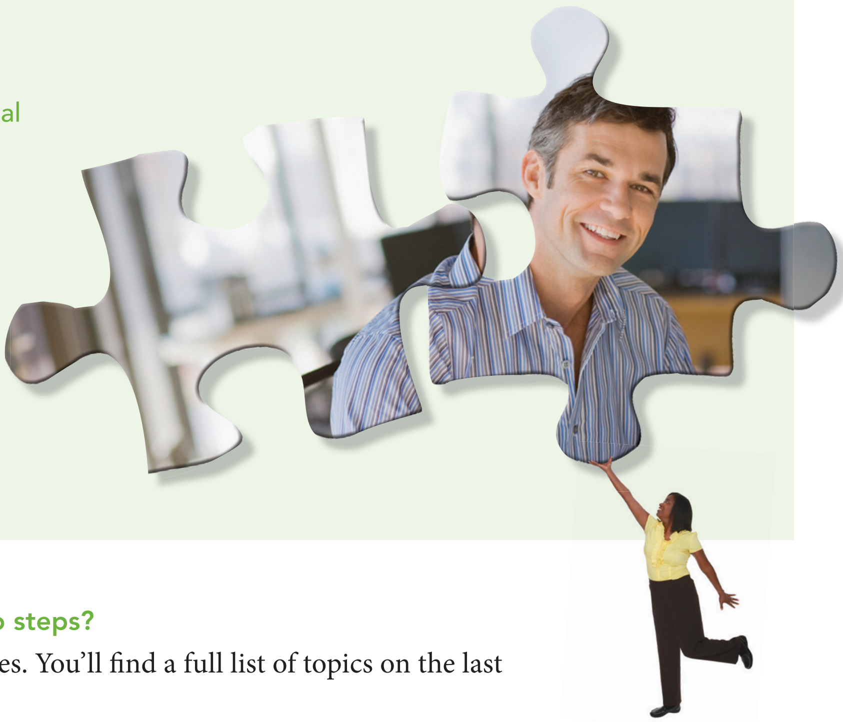
Sales Web Portal

Quick Reference Guide

Small Business Group

Sales Web Portal (SWP) lets you do your own quoting and generate proposals 24/7 to speed your small group sales! This guide tells you how.



Patrice Holloway, Health Net
We support your business with local, dedicated teams.

Need more details or how-to steps?
Check out our SWP video series. You'll find a full list of topics on the last page of this guide.

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Section 1

Fast Path

to Sales Web Portal

1

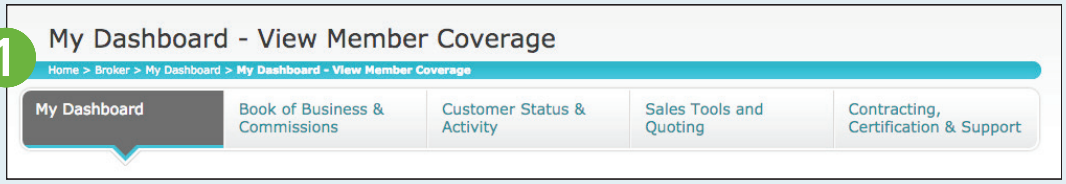
Log in to your broker account on HealthNet.com to pull up your dashboard.

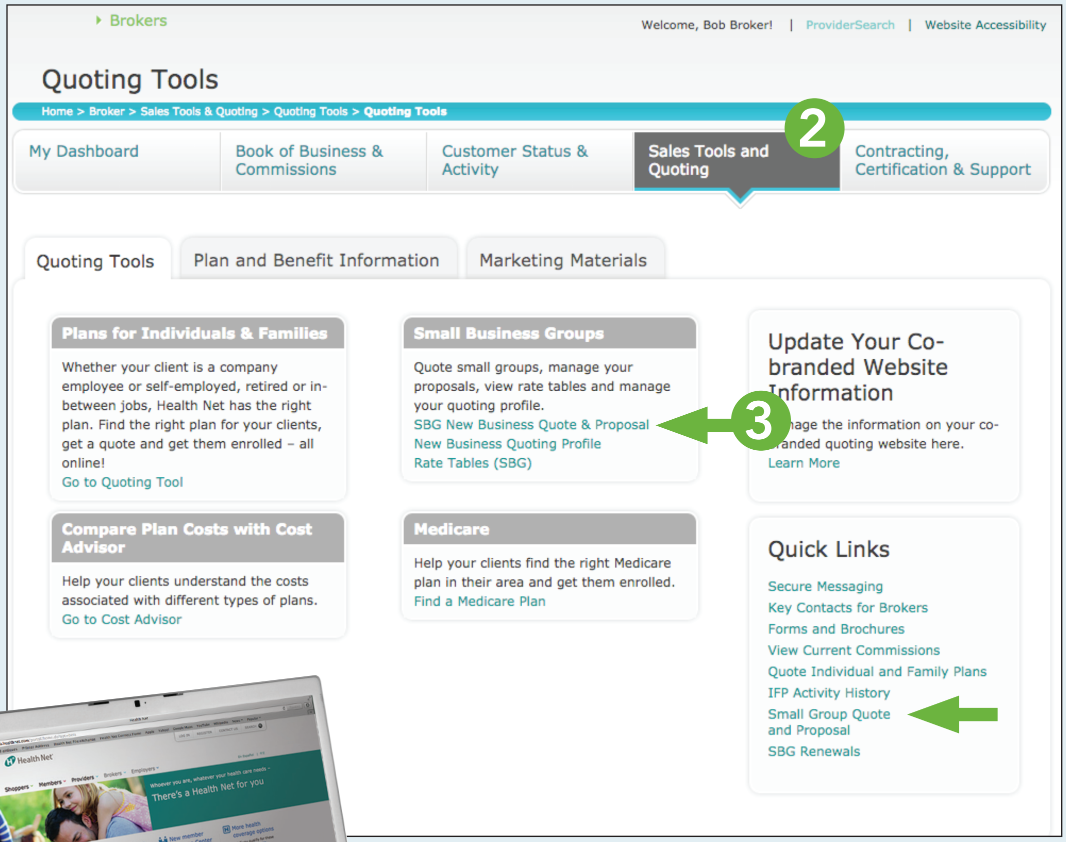
2

Then click *Sales Tools and Quoting* from the menu bar.

3

Click on *SBG New Business Quote & Proposal* under Small Business Groups, or click *Small Group Quote and Proposal* under Quick Links to go right to Sales Web Portal.





Andre Hamil, Health Net

We partner with you to promote workforce health.

Section 2

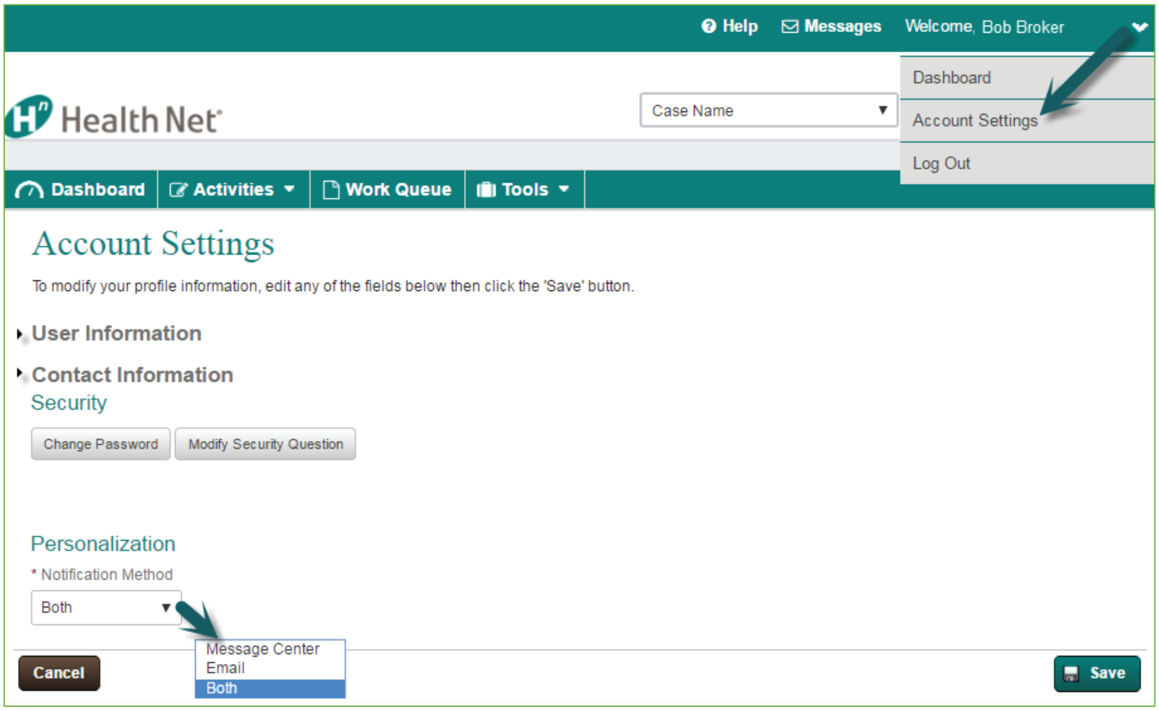
Favorite Tips & Tricks

Logins Are Case-Sensitive

Login and signature fields are case-sensitive. For example, if your password is GoSell*, then gosell* won't work. Both the G and S must be capped.

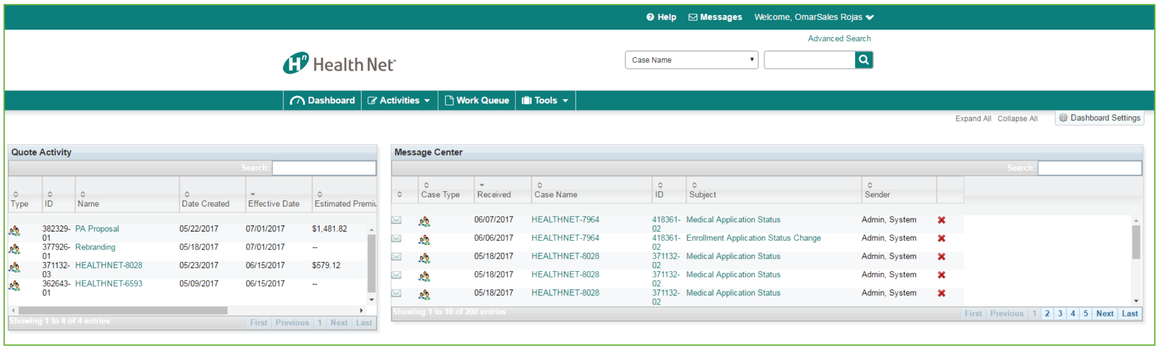
Account Settings

- The first time you use Sales Web Portal (SWP), add your details to this page.
- Be sure to tell us how you'd like to receive updates.



Dashboard

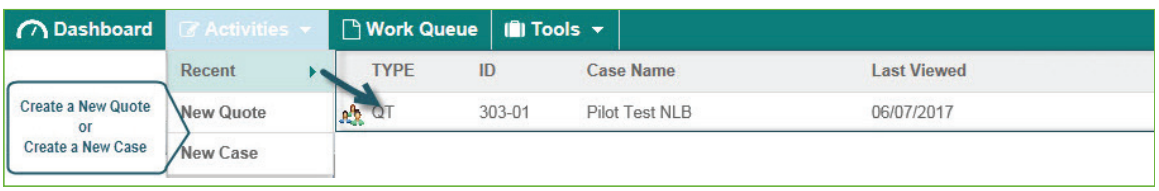
- Your dashboard will be blank the first time you use SWP. You'll see "No data was found. Please check again later." for both the Message Center and Quote Activity.



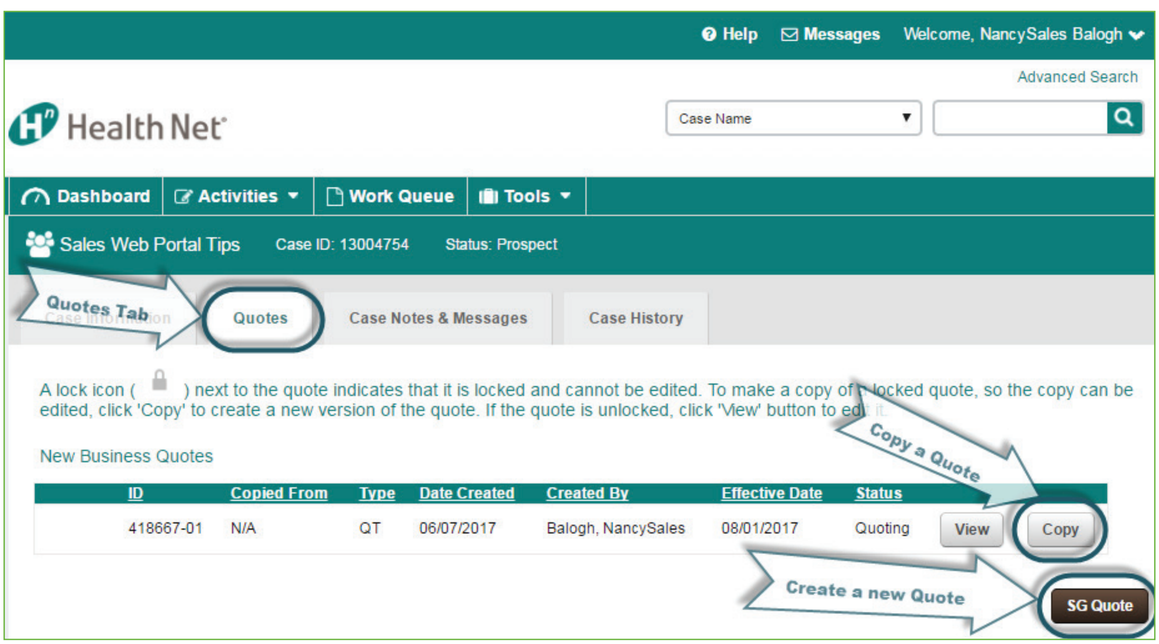
- Your dashboard will populate with your information once you start quoting in the system.
- You can customize the look of your dashboard by using any of the layout design templates. Select *Dashboard Settings* from the SWP menu to customize.

Create Case vs. New Quote

The **Create Case** option saves you time in the long run. You create a profile once for the group. SWP will pre-populate the info for each quote so you don't have to re-enter it every time.

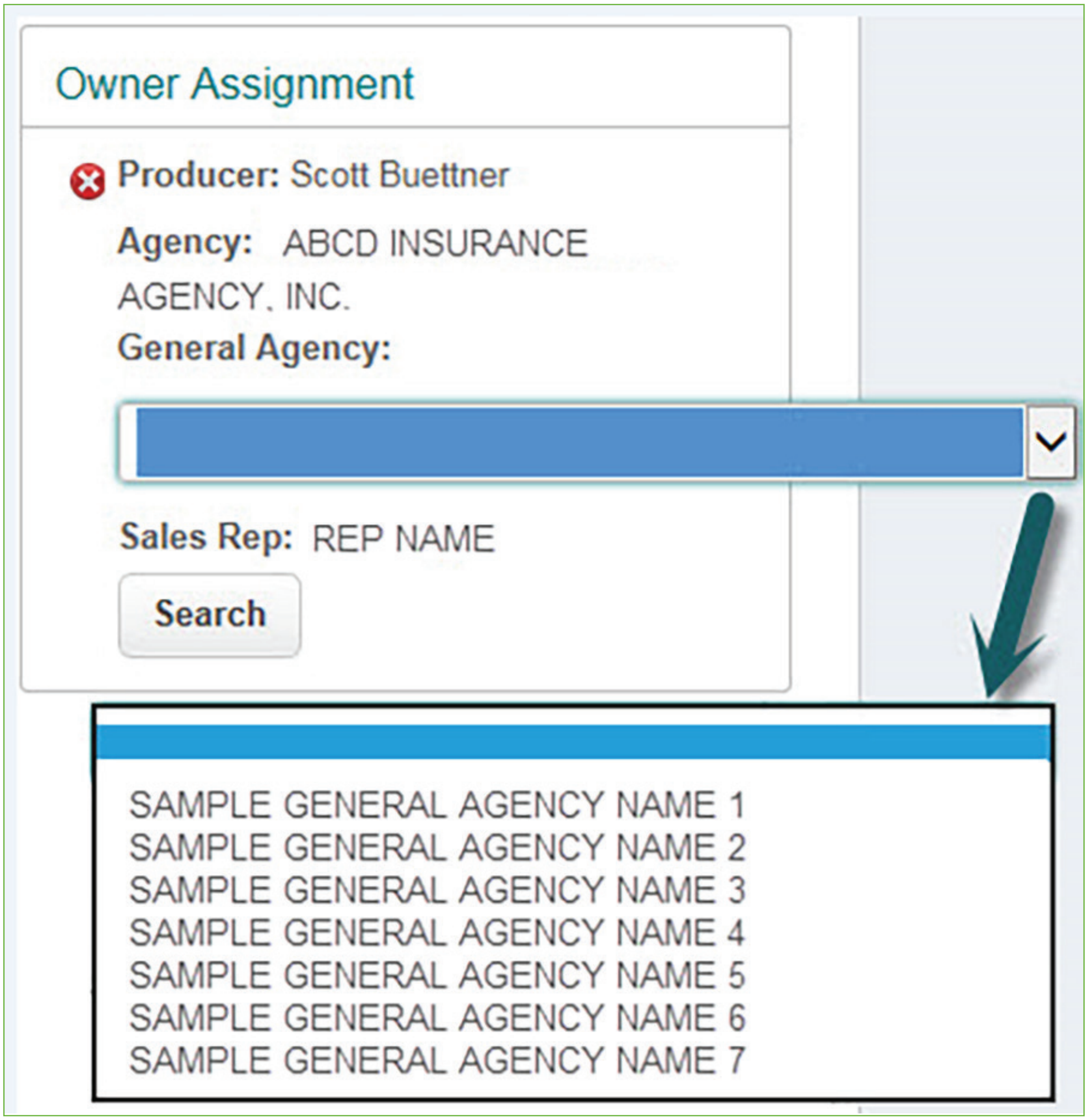


Select the *SG Quote* button from the Quotes tab on the Case Information page.



Owner Assignment

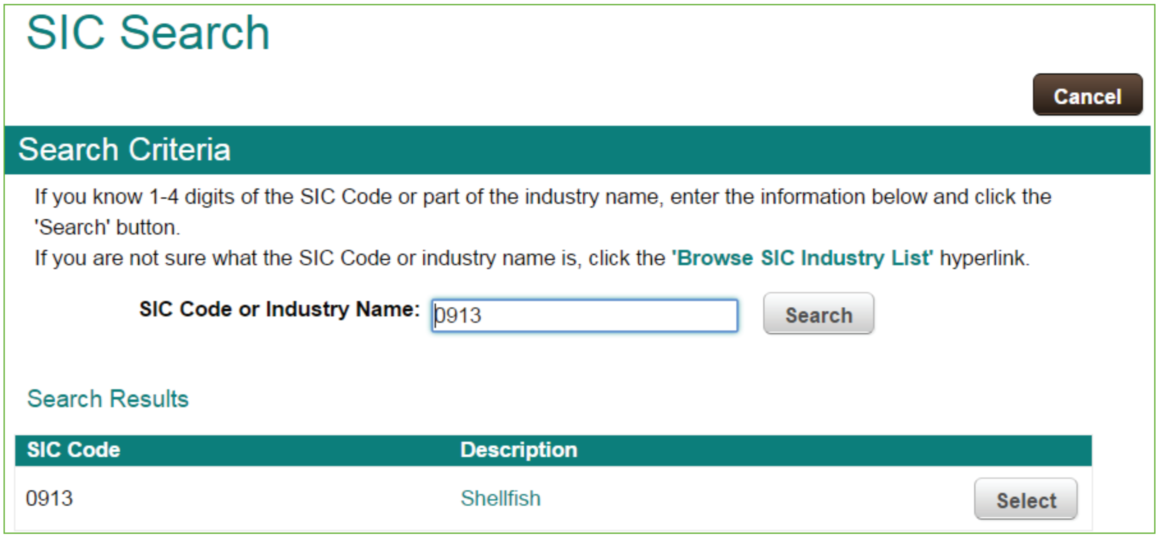
All of your quotes are assigned to you. Your name and agency name (if applicable) will auto-populate. To complete your Owner Assignment, select the *General Agent* option from the drop-down menu to select your agency.



Specifying the Owner Assignment is key to using SWP because it creates a relationship within the system and integrates with Health Net's back-end systems, including billing.

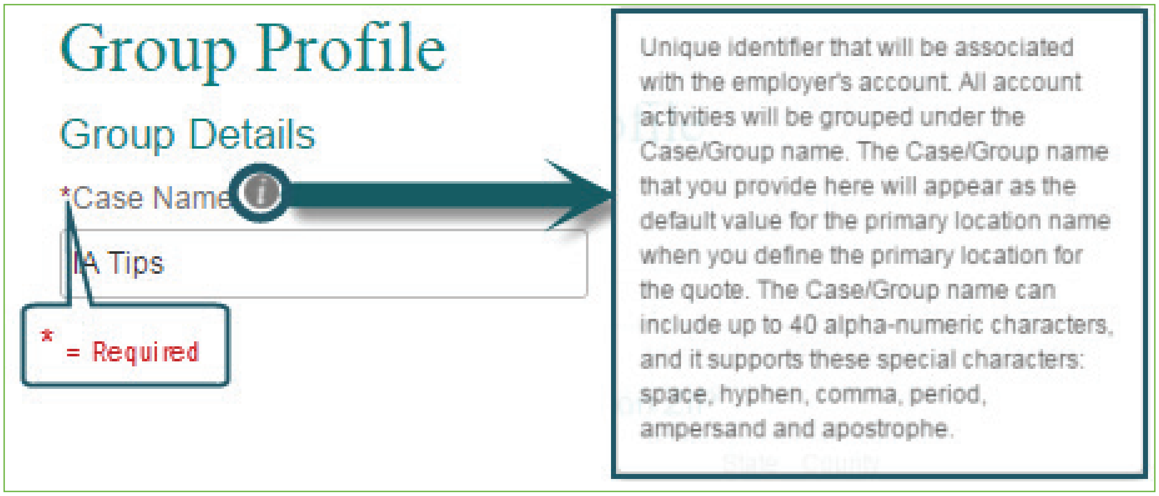
SIC Codes

You can search alphabetically or by number to find the group's standard industrial classification (SIC) 4-digit code.



Asterisks

Any field in SWP marked with an * is a required element.



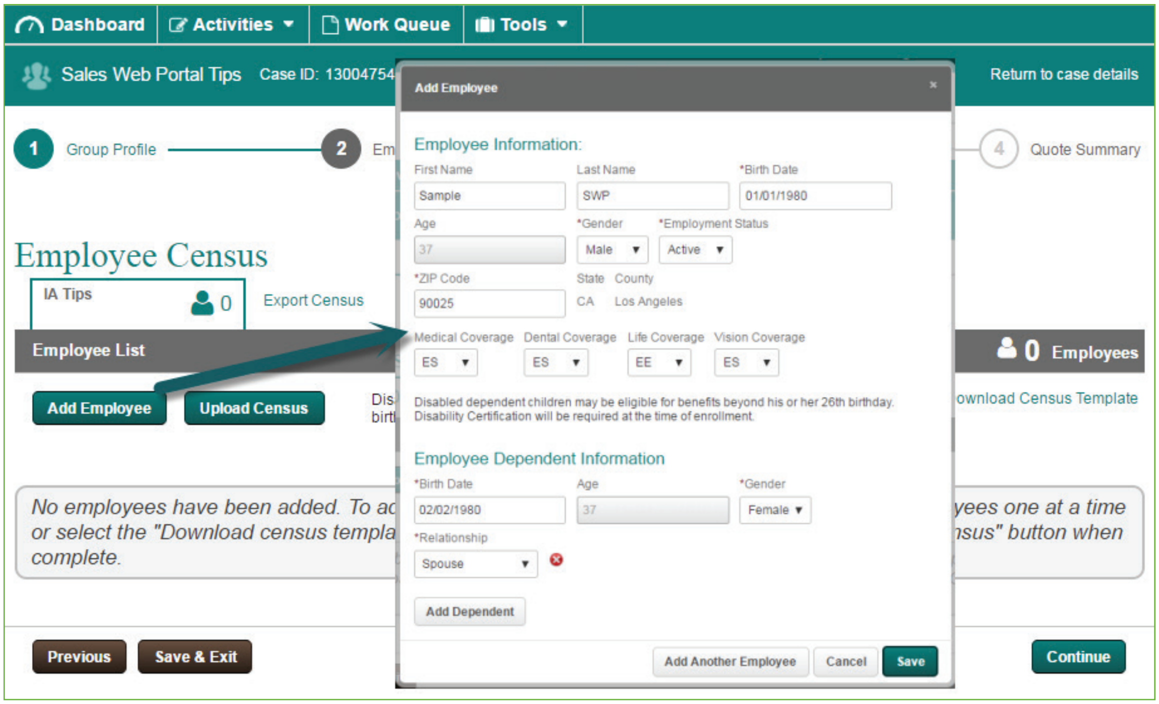
Primary Group Contact

The primary group contact is the person you are working with at the group who can make decisions and who will have direct contact with Sales Web Portal, you and Health Net. A contact name is not required to generate quotes.

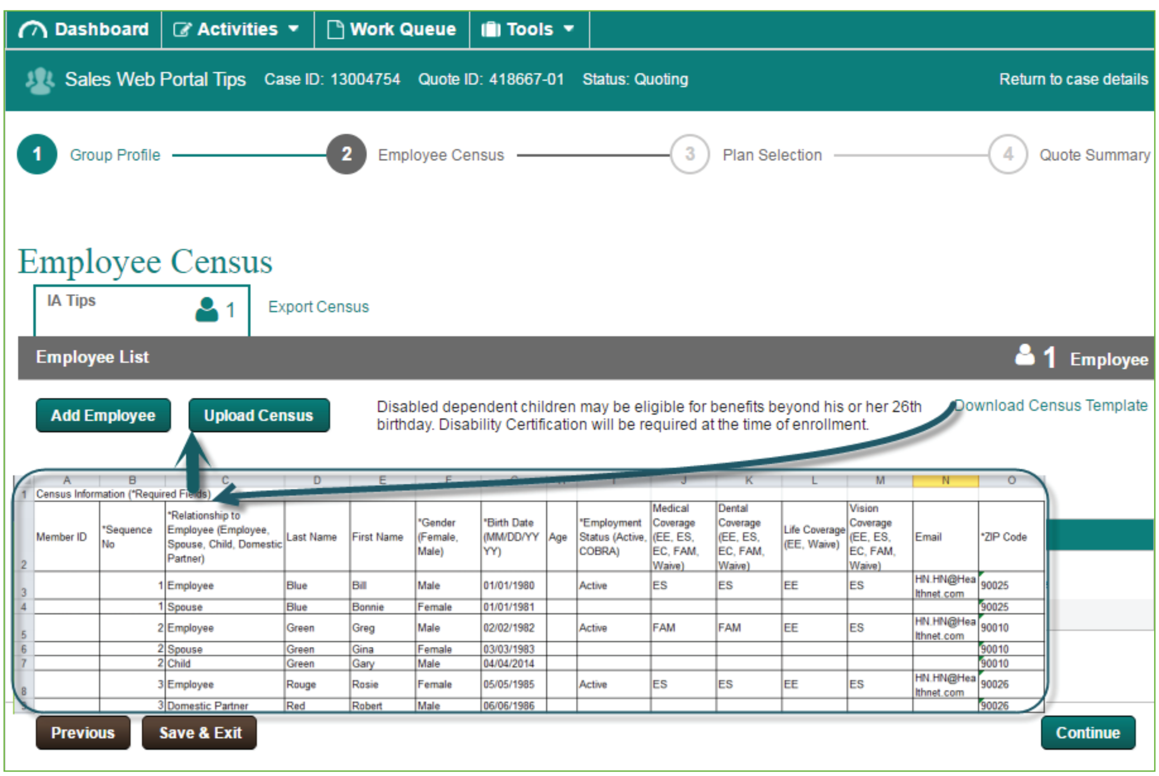
Census

There are three ways to complete the employee census:

1. **Add employees and dependents one by one.** This method is convenient when the group has just a few employees. Details are easy to edit right within the tool.



2. **Upload the census using our census template.**



Important!

When using our template, the format cannot be altered or it will not function properly.

Error Messages

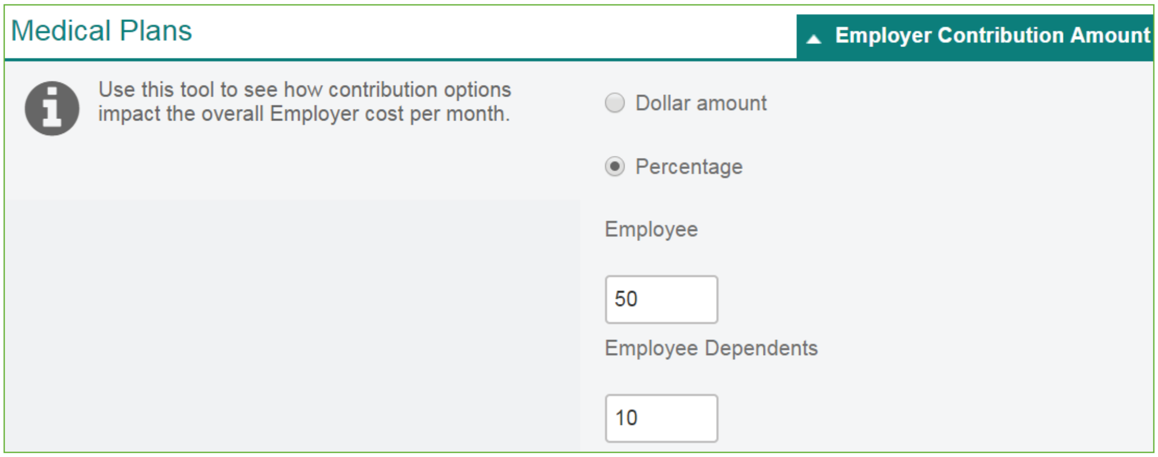
Errors appear in red. If a page does not automatically move ahead, look for red text to pinpoint what information needs correcting or completing.

Employer Contribution

- SWP sets the minimum required medical contribution for employees at 50%. You may choose to make a higher contribution by replacing 50 with the percentage you want.

  The minimum required contribution for ancillary products like dental may vary. For example, while the minimum for medical is 50%, dental could be 75%.

- For a fixed dollar amount, click the *Dollar amount* button and then enter the amount. Note that $100 is the minimum medical dollar contribution.

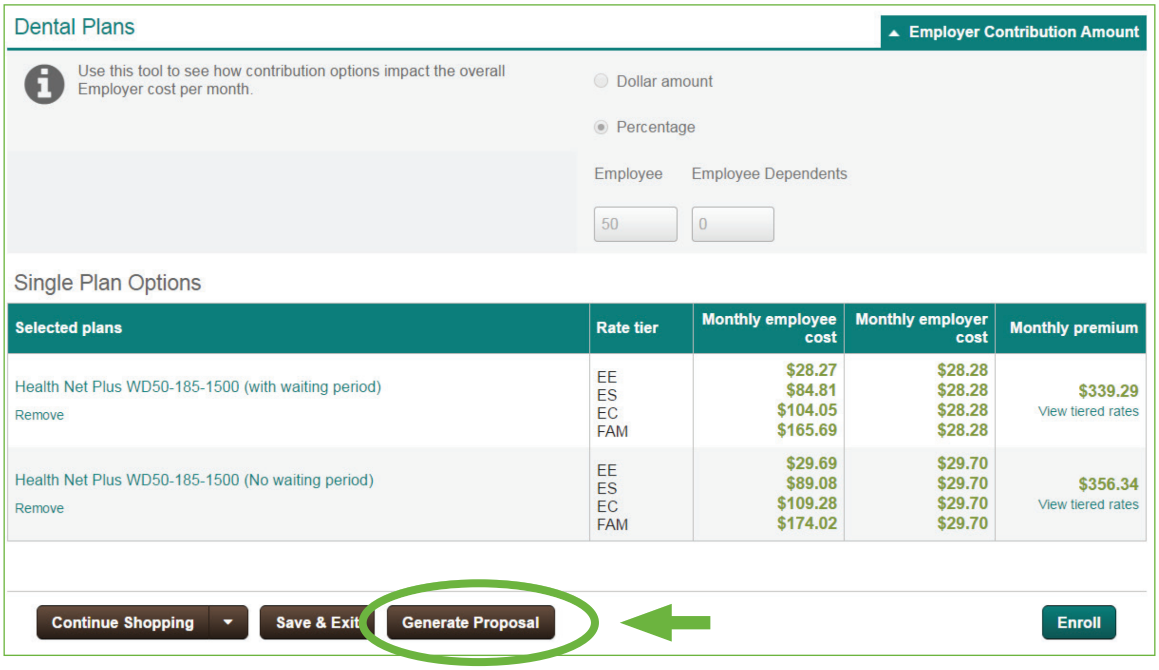


- You can modify the contribution amount at any time up until the Final Plan Selection step.

Generate Proposal

Following the Plan Selection and Contribution Amount steps, you'll see several options as shown below. To generate a proposal, click on the *Generate Proposal* tab.

Once you click *Generate Proposal*, you can't modify or make further changes. What you can do is start a new quote by going back to Case Details and clicking on the *Quotes* tab.

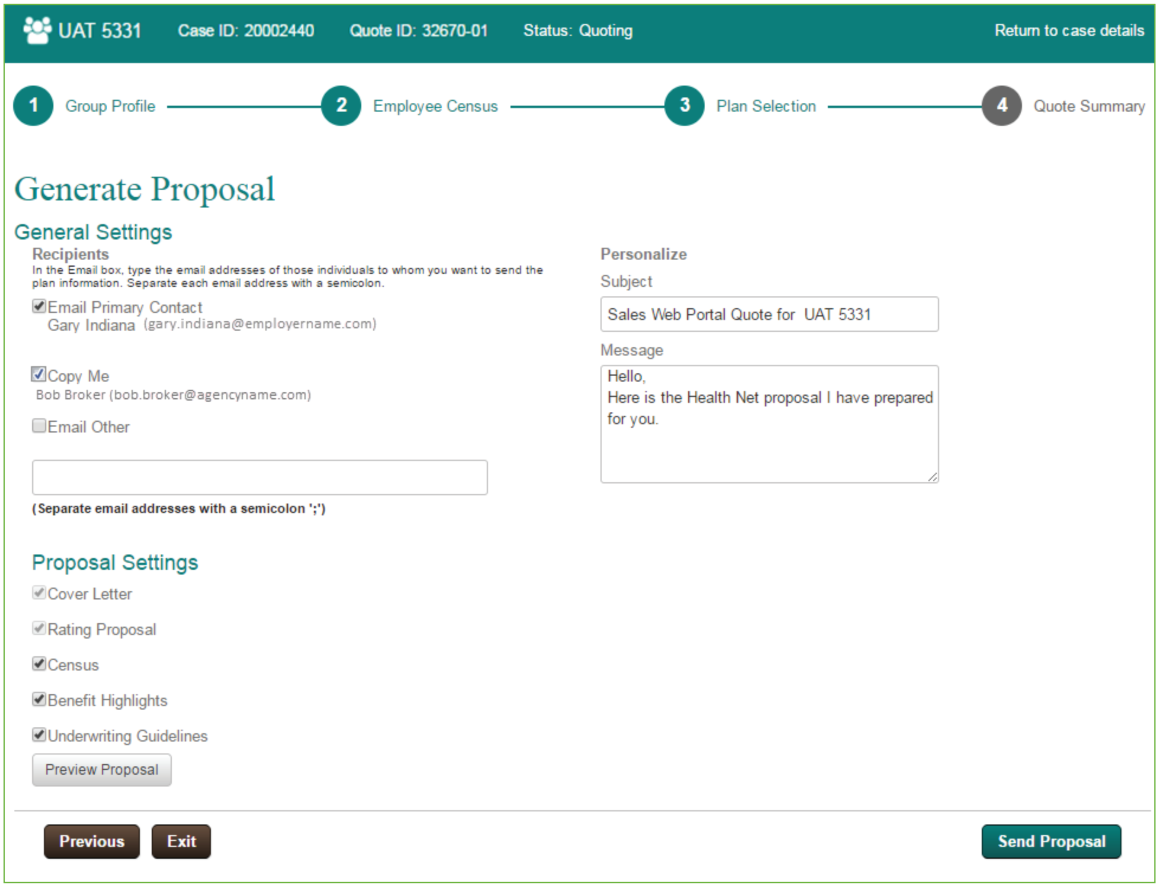


Personalizing Emails

When your quote is ready, you'll email it to your group. The system encrypts the email.

You have the option to personalize your email, so you can easily track your quotes and give your client helpful reference information.

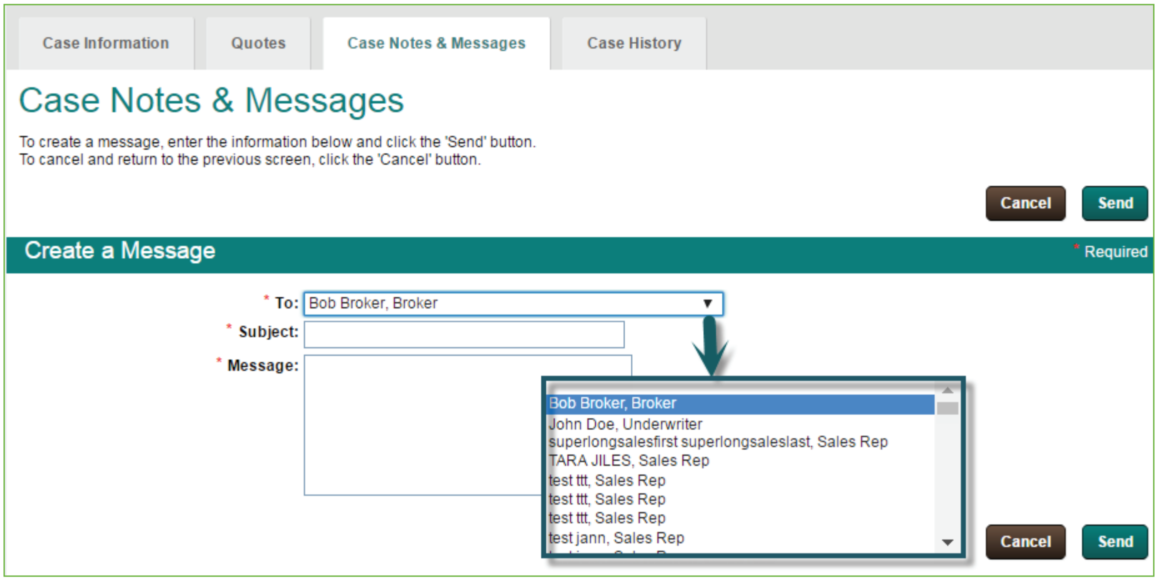
- **Subject line:** Include the group name and case ID in the subject line, so it's easy to find the quote you want in your email inbox.



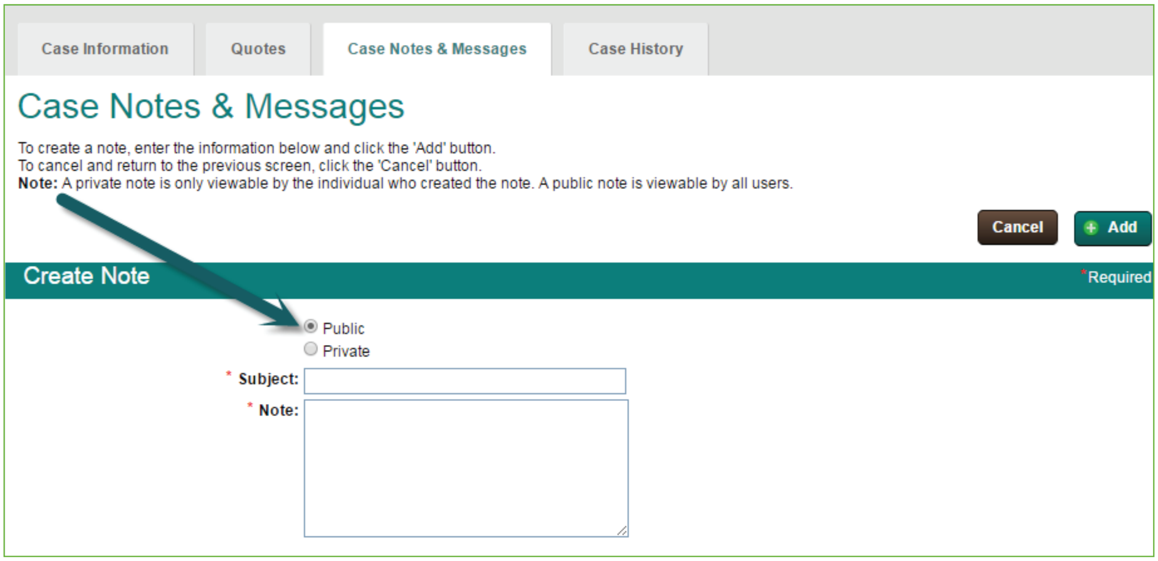
- **Message:** We recommend adding the recipient's name followed by: Enclosed is the Health Net plan proposal I created for you. I'll give you a call to discuss it. Thanks!
- The standard proposal attached in the email will be titled with the name of the case. If you would like to include the case ID and quote ID in the body of your email, you can copy and paste them from the page header.

Case Notes & Messages

- SWP has an internal messaging system under Case Notes & Messages. Anytime you complete an action in SWP, you'll get a message in your Message Center. You'll also get a message for changes in demographics or in quote status.



- Plus, you can use this feature to communicate messages about your case to Health Net departments such as Sales and Underwriting.
- Notes can be public (visible to any user in SWP) or private (for you only).
- Emails sent from SWP stay in the system. You won't see them in your personal email account.



Compatibility

- SWP is compatible with Google Chrome, Mozilla Firefox, Microsoft Internet Explorer 11 (or newer), and Safari. For the best user experience, use the latest browser version.
- SWP performs best when you regularly clear your computer cache. The way you clear your cache depends on the browser you use. Here are the most common:
  - **Internet Explorer 11** – Internet Options/General/Browsing History/Delete
  - **Google Chrome 61.0.3163.100** – History/History/Clear Browsing Data/Clear Browsing Data
  - **Mozilla/Firefox 55.0.3** – History/Clear Recent History
  - **Safari 10.0** – Preferences/Privacy/Remove All Website Data or Manage Website Data

Note: These instructions may vary if your browser is a different version. Instructions on how to clear your computer cache can be found by doing a search via the Web.

System Time and Idle

- SWP runs on Eastern time (ET).
- The system will idle for one hour before it times out.

File Formats

- When uploading files, use any of these format extensions:
  - Microsoft Excel (.xls, .xlsx)
  - Microsoft Word (.doc, .docx)
  - Document (.rtf, .txt)
  - Adobe Acrobat (.pdf)
  - Image (.jpg, .gif)
- **Sending an Excel file?** SWP performs best with Excel 97–2003. If you're using Excel 2010 or later, you can do a Save As to save as an earlier version.

Carol Kim,
Health Net
We put the pieces together for sustainable affordability.

Section 3

Sales Web Portal Terms

Activities
General recent records, New Case, New Quote menu.

Benefit Highlights
An abbreviated description of the benefit components.

Case
Name of the employer, account or policyholder.

Case History
Detailed list of actions taken related to a specific case.

Case Information
Case details about a prospective account.

Dashboard
Displays a list of the user's open quotes for easy reference.

Locked Quote
When a user has either previewed or generated the proposal, it can no longer be edited. You can see the quote in read-only mode by clicking *View*.

Message Center
Area where messages are posted and only visible in SWP.

MGA
Managing General Agency.

Notes and Messages
Feature that allows users to record notes and/or send messages to other parties within SWP. Accessible via the main page and with links throughout the application.

Owner Assignment
Sales Rep, Broker, Agency, or General Agency linked to a case.

Producer Agency, Firm
Producer/Broker Agency.

Producer User
Contact at Broker Agency.

Quote
The proposal with rates and product options.

Quote History
Past quotes related to a specific case.

Recent Items
Last few cases or quotes the user has viewed.

SSO
Single Sign On, which gives brokers who are signed in to the broker portal at HealthNet.com direct access to SWP.

Status Descriptions

Case

New

Case has been created, no quote generated.

Prospect

Newly created case that stays in effect indefinitely until the employer chooses to decline the quote.

Inactive

When the system determines that case activity has been terminated (i.e., the case has been opened but never quoted, or the quote was created and withdrawn and there are no other active activities on that case). A case can be re-activated when a new quote is entered in the same case record at a later date.

Quote

Quoting

A quote has been created and is now locked. Remains in quoting status until it's withdrawn or it expires.

Expired

An incomplete quote 30 days after the requested effective date of coverage.

Withdrawn

A quote that has been withdrawn.

Section 4

Sales Web Portal

How-To Videos

Watch our computer-based training (CBT) videos for detailed how-tos on the key functions of SWP and the online quote process. Available on the Broker Hub, **www.healthnet.com/thehub**.

Topics include:

- Quote Setup
- How to Complete a Census
- How to Configure Benefits and Make Plan Selections
- Proposals
- Quote Summary
- Complete a Search (Case/Activity)
- Notes and Messages
- Employer Verification
- Quote Status Values