# Process an Alternate Funded (MEWA) Requote/Copy Quote Broker Job Aid

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| Introduction | The purpose of this document is to show steps for processing an Alternate Funded Requote/Copy. This functionality is for Alternate Funded (MEWA) quotes only. |
| Entry Criteria | There is already an account created for the group and the group has an existing new Alternate Funded (MEWA) quote that is:   * Less than 90 days old * In a “Final” (UW has assigned a risk factor) **or** * “Presented” status (final output file generated) * The broker would like to requote/copy.   **Tip:** If the quote is in any other status, it is recommended that you start a new quote. |
| Benefits | * You do not have to wait days to receive a requote when changing: Products, Plan Selection, Group Contact Info or Broker Info   + Future enhancements to include the following: SIC Code, Eff Date, Zip Code and # of Employees in a future releases * Sales Support and Underwriting will have fewer requotes coming through the queue * Sales Support and Underwriting can easily identify the reason for requoting |
| Additional Notes | * Select **all** requote reasons that apply during the requote. If all the reasons do not require Underwriting review, you can generate a quote immediately. If even one reason requires Underwriting review, the quote will go to Underwriting. * If not submitted to UW, follow the steps to generate the Final Output File (only certain states).   + For states where the Final Output File is generated for them, Quote/ Review Final MEWA Output * Many fields and screens are locked/not editable if the requote reasons do not affect those data points.  **Example:** If you select SIC Code for requote reason, you cannot also change the census. You must go back to the requote reasons and select Census as well * You can go back to requote screen and select additional reasons if a field is locked that you need to change |

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Process an Alternate Funded Requote/Copy

Follow the steps below to begin the requote process.

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| Access Quotes Screen | |  |  | | --- | --- | | **Step** | **Action** | | 1 | Select **Start a New Quote** button on the Home screen.    **Result:** The “Quotes” page loads, displaying a choice to create a New Quote or to view Previous Quotes. | | 2 | Select the **Market** from the first drop-down (in this example it is “Small Group”). | | 3 | Next, select the **State** then select the **Create Quote.** | |

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| Access Quotes Screen | |  |  | | --- | --- | | **Step** | **Action** | | 4 | Select the **Quotes** tabon the **“Homepage/Dashboard”** screen.    **Result:** This loads a broker’s quotes. | | 5 | Locate the quote that you want to requote by using the search field to search by group name or changing the list view to “Recently Quoted”.  **Note**: A “Requote Link” column shows which quotes can be Requoted/Copied (see Entry Criteria at beginning of document). | |

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Process an Alternate Funded Requote/Copy, continued

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| Start a Requote | |  |  | | --- | --- | | Step | Action | | 6 | After locating the group and the quote you want to requote, start the requote by selecting the **Requote/Copy** link from the list.  **Result:** The Quoting License and Contract Validation screen appears.  **Note:** The screens in the requote workflow will show all the data that was provided on the original quote. | | 7 | Select Re-Quote from the Reason drop-down list.  **Result:** A pop-up window appears with a selection of requote reasons. | |

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| Start a Requote, continued | |  |  | | --- | --- | | Step | Action | | 8 | Select a reason(s) for the requote from the list then select **OK**.  **Notes:**   * You can select/hover over the blue information icon next to some of the reasons to learn how changing the selected option can affect the quote. * When you select a reason(s) the system will unlock the fields related to that reason  For example, selecting “Census” will allow you to make changes to the census information during the requote process. * Refer to the [Requote/Copy Quote Reasons Informational](#CreateQuote1) Grid to see how each reason selected will affect the screens in the process.     **Result:** Once you select OK you are brought to the Quoting License and Contract Validation screen. | | 9 | Click **Continue** on each screen to move through the requote process like the original quote process. Change the applicable fields for the reason(s) selected.   **Note:** You can go backwards in the process using the breadcrumbs across the top to go back to the appropriate screen then update the applicable field from the Requote/Copy Quote Reasons list.  **Result:** Generate a new quote and quote identification number (ID). | |

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**Requote/Copy Quote Reasons Information Grid**

| IMPORTANT INFORMATION: Please review rules on editable fields as sometimes more fields than the reason indicated can be updated. | | | | | | | | | | | | |
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| Requote Reason | Submit to UW? | License/ Contract | Group Details | Product and Coverages | Employee census | Medical/ Dental/ Vision/ L&D | Group Contact | Review Preliminary Plan selection | View quote | Get final quote (question-naire page) | Confirm-ation |
| Zip Code/ County | No  **Note:** Zip must be from the same state | Display page: fields editable | Display page: fields locked | Sole proprietor: locked;  Parent entity: locked and not visible; Risk factor: mapped from final risk factor of original quote; Risk factor: coverage selection: not locked; Dental prior coverage: not locked | Display page: fields are locked | Display page: Plans are preselected from original quote, but editable | Display page: fields locked | Display page: fields are editable | Display page  ***Note:*** *Clicking on Request final quote changes the quote to final status WITHOUT going to underwriter* | Not displayed | Not displayed |
| Census | Yes | Display page: fields locked | Display page: fields locked | Display page: fields locked | Display page: fields are editable | Display page: Plans are preselected from original quote, but editable | Display page: fields locked | Display page: fields are editable | Display page | Display page: user can upload documents; **Goes to Underwriter** | Page Displayed |
| Medical History | Yes | Display page: fields locked | Display page: fields locked | Display page: fields locked | Display page: fields locked | Display page: Plans are preselected from original quote; NOT editable | Display page. Plans are pre-selected from original quote, NOT editable | Display page: fields are locked | Display page | Display page: user can upload documents; **Goes to Underwriter** | Page Displayed |
| SIC Code | No | Display page: fields locked | Display page: fields locked except for SIC Code | Sole proprietor: locked;  Parent entity: locked and not visible; Risk factor: mapped from final risk factor of original quote; Risk factor: coverage selection: not locked; Dental prior coverage: not locked | Display page fields locked  ***Note:*** *If Specialty is added, those fields are editable, & dependents can be added.* | Display page: Plans are preselected from original quote, but editable | Display page: fields locked | Display page: fields are editable | Display page  ***Note:*** *Clicking on Request final quote changes the quote to final status WITHOUT going to underwriter* | Not displayed | Not displayed |
| Effective Date | Yes | Display page: fields locked | Display page: fields locked | Sole proprietor: locked;  Parent entity: locked and not visible; Risk factor: mapped from final risk factor of original quote; Risk factor: coverage selection not locked; Dental prior coverage: not locked | Display page: fields are editable | Display page: Plans are preselected from original quote: but editable | Display page: fields locked | Display page: fields are editable | Display page | Display page: user can upload documents; **Goes to Underwriter** | Page Displayed |
| # Eligible Employees | Yes | Display page: fields locked | Display page: fields locked except for # eligible employees | Sole proprietor: locked;  Parent entity: locked and not visible; Risk factor: mapped from final risk factor of original quote; Risk factor: coverage selection not locked; Dental prior coverage: not locked | Display page: fields are editable | Display page: Plans are preselected from original quote, but editable | Display page: fields locked | Display page: fields are editable | Display page | Display page: user can upload documents; **Goes to Underwriter** | Page Displayed |
| Products | No | Display page: fields locked | Display page: fields locked | Sole proprietor: locked;  Parent entity: locked and not visible; Risk factor: mapped from final risk factor of original quote; Risk factor: should be locked, coverage selection not locked; Dental prior coverage: not locked | Display page fields locked  ***Note:*** *If Specialty is added, those fields are editable, & dependents can be added* | Display page: Plans are preselected from original quote, but editable | Display page: fields locked | Not displayed | Display page  ***Note:*** *Clicking on Request final quote changes the quote to final status WITHOUT going to underwriter* | Not displayed | Not displayed |
| Plan Selection | No | Display page: fields locked | Display page: fields locked | Display page: fields locked | Display page: fields locked | Display page: Plans are preselected from original quote, but editable | Display page: fields locked | Not displayed | Display page;  ***Note:*** *Clicking on Request final quote changes the quote to final status WITHOUT going to underwriter* | Not displayed | Page not displayed |
| Group Contact Inform-ation | No | Display page: fields locked | Display page: fields locked | Display page: fields locked | Display page: fields locked | Display page: Plans are preselected from original quote, NOT editable | Display page: fields are editable | Not displayed | Display page; ***Note:*** *Clicking on* ***Request final quot****e changes the quote to final status WITHOUT going to under-writer* | Not displayed | Page not displayed |
| Broker Inform-ation | No | Display page: all fields locked except broker search | Display page: fields locked | Display page: fields locked | Display page: fields locked | Display page: Plans are preselected from original quote, NOT editable | Display page: fields locked | Not displayed | Display page;  ***Note:*** *Clicking on* ***Request final quot****e changes the quote to final status WITHOUT going to under-writer* | Not displayed | Page not displayed |

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| Complete a Requote | |  |  | | --- | --- | | Step | Action | | 10 | Select the Generate a Final Quote button.  Graphical user interface, application  Description automatically generated   |  |  | | --- | --- | | If Underwriting review is … | Then you are … | | Not required | Routed to the quote home page.  Select the button to Generate/review the Final Quote PDF and Monthly Plan Comparison (MPC). | | Is required | Routed to the Submit to Underwriting page.  Go to Step 11. | | | 11 | **Note:** The following screen is shown only when the quote must be submitted to Underwriting review.  Select **Submit to Underwriting** for quotes noted as “Requote must be submitted to Underwriter” under the “Get Final Quote” column of the  Requote/Copy Quote Reasons Informational Grid above.  **Note:** Underwriting notifies you when rates are recalculated, and new Quote is ready. | |