Broker Renewal Plan Change

From the home screen, go to the review your renewal section and locate the group for which you'd like to submit the plan change. Or you can click the view entire book of Business Link and search for the group. A landing page for that group opens with the available renewal options.

Groups can update some of their group information by clicking here. You can view the current renewal packet by clicking the link.

Under make renewal plan changes, you can either compare current plans to alternate renewal plans or compare renewal plans to alternate renewal plans. The first screen is confirmation that you wish to change plans for the group's current renewal. Confirm the effective dates for the renewal. Click next. On the group details tab, select whether you are offering another carrier. If yes, select the carrier from the pull-down menu and enter the number of enrollees.

Confirm the physical address of the company. If you need to change the address, you can do it on the screen. Click next. On the subscriber tab, you can view the census information for the group. You can remove subscribers by clicking remove to the right of the subscriber record. To add members, click manually add subscribers. Enter the number of subscribers you are adding and click add. Enter the subscriber's name, date of birth, and zip code, which will also fill in the county field. Click next.

On the plan selection tab, the plans the group is offering as part of the renewal are listed. To add a plan, click Add Medical Plans, select them, and click Add Plans to Portfolio. If you don't want to add any plans, click undo add plans. To delete or replace a plan, click edit to the right of the plan. Select whether you want to replace the plan with another plan in the portfolio or with a new plan not currently in the portfolio. For an existing plan, select the replacement plan from the pull-down menu and click Done. You'll see a confirmation message and the specifics are listed. You can undo the change by clicking the link to the right and clicking Yes in the confirmation box. For a new plan, select the new plan and then select the new replacement plan from the list that opens. Plans not currently in the portfolio will have a Choose this plan link. If there is no link, then it's already in the portfolio. You'll see a confirmation message and the specifics are listed. You can undo the change by clicking the link to the right and click yes in the confirmation box. Scroll down to the bottom of the list to see the new plan. Repeat the process for dental plans. Click next.

On the plan assignment screen, all the subscribers are listed. You can sort the list by the options in the pull-down menu to find subscribers. You can see the subscriber's current medical plan and select a different medical plan if the subscriber wants to change for the subscriber who was just added. Select their medical plan. Click next.

On the rating type and contribution tab the rating type will be member-level. Select specifics for employer contributions and other fields will open based on your selections. Click next.

On the review rates tab, you can see rating and contribution information and group-level premiums for the specified plans, including premium changes. Premiums for each subscriber are listed, and you can see an overview as well as detailed information by clicking the medical tab. If a subscriber changed plans, the premium change is listed here. Scroll to the bottom of the screen. Click next.

If a new subscriber was added or if other documentation is required as part of this transaction the required documents screen will open. If not, this step will not be part of the workflow. Upload the documents listed by either dragging and dropping them into the designated space or by clicking select files and browsing to the file location. The document name will be listed. You can select the document type from the pull-down menu. Enter any relevant comments. Click attach. If you don't click this button, the form will not be sent with the transaction. The uploaded documents will be listed.

You can download the document or remove it using the links to the right. Click next. Review the attestation, then fill out your name and title. Provide your signature and click accept signature. Please include the name and contact information of the person in charge of this transaction, as well as any comments. Click submit. You'll see a confirmation message. Click close.

You will also get a confirmation message via e-mail within 10 to 15 minutes.

The submitted plan change is listed in the transactional history on your dashboard. Once the plan change is approved, you will receive a confirmation letter.

The status of the transaction will change to completed.