

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.

Section 1

Fast Path to Sales Web Portal

Section 2

Favorite Tips & Tricks

Section 3

Sales Web Portal Terms

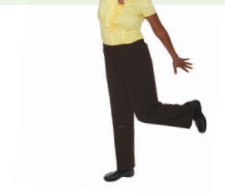
Section 4

How-To Videos



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.



Patrice Holloway,
Health Net

*We support your
business with local,
dedicated teams.*



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.

The screenshot shows the HealthNet.com interface. At the top, a navigation bar includes 'Home > Broker > My Dashboard > My Dashboard - View Member Coverage'. Below this is a menu bar with 'My Dashboard', 'Book of Business & Commissions', 'Customer Status & Activity', 'Sales Tools and Quoting', and 'Contracting, Certification & Support'. A callout '1' points to the 'Sales Tools and Quoting' menu item. The main content area is titled 'Quoting Tools' and includes a sub-navigation bar with 'My Dashboard', 'Book of Business & Commissions', 'Customer Status & Activity', 'Sales Tools and Quoting', and 'Contracting, Certification & Support'. A callout '2' points to the 'Sales Tools and Quoting' menu item. Below this are tabs for 'Quoting Tools', 'Plan and Benefit Information', and 'Marketing Materials'. The 'Quoting Tools' tab is active, showing several sections: 'Plans for Individuals & Families', 'Small Business Groups', 'Update Your Co-branded Website Information', 'Compare Plan Costs with Cost Advisor', 'Medicare', and 'Quick Links'. A callout '3' points to the 'SBG New Business Quote & Proposal' link under the 'Small Business Groups' section. The 'Quick Links' section includes links for 'Secure Messaging', 'Key Contacts for Brokers', 'Forms and Brochures', 'View Current Commissions', 'Quote Individual and Family Plans', 'IFP Activity History', 'Small Group Quote and Proposal', and 'SBG Renewals'. A callout '3' also points to the 'Small Group Quote and Proposal' link in the 'Quick Links' section.



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.

Health Net

Case Name

Dashboard

Account Settings

Log Out

Dashboard Activities Work Queue Tools

Account Settings

To modify your profile information, edit any of the fields below then click the 'Save' button.

User Information

Contact Information

Security

Change Password Modify Security Question

Personalization

* Notification Method

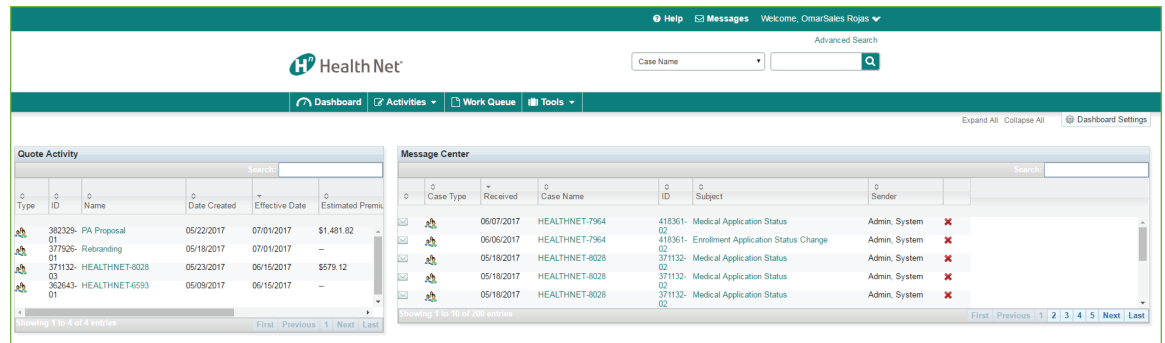
Both

Message Center
Email
Both

Cancel Save

Dashboard

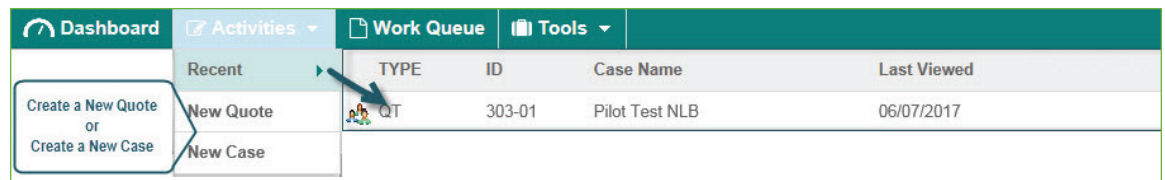
- Your dashboard will be blank the first time you use SWP. You'll see "No data was found. Please check again later." for both the Message Center and Quote Activity.



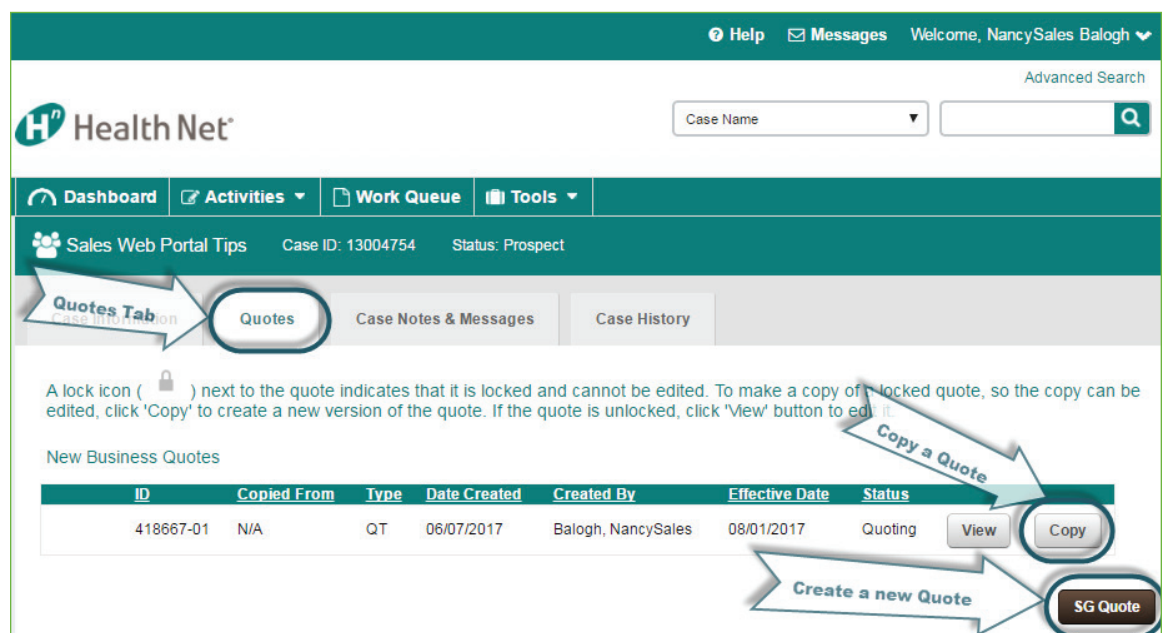
- Your dashboard will populate with your information once you start quoting in the system.
- You can customize the look of your dashboard by using any of the layout design templates. Select *Dashboard Settings* from the SWP menu to customize.

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.

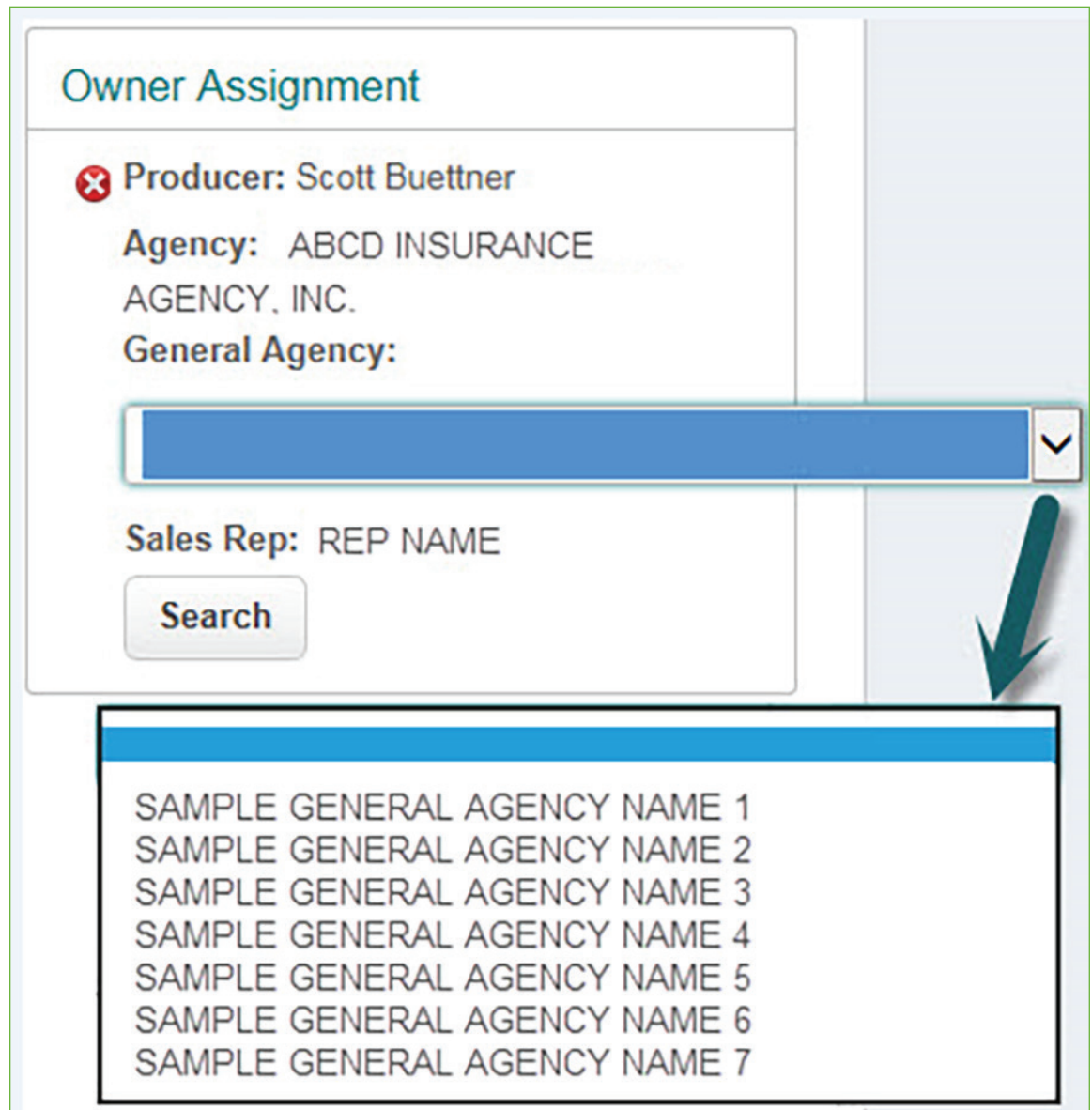


Select the **SG Quote** button from the Quotes tab on the Case Information page.



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.



The screenshot shows a web form titled "Owner Assignment". It contains the following fields and elements:

- Producer:** Scott Buettner (with a red 'x' icon to the left)
- Agency:** ABCD INSURANCE AGENCY, INC.
- General Agency:** A blue dropdown menu with a downward arrow icon on the right. A large green arrow points to this dropdown menu.
- Sales Rep:** REP NAME
- Search:** A button with the text "Search".

Below the form, a dropdown menu is open, displaying a list of seven sample general agency names:

- SAMPLE GENERAL AGENCY NAME 1
- SAMPLE GENERAL AGENCY NAME 2
- SAMPLE GENERAL AGENCY NAME 3
- SAMPLE GENERAL AGENCY NAME 4
- SAMPLE GENERAL AGENCY NAME 5
- SAMPLE GENERAL AGENCY NAME 6
- SAMPLE GENERAL AGENCY NAME 7

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.

SIC Search

Cancel

Search Criteria

If you know 1-4 digits of the SIC Code or part of the industry name, enter the information below and click the 'Search' button.
If you are not sure what the SIC Code or industry name is, click the '[Browse SIC Industry List](#)' hyperlink.

SIC Code or Industry Name:

Search Results

SIC Code	Description	
0913	Shellfish	<input type="button" value="Select"/>

Asterisks

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

Group Profile

Group Details

*Case Name 

IA Tips

* = Required

Unique identifier that will be associated with the employer's account. All account activities will be grouped under the Case/Group name. The Case/Group name that you provide here will appear as the default value for the primary location name when you define the primary location for the quote. The Case/Group name can include up to 40 alpha-numeric characters, and it supports these special characters: space, hyphen, comma, period, ampersand and apostrophe.

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.

Add Employee

Employee Information:

First Name: Sample, Last Name: SWP, *Birth Date: 01/01/1980

Age: 37, *Gender: Male, *Employment Status: Active

*ZIP Code: 90025, State: CA, County: Los Angeles

Medical Coverage: ES, Dental Coverage: ES, Life Coverage: EE, Vision Coverage: ES

Employee Dependent Information:

*Birth Date: 02/02/1980, Age: 37, *Gender: Female

*Relationship: Spouse

Buttons: Add Employee, Add Another Employee, Cancel, Save, Continue

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



Important!

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

Employee Census

IA Tips: 1 Employee

Buttons: Add Employee, Upload Census, Download Census Template

Member ID	*Sequence No	*Relationship to Employee (Employee, Spouse, Child, Domestic Partner)	Last Name	First Name	*Gender (Female, Male)	*Birth Date (MM/DD/YYYY)	Age	*Employment Status (Active, COBRA)	Medical Coverage (EE, ES, EC, FAM, Waive)	Dental Coverage (EE, ES, EC, FAM, Waive)	Life Coverage (EE, Waive)	Vision Coverage (EE, ES, EC, FAM, Waive)	Email	*ZIP Code
1		1 Employee	Blue	Bill	Male	01/01/1980		Active	ES	ES	EE	ES	HN.HN@Healthnet.com	90025
2		1 Spouse	Blue	Bonnie	Female	01/01/1981							HN.HN@Healthnet.com	90025
3		2 Employee	Green	Greg	Male	02/02/1982		Active	FAM	FAM	EE	ES	HN.HN@Healthnet.com	90010
4		2 Spouse	Green	Gina	Female	03/03/1983							HN.HN@Healthnet.com	90010
5		2 Child	Green	Gary	Male	04/04/2014							HN.HN@Healthnet.com	90010
6		3 Employee	Rouge	Rosie	Female	05/05/1985		Active	ES	ES	EE	ES	HN.HN@Healthnet.com	90026
7		3 Domestic Partner	Red	Robert	Male	06/06/1986							HN.HN@Healthnet.com	90026

Buttons: Previous, Save & Exit, Continue

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.

Medical Plans

Employer Contribution Amount

 Use this tool to see how contribution options impact the overall Employer cost per month.

Dollar amount

Percentage

Employee

Employee Dependents

- 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.

Dental Plans

▲ Employer Contribution Amount

 Use this tool to see how contribution options impact the overall Employer cost per month.

Dollar amount
 Percentage

Employee Employee Dependents

Single Plan Options

Selected plans	Rate tier	Monthly employee cost	Monthly employer cost	Monthly premium
Health Net Plus WD50-185-1500 (with waiting period)	EE	\$28.27	\$28.28	\$339.29 <small>View tiered rates</small>
Remove	ES	\$84.81	\$28.28	
	EC	\$104.05	\$28.28	
	FAM	\$165.69	\$28.28	
Health Net Plus WD50-185-1500 (No waiting period)	EE	\$29.69	\$29.70	\$356.34 <small>View tiered rates</small>
Remove	ES	\$89.08	\$29.70	
	EC	\$109.28	\$29.70	
	FAM	\$174.02	\$29.70	

Continue Shopping ▾ **Save & Exit** **Generate Proposal** ← **Enroll**

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.

UAT 5331 Case ID: 20002440 Quote ID: 32670-01 Status: Quoting [Return to case details](#)

1 Group Profile — 2 Employee Census — 3 Plan Selection — 4 Quote Summary

Generate Proposal

General Settings

Recipients
In the Email box, type the email addresses of those individuals to whom you want to send the plan information. Separate each email address with a semicolon.

Email Primary Contact
Gary Indiana (gary.indiana@employername.com)

Copy Me
Bob Broker (bob.broker@agencyname.com)

Email Other

(Separate email addresses with a semicolon ';')

Personalize

Subject
Sales Web Portal Quote for UAT 5331

Message
Hello,
Here is the Health Net proposal I have prepared for you.

- **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.

The screenshot shows the 'Case Notes & Messages' interface. At the top, there are tabs for 'Case Information', 'Quotes', 'Case Notes & Messages', and 'Case History'. Below the tabs is the title 'Case Notes & Messages' and instructions: 'To create a message, enter the information below and click the 'Send' button. To cancel and return to the previous screen, click the 'Cancel' button.' There are 'Cancel' and 'Send' buttons on the right. Below this is a green header 'Create a Message' with a 'Required' indicator. The form contains three fields: '* To:' with a dropdown menu showing 'Bob Broker, Broker', '* Subject:', and '* Message:'. A dropdown menu is open from the 'To:' field, listing several users: 'Bob Broker, Broker', 'John Doe, Underwriter', 'superlongsalesfirst superlongsaleslast, Sales Rep', 'TARA JILES, Sales Rep', 'test ttt, Sales Rep', 'test ttt, Sales Rep', 'test ttt, Sales Rep', and 'test jann, Sales Rep'. There are 'Cancel' and 'Send' buttons at the bottom right of the form.

- 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.

The screenshot shows the 'Case Notes & Messages' interface. At the top, there are tabs for 'Case Information', 'Quotes', 'Case Notes & Messages', and 'Case History'. Below the tabs is the title 'Case Notes & Messages' and instructions: 'To create a note, enter the information below and click the 'Add' button. To cancel and return to the previous screen, click the 'Cancel' button.' There are 'Cancel' and 'Add' buttons on the right. Below this is a green header 'Create Note' with a 'Required' indicator. The form contains two radio buttons for 'Public' (selected) and 'Private', followed by '* Subject:' and '* Note:' text input fields. A blue arrow points to the 'Public' radio button. There are 'Cancel' and 'Add' buttons at the bottom right of the form.

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