

Sales Web Portal

Quick Reference Guide

Small Business Group

Sales Web Portal (SWP) was created to speed up quotes and enrollment by giving you one sales tool to quote and enroll for small business group plans. To help you take your sales farther, faster, we've created this quick reference guide that includes:

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.

1 My Dashboard - View Member Coverage

Home > Broker > My Dashboard > My Dashboard - View Member Coverage

My Dashboard Book of Business & Commissions Customer Status & Activity Sales Tools and Quoting Contracting, Certification & Support

Brokers Welcome, Bob Broker! ProviderSearch Website Accessibility

Quoting Tools

Home > Broker > Sales Tools & Quoting > Quoting Tools > Quoting Tools

My Dashboard Book of Business & Commissions Customer Status & Activity Sales Tools and Quoting Contracting, Certification & Support

Quoting Tools Plan and Benefit Information Marketing Materials

Plans for Individuals & Families

Whether your client is a company employee or self-employed, retired or in-between jobs, Health Net has the right plan. Find the right plan for your clients, get a quote and get them enrolled – all online!

Go to Quoting Tool

Small Business Groups

Quote small groups, manage your proposals, view rate tables and manage your quoting profile.

SBG New Business Quote & Proposal
New Business Quoting Profile
Rate Tables (SBG)

Update Your Co-branded Website Information

Manage the information on your co-branded quoting website here.

Learn More

Compare Plan Costs with Cost Advisor

Help your clients understand the costs associated with different types of plans.

Go to Cost Advisor

Medicare

Help your clients find the right Medicare plan in their area and get them enrolled.

Find a Medicare Plan

Quick Links

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
SBG Renewals

Andre Hamil,
Health Net
We partner with you to promote workforce health.

Section 2

Favorite Tips & Tricks

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

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.

State - County

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' section of the SWP interface. At the top, there are tabs for 'Case Information', 'Quotes', 'Case Notes & Messages' (which is active), and 'Case History'. Below the tabs, the title 'Case Notes & Messages' is displayed, followed by 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.' On the right, there are 'Cancel' and 'Send' buttons. Below this is a green header bar labeled 'Create a Message' with a 'Required' indicator. The form fields include: 'To:' with a dropdown menu showing 'Bob Broker, Broker'; 'Subject:' with a text input field; and 'Message:' with a large text area. A dropdown menu is open from the 'To:' field, showing a list of contacts: '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'. On the right side of the form, there are 'Cancel' and 'Send' buttons.

- 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' section of the SWP interface. At the top, there are tabs for 'Case Information', 'Quotes', 'Case Notes & Messages' (which is active), and 'Case History'. Below the tabs, the title 'Case Notes & Messages' is displayed, followed by 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.' Below this, a note states: 'Note: A private note is only viewable by the individual who created the note. A public note is viewable by all users.' On the right, there are 'Cancel' and 'Add' buttons. Below this is a green header bar labeled 'Create Note' with a 'Required' indicator. The form fields include: 'Public' and 'Private' radio buttons, with 'Public' selected; 'Subject:' with a text input field; and 'Note:' with a large text area. A green arrow points to the 'Public' radio button. On the right side of the form, there are 'Cancel' and 'Add' buttons.

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.



Important!

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

Dashboard Activities Work Queue Tools

Sales Web Portal Tips Case ID: 13004754

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

Employee Census

IA Tips 0 Export Census

Employee List

Add Employee Upload Census

No employees have been added. To add employees one at a time, click the "Add Employee" button. To download the census template, click the "Download census template" button.

Previous Save & Exit

Add Employee

Employee Information:

First Name Last Name *Birth Date

Sample SWP 01/01/1980

Age *Gender *Employment Status

37 Male Active

*ZIP Code State County

90025 CA Los Angeles

Medical Coverage Dental Coverage Life Coverage Vision Coverage

ES ES EE ES

Disabled dependent children may be eligible for benefits beyond his or her 26th birthday. Disability Certification will be required at the time of enrollment.

Employee Dependent Information

*Birth Date Age *Gender

02/02/1980 37 Female

*Relationship

Spouse

Add Dependent

Add Another Employee Cancel Save

Continue

2. Upload the census using our census template.

Dashboard Activities Work Queue Tools

Sales Web Portal Tips Case ID: 13004754 Quote ID: 418667-01 Status: Quoting

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

Employee Census

IA Tips 1 Export Census

Employee List

Add Employee Upload Census

Download Census Template

Disabled dependent children may be eligible for benefits beyond his or her 26th birthday. Disability Certification will be required at the time of enrollment.

| 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 | Rossie | 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 |

Previous Save & Exit

Continue

3. **Use a combination of the census and manual adds.** If you upload a census and then edit it, we recommend exporting the final list for reference.

You can always return to the Employee Census page if you need to make changes.

Note that any changes may impact rates.


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.

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.

| Dashboard | | Activities | Work Queue | Tools | | |
|---|-----------|---|------------|--------|----------------|-------------|
| Create a New Quote or Create a New Case | Recent | | TYPE | ID | Case Name | Last Viewed |
| | New Quote |  | QT | 303-01 | Pilot Test NLB | 06/07/2017 |
| | New Case | | | | | |

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

Health Net

Case Name

Dashboard Activities Work Queue Tools

Sales Web Portal Tips Case ID: 13004754 Status: Prospect

Quotes Tab Case Information

Quotes Case Notes & Messages Case History

A lock icon () next to the quote indicates that it is locked and cannot be edited. To make a copy of a locked quote, so the copy can be edited, click 'Copy' to create a new version of the quote. If the quote is unlocked, click 'View' button to edit it.

New Business Quotes

| ID | Copied From | Type | Date Created | Created By | Effective Date | Status |
|-----------|-------------|------|--------------|--------------------|----------------|---------|
| 418667-01 | N/A | QT | 06/07/2017 | Balogh, NancySales | 08/01/2017 | Quoting |

Copy a Quote

Create a new Quote

SG Quote

New Quote: A faster path when you don't have all the contact info or want a quick quote. You'll start with a mini-group profile.

You'll be able to do a full Create Case later in the sales process.

The screenshot shows the 'Group Profile' form in the SWP system. The form is part of a four-step process: 1. Group Profile, 2. Employee Census, 3. Plan Selection, and 4. Quote Summary. The form includes sections for Group Details, Physical Location ZIP, Requested Effective Date, Total Number of Eligible Employees, and Industry Type. A sidebar on the right shows the Owner Assignment details.

Group Profile

Group Details
Case Name ⓘ
Sales Web Portal Tips

Physical Location ZIP
*ZIP Code ⓘ State County
90025 CA Los Angeles

Requested Effective Date
*Requested Effective Date ⓘ
▼

Total Number of Eligible Employees
*Total Eligible ⓘ
□

Industry Type
*SIC Code ⓘ SIC Code Description
2021 Butter

Owner Assignment
✖ Producer: DanaAZBrok Manley
Agency: Dana Broker Agency
General Agency:
Sales Rep: DAN TYLER
Search

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.

The screenshot shows the HealthNet dashboard with the following sections:

Quote Activity

| Type | ID | Name | Date Created | Effective Date | Estimated Premium |
|----------------|-----------|----------------|--------------|----------------|-------------------|
| PA Proposal | 382329-01 | PA Proposal | 05/22/2017 | 07/01/2017 | \$1,481.82 |
| Rebranding | 377626-01 | Rebranding | 05/19/2017 | 07/01/2017 | -- |
| HEALTHNET-8028 | 371132-03 | HEALTHNET-8028 | 05/23/2017 | 06/15/2017 | \$579.12 |
| HEALTHNET-6593 | 362643-01 | HEALTHNET-6593 | 05/09/2017 | 06/15/2017 | -- |

Message Center

| Case Type | Received | Case Name | ID | Subject | Sender |
|----------------|------------|----------------|-----------|--------------------------------------|---------------|
| HEALTHNET-7964 | 06/07/2017 | HEALTHNET-7964 | 418361-02 | Medical Application Status | Admin, System |
| HEALTHNET-7964 | 06/05/2017 | HEALTHNET-7964 | 418361-02 | Enrollment Application Status Change | Admin, System |
| HEALTHNET-8028 | 05/19/2017 | HEALTHNET-8028 | 371132-02 | Medical Application Status | Admin, System |
| HEALTHNET-8028 | 05/19/2017 | HEALTHNET-8028 | 371132-02 | Medical Application Status | Admin, System |
| HEALTHNET-8028 | 05/19/2017 | HEALTHNET-8028 | 371132-02 | Medical Application Status | Admin, System |

- 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.

Employee Enrollment Notices

- There are two employee notices that you'll trigger manually to email to employees:


- **Initial Enrollment Notice**

- **Enrollment Reminder**

The notices will include a unique PIN code, assigned by the system, that allows each employee to shop and enroll online.

Enrollment snapshot

Open enrollment is in progress



Enrollment period
05/08/2017 - 06/07/2017
Effective date
06/15/2017

Total eligible employees: 3
1 Enrolled 0 In progress 2 Not started

Send a message to unenrolled employee

Manage enrollments

- [View group details](#)
- [Modify open enrollment dates](#)
- [Cancel enrollment](#)
- [View reports](#)
- [Export employee PIN list](#)

Send messages

- [Resend site confirmation PIN to employer](#)
- [Resend open enrollment notification to employee](#)

AgentActivity_1627....c...

The Employee PIN list will be downloaded to an Excel file called "Agent Activity"

| | A | B | C | D |
|---|-------------|----------|------------|------------------------|
| 1 | Employee ID | PIN | Name | Subgroup |
| 2 | e939585 | BL001043 | Bill Blue | All Employees@SWP Test |
| 3 | e939586 | GRN09875 | Gary Green | All Employees@SWP Test |
| 4 | e939587 | RD000736 | Rosie Red | All Employees@SWP Test |

- The primary group contact will need to give PIN codes to any employee whose email is not included in the census. The employer can export a list of the employee PIN codes from SWP.

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.

The screenshot shows a web interface for 'Medical Plans' with a sub-header 'Employer Contribution Amount'. On the left, an information icon (i) is next to the text: 'Use this tool to see how contribution options impact the overall Employer cost per month.' On the right, there are two radio buttons: 'Dollar amount' (unselected) and 'Percentage' (selected). Below these are two input fields. The first is labeled 'Employee' and contains the value '50'. The second is labeled 'Employee Dependents' and contains the value '10'.

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

Employer Registration

- This page goes to the primary group contact when you are ready for her/him to complete the group enrollment form.
- The primary group contact enters her/his first and last name and the company's Federal Tax ID.

The screenshot shows a web interface titled 'Employer Registration'. Below the title, it says: 'Before moving on in the registration process, please verify your group information by entering your full name as it was entered on the group enrollment application, and federal tax ID number below.' There are two input fields. The first is labeled '*Full Name (as entered on group enrollment application)' and the second is labeled '*Federal Tax ID:'. Both fields are empty. At the bottom right, there is a green button labeled '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.



Tip!

Maximum file size
for an attachment
is 2 MB.

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.

Generate Proposal before Enroll

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

50

0

Single Plan Options

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

Continue Shopping

Save & Exit

Generate Proposal

Enroll

10

Language Assistance

Multilingual help for employees during enrollment is just a click away. The language support link at the bottom of the Enrollment page generates a PDF in 15 different languages with instructions on whom to contact for further assistance.

The screenshot displays the 'Household eligibility' page in English. A callout box labeled 'Language Assistance' points to the 'Español' link in the footer. Below the English page, the Spanish version 'Elegibilidad del hogar' is shown, mirroring the English content. The English page includes a warning about a 10-day deadline for enrollment changes, eligibility for employer-sponsored coverage (Medical, Dental, Vision, Life), enrollment period (2/14/2017 - 4/28/2017), and coverage start date (4/1/2017). A 'Start shopping' button is at the bottom right. The Spanish page has identical information in Spanish, with a 'Comenzar a buscar' button.

Household eligibility

! You have 10 days left to make changes to your enrollment choices. All changes must be completed before April 28.

Sit, you and your dependents listed below are eligible for coverage from your employer.

Employer-sponsored coverage

Eligible for: Medical, Dental, Vision, Life

Enrollment period: 2/14/2017 - 4/28/2017

Coverage starts: 4/1/2017

You'll be shopping for coverage your employer is offering from Health Net of California, Inc. and/or Health Net Life Insurance Company (Health Net).

You also have the option to waive any coverage that you don't want—or waive all coverage.

Start shopping

English **Español** Information in other languages

Home Terms of Service Privacy Policy Accessibility Statement

Elegibilidad del hogar

! Tiene 10 días restantes para realizar cambios en sus opciones de inscripción. Todos los cambios deben ser completados antes de abril 28.

Sit, usted y sus dependientes mencionados a continuación son elegibles para la cobertura de su empleador.

Cobertura patrocinada por el empleador

Elegibles para: Medical, Dental, Vision, Life Sit, Sat, Sit

Período de inscripción: 2/14/2017 - 4/28/2017

La cobertura inicia: 4/1/2017

Estara comprando cobertura que su empleador ofrece por medio de Health Net of California, Inc. y/o Health Net Life Insurance Company (Health Net).

Pero también tiene la opción de rechazar cualquier cobertura que no desee, o rechazar toda la cobertura.

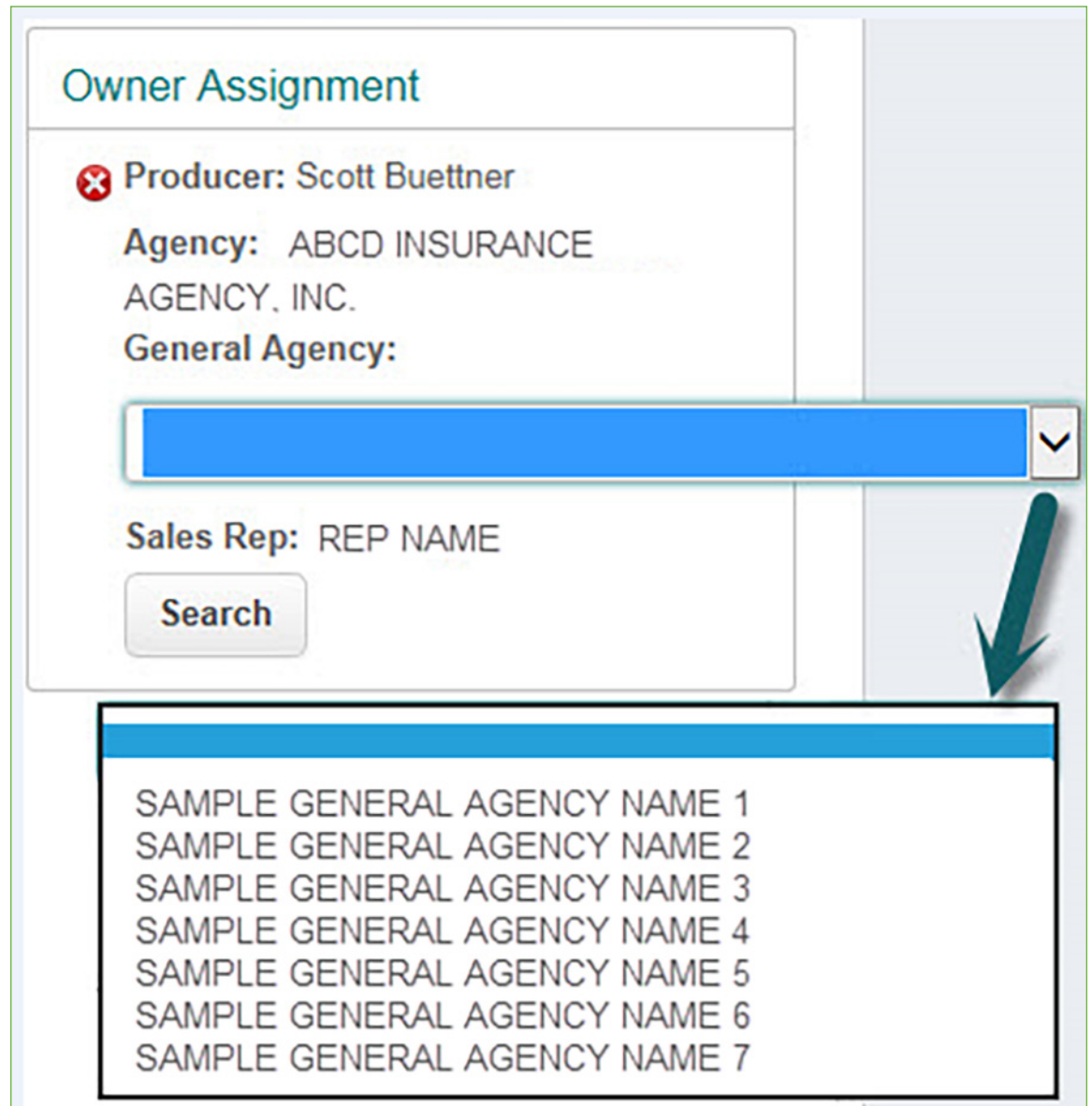
Comenzar a buscar

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.

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)
- Agency:** ABCD INSURANCE AGENCY, INC.
- General Agency:** A blue dropdown menu is open, showing a list of sample agency names. A green arrow points to this dropdown.
- Sales Rep:** REP NAME
- Search:** A button.

The dropdown menu for "General Agency" is open, displaying the following list:

- 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 enrollment and billing.
- Enables automated enrollment setup.

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.

Proposal Settings

☒ Cover Letter

☒ Rating Proposal

☒ Census

☒ Benefit Highlights

☒ Underwriting Guidelines

Preview Proposal

Previous Exit Send Proposal

- **Message:** We suggest 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.

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, but you will need to provide one during enrollment.

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

Search Results

| SIC Code | Description |
|----------|-------------|
| 0913 | Shellfish |

Select

System Time and Idle

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



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

General Agent (GA 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 enroll or decline the quote.

Active

When an employer accepts the quote and begins the enrollment process.

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 the employer begins enrollment, it's withdrawn or it expires.

Applying

When a user initiates the enrollment process to complete the employer application.

Expired

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

Withdrawn

A quote that has been withdrawn.

Enrollment Quote

Applying

When a user initiates the enrollment process to complete the employer application.

Enrolling

Employer enrollment has begun but is not complete.

Enrollment

Employer application has been submitted. The enrollment site is set up and/or employee enrollment is in progress.

Submitted (UW)

Employee enrollment is complete and the Open Enrollment window closed. The package is submitted to underwriting.

Review (UW)

Underwriting has opened the submitted enrollment.

Accepted (UW)

Underwriting has accepted the final enrollment proposal.

Canceled

When enrollment is withdrawn or canceled.

Expired

When enrollment remains incomplete at 30 days after the requested effective date of coverage.

Invalid

Automatically applied to a record when there is an error with the SWP file.

ABS Processed

Policyholder and suffixes are activated in ABS, Health Net's membership system.

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 and enrollment 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
- Group Enrollment
- Employer Verification
- Employee Enrollment
- Employee Shopping
- Quote Status Values
- Employee Shopping: ProviderSearch