

INDEPENDENT HEALTH

CPQ On Demand

Broker Portal User Guide

10/28/2015

CPQ OnDemand Broker Portal User Guide

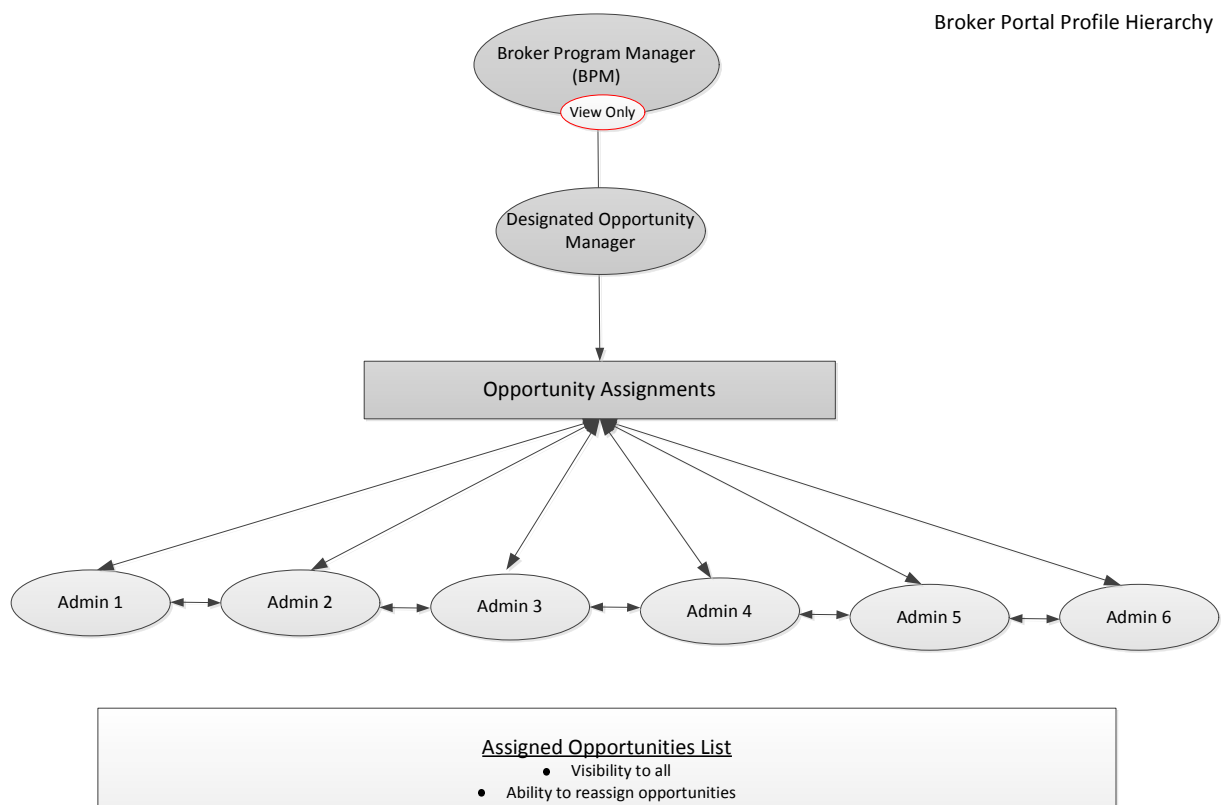
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Broker Portal Hierarchy Renewal Opportunities:

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



Broker Portal 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

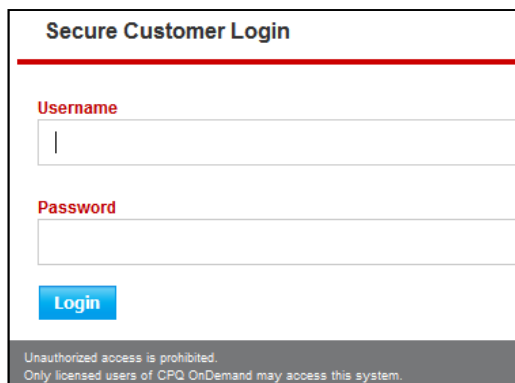
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Emails:

- **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:

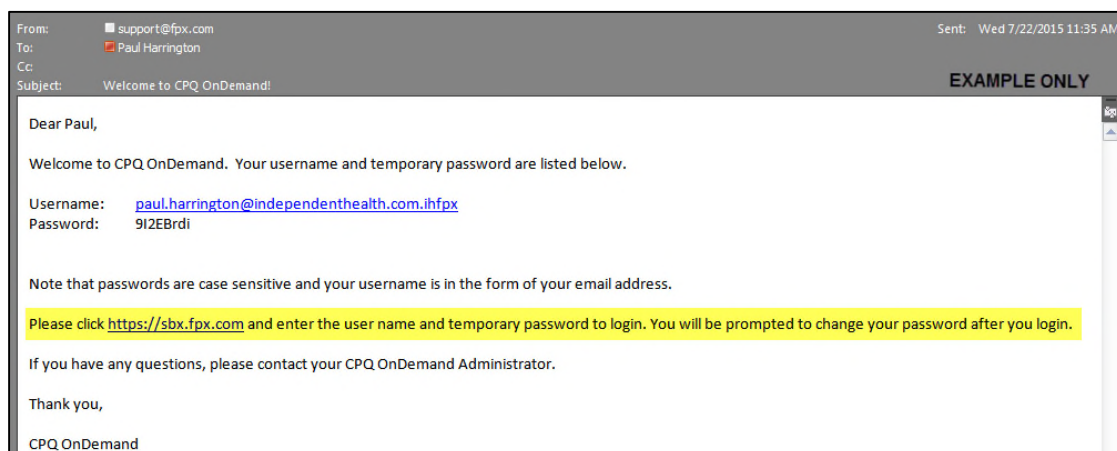
Within the body of each email a direct link to the Broker Portal has been provided. Selecting the link will deliver you to the secure login page where you will enter your Username and temporarily issued Password



The image shows a 'Secure Customer Login' form. It has a title bar with the text 'Secure Customer Login'. Below the title bar, there are two input fields: 'Username' and 'Password'. The 'Username' field has a cursor inside. Below the 'Password' field is a blue 'Login' button. At the bottom of the form, there is a small text box that reads: 'Unauthorized access is prohibited. Only licensed users of CPQ OnDemand may access this system.'

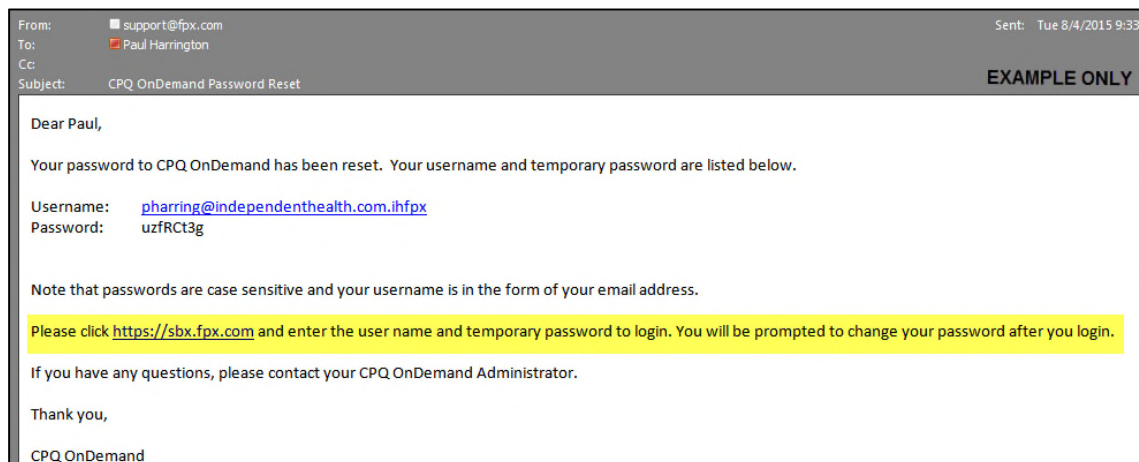
Email Examples:

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



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- **Password reset email:**

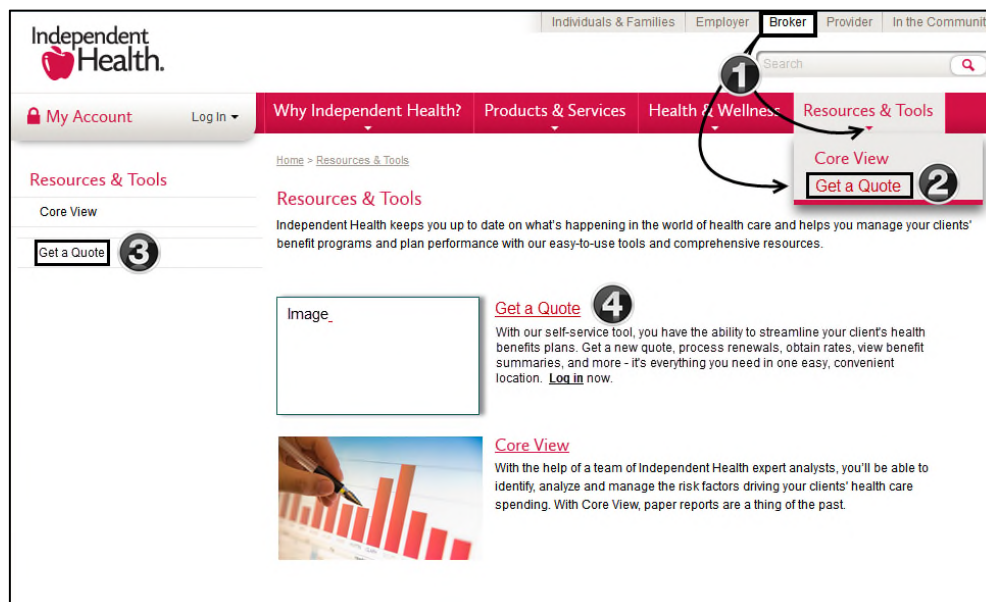


Login:

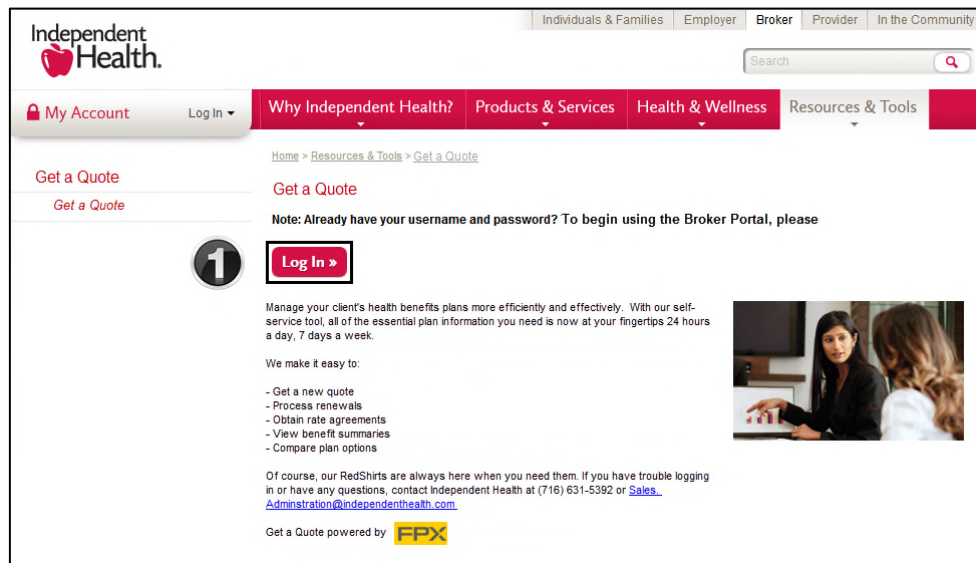
- To login from the Independent Health.com website
 - Navigate to <https://www.independenthealth.com/Broker>
1. Ensure you select the Broker tab at the top of the page

Note:

- Selecting page options 2, 3 and 4 provide various options to arrive at the login page



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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

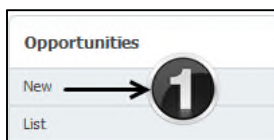
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- You have successfully logged into the Broker Portal



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)

The screenshot displays the 'Opportunity Information' form. At the top, it says 'Opportunity Information : Enter required opportunity information.' Below this is a sub-header 'CREATE/EDIT OPPORTUNITY' with 'Save' and 'Cancel' buttons. The form is divided into two columns. The left column contains fields for 'Account Name' (Broker Portal Test Account), 'Opportunity Name' (Broker Portal Test Oppty), 'Effective Date' (9/1/2015, with a note that it must be set to the first day of the month), 'Type' (New Plan Offering), and 'Product Type' (Medical). The right column contains fields for 'Street' (1234 Street), 'City' (Buffalo), 'State' (NY), and 'Zip/Postal Code' (14156). 'Save' and 'Cancel' buttons are at the bottom.

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Opportunity Summary : View or edit Opportunity information.

This page allows you to view or edit an opportunity. A summary of the opportunity is located in the top section, and a list of the quotes within the opportunity is displayed below that. You may edit or add quotes from this page.

<div> <div>1</div> <div>2</div> <div>3</div> </div> <div> Edit Delete Copy Revisions </div>		<div> <div>Opportunity Name</div> <div>Account Name</div> <div>Opportunity Owner</div> <div>Street</div> <div>City</div> <div>State</div> <div>Zip/Postal Code</div> <div>Tier Structure</div> <div>Currency</div> <div>Stage Name</div> <div>Quote Name</div> <div>Quote ID</div> <div>Created By</div> </div> <div> <div>Broker Portal Test Oppty</div> <div>Broker Portal Test Account</div> <div>Paul Harrington [Change]</div> <div>1234 Street</div> <div>Buffalo</div> <div>NY</div> <div>14156</div> <div>4</div> <div>U.S. Dollar</div> <div></div> <div></div> <div></div> <div>Paul Harrington, 8/19/2015 2:25 PM</div> </div>	<div> <div>CRM Object</div> <div>Product Type</div> <div>Type</div> <div>Effective Date (this must be set to the first day of the month)</div> <div>HR Account ID</div> <div>Doing Business As</div> <div>Acct SHOP</div> <div>Acct Size</div> <div>Funding/Rating</div> </div> <div> <div>[Link]</div> <div>Medical</div> <div>New Plan Offering</div> <div>8/1/2015</div> <div></div> <div></div> <div>No</div> <div>Small Group</div> <div>Community Rated</div> </div>
<div> Edit Delete Copy Revisions </div>		<div>Last Modified By</div> <div>Paul Harrington, 8/19/2015 2:25 PM</div>	

QUOTES [New](#)

4

There are no items to display.

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 new opportunities

Creating a New Quote:

Add Quote

This page allows you to edit quote information.

QUOTE SUMMARY EDIT [Save](#) [Cancel](#)

Quote Information:

1

Quote Name

Description

HR Account ID

Acct Size

Acct SHOP

Broker Portal Quote 1.0

Small Group

No

Funding/Rating

Tier Structure

Community Rated

4

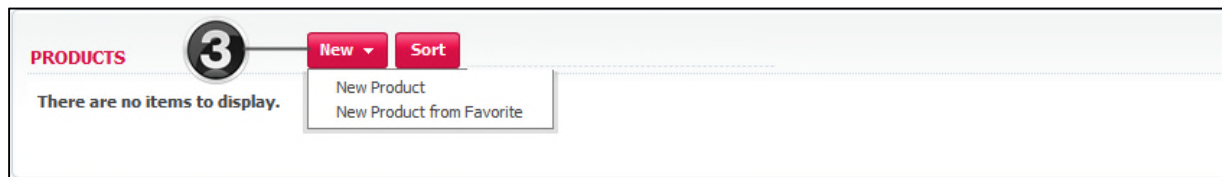
[Save](#) [Cancel](#)

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

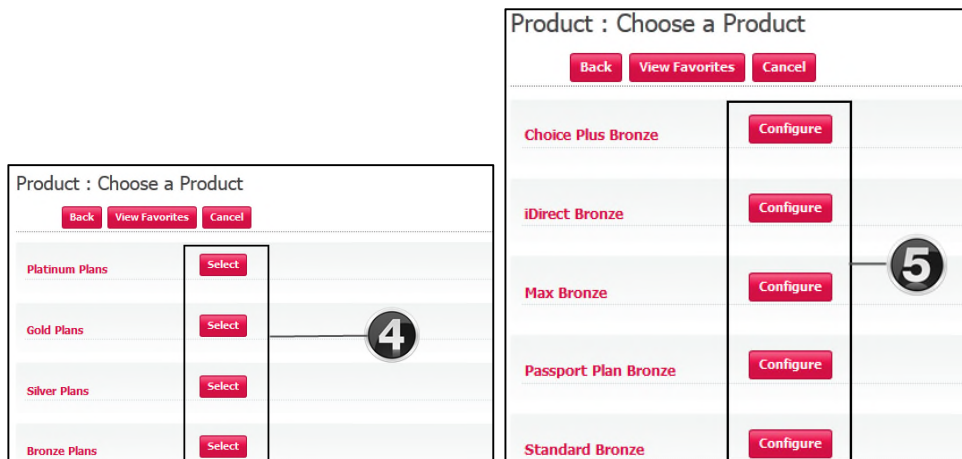
QUOTES New			
Action	Quote Name	Quote ID	Primary
Edit Del More	Broker Portal Quote 1.0 <div>2</div>	793	<input checked="" type="checkbox"/>

2. You have created a new Quote – now you must add products to the quote. Click on the quote name (link) to add products

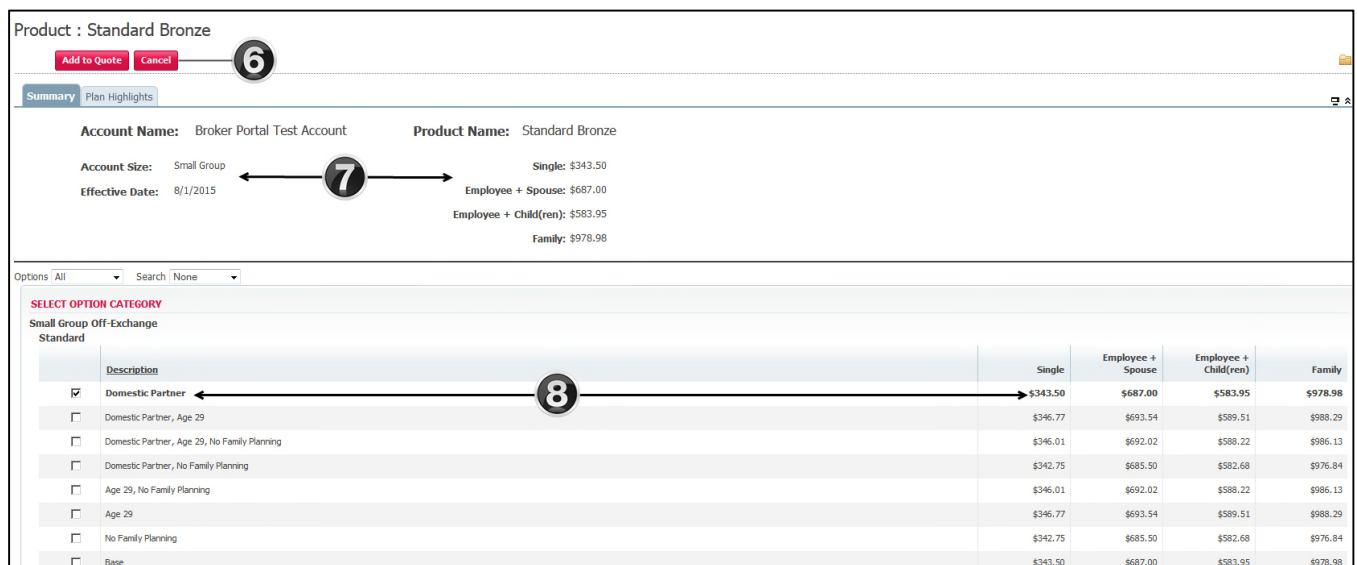
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3. Choose **NEW PRODUCT** from the list



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

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- 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:

Quote : Broker Portal Quote 1.0 (793)

This page allows you to edit a new or existing quote. From this page you can add or edit products. You can also add, edit and attach proposals.

QUOTE SUMMARY [Edit](#) [Delete](#) [Copy](#) [Revisions](#)

Quote ID	793	Primary	✓
Quote Name	Broker Portal Quote 1.0	Quote Status	Send for Approval ⓘ
Description		Funding/Rating	Community Rated
HR Account ID		Tier Structure	4
Acct Size	Small Group	Last Modified By	Paul Harrington, 8/19/2015 3:15 PM
Acct SHOP	No		
Created By	Paul Harrington, 8/19/2015 2:41 PM		

[Edit](#) [Delete](#) [Copy](#) [Revisions](#)

PRODUCTS [New](#) [Sort](#) [Generate SBC](#) [Manual Export](#)

Action	Name	Included
Edit Del Configure More ▼	Standard Bronze	✓

PROPOSALS [New](#)

There are no items to display.

Add Proposal [Save](#) [Cancel](#)

EDIT PROPOSAL [Save](#) [Cancel](#)

Proposal Information:

Proposal Name **10**

Description

Format

[Save](#) [Cancel](#)

9. Click the **NEW** button

10. Enter the name of your proposal and click **SAVE**

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Proposal : Broker Portal Renewal Proposal

Proposal Page Help

PROPOSAL SUMMARY [Edit](#) [Delete](#) [Copy](#) [View Printable](#)

Proposal Name	Broker Portal Renewal Proposal
Description	
Format	Portable Document Format (PDF)
Created By	Paul Harrington, 9/2/2015 5:43 PM

[Edit](#) [Delete](#) [Copy](#) [View Printable](#)

PROPOSAL CONTENTS [Manage Contents](#)

Action	Selected Reports
View	Cover Page
View	Message from the President (CMO, etc.) - Existing
View	Small Group Standard Proposal
View	SG Tip Sheet
View	Group Size Form
View	Multi Plan Rate Agreement
View	Benefit Summary

11. The newly created proposal can be **EDITED, 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

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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:


« [Home](#) » [Opportunities](#) » [Broker Portal Test Oppty](#) » [Broker Portal Test](#)

The screenshot shows the 'QUOTE SUMMARY' page. At the top, there are buttons for 'Edit', 'Delete', 'Copy', and 'Revisions'. The 'Quote ID' is 1137. The 'Quote Name' is 'Broker Portal Test' (callout 1). The 'Description' is empty. The 'Created By' is 'Paul Harrington, 9/4/2015 10:08 AM'. The 'Primary' checkbox is checked. The 'Quote Status' is 'Send for Approval' (callout 5). The 'Last Modified By' is 'Paul Harrington, 9/4/2015 10:09 AM'. Below the quote summary, there is a 'PRODUCTS' section with buttons for 'New' and 'Sort'. The 'PRODUCTS' table has columns for 'Action', 'Name', 'Included', 'Created', and 'Last Modified'. The 'Name' column shows 'Standard Bronze' (callout 2). The 'Included' column shows a checked box. The 'Created' column shows '9/4/2015 10:08 AM'. The 'Last Modified' column shows '9/4/2015 10:08 AM'. The 'Total Products' is '\$0.00'. Below the products section, there is a 'PROPOSALS' section with buttons for 'New' and 'Upload Group Submissions' (callout 4). The 'PROPOSALS' table has columns for 'Action', 'Proposal Name', 'Format', and 'Last Modified'. The 'Proposal Name' column shows 'Broker Portal Test Proposal' (callout 3). The 'Format' column shows 'PDF'. The 'Last Modified' column shows '9/4/2015 10:10 AM'.

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 = **SEND FOR APPROVAL** (click on link)
 - The below dialogue box will appear – Click **OK** (comment optional)

The dialog box is titled 'Workflow: Send for Approval'. It contains a text area with the prompt 'Please enter a comment.' and two buttons at the bottom: 'OK' and 'Cancel'.

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

The 'Quote Status' field displays 'Waiting for Approval' with an information icon (i) to its right.

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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.	

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

The screenshot displays the 'Opportunity Summary' page. A callout box labeled 'Quote Status' points to the 'Waiting for Approval' status. Another callout box labeled 'Quote Status' points to the 'Approved' status in the 'QUOTES' table. The 'QUOTES' table has columns for Action, Quote Name, Quote ID, Primary, and Quote Status. The first row shows a quote with ID 797, named 'Broker Portal Test Oppty', with a status of 'Approved'.

Opportunity Summary : View or edit Opportunity information.	
Opportunity Summary Help --> This page allows you to view or edit an opportunity. A summary of the opportunity is located in the top section, and a list of the quotes within the opportunity is displayed below that. You may...	
Account Name: Broker Portal Test Oppty	
Opportunity Name: Broker Portal Renewal	
Opportunity Owner: Paul Harrington (Channel)	
Effective Date: 10/1/2015	
Type: Renewal	
Product Type: Medical	
Quote Name: Broker Portal Renewal Proposal	
Quote ID: 797	
Created By: Don Scott, 9/2/2015 9:35 AM	
Street: 1234 Street	
City: Buffalo	
State: NY	
Zip/Postal Code: 12345	
Export Status: Not exported	
Last Modified By: Joann Gault, 9/2/2015 8:59 AM	

QUOTES				
Action	Quote Name	Quote ID	Primary	Quote Status
Edit Del More	Broker Portal Test Oppty	797	<input checked="" type="checkbox"/>	Approved

- 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**

Quote Status
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

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QUOTE SUMMARY		Edit Delete Copy Revisions	
Quote ID	1138	Primary	<input checked="" type="checkbox"/>
Quote Name	Broker Portal Test	Quote Status	Rejected i
Description		Last Exported	
Created By	Paul Harrington, 9/4/2015 10:41 AM	Last Modified By	Paul Harrington, 9/4/2015 10:41 AM
Edit Delete Copy Revisions			

PRODUCTS					New Sort	Customize Table
Action	Name	Included	Created	Last Modified		
Edit Del Configure More	Standard Bronze	<input checked="" type="checkbox"/>	9/4/2015 10:41 AM	9/4/2015 10:41 AM		
					Total Products \$0.00	

PROPOSALS				New Upload Group Submissions	Customize Table
Action	Proposal Name	Format	Last Modified		
Edit Del View More	Broker Portal Test Proposal	PDF	9/4/2015 10:41 AM		

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

PROPOSALS				New Upload Group Submissions	Customize Table
Action	Proposal Name	Format	Last Modified		
Edit Del View More	Broker Portal Test Proposal	PDF	9/4/2015 10:52 AM		

1. Click on the quote name (link)

PROPOSAL SUMMARY		Edit Delete Copy View Printable
Proposal Name	Broker Portal Test Proposal	Edit Delete Copy View Printable
Description		
Format	Portable Document Format (PDF)	
Created By	Paul Harrington, 9/4/2015 10:41 AM	

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

Edit Proposal : Broker Portal Test Proposal	
Save Cancel	
Proposal Information:	
Proposal Name	Broker Portal Test Proposal
Description	
Format	Portable Document Format (PDF)
Save Cancel	

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)

« [Home](#) · [Opportunities](#) · [Broker Portal Test Oppty 1](#) · [Broker Portal Test](#) · Broker Portal Test Proposal

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Quote : Broker Portal Test (1138)

Quote Summary Help
This page allows you to edit a new or existing quote. From this page you can add or edit products. You can also add, edit and attach proposals. [Do not show this again.](#)

QUOTE SUMMARY Edit Delete Copy Revisions	
Quote ID	1138
Quote Name	Broker Portal Test
Description	
Created By	Paul Harrington, 9/4/2015 10:41 AM
Edit Delete Copy Revisions	
Primary	<input checked="" type="checkbox"/>
Quote Status	Send for Approval 4
Last Exported	
Last Modified By	Paul Harrington, 9/4/2015 10:51 AM

4. Click **SEND FOR APPROVAL** (link)

- The below dialogue box will appear
- The below dialogue box will appear – Click **OK** (comment optional)

Workflow: Send for Approval

Please enter a comment.

Missing paperwork added

[OK](#) [Cancel](#)

QUOTE SUMMARY Edit Delete Copy Revisions	
Quote ID	1138
Quote Name	Broker Portal Test
Description	
Created By	Paul Harrington, 9/4/2015 10:41 AM
Edit Delete Copy Revisions	
Primary	<input checked="" type="checkbox"/>
Quote Status	Waiting for Approval 5
Last Exported	
Last Modified By	Paul Harrington, 9/4/2015 10:51 AM

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

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**

QUOTES		New		
Action	Quote Name	Quote ID	Primary	Quote Status
Edit Del More	Broker Portal Test Proposal	680	<input checked="" type="checkbox"/>	Approved

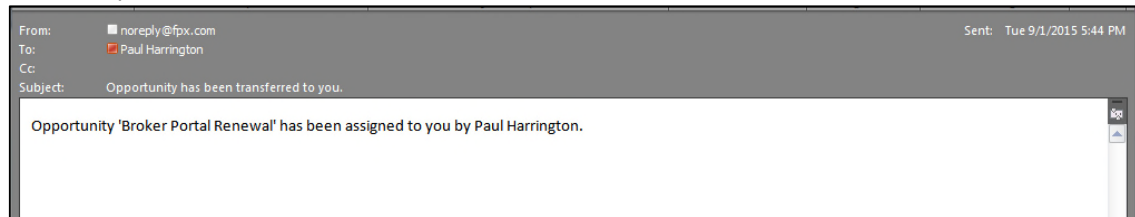
You have successfully completed submission of a sold quote to Independent Health for new business using both approval and rejection workflows.

New Business Quoting Process - END

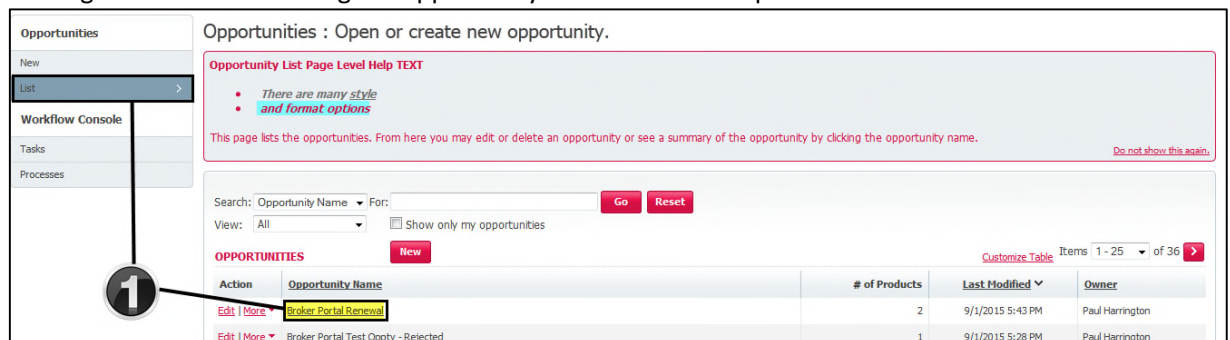
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Managing Opportunities – RENEWAL:

- 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:



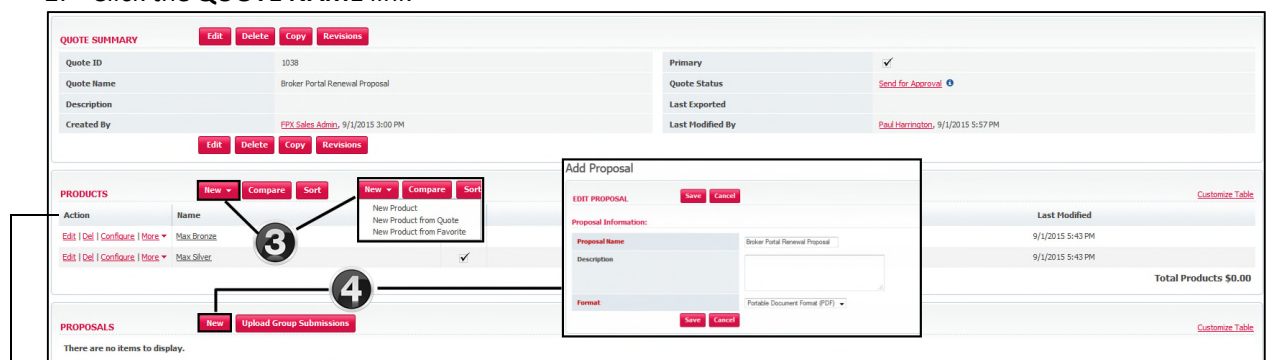
- Login and locate the assigned opportunity within the broker portal



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

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- 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**

Proposal : Broker Portal Renewal Proposal

Proposal Page Help

PROPOSAL SUMMARY Edit Delete Copy View Printable

Proposal Name	Broker Portal Renewal Proposal
Description	
Format	Portable Document Format (PDF)
Created By	Paul Harrington, 9/2/2015 5:43 PM

Edit Delete Copy View Printable

PROPOSAL CONTENTS Manage Contents

Action	Selected Reports
View	Cover Page
View	Message from the President (CMO, etc.) - Existing
View	Small Group Standard Proposal
View	SG Tip Sheet
View	Group Size Form
View	Multi Plan Rate Agreement
View	Benefit Summary

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.

« Home · Opportunities · Broker Portal Renewal · Broker Portal Renewal Proposal · Broker Portal Renewal Proposal
--

Opportunity Summary:

QUOTES New				
Action	Quote Name	Quote ID	Primary	Quote Status
Edit Del More	Broker Portal Renewal Proposal	1095	<input checked="" type="checkbox"/>	Send for Approval i

Quote Summary:

Quote : Broker Portal Renewal Proposal (1038)

[Quote Summary Help](#)
This page allows you to edit a new or existing quote. From this page you can add or edit products. You can also add, edit and attach proposals. [Do not show this again](#)

QUOTE SUMMARY Edit Delete Copy Revisions

Quote ID	1038	Primary	<input checked="" type="checkbox"/>
Quote Name	Broker Portal Renewal Proposal 1	Quote Status	4 Send for Approval i
Description		Last Exported	
Created By	CPQ Sales Admin, 9/1/2015 3:00 PM	Last Modified By	Paul Harriott, 9/1/2015 5:57 PM

Edit Delete Copy Revisions

PRODUCTS New Compare Sort [Customize Table](#)

Action	Name	Included	Created	Last Modified
Edit Del Configure More	Max Bronze 2	<input checked="" type="checkbox"/>	9/1/2015 5:43 PM	9/1/2015 5:43 PM
Edit Del Configure More	Max Silver	<input checked="" type="checkbox"/>	9/1/2015 5:43 PM	9/1/2015 5:43 PM

Total Products \$0.00

PROPOSALS New Upload Group Submissions [Customize Table](#)

Action	Proposal Name	Format	Last Attached	Last Modified
Edit Del View More	Broker Portal Renewal Proposal 3	PDF		9/1/2015 6:58 PM

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)

Workflow: Send for Approval

Please enter a comment.

OK Cancel

Note:

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

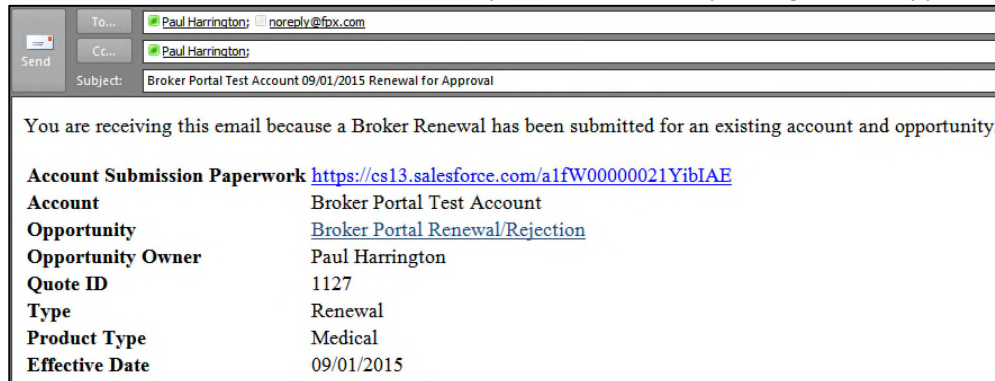
Quote Status	Waiting for Approval i
--------------	-------------------------------------

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

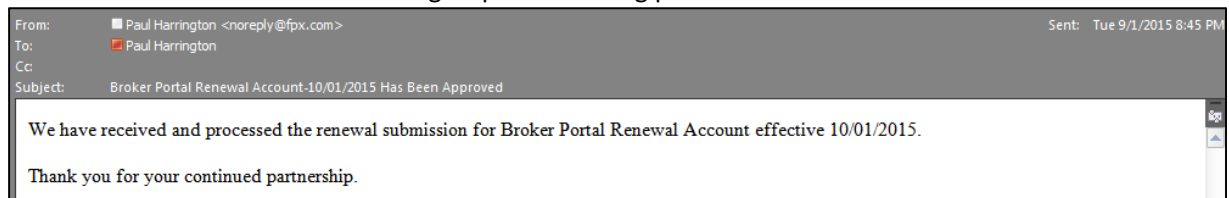
CPQ OnDemand Broker Portal User Guide

- 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

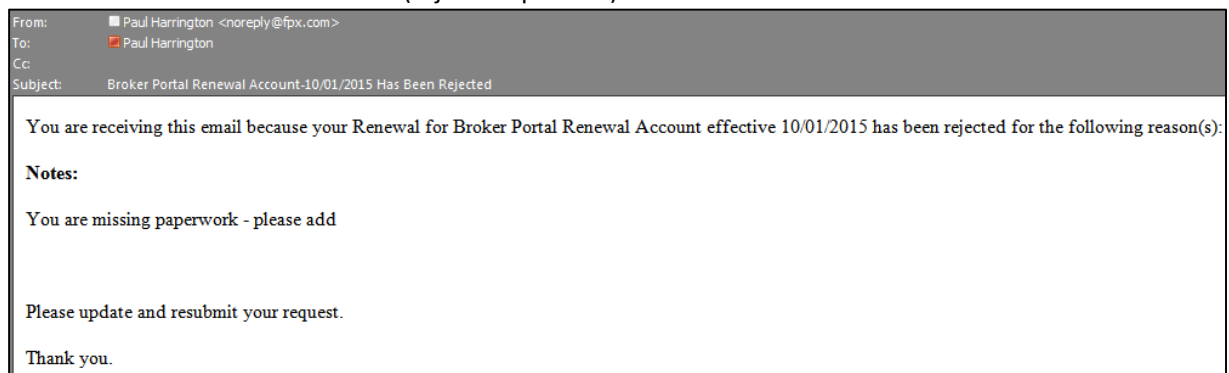


- Within the broker portal you will notice that your renewal quote status on the opportunity summary or quote summary now reflects a status of **Approved**

QUOTES New				
Action	Quote Name	Quote ID	Primary	Quote Status
Edit Del More ▾	Broker Portal Renewal Proposal	1038	✓	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)



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- The quote status now reflects as REJECTED

Quote : Broker Portal Renewal Account - Renewal Quote (1054)

Quote Summary Help
This page allows you to edit a new or existing quote. From this page you can add or edit products. You can also add, edit and attach proposals.

QUOTE SUMMARY		Edit	Delete	Copy	Revisions
Quote ID	1054				
Quote Name	Broker Portal Renewal Account - Renewal Quote				
Description					
Created By	Paul Harrington, 9/1/2015 9:22 PM				
		Edit	Delete	Copy	Revisions
Primary		✓			
Quote Status		Rejected ⓘ			
Last Exported					
Last Modified By		Paul Harrington, 9/1/2015 9:22 PM			

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

QUOTES [New](#) [Customize Table](#)

Action	Quote Name	Quote ID	Primary	Quote Status	Last Modified
Edit Del More	Broker Portal Renewal Account Renewal Quote	1131	✓	Rejected ⓘ	9/4/2015 9:05 AM

PROPOSALS [New](#) [Upload Group Submissions](#)

Action	Proposal Name	Format
Edit Del View More	Test Oppty	PDF

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

Quote : Broker Portal Renewal Account - Renewal Quote (1054)

Quote Summary Help
This page allows you to edit a new or existing quote. From this page you can add or edit products. You can also add, edit and attach proposals.

QUOTE SUMMARY		Edit	Delete	Copy	Revisions
Quote ID	1054				
Quote Name	Broker Portal Renewal Account - Renewal Quote				
Description					
Created By	Paul Harrington, 9/1/2015 9:22 PM				
		Edit	Delete	Copy	Revisions
Primary		✓			
Quote Status		Rejected ⓘ			
Last Exported					
Last Modified By		Paul Harrington, 9/1/2015 9:22 PM			

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

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Quote Summary Edit : Broker Portal Renewal Account

New Quote Help
This page allows you to edit quote information.

QUOTE SUMMARY EDIT **Save** **Cancel**

Quote Information:

Quote ID: 1054

Quote Name: Broker Portal Renewal Account - Re

Description:

Save **Cancel**

2. Click **SAVE**

Quote : Broker Portal Renewal Account - Renewal Quote (1054)

Quote Summary Help
This page allows you to edit a new or existing quote. From this page you can add or edit products. You can also add, edit and attach proposals.

QUOTE SUMMARY **Edit** **Delete** **Copy** **Revisions**

Quote ID	1054	Primary	<input checked="" type="checkbox"/>
Quote Name	Broker Portal Renewal Account - Renewal Quote	Quote Status	3 Send for Approval
Description		Last Exported	
Created By	Paul Harrington, 9/1/2015 9:22 PM	Last Modified By	Paul Harrington, 9/2/2015 12:43 PM

Edit **Delete** **Copy** **Revisions**

Workflow: Send for Approval

Please enter a comment.

Missing paperwork added

OK **Cancel**

Click **OK**

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

Quote : Broker Portal Renewal Account - Renewal Quote (1054)

Quote Summary Help
This page allows you to edit a new or existing quote. From this page you can add or edit products. You can also add, edit and attach proposals.

QUOTE SUMMARY **Edit** **Delete** **Copy** **Revisions**

Quote ID	1054	Primary	<input checked="" type="checkbox"/>
Quote Name	Broker Portal Renewal Account - Renewal Quote	Quote Status	4 Waiting for Approval
Description		Last Exported	
Created By	Paul Harrington, 9/1/2015 9:22 PM	Last Modified By	Paul Harrington, 9/2/2015 12:43 PM

Edit **Delete** **Copy** **Revisions**

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

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Send To... Paul Harrington; noreply@fpx.com
Cc... Paul Harrington;
Subject: Broker Portal Test Account 09/01/2015 Renewal for Approval

You are receiving this email because a Broker Renewal has been submitted for an existing account and opportunity.

Account Submission Paperwork <https://cs13.salesforce.com/alfW00000021YibIAE>

Account	Broker Portal Test Account
Opportunity	Broker Portal Renewal/Rejection
Opportunity Owner	Paul Harrington
Quote ID	1127
Type	Renewal
Product Type	Medical
Effective Date	09/01/2015

- 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

From: Paul Harrington <noreply@fpx.com>
To: Paul Harrington
Cc:
Subject: Broker Portal Renewal Account-10/01/2015 Has Been Approved

We have received and processed the renewal submission for Broker Portal Renewal Account effective 10/01/2015.

Thank you for your continued partnership.

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

QUOTES New				
Action	Quote Name	Quote ID	Primary	Quote Status
Edit Del More ▾	Broker Portal Renewal Proposal	1038	<input checked="" type="checkbox"/>	Approved

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

Opportunities

Opportunities : Open or create new opportunity.

Opportunity List Page Level Help TEXT

- There are many style and format options

This page lists the opportunities. From here you may edit or delete an opportunity or see a summary of the opportunity by clicking the opportunity name.

Search: Opportunity Name For: Go Reset

View: All ☐ Show only my opportunities

OPPORTUNITIES New

Action	Opportunity Name	# of Products	Export Status
Edit More ▾	Broker Portal Renewal	2	Completed

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

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Opportunity Summary : View or edit Opportunity information.

This page allows you to view or edit an opportunity. A summary of the opportunity is located in the top section, and a list of the quotes within the opportunity is displayed below that. You may edit or add quotes from this page.

Account Name	Broker Portal Renewal Account	Street	123 Wondering Lane
Opportunity Name	Broker Portal Renewal	City	Hopington
Opportunity Owner ?	Paul Harrington Change	State	NY
Effective Date (this must be set to the first day of the month) ?	10/1/2015	Zip/Postal Code	12345
Type	Renewal		
Product Type	Medical		
Quote Name	Broker Portal Renewal Proposal	Export Status	Not exported
Quote ID	1038		
Created By	Don Scott , 9/1/2015 9:35 AM	Last Modified By	Paul Harrington , 9/16/2015 4:59 PM

QUOTES [New](#) **2**

Action	Quote Name	Quote ID	Primary	Quote Status
Edit Del More	Broker Portal Renewal Proposal	1038	<input checked="" type="checkbox"/>	Approved ⓘ

2. Click NEW

Add Quote

This page allows you to edit quote information.

QUOTE SUMMARY EDIT [Save](#) [Cancel](#)

Quote Information:

Quote Name **3** Off Cycle Plan Change Broker Rer

Description

[Save](#) [Cancel](#)

3. Enter a QUOTE NAME and Click SAVE

Quote : Off Cycle Plan Change Broker Renewal Account (1103)

Quote Summary Help
This page allows you to edit a new or existing quote. From this page you can add or edit products. You can also add, edit

QUOTE SUMMARY	Edit Delete Copy Make Primary Revisions
Quote ID	1103
Quote Name	Off Cycle Plan Change Broker Renewal Account
Description	Off Cycle Plan Addition
Created By	Paul Harrington , 9/2/2015 8:04 PM

[Edit](#) [Delete](#) [Copy](#) [Make Primary](#) [Revisions](#)

PRODUCTS [New](#) [Compare](#) [Sort](#) **4**

There are no items to display.

PROPOSALS [New](#)

There are no items to display.

4. Click NEW – NEW PRODUCT

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

Description	Single	Employee + Spouse	Employee + Child (ren)	Family
<input checked="" type="checkbox"/> Domestic Partner	\$350.27	\$700.54	\$595.46	\$998.27
<input type="checkbox"/> Domestic Partner, Age 29	\$353.61	\$707.22	\$601.14	\$1,007.79
<input type="checkbox"/> Domestic Partner, Age 29, No Family Planning	\$352.84	\$705.68	\$599.83	\$1,005.59
<input type="checkbox"/> Domestic Partner, No Family Planning	\$349.51	\$699.02	\$594.17	\$996.10
<input type="checkbox"/> Age 29, No Family Planning	\$352.84	\$705.68	\$599.83	\$1,005.59
<input type="checkbox"/> Age 29	\$353.61	\$707.22	\$601.14	\$1,007.79
<input type="checkbox"/> No Family Planning	\$349.51	\$699.02	\$594.17	\$996.10
<input type="checkbox"/> Base	\$350.27	\$700.54	\$595.46	\$998.27

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

Action	Name	Included
Edit Del Configure More	Standard Bronze	<input checked="" type="checkbox"/>

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

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PROPOSALS [New](#) [Upload Group Submissions](#)

There are no items to display.

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

Add Proposal

EDIT PROPOSAL [Save](#) [Cancel](#)

Proposal Information:

Proposal Name

Description

Format

[Save](#) [Cancel](#)

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

[Home](#) > [Opportunities](#) > [Broker Portal Renewal](#) > [Off Cycle Plan Change Broker Renewal Account](#) > Off Cycle Plan Change Proposal

Proposal : Off Cycle Plan Change Proposal

Proposal Page Help

PROPOSAL SUMMARY [Edit](#) [Delete](#) [Copy](#) [View Printable](#)

Proposal Name Off Cycle Plan Change Proposal

Description

Format Portable Document Format (PDF)

Created By Paul Harrington, 9/2/2015 8:35 PM

[Edit](#) [Delete](#) [Copy](#) [View Printable](#)

PROPOSAL CONTENTS [Manage Contents](#)

Action	Selected Reports
View	Cover Page
View	Message from the President (CMO, etc.) - Existing
View	Small Group Standard Proposal
View	SG Tip Sheet
View	Group Size Form
View	Multi Plan Rate Agreement
View	Benefit Summary

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

Quote : Off Cycle Plan Change Broker Renewal Account (1103)

This page allows you to edit a new or existing quote. From this page you can add or edit products. You can also add, edit and attach proposals. [Do not show this again.](#)

QUOTE SUMMARY [Edit](#) [Delete](#) [Copy](#) [Revisions](#)

Quote ID	1103	Primary	<input checked="" type="checkbox"/>
Quote Name	Off Cycle Plan Change Broker Renewal Account	Quote Status	Send for Approval
Description	Off Cycle Plan Addition	Last Exported	9/2/2015 8:58 PM
Created By	Paul Harrington, 9/2/2015 8:04 PM	Last Modified By	Paul Harrington, 9/2/2015 11:32 AM

[Edit](#) [Delete](#) [Copy](#) [Revisions](#)

PRODUCTS [New](#) [Compare](#) [Sort](#) [Customize Table](#)

Action	Name	Included	Created	Last Modified
Edit Del Configure More	Standard Bronze	<input checked="" type="checkbox"/>	9/2/2015 8:23 PM	9/2/2015 11:08 AM

Total Products \$0.00

PROPOSALS [New](#) [Upload Group Submissions](#)

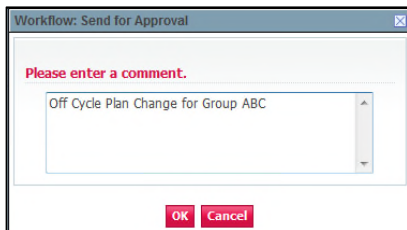
Action	Proposal Name	Format	Last Modified
Edit Del View More	Off Cycle Plan Change Proposal	PDF	9/2/2015 8:35 PM

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

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The Quote Status has updated to **SEND FOR APPROVAL** (Link)

- The below dialogue box will appear – Click **OK**
(Comment Recommended)



A dialog box titled "Workflow: Send for Approval" with a close button (X). It contains a red prompt "Please enter a comment." and a text area with the text "Off Cycle Plan Change for Group ABC". At the bottom are "OK" and "Cancel" buttons.



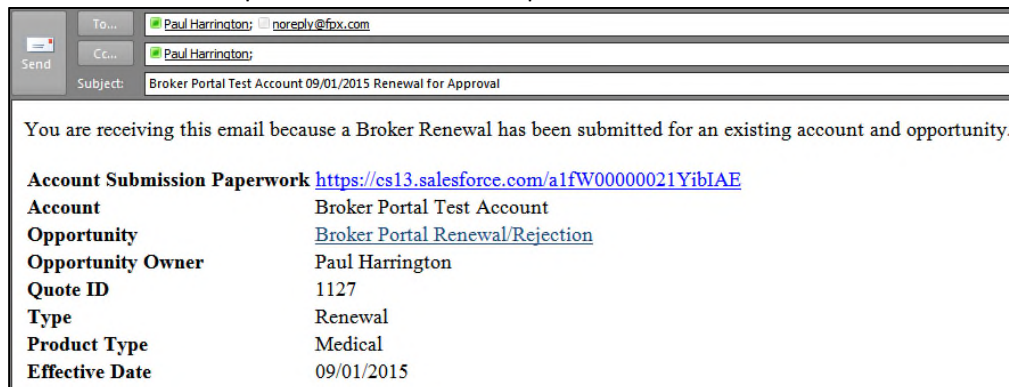
Quote : Off Cycle Plan Change Broker Renewal Account (1103)

Quote Summary Help
This page allows you to edit a new or existing quote. From this page you can add or edit products. You can also add, edit and attach proposals.

QUOTE SUMMARY		Edit	Delete	Copy	Revisions
Quote ID	1103				
Quote Name	Off Cycle Plan Change Broker Renewal Account				
Description	Off Cycle Plan Addition				
Created By	Paul Harrington, 9/2/2015 8:04 PM				
Primary	12				
Quote Status	Waiting for Approval				
Last Exported					
Last Modified By	Paul Harrington, 9/2/2015 8:48 PM				

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



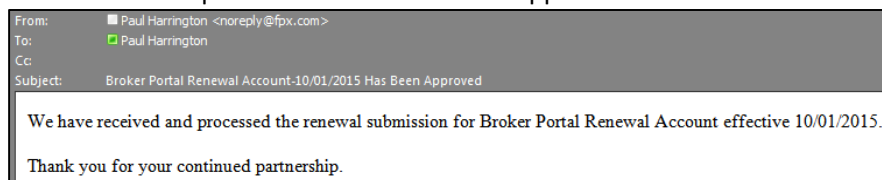
Send To... Paul Harrington; noreply@fpx.com
Cc... Paul Harrington;
Subject: Broker Portal Test Account 09/01/2015 Renewal for Approval

You are receiving this email because a Broker Renewal has been submitted for an existing account and opportunity.

Account Submission Paperwork <https://cs13.salesforce.com/a1fW00000021YibIAE>

Account	Broker Portal Test Account
Opportunity	Broker Portal Renewal/Rejection
Opportunity Owner	Paul Harrington
Quote ID	1127
Type	Renewal
Product Type	Medical
Effective Date	09/01/2015

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



From: Paul Harrington <noreply@fpx.com>
To: Paul Harrington
Cc:
Subject: Broker Portal Renewal Account-10/01/2015 Has Been Approved

We have received and processed the renewal submission for Broker Portal Renewal Account effective 10/01/2015.

Thank you for your continued partnership.

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

CPQ OnDemand Broker Portal User Guide

Quote Summary View:

Quote : Off Cycle Plan Change Broker Renewal Account (1103)

Quote Summary Help
This page allows you to edit a new or existing quote. From this page you can add or edit products. You can also add, edit and attach proposals.

QUOTE SUMMARY		Edit Delete Copy Revisions	
Quote ID	1103	Primary	<input checked="" type="checkbox"/>
Quote Name	Off Cycle Plan Change Broker Renewal Account	Quote Status	Approved
Description	Off Cycle Plan Addition	Last Exported	9/2/2015 8:58 PM
Created By	Paul Harrington, 9/2/2015 8:04 PM	Last Modified By	Paul Harrington, 9/2/2015 8:58 PM

Edit Delete Copy Revisions

Opportunity Summary View:

Opportunity Summary : View or edit Opportunity information.

Opportunity Summary Help --> This page allows you to view or edit an opportunity. A summary of the opportunity is located in the top section, and a list of the quotes within the opportunity is displayed below that. You may edit or a

Edit Copy Revisions			
Account Name	Broker Portal Renewal Account	Street	123 Wondering Lane
Opportunity Name	Broker Portal Renewal	City	Hopington
Opportunity Owner	Paul Harrington Change	State	NY
Effective Date (this must be set to the first day of the month)	10/1/2015	Zip/Postal Code	12345
Type	Renewal		
Product Type	Medical		
Quote Name	Off Cycle Plan Change Broker Renewal Account	Export Status	Completed
Quote ID	1103		
Created By	Paul Harrington, 9/2/2015 5:41 PM	Last Modified By	Paul Harrington, 9/2/2015 8:58 PM

Edit Copy Revisions

QUOTES [New](#)

Action	Quote Name	Quote ID	Primary	Quote Status
Edit Del More	Broker Portal Renewal Account - Renewal Quote	1099	<input type="checkbox"/>	Approved
Edit Del More	Off Cycle Plan Change Broker Renewal Account	1103	<input checked="" type="checkbox"/>	Approved

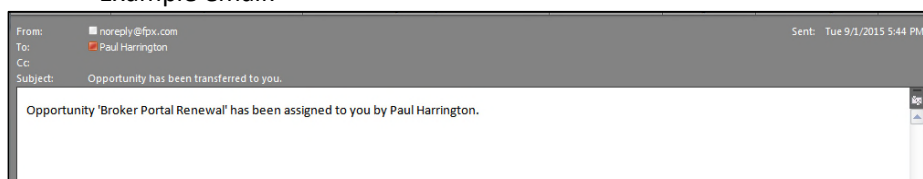
Note:

- 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

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- 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

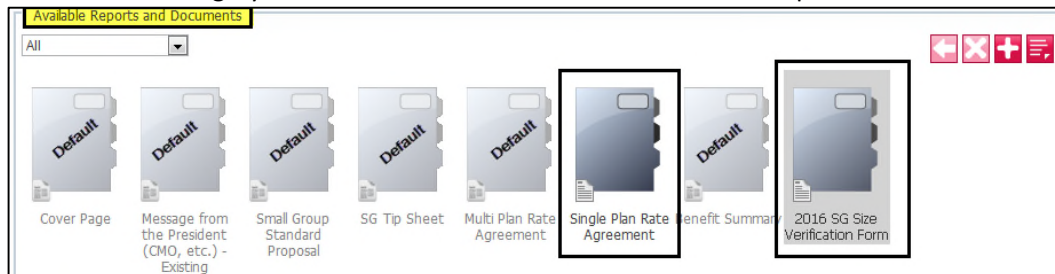
PROPOSAL CONTENTS	
Manage Contents	
Action	Selected Reports
View	Cover Page
View	Message from the President (CMO, etc.) - Existing
View	Small Group Standard Proposal
View	SG Tip Sheet
View	Group Size Form
View	Multi Plan Rate Agreement
View	Benefit Summary

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

PROPOSAL CONTENTS	
Proposal Contents	
↑ ↓ ✕ +	
	Cover Page
	Message from the P
	Small Group Standar
	SG Tip Sheet
	2016 New Small Gro
	Multi Plan Rate Agre
	Benefit Summary

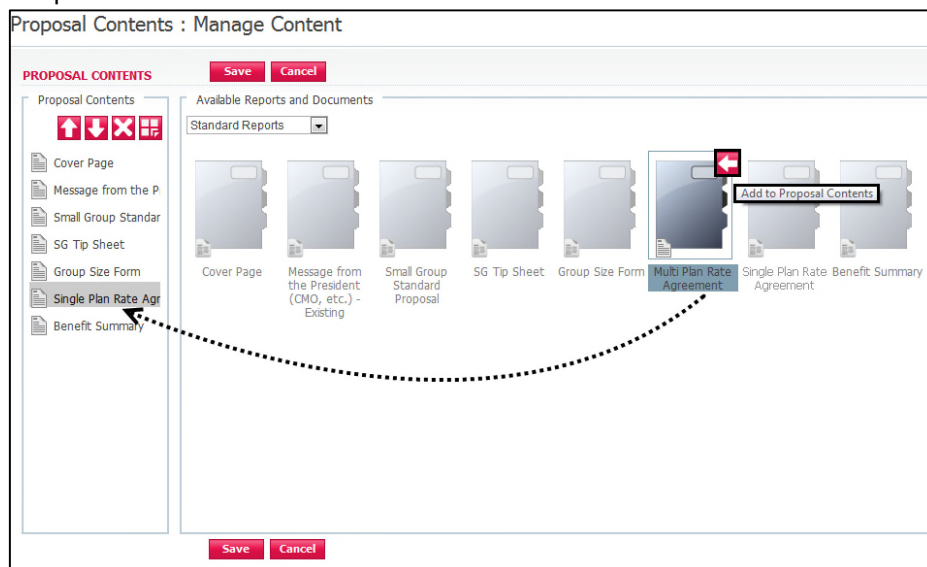
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- Below the (available reports and documents) displays selectable collateral that can be included in the proposal
- Grayed out icons within the library are defaulted and not selectable or removable
 - Icons not greyed out can be added or removed from the Proposal Content list



How do I manage collateral in the libraries?

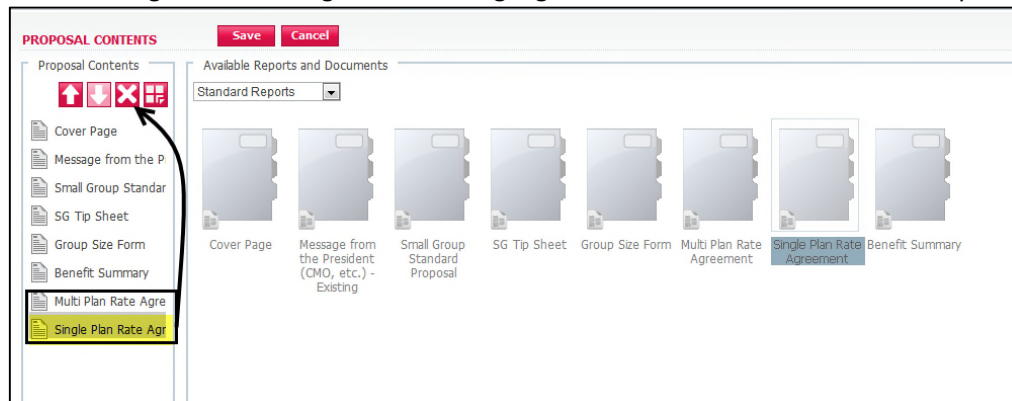
- There are a number of ways to manage collateral within the Standard Reports library
- Select the Multi-Plan Rate Agreement and arrow will appear in the top right corner of the icon
- Click on the arrow to move the selected Multi Plan Rate Agreement into the Proposal Contents pane




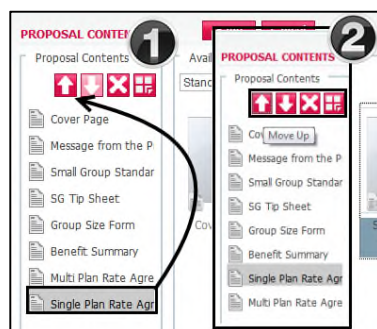
- You have successfully added the Multi Plan Rate Agreement, but will need to now remove the Single Plan Rate Agreement


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- Click Single Plan Rate Agreement to highlight and click  to remove from the pane

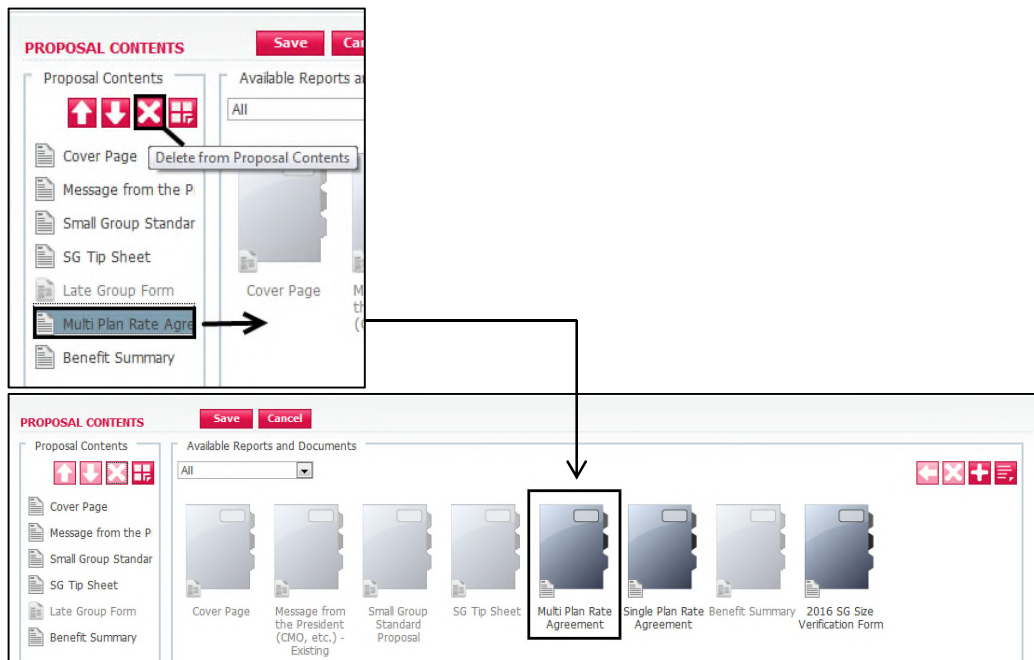


- You will now need to re-order the collateral to ensure the proposal you send to your customer is ordered appropriately
- Selecting Single Plan Rate Agreement – click on  to move the letter up in the list



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


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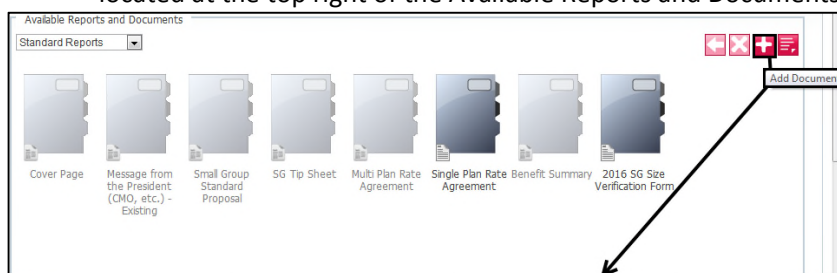


Managing file attachments:

- 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



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Add Document in Document Library

PDF is the only file type accepted for upload

Select File:

☒ Enter the path of the file or click Browse to find the file.

File to upload C:\Users\pharrin\Desktop\TEST Upload .pdf **Browse...**

Or

☐ Enter the URL of the file

URL

Upload to Document Library ☐

Document details:

Document Name Test Document Upload

Description

Document Library Availability

Add to Proposal Contents

This Opportunity Only

This Opportunity Only

My Document Library

☐

Save **Cancel**

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

PROPOSAL CONTENTS

Save Cancel

Proposal Contents

Available Reports and Documents

All

Cover Page

Message from the President

Small Group Standard

SG Tip Sheet

Late Group Form

Multi Plan Rate Agreement

Benefit Summary

Test Upload Document

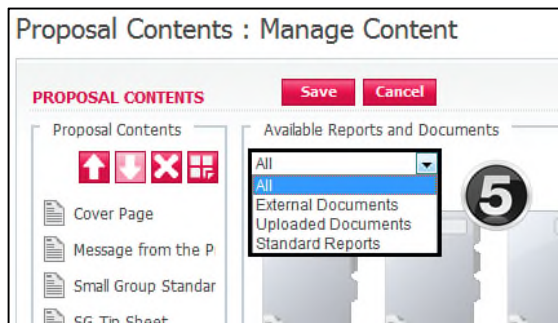
Test Upload Document

Add to Proposal Contents

4

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

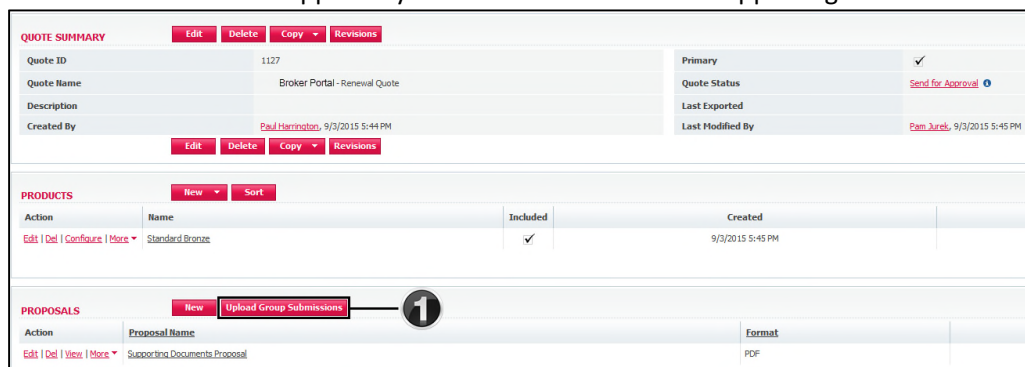
CPQ OnDemand Broker Portal User Guide



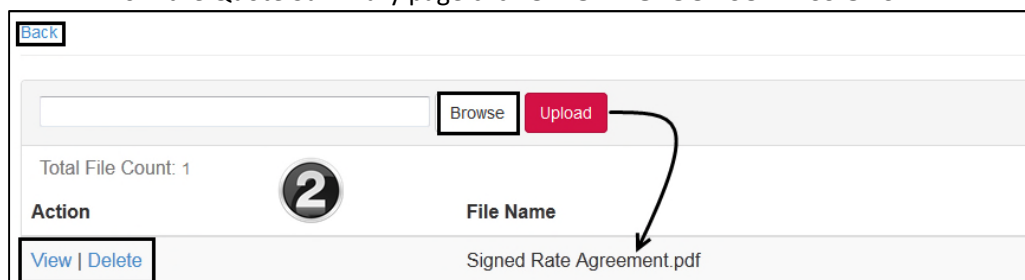
5. There are 3 listed libraries
 - **All** = all documents will be displayed (Standard & Uploaded)
 - **External** = library will NOT be used
 - **Uploaded documents** = documents you have uploaded
 - **Standard** = all default documents required to support the proposal

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.

Opportunities : Change owner of opportunity

OPPORTUNITY Save Cancel

Select New Owner:

Opportunity Broker Portal Test

New Owner Paul Harrington

Send Notification Email ☒

Save Cancel

CPQ OnDemand Broker Portal User Guide

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

QUOTES New Customize Table					
Action	Quote Name	Quote ID	Primary	Quote Status	Last Modified
Edit Del More	Broker Portal Renewal Account - Renewal Quote	1099	<input type="checkbox"/>	Approved 3	9/16/2015 8:56 AM
Edit Del More	Off Cycle Plan Change Broker Renewal Account	1103	<input checked="" type="checkbox"/>	Approved 3	9/16/2015 8:56 AM
Edit Del More	Standard Reports	1104	<input type="checkbox"/>	Invalid 3	9/2/2015 9:18 PM

QUOTE SUMMARY		Edit	Delete	Copy	Make Primary	Revisions
Quote ID	1099					
Quote Name	Broker Portal Renewal Account - Renewal Quote					
Description						
Created By	Paul Harrington, 9/2/2015 5:41 PM					
		Edit	Delete	Copy	Make Primary	Revisions

QUOTES New					
Action	Quote Name	Quote ID	Primary		
Edit Del More	Broker Portal Renewal Account - Renewal Quote	1099	<input checked="" type="checkbox"/>		
Edit Del More	Off Cycle Plan Change Broker Renewal Account	1103	<input type="checkbox"/>		
Edit Del More	Standard Reports	1104	<input type="checkbox"/>		

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

PRODUCTS New Compare Sort Customize Table				
Action	Name	Included	Created	Last Modified
Edit Del Configure More	Standard Bronze	<input checked="" type="checkbox"/>	9/15/2015 2:19 PM	9/15/2015 2:19 PM
Edit Del Configure More	Direct Silver Copay	<input type="checkbox"/>	9/15/2015 2:20 PM	9/15/2015 2:20 PM
Edit Del Configure More	Direct Gold	<input checked="" type="checkbox"/>	9/15/2015 2:20 PM	9/15/2015 2:20 PM
Total Products \$0.00				

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

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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, you will be dropped back to the FPX login page
- Simply log back into the portal

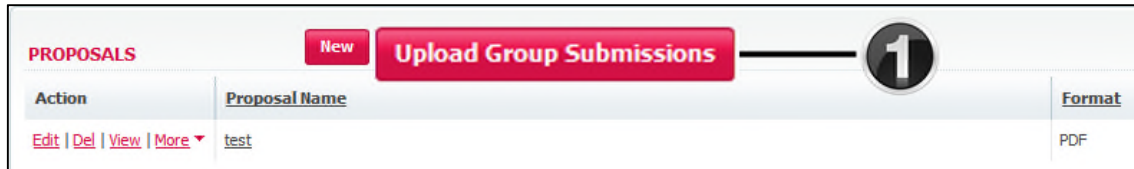
Printing Web Page:

- 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

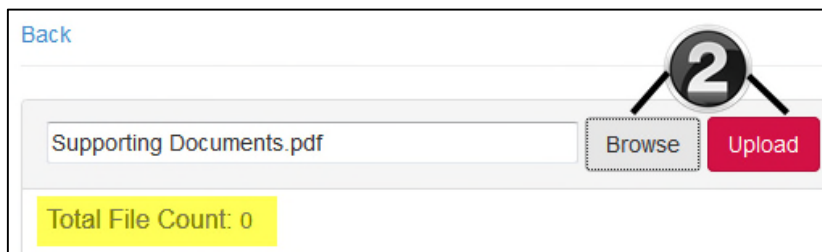
CPQ OnDemand Broker Portal User Guide

Use of Upload Group Submissions Feature:

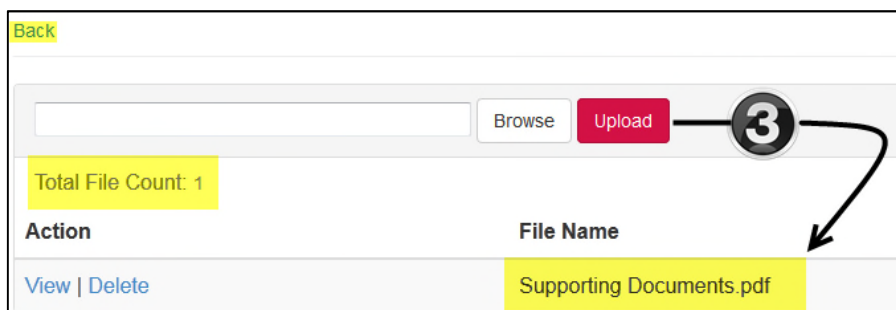
- The below steps outline the use of Upload Group Submissions functionality to include the required paperwork with your opportunity (e.g. – signed Rate Agreement)



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

CPQ OnDemand Broker Portal User Guide

Printing Proposals:

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

Opportunity Summary : View or edit Opportunity information.

This page allows you to view or edit an opportunity. A summary of the opportunity is located in the top section, and a list of the quotes within the opp

Edit Delete Copy

Account Name	Print my Proposal
Opportunity Name	Tips for Printing
Opportunity Owner ?	P. Harringtonx [Change]
Effective Date (this must be set to the first day of the month) ?	11/1/2015
Type	New Plan Offering
Product Type	Medical
Quote Name	Print my Proposal
Quote ID	1837
Created By	P. Harringtonx , 10/27/2015 10:17 AM

Edit Delete Copy

QUOTES New

Action	Quote Name	Quote ID	Primary
<a>Edit <a>Del <a>More ▼	Print my Proposal	1837	<input checked="" type="checkbox"/>

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

Proposal : Print my Proposal

PROPOSAL SUMMARY Edit Delete Copy View Printable

Proposal Name	Print my Proposal
Description	
Format	Portable Document Format (PDF)
Created By	P. Harringtonx , 10/27/2015 11:01 AM

Edit Delete Copy View Printable

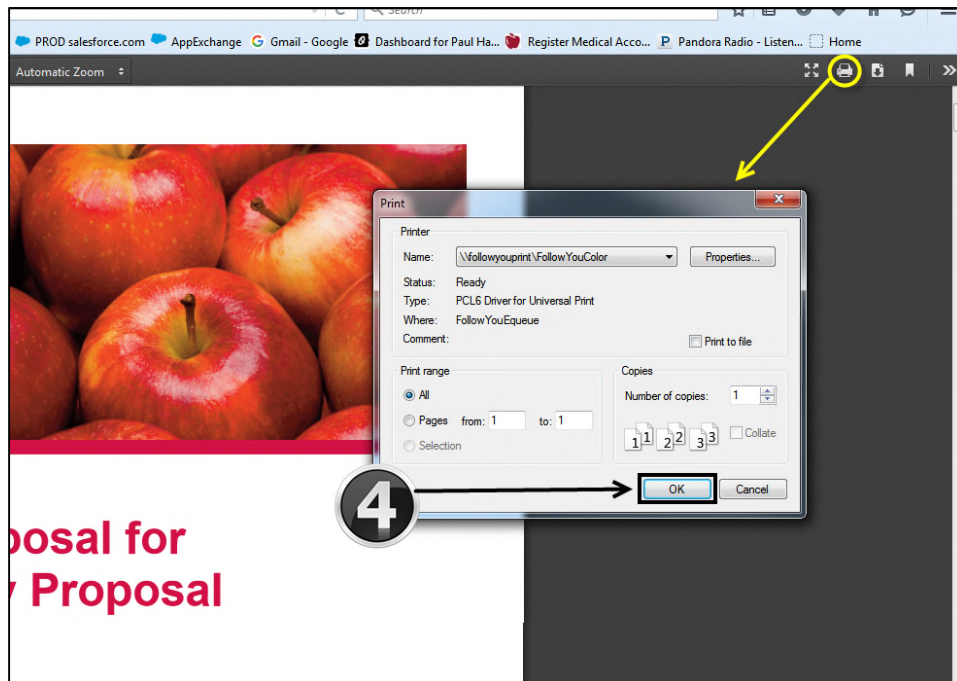
PROPOSAL CONTENTS Manage Contents

Action	Selected Reports
View	Cover Page
View	Message from the President (CMO, etc.) - New
View	Small Group Standard Proposal
View	SG Tip Sheet
View	Multi Plan Rate Agreement
View	Benefit Summary

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

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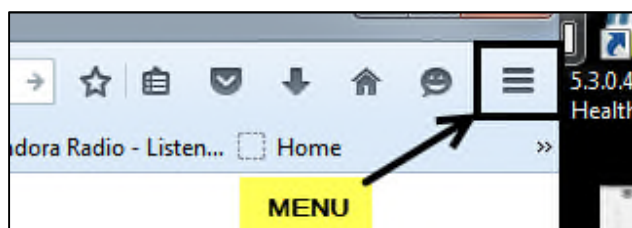
Mozilla Firefox:



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

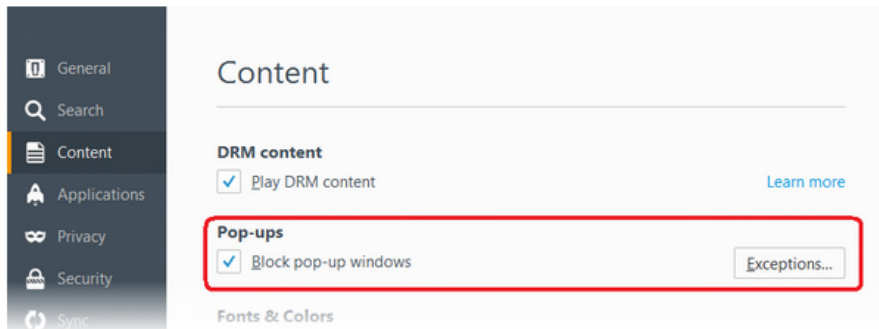


CPQ OnDemand Broker Portal User Guide

Pop-up blocker settings

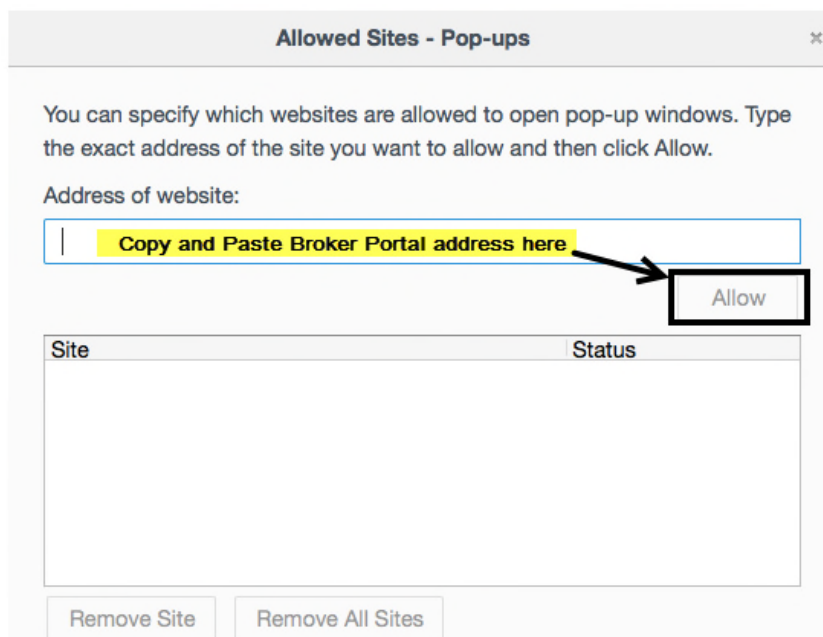
To access the pop-up blocker settings:

1. Click the menu button  and choose **Options**.
2. Select the **Content** panel.



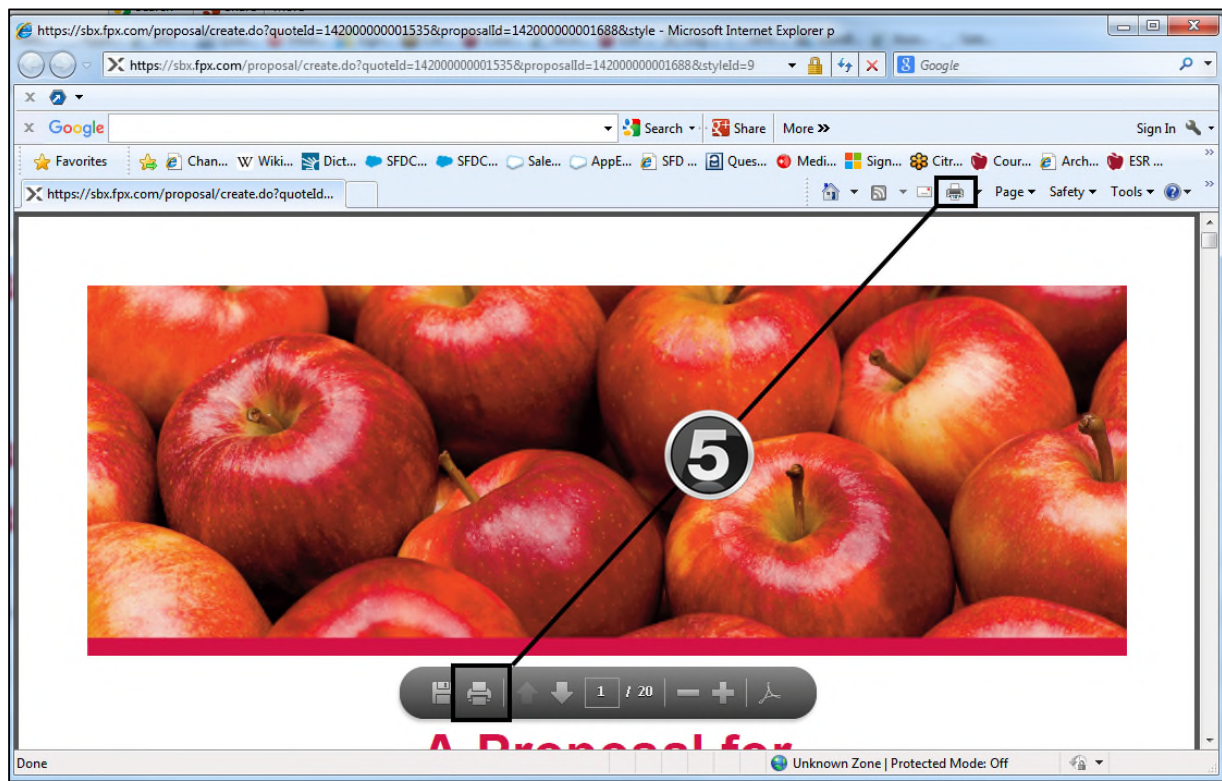
In the content panel:

- **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.



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Internet Explorer:



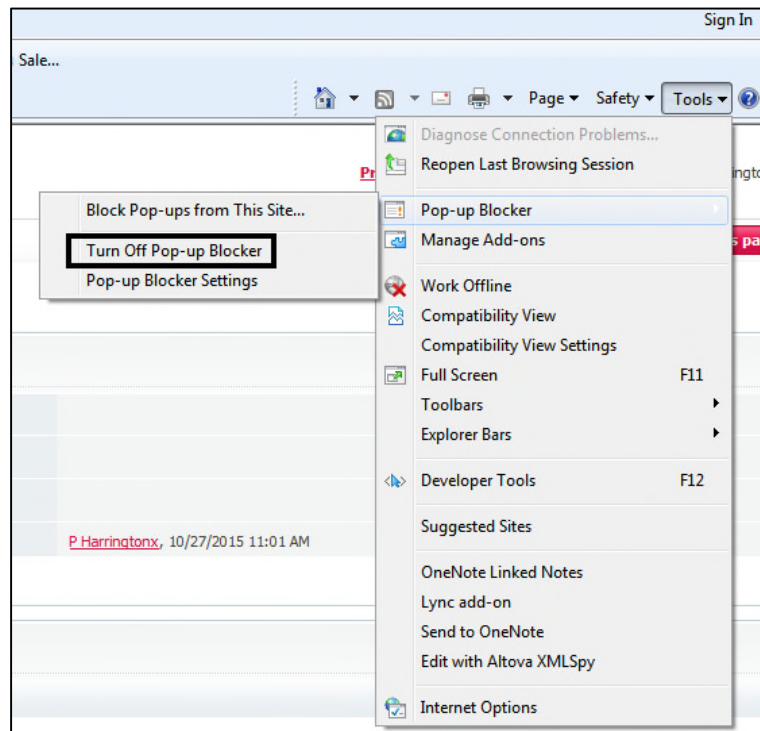
5. Click **VIEW PRINTABLE**

- As the proposal opens, click print icon located at the top of your page
- 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**

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-END-