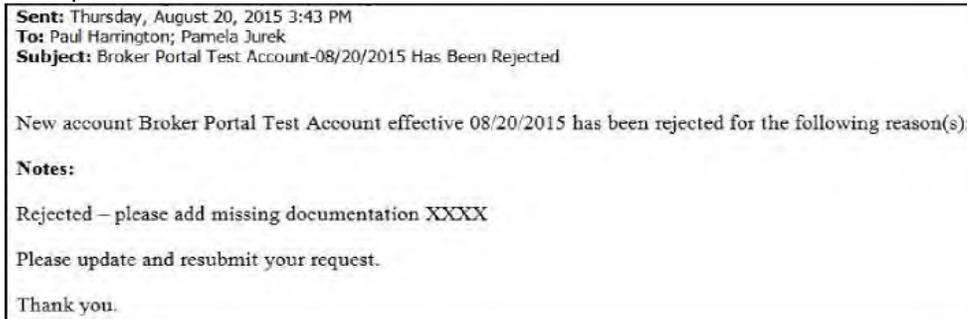




CPQ OnDemand Rejection Process:

- In the event your quote submission has been rejected by the Independent Health Sales team, you will receive an email notifying you why the submission was rejected ((below is an example of the email notification of the rejected group submission)
- Your quote status will also reflect – **REJECTED**



Resubmission Process:

- Review the rejected notes. You will now need to address the noted discrepancy to resubmit your quote for approval (e.g. attach documents, provide the missing information, etc.)
- Return to the Quote Summary:

The screenshot shows the 'QUOTE SUMMARY' section with the following details:

- Quote ID: 1138
- Quote Name: Broker Portal Test
- Description: [Blank]
- Created By: Paul Harrington, 9/4/2015 10:41 AM
- Primary: [Checked]
- Quote Status: Rejected
- Last Exported: [Blank]
- Last Modified By: Paul Harrington, 9/4/2015 10:41 AM

Below the quote summary is the 'PRODUCTS' section, which includes a table with the following data:

Action	Name	Included	Created	Last Modified
Edit Del Configure More	Standard Bronze	✓	9/4/2015 10:41 AM	9/4/2015 10:41 AM

Total Products \$0.00

Below the products section is the 'PROPOSALS' section, which includes a table with the following data:

Action	Proposal Name	Format	Last Modified
Edit Del View More	Broker Portal Test Proposal	PDF	9/4/2015 10:41 AM

- Review the products that are included in your quote, if they have the blue “UPDATE” link (example below), you must take action by clicking the “UPDATE” link for **each** product. After clicking the “UPDATE” link, you will then have to click the “DONE” button. After doing this for all products, the “UPDATE” links will not appear.

Action	Description	Included	Created	Last Modified	Coverage_Summary
Edit Del Configure More	Elite Platinum	✓	10/6/2021 11:46 AM	10/22/2021 1:23 PM	Domestic Partner
Edit Del Configure More	Direct Gold Copay HSAQ	✓	10/6/2021 11:46 AM	10/6/2021 11:46 AM	Domestic Partner
Edit Del Configure Update More	Activate Gold	✓	10/6/2021 11:47 AM	10/6/2021 11:47 AM	Domestic Partner
Edit Del Configure Update More	Direct Silver Concurrence HSAQ	✓	10/6/2021 11:47 AM	10/6/2021 11:47 AM	Domestic Partner

Total Products \$0.00

- 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)

Action	Proposal Name	Format	Last Modified
Edit Del View More	Broker Portal Test Proposal	PDF	9/4/2015 10:52 AM

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

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

Proposal Name: Broker Portal Test Proposal

Description: [Redacted]

Format: Portable Document Format (PDF)

Created By: Paul Harrington, 9/4/2015 10:41 AM

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

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)

Edit Proposal : Broker Portal Test Proposal

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

Proposal Information:

Proposal Name:

Description:

Format: Portable Document Format (PDF)

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



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

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

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

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

Workflow: Send for Approval

Please enter a comment.

Missing paperwork added

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

6. The quote status has now been updated to **Waiting for Approval**

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

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

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

- The Independent Health Sales Team will now receive email notification requesting the approval
- Once the quote is approved by IHA, an email notification will be sent to you confirming the 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