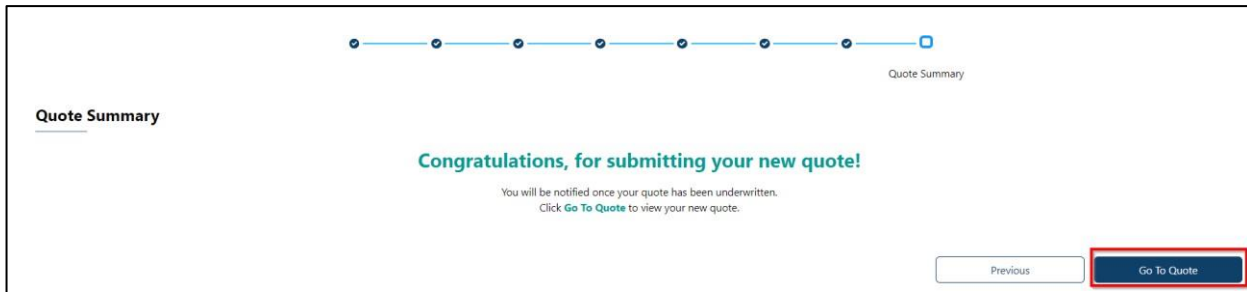
The screenshot shows the 'Upload Files' page. It displays a file named 'Receipt\_Structube.pdf' (73 KB) with a progress bar and a green checkmark. At the bottom right, there is a 'Done' button highlighted with a red box. The text '1 of 1 file uploaded' is visible at the bottom left.

Once documentation has been uploaded and you click **Done**.

## Congratulations, for submitting your new quote!

You have successfully submitted your new quote. You will be notified once your quote has been underwritten. Click **Go to Quote**.

**Note - You must click Go to Quote to save the quote.**

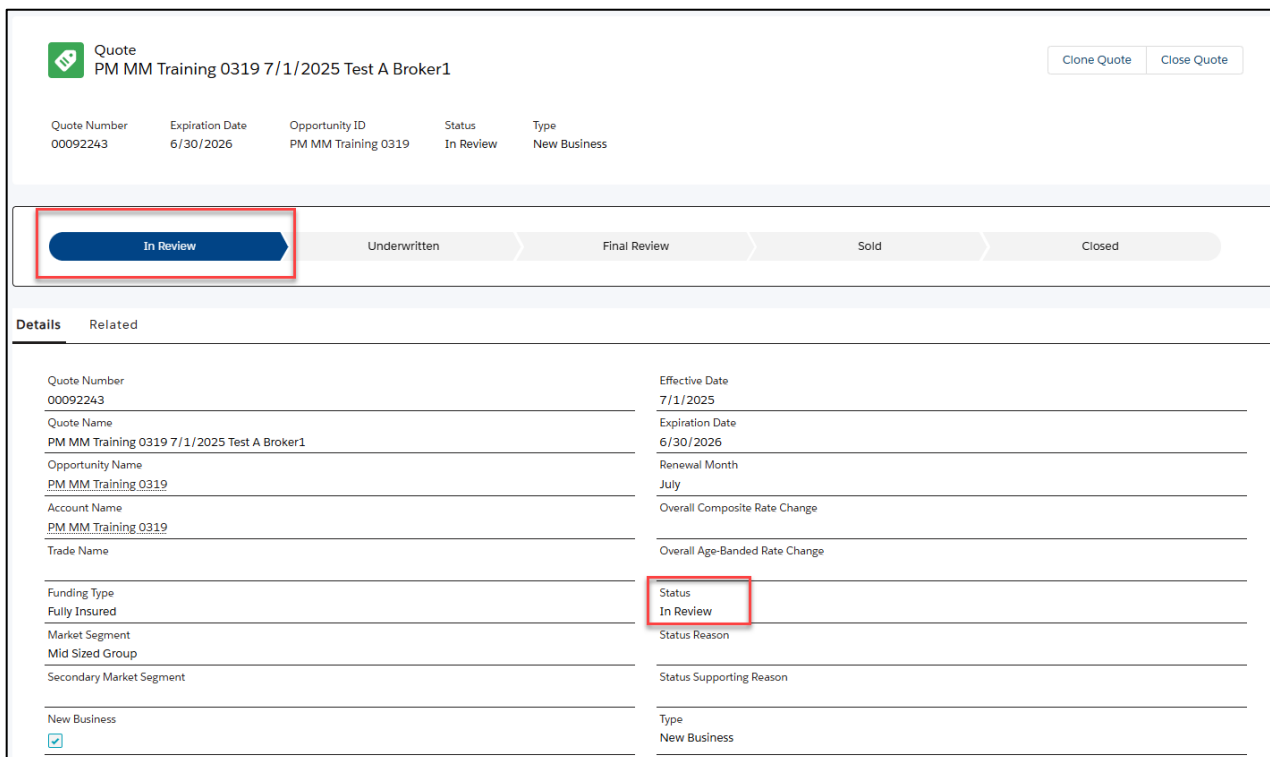


Quote Summary

**Congratulations, for submitting your new quote!**

You will be notified once your quote has been underwritten.  
Click [Go To Quote](#) to view your new quote.

Previous **Go To Quote**



Quote  
PM MM Training 0319 7/1/2025 Test A Broker1

Clone Quote Close Quote

Quote Number	Expiration Date	Opportunity ID	Status	Type
00092243	6/30/2026	PM MM Training 0319	In Review	New Business

**In Review** Underwritten Final Review Sold Closed

Details Related

Quote Number 00092243	Effective Date 7/1/2025
Quote Name PM MM Training 0319 7/1/2025 Test A Broker1	Expiration Date 6/30/2026
Opportunity Name PM MM Training 0319	Renewal Month July
Account Name PM MM Training 0319	Overall Composite Rate Change
Trade Name	Overall Age-Banded Rate Change
Funding Type Fully Insured	Status <b>In Review</b>
Market Segment Mid Sized Group	Status Reason
Secondary Market Segment	Status Supporting Reason
New Business <input checked="" type="checkbox"/>	Type New Business

The quote record has been completed, and notification has been sent to the Sentara Sales team and the Underwriting team that a Mid-Market quote has been created and requires underwriting. The status of the quote is in review. You will received notification when the quote and proposal are ready for review.

If additional documents need to be included for the quote, click the Related Tab, scroll to the File Section and select Upload Files to add additional documentation.

Quote Number  
00092243
Expiration Date  
6/30/2026
Opportunity ID  
PM MM Training 0319
Status  
In Review
Type  
New Business

In Review

Underwritten

Final Review

Sold

Closed

Details
Related

Quote Line Items (4)

Product

Pharmacy Code

Product Sub Type

Product Type

Sentara Vantage POSA 25/50 OPN 10 BD; 45/75/20% AD w/\$300 max; 150 RX DED	MM2025_OAC01A	POSA	Medical
Sentara Vantage 25/50 OPN 10 BD; 45/75/20% AD w/\$300 max; 150 RX DED	MM2025_OAC01A	HMO	Medical
Sentara Vantage POSA 10/20 CLS 10 BD; 45/75/20% AD w/\$300 max; 150 RX DED	MM2025_CAC03A	POSA	Medical
Sentara Vantage 10/20 CLS 10 BD; 45/75/20% AD w/\$300 max; 150 RX DED	MM2025_CAC03A	HMO	Medical

View All

Files (0)

Upload Files

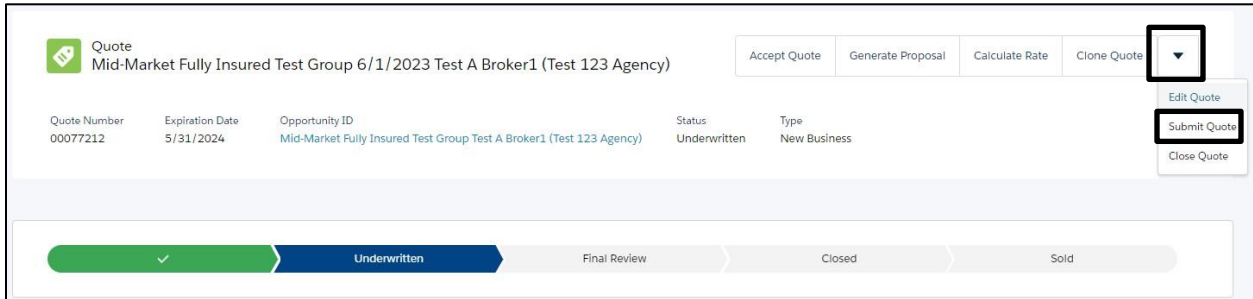
Or drop files

## Underwritten Quote

You will receive an email message when underwriting for the quote has been completed and the proposal document has been generated.

## Submit for a 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**.

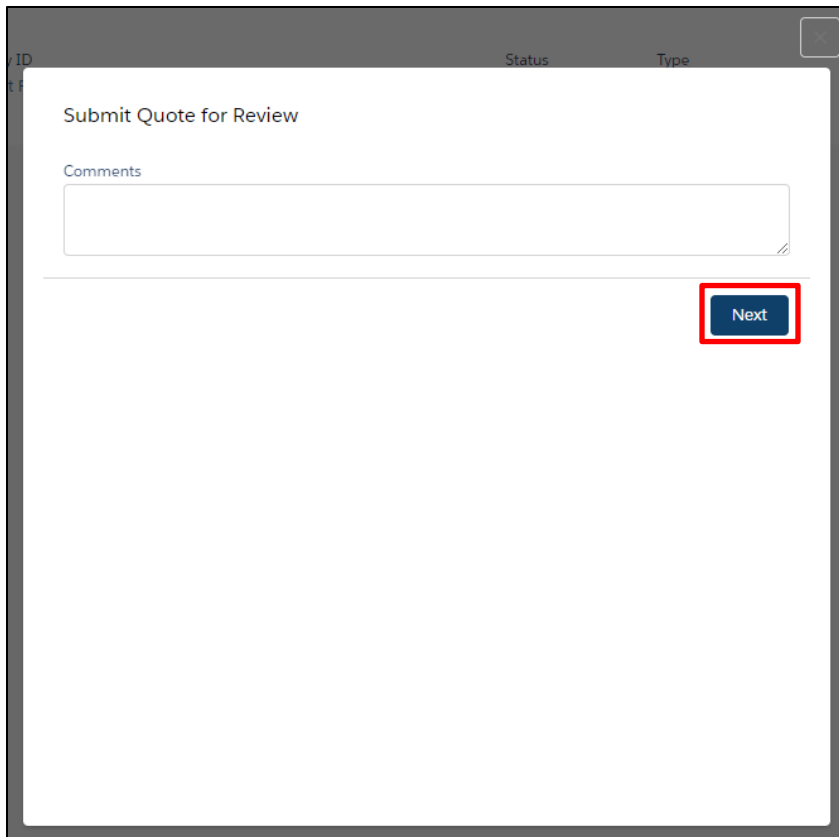


The screenshot shows a quote management interface. At the top, there's a quote header: "Quote Mid-Market Fully Insured Test Group 6/1/2023 Test A Broker1 (Test 123 Agency)". Below this, there are buttons: "Accept Quote", "Generate Proposal", "Calculate Rate", and "Clone Quote". A dropdown arrow is highlighted with a red box. Below the buttons, there's a table with 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's a progress bar with stages: "Underwritten" (highlighted in blue), "Final Review", "Closed", and "Sold". On the right side, there's a dropdown menu with options: "Edit Quote", "Submit Quote" (highlighted with a red box), and "Close Quote".

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



The screenshot shows a dialog box titled "Submit Quote for Review". It has a "Comments" section with a text area. Below the text area, there's a "Next" button highlighted with a red box.

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

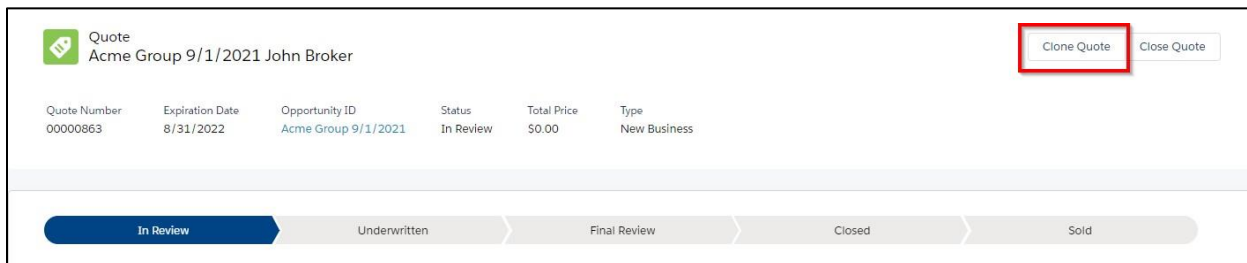


## Clone a Quote

The purpose of cloning a quote is so you can have multiple quotes under one opportunity. Cloning a quote allows you to apply different plans and funding types. Cloning will keep all the quotes grouped together under one opportunity.

A quote can be cloned from any status by clicking **Clone Quote**. Enter the **Effective Date** and **Plans** from the **Plan Selection** page to 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.

**\*Must be sent to UW for rates!!**



Quote  
Acme Group 9/1/2021 John Broker

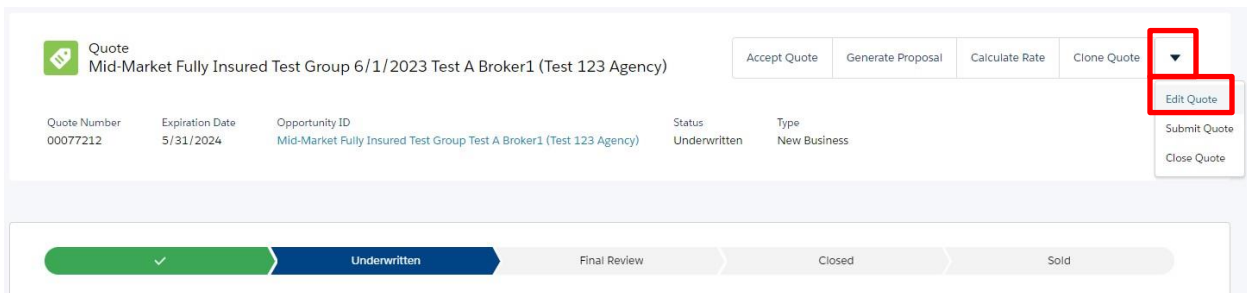
Quote Number: 00000863    Expiration Date: 8/31/2022    Opportunity ID: Acme Group 9/1/2021    Status: In Review    Total Price: \$0.00    Type: New Business

In Review    Underwritten    Final Review    Closed    Sold

## Edit a Quote

The purpose of editing a quote is to change plans on the quote. You cannot make any changes to the quote that will impact the rates.

Edit the quote by clicking the **Down Arrow** then select **Edit Quote**.



Quote  
Mid-Market Fully Insured Test Group 6/1/2023 Test A Broker1 (Test 123 Agency)


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

Accept Quote    Generate Proposal    Calculate Rate    Clone Quote    ▼

Edit Quote  
Submit Quote  
Close Quote

✓    Underwritten    Final Review    Closed    Sold

After you select your new plans and complete the quote process, calculate rates for your new plans, by clicking **Calculate Rate**. \*Update this screen


**Quote**  
 Mid-Market Fully Insured Test Group 6/1/2023 Test A Broker1 (Test 123 Agency)

Accept Quote
 Generate Proposal
 **Calculate Rate**
 Clone Quote
 ▼

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

Please Calculate Rates

✓

Underwritten



Final Review

Closed

Sold

Related

Details


**Quote Line Items (3)**


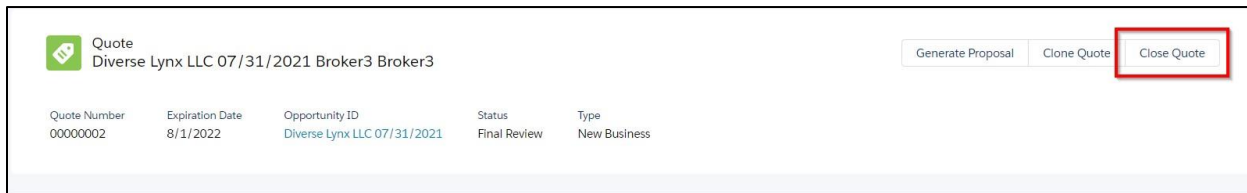
Product	Pharmacy Code	Product Type	Product Sub Type	Total Price	Alternate Plan
Optima Vantage POSA 25/50 CLS 10 BD; 45/75/20% AD; 150 RX DED	MM2023_CAC05A	Medical	POSA	\$0.00	<input type="checkbox"/>
Optima Plus Design 3000/25/20% CLS 10/40/60/20%	MM2023_CAC71A	Medical	PPO	\$0.00	<input type="checkbox"/>
Optima Vantage 6000/20% CLS 10 BD; 45/75/20% AD; 150 RX DED	MM2023_CAC11A	Medical	HMO	\$0.00	<input type="checkbox"/>

View All

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

## Close a Quote

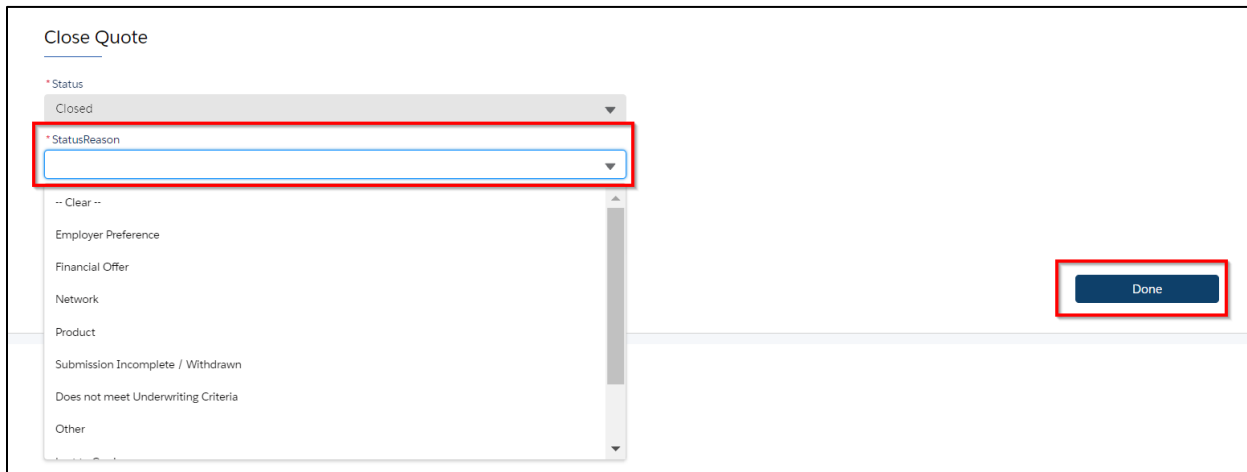
If a quote is not sold, close the quote by clicking **Close Quote**.



Quote Number	Expiration Date	Opportunity ID	Status	Type
00000002	8/1/2022	<a href="#">Diverse Lynx LLC 07/31/2021</a>	Final Review	New Business

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

If the status reason “Other” is selected, please provide a note detailing the reason in the Notes section.

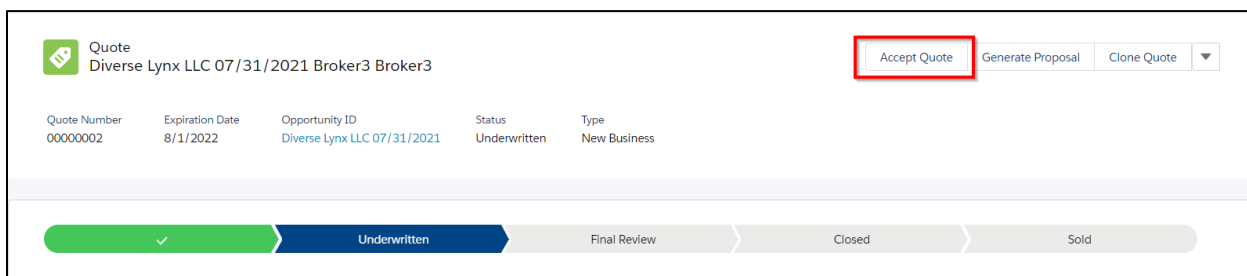


## Accept a Quote

\*Contact sales with an accepted quote

\*\*Ensure the plans on the quote are the ones that are sold. If multiple proposals.

To accept the quote, click **Accept Quote**, from the quote detail screen.



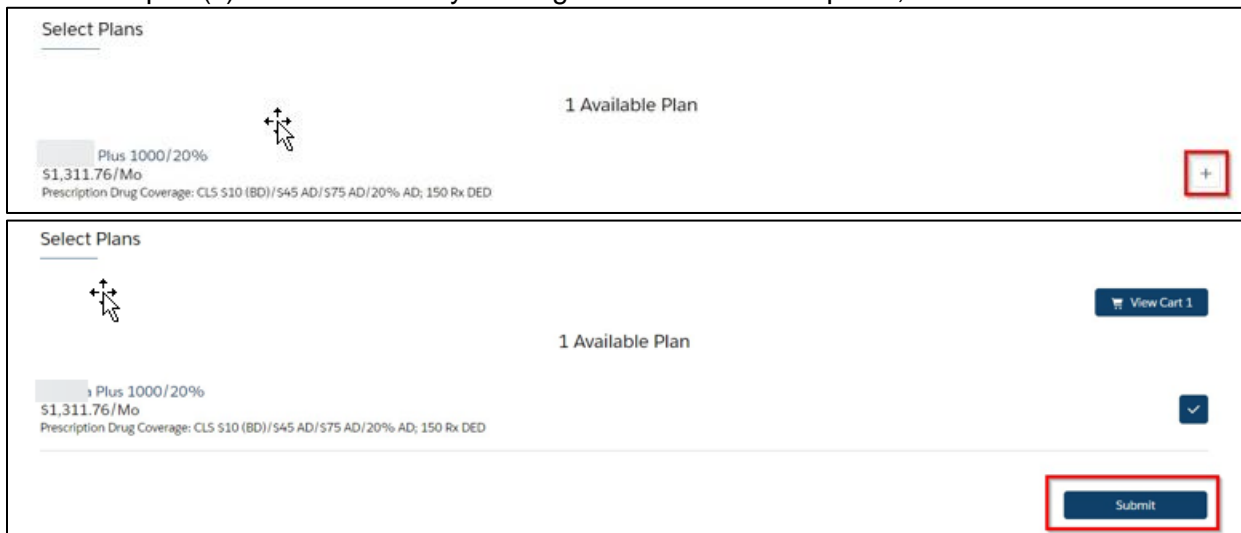
Quote  
Diverse Lynx LLC 07/31/2021 Broker3 Broker3

Accept Quote Generate Proposal Clone Quote ▼

Quote Number	Expiration Date	Opportunity ID	Status	Type
00000002	8/1/2022	Diverse Lynx LLC 07/31/2021	Underwritten	New Business

✓ Underwritten Final Review Closed Sold

Select the plan(s) that were sold by clicking the + button to add plans, and then click **Submit**.



Select Plans

1 Available Plan

Plus 1000/20%  
\$1,311.76/Mo  
Prescription Drug Coverage: CLS \$10 (BD)/\$45 AD/\$75 AD/20% AD; 150 Rx DED

+

Select Plans

1 Available Plan

Plus 1000/20%  
\$1,311.76/Mo  
Prescription Drug Coverage: CLS \$10 (BD)/\$45 AD/\$75 AD/20% AD; 150 Rx DED

View Cart 1

✓

Submit

Your Sentara Health Plans Sales Team will be notified that you accepted your quote, and you will start the group application process.

## Group Application Process

Edit Application

Mode of Eligibility ⓘ

--None--

✓ --None--

Web (Import or hand pick) / Spreadsheet

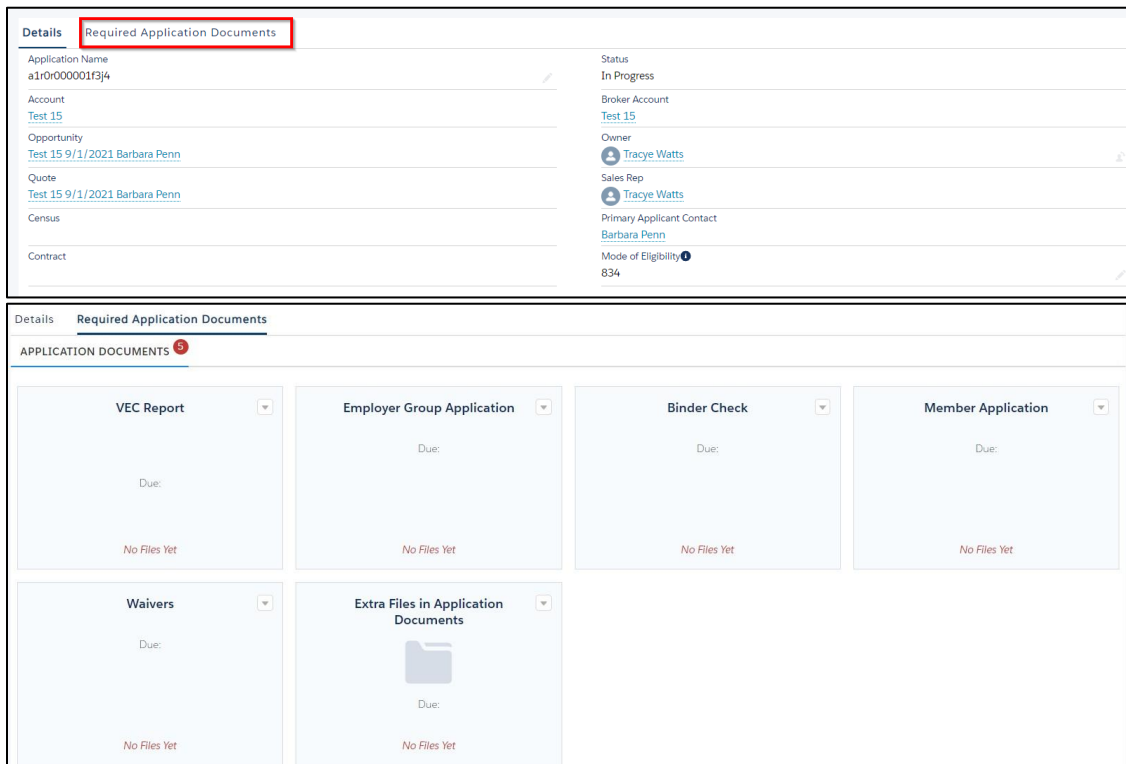
Paper / Manual

Cancel

Save

## Required Application Documents

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



**Details** **Required Application Documents**

Application Name: a1r0r000001f3j4

Account: [Test 15](#)

Opportunity: [Test 15 9/1/2021 Barbara Penn](#)

Quote: [Test 15 9/1/2021 Barbara Penn](#)

Census:

Contract:

Status: In Progress

Broker Account: [Test 15](#)

Owner: [Tracye Watts](#)

Sales Rep: [Tracye Watts](#)

Primary Applicant Contact: [Barbara Penn](#)

Mode of Eligibility: 834

**APPLICATION DOCUMENTS**

VEC Report Due: No Files Yet

Employer Group Application Due: No Files Yet

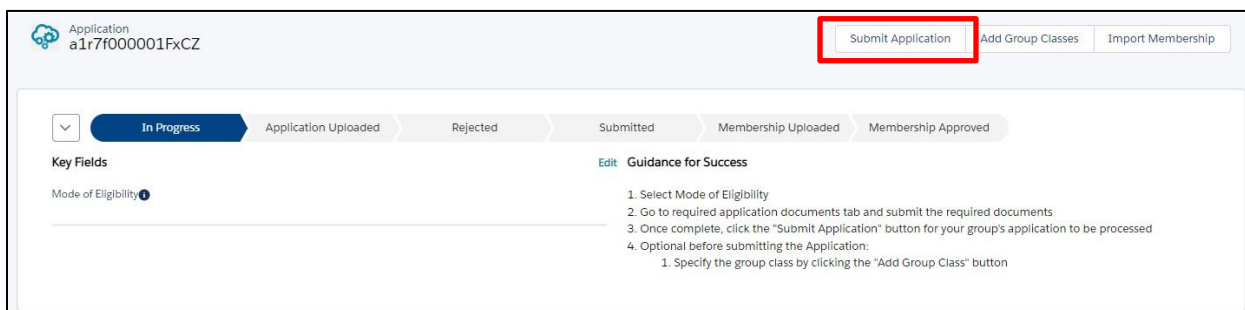
Binder Check Due: No Files Yet

Member Application Due: No Files Yet

Waivers Due: No Files Yet

Extra Files in Application Documents Due: No Files Yet

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



Application: a1r7f000001FxCZ

**Submit Application** Add Group Classes Import Membership

**Progress:** In Progress Application Uploaded Rejected Submitted Membership Uploaded Membership Approved


**Key Fields**

Mode of Eligibility: ⌵

**Guidance for Success**

1. Select Mode of Eligibility
2. Go to required application documents tab and submit the required documents
3. Once complete, click the "Submit Application" button for your group's application to be processed
4. Optional before submitting the Application:
  1. Specify the group class by clicking the "Add Group Class" button

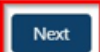
A message displays indicating your application was submitted and will notify your Sentara Health Plans Sales Team.

 **Submit Application**

Click Submit Application to submit your Group Application.

Upon submission, your required application documents will be reviewed. An  Health representative will be in touch shortly.

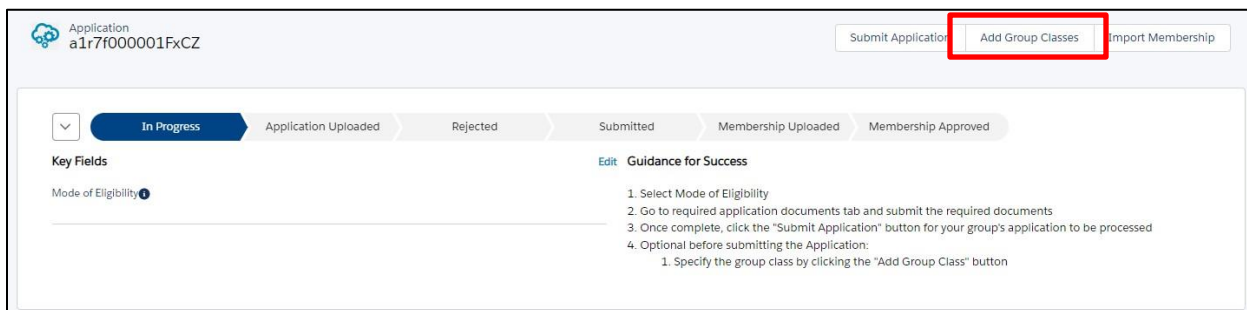
Thank you for choosing  Health!



## 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**



Application a1r7f000001FxCZ

Submit Application **Add Group Classes** Import Membership

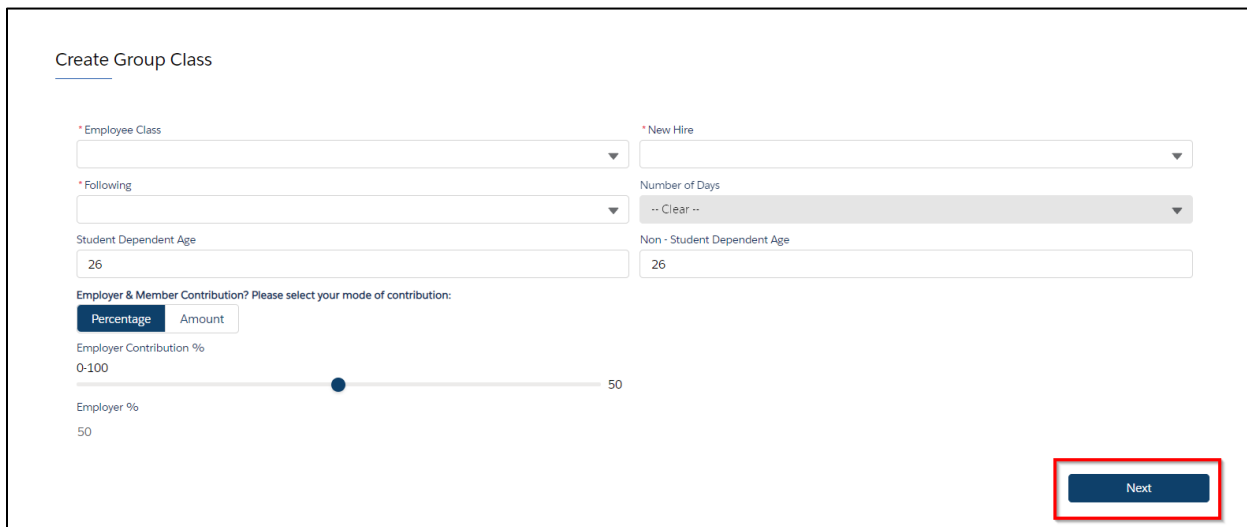
**In Progress** Application Uploaded Rejected Submitted Membership Uploaded Membership Approved

**Key Fields** [Edit](#) **Guidance for Success**

Mode of Eligibility ⓘ

1. Select Mode of Eligibility
2. Go to required application documents tab and submit the required documents
3. Once complete, click the "Submit Application" button for your group's application to be processed
4. Optional before submitting the Application:
  1. Specify the group class by clicking the "Add Group Class" button

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



Create Group Class

\* Employee Class \* New Hire

\* Following Number of Days

Student Dependent Age Non - Student Dependent Age

26 26

Employer & Member Contribution? Please select your mode of contribution:

Percentage Amount

Employer Contribution %

0-100

Employer %

50

**Next**

You will receive a message indicating your group class has been created. Click **Finish**.



Group Class Created

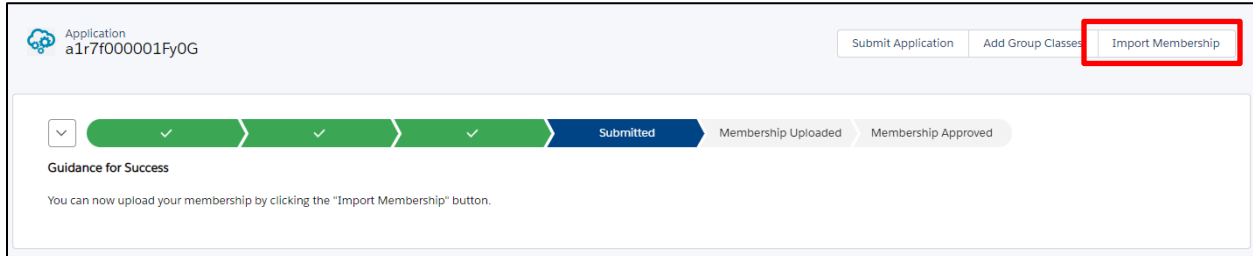
Group class has been created for Group **Test 15**

**Finish**



## Import Membership

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



Application a1r7f000001Fy0G

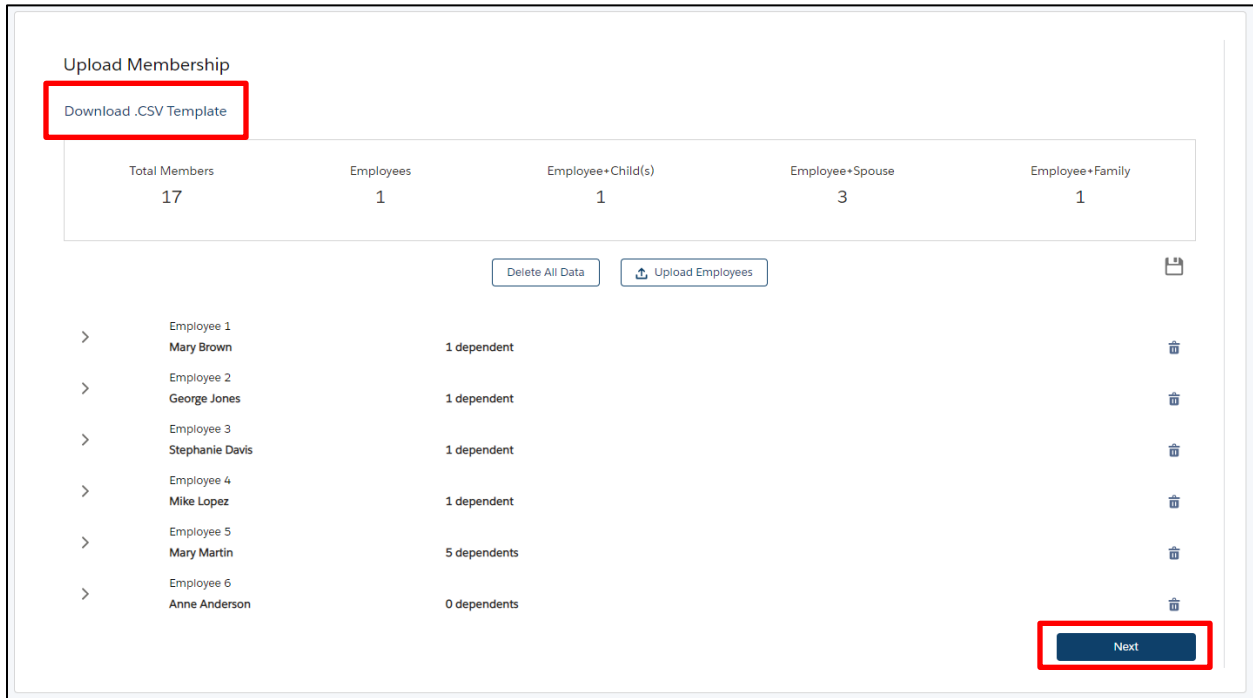
Submit Application Add Group Classes **Import Membership**

Submitted Membership Uploaded Membership Approved

Guidance for Success

You can now upload your membership by clicking the "Import Membership" button.

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



Upload Membership

**Download .CSV Template**

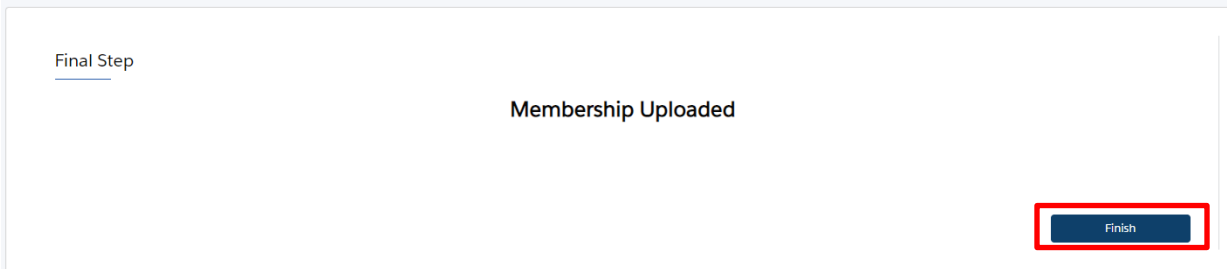
Total Members	Employees	Employee+Child(s)	Employee+Spouse	Employee+Family
17	1	1	3	1

Delete All Data Upload Employees

Employee	Dependents
Employee 1 Mary Brown	1 dependent
Employee 2 George Jones	1 dependent
Employee 3 Stephanie Davis	1 dependent
Employee 4 Mike Lopez	1 dependent
Employee 5 Mary Martin	5 dependents
Employee 6 Anne Anderson	0 dependents

**Next**

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

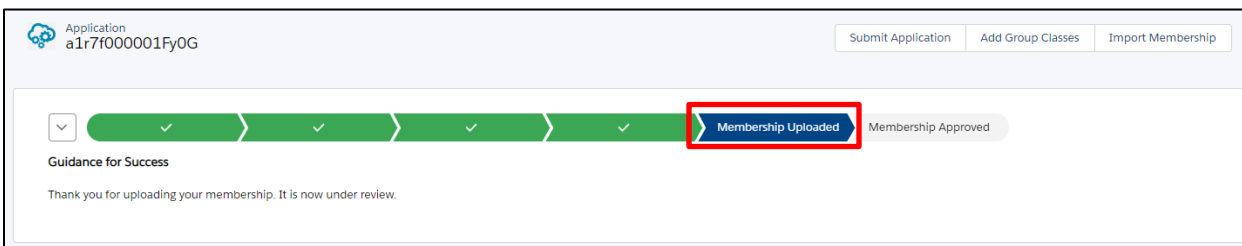


Final Step

Membership Uploaded

Finish

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



Application a1r7f000001Fy0G

Submit Application Add Group Classes Import Membership

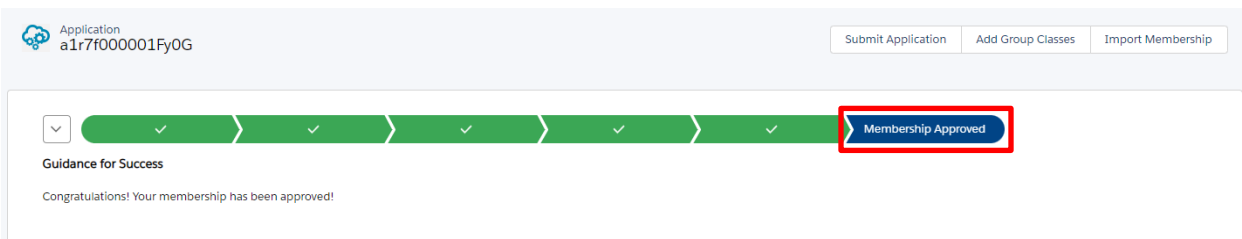
Membership Uploaded

Membership Approved

Guidance for Success

Thank you for uploading your membership. It is now under review.

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**.



Application a1r7f000001Fy0G

Submit Application Add Group Classes Import Membership

Membership Approved

Guidance for Success

Congratulations! Your membership has been approved!

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