**StepWise Quoting Basic Troubleshooting**

1. **I’m an internal user and I can’t get in.**
   1. *What is the website address that you are going to? Do they have the link or are they referencing not having the link and therefore unable to get in?* – The link is pushed via a Serving Blue Request. If they have not received one that was ordered, Desktop needs to confirm that the work was complete. If they did not order the link, they need to order it.
   2. *Have you requested access in Serving Blue? (Ryan Sims’ group can verify AD group)* – Access is handled by being added to an AD group. If they have not requested access, they cannot get in and need to request access. Serving Blue has an item request for Shop. They will select the environments that they need links to and the role that they will have. If they have not logged out completely and logged back in, they may not have picked up the permissions. Have them try this.
   3. *What error message are you getting when logging in?* – Utilize whatever is provided to begin troubleshooting the issue.
2. **I’m an external user (Broker/Producer) and can’t get in.**
   1. *What is the website address that they are going to? Are they able to see the link on the Broker page?* – If they cannot see the link, this is directed to the Web team. The link should be available to them.
   2. *If they see the link, what message are they getting?* – Access is controlled via a cookie driven by the Broker portal. If they are unable to access the system, the cookie needs to be validated as containing all of the correct information. Additionally, they will need to confirm that the needed Broker relationships exist in all of the tables. Redirect this to the Web team to confirm and investigate.
3. **My quotes are not generating.**
   1. Are there any error messages being generated?
   2. Are the services all running? This can be checked in the Management Studio.
   3. Are there a large number of quotes that are currently processing? This can be checked in the Management Studio.
   4. Validate that the quote looks good and should be generating.
   5. Engage Optum.
4. **A button/function is not working correctly.**
   1. Verify that this is only affecting this user.
   2. Verify that the user should have access to the function. Not all users have access to everything.
   3. Investigate any error messages that are generated.
   4. Engage Optum.
5. **The incorrect Broker/Producer/BDE/Firm information is showing.**
   1. This information is all sourced from CRM loads. If you receive a ticket like this, verify the information and if possible, get the Broker/Producer NPN. Open a ticket or forward the existing ticket to the CRM team to research.
6. **I cannot find the quote that I created.**
   1. Are you in the correct environment? Each internal user has multiple environments that they have access to. They need to confirm that they are searching in the correct environment.
   2. Are you a broker? Broker views have been limited so that they cannot pull back quotes outside of their firm and sometimes only to themselves. Was the quote generated under the same ID that they are currently logged in as?
   3. Are they an internal user? All internal users should be able to see all quotes. Confirm that access changes have not occurred with the VAM team members that are managing security.

**Optum Support**

Support Email [stepwisesupport@optum.com](mailto:stepwisesupport@optum.com)

Phone Support 1-800-683-8434

Normal priority issue responses are generally within 1 business day

High priority/production issue responses are generally within 1 hour during normal business hours