INDEPENDENT HEALTH

CPQ On Demand

Broker Portal User Guide

10/28/2015

CPQ OnDemand Broker Portal User Guide
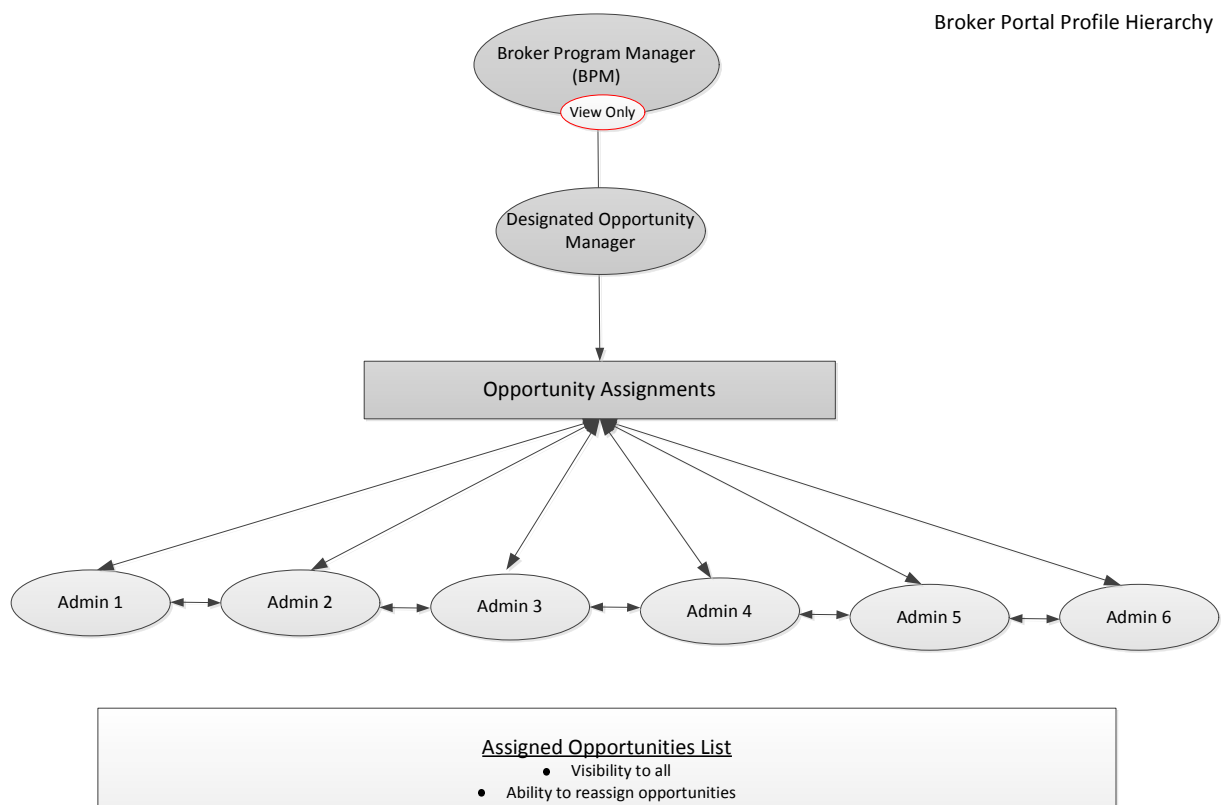
Table of Contents

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Broker Portal Hierarchy Renewal Opportunities:

- A designated individual within your firm has been identified to manage all renewal opportunity assignments to you

Broker Portal Profile Hierarchy

Broker Portal Hierarchy New Opportunities:
- New business opportunities will be initiated directly from the broker portal and submitted to the Independent Health Sales Team for review leading to approval
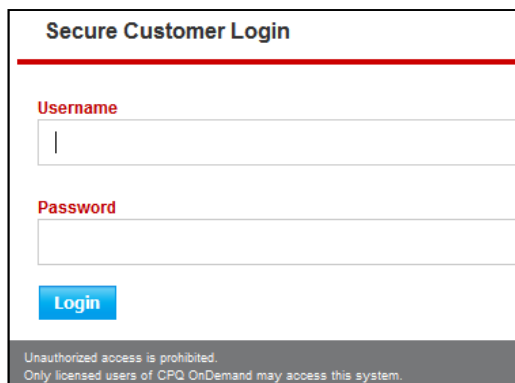
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Emails:

- **New Account:**
    - You will receive a Welcome to CPQ OnDemand email notification once your new account has been created (Administrator managed)

- **Password Reset:**
    - You will receive a CPQ OnDemand Password Reset email should a password reset be requested (Administrator managed)
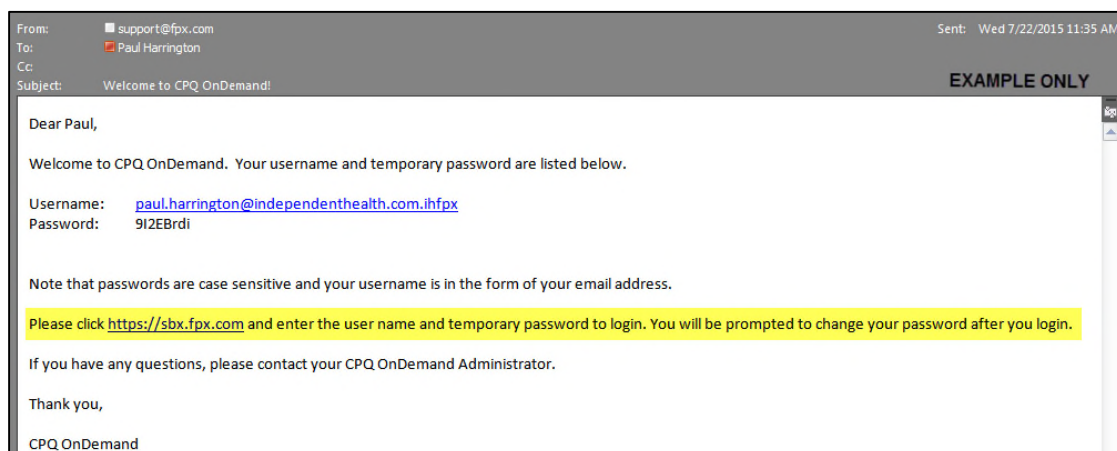
Note:

Within the body of each email a direct link to the Broker Portal has been provided. Selecting the link will deliver you to the secure login page where you will enter your Username and temporarily issued Password

Email Examples:

- **New account email:** User Name and Temporary Password

- **Password reset email:**
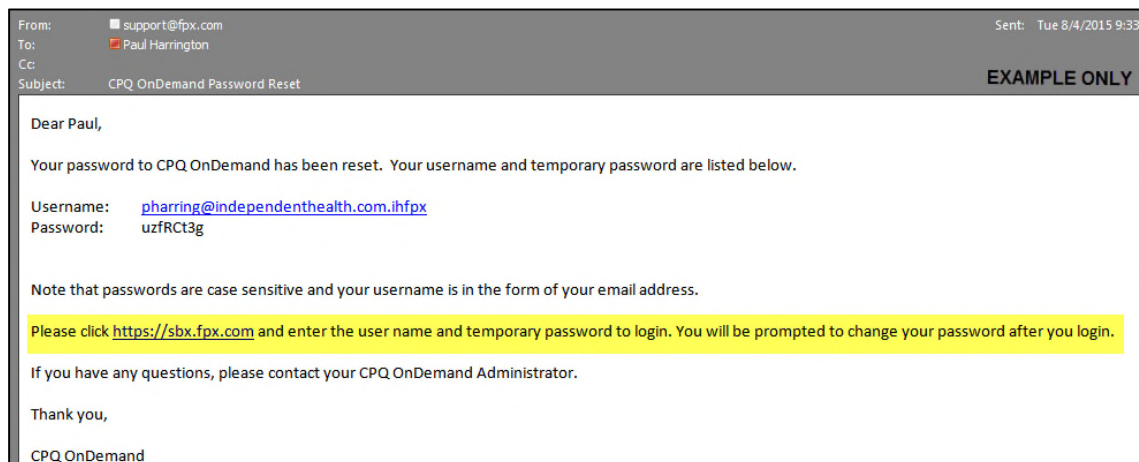
Login:

- To login from the Independent Health.com website

- Navigate to https://www.independenthealth.com/Broker

1. Ensure you select the Broker tab at the top of the page

Note:

- Selecting page options 2, 3 and 4 provide various options to arrive at the login page
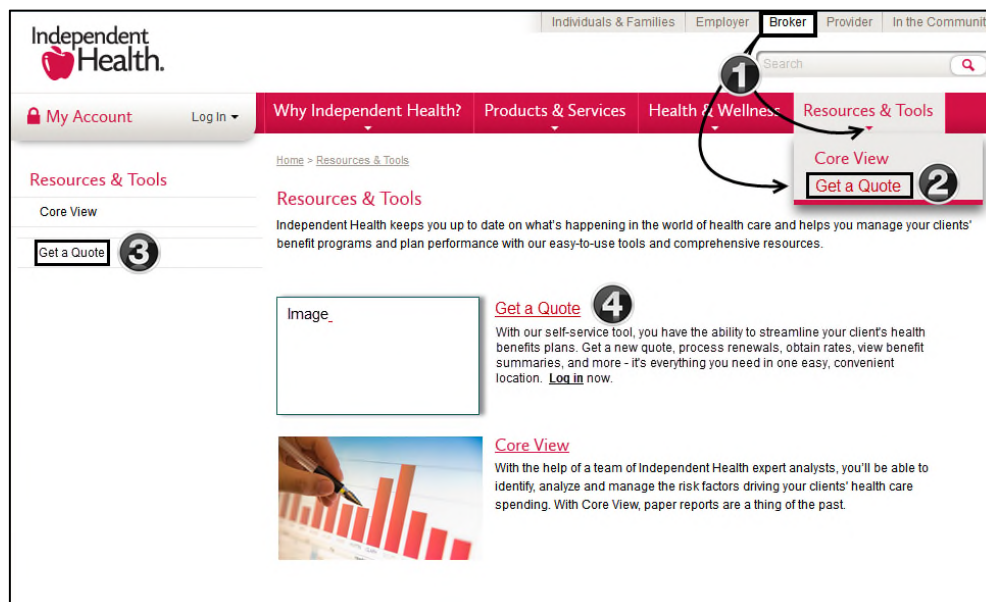
CPQ OnDemand Broker Portal User Guide
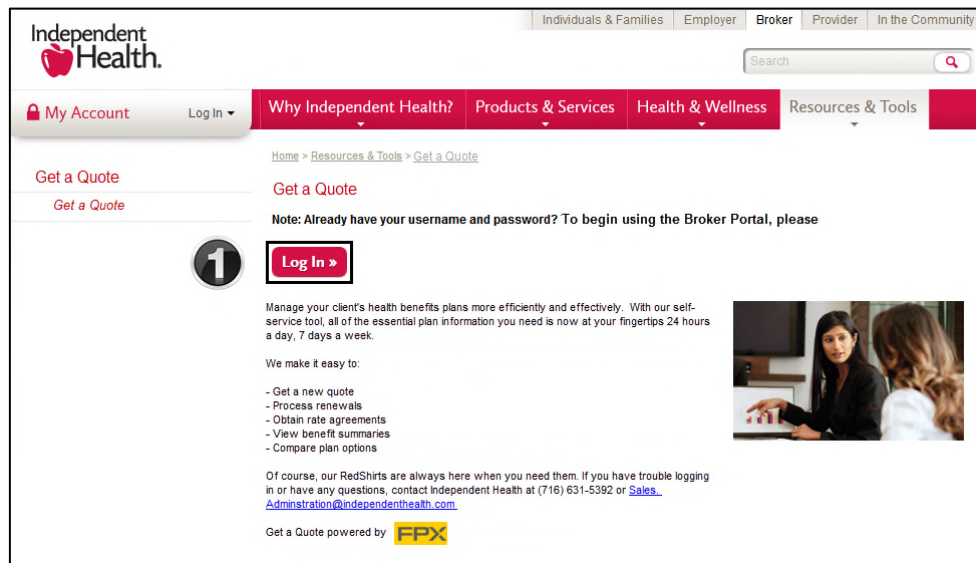
1. Select the Log In button

    - **You are now ready to login**

1. Enter your User Name and Password
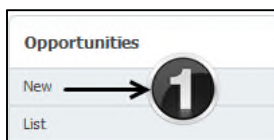2. To quickly navigate back to the login page you can select the Bookmark this Page link

- You have successfully logged into the Broker Portal

Managing Opportunities – NEW:

- Click on New : Creation of a new opportunity supporting a new business quote
- Click on List: Displays a list of assigned opportunities

1. Click **NEW** to create a new opportunity
   - Fields with **RED** labels are required fields
   - Click **SAVE** to complete creation of the new opportunity record

Note:
Product Type of Medical is a default value (ensure your product type reflects the correct selection)

1. Click **EDIT** should you need to modify the record
2. Click **DELETE** to remove the record
3. Click **COPY** to copy the existing opportunity (**New Opportunities ONLY**)
4. To create a Quote click on the **NEW** button within the Quotes section of the page
   Note: Copy quote - you will need to modify the Opportunity naming convention to be uniquely named.
   Copy can only be used to copy <u>new</u> opportunities

Creating a New Quote:

1. Enter the desired quote name followed by clicking the **SAVE** button

2. You have created a new Quote – now you must add products to the quote. Click on the quote name (link) to add products
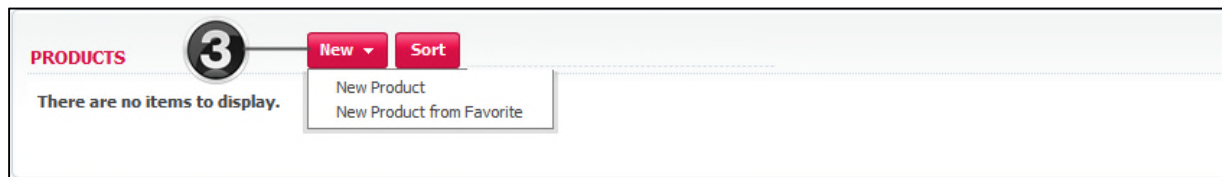
3. Choose **NEW PRODUCT** from the list
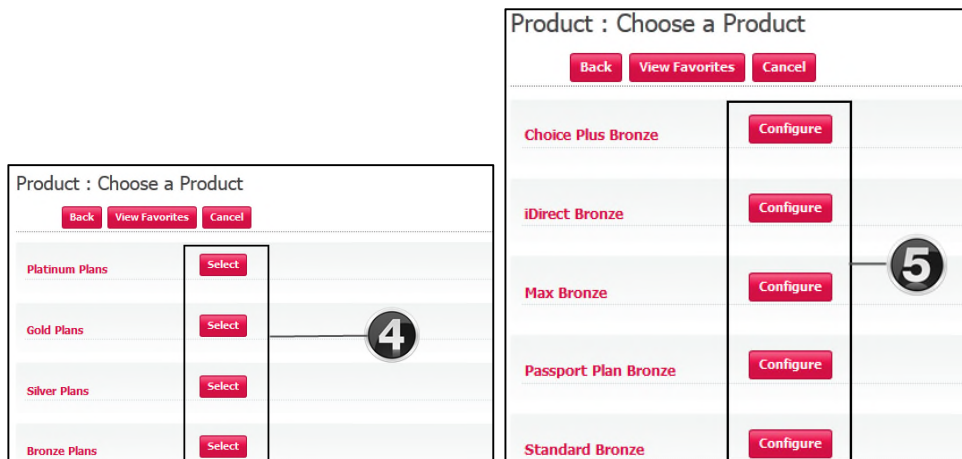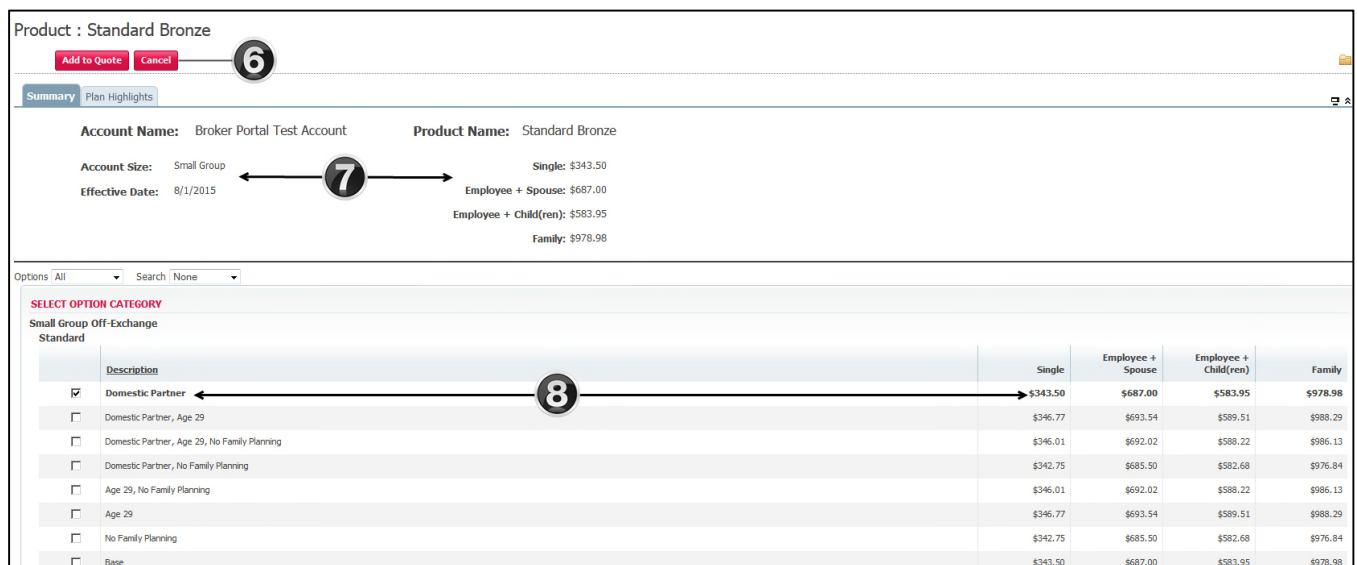

4. Metal Product Tiers – Click **SELECT** from the desired metal tier
5. Click **CONFIGURE** to choose a product and rider for the selected product

6. Click **Add to Quote** to add the selected plan/rider or **Cancel** to return to the previous page
7. Displays **Account** and **Product** information
8. Displays available rider description/selections and associated Tiers (4)

Notables:
- Domestic Partner is a defaulted rider selection
- Each time the rider selection is changed the associated tier/rate information will be highlighted in bold text to the right of the screen

- Selection of the **Plan Highlights** tab will provide side by side In and Out of Network comparisons

Plan Highlights:

Category	In-Network	Out-Network
Deductible	$3,000 / $6,000	$5,000 / $10,000
Coinsurance	50%	50%
Out-of-Pocket Maximum	$6,350 / $12,700	$10,000 / $20,000
Primary Office Visit	Deductible then 50% coinsurance	Deductible then 50% coinsurance
Specialist Office Visit	Deductible then 50% coinsurance	Deductible then 50% coinsurance
Inpatient Hospitalization	Deductible then 50% coinsurance	Deductible then 50% coinsurance
Additional Benefits	Domestic Partner	
Prescription Coverage	Deductible then $10/$35/$70	Not Covered

Generating a Proposal:

9. Click the **NEW** button
10. Enter the name of your proposal and click **SAVE**

11. The newly created proposal can be **EDITIED, DELETED, COPIED or VIEWED** (view printable)
12. Each individual piece of correspondence can viewed by clicking the **VIEW** link
- Clicking **MANAGE CONTENTS** will open the document library housing all listed collateral

Notables:
- By default standard proposal collateral will be preselected and be included in the quote
- Please review the **Managing File Attachments** section starting on page 31

A quick review before taking our next steps!
- ✓ Reviewed portal profile hierarchy
- ✓ Reviewed Email notifications (Welcome and Password reset)
- ✓ Reviewed how to login in using the Independent Health website
- ✓ Created a new opportunity
- ✓ Created a quote, selected a product, configured and added to the quote
- ✓ Created a proposal and reviewed proposal collateral

What's next? We are now ready to send the quote for Approval

The **Send for Approval** selection is located on the Quote Summary page. To quickly navigate between pages you can use the breadcrumb trail located at the top of the page.

Selectable Breadcrumb Trail:

1. Quote Broker Portal Test has been created
2. Standard Bronze product has been selected and configured
3. Proposal Broker Portal Test Proposal has been generated
4. Click **UPLOAD GROUP SUBMISSIONS** to upload supporting documents
5. Quote Status = <u>**SEND FOR APPROVAL**</u> (click on link)
   - The below dialogue box will appear – Click **OK** (comment optional)

   Note:

   - Comments added within the send for approval step will be visible only within the workflow history table – select positioned to the right of **Quote Status** to view

Review Process:
- Send for approval will notify the Independent Health Sales Team by email and identify that a new broker plan offering has been submitted for review
- The Sales Team will conduct a review of your quote to ensure that all required documentation is included

Email Notification sent to Independent Health (requesting approval):

Sent: Thursday, August 20, 2015 10:50 AM
To: Sales Administration
Subject: Broker Portal Test Account-09/01/2015 New Plan Offering for Approval

A Broker New Plan Offering has been submitted.

Account	Broker Portal Test Account
Street	1234 Street
City	Buffalo
State	NY
Zip/Postal Code	14156
Opportunity	Broker Portal Oppty
Opportunity Owner	Paul Harrington
CPQ Opportunity ID	08a0001hiwfxap23
Quote ID	797
Type	New Plan Offering
Product Type	Medical
Effective Date	09/01/2015

Approval Process:
- The submitted quote will remain in status **WAITING FOR APPROVAL** until approved
- As the Independent Health Sales Team approves your submitted quote, you will receive a return email notification

To:	Paul Harrington
Cc:	
Subject:	Broker Portal Test Account-08/20/2015 Has Been Approved

Congratulations, your new account submission for Broker Portal Test Account effective 08/20/2015 has been approved.

Thank you for your continued partnership.

- Within the broker portal you can view the status of your quote by selecting the corresponding opportunity and view the **Quote Status**

- The new account onboarding is now being processed

Rejection Process:

- In the event your quote submission has been rejected, you will receive an email notifying you why the submission was rejected
- Your quote status will reflect – **REJECTED**

Email Notification (rejection process):

Sent: Thursday, August 20, 2015 3:43 PM
To: Paul Harrington; Pamela Jurek
Subject: Broker Portal Test Account-08/20/2015 Has Been Rejected

New account Broker Portal Test Account effective 08/20/2015 has been rejected for the following reason(s):

Notes:

Rejected – please add missing documentation XXXX

Please update and resubmit your request.

Thank you.

Resubmission Process:

- You will need to address the noted discrepancy to resubmit your quote for approval (e.g. – attach documents**)**
- Return to the Quote Summary to upload supporting documents

- Click **UPLOAD GROUP SUBMISSIONS** to upload the required documentation
- As you have addressed the noted discrepancy take the following steps to resubmit

1. Click on the quote name (link)

2. Click the **EDIT** button to open the quote

3. Click the **SAVE** button and using the breadcrumb trail at the top of the page step back to Broker Portal Test which is the Quote Summary page (Use the breadcrumb trail)

4. Click **SEND FOR APPROVAL** (link)
   - The below dialogue box will appear
   - The below dialogue box will appear – Click **OK** (comment optional)

5. The quote status has now been updated to **Waiting for Approval**
   - The Independent Health Sales Team will receive email notification requesting approval
   - The quote is approved
   - A email notification will be sent to you confirming approval

   - Within the broker portal you can view the status of your quote by selecting the corresponding opportunity and view the **Quote Status**


You have successfully completed submission of a sold quote to Independent Health for new business using both approval and rejection workflows.

New Business Quoting Process - END

Managing Opportunities – RENEWAL:

- Renewal opportunities will be assigned by an Independent Health Sales Representative to a designated point person within your firm
- The point person will be responsible for managing opportunity assignments
- An email notification will be sent to you identifying that a renewal opportunity has been transferred to you by your designated point person
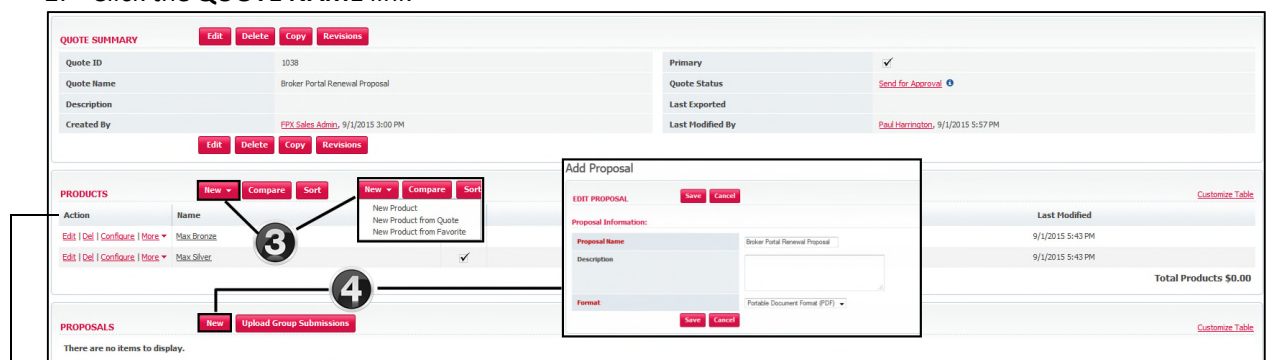

- Example email:
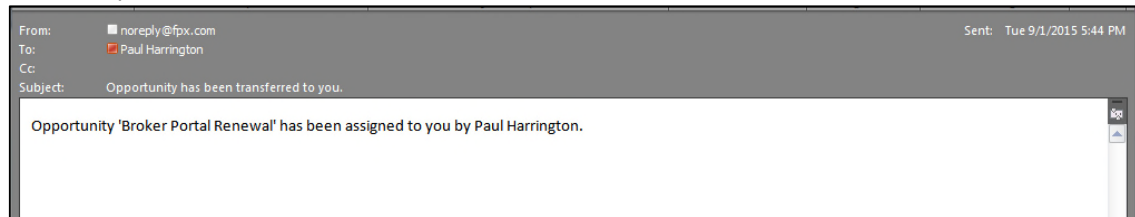
- Login and locate the assigned opportunity within the broker portal
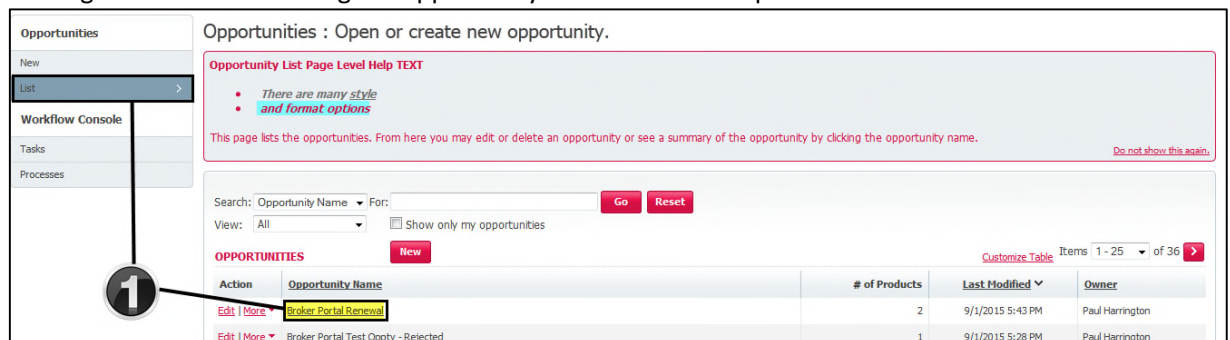
1. Click **LIST** from the left navigation pane, then click on the corresponding opportunity within the list of opportunities to open the quote summary page

2. Click the **QUOTE NAME** link

3. The renewal opportunity will hold the prior year plans purchased by the group – in this example Max Bronze and Max Silver

   Actions:
   - Should the group elect to renew without changes the product and rider configurations do not require any action

- Should the group elect to renew with rider updates click the **CONFIGURE** link
- You can add new products to the quote by clicking **NEW – NEW PRODUCT**
- You can remove a product by clicking the **DEL** link

4. To generate a proposal click **NEW** - name your proposal and click **SAVE**

5. The newly created proposal can be **EDITED, DELETED COPIED, VIEWED** (view printable)
6. Each individual piece of correspondence can be viewed by clicking the **VIEW** link
    - Clicking **MANAGE CONTENTS** will open the document library housing proposal collateral

Notables:

- By default standard proposal collateral will be preselected and be included in the quote
- Please review the **Managing File Attachments** section starting on Page 31

A quick review before taking our next steps!

✓ You received an email notification identifying that a renewal opportunity was assigned to you
✓ You completed a review of the plans included in the assigned renewal opportunity
    - Reviewed with no changes required
    - Determine if you wish to configure the existing plans (rider selections)
    - Add new plans to the existing opportunity
    - Delete plans from the opportunity
✓ Created a proposal and reviewed proposal collateral

What's next? We are now ready to send the quote for Approval

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The **Send for Approval** selection can be located on the Opportunity Summary or Quote Summary pages.

Opportunity Summary:

Quote Summary:

1. Quote Broker Portal Renewal Proposal has been created
2. Max Bronze and Standard Bronze products are included within the quote
3. Proposal Broker Portal Renewal Proposal has been generated
4. Quote Status = **SEND FOR APPROVAL** (click link)
   - The below dialogue box will appear – Click **OK** (comment optional)

   Note:
   - Comments added within the send for approval step will be visible only within the workflow history table – select 🛈 positioned to the right of **Quote Status** to view

Review Process:

- Send for approval will notify the Independent Health Sales Team by email and identify that a renewal opportunity has been submitted for review
- The Sales Team will conduct a review of your renewal quote to ensure all required documentation is included

- Email notification sent to Independent Health requesting review/approval
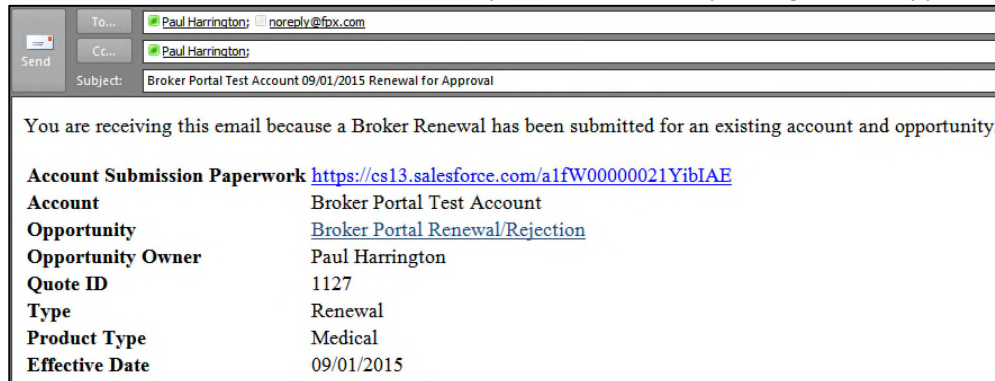
Approval Process:

- Once the Independent Health Sales Team approves your renewal quote, you will receive a return approval email notification
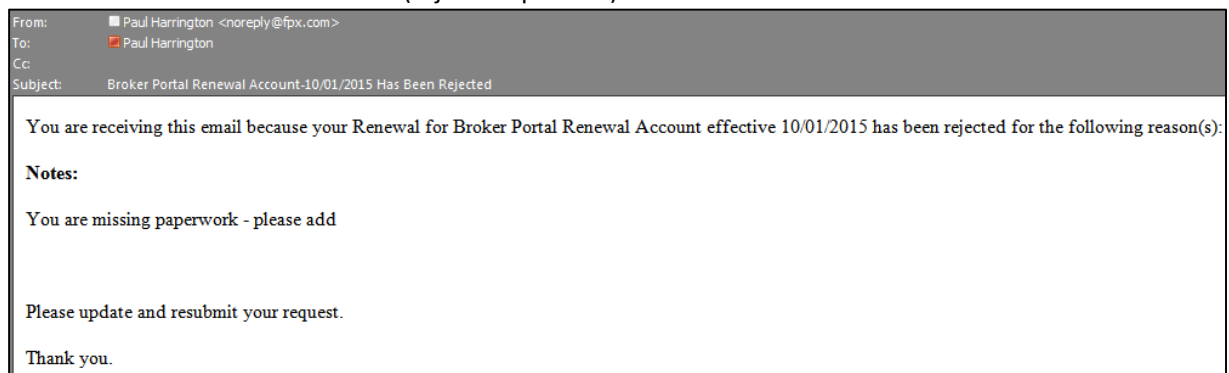- The renewal for the group is now being processed
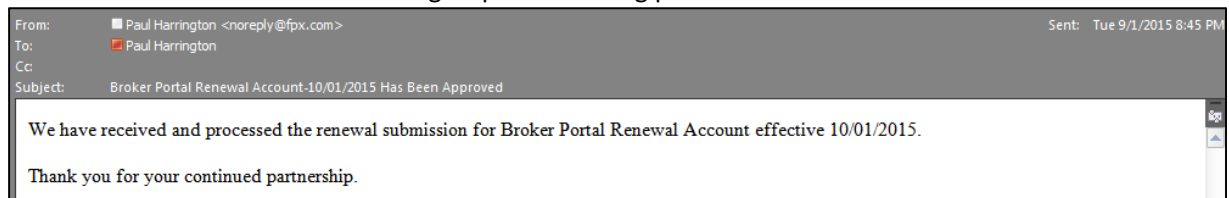
- Within the broker portal you will notice that your renewal quote status on the opportunity summary or quote summary now reflects a status of **Approved**

Rejection Process:

- In the event your quote submission has been rejected, you will receive an email notifying you why the submission was rejected
- Email notification (rejection process)

- The quote status now reflects as REJECTED

Resubmission Process RENEWAL:

- You will need to address the noted discrepancy to resubmit your quote for approval (e.g. – missing documentation)
- Return to the quote (click to open) and then select the **UPLOAD GROUP SUBMISSIONS** button to upload add any missing documents

- As the noted discrepancy has been addressed you will take the following steps to resubmit

1. Click the **EDIT** button to open the quote

2. Click **SAVE**

Click **OK**

3. Click **SEND FOR APPROVAL,** comment dialogue box will appear – Click **OK** (comments optional)

4. The quote status has now changed to **WAITING FOR APPROVAL**
   - Send for approval will trigger a notification email to the Independent Health Sales Team

- The Sales Team will review the quote submission to ensure that all required documentation has been received
- The quote has been approved
- Approval will trigger the below email notification to you identifying that your quote submission has been approved

- You will notice that the Quote Status will reflect **APPROVED** within both the Opportunity Summary and Quote Summary

Renewal Quoting Process – END

Off-Cycle Plan Change Process:

- Using the current year renewal opportunity for your account, you will add a new plan/proposal and submit for approval

1. Click LIST – locate the renewal opportunity associated to the group requesting a plan change
   - Click on the **OPPORTUNITY NAME**

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2. Click **NEW**

3. Enter a **QUOTE NAME and Click SAVE**

4. Click **NEW – NEW PRODUCT**

5. Select the desired metal tier
   - Click **SELECT**
   - Click **CONFIGURE** next to the requested product

6. Select the desired rider and click the **ADD TO QUOTE** button

7. You must click **MAKE PRIMARY**
   - Selection of Make Primary will remove the primary designation on the previously sold plan quote and place it on your newly created quote

8. Generate your proposal - Click **NEW**

9. Enter a Proposal Name – Click **SAVE**

10. Verify that the require Proposal Content has been included in your quote
- Using the breadcrumb trail at the top of the page – **Click** Off Cycle Plan Change Broker Renewal Account
- The above action will allow you to return to the Quote Summary page

11. Should you need to submit supporting paperwork use the **UPLOAD GROUP SUBMISSIONS** button to include in your quote

The Quote Status has updated to **SEND FOR APPROVAL** (Link)
- The below dialogue box will appear – Click **OK**

  (Comment Recommended)

12. The Quote Status has changed to WAITING FOR APPROVAL
- Your Off Cycle Plan Change submission has triggered email notification to an Independent Health Sales Representative

- Approval will trigger the below email notification to you identifying that your Off Cycle quote submission has been approved

- As you return to your opportunity you will notice that the Quote Status has updated to **APPROVED**

Quote Summary View:

Opportunity Summary View:

Note:

- Should your Off-Cycle submission have been rejected, you will follow the rejection resubmission process detailed in both the New and Renewal workflows to resubmit to Independent Health

Off Cycle Plan Change Process – END

Anniversary Date Change Process:

- Anniversary date changes for your group will require that you contact your Independent Health Sales Representative
- A new opportunity will be created by the Independent Health Sales Representative reflecting the requested date change
- The opportunity will then be assigned to your designated point person
- As the opportunity is assigned to you, an email notifying you of opportunity assignment will be sent to you.
- Example email:
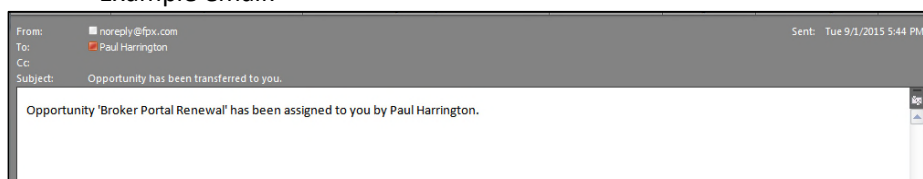
- The opportunity will hold the current plans associated to the group in question

- What actions can be performed on the opportunity?
  - **1.** You can modify the existing plan configuration (rider)
  - **2.** You can delete an existing plan
  - **3.** You can add a new plan
- Once you have addressed plan configuration, generate your proposal and **Send for Approval**

Anniversary Date Change Process – END

Managing Content:
- The broker portal contains a document library responsible for housing the various pieces of collateral required to support both client quoting and submissions to the Independent Health Sales Team.

Standard Reports:
- Standard Reports are those pieces of collateral that are defaulted in order for inclusion in the pre-sale proposal you are sending your customers
- The following collateral comprises standard reporting
- Click **MANAGE CONTENTS** to open the standard report library

- Below the left column displays proposal contents of all collateral currently being defaulted for inclusion in your proposal (differs from New to Renewal)

- Below the (available reports and documents) displays selectable collateral that can be included in the proposal
- Grayed out icons within the library are defaulted and not selectable or removable
    o Icons not greyed out can be added or removed from the Proposal Content list
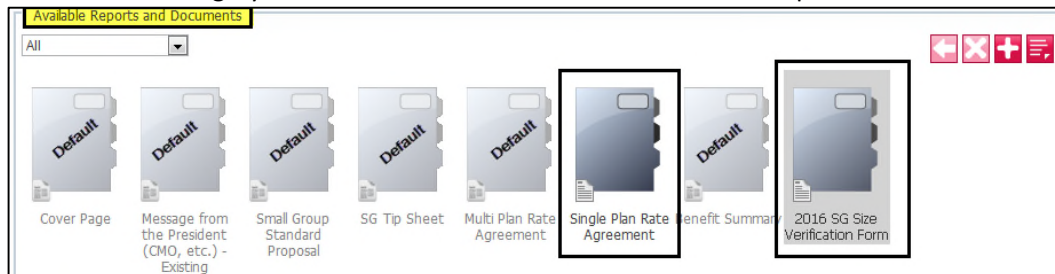
How do I manage collateral in the libraries?
- There are a number of ways to manage collateral within the Standard Reports library
- Select the Multi-Plan Rate Agreement and arrow will appear in the top right corner of the icon
- Click on the arrow to move the selected Multi Plan Rate Agreement into the Proposal Contents pane
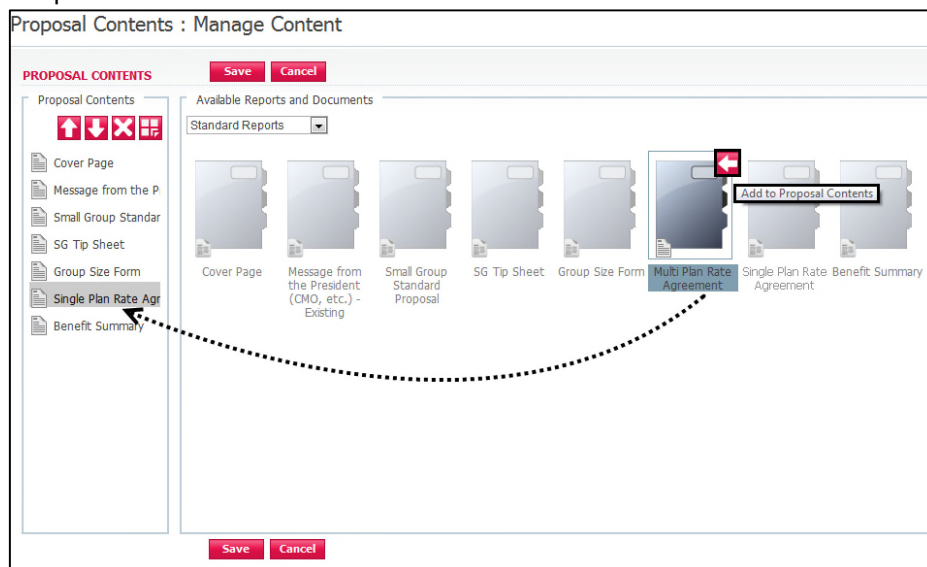
- You have successfully added the Multi Plan Rate Agreement, but will need to now remove the Single Plan Rate Agreement

- Click Single Plan Rate Agreement to highlight and click ☒ to remove from the pane
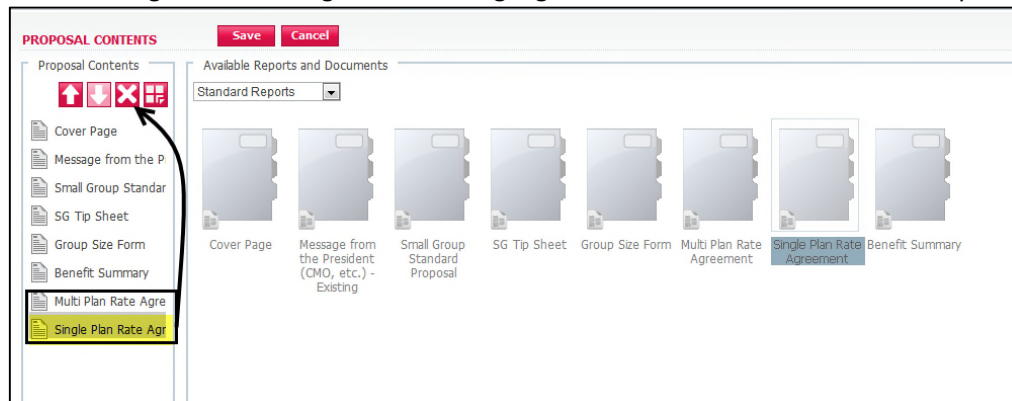
- You will now need to re-order the collateral to ensure the proposal you send to your customer is ordered appropriately
- Selecting Single Plan Rate Agreement – click on ⬆ to move the letter up in the list
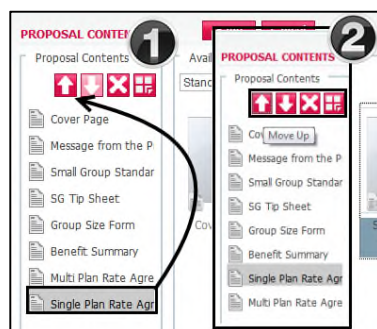
1. Action will move the Single Plan Rate Agreement above the Multiple Plan Rate Agreement in the list
2. Illustrates the resulting reordering in the list
   - Now that you have added the Single Plan Rate Agreement you will need to remove the Multi Plan Rate Agreement from the list
   - Click on Multi Plan Rate Agreement followed by clicking ☒ to move out of the Proposal Content list and back to the Available Reports and Documents area
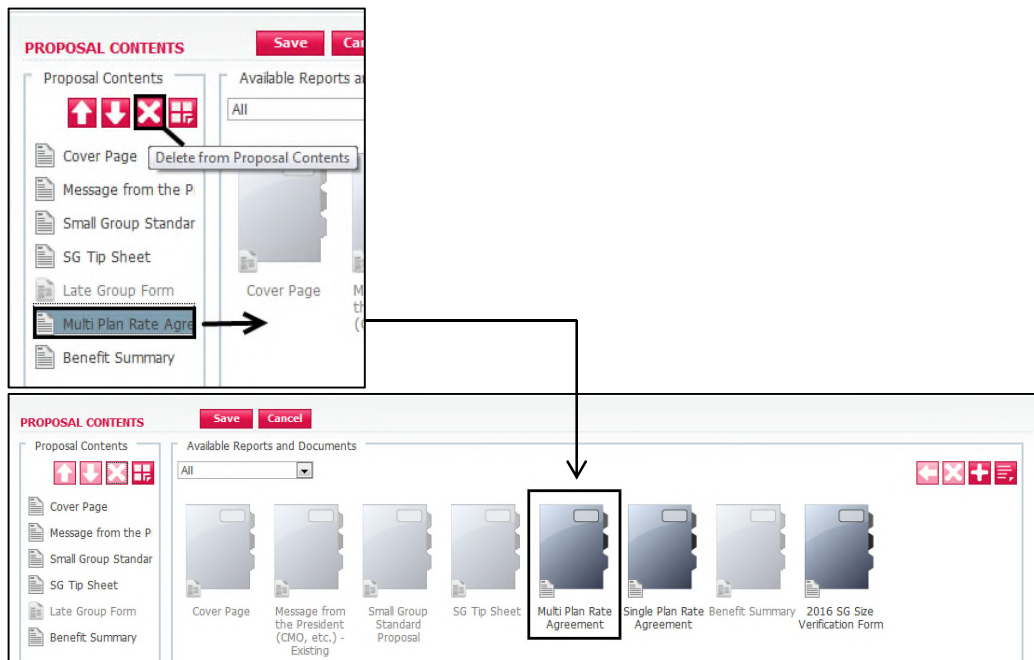
Managing file attachments:

- There are two distinct methods by which you can add supplemental documents
    - Client Proposal Document
    - Independent Health Group Submission paperwork

Client Proposals: Attaching supplemental documents to the proposal

- To attach a document to your proposal (outbound to customer) click the ⊞ button located at the top right of the Available Reports and Documents page
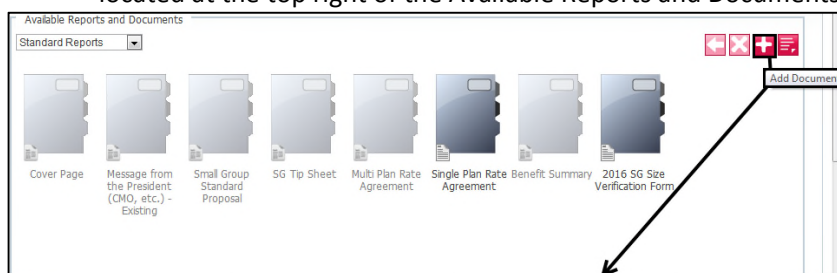
1. Click on the BROWSE button to browse out and select your document
   - PDF is the only accepted file type supported for files to be included in your outbound proposal
2. Enter a name for the document
3. You can select the document library you wish to upload the document
   - This Opportunity Only
   - My Document Library
   - To include the document in your proposal click the available box

4. Test Upload Document has been load to the reports page. Selection of the left arrow icon will add the document for inclusion in the proposal
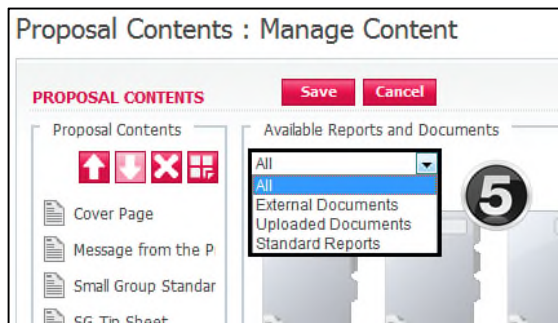
5. There are 3 listed libraries
    -   **All** = all documents will be displayed (Standard & Uploaded)
    -   **External** = library will NOT be used
    -   **Uploaded documents** = documents you have uploaded
    -   **Standard** = all default documents required to support the proposal

Independent Health Group Submission: Attaching support documents to Salesforce

-   Prior to sending back your final sold proposal to Independent Health for approval you will need to be sure all supporting documentation is attached
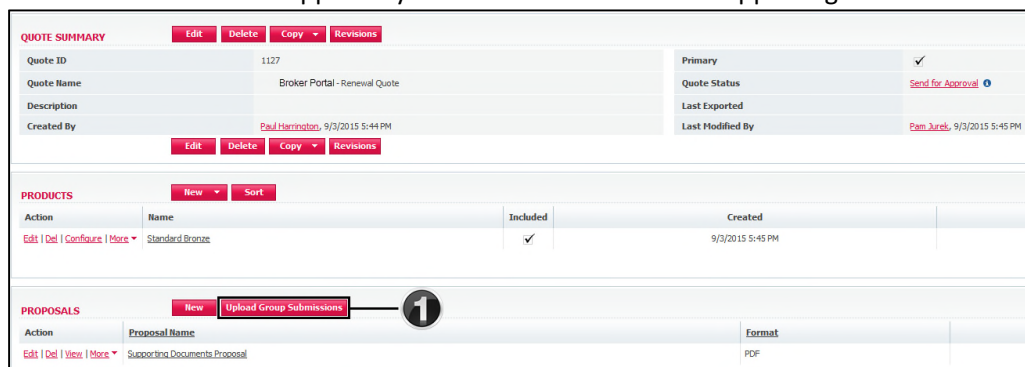
1. From the Quote Summary page click **UPLOAD GROUP SUBMISSIONS**
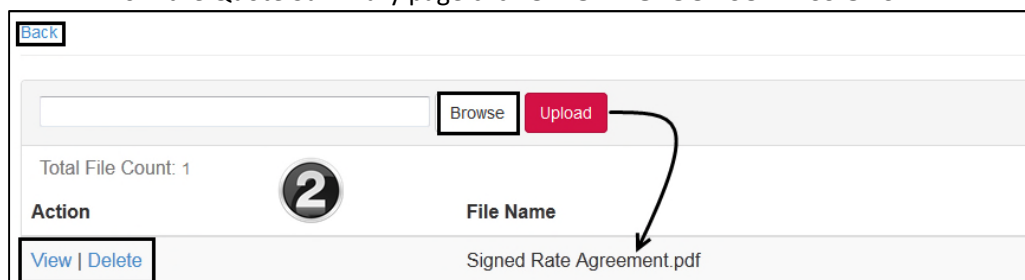
2. Click **BROWSE**, add file and Click **UPLOAD**
    -   The file as named will display
    -   Click **VIEW** to open the file
    -   Click **DELETE** to remove the file
    -   Click **BACK** to return to the Quote Summary when finished uploading documents
    -   Send for Approval

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Note:
- The uploaded document will be automatically attached to the corresponding Salesforce Opportunity
- The Independent Health Sales Team can review and then provide final approval for the submitted proposal

Managing Content Process – END

Support Contacts:

Do you have questions?

- Contact our Sales Department at (716) 631-5392 or 1-800-453-1910
- For technical difficulties please email SalesTechnology@independenthealth.com

Helpful Hints:

Browsers:
If using Internet Explorer the most current version is recommended
- Lower versions of I.E. may produce unexpected behaviors

Alternatively, Mozilla Firefox is a recommended browser

Email Notification:
When changing ownership to another individual make sure to select the check box – **Send Email Notification**. Should you not check the box no notification will be sent to the individual informing them that an opportunity has been assigned to them.

Make Primary: (setting a quote to primary quote)
- In the event you have created more than one quote during the client quoting process. If the chosen sold quote is not set as the primary quote you will need to set it as the primary quote
- Note that in the below example the current Primary Quote is established to Off – Cycle Plan Change Broker Renewal Account
- To change, select the desired quote to open the quote
    - Click button MAKE PRIMARY to set the selected quote to primary
- ONLY ONE QUOTE CAN BE SET TO PRIMARY

Exclude Plans from a Quote:

Should you quote multiple products for your customer, and you do not wish to include all selected plans in the final quote you will exclude what is not wanted
- Click **MORE** followed by **EXCLUDE** – the product selected will no longer be included in the final quote to the customer

CPQ Quoting Tool Product Data Manager Update:

In the event Independent Health refreshes the CPQ Product Data Manager (PDM) and you have quotes that are in a status of SEND FOR APPROVAL, you will need to update your quote proposal to ensure that the collateral reflects the most current information.
- Independent Health will notify you via email should any data refreshes occur within the Product Data Manager

Opportunity Field Requirements (new and renewal):

Broker Renewal:
To ensure that the Opportunity is properly populated prior to broker assignment the following identified fields are to be properly populated
- Sole/Joint: (cannot be pending)
- Stage: New Plan Offering / Renewal
- Sales Channel: Broker Portal
- Funding/Rating: Community
- Tier: 4
- Billing Street
- Billing City
- Billing State
- Billing Zip

Broker New:
A new sale will require that a corresponding Salesforce Account and Opportunity be created to support management and onboarding of the account.
Ensure that the identified opportunity fields are properly populated
- Sole/Joint: (cannot be pending)
- Stage: New Plan Offering / Renewal
- Sales Channel: Broker Portal
- Funding/Rating: Community
- Tier: 4
- Billing Street
- Billing City
- Billing State
- Billing Zip

Session Timeout:
- The default session timeout for the Broker Portal is 20 minutes
- In the event of timeout, your will be dropped back to the FPX login page
- Simply log back into the portal

Printing Web Page:
- To print any web page content you can use keyboard shortcut Ctrl P
- This will invoke your print window and you can then send to the printer

Use of Upload Group Submissions Feature:

- The below steps outline the use of Upload Group Submissions functionality to include the required paperwork with your opportunity (e.g. – signed Rate Agreement)
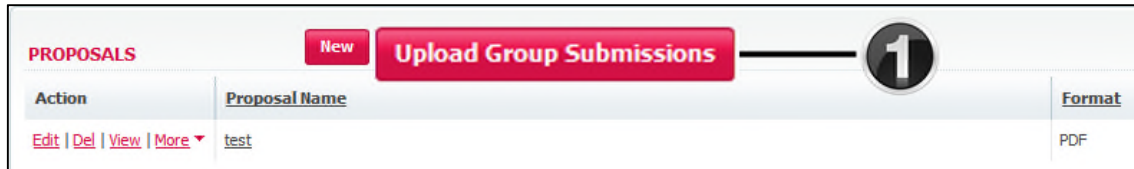
1. UPLOAD GROUP SUBMISSIONS is located within the Proposals section of the page layout
   - Select **Upload Group Submissions**
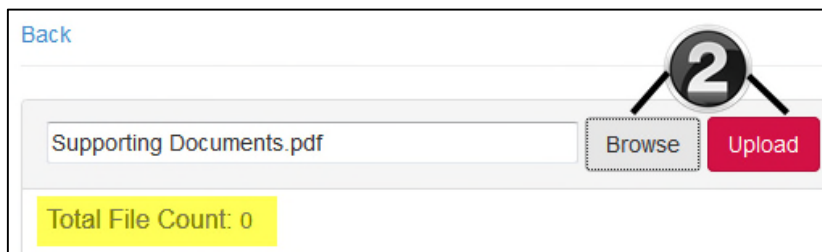
2. Select BROWSE to locate the required file
   - Select Upload
   - Note Total File Count = 0 prior to upload
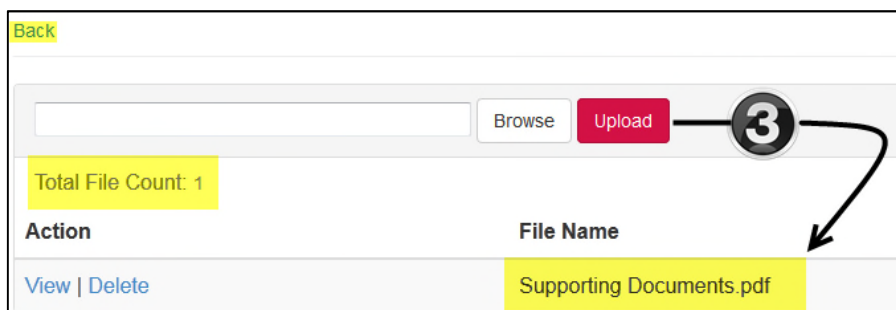
3. The file has been successfully uploaded when you can view the file as per below
   - Select BACK at the top left of the page to return to your Quote Summary

Printing Proposals:

1. From the Opportunity Summary list locate your opportunity and click to open

2. Within the Quotes section of the page layout (last section on the page) locate the desired quote and click to open

3. You are now on the Proposal page. To print your Proposal click **VIEW PRINTABLE**
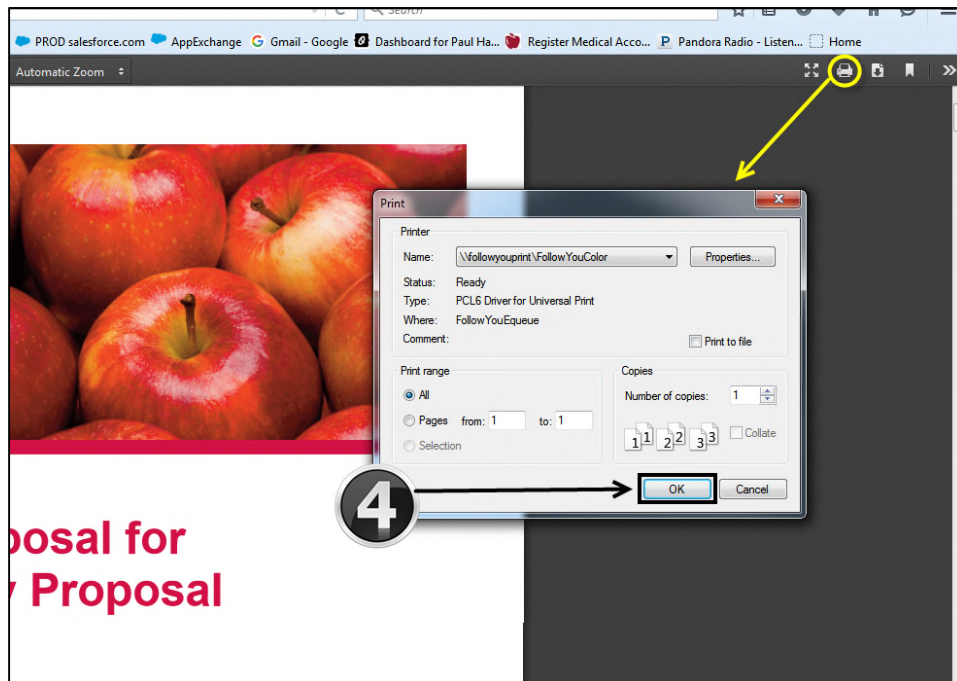
Mozilla Firefox:

1. Click the printer icon located on the far right of the page. Select desired printer and click **OK**
   a. The full proposal will be printed

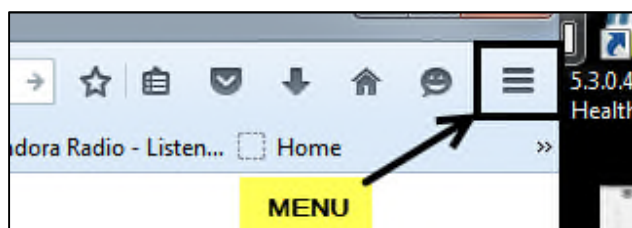**Mozilla Firefox Pop-up Blocker:**

- Confirm that your Pop-up blocker is not preventing the proposal from opening as you select VIEW PRINTABLE
- To check your Pop-up blocker settings (the Menu is located to the far top right of the page)
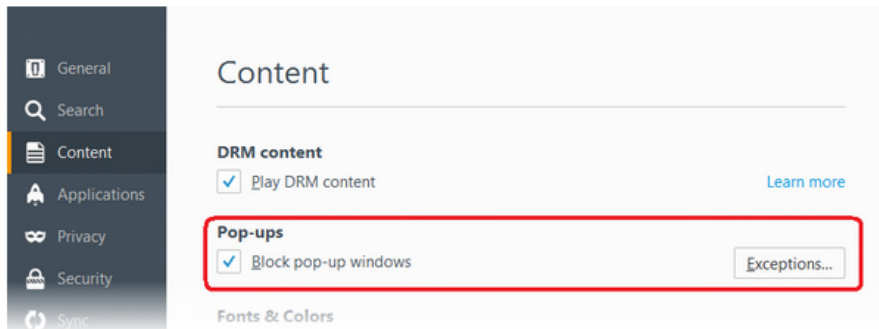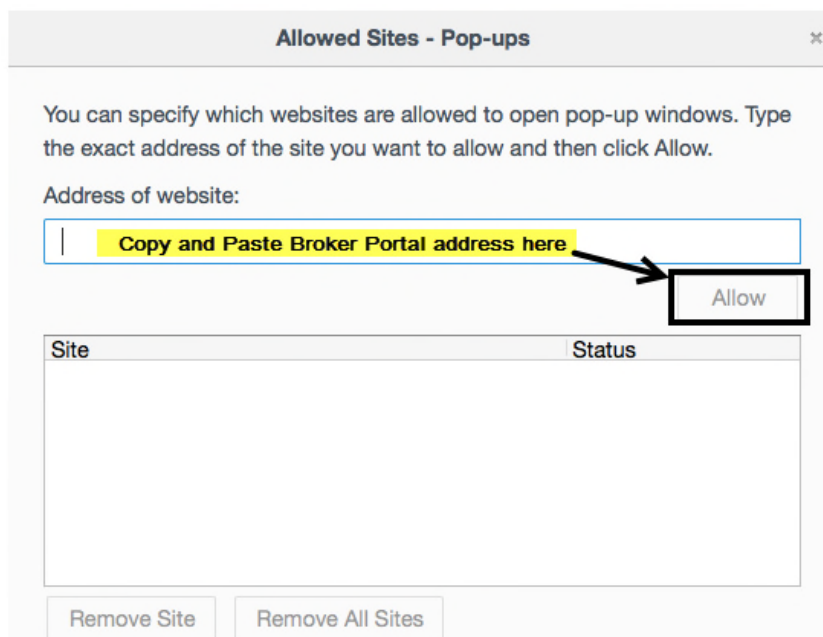 o Click Menu to open

Pop-up blocker settings

To access the pop-up blocker settings:

1. Click the menu button ☰ and choose Options .

2. Select the Content panel.

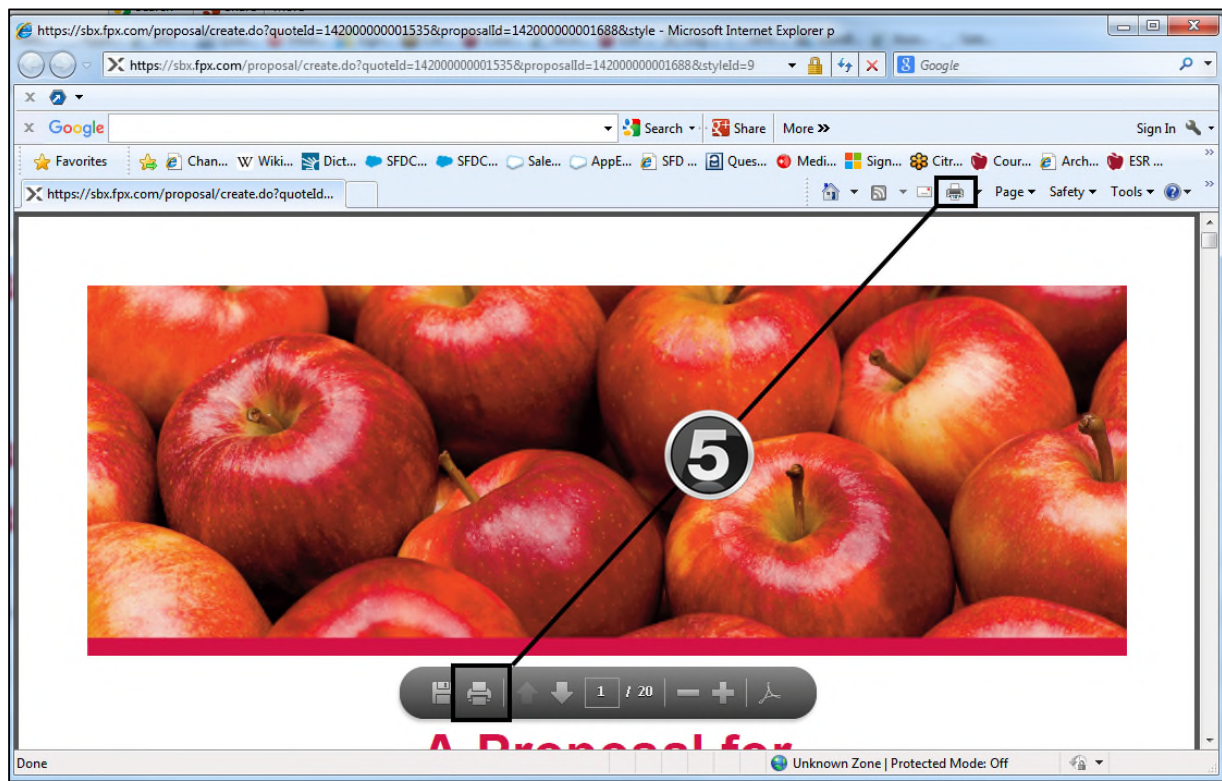In the content panel:

- **Block pop-up windows**: Uncheck this to disable the pop-up blocker altogether.
- Exceptions : This is a list of sites that you want to allow to display pop-ups.
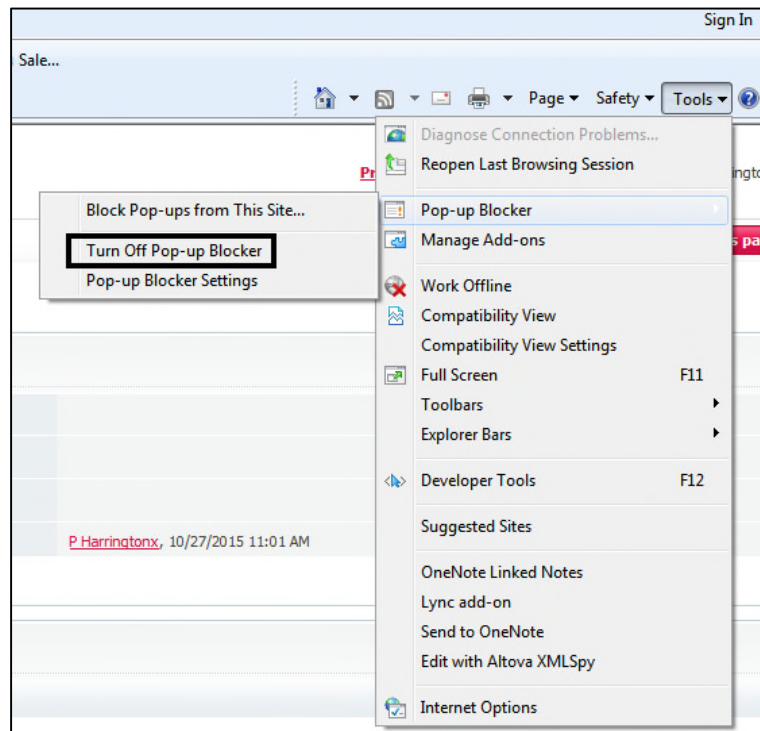
Internet Explorer:

5. Click **VIEW PRINTABLE**
   a. As the proposal opens, click print icon located at the top of your page
   b. Or when hovering over the PDF file you will notice a gray bar that transition onto the page which provides the an additional option to print or save the proposal

Internet Explorer Pop-Up Blocker:

- Confirm that your Pop-up blocker is not preventing the proposal from opening as you select VIEW PRINTABLE
- Select TOOLS followed by Pop-up blocker and ensure that you click Turn Off Pop-up blocker

CPQ OnDemand Broker Portal User Guide