Horizon BCBSNJ
Broker Portal
User Guide

VERSION 0.1
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1 Introduction

1.1 Overview

The broker portal is a Web-based application designed for the brokers, administrators and internal users to create and manage health, dental, and life plans of individuals and small groups. The main objective of this application is to streamline, simplify and standardize the online channel for brokers and internal users with industry-leading capabilities to cater to upcoming reforms.

1.2 Purpose

The broker portal user guide serves as a reference document for the brokers and other internal users of Horizon BCBSNJ. The document describes the features and functionalities of the portal in a task-based manner.

1.3 Intended Audience

The user guide is intended for the following users:

- Master Broker
- Broker
- Internal Users
- Sub-producers

1.4 Conventions Followed

The following conventions are used in this user guide:

- Names of all boxes such as text boxes, drop-down lists, date boxes, option buttons, and check boxes are capitalized to represent them as seen on the GUI. They are displayed in bold.
- Procedures are listed as numbered steps in the sequence in which the user action needs to be performed. Procedures with a single step are presented as a single bullet point and not as a numbered step.
- Notes have been indicated with a Note icon. Additional and important information about a screen or box is provided as a note in this format.
- Warning and cautions have been indicated by using the Caution icon. Any warning or precaution to be taken while performing a task is provided as a caution in this format.
- Tips have been indicated using the Tip icon. Alternative methods of performing a task are provided as a tip in this format.
1.5 Structure of Task-Based Sections

The sections in this user guide are task-based and structured in an easy-to-use format. Each section has an overview and subsections that include procedural information and box-level details. The overview explains the business reason and the high-level functionality of each section. The subsections explain the tasks that you can perform in the Broker portal. You can also refer the Contents to easily locate the specific task that you want to perform.

1.6 How to Use the Guide

The following guidelines explain how you can use this user guide:

- Read the entire user guide to gain a complete understanding of the applications that can be accessed by using the Horizon BCBSNJ Broker Portal.
- Look for the definition of terms and expansion of acronyms in the Glossary section.
- To learn how to perform a specific task, do the following steps:
  - Look for a task in the Contents section.
  - Go to the appropriate page of the task in the user guide.
  - Read the section overview to understand the task better.
  - Read the procedure to know how to perform the task.

1.7 Common Actions

You can perform the following actions in the Broker portal:

- **Save & Back to List**
  Saves the information on the current page and navigates back to the list.
- **Continue**
  Continues to the next page.
- **Cancel**
  Discards the changes made and navigates back to the list.
2 Getting Started

This chapter explains how to access the Broker portal. You need to enter your username and password to sign in to the Broker portal. The other functions include forgot username and forgot password.

2.1 Sign In

This section describes how to access the Broker portal.

To sign in

1. Start the browser.
2. In the address bar, type https://secure.horizonblue.com/broker/web/secure/brokers. The Sign In page is displayed.
3. In the Username box, type your username.
4. In the Password box, type your password.
5. Click Sign In.
2.1.1 Forgot Username

If you have forgotten your username, you can retrieve it in the **Forgot Username** page. There are two steps involved in this process:

- Step 1. Verify your identity.
- Step 2. Answer security question.

You need to complete both these steps to retrieve the username.

**To retrieve the username**

1. Start the browser.
2. In the address bar, type `https://secure.horizonblue.com/broker/web/secure/brokers`. The **Sign In** page is displayed.
3. In the **Please Sign In** section, click the **Forgot Username** link. The **Step 1 Verify Your Identity** section of the **Forgot Username** page is displayed by default.
4. In the First Name and Last Name boxes, type your first name and last name respectively.
   Example:
   Michael, not Mike
   Joseph, not Joe
5. In the Email Address box, type your e-mail address.
6. Select the required images.

   ![Select Images](image)

   **Figure 5. Select Images**

   If you do not select the images, the following message is displayed.

   ![Please select the images](image)

   **Please select the images**

7. Click Continue.

   ![Forgot Password](image)

   **Figure 6. Forgot Username: Verify Your Identity Details**

   The Step 2 Answer Security Question section is displayed.
8. In the Answer box of the Answer Security Question area, type the answer for the security question, and then click Continue.

The following message is displayed.

Figure 7. Forgot Username: Answer Security Question

Figure 8. Forgot Username: Answer Security Question Details

Figure 9. Forgot Username: Confirmation
2.1.2 Forgot Password

In the Forgot Password page, you can change or reset your password, if you have forgotten your existing password. There are three steps involved in this process:

- Enter your username
- Answer security question
- Change your password

You need to complete all these steps to change your password.

To change the password

1. Start the browser.
2. In the address bar, type https://secure.horizonblue.com/broker/web/secure/brokers. The Sign In page is displayed.

![Sign In Page](image)

Figure 10. Forgot Password: Sign In

3. In the Please Sign In section, click the Forgot Password link. The Step 1 Verify Your Identity section of the Forgot Password page is displayed by default.
4. In the **Username** box, type the username, select the required images, and then click **Continue**.

**Note**

Click the **Forgot Username** link, if you have forgotten your username. For more information, see **Forgot Username**.
Figure 12: Forgot Password: Verify Your Identity Details

The **Step 2 Answer Security Question** section is displayed.

Figure 13: Forgot Password: Answer Security Question

5. In the Answer box of the **Answer Security Question** area, type the answer for the security question, and then click **Continue**.
The Step 3 Change Your Password section is displayed.

6. In the **New Password** box, type the password.

   - Click ![icon] to view the password requirements. The password strength is displayed based on the password that you set.
   - Click the **Show Characters** link to view the password characters.

7. In the **Confirm New Password** box, retype the password, and then click **Submit**.
The following message is displayed.

![Forgot Password: Confirmation](image)

**Figure 17. Forgot Password: Confirmation**
3 Prospect Management

Prospects refer to prospective customers who avail health coverage options from Horizon Blue Cross Blue Shield of New Jersey (BCBSNJ). The customers include small groups (small companies/employers), and individual and family. The information that you gather for a prospect is part of the pre-sales exercise of Horizon BCBSNJ. In the Broker portal, prospects are classified into the following categories:

- Small Employer
- Individual & Family

**Users:** Master Broker, Broker, Internal Users, and Sub-producers

![Figure 18. Company Prospect: Quotes & Proposals Page]

<table>
<thead>
<tr>
<th>Customer Name</th>
<th>Customer ID</th>
<th>Address</th>
<th>Type</th>
<th>Last Updated</th>
<th>Status</th>
<th>Actions</th>
</tr>
</thead>
<tbody>
<tr>
<td>FRONTLINE</td>
<td>0407</td>
<td>100 New St, Nutley, NJ</td>
<td>S(1)</td>
<td>10/29/2013</td>
<td>Active</td>
<td>Q(2) P(0)</td>
</tr>
<tr>
<td>KRISH CHOPRA</td>
<td>8347</td>
<td>22 East Rd, Nutley, NJ</td>
<td>S(1)</td>
<td>10/27/2013</td>
<td>Active</td>
<td>Q(2) P(0)</td>
</tr>
<tr>
<td>WALT DISNEY</td>
<td>5344</td>
<td>25 Walnut St, Bloomfield, NJ</td>
<td>S(1)</td>
<td>10/27/2013</td>
<td>Active</td>
<td>Q(2) P(0)</td>
</tr>
<tr>
<td>DIT AAAAA</td>
<td>9250</td>
<td>10 Sherman Ave, Jersey City, NJ</td>
<td>S(2)</td>
<td>10/25/2013</td>
<td>Active</td>
<td>Q(1) P(0)</td>
</tr>
<tr>
<td>ANDREW FERNANDEZ</td>
<td>3188</td>
<td>58 Water St, Wayne, NJ</td>
<td>S(2)</td>
<td>10/25/2013</td>
<td>Active</td>
<td>Q(2) P(0)</td>
</tr>
</tbody>
</table>
3.1 Groups

A group refers to an employer or company. Groups include both small and large groups. A prospect that you create for a particular group is called a company prospect. For company prospects, you need to gather basic details such as employee base, address, or turnover ratio.

3.1.1 Search Company Prospect

You can search for a company prospect to view or update the details of the prospect. To search for a company prospect, you need to select the type of the prospect and type the keyword based on the search criteria that you selected.

To search for a company prospect

1. In the Broker portal menu, click Quotes & Proposals. The Quotes & Proposals page is displayed.
2. In the Prospect / Customer Type list, select Small Employer.

![Prospect / Customer Type List](image)

Figure 19. Search Company Prospect: Prospect/Consumer Type List

3. In the Status list, select the status (Active, Inactive, or Lost) of the prospect.

![Status List](image)

Figure 20. Search Company Prospect: Status List

4. In the Broker list, select the type of broker.
5. In the Keyword Search list, select the search criteria.

![Keyword Search List](image)

Figure 21. Search Company Prospect: Keyword Search List

6. In the Keyword Search box, type the keyword, and click Search. The search results are displayed.
3.1.2 Add New Company Prospect

You can add a new company prospect for a particular company, based on the details that you gathered from the company as part of the pre-sales exercise.

To add a new company prospect

1. In the Broker portal menu, click Quotes & Proposals. The Quotes & Proposals page is displayed.
2. In the Prospect list, select Small Employer.
3. Click Add New Prospect. The Customer Information tab is displayed.

![Image](image_url)

Figure 22. Add New Company Prospect

4. In the Company Name box, type the company name. The values in Group Number and Sub Group Number boxes are auto-populated, if available.
5. In the Customer Status list, select the status (Active, Inactive or Lost) of the customer.
6. In the Address Line 1, and Address Line 2, and Zip Code boxes, type the company address and zip code respectively.

The City box is auto-populated based on the zip code. The State box is not editable and is displayed as New Jersey by default.

The Address Verification service validates and stores the address in a standard format.

To validate the address

a. Click the Look Up SIC link. The Address Verification window is displayed.

b. Select the suggested address, and then click Use Selected Address.
Or

Click the **Edit** link against the respective address option.

![Address Verification](image)

**Figure 23. Address Verification**

7. In the **Standard Industry Code (SIC)**, type the SIC code of the company. Alternatively, click the **Look Up SIC** link to select the SIC code.

![SIC code note]

**Note:** SIC code is the industry code assigned to a company based on the nature of the business.

8. In the **Employee Turnover Ratio** list, select the turnover ratio of the company.

9. Select the **Medicare Secondary Rates** check box, if the group has 20 or more employees.

10. In the **Affiliate Name, No. of Employees, and No. of Insured Employees** boxes of the **Affiliate Information** area, type the affiliate name, number of employees, and number of insured employees, respectively.

![Affiliate Information]

**Figure 24. Enter Affiliate Information**

11. In the **Organization Type** list, select the type of organization.

12. In the **Nature of Business (SIC)** box, type the SIC code of the affiliate.

![Add another Affiliate link]

If you need to add more affiliate information for the prospect, click the **Add another Affiliate** link.
Figure 25. Customer Information: Affiliate Details

13. In the PPACA section, click Yes, only if the prospect has purchased an exchange-certified stand-alone dental plan.

```plaintext
The Patient Protection and Affordable Care Act (PPACA) permits plans outside of the Health Insurance Marketplace and the Small Employer Health Options Program (SHOP) to issue coverage without pediatric dental benefits only if reasonably assured that the applicant has purchased an exchange-certified stand-alone dental plan (SADP) covering the pediatric dental benefits as required by PPACA. In order to receive reasonable assurance from you, we require the following information:

☐ Yes, I have purchased an exchange-certified stand-alone dental plan.
☐ No, I have not purchased an exchange-certified stand-alone dental plan.

The Applicant attests that the above information is accurate and agrees to hold us harmless from any harm, monetary loss, or liability in connection with reliance on your representation. The Applicant also agrees that Horizon may require you to submit information demonstrating your coverage under an exchange-certified stand-alone dental plan and may request evidence of coverage and/or the name of the issuer and applicable policy number. The Applicant agrees to provide this information immediately upon request.
```

Figure 26. PPACA Section

14. In the Prefix and Suffix lists of the Company Contact Information area, select the prefix and suffix of the contact, respectively.
Figure 27. Enter Company Contact Information

15. In the First Name, Middle, Last Name, and Job Title boxes, type the first name, middle name, last name, and designation of the contact.

16. In the Email Address (primary) box, type the e-mail address of the contact.

17. In the Work Phone and Mobile Phone boxes, type the work phone and mobile phone numbers of the contact.

18. Click Save & Exit to Dashboard to save the company prospect and exit to dashboard.

Figure 28. Company Contact Details

19. Click Cancel, if you need to cancel the company prospect.

20. Click Next to Census, if you need to add the census information for the company.
3.1.3 Add Existing Company Prospect

You can use the existing company information to add a company prospect to your company list. The existing information refers to the public information such as company name, company address, group number, and sub group number that any other user has entered and saved in the portal. The affiliate and contact information are classified as private information, which you need to provide, based on the details that you gathered from the company.

To add an existing company prospect

1. In the Broker portal menu, click Quotes & Proposals. The Quotes & Proposals page is displayed.

2. In the Prospect list, select Small Employer.

3. Click Add New Prospect. The Customer Information tab is displayed.

4. In the Company Name box, type the first few letters of the company name. The matching company names and their address details are displayed as a list.

![Figure 29. Existing Company Names](image)

5. Select the company. The address details, SIC code and turnover ratio are auto-populated in the respective boxes. The values in Group Number and Sub Group Number boxes are auto-populated, if available. The State box is not editable and is displayed as New Jersey by default.

![Figure 30. Add Existing Company Prospect](image)

6. Complete steps 10 to 19, which are described in Add New Company Prospect to add affiliate and contact information.
3.1.4 Update Company Prospect

You can update or edit a company prospect, if there is any change in the information you provided for the prospect. The company name, group and sub group numbers are not editable. You can update or modify the address details, affiliate information, and contact information of the company.

To update a company prospect
1. In the Broker portal menu, click Quotes & Proposals. The Quotes & Proposals page is displayed.
2. Perform the steps that are described in Search Company Prospect to search for a particular prospect.
   Or
   If the prospect is already displayed in the list, select the customer name. The Customer Information tab is displayed.
3. Edit the required details, and click Save & Exit to Dashboard.

![Image of Quotes & Proposals page](image)

Figure 31. Update Company Information

3.2 Individual and Family

Individual & Family refers to the individual consumer. A prospect you create for a particular consumer is called consumer prospect. For consumer prospect, you need to gather basic details such as consumer name, date of birth, gender, address, and contact information.

3.2.1 Search Consumer Prospect

You can search for a consumer prospect to view or update the details of the prospect. To search for a consumer prospect, you need to select the type of the prospect as ‘Individual & Family’ and type the keyword based on the search criteria that you selected.

To search for a consumer prospect
1. In the Broker portal menu, click Quotes & Proposals. The Quotes & Proposals page is displayed.
2. In the Prospect / Customer Type list, select Individual & Family.
3. In the **Status** list, select the status (Active, Inactive, or Lost) of the prospect.

4. In the **Keyword Search** list, select the search criteria.

5. In the **Keyword Search** box, type the keyword, and click **Search**. The search results are displayed.

### 3.2.2 Add New Consumer Prospect

You can add a new consumer prospect to your list, based on the details that you gathered from the individual consumer as part of the pre-sales exercise.

**To add a new consumer prospect**

1. In the Broker portal menu, click **Quotes & Proposals**. The **Quotes & Proposals** page is displayed.
2. In the **Prospect** list, select **Individual & Family**.
3. Click **Add New Prospect**. The **Customer Information** tab is displayed.
Figure 35. Add New Consumer Prospect

4. In the **First Name**, **MI**, and **Last Name** boxes, type the consumer’s first name, middle initial, and last name, respectively.

5. In the **Prefix** and **Suffix** lists, select the prefix and suffix of the consumer.

6. In the **Customer Status** list, select the status (Active, Inactive or Lost) of the customer.

7. In the **Month**, **Day**, and **Year** lists of the **Birth Date** area, select the month, day, and year of birth of the individual consumer, respectively.

8. In the **Gender** list, select the gender.

9. In the **Address Line 1**, **Address Line 2**, **Zip Code**, and **City** boxes, type the company address, zip code, and city, respectively. The **State** box is not editable and is displayed as **New Jersey** by default.

10. In the **State** list, select the state in which the individual consumer is located.

   ![Note](Image)

   The Address Verification service validates and stores the address in a standard format.

11. In the **Email Address (Primary)** box, type the e-mail address of the contact.

12. In the **Home Phone**, **Work Phone** and **Mobile Phone** boxes, type the home phone, work phone, and mobile phone numbers of the contact.

13. Click **Save & Exit to Dashboard** to save the consumer prospect and exit to dashboard.
14. Click **Cancel**, if you need to cancel the consumer prospect.

15. Click **Next to Census**, if you need to add the census information for the consumer.

### 3.2.3 Add Existing Consumer Prospect

You can use the existing consumer information to add a consumer prospect to your list. The existing information refers to the public information such as customer name, date of birth, gender, and address details that any other user has entered and saved in the portal. The e-mail address and contact numbers are classified as private information, which you need to provide based on the details that you gather from the consumer.

**To add an existing consumer prospect**

1. In the Broker portal menu, click **Quotes & Proposals**. The Quotes & Proposals page is displayed.
2. In the Prospect list, select **Small Employer**.
3. Click **Add New Prospect**. The **Customer Information** tab is displayed.
4. In the **First Name** or **Last Name** boxes, type the first few letters of the individual consumer. The matching consumer names and their address details are displayed as a list.

![Figure 36. Existing Consumer Prospects](image-url)
5. Select the consumer name. The date of birth, gender, and address details are auto-populated in the respective boxes. The **State** box is not editable and is displayed as **New Jersey** by default.

6. Complete steps 11 to 12 described in **Add New Consumer Prospect** to add e-mail address and contact information.

### 3.2.4 Update Consumer Prospect

You can update or edit an individual consumer prospect, if there are any changes in the information that you provided for the prospect. The details that you can update or modify are date of birth, gender, address information, e-mail address, and contact information of the consumer.

**To update an individual consumer prospect**

1. In the Broker portal menu, click **Quotes & Proposals**. The **Quotes & Proposals** page is displayed.
2. Perform the steps that are described in **Search Consumer Prospect** to search for a particular prospect. Alternatively, if the prospect already appears in the list, select the customer name. The **Customer Information** tab is displayed.
3. Edit the required details, and click **Save & Exit to Dashboard.**

Figure 37. Consumer Information Details
4 Census Management

Census provides the personal information and health coverage options of employees, individual consumers, and their respective dependents. For employers or small groups, the census displays additional information that typically includes the number of employees, number of male employees, number of female employees, and their median age.

Users: Master Broker, Broker, Internal Users, and Subproducers

4.1 Company Census

Company census refers to the census information of employees who are associated with a particular company. The census information for a company provides information such as personal details and health coverage options selected for the employees and their respective dependents.

4.1.1 Search Employee

You can search for employees who are associated with a particular company and view or update the census information of employees and their dependents. To search for an employee, you need to select the keyword search criteria and then type the keyword, based on the search criteria that you selected. You can also search for an employee based on health/dental coverage options and the employee type.

To search for an employee

1. In the Broker portal menu, click Quotes & Proposals. The Quotes & Proposals page is displayed.
2. In the Prospects / Customers list, select the company prospect. The Customer Information tab is displayed by default.

![Note]

If the company prospect that you need to select is not available in the list, you can search for the prospect by using appropriate search criteria. For more information, see Search Company Prospect procedure.

3. Click the Census tab. The census overview information and the details of all employees associated with the company are displayed.

Figure 39. Company Census: Quotes & Proposals Page
4. In the **Keyword Search** list, select the search criteria.

   ![Keyword Search](image1)

   **Figure 41. Search Employee: Keyword Search List**

5. In the **Keyword Search** box, type the keyword.

6. In the **Health Coverage Type** list, select the health coverage option.

   ![Health Coverage Type](image2)

   **Figure 42. Search Employee: Health Coverage Type List**

7. In the **Dental Coverage Type** list, select the dental coverage option.
8. In the **Employee Type** list, select the employee type.

9. Click **Search**. The search results are displayed based on the criteria that you selected.

You can search for an employee by using any one or all of the search options described in steps 5 to 8.

### 4.1.2 Add Employee

You can add an employee to the list of employees of a particular company, based on the details that you gathered from the company. Along with the employee details, you can also add the dependent details (spouse and children), if applicable.

**To add an employee**

1. Perform steps 1 to 3 that are described in **Search Employee**.

2. Click **Add Employee**. The **Add/Edit Employee** page is displayed.
If there are no dependents for the employees, click the **Remove** link to remove the rows specific to the dependents.

3. In the **Health Coverage Type**, **Dental Coverage Type**, and **Employee Type** lists, select the health coverage, dental coverage, and the employee type, respectively.
   If you choose the employee type as ‘**Other**’, type the details in the box next to **Employee Type** list.

4. In the **Applicant** row of the **Applicant & Dependent Information** section, type the appropriate values in the following boxes:

   **First Name**
   First name of the employee

   **M.I.**
   Middle initial of the employee

   **Last Name**
   Last name of the employee

5. In the **Prefix**, **Suffix**, and **Gender** lists, select the prefix, suffix, and gender of the employee, respectively.

6. In the **Date of Birth** boxes, type the date of birth in MM/DD/YYYY format.

   For **Tobacco Use** and **Student Status** columns, the option ‘**No**’ is selected, by default.
7. In the **Spouse** and **Child** rows of the **Applicant & Dependent Information** section, type appropriate values in the following boxes:

- **First Name**
  First name of the dependent
- **M.I.**
  Middle initial of the dependent
- **Last Name**
  Last name of the dependent

8. Repeat steps 5 to 7 to complete the dependent information.

9. Click **Save & Back to List** to save the record and navigate to the employee list or click **Add Employee**, if you want to save the current record and add another employee to the list.

**Validations**

The validations for the Add Employee task are described in the following table.

<table>
<thead>
<tr>
<th>Validation Criteria</th>
<th>Message</th>
</tr>
</thead>
<tbody>
<tr>
<td>Dependent age is over 26.</td>
<td><img src="image" alt="Dependent is over the age limit (26). To enroll this dependent, please submit an application directly to Horizon BCBSNJ. You may also request to enroll this dependent as a Direct Pay individual within the same group. Dependent will be billed directly." /></td>
</tr>
<tr>
<td>Mandatory boxes are incomplete and you attempt to save the record.</td>
<td><img src="image" alt="Please check the fields that are mandatory/invalid" /> <strong>Applicant</strong>: First Name, Last Name, Month, Date, Year</td>
</tr>
<tr>
<td>Duplicates exist and you attempt to save the record.</td>
<td><img src="image" alt="Information" /> Possible duplicates exist for the record you are trying to add. Are you sure you want to continue? <strong>Yes</strong></td>
</tr>
</tbody>
</table>

Table 1. Add Employee Validations
4.1.3 Edit Employee

You can edit the employee information, if there is any change in the information that you provided about the employee and the associated dependents.

To edit an employee

1. Perform steps 1 to 3 that are described in Search Employee.
2. In the Employees section, click the Edit link in the respective employee record. The Add/Edit Employee page is displayed.

3. Edit the required details, and then click Save & Back to List.

4.1.4 Delete Employee

You can delete an employee from the list of employees, if the employee is no longer associated with the company for which the census is updated. If there are any dependents associated with the employee, the dependent information is also deleted along with the employee.

To delete an employee

1. Perform steps 1 to 3 that are described in Search Employee.
2. In the Employees section, click the Delete link in the respective employee record. The following message is displayed.

Figure 47. Edit Employee Page

Figure 48. Delete Employee Record Confirmation Box
3. Click Yes to delete the employee.

4.1.5 Remove Dependent

You can remove dependent, if the employee no longer needs insurance coverage for the dependent. The Remove link exists only for child records. After you click the Remove link, the respective child record is deleted. To delete the spouse information, you need to manually delete the information in the spouse record. In the case of spouse, the record exists and only the information is deleted.

To remove a dependent

1. Perform steps 1 to 3 that are described in Search Employee.
2. In the Employees section, click the Edit link in the respective employee record. The Add/Edit Employee page is displayed.

3. Click the Remove link in the respective dependent record.
4. Click Save & Exit to Dashboard.
4.1.6 Export Census

You can export the census information of a particular company and save it to your local drive for quick and easy reference. You can save the census file in the following formats:

- Spreadsheet
- CSV
- PDF

To export the census information

1. Perform steps 1 to 3 that are described in Search Employee.
2. Click the Export Census link. The Export Census dialog box is displayed.

   ![Figure 50. Export Census Dialog Box](image)

3. In the Select Format list, select the format (Spreadsheet, CSV, or PDF).

   ![Figure 51. Export Census: Select Format](image)

4. In the File Name box, type a name to save the file in a different name. The default file name appears in Prospect Name_Census_Date format. Click Export. The File Download dialog box is displayed.

5. Click Save. The Save As dialog box is displayed.
4.1.7 Import Census

You can import the census details of a particular company from your local drive into the application. The details are available in the spreadsheet format. The census file you create for a company needs to follow the standard template available in the application. For more information about the template, see Download Census Template.

To import the census information

1. Perform steps 1 to 3 that are described in Search Employee.
2. Click the Import Census link. The Import Census dialog box is displayed.

3. Click Browse to choose the file for import.
4. Click Overwrite to replace the existing employee records with the information in the file
   Or
   Click Append & Update to update the existing records and add new employee records to the list, if any.
5. Click **Import**. If the data in the file or the file you import is not in proper format, the following message is displayed.

![Figure 54. Incompatible Census Template Error](image)

**4.1.8 Download Census Template**

You can download the census template to fill in the census information for employees associated with a particular company. The census template provides a standard format to enter census information of employees and their respective dependents. The template is in spreadsheet format and is available as a link in the application.

**To download the census template**

1. Perform steps 1 to 3 that are described in **Search Employee**.
2. Click the **Download Census Template** link. The **File Download** dialog box is displayed.

![Figure 55. Census Template Download Dialog Box](image)

3. Click **Save**. The **Save As** dialog box is displayed.
4. Select the location in your local drive to save the file.
5. Click **Save**.

**4.2 Consumer Census**

Consumer census refers to the census information of individuals and their families. The census information for a company provides insight of the personal details and health coverage options that were selected for the individual consumers and their respective dependents.

**4.2.1 Add Dependent**

You can add spouse and children as dependents, if the consumer needs insurance coverage for dependents as well. To add dependents for a consumer, you need to first search for the consumer and navigate to the consumer census information.

**To add a dependent**
1. In the Broker portal menu, click **Quotes & Proposals**. The **Quotes & Proposals** page is displayed.

![Quotes & Proposals Page](image)

**Figure 56. Consumer Census: Quotes & Proposals Page**

2. Perform the steps that are described in **Search Consumer Prospect** to search for a particular prospect. Alternatively, if the prospect already appears in the list, select the customer name. The **Customer Information** tab is displayed.

3. Click the **Census** tab. The census information of the individual (consumer) and the dependents are displayed.
Figure 57. Consumer Census Information

4. In the PPACA section, click Yes, only if the prospect has purchased an exchange-certified stand-alone dental plan.

5. Click the + Add Dependent link. An additional row is displayed.

The row for spouse is displayed by default. You need to add a row only for the child dependent. First Name, Last Name, Gender, and Date of Birth are mandatory.

<table>
<thead>
<tr>
<th>Relationship</th>
<th>Prefix</th>
<th>First Name</th>
<th>M.I.</th>
<th>Last Name</th>
<th>Suffix</th>
<th>Gender</th>
<th>Date of Birth (MM/DD/YYYY)</th>
<th>Tobacco Use (Past 12 months)</th>
<th>Student Status (Exclude students)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Applicant</td>
<td>Mr.</td>
<td>Randy</td>
<td></td>
<td>Louden</td>
<td></td>
<td>M</td>
<td>07/19/1959</td>
<td>Yes</td>
<td>No</td>
</tr>
<tr>
<td>Spouse</td>
<td>Mrs.</td>
<td>Julie</td>
<td>Jett</td>
<td>Janet</td>
<td></td>
<td>F</td>
<td>05/02/1950</td>
<td>Yes</td>
<td>No</td>
</tr>
<tr>
<td>Child</td>
<td>Dr.</td>
<td>Daniel</td>
<td></td>
<td>Jones</td>
<td></td>
<td>M</td>
<td>10/08/2002</td>
<td>Yes</td>
<td>No</td>
</tr>
<tr>
<td>Child</td>
<td></td>
<td>Lathan</td>
<td></td>
<td>Jones</td>
<td></td>
<td>M</td>
<td>01/01/2010</td>
<td>Yes</td>
<td>No</td>
</tr>
</tbody>
</table>

Figure 58. Add Consumer Dependent

6. In the Relationship list, select the relationship type of the dependent.

7. In the Prefix list, select the prefix of the dependent.

8. In the First Name, M.I., and Last Name boxes, type the first name, middle initial, and last name of the dependent, respectively.

9. In the Suffix list, select the suffix of the dependent.

10. In the Gender list, select the gender of the dependent.

11. In the Date of Birth boxes, type the date of birth in MM/DD/YYYY format.

For Tobacco Use and Student Status columns, the option 'No' is selected by default.

12. Click Save & Exit to Dashboard.

Validations

The validations for the Add Dependent task are described in the following table.
### 4.2.2 Remove Dependent

You can remove dependent, if the consumer no longer needs insurance coverage for the dependent. The **Remove** link exists only for child records. After you click the Remove link, the respective child record is deleted. To delete the spouse information, you need to manually delete the information in the spouse record. In the case of spouse, the record exists and only the information is deleted.

**To remove a dependent**

1. In the Broker portal menu, click **Quotes & Proposals**. The **Quotes & Proposals** page is displayed.

2. Perform the steps that are described in **Search Consumer Prospect** to search for a particular prospect. Alternatively, if the prospect already appears in the list, select the customer name. The Customer Information tab is displayed.

3. Click the **Census** tab. The census information of the individual (consumer) and the consumer’s dependents are displayed.

4. Click the **Remove** link in the respective dependent record.

5. Click **Save & Exit to Dashboard**.
5 Quotes

A quotation (referred to as a quote, in short) provides the plan details that you select, based on the census information of a particular group or individual. For small groups, you can create the quote, based on the employee type and insurance LOBs such as health, dental, and life. In case of individuals, you can create the quote only based on the health and dental insurance LOBs.

Users: Master Broker, Broker, and Internal Users

Figure 60. Quotes Page

5.1 View Quote List

The Quotes page displays the list of quotes that you created for a particular group or individual. For each quote in the list, you can view the quote ID, plan name, the premium amount, effective date, status, last updated date, and actions. The actions associated with the quote are re-rate, copy, and delete. Furthermore, you can search for a quote, create a new quote, include a quote in a proposal, and submit a quote for enrollment and conversion.

The following Status Description table describes the different statuses of a quote.

<table>
<thead>
<tr>
<th>Status</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Active</td>
<td>The quote is active.</td>
</tr>
<tr>
<td>Active; In Proposal</td>
<td>The quote is active and included in the proposal.</td>
</tr>
<tr>
<td>Active; Ready to Submit for Enrollment</td>
<td>The quote is active and the proposal is approved by the group or individual.</td>
</tr>
</tbody>
</table>
Active; In Enrollment | The quote is active and submitted for enrollment.
Enrolled | The quote is enrolled.
Expired | The quote has expired.
Expired; In Proposal | The quote included in the proposal has expired.
Expired; Ready to Submit for Enrollment | The quote that is ready to submit for enrollment (proposal approved by the group or individual) has expired.
Expired; In Enrollment | The quote that is submitted for enrollment has expired.

Table 3. Quote Statuses

To view the quotes list

1. In the Broker portal menu, click Quotes & Proposals. The Quotes & Proposals page is displayed.

2. In the Prospects / Customers list, select the company prospect. The Customer Information tab is displayed by default.

   If the company prospect that you need to select is not available in the list, you can search for the company by using appropriate search criteria. For more information, see the Search Company Prospect procedure.

3. Click the Quotes tab. The Quotes page is displayed.
Alternatively, in the Quotes & Proposals page, you can click the ‘Q’ link in the respective record to navigate directly to the Quotes page.

Figure 62. Quotes Page

5.2 Search Quote - Group

You can search for a quote associated with a group, to view or update the details of the quote. To search for a quote, you need to select the required search criteria and type the keyword based on the search criteria that you selected. To make your search more effective, select the employee type, sale type, and status of the quote.

To search for a quote

1. Perform the steps that are described in View Quote List.
2. In the **Keyword Search** list, select the search criteria.

![Keyword Search](image)

**Figure 64. Search Group Quote: Keyword Search**

3. In the **Keyword Search** box, type the keyword.

4. In the **Employee Type** list, select the employee type.

![Employee Type](image)

**Figure 65. Search Group Quote: Employee Type**

5. In the **Sale Type** list, select the sale type.
6. In the **Status** list, select the status of the quote.

If you choose the status as **Active** or **Expired**, the **Sub Status** box is displayed.

7. In the **Sub Status** list, select the sub status of the quote.

8. Click **Search**. The search results are displayed based on the criteria that you selected.

You can search for a quote by using any one or all of the search options that are described in steps 5 to 10.
5.3 Search Quote - Individual

You can search for a quote associated with an individual, to view or update the details of the quote. To search for a quote, you need to select the required search criteria and type the keyword based on the search criteria that you selected. To make your search more effective, select the sale type and status of the quote.

To search for a quote

1. Perform the steps that are described in View Quote List.

![Figure 70. Search Individual Quote: Quotes Page](image)

2. In the Keyword Search list, select the search criteria.

![Figure 71. Search Individual Quote: Keyword Search](image)

3. In the Keyword Search box, type the keyword.

4. In the Sale Type list, select the sale type.
5. In the **Status** list, select the status of the quote.

If you choose the status as **Active** or **Expired**, the **Sub Status** box is displayed.

6. In the **Sub Status** list, select the sub status of the quote.

7. Click **Search**. The search results are displayed based on the criteria that you selected.

You can search for a quote by using any one or all of the search options described in steps 5 to 9.

### 5.4 View Quote

You can view the benefits and contract rate details of a particular quote that you created for a group or individual. The benefits summarize the In-Network and Out-of-Network benefits. The contract rate details provide rate details for medical, prescription, dental, and family. The benefits summary is applicable only for individuals.
5.4.1 View Quote - Group

This section describes the procedure to view the quote details for a particular group.

To view quote

1. Perform the steps that are described in View Quote List.

![View Group Quote: Quotes Page](image)

2. Click a Quote ID to view the contract rate details of the quote. The View Quote page is displayed with the contract details.
3. Click Single, 2Adults, Parent-child, or Family, to filter the employee list based on the insurance coverage type that you selected for each employee in the group. The medical, prescription, dental and family rates are displayed as applicable.

5.4.2 View Quote - Individual

This section describes the procedure to view the quote details for a particular individual.

To view quote

1. Perform the steps that are described in View Quote List.
2. Click a Quote ID to view the benefits and contract rate details of the quote. The View Quote page is displayed.
Create New Quote

You can create new quotes based on the census information that you gathered for a particular group or individual. There are three steps that you need to perform to create a new quote:

- Step 1: Enter Quote Information
- Step 2: Select Plans
- Step 3: View Quote Summary

Enter Quote Information

You can enter the quote details for different types of employees in a group and for individuals, based on the LOBs available in the portal. Entering the quote information is the first step in the process of creating a quote. The effective start date in the Quote Information screen is the date on which the insurance plan is activated.

To enter quote information

1. In the Broker portal menu, click Quotes & Proposals. The Quotes & Proposals page is displayed.

2. In the Prospects / Customers list, click the New Quote link against the respective customer prospect. The Quote Information page of the Quotes tab is displayed.
The Employee Type and Life LOB options are not available for individuals.

3. Click the calendar icon associated with the Effective Date boxes, and then select the effective date for the health plan. The date that you selected is displayed in the respective boxes in the mm/dd/yyyy format.

For HMO plans, the effective date needs to either be the first or fifteenth of every month.

4. In the Employee Type list, select the required employee types. The employee types include All Employees, Default, and Management.

5. In the Insurance LOBs to include in Quotes section, select the required LOBs check boxes. The displayed LOBs are Health, Dental, and Life.

The Life LOB is not available for individuals.

6. Click Yes, to include the base plan rates in the quote.

The base rate is displayed in the Quote Summary page, only for those plans in which you selected Health as one of the LOBs.

7. Click Next to Select plans to navigate to Select Plans page.
5.5.2 Select Plans

You can select health and dental plans for groups and individuals, and life plans only for groups based on the quote information that you entered. Selecting plans is the second step in the process of creating a quote. You can select plans only after you enter the quote information for a particular group or individual.

Before you create quote for a particular health, dental, or life plan, you can select one or more plans for comparison. In addition, you can manage your favorite plans and view the plan details too.

For more information on plan comparisons, see Compare Selected Plans.

For more information on favorite plans, see Manage Favorite Plans.

For more information on plan details, see View Plan Details.

To select plans

1. Perform the steps that are described in Enter Quote Information. The Select Plans page is displayed. The health plan list is displayed by default, if you selected health plan as one of the LOBs.

   Only the plans specific to the LOBs that you selected in the Quote Information page are displayed on the Select Plans page.

2. Click Create Quote against the respective health plan. The button caption changes to ‘Remove’.
In the health plans list, you can sort each column in alphabetical, high-to-low, or low-to-high order, based on the type of the column. The column names of health plans list are described in the following table.

<table>
<thead>
<tr>
<th>Column Name</th>
<th>Description</th>
<th>Type of Sort</th>
</tr>
</thead>
<tbody>
<tr>
<td>Plan Name</td>
<td>Name of the plan</td>
<td>Alphabetical</td>
</tr>
<tr>
<td>Plan Type</td>
<td>Type of the plan</td>
<td>Alphabetical</td>
</tr>
<tr>
<td>Deductible</td>
<td>Deductible amount for the plan</td>
<td>High-to-low or low-to-high</td>
</tr>
<tr>
<td>Coinsurance</td>
<td>Percentage of coinsurance (risk split among multiple parties) applicable to the plan</td>
<td>High-to-low or low-to-high</td>
</tr>
<tr>
<td>PCP Copay</td>
<td>Fixed dollar amount that the group or individual is liable to pay, in case of any visits to the Primary Care Physician (PCP)</td>
<td>High-to-low or low-to-high</td>
</tr>
<tr>
<td>Rx Copay</td>
<td>Dollar amount the group or individual is liable to pay in case of any prescription drugs</td>
<td>High-to-low or low-to-high</td>
</tr>
</tbody>
</table>

Table 4. Health Plans Column Names

3. Click **Next to Dental Plans**. The dental plans list is displayed.
In the dental plans list, you can sort each column in alphabetical or high-low and low-high order, based on the type of the column. The column names of dental plans list are same as health plans. The additional column in dental plans list is described in the following table.

<table>
<thead>
<tr>
<th>Column Name</th>
<th>Description</th>
<th>Type of Sort</th>
</tr>
</thead>
<tbody>
<tr>
<td>Out of Pocket Max</td>
<td>The maximum amount the group or individual needs to pay from their own pocket.</td>
<td>High-to-low or low-to-high</td>
</tr>
</tbody>
</table>

Table 5. Dental Plans Column Names

4. Click Create Quote against the respective dental plan. The button caption changes to ‘Remove’.
5. Click Next to Life Plans. The life plans list is displayed.

6. Click Create Quote against the respective life plan. The button caption changes to ‘Remove’.
Figure 87. Select Life Plans

In the life plans list, you can sort each column in alphabetical, high-to-low, or low-to-high order, based on the type of the column. The column names of life plans list are described in the following table.

<table>
<thead>
<tr>
<th>Column Name</th>
<th>Description</th>
<th>Type of Sort</th>
</tr>
</thead>
<tbody>
<tr>
<td>Plan Name</td>
<td>Name of the plan</td>
<td>Alphabetical</td>
</tr>
<tr>
<td>Benefit</td>
<td>Coverage amount for the plan</td>
<td>High-to-low or low-to-high</td>
</tr>
<tr>
<td>Dependent Life</td>
<td>Coverage amount for dependents</td>
<td>High-to-low or low-to-high</td>
</tr>
<tr>
<td>Monthly Benefit</td>
<td>Monthly coverage based on the type of plan</td>
<td>High-to-low or low-to-high</td>
</tr>
<tr>
<td>Duration</td>
<td>Period of coverage</td>
<td>High-to-low or low-to-high</td>
</tr>
</tbody>
</table>

Table 6. Life Plans Column Names

7. Click **Next to Quotes**.

**5.5.2.1 Compare Selected Plans**

You can select and compare up to three insurance plans at a time. The comparison details provide clarity on the type of plan you need to choose for a group or individual. Some of the details that aid in choosing the right plan are plan brochure and additional coverage options listed as part of In Network and Out of Network benefits. You can export the comparison details as a PDF file, download the plan brochure as a PDF file, and print the comparison details, if required.
To compare selected plans

1. Perform the steps that are described in Enter Quote Information. The Select Plans page is displayed.

![Select Plans Page](image)

Figure 88. Compare Selected Plans: Select Plans Page

2. Select the plans that you want to compare (select the check boxes in the respective plans).

<table>
<thead>
<tr>
<th>Note</th>
</tr>
</thead>
<tbody>
<tr>
<td>You can select maximum of three plans at a time for comparison.</td>
</tr>
</tbody>
</table>
3. Click Compare Selected Plans. The Compare Plans page is displayed. The In Network benefits are displayed by default. To view the out of network benefits, click Out of Network.

4. Click each plan name to view the plan details.

5. Click Create Quote in the respective plan to create a quote for that plan.

6. Click DownloadPDF in the respective plan to download the plan brochure as a PDF file.

7. Click the Export link to download the comparison details as a PDF file.

8. Click the icon to print the comparison details.
5.5.2.2 Manage Favorite Plans

For quick and easy access, you can add one or more plans that you frequently choose to create a quote to your favorite plans list. By creating your favorite plans list, you can save the time that you spend searching for plans. You can add maximum of five favorite plans for each plan type (Health, Dental, and Life) and update your plan list (add and remove plans).

To manage favorite plans

1. Perform the steps that are described in Enter Quote Information. The Select Plans page is displayed.

![Select Plans to Create Quotes](image)

Figure 91. Manage Favorite Plans; Select Plans Page

2. Click the Manage Favorite Plans link. The Manage Favorite Plans page is displayed.

<table>
<thead>
<tr>
<th>Note</th>
</tr>
</thead>
<tbody>
<tr>
<td>The Manage Favorite Plans page displays only those plan types that you selected in the Quote Information page. For more information, see Enter Quote Information.</td>
</tr>
</tbody>
</table>


3. Click the **HEALTH PLANS** link. The health plans are displayed in the **All Health Plans** list.

4. Move the pointer over the icon to view the plan summary, if required.

5. Click each plan to view the plan details, if required. For more information on plan details, see View Plan Details.

6. In the **All Health Plans** list, select the health plans that you want to add to your favorites list.
You can select a maximum of only five health plans.

Figure 94: Add Plans To Favorite List

7. Click Add. The health plans that you selected are displayed in the My Favorite Plans list.

Figure 95. Plans Added to Favorite List

8. Click the DENTAL PLANS link. The dental plans are displayed in the All Dental Plans list.
9. In the All Dental Plans list, select the dental plans you want to add to your favorites list.

You can select a maximum of only five dental plans.

10. Click Add. The dental plans that you selected are displayed in the My Favorite Plans list.

11. Click the LIFE PLANS link. The life plans are displayed in the All Life Plans list.

12. In the All Life Plans list, select the life plans you want to add to your favorites list.
You can select a maximum of only five life plans.

13. Click **Add**. The life plans that you selected are displayed in the **My Favorite Plans** list.

14. Click **Save**.

To remove plans from **My Favorite Plans** list, select the plan and click **Remove**.

---

**5.5.2.3 View Plan Details**

You can view the plan details before you create a quote for a particular group or individual. The plan provides information about various categories for which insurance is covered and the benefits of availing the plan.

In the **Plan Details** page, you can do the following:

- Export plan details as a PDF file.
- Download application forms relevant to the plan.
- View the benefits and coverage information.
- Print the plan details.

**To view plan details**

1. Perform the steps that are described in **Enter Quote Information**. The **Select Plans** page is displayed.
2. Click the plan for which you want to view the details. The Plan Details page is displayed. The Benefits at a Glance is displayed by default. To view the detailed information of the plan, click Plan Details.
3. Click the Export link to download the plan details as a PDF file.

4. Click to download the relevant forms required to apply for the particular plan.

5. Click to view a brief description of the plan benefits and the insurance coverage information.

6. Click the icon to print the plan details.

7. Click the Back To Plans link, if you need to navigate back to the Select Plans page.

8. Click the Previous Plan link to view the previous plan.

9. Click the Next Plan link to view the next plan.

10. Click Create Quote to create a quote for the plan that is displayed.

### 5.5.2.4 Quick Quote

In the Select Plans page, you can define your plan requirements based on the type of plan you are looking for and then select a plan from the list of plans that satisfies your requirements.

**To define a quick quote**

1. Perform the steps that are described in Select Plans. The Select Plans page is displayed.
2. In the **Quick Quote** section, click the drop-down arrow.

![Quick Quote section](image)

**Figure 101. Quick Quote**

3. In the **Plan Type** list, select the type of plan. The **Deductible** list appears editable and the plans are displayed based on the plan type that you selected.

![Plan Type selection](image)

**Figure 102. Quick Quote: Deductible**

4. In the **Deductible** list, select the deductible amount. The **Coinsurance** list appears editable and the plans are updated based on the deductible amount that you selected.
5. In the **Coinsurance** list, select the coinsurance amount. The **Generic Prescription Copay** list appears editable and the plans are updated based on the coinsurance that you selected.

6. In the **Generic Prescription Copay** list, select the prescription copay amount. The plans are updated based on the prescription copay amount that you selected.

### 5.5.2.5 Refine Results

The **Select Plans** page displays the list of all available plans. You can filter the list of plans based on two criteria: favorites and best sellers. The “Show My Favorites” option displays only those LOB plans that you have selected in **Manage Favorite Plans** and the “Best Sellers” option displays only the best seller plans within that LOB. You can further refine your search results by choosing other filter options such as plan type, deductible, coinsurance and copay.

**To refine results**

1. Perform the steps that are described in **Select Plans**. The **Select Plans** page is displayed.
Figure 105. Refine Results: Select Plans Page

2. In the **Refine Results** section, click the drop-down arrow. The filter options are displayed.

3. Select the appropriate filter options (checkboxes). The filter options include the following:
   - **Show My Favorites**
   - **Show Best Sellers**
   - **Plan Type**
   - **Deductible**
   - **Coinsurance**
   - **Generic Prescription Copay**
   - **PCP Copay**
   - **Max Out of Pocket**

   The plans are displayed based on the filter option(s) that you selected.
You can view the summary of health, dental, and life quotes that you selected for a particular group in the Select Plans page. As part of the quote summary, the contract rate details are displayed for each employee in the group.

In the Quote Summary page, you can perform the following:

- Edit quote information
- Select or remove plans from the health, dental, and life quotes
- View quote details (contract rate details)

**To view quote summary**

1. Perform the steps that are described in Select Plans. The Quote Summary page is displayed.
2. Click the **Edit** link in the **Quote Information** section to edit the quote information (effective date and employee type).

3. Click the **Edit** link in the **Health Quotes, Dental Quotes, and Life Quotes** sections, to add or remove quotes from the health, dental, and life quotes lists, respectively.

4. Click a quote to view the contract rate details of the quote. The **View Quote** page is displayed with the contract details.
5. Click **Single**, **2Adults**, **Parent-child** or **Family**, to filter the employee list based on the insurance coverage type that you selected for each employee in the group. The medical, prescription, dental, and family rates are displayed as applicable.

### 5.5.4 View Quote Summary - Individual

You can view the summary of health and dental quotes that you selected for a particular group in the **Select Plans** page. As part of the quote summary, the benefits (In network and Out of Network) and contract rate details are displayed for the individuals. In the **Quote Summary** page, you can perform the following:

- Edit quote information
- Select or remove plans from the health and dental quotes
- View quote details (benefits and contract rate details)

**To view quote summary**

1. Perform the steps that are described in **Select Plans**. The **Quote Summary** page is displayed.
2. Click the **Edit** link in the **Quote Information** section to edit the quote information.

3. Click the **Edit** link in the **Health Quotes** and **Dental Quotes** sections, to add or remove quotes from the health and dental quotes lists, respectively.

4. Click a quote to view the benefits and contract rate details of the quote. The **View Quote** page is displayed.
Compare Quotes

You can select and compare up to three quotes simultaneously. The comparison details provide clarity on the type of quote that you need to choose for a group or individual. Some of the information that aid in choosing the right quote are quote and contract rate details, plan details, and a summary of the In-Network and Out-of-Network benefits. You can also print or export the comparison details as a PDF file, if required.

To compare quotes

1. Perform the steps that are described in View Quote List.

Figure 110. View Quote Details: Individual
2. Select the quotes that you want to compare (by selecting the check boxes in the respective quotes).

The quotes that you select must be of the same LOB. If you select quotes from different LOBs, the following message is displayed.

![Please Select Quote Id of same LOB](image1.jpg)

You can select a maximum of three quotes at a time for comparison. If you select more than three quotes for comparison, the following message is displayed.

![Please select at least two quotes, but not more than three, for comparison](image2.jpg)
3. Click **Compare Quotes**. The **Compare Quotes** page is displayed. The **In Network** benefits are displayed by default. To view the out of network benefits, click **Out of Network**.

![Compare Quotes](image)

**Figure 113. Compare Quotes**

If you have selected only two quotes for comparison and need to select the third quote, click **Compare Another Quote**. The **Quotes** page is displayed, on which you can select the third quote for comparison.

4. Click the Quote ID to view the plan summary and contract rate details for individuals, and only the contract rate details for groups, if required.

5. Click the plan name to view the plan details, if required. For more information on plan details, see **View Plan Details**.

6. Click the **Export** link to download the comparison details as a PDF file.

7. Click the **Print** icon to print the comparison details.

### 5.7 Include in Proposal

You can include quotes in a proposal after you create the required quotes for a group or individual. The quotes that you select are automatically highlighted in the **Quotes Selection** page, on which you can either select or remove quotes.

**To include quotes in a proposal**

1. Perform the steps that are described in **View Quote List**.
2. Select the quotes that you want to include in a proposal (select the check boxes in the respective quotes).

You need to select at least one quote to include in a proposal. If you do not select at least one quote, the following message is displayed.

Please select at least one quote

You can select only quotes with ‘Active’, ‘Active; In Proposal’ and ‘Active; Ready to Submit for Enrollment’ status to include in a proposal. If you select any other quote, the following message is displayed.

Please Select a Valid Quote to Include in Proposal

3. Click Include in Proposal.

4. Perform the steps that are described in Create New Proposal.

5.8 Delete Quote

You can delete an active quote from the list of quotes, if you no longer require the quote. You cannot delete a quote, if the status of the quote is any of the following:

- In proposal
- Ready to submit for enrollment
- In enrollment
- Expired
- Enrolled
- Renewal

To delete a quote
1. Perform the steps that are described in View Quote List.

![Image of Quotes & Proposals](image)

**Figure 115. Delete a Quote: Quotes Page**

2. Click the Delete link in the respective quote record. The **Delete Quote** confirmation box is displayed.

![Image of Delete Quote](image)

**Figure 116. Delete Quote Confirmation**

3. Click Yes to delete the quote.

### 5.9 Copy Quote

You can copy a quote within a defined prospect and census. You can then create a new quote with the same data. Based on the original quote, the new quote is prepopulated with the same quote information (effective date, employee type, and LOBs) and the same plans that you selected in the original quote. You can modify the new quote based on the requirement of the group or individual. You cannot copy a quote, if the status of the quote is ‘Renewal’.

**To copy a quote**

1. Perform the steps that are described in View Quote List.
2. Click the Copy link in the respective quote record. The Quote Information page is displayed. The values are prepopulated from the original quote.

3. Edit the prepopulated information, if required.

**Note**

If the original quote expired, the effective date automatically changes to the next earliest effective date.
4. Click **Next to Select plans**. The **Select Plans** page is displayed highlighting the plans that you selected in the original quote.

![Select Plans Page](image)

**Figure 119. Copy Quote: Select Plans**

5. Select more plans or remove plans, if required, and then click **Next to Quotes**. The **Quote Information** page is displayed.

![Quote Information Page](image)

**Figure 120. Copy Quote: Quote Summary**

6. Click **Save & Back to List** to save the quote and navigate to the **Quotes** page.
5.10 Submit Quote for Enrollment

You can submit a quote for enrollment only after you include it in the proposal and obtain approval from the respective group or individual. After you receive the approval for the proposal, you need to manually change the status of the quote to “Ready for Enrollment”, before you submit the quote for enrollment. If the group or individual approves only a few quotes in the proposal, you need to create a new proposal with an updated quote list. Then, you need to resend it to the group or individual for approval.

To submit a quote for enrollment

1. Perform the steps that are described in View Quote List.

2. In the Status column, click the In Proposal drop-down against the quote that you need to submit for enrollment.

3. Click Ready to Submit for Enrollment.
Figure 122. Ready to Submit for Enrollment Drop-Down

The Proposal Status warning box is displayed.

Figure 123. Proposal Status Warning Box

4. **Click Submit.** The status of the quote changes to ‘Ready to Submit for Enrollment’.

Figure 124. Ready to Submit for Enrollment

5. **Select the quote that you want to submit for enrollment.**

You can submit only one health quote for individual and family enrollment. If you select more than one, the following message is displayed.
You can select only quotes with 'Active; Ready to Submit for Enrollment' status to submit for enrollment. If you select any other quote, the following message is displayed.

⚠️ Please select a valid quote to Submit for Enrollment

---

You can submit only one Health quote for Individual and Family enrollment.

---

6. Click Submit for Enrollment. The status of the quote changes to ‘In Enrollment’.

---

Figure 125. Select Quote to Submit for Enrollment

Figure 126. In Enrollment Status
6 Proposals

A proposal provides information about the quotes and associated plans that you selected for a particular group or individual. In addition, a proposal describes the premium that a group or an individual is liable to pay, based on the census information that you gathered for the group or individual. Premium value is based on the number of dependents that are associated with an employee or individual, their census information, and their use of tobacco.

**Users:** Master Broker, Broker, and Internal Users

---

![Proposals Page](image)

**Figure 127. Proposals Page**

### 6.1 View Proposal List

The Proposals page displays the list of proposals that you created for a particular group or individual. For each proposal in the list, you can view the proposal ID, proposal name, quotes, status (sent, not sent, and expired), the date on which you created the proposal, and actions. The actions associated with the proposal include send and copy. A proposal expires even if one quote in the proposal expires.

When you move the pointer over the quote icon ( ), the following details are displayed:

- Quote ID
- Employee Type
- Plan
- Monthly Premium
- Effective Date

There are three types of proposals: Regular, Renewal, and Conversion. The following table provides a brief description of each proposal.
Proposal Type | Description | Expiry Details
--- | --- | ---
Regular | A new proposal that is created with one or more quotes | A regular proposal expires, if any of the quotes in the proposal expires.
Renewal | A new proposal that is created to renew the quotes in the existing proposal | 
Conversion | A new proposal that is created with one or more conversion quotes | A conversion proposal expires when a conversion quote on the proposal expires.

Table 7. Types of Proposal

To view the proposal list

1. In the Broker portal menu, click **Quotes & Proposals**. The **Quotes & Proposals** page is displayed.

2. In the **Prospects / Customers** list, select the required prospect. The **Customer Information** tab is displayed by default.

   ![Figure 128. View Proposal List: Quotes and Proposals Page](image-url)

   If the prospect that you need to select is not available in the list, you can search for the company or consumer by using appropriate search criteria. For more information, see **Search Company Prospect** and **Search Consumer Prospect** procedures.

3. Click the **Proposals** tab. The **Proposals** page is displayed.
Alternatively, in the **Quotes & Proposals** page, click the ‘P’ link in the respective record to navigate directly to the **Proposals** page.

![Proposals List]

**Figure 129. Proposals List**

### 6.2 Search Proposal

You can search for a proposal that you created, and you can send the proposal to the respective group or individual for approval. In addition, you can make a copy of the proposal that already exists, and then edit the details as appropriate for a group or individual. You can search for a proposal by using either the proposal name, status, or both.

**To search for a proposal**

1. Perform the steps that are described in **View Proposal List**.
2. In the **Proposal Name** box, type the proposal name.
3. In the **Status** list, select the status of the proposal.
4. Click **Search**. The search results are displayed based on the search criteria that you selected.
6.3 Create New Proposal

You can create a new proposal with one or more quotes that are best suited for a particular group or individual based on the census information that you gathered. You need to perform three steps to create a new proposal:

- Step 1: Proposal Information
- Step 2: Select Quotes
- Step 3: Proposal Summary

6.3.1 Enter Proposal Information

Entering the proposal information is the first step in the process of creating a new proposal. For every proposal that you create, you need to provide the proposal information that includes the proposal name or title and the proposal contents.

To enter proposal information

1. Perform the steps that are described in View Proposal List.
2. Click Create New Proposal. The Proposal Information page of the Proposals tab is displayed.
3. In the **Proposal Name/Title** box, type the name or title of the proposal.

4. In the **Proposal Contents** section, select the contents (select the respective checkboxes) that you need to add to the proposal.

   The **Quote Details** check box appears selected by default. You cannot clear the check box selection.

The following table describes the proposal contents.
### Proposal Contents

<table>
<thead>
<tr>
<th>Description</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Cover Page</td>
<td>Cover page of the proposal that includes the group name, group address, contact person, agent name, broker contact, prospect ID and quote ID for each quote.</td>
</tr>
<tr>
<td>Welcome Letter</td>
<td>A letter inviting the group or individual to Horizon.</td>
</tr>
<tr>
<td>Quote Comparison</td>
<td>Comparison on the health plan information and contract details for a maximum of three quotes.</td>
</tr>
<tr>
<td>Premium Summary</td>
<td>Premium amount that the group or individual is liable to pay.</td>
</tr>
<tr>
<td>Census Information</td>
<td>Information about family and dependents.</td>
</tr>
<tr>
<td>Quote Details</td>
<td>Contract rate details for groups or individuals.</td>
</tr>
</tbody>
</table>

Table 8. Proposal Contents

5. Click **Next to Select Quotes** to navigate to the **Select Quotes** page.

### 6.3.2 Select Quotes

Selecting quotes is the second step in the process of creating a proposal. You can select quotes and then add them to the proposal, only after you provide the proposal information. Before you add the selected quotes to the proposal, you can compare the quotes to check on the benefits and health plan details. For more information on quote comparisons, see **Compare Quotes**.

**To select quotes**

1. Perform the steps that are described in **Enter Proposal Information**. The **Select Quotes** page of the **Proposal** tab is displayed.

![Select Quotes](Image)
2. Click **Add to Proposal**. The button caption changes to ‘**Remove**’.

![Figure 133. Select Quotes: Add to Proposal](image)

3. Click **Next to Summary** to navigate to the **Proposal Summary** page.

### 6.3.3 View Proposal Summary

The Proposal Summary page provides a brief summary of the proposal contents and quotes that you added, your contact, and the proposal title. You can view the proposal summary, only after you provide the proposal information and add the quotes to the proposal.

**To view the proposal summary**

1. Perform the steps that are described in **Select Quotes**. The **Proposal Summary** page is displayed.

![Figure 134. Proposal Summary](image)
2. Click the **Reorder Quotes** link to rearrange the order in which the quotes are displayed. For more information, see **Reorder Quotes**.

3. Click the quote ID to view the quote details. For more information, see **View Quote**.

4. Click **Save & Back to List** to save the proposal.
   Or
   Click **Send Proposal** to send the proposal to the respective group or individual for approval.

### 6.3.3.1 Reorder Quotes

In the **Proposal Summary** page, you can rearrange the order in which the quotes are displayed in a proposal. You can use the arrows (↓ and ↑) to move the quotes up and down as required.

**To reorder quotes**

1. Perform the steps that are described in **View Proposal Summary**. The **Proposal Summary** page is displayed.

2. Click **Reorder Quotes**. The **Reorder Quotes** page is displayed.

3. Click ↓ or ↑ to reorder the sequence of a quote.

4. Click **Save Order** to save the sequence of the quotes.

### 6.3.3.2 Edit Proposal

You can edit the proposal information, if required, before you send the proposal to the respective group or individual for approval. This section describes the procedure to edit the proposal information.

**To edit the proposal information**

1. Perform the steps that are described in **View Proposal Summary**. The **Proposal Summary** page is displayed.
2. Click the **Edit** link in the proposal information section to edit the proposal information.

The **Proposal Information** page of the **Proposals** tab is displayed.
3. Edit the proposal information (proposal title and proposal contents), and then click **Next to Select Quotes** to navigate to the Select Quotes page.

4. Remove or add quotes to the proposal, if required and then click **Next to Summary**.

### 6.3.3.3 Edit Quotes

You can make changes to the quotes that you added to the proposal, if required, before you send the proposal to the respective group or individual for approval. This section describes the procedure to make changes to the selection of quotes that you added to the proposal.

**To edit the quotes**

1. Perform the steps that are described in View Proposal Summary. The Proposal Summary page is displayed.
2. Click the **Edit** link in the **QUOTES** section to make changes to the selection of quotes that you need to add to the proposal.

The **Select Quotes** page is displayed.
3. Remove or add quotes to the proposal as appropriate, and then click Next to Summary.

6.4 Send Proposal

After you create a proposal, you need to send the proposal to the respective group or individual for approval. The proposals that you created and saved exist in the proposal list. This section describes the procedure to send a proposal.

To send a proposal

1. Perform the steps that are described in View Proposal Summary. The Proposal Summary page is displayed.

Figure 142. Proposal Summary: Send Proposal
2. Click **Send Proposal**. The **Send Proposal** page is displayed.

![Send Proposal Page](image)

**Figure 143. Send Proposal**

3. In the **Email To** box, type the e-mail address of the group or individual.
4. In the **Bcc** box, type the e-mail address of the recipient to whom you want to send a blind carbon copy.
5. In the **Subject** box, type the proposal subject.
6. In the **Message** box, type the proposal message.
7. Select the attachments that you need to include for the proposal.
8. Click **Send Proposal**.

### 6.5 Copy Proposal

You can copy a proposal for a respective group or individual, if you plan to have the same contents with minimal modifications for the new proposal. After you copy a proposal, you can edit the proposal contents and make changes to the selection of quotes, if required. This section describes the procedure to copy a proposal.

**To copy a proposal**

1. Perform the steps that are described in **View Proposal List**. The **Proposals** page is displayed.

![Proposals: Copy Proposal](image)

2. Click the **Copy** link in the respective proposal record. The **Proposal Information** page is displayed. The values are prepopulated from the original proposal.

![Proposal Information](image)
Figure 145. Prepopulated Proposal Information

3. Edit the prepopulated information, if required.

4. Click Next to Select Quotes. The Select Quotes page is displayed, highlighting the quotes that you selected in the original proposal.

![Select Quotes page](image)

Figure 146. Copy Proposal: Select Quotes

5. Select more quotes or remove quotes, if required and then click Next to Summary. The Proposal Summary page is displayed.

![Proposal Summary page](image)

Figure 147. Copy Proposal: Proposal Summary

6. Click Save & Back to List to save the proposal and navigate to the Proposals page.
7 Enrollment – (IN PRODUCTION – NON FUNCTIONING)

This function is under construction and will be available at a later date
8 Renewals

The Renewals module deals with the renewal opportunities for subgroups. A subgroup is a combination of health and dental products assigned to one or more subscribers of the group. You can have a maximum of three health and two dental products associated with a subgroup. The flat file contains the list of groups and associated subgroups that are due for renewal. The renewals are done only at the subgroup level. The portal notifies the groups and subgroups that are due for renewal 60 days prior to the renewal date. Before you renew a subgroup, you need to contact the group to which you have associated the subgroup, get approval on the new rates, and then submit the renewal opportunity.

Users

Internal User, Renewals Manager, and Renewals Processor

Figure 148. Renewals Landing Page

8.1 Load Data

This section describes how to upload and process group and subscriber data, and download data report. The group and subscriber data are available in the respective flat files.

8.1.1 Upload and Process Group and Subscriber Data

You can import the group and the respective subscriber flat files that contain renewal information, and upload the flat files as part of the renewal process. The group flat file contains the group information and the subscriber flat file contains the subscriber information (employees of the group or company).

To upload group and subscriber data

1. In the Broker portal menu, click Renewals. The Load Data page of the Group Data tab is displayed.
2. In the **Group Data: Import from a Flat File** area of the **Load Data** section, click **Browse**. The **Choose File to Upload** dialog box is displayed.

3. Select the flat file and then click **Open**.

4. In the **Subscriber Data: Import from a Flat File** area of the **Load Data** section, click **Browse**. The **Choose File to Upload** dialog box is displayed.

5. Select the flat file and then click **Open**.

6. Click **Upload & Process** to process the flat files. The following message is displayed.

   ![Message](image)

   **Figure 150. Upload and Process Data**

### Validations

<table>
<thead>
<tr>
<th>Validation Criteria</th>
<th>Message</th>
</tr>
</thead>
<tbody>
<tr>
<td>No group or member flat files selected.</td>
<td><img src="image" alt="Tip" /> Please specify a path name or select one via the Browse button</td>
</tr>
<tr>
<td>Flat files are not available in the specified location.</td>
<td><img src="image" alt="Tip" /> No files in the specified path.</td>
</tr>
<tr>
<td>File name format is incorrect.</td>
<td><img src="image" alt="Tip" /> We're unable to load the file. Please ensure each line has the correct format</td>
</tr>
</tbody>
</table>

**Table 9. Validation Group Data**
8.1.2 Download Data Report

You can download and view the data reports generated as part of the flat file upload process to check for any orphan or duplicate reports for group and subscribers. The following table provides a brief description of each type of report.

<table>
<thead>
<tr>
<th>Report</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Orphan Group Report</td>
<td>Subgroups that have no subscriber and dependent records</td>
</tr>
<tr>
<td>Orphan Subscriber Report</td>
<td>Subscriber records that are not associated with any group</td>
</tr>
<tr>
<td>Duplicate Group Report</td>
<td>List of groups that are repeated in a group file</td>
</tr>
<tr>
<td>Duplicate Subscriber Report</td>
<td>List of subscribers that are repeated within a group</td>
</tr>
</tbody>
</table>

Table 10. Report Descriptions

To download and view data report

1. Perform the steps that are described in Upload and Process Group and Subscriber Data.
2. In the Load Data Report section, do the following.
   a) Click the Click here to download Orphan Group report link to view the orphan group details.
   b) Click the Click here to download Orphan Subscriber report link to view the orphan subscriber details.
   c) Click the Click here to download Duplicate Group report link to view the duplicate group details.
   d) Click the Click here to download Duplicate Subscriber report link to view the duplicate subscriber details.

8.2 Subgroups

A subgroup comprises a set of subscribers who are tagged to a particular group. This section describes how to view, add, edit, and delete subgroups.

8.2.1 Search Subgroup

You can search for a subgroup to add, edit, delete, and validate subgroups. To search for a subgroup, you need to enter the relevant search values in any one or more of the following boxes:

- Group Name
- Group ID
- Original Coverage Code
- New Coverage Code
- Broker ID
- Anniversary Date

To search a subgroup

1. In the Broker portal menu, click Renewals. The Load Data page of the Group Data tab is displayed.
2. Click the Sub-group link. The Sub-group page is displayed.
3. In the Anniversary Date list boxes, select the month and year.
4. Type or select appropriate values in any one or more of the following boxes:
   - Group Name
   - Group ID
   - Original Coverage Code
   - New Coverage Code
   - Broker ID
5. Click Search. The search results are displayed based on the search values that you entered.

The first four characters of the group number represent the group number and the remaining characters represent the subgroup number.
In the Sub-group Data list, the highlighted rows indicate that the validation has failed for the respective subgroups. The Error Status column displays the relevant errors. For more information on error code descriptions, see Table 11. Error Descriptions: Validation.

The following table describes the different statuses associated with the subgroup.

<table>
<thead>
<tr>
<th>Status</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Error Status</td>
<td>Describes the error, if any, associated with the subgroup. Example:</td>
</tr>
<tr>
<td></td>
<td>![Error Status Box]</td>
</tr>
<tr>
<td></td>
<td>Error Codes</td>
</tr>
<tr>
<td></td>
<td>RE: Rates Not Available</td>
</tr>
<tr>
<td>Needs Validation</td>
<td>Subgroups that are pending for validation.</td>
</tr>
<tr>
<td>Validated</td>
<td>Products associated with the subgroups are validated.</td>
</tr>
<tr>
<td>Processed</td>
<td>Product renewal is processed.</td>
</tr>
<tr>
<td>Quotes Released</td>
<td>Renewal or conversion quote is created as part of the renewal process.</td>
</tr>
<tr>
<td>Package Generated</td>
<td>Renewal proposal is created as part of the package generation process.</td>
</tr>
<tr>
<td>Undo</td>
<td>The process of validation, renewal, and package generation is undone.</td>
</tr>
</tbody>
</table>

### 8.2.2 Add New Subgroup

You can create subgroups and tag them to groups that you have created. When creating a subgroup, you also need to provide the details of the broker assigned to the subgroup.

To add a subgroup, do the following:

1. **Step 1.** Enter subgroup details.
2. **Step 2.** Enter broker details.

#### 8.2.2.1 Subgroup Details

Entering the subgroup details is the first step in the process of adding or creating a subgroup. In the Subgroup Details page, you need to enter the group, subgroup and product information of the subgroup.
To enter the subgroup details

1. Perform the steps that are described in Search Subgroup.
2. Click Add New Sub-group.

Alternatively, on the Subscriber and Dependent pages, you can add a new subgroup.

To add a new subgroup on the Subscriber page, perform the steps that are described in View Subscribers, and then click Add New Sub-group.

To add a new subgroup on the Dependent page, perform the steps that are described in View Dependents, and then click Add New Sub-group.

The Subgroup Details section of the Add Subgroup page is displayed.

3. In the Group ID box, type the group ID. The group name, address, city, state, zip code, and phone number information are auto-populated, based on the group ID you provided.

4. In the Subgroup ID and Subgroup Name boxes, type the subgroup ID and subgroup name, respectively.

5. In the Subgroup Status option, click Active, only if the status of the subgroup is active. Otherwise, click Termed.

6. In the Date for Renewal area, click the date picker icon, and then select the renewal date for the subgroup.
7. In the **Medical Coverage Code** and **Rx Coverage Code** boxes, type the medical coverage code and Rx coverage code, respectively.

8. In the **Product Override** area, click the suitable option.

![Subgroup Details Data](image)

**Figure 154. Subgroup Details Data**

9. Click **Save & Back to List** to save the subgroup information. The following message is displayed.
Click Broker Details to navigate to the Broker Details page.

8.2.2.2 Broker Details

Retrieving broker details is the second step in the process of adding a subgroup. The broker details are auto-populated after you enter the master broker ID.

To enter the broker details

1. Perform the steps that are described in Group Details. The Broker Details page is displayed.
2. In the **Master Broker ID** box, type the ID of the master broker, and then press **TAB**. The broker details are prepopulated.

3. Click **Submit**.
The prepopulated information is not editable.

8.2.3 Edit Subgroup Details

You can edit the subgroup details, if you need to make changes to the subgroup information that you provided while creating the subgroup.

To edit the subgroup details

1. Perform the steps that are described in Search Subgroup.

2. In the Actions column of the Sub-group Data list, click the Edit link against the subgroup record that you need to edit.

Alternatively, on the Subscriber and Dependent pages, you can edit subgroup details.

To edit the subgroup details on the Subscriber page, perform the steps that are described in View Subscribers, and then click the Edit Sub-group Details link in the Sub-group Details area.

To edit the subgroup details on the Dependent page, perform the steps that are described in View Dependents, and then click the Edit Sub-group Details link in the Sub-group Details area.

The Subgroup Details page is displayed.
Figure 158. Edit Group Details

3. Edit the required subgroup details.

4. Click Broker Details to edit the broker details or click Save & Back to List to save the updated information and navigate to the Sub-group Data page. The Sub-Group page is displayed with the following message.
8.2.4 Delete Subgroup

You can delete a subgroup, if the subgroup is no longer required. If you delete a subgroup, the subscribers and dependents associated with the subgroup are also deleted.

To delete a subgroup

1. Perform the steps that are described in Search Subgroup.
2. In the Actions column of the Sub-group Data list, click the Delete link against the subgroup record that you want to delete.

Alternatively, on the Subscriber and Dependent pages, you can delete a subgroup.

To delete a subgroup on the Subscriber page, perform the steps that are described in View Subscribers, and then click the Delete Sub-group link in the Sub-group Details area.

To delete a subgroup on the Dependent page, perform the steps that are described in View Dependents, and then click the Delete Sub-group link in the Sub-group Details area.

The Delete Confirmation dialog box is displayed.
3. Click Yes. The subgroup is deleted.

8.3 Groups

A group is a company or organization that has one or more subgroups consisting of subscribers. This section describes how to add and edit group information.

8.3.1 Add New Group

You can create groups and associate subgroups (a combination of health and dental products tagged to a set of subscribers) to the groups that you have created. While creating a group, you also need to provide the details of the broker assigned to the group.

To add a group, do the following:

**Step 1.** Enter group details.

**Step 2.** Enter broker details.

8.3.1.1 Group Details

Entering the group details is the first step in the process of adding or creating a group. In the Group Details page, you need to enter the group and contact information of the group.

**To enter the group details**

1. Perform the steps that are described in Search Subgroup.

2. Click Add New Group.

Alternatively, on the Subscriber and Dependent pages you can add a new group.

To add a new group on the Subscriber page, perform the steps that are described in View Subscribers, and then click Add New Group.

To add a new group on the Dependent page, perform the steps that are described in View Dependents, and then click Add New Group.

The Group Details section of the Add Group page is displayed.
3. In the **Group ID**, **Group Name**, **Country Code**, **Address Line 1**, and **City** boxes, type the group ID, group name, country code, address, and city of the group, respectively. The **State** box displays the state as New Jersey by default.

4. In the **Zip** and **Phone** boxes, type the zip code and contact number of the group, respectively.

5. In the **Anniversary Date** list boxes, select the month and year on which the coverage is due for renewal.

6. In the **Turnover Ratio** list, select the turnover ratio of the group.

7. In the **Contact Name**, **Phone** and **Email** boxes of the **Contact Details** area, type the contact name, phone and e-mail ID of the group, respectively.
8. Click **Save & Back to List** to save the group information. The following message is displayed.

![Group Details Confirmation](image)

8.3.1.2 **Broker Details**

Retrieving broker details is the second step in the process of adding a group. The broker details are auto-populated after you enter the master broker ID.
To enter the broker details

1. Perform the steps that are described in Group Details. The Broker Details page is displayed.

![Broker Details](image)

Figure 164. Broker Details

2. In the Master Broker ID box, type the ID of the master broker, and then press TAB. The broker details are prepopulated.
3. Click **Submit**.

![Note]
The prepopulated information is not editable.

### 8.3.2 Edit Group Details

You can edit the group details, if you need to make changes to the group information that you provided while creating the group. You can edit the group, contact, and broker details.

**To edit the group details**

1. Perform the steps that are described in **Search Subgroup**.
2. In the **Group Number** column, click the group number. The **Subscriber** section of the **Group Data** tab is displayed.
3. Click the **Edit Group Details** link.

Alternatively, on the **Dependent** page, you can edit the group details.

To edit the group details on the **Dependent** page, perform the steps that are described in **View Dependents**, and then click the **Edit Group Details** link in the **Group Details** area.

The **Group Details** page is displayed.
4. Edit the required group details
5. Click Broker Details to edit the broker details or click Save & Back to List to save the updated information and navigate to the Sub-group Data page. The Sub-Group Data page is displayed with the following message.

Figure 168. Edit Subgroup Details Successful
8.4 Subscribers

Subscribers refer to employees of a company. A set of subscribers are tagged to a subgroup that contains a combination of health and dental products. This section describes how to view, edit, add, and delete subscribers.

8.4.1 View Subscribers

In the Subscriber page, you can add, edit, and delete group, subgroup, and subscriber details. This procedure describes how to view subscribers.

To view subscribers

1. Perform the steps that are described in Search Subgroup.

2. In the Group Number column of the Sub-group Data list, click the group number.
   Or
   In the No. of Subscribers column of the Sub-group Data list, click the number in the respective record.
   The Subscriber section of the Group Data tab is displayed.
8.4.2 Search Subscriber

You can search for a subscriber to edit, delete, and view the subscriber information. To search for a subscriber, you need to enter the relevant search values in any one or more of the following boxes:

- Group Name
- Group ID
- Broker ID
- Anniversary Date

To search a subscriber

1. Perform the steps that are described in View Subscribers.
2. In the Anniversary Date list boxes, select the month and year.
3. Type or select values as appropriate in any one or more of the following boxes:
3. Click **Search**. The search results are displayed based on the search values that you entered.

![Subscriber Search Results](image)

**Figure 171. Subscriber Search Results**

### 8.4.3 Add New Subscriber

You can add a subscriber to a subgroup that you have created. While adding a subscriber, you also need to provide the details of the broker assigned to the subgroup.

**To add a new subscriber**

1. Perform the steps that are described in **Search Subgroup**.

2. In the **Group Number** column of the **Sub-group Data** list, click the group number in the respective record. The **Subscriber** section of the **Group Data** tab is displayed.
3. Click Add New Subscriber.

Alternatively, on the Dependent page, you can add a subscriber.

To add a subscriber on the Dependent page, perform the steps that are described in View Dependents, and then click Add New Subscriber.

The Subscriber and Dependents page is displayed.
Figure 173. Add Subscriber: Subscriber and Dependents Page

The first row is for the subscriber, and therefore the value **Self** is displayed by default. The subsequent rows are for the dependents of the subscriber. You can click the **Remove** link, if you need to remove the rows specific to the dependents.

4. In the **Self** row, type the appropriate values in the following boxes:

   **First Name**
   First name of the employee

   **M.I.**
   Middle initial of the employee

   **Last Name**
   Last name of the employee

5. In the **Prefix** and **Gender** lists, select the prefix and gender of the subscriber, respectively.

6. In the **Date of Birth** boxes, type the date of birth in MM/DD/YYYY format.

7. In the **SSN#** boxes, type the social security number.

8. In the **Relationship** list, select the appropriate dependent (spouse or child)

9. Type appropriate values for the dependent in the following boxes:

   **First Name**
   First name of the dependent

   **M.I.**
   Middle initial of the dependent

   **Last Name**
   Last name of the dependent

10. Repeat steps 5 to 7 to complete the dependent information.
8.4.4 Edit Subscriber Details

You can edit the subscriber details, if you need to make changes to the subscriber information that you provided while creating the subgroup. You can modify the existing subscriber details, add another dependent, or delete a dependent.

To edit the subscriber and dependent details

1. Perform the steps that are described in Search Subgroup.
2. In the Group Number column of the Sub-group Data list, click the group number. The Subscriber section of the Group Data tab is displayed.
3. In the Actions column of the Subscriber Data list, click the Edit link against the subscriber record that you need to edit.

Alternatively, on the Dependent page, you can edit the subscriber details.

To edit the subscriber details on the Dependent page, perform the steps that are described in View Dependents, and then click the Edit Subscriber Details link in the Subscriber Details area.

The Subscriber and Dependents page is displayed.
4. Edit the required subscriber or dependents details.
   For information on adding a dependent, see Add Dependent.
   For information on removing a dependent, see Delete Dependent.
5. Click Submit. The information is updated and the Subscriber section of the Group Data tab is displayed.

8.4.5 Delete Subscriber

If the subscriber is no longer required, you can delete a subscriber. If you delete a subscriber, the dependents associated with the subscriber are also deleted.

1. Perform the steps that are described in Search Subgroup.
2. In the Group Number column of the Sub-group Data list, click the group number. The Subscriber section of the Group Data tab is displayed.
3. In the **Actions** column of the **Subscriber Data** list, click the **Delete** link against the subscriber record that you need to delete.

Alternatively, on the **Dependent** page, you can delete a subscriber.

To delete a subscriber on the **Dependent** page, perform the steps that are described in **View Dependents**, and then click the **Delete Subscriber** link in the **Subscriber Details** area.

The **Delete Confirmation** dialog box is displayed.
4. Click Yes. The subscriber is deleted.

8.5 Dependents

Dependents refer to spouse, children, and domestic partner. The dependents are tagged to the respective subscribers. This section describes how to view, add, edit, and delete dependents.

8.5.1 View Dependents

In the Dependent page, you can add, edit, and delete group, subgroup, and subscriber details. This procedure describes how to view dependents.

To view the dependent page

1. Perform the steps that are described in View Subscribers.
2. In the **Subscriber ID** column of the **Subscriber Data** list, click the subscriber ID.

Or

In the **Dependents** column of the **Subscriber Data** list, click the number in the respective record.

The **Dependent** section of the **Group Data** tab is displayed.
You can search for a dependent to edit, delete, and view the dependent information. To search for a dependent, you need to enter the anniversary date, and then type relevant search values in any one or more of the following boxes:

- Group Name
- Group ID
• Broker ID

**To search for a dependent**

1. Perform the steps that are described in View Dependents.
2. In the Anniversary Date list boxes, select the month and year.
3. Type or select values, as appropriate, in any one or more of the following boxes:
   - Group Name
   - Group ID
   - Broker ID
4. Click Search. The search results are displayed based on the search values that you entered.

![Dependent Search Results](image)

**Figure 181. Dependent Search Results**

### 8.5.3 Add Dependent

You can add spouse and children as dependents for a subscriber, if the subscriber needs to renew insurance coverage for the dependents as well. To add dependents for a subscriber, you need to first search for the subgroup to which the subscriber is tagged.

**To add a dependent**

1. Perform the steps that are described in View Dependents, and then click Add New Dependent.

![](image)

Alternatively, perform steps 1 to 3 that are described in Edit Subscriber Details.

The Subscriber and Dependents page is displayed.
2. Click the + Add More Dependents link. An additional row is displayed.

![Note]

Relationship, First Name, Last Name, Gender, Date of Birth, and SSN# are mandatory.

3. In the Relationship list, select the relationship type of the dependent.
4. In the Prefix list, select the prefix.
5. In the First Name, M.I., and Last Name boxes, type the first name, middle initial, and last name, respectively.
6. In the Gender list, select the gender.
7. In the Date of Birth, type the date of birth in MM/DD/YYYY format.
8. In the SSN# boxes, type the social security number.
9. Click Submit. The Subscriber section of the Group Data tab is displayed.
8.5.4 Edit Dependent Details

You can edit the dependent details, if you need to make changes to the dependent information that you provided while creating the subgroup. You can modify the existing dependent details, add another dependent, or delete a dependent.

To edit dependent details

1. Perform the steps that are described in View Dependents.
2. In the Actions column of the Dependent Data list, click the Edit link against the dependent to edit the details.

Alternatively, perform steps 1 to 3 that are described in Edit Subscriber Details.

The Subscriber and Dependents page is displayed.

2. Edit the required dependent details.
3. Click Submit.

8.5.5 Delete Dependent

You can remove a dependent, if the subscriber does not want to renew the insurance coverage for the dependent. After you remove the dependent, the respective dependent record is deleted.

To delete a dependent

1. Perform steps 1 to 3 that are described in Edit Subscriber Details.
2. Click the **Remove** link against the dependent record you want to delete. The record is deleted.

3. Click **Submit**. The **Subscriber** section of the **Group Data** tab is displayed.

Alternatively, on the **Dependent** page, you can delete a dependent. To delete a dependent on the Dependent page, perform the steps that are described in **View Dependents**, and then click the **Remove** link against the respective dependent record in the **Dependent Data** list.

### 8.6 Validate Data

You need to first validate the group and the subscriber data existing in the flat files, before you renew the insurance coverage. Validation process checks whether a product exist in the product catalog. To proceed with the validation process, you need to select the anniversary date as the criteria. If the validation is not successful for any of the records in the files, the error report for those records are displayed.
To validate data

1. In the Broker portal menu, click Renewals. The Load Data page of the Group Data tab is displayed.
2. Click the Validation tab. The Validation page is displayed.

![Renewals tab](image1)

Figure 187. Validation Page

3. In the Month and Year lists of the Anniversary Date area, select the month and year of the anniversary date, and then click Select Criteria. The anniversary date that you selected and the total number of records in the respective file are displayed.

![Validation Criteria](image2)

Figure 188. Validation Criteria

4. Click Begin Validation. The Validation Status list displays the status of the records processed.
8.6.1 View Error Report

You can view the error reports for the group records, if any, after you complete the validation process. The error report displays the errors associated with the group number. The following are the details displayed in the error report:

- ERROR NUM
- ERROR CODE
- GROUP NUMBER
- ERROR DESCRIPTION

You can either download or save and view the report. The following table describes the different types of errors and the relevant error descriptions.

<table>
<thead>
<tr>
<th>Error Code</th>
<th>Severity (Error/Warning)</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>NOPRT</td>
<td>Error</td>
<td>Group without a product</td>
</tr>
<tr>
<td>INVBKRID</td>
<td>Error</td>
<td>Invalid Broker ID</td>
</tr>
<tr>
<td>NOADR</td>
<td>Error</td>
<td>Group without a group address</td>
</tr>
<tr>
<td>INVPRT</td>
<td>Error</td>
<td>Product that is not active within the start and end effective date of the renewal</td>
</tr>
<tr>
<td>INVDATE</td>
<td>Error</td>
<td>Inconsistency of renewal date (all groups get this error)</td>
</tr>
<tr>
<td>INVZIP</td>
<td>Error</td>
<td>Physical address includes a state other than NJ</td>
</tr>
</tbody>
</table>
Table 11. Error Descriptions: Validation

To view the error report

1. Perform the steps that are described in Validate Data.

2. In the Actions column of the Validation Status list, click the Error Report link. The File Download dialog box is displayed.

Figure 190. File Download

3. Click Open, if you want to view the error report directly from the portal. The error report is displayed.
8.6.2 Stop Validation

You can stop the validation process for the groups and the subgroups tagged to the group, if you do not want to proceed with the validation.

To stop the validation process

1. Perform the steps that are described in Validate Data.
2. In the Actions column of the Validation Status list, click the Stop link.
8.6.3 View History

You can access the history list to view the records that you validated till date. The history list provides a list of records validated as part of the renewal process.

To view the history

1. Perform the steps that are described in Validate Data.
2. Click View History. The Validation History list displays the records that you processed.

![Figure 193. Validation History](image)

8.6.4 View Current

You can view the current group record after you validate the flat file based on the anniversary date that you selected. The current record displays the error report, if any, for the file that is validated.

To view the current group record

1. Perform the steps that are described in View History.
2. Click View Current. The Validation Status list of the Validation page displays the current record.
8.7 Process Renewals

You need to process the group and the subscriber data existing in the flat files to renew the insurance coverage. To proceed with the renewal process, you need to select the anniversary date as the criteria. If the renewal process is not successful for any of the records in the files, the error report for those records are displayed.

*If the product of a particular group is valid, then a renewal quote (existing product with current rate) is created in the portal. If the product existing in a group is invalid, then a conversion quote (an equivalent product with new rates) is created.*

For more information on Quotes and Proposals, see [Quotes](#) and [Proposals](#).

To process the renewals

1. In the Broker portal menu, click **Renewals**. The **Load Data** page of the **Group Data** tab is displayed.
2. Click the **Process Renewals** tab. The **Process Renewals** page is displayed.

   ![Process Renewals Page](image)

3. In the **Month** and **Year** lists of the **Anniversary Date** area, select the month and year of the anniversary date, and then click **Select Criteria**. The anniversary date you selected and the total number of records in the respective file are displayed.

   ![Process Renewals Criteria](image)

4. Click **Begin Process Renewals**. The **Process Renewals Status** list displays the status of the records processed.
8.7.1 View Error Report

You can view the error reports for the group records, if any, after you complete the renewal process. The error report displays the errors associated with the group number. The following details are displayed in the error report:

- ERROR NUM
- ERROR CODE
- GROUP NUMBER
- ERROR DESCRIPTION

You can either download or save and view the report. The following table describes the different types of errors and the relevant error descriptions.

<table>
<thead>
<tr>
<th>Error Code</th>
<th>Severity (Error/Warning)</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>RE</td>
<td>Error</td>
<td>Rates not available</td>
</tr>
<tr>
<td>GSINC</td>
<td>Warning</td>
<td>Group size is greater than 50</td>
</tr>
</tbody>
</table>

Table 12. Error Descriptions: Renewal Process

To view the error report

1. Perform the steps that are described in Process Renewals.
2. In the Actions column of the Process Renewals Status list, click the Error Report link. The File Download dialog box is displayed.
3. Click **Open**, if you want to view the error report directly from the portal. The error report is displayed.

<table>
<thead>
<tr>
<th>ERROR NUM</th>
<th>ERROR CODE</th>
<th>GROUP NUMBER</th>
<th>ERROR DESCRIPTION</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>INVRED</td>
<td>000K18001</td>
<td>Invalid renewal date (not in mm/yyyy for renewal run).</td>
</tr>
<tr>
<td>2</td>
<td>NOSUB</td>
<td>000K19004</td>
<td>Sub-Group has no Subscribers</td>
</tr>
<tr>
<td>3</td>
<td>INVBEKRID</td>
<td>000N12001</td>
<td>Invalid Broker ID</td>
</tr>
<tr>
<td>4</td>
<td>INVBEKRID</td>
<td>000N13001</td>
<td>Invalid Broker ID</td>
</tr>
<tr>
<td>5</td>
<td>INVZIP</td>
<td>000K11K001</td>
<td>Physical address includes a state other than NJ</td>
</tr>
<tr>
<td>6</td>
<td>INVRED</td>
<td>000K11K001</td>
<td>Invalid renewal date (not in mm/yyyy for renewal run)</td>
</tr>
<tr>
<td>7</td>
<td>INVBEKRID</td>
<td>000K11K001</td>
<td>Invalid Broker ID</td>
</tr>
<tr>
<td>8</td>
<td>NOSUB</td>
<td>000K11K001</td>
<td>Sub-Group has no Subscribers</td>
</tr>
</tbody>
</table>

Figure 199. Error Report

Or

Click **Save**, if you need to save the error report in your local drive.
8.7.2 Stop Renewal Process

You can stop the renewal process for the groups and the subgroups tagged to the group, if you do not want to proceed with the renewal process.

To stop the renewal process

1. Perform the steps that are described in Process Renewals.
2. In the Actions column of the Process Renewals Status list, click the Stop link.

![Process Renewals Status](image)

Figure 200. Process Renewals Status: Stop

8.7.3 View History

You can access the history list to view the records that you processed till date. The history list provides a list of records processed as part of the renewal process.

To view the history

1. Perform the steps that are described in Process Renewals.
2. Click View History. The Process Renewals History list displays the records that you processed.

![Process Renewals History](image)

Figure 201. Process Renewals History

8.7.4 View Current

You can view the current group record after you process the flat file, based on the anniversary date that you selected. The current record displays the error report, if any, for the file that is processed.
To view the current group record

1. Perform the steps that are described in View History.
2. Click View Current. The Process Renewals Status list of the Process Renewals page displays the current record.

![Renewals](image)

![Process Renewals Status](image)

Figure 202. Process Renewals Status: View Current

### 8.8 Package Generation

You need to create a proposal for the group and the subscriber data existing in the flat files to renew the insurance coverage. To create a proposal, you need to select the anniversary date as the criteria. If the renewal package generation process is not successful for any of the records in the files, the error report for those records are displayed.

*For an existing product that is due for renewal, you need to create a renewal proposal. For new products that you provide as an equivalent for existing product, you need to create a conversion proposal.*

The following table briefly describes the sections of a proposal.

<table>
<thead>
<tr>
<th>Section</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Header</td>
<td>Header of the proposal contains the following information:</td>
</tr>
<tr>
<td></td>
<td>• Group Information</td>
</tr>
<tr>
<td></td>
<td>Group Name, Group Address, Group Contact Details</td>
</tr>
<tr>
<td></td>
<td>• Master Broker Information</td>
</tr>
<tr>
<td></td>
<td>Name, Address, Phone, and E-mail</td>
</tr>
<tr>
<td>Cover</td>
<td>Static and dynamic information about groups and products (information is prepopulated)</td>
</tr>
<tr>
<td>Summary</td>
<td>Summary contains the following information:</td>
</tr>
<tr>
<td>Section</td>
<td>Description</td>
</tr>
<tr>
<td>------------------</td>
<td>---------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
</tbody>
</table>
| Group Information| - Main Group Number, Main Group Name, List of Subgroups, and List of Products for each Subgroup  
                          - Product Information  
                          Single contract rate, family contract rate, parent-child contract rate, husband-wife contract type rate, monthly rate for the product, annual rate for the product, and percentage increase from last year |
| Renewal Quote Summary | Renewal quote summary for each product within each subgroup                                                                                                     |
| Renewal Census   | Renewal census contains the following information:  
                          - Subscriber Information  
                          First Name, Last Name, Date of Birth, Gender, Contract Type and Medical Waiver, and Dental Waiver  
                          - Dependents Information  
                          First Name, Last Name, Date of Birth, and Gender |
| Alternates       | Comparison of three products: base plan and two alternate plans  
                          **Note:** This section is not included if there are no alternate products identified for the subgroup. |
| Disclaimer        | Static information based on Medical+Rx and Dental products                                                                                     |
| Notification      | Alerts, warnings, upsell, and cross-sell information, based on the group parameters such as the following:  
                          - Group size  
                          - Subscriber age is greater than 65 years  
                          - Dependent age is equal to 26 years  
                          - Dependent age is equal to 31 years |

**Table 13: Proposal Sections**

**To begin the package generation**

1. In the Broker portal menu, click **Renewals**. The **Load Data** page of the **Group Data** tab is displayed.
2. Click the **Package Generation** tab. The **Package Generation** page is displayed.
3. In the **Month** and **Year** lists of the **Anniversary Date** area, select the month and year of the anniversary date, and then click **Select Criteria**. The anniversary date you selected and the total number of records in the respective file are displayed.

4. Click **Begin Package Generation**. The **Package Generation Status** list displays the status of the records processed.
8.8.1 View Error Report

You can view the error reports for the group records, if any, after you complete the package generation process. The error report displays the errors associated with the group number. The following details displayed in the error report:

- ERROR NUM
- ERROR CODE
- GROUP NUMBER
- ERROR DESCRIPTION

You can either download or save and view the report.

To view the error report

1. Perform the steps that are described in Package Generation.
2. In the Actions column of the Package Generation Status list, click the Error Report link. The File Download dialog box is displayed.

![File Download](image)

Figure 206. File Download

3. Click Open, if you want to view the error report directly from the portal. The error report is displayed.

![Screenshot to be included]

Figure 207. Error Report

Or

Click Save, if you need to save the error report in your local drive.

8.8.2 Stop Package Generation Process

If you do not want to proceed with the renewal process, you can stop the renewal process for the groups and the subgroups tagged to the group.

To stop the package generation process

1. Perform the steps that are described in Package Generation.
2. In the Actions column of the Package Generation Status list, click the Stop link.
8.8.3 View History

You can access the history list to view the records that you processed till date. The history list provides a list of records processed as part of the renewal process.

To view the history

1. Perform the steps that are described in Package Generation.
2. Click View History. The Package Generation History list displays the records that you processed.

8.8.4 View Current

You can view the current group record after you process the flat file, based on the anniversary date that you selected. The current record displays the error report, if any, for the file that is processed.

To view the current group record

1. Perform the steps that are described in View History.
2. Click View Current. The Package Generation Status list of the Package Generation page displays the current record.
8.9 Notify and Release

You can notify the brokers and group administrators about the renewals and alternate quotes. The renewals and alternate quotes are notified based on the groups validated and processed in a particular flat file.

The notification e-mail that is sent to the master broker contains the following information:

- Number of renewals for the current month
- Group name
- Group number
- Subgroup number
- Number of contacts
- Monthly premium
- Percentage increase in monthly premium from last year

To notify and release

1. In the Broker portal menu, click Renewals. The Load Data page of the Group Data tab is displayed.
2. Click the Notify & Release tab. The Notify and Release page is displayed.
3. In the Month and Year lists of the Anniversary Date area, select the month and year of the anniversary date, and then click Select Criteria. The anniversary date you selected and the total number of records in the respective file are displayed.

4. Select the Notify Brokers checkbox to notify the brokers, and select the Notify Group Admins checkbox to notify the group administrator.

5. Click Begin Notify and Release. The Notify & Release Status list displays the status of the records processed.
8.9.1  View Error Report

You can view the error reports for the records, if any, after you complete the notify-and-release process. The error report displays the errors associated with the group number. The following details are displayed in the error report:

- ERROR NUM
- ERROR CODE
- GROUP NUMBER
- ERROR DESCRIPTION

You can either download or save and view the report.

To view the error report

1. Perform the steps that are described in Notify and Release.
2. In the Actions column of the Notify & Release Status list, click the Error Report link. The File Download dialog box is displayed.

![File Download dialog box](image)

Figure 214. File Download

3. Click Open, if you want to view the error report directly from the portal. The error report is displayed.

   ![screenshot to be included]

   Figure 215. Error Report

   Or

   Click Save, if you need to save the error report in your local drive.

8.9.2  View History

You can access the history list to view the records that you notified to brokers and group administrators till date. The history list provides a list of records for which notifications were sent to the respective brokers or group administrators.

To view the history

1. Perform the steps that are described in Notify and Release.
2. Click **View History**. The **Notify & Release History** list displays the records that you processed.

![Notify & Release History](image1.png)

*Figure 216. Notify and Release History*

### 8.9.3 View Current

You can view the current group record after you process the flat file, based on the anniversary date that you selected. The current record displays the error report, if any, for the file that is processed.

**To view the current group record**

1. Perform the steps that are described in **View History**.

2. Click **View Current**. The **Notify & Release Status** list of the **Notify & Release** page displays the current record.

![Notify & Release Status: View Current](image2.png)

*Figure 217. Notify and Release Status: View Current*
8.10 Undo

You can search for a subgroup and undo all the steps (validation, process renewals, and package generation) that you performed in the renewal process for the particular subgroup. After the search results are displayed, you can undo the renewal process either for selected records or for all records concurrently.

To undo the renewal process

1. In the Broker portal menu, click Renewals. The Load Data page of the Group Data tab is displayed.
2. Click the Undo tab. The Undo page is displayed.

3. Type or select values as appropriate in any one or more of the following boxes:
   - Group Name
   - Group ID
   - Original Coverage Code
   - New Coverage Code
   - Broker ID
   - Anniversary Date

4. Click Search. The search results are displayed based on the search values that you entered.
5. Click **Undo All Matching** to undo the renewal process for all the records displayed in the search results. The following confirmation message is displayed.

![UndoAllMatch process successfully triggered]

Or

Select the checkboxes in the respective records, and then click **Undo All Selected** to undo the renewal process for the records that you selected. The following confirmation message is displayed.

![UndoSelected process successfully triggered]

### 8.11 Configuration

You can change the configuration settings for functions specific to renewals. The following options are available in the configuration settings:

- Enable and disable the option to provide alternate plans.
- Select the renewal proposal path.
- Edit the verbiage for broker notifications, group notifications, disclaimer, and renewal proposals.

#### 8.11.1 Edit Broker Notification Verbiage

You can edit the static information of the notification e-mail verbiage that is sent to the broker. The static information is classified into the following types:

- Header summary
To edit the broker notification verbiage

1. In the Broker portal menu, click Renewals. The Load Data page of the Group Data tab is displayed.
2. Click the Configuration tab. The Configuration Settings page is displayed.

3. Click the Edit link in the Broker Notification area of the Edit Verbiage section. The Broker Notification window is displayed.
4. Edit the required information.

5. Click **Submit** to save the changes and return to the **Configuration Settings** page. Or
Click **Preview as PDF** to download and view the notification as a PDF file.

Or

Click **Cancel** to discard the changes and return to the **Configuration Settings** page.